

INSPIRATIONneo

Sessions module



User manual

11/5/2021

Product line neo, version 6.x

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

INSPIRATIONneo

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

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1 General information

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2 Introduction

The Sessions module offers users the possibility to search recorded sessions, filter them according to different criteria thus to reduce the total number to a manageable amount, and subsequently replay, analyze and evaluate them. Sessions are conversations with screen recording, mere screen recordings (work item), conversations with video recording (video call), SMS/SDS (text messages), chats or mere call recordings.

Session details

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

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

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

If an evaluation reveals that the evaluated agent requires a training, the supervisor can assign him a training package based on a session. As a consequence, deficits are not only revealed but eliminated right away.



For further information about training packages refer to the user manual *INSPIRATIONneo - Usage E-Learning module*.

If the selected session qualifies as a training session, the user can tag this session and make it available to other agents, too. They can then profit from the real-life example, see tagged comments and learn how an ideal (or not-so-ideal) customer-agent interaction looks like. Training sessions are subsequently available automatically in the Coaching Advisor module, too.



See user manual *INSPIRATIONneo - Usage Quality Management module*

Searching for calls

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

- Agent details (e. g. the agent's first name and last name)
- Organization unit of the agent
- Information about the time and duration of a session (e. g. start and end time)
- CTI information (e. g. call direction, hold time or session transfers)
- Conversation information (e. g. conversation type)
- Information about the statistics of the conversation (e. g. number of ringing sections, duration of hold sections)
- Calling party information
- Information about the organization unit of the calling party
- Called party information
- Information about the organization unit of the called party
- 1st-Connected Participant Information

- Information about the organization unit of the first-connected party
- Additional data
- Categories
- General information (e. g. creation date, date of the update)

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

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

- Analysis lists (lists containing various keywords for one search topic)
- Synonym lists (lists with synonyms of a keyword)
- Keywords
- Audio analysis jobs (may contain several analysis lists and keywords)
- Emotions
- Full-text search in transcriptions

While general information about a session may help to find calls from a certain date or with a certain duration, a search which considers speech analysis information allows finding calls with certain content and topics such as complaint calls.

To go into the details of the content, there is the additional possibility to use the logical keyword search which combines keywords and analysis lists or synonym lists by means of logical operators (such as “and”, “or”, “not”) to define complex search queries.



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

When *INSPIRATIONneo* has been integrated into a CRM system or other contact center databases, it is possible to add further parameters to the recordings (e. g. classifying the calls). This information can later be used as search criteria as well. To offer an even more efficient and intuitive workflow in the search, users can save their own, frequently used search algorithms to use them again later on.

Replay of a session

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

- Adjusting the replay speed
- Stopping, rewinding or forwarding the recording as required
- Replaying sessions or sections in a loop
- Muting sections of a session to protect sensitive data
- Inserting comments either for the entire session or for certain sections of the session. This function can be used to comment sessions which are to serve as training sessions later on.

Evaluating a session

A session may be evaluated by means of all information required for a reliable evaluation: in addition to replaying the session, a corresponding, previously selected evaluation template is opened, too. Users can edit the template at their own pace, replay the session in any speed, forward or rewind to important sections, and pause the recording. Furthermore, they can tag comments to sections, e. g. to explain the evaluated agent why this passage has been especially good or bad. The comments are also useful if the session is to be used as training session

later on. All evaluations belonging to a session are available centrally in the table of the main view of the Evaluations module. Finalized evaluations can thus be called up and compared at any time.



See user manual *INSPIRATIONneo - Usage Quality Management module*

Releasing sessions for evaluation

You can define that agents have to actively release the sessions which will be evaluated. This means that supervisors can only evaluate sessions that agents have selected on purpose to be evaluated. To do so, you define in the application System Configuration the number of sessions to be evaluated that the agent is supposed to release every week, month or quarter. In addition, there is the possibility to define whether the agent's superior is allowed to only replay and evaluate released sessions or is allowed to load all of the agent's sessions and only evaluate the released ones. The agent is informed via e-mail or within the system if releases are due. This function allows integrating the agent more actively into the quality management process.

Calibration of a session

The calibration function allows users to standardize the evaluation of sessions. To do so, a selected session together with an evaluation template is sent to different supervisors who are asked to evaluate the session within a defined period of time and on basis of the same evaluation principles. Deviations can subsequently be analyzed and corrected.

Automatically categorizing sessions

Sessions can be assigned automatically to a category. This allows displaying all sessions of one category at once and analyzing them in detail. The quality management process can thus be focused on specific topics. You can display specifically sessions from the category *Complaint*, for instance, to evaluate how agents react when customers complain and train them accordingly. Categorizing incoming communication goes beyond the quality management process, though, and can help to find out what the incoming conversations revolve around and how the number of conversations in certain categories evolve over time. Trends can thus be determined in a timely manner. The categories are defined by the users according to their requirements. To do so, each category is described by keywords and phrases. If these keywords and phrases appear in a session, then the session is sorted into the category that the keywords and phrases belong to. To be able to automatically categorize sessions, keyword spotting is required.



For more information about the calibration process refer to the user manual *INSPIRATIONneo - Usage Quality Management module*.

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



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

3

Main view

In the main view, all saved sessions are displayed.

When opening the module, a search filter is set automatically so that only data sets of the last 14 days are displayed by default.








If you would like to configure this default search filter, refer to the administration manual *Administration guideline* for information.

The function *Reset Search* () does not deactivate this filter!

Click on the icon  (*Search*) to adjust the search filter to your requirements.



If conversation rules (view filters) apply for the logged-in user, then the main view only contains those entries which comply with these conversation rules.









Loaded	Conversation Type	Session Start Time	Session Data Start	Session End Time	Session Duration	Call Direction
	Call	11/20/2018 11:33:33 AM	11/20/2018 11:33:55 AM	11/20/2018 11:34:28 AM	00:00:55:639	
	Chat	11/20/2018 11:33:57 AM	11/20/2018 11:33:57 AM	11/20/2018 11:34:27 AM	00:00:30:197	
	Call	11/20/2018 11:33:19 AM	11/20/2018 11:33:26 AM	11/20/2018 11:34:27 AM	00:01:08:100	
	Call	11/20/2018 11:33:19 AM	11/20/2018 11:33:26 AM	11/20/2018 11:34:27 AM	00:01:08:100	
	Call	11/20/2018 11:33:36 AM	11/20/2018 11:33:39 AM	11/20/2018 11:34:01 AM	00:00:24:784	

Rows per page 50 1 - 50 of 460 Last filtered on 11/21/2018 8:56:18 AM ; Number of records 460

Fig. 1: Main view - Sessions (example)

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

Session Information	
<i>Session Start Time</i>	Shows the start time of the session.
<i>Session Data Start</i>	Shows the start time of the data section of the session.
<i>Session End Time</i>	Shows the end time of the session.
<i>Session Duration</i>	Shows the duration of the session.
<i>Conversation Direction</i>	Conversation direction of the session. <ul style="list-style-type: none"> • <i>Internal</i> • <i>Unknown</i>
<i>Call Direction</i>	Call direction of the session <ul style="list-style-type: none">  = incoming  = outgoing  = transferred  = unknown
<i>Kept Session</i>	Shows whether the session is a kept session: <ul style="list-style-type: none">  = kept  = not kept
<i>Evaluated Session</i>	Shows whether the session is an evaluated session: <ul style="list-style-type: none">  = evaluated  = not evaluated

<i>Released for Evaluation</i>	Shows whether the session has been released for evaluation:  = released  = not released
<i>Calibrated</i>	Shows whether the session is a calibrated session:  = calibrated  = not calibrated
<i>Training Session</i>	Shows whether the session is a training session:  = training session  = no training session
<i>Loaded</i>	Shows whether the session has been loaded in the Replay module.  = Session has not been loaded.  = Session has been loaded. <p>The loaded session is assigned a color from a defined color palette. The order of the colors has been predetermined. If all colors of a palette have been used for several sessions, the color assignment starts from the beginning again. In the Replay module, the loaded session is displayed in the same color.</p>
<i>Session ID</i>	Shows the session ID.
<i>Session Transfers</i>	Number of session transfers.
<i>Creation Date</i>	Date on which the session was created.
<i>Transcribed</i>	Shows whether there are transcriptions for the session.
<i>Updated</i>	Date on which the session was updated for the last time.
Conversation Information	
<i>Conversation Type</i>	Displays the type of the conversation. Call = call/video call Work item = work item (screen) Call and screen recording = call and screen Text = SMS/SDS Chat = chat
<i>Conversation Start Time</i>	Shows the start time of the conversation.
<i>Conversation Data Start</i>	Shows the start time of the data section of the conversation.
<i>Conversation End Time</i>	Shows the end time of the conversation.
<i>Conversation Duration</i>	Shows the duration of the conversation.
<i>Conversation ID</i>	Shows the conversation ID.
<i>Conversation ID of Consultation Initiator</i>	If this conversation arose from a consultation within another conversation, this field displays the conversation ID of the original conversation.
Calling Party Information	
<i>Calling Party Name</i>	Shows the name of the calling party.
<i>PBX Agent ID of the calling party</i>	Shows the PBX Agent ID of the calling party.

<i>Calling Party Phone Number</i>	Shows the phone number of the calling party.
Called Party Information	
<i>Called Party Name</i>	Shows the name of the called party.
<i>Called Party PBX Agent ID</i>	Shows the PBX Agent ID of the called party.
<i>Called Party Phone Number</i>	Shows the phone number of the called party.
1st-Connected Participant Information	
<i>1st-Connected Name</i>	Shows the name of the 1st connected.
<i>1st-Connected PBX Agent ID</i>	Filters for the PBX Agent ID of the 1st connected.
<i>1st-connected phone number</i>	Shows the phone number of the 1st connected.
Chat Information	
<i>Subject</i>	Shows the subject of the chat.
Statistics of the Conversation	
<i>Number of Ringing Sections</i>	Shows the number of ringing sections.
<i>Duration of Ringing Sections</i>	Shows the duration of the ringing sections.
<i>Number of Hold Sections</i>	Shows the number of hold sections.
<i>Duration of Hold Sections</i>	Shows the duration of the hold sections.
<i>Number of Connected Sections</i>	Shows the number of connected sections.
<i>Duration of Connected Sections</i>	Shows the duration of the connected sections.
<i>Number of Failed Consultations</i>	Shows the number of failed consultations.
<i>Number of Successful Consultations</i>	Shows the number of successful consultations.
General	
<i>Agent</i>	Name of the agent who is the subject of the session. If several agents participate in a call, a session is created for each agent.
<i>Hold Time</i>	Shows how long the session was "on hold".
<i>Comment</i>	Shows the comments about the session in text.
<i>Customer ID</i>	Shows the ID of the customer. The customer ID can be used to view and administrate a coherent customer history.
<i>Wrap-up Time</i>	Time needed for the post-editing.
<i>Participants</i>	Shows all participant who have participated in a session or in a conversation.
<i>Transaction ID</i>	Shows the ID of the transaction. The transaction ID can be used to view and administrate a coherent transaction history.



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









3.1

Toolbar

The toolbar offers the following functions.



Fig. 2: Toolbar Sessions module

	<i>Refresh</i>	Refreshes the main view.
	<i>Search</i>	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see Search. When opening the module, a search filter is set automatically so that only data sets of the last 14 days are displayed by default. The function by means of the icon  (<i>Reset search</i>) does not deactivate this filter! The icon  (<i>Search</i>) is displayed whenever the search has been adjusted by means of a filter.
	<i>Reset Search</i>	Resets all manually entered search criteria. The search is started without manual filter settings.
	<i>Delete</i>	Deletes the selected session. Sessions which have been saved in the database using the function <i>Keep session</i> have to be released using the function <i>Release session for regular deletion</i> before being able to delete them.
	<i>Evaluate</i>	The selected session is evaluated. See chapter "Evaluate session", p. 55 .
	<i>Load</i>	Loads the selected session into the Replay module for replay. See chapter "Load session", p. 72 . For information about the functions of the Replay module see chapter "Replay module", p. 27 .
Sessions	<i>Define Training Session</i>	The selected session is defined as training session. See chapter "Define training session", p. 51 .
	<i>Keep</i>	Saves the selected session in the database. The storage period is 100 years.
	<i>Release for Regular Deletion.</i>	The session is released for the regular deletion. See chapter "Release session for regular deletion", p. 58 .
	<i>Release for Evaluation / Released for Evaluation</i>	Here, you can release sessions for evaluation (only for agents) See chapter "Release session for evaluation", p. 59 Here, you can evaluate released sessions (only for supervisors). See chapter "Evaluate released session", p. 61 .
	<i>Administrate Categories</i>	Here, you can administrate categories and add keywords to the categories. See chapter "Administrate categories", p. 63 .
	<i>Export</i>	Exports the selected session. See chapter "Export session", p. 73 .
	<i>Calibrate</i>	Here, you can initiate a calibration. See chapter "Create calibration", p. 75 .
	<i>Logical Keyword Search</i>	Here, you can start the logical keyword search. See chapter "Logical keyword search", p. 81 .

		NOTICE! This function is only available if the speech analysis software has been installed and licensed.
	<i>Full-Text Search</i>	Here, you can start a full-text search. See chapter "Full-text search", p. 83 . NOTICE! This function is only available if the speech analysis software has been installed and licensed.
<i>General</i>	<i>Print</i>	Prints the table of the main view.
	<i>Adjust Table</i>	Opens a window in which you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page
	<i>General Help</i>	Via the menu item <i>General Help</i> , a description of the application you are currently viewing is opened.
	<i>Module Help</i>	Via the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened.





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

3.1.1

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.

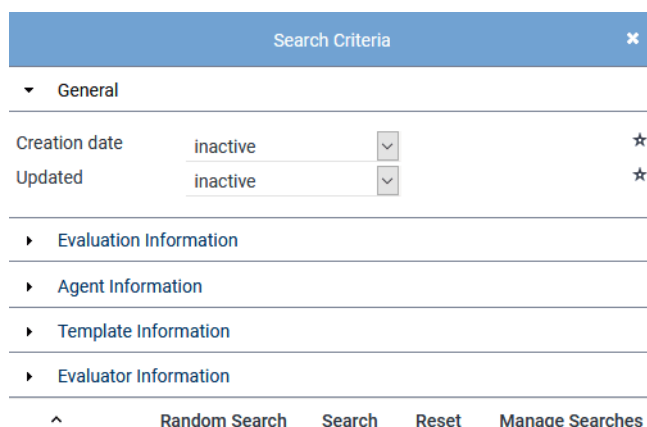



Fig. 3: Window Search Criteria (example)

2. Set the respective search criteria.
NOTICE! It depends on the respective module which search criteria are available.
3. To start the search, click on the button *Search*.
To reset all manually entered search criteria, click on the button *Reset*.
4. Select one of the following options:



<i>Search</i>	The main view displays all set of data which meet the set search criteria.
<i>Random Search</i>	The main view displays up to 50 sets of data selected at random which meet the set search criteria.



Which and how many sets of data are displayed depends on the settings in the System Configuration. Please contact your system administrator if the settings of the random search have to be adjusted.

5. 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 *INSPIRATIONneo - General information*.

3.1.1.1

Search criteria related to audio analysis



Search criteria related to the audio analysis are only displayed if the license for keyword spotting or the license for emotion detection are available.

Search criteria relating to the audio analysis allow you to search for specific content. You can combine the search criteria relating to the audio analysis with the available general search criteria which are based on the additional data provided by sessions.

All values that you can select here are based on the keyword lists and on the analysis jobs which have to be created in the Audio Analysis module in advance.



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

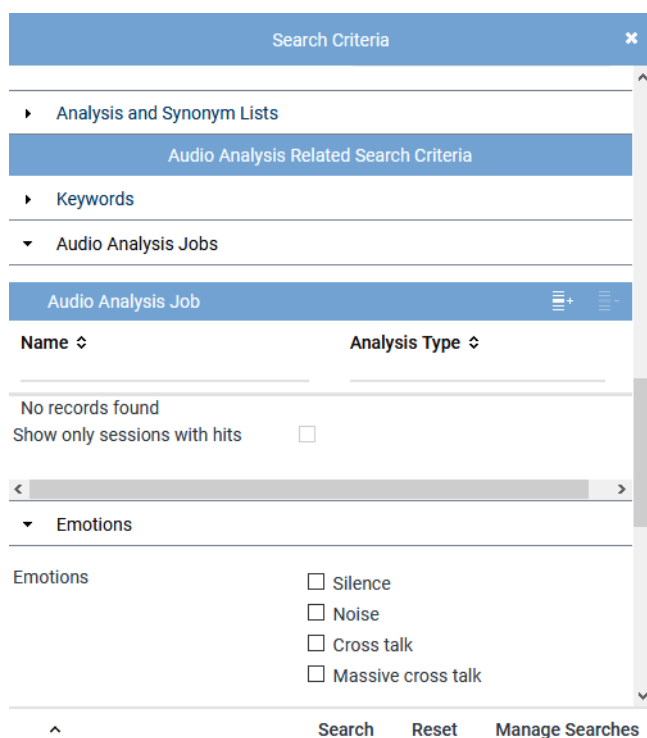



Fig. 4: Search criteria related to audio analysis (example)

The following sub-menus are available:

- Keywords
 - Analysis and Synonym Lists
 - Audio Analysis Jobs
 - Emotions (only for emotion detection)
1. To add a criterion in the sub-menus *Keywords*, *Analysis Lists and Synonym Lists*, and *Audio Analysis Jobs*, click on the icon . The following window appears:

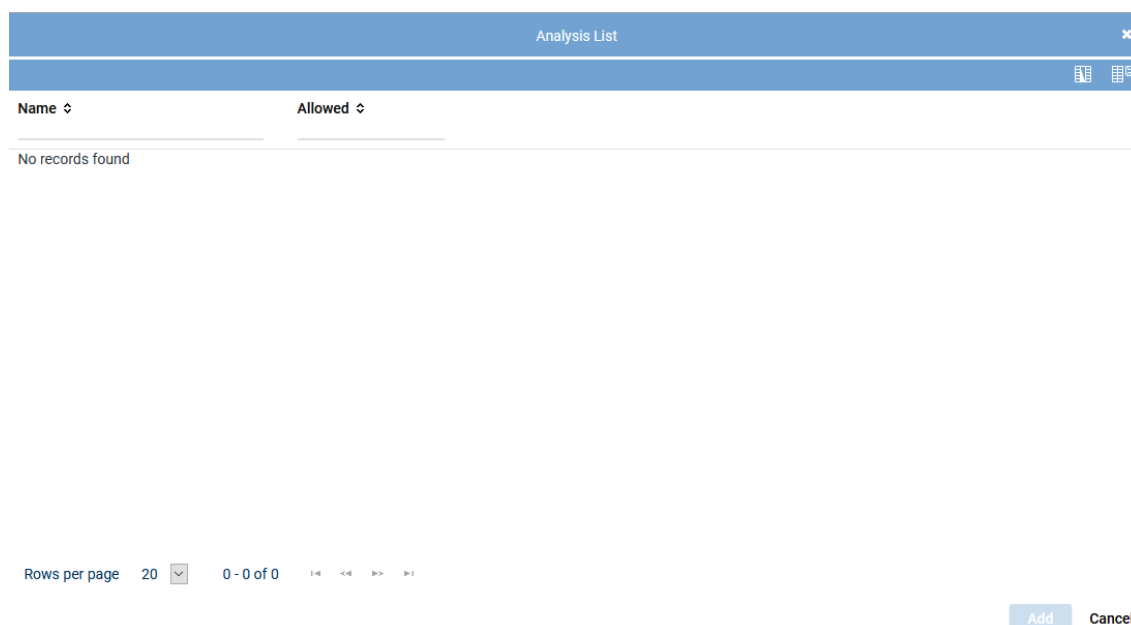



Fig. 5: Add search criteria related to audio analysis (example)

2. By clicking on the icon , the selection is deleted from the list.
3. To add a criterion, select the respective element and click on the button *Add*. To discard the entries and return to the previous menu, click on the button *Cancel*.

4. To activate a criterion from the sub-menu *Emotions*, check the particular check box.
5. To search for the percentage of *silence in session* and/or *silence in track*, select the corresponding search criteria (percentages of 0-100 or possible).

<i>Silence in session</i>	Searches for all sessions in which the percentage of silence is equal to, larger than or smaller than the defined percentage (0-100).
<i>Silence in track</i>	Searches for all sessions in which the percentage of silence is equal to, larger than or smaller than the defined percentage (0-100) in one or several of its tracks.

3.1.1.2 SCREENminer search criteria



SCREENminer search criteria are only displayed if the license for SCREENminer is available.

All values that you can select here are based on the rules which have to be configured in the SCREENminer Rules module in advance.

SCREENminer search criteria allow you to search for specific work items for which reference processes have been defined. You can combine the SCREENminer search criteria with the available general search criteria which are based on the additional data provided by sessions.



Only work items which have been recorded after the reference process has been activated can be compared with the reference process.

The following aspects can be assessed:

- Duration of entire processes
- Processing time of single tasks
- Order of the individual tasks in a process

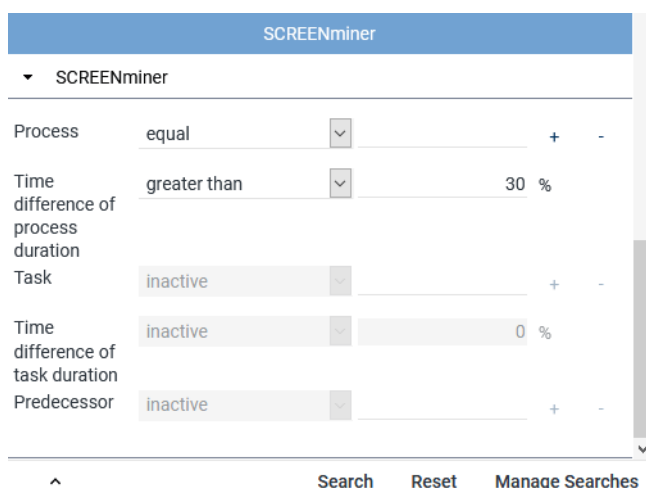




Fig. 6: SCREENminer search criteria (example)

The following options are available:

<i>Process</i>	Select which process you would like to assess.
<i>Time difference of process duration</i>	This option allows you to additionally assess the processing time of the entire process. Enter the value of the difference in percent.
<i>Task</i>	This option allows you to additionally check whether a certain task has been completed. This option is only active if a process has been selected previously.

<i>Time difference of task duration</i>	<p>This option allows you to additionally assess the processing time of individual tasks. Enter the value of the difference in percent.</p> <p>This option is only active if a task has been selected previously.</p>
<i>Predecessor</i>	<p>This option allows you to additionally check whether the individual tasks in a process follow the defined order.</p> <p>This option is only active if a task has been selected previously.</p>

1. Select one or several comparison parameters from the drop-down list.
2. To add a process or a task, click on the icon  .
Click on the icon  to delete the selected element again.

SCREENminer Process

Name

No records found

Rows per page

20

0 - 0 of 0

<<

>>

Add

Cancel

Fig. 7: Select process or task (example)

3. Click on the button *Add* to apply the process or the task.

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

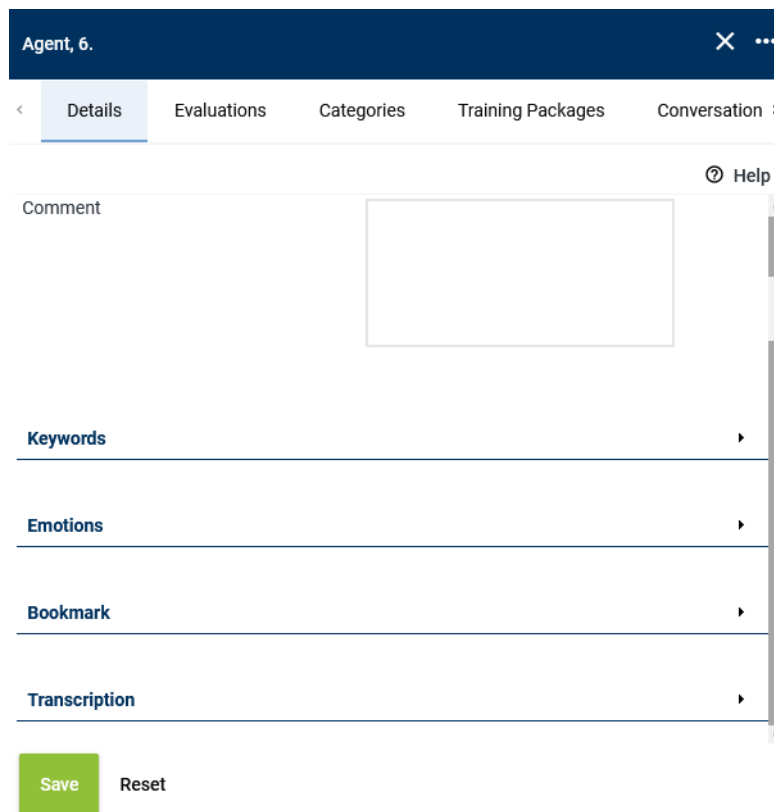


Fig. 8: Detail view - Sessions (example)

The detail view consists of the following tabs:

- **Details**
Here, you can display and edit detailed information about the selected audio analysis job. See [chapter "Tab Details", p. 20](#).
- **Evaluations**
Here, you can display the evaluations of the session. See [chapter "Tab Evaluations", p. 21](#).
- **Categories**
Here, you can assign categories to the session. See [chapter "Tab Categories", p. 23](#)
- **Training Packages**
Here, you can assign training packages to the session. See [chapter "Tab Training Packages", p. 24](#).
- **Conversation Details**
Shows detailed information about the selected conversation. See [chapter "Tab Conversation Details", p. 24](#)
- **Participants**
Shows participant information about the selected conversation. See [chapter "Tab Participant", p. 25](#)
- **Additional Data**
Shows additional data which has been tagged to the selected session. See [chapter "Tab Additional Data", p. 26](#).

To change tabs, click on the tab you would like to display.

You can change tabs without buffering without risking the loss of your settings.

1. To save the entries, click on the button *Save* in the detail view.
To reset the entries, click on the button *Reset* in the detail view.

4.1

Tab Details

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

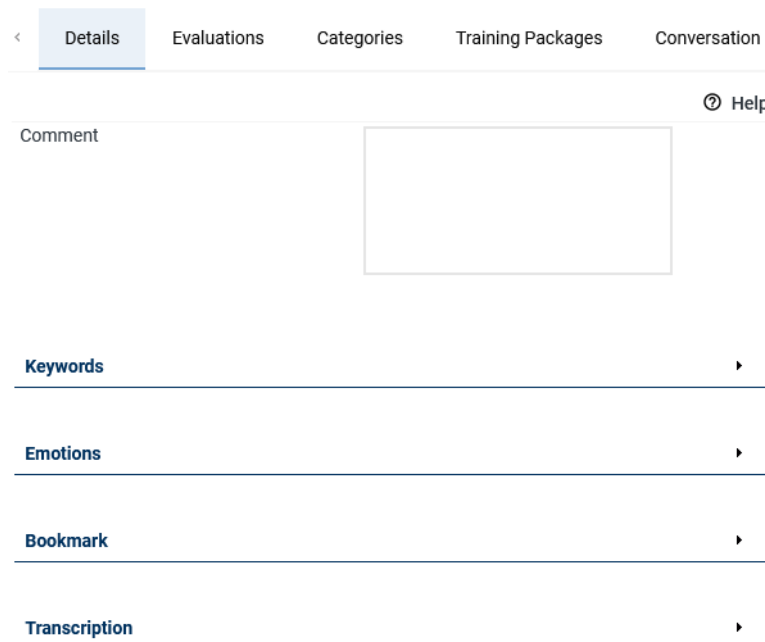


Fig. 9: Tab Details (example)

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

Group field Keywords



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

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

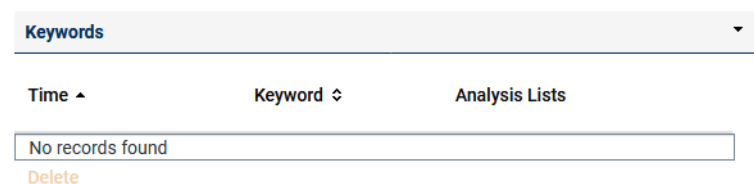


Fig. 10: Group field Keywords

Delete	Deletes the selected hit from the list.
---------------	-----------------------------------------

Group field Emotions



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

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

Emotions	
Time ▲	Emotions ⇅
No records found	
Delete	

Fig. 11: Group field Emotions

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

Group field bookmark



This option is not available for all conversation types.

Here, you see bookmarks that have been added to the selected session in the Replay module.

Bookmark	
Time ⇅	Bookmark ⇅
No records found	
Delete	

Fig. 12: Group field Bookmark

Delete	Removes the selected tagging from the list.
------------------------	---------------------------------------------

Group field Transcription



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

Here, you can see the transcriptions of the audio content of the session.

Transcription		
Time ⇅	Speaker ⇅	Content ⇅
No records found.		

Fig. 13: Group field Transcription

4.2

Tab Evaluations

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





< Details		Evaluations	Categories	Training Packages	Conversation >
<div> <div><</div> <div>   </div> </div>					
Created By ⇅		Result ⇅			
Agent, 10.		55.0			

Fig. 14: Tab Evaluations

	View	Opens a window in which you can view the selected evaluation. See chapter "View evaluation", p. 22.
	Print evaluation	Prints the content of the selected evaluation. See chapter "Print evaluation", p. 22.

4.2.1 View evaluation

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

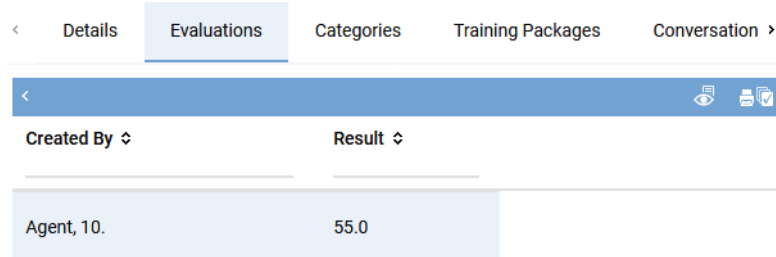



Fig. 15: Tab Evaluations

2. Click on the icon  (*View*).
⇒ The window with the evaluation appears.

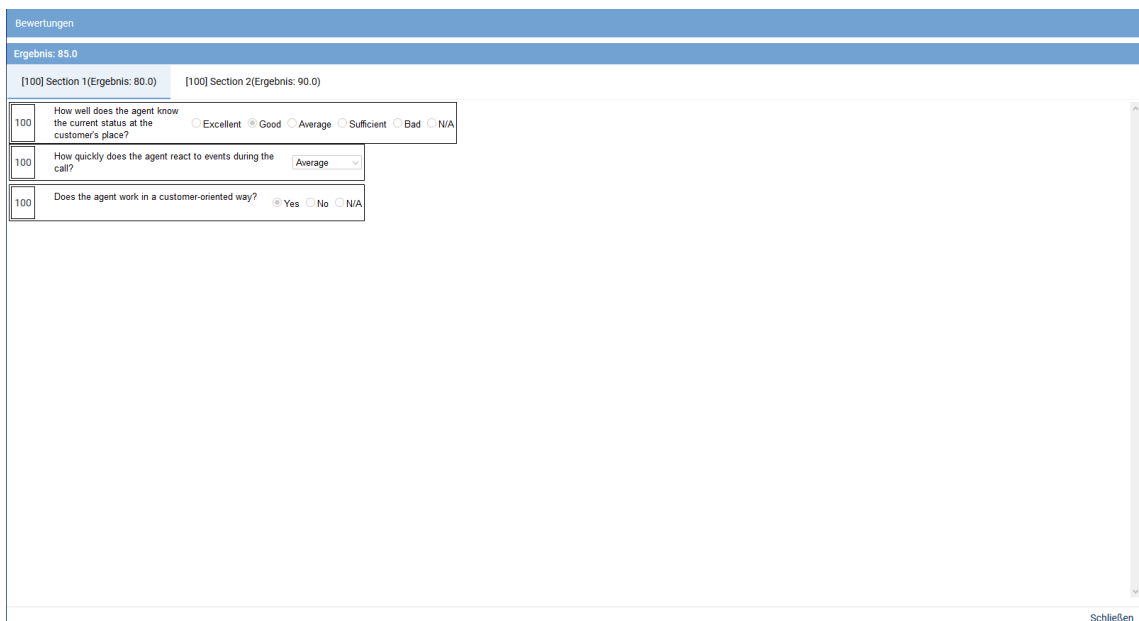



Fig. 16: Evaluation (example)

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

4.2.2 Print evaluation

This function allows printing the selected evaluation.

1. Click on the icon  (*Print evaluation*).
⇒ The print preview appears.
2. To cancel the printing process, click on the button *Cancel*.
To continue the printing process, click on the button *Print*.
⇒ The window *Print* appears.

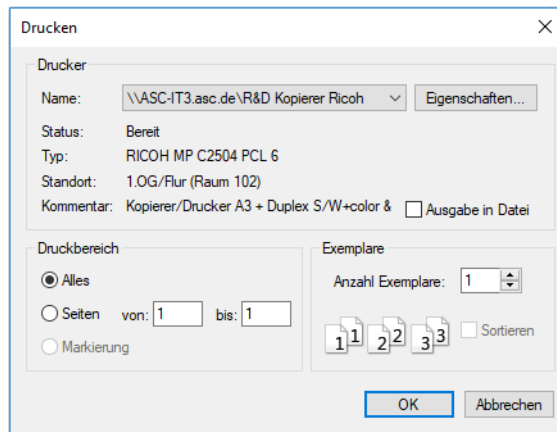


Fig. 17: Print (example)

3. Set the respective print options.
4. To start printing, click on the button **OK**.
To cancel the printing process, click on the button **Cancel**.

4.3 Tab Categories

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

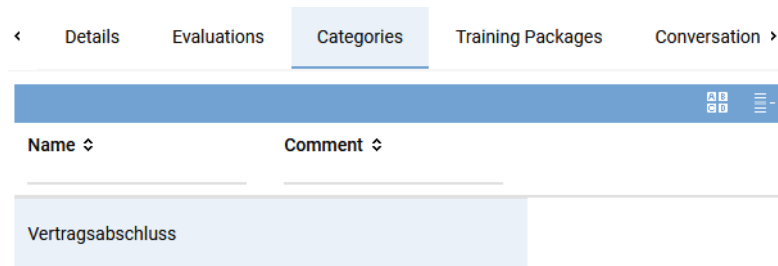





Fig. 18: Tab Categories

	Administrate categories	<p>Opens a window in which you can create new categories and select or delete already existing categories.</p> <p>See</p> <ul style="list-style-type: none"> chapter "Create and add new category", p. 63 chapter "Assign existing category", p. 66 chapter "Delete category", p. 71 <p>In addition, you can view the assigned conversations of a category and add keywords in this window.</p> <p>See</p> <ul style="list-style-type: none"> chapter "View and filter assigned conversations", p. 67 chapter "Add and edit keywords", p. 69
	Remove	<p>Deletes the assignment of the selected category.</p> <p>See chapter "Remove category assignment", p. 23.</p>

4.3.1 Remove category assignment

1. Select the tab *Categories* (see [chapter "Tab Categories", p. 23](#)).
2. To remove the assignment of a category, select the category in the list and click on the icon  (*Remove*).

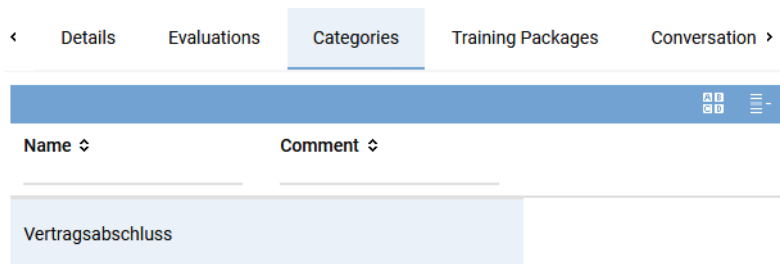


Fig. 19: Remove category assignment

4.4 Tab Training Packages

Here, you can assign, create, and accept training packages. Depending on the right of the user, different options can be chosen.

A training package which is created here will be listed in the Training Package module upon saving. The training package is assigned to the agent of the session.

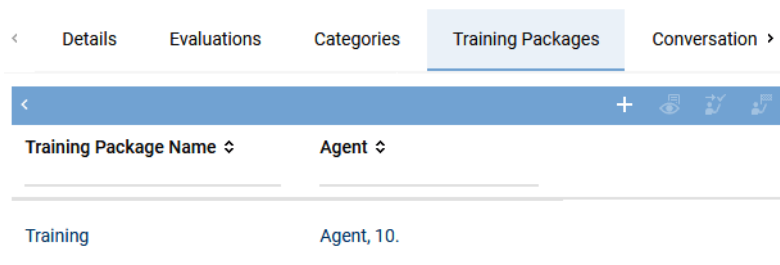






Fig. 20: Tab Training Packages

	Create/Assign	Here, you can create or assign a training package. You have 2 options: <ul style="list-style-type: none"> • <i>Create/Assign</i>. See chapter "Assign existing training package", p. 46 • <i>Create Ad Hoc Training Package</i>. See chapter "Create and assign training package", p. 48
	View training package	Here, you can view a training package which is already in the selection. See chapter "View training package", p. 49 .
	Accept training package	Here, you can accept a training package. See chapter "Accept training package", p. 50 . (This function is only available for the agent who has been assigned the training package.)
	Finalize training package	Here, you can finalize a training package. See chapter "Finalize training package", p. 50 . This option is only available if the training package has been started before.



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

4.5 Tab Conversation Details

Shows detailed information about the selected conversation.

<

Training Packages

Conversation Details

Participants

Additional Data >

Conversation Information

Start time

12/16/2018 10:10:14 PM

End time

12/16/2018 10:11:04 PM

Duration

00:00:50:680

Conversation direction

Unknown

Conversation ID

ff4b296c-2ef3-49dd-9b10-6d1c7208388d

DTMF sequence

Conversation type

CALL

Statistics of the Conversation

Number of ringing sections

3

Duration of ringing sections

00:00:01:125

Number of hold sections

0

Duration of hold sections

00:00:00:000

Number of connected sections

3

Duration of connected sections

00:00:50:399

Number of failed callbacks

0

Number of successful callbacks

0

Conversation ID of callback request

Calling Party Information

Calling party PBX Agent ID

Calling party phone number

user5

Fig. 21: Tab Conversation Details (example)

A description of the displayed information can be found in [chapter "Main view", p. 10](#). The displayed information in the detail view depends on the configuration of the columns in the main view.

4.6 Tab Participant

Shows participant information about the selected conversation.

<

Training Packages

Conversation Details

Participants



Additional Data >

<

Type ↕	Phone Number ↕	PBX Agent ID ↕	Time Slot ID
[*]	user6		
[*]	user10		
[*]	user5		

Fig. 22: Tab Participants (example)

The following functions are available:

	No sorting
	Descending sort sequence

Ascending sort sequence

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

4.7 Tab Additional Data

Here, you can display and edit the additional data of the selected session.

<
Training Packages
Conversation Details
Participants
Additional Data
>

Additional Data

Universal Call ID	a410b70750f5481596ec29df94236ded
Comment	NM8K6W7S
User name	
Customer name	
Call Center ID	
Business Unit	
Department	
Department Key	
To Party	
ACD Group Number	

Save
Reset

Fig. 23: Tab Additional Data (example)

1. To edit an entry, click in the field you would like to edit.
2. Make the required changes.
3. To save the entries, click on the button *Save*.
To discard the entries, click on the button *Reset*.

5 **Replay module**

The Replay module serves to replay conversations. Conversations which are supposed to be replayed must be selected in the main view and loaded into the Replay module.

If conversations with screen or camera recordings are loaded into the Replay module, the window of the Video Viewer opens automatically for replaying the [video recording](#), see [chapter "Video Viewer", p. 40](#). The replay functions are executed synchronously for the conversation in the Replay module and for the video recording in the Video Viewer.

If conversations with chat texts or text messages (SMS or SDS) are loaded into the Replay module, the window of the Message Viewer opens automatically for displaying the chat texts or the text messages recording, see [chapter "Message Viewer", p. 43](#).

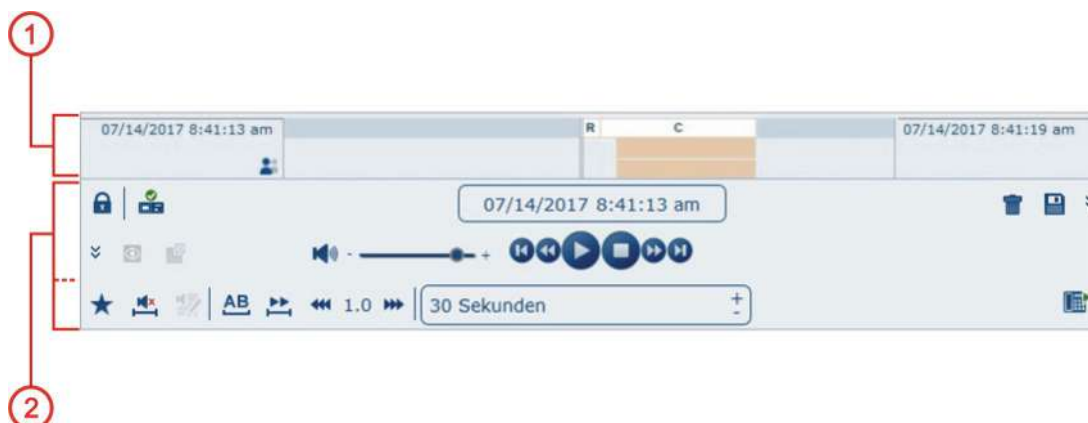




Fig. 24: Welcome screen (example)

1	Replay bar	Shows the loaded conversations, see chapter "Replay bar", p. 27 .
2	Functionality bar	Contains functionalities for the loaded conversations in the replay bar, see chapter "Functionality bar", p. 31 .

The configured settings in the functionality bar of the Replay module such as e. g. *Expanded view*, *Simple view*, *Lock element* etc., are automatically saved for the logged-in user. The settings of the Replay module are also applied when used in other modules or after a logoff/login.

5.1 **Replay bar**

The replay bar shows the loaded conversations.

In the replay bar, there are 2 different views: the full view and the compressed view. To switch the view, go to the functionality bar on the right and click on the icon  (Switch to full view) or  (Switch to compressed view).

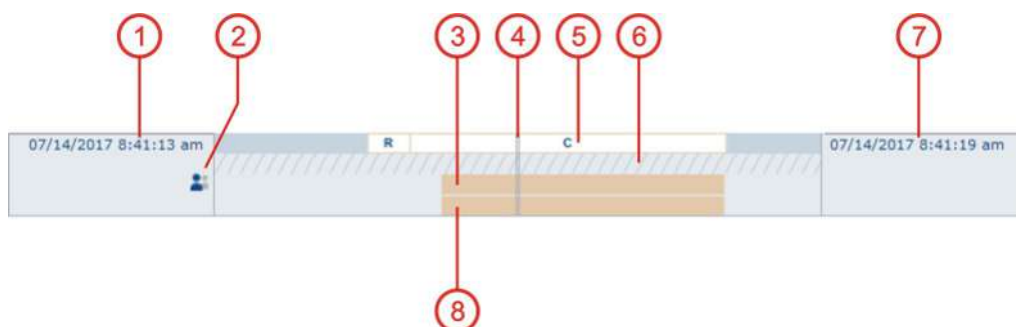


Fig. 25: Replay bar in the full view

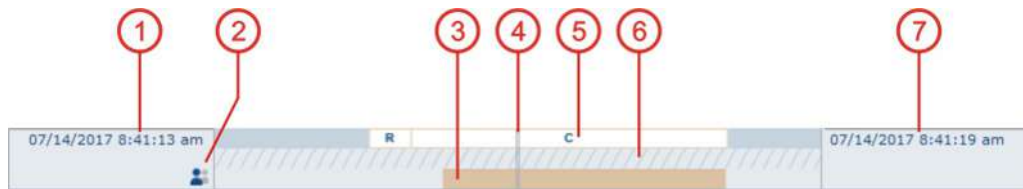







Fig. 26: Replay bar in compressed view

- 1 Shows the start time of the loaded conversation.
If several conversations have been loaded in 1 track, the start time of the earliest conversation is displayed here.
- 2 Displays information about the conversation participants.
The information is only visible when the replay bar is displayed in full view.
 -  = internal participants
 -  = external participants
 -  = mixed track with internal and external participants
 -  = unknown participants
 -  = screen recording
 To display the phone numbers of the participants in one track, move the mouse cursor across the participants icon.
- 3 Displays track 1 of a loaded conversation. For further information see [chapter "Display of the loading states", p. 29](#).
- 4 Shows the replay position.
To change the current replay position of the loaded conversation, you have 2 possibilities:
 1. Click on the respective replay position.
 2. Click on a track, hold the mouse key down and drag the cursor to the left or to the right.
- 5 Shows the sections of the conversation.
The following sections are possible:
 - R = Ringing (a connection is being established)
 - C = Connected (at least 2 participants are calling each other)
 - H = Hold (a participant is on hold)
 - Q = Queued (a participant has been queued)
 - W = Wrap-up (wrap-up time)
- 6 Shows tagging and audio analysis data (e. g. found keywords).
The line is only displayed if information is available.
- 7 Shows the end time of the loaded conversation.
If several conversations have been loaded in 1 track, the end time of the last conversation is displayed here.
- 8 Displays track 2 of a loaded conversation. For further information see [chapter "Display of the loading states", p. 29](#).

5.1.1 Full view

In the full view, all tracks for voice and screen recording which belong to the loaded conversation are displayed in the replay bar of the Replay module.

When replaying stereo recordings with several internal participants, an echo effect occurs because the voices of some participants have been recorded several times. To avoid the echo effect, tracks with double recording have to be muted.

5.1.2 Compressed view

In the compressed view, no individual tracks for voice and screen recording are displayed in the replay bar of the Replay module. All recordings of a loaded conversation are combined in one group within one track.

In the compressed view, double recordings are suppressed automatically to avoid echo effects. If errors occur during recording, display the replay bar in full view and mute the single tracks manually.

5.1.3 Display of the loading states

The loaded conversation is assigned a basic color from a defined color palette.

The replay bar of the conversation shows its loading state. In the following, you find a description of the possible loading states.

1. Basis color (e. g. light brown) = Meta data loaded completely.

⇒ The conversation can be replayed.



Fig. 27: Meta data loaded completely

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

⇒ The conversation cannot be replayed.



Fig. 28: Meta data for the recording is missing

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

⇒ The conversation cannot be replayed.



Fig. 29: Defective packet in the meta data of the recording (full view)

4. Red dotted basic color (only in full view) = Packet in the meta data of the recording is missing.

⇒ The conversation cannot be replayed.



Fig. 30: Missing packet in the meta data of the recording (full view)

5. Red exclamation mark (only in compressed view) = Audio data of the recording is defective or packet in the meta data of the recording is missing.

For a more precise specification of the diagram change to the full view.

⇒ The conversation cannot be replayed.



Fig. 31: Defective or missing packet in the meta data of the recording (compressed view)

6. Basic color, light (e. g. ocher, light) = Data buffer empty.

Basic color (e. g. ocher) = Data buffer loaded.

⇒ The conversation can be replayed. An empty data buffer is reloaded automatically. If the server connection is slow, the replay may stop. As soon as the data buffer has been reloaded, the replay continues.

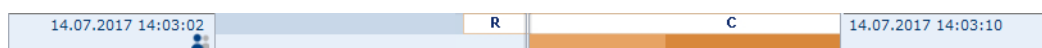


Fig. 32: Data buffer empty/loading

7. Red = Data buffer not loaded completely.

⇒ The conversation is defective and cannot be replayed.

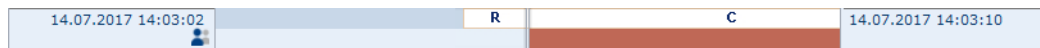


Fig. 33: Data buffer not loaded completely

8. Basis color (e. g. light brown) = Meta data loaded completely.

Red = Data buffer not loaded completely.

⇒ In the basic color section, the conversation can be replayed.

⇒ In the red section, the conversation is defective and cannot be replayed.



Fig. 34: Data buffer not loaded completely

9. Purple = Packet is muted during the recording.

⇒ The conversation can be replayed. There is nothing to be heard since no audio data has been recorded. Packets which have once been muted are muted permanently and cannot be changed afterwards.

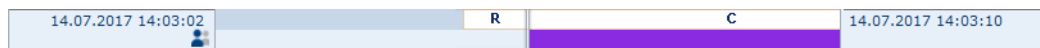


Fig. 35: Packet is muted during the recording

10. Basis color (e. g. light brown) = Meta data loaded completely.

Purple, light = Conversation section muted

⇒ The conversation can be replayed. In the muted conversation section, silence is replayed. The muted conversation section can be deleted so that the audio data can be replayed.



Fig. 36: Conversation section muted

11. Gray = The recording contains data which is not supported.

⇒ The conversation cannot be replayed.

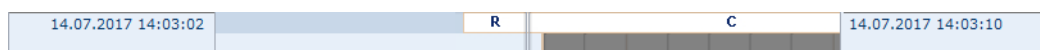


Fig. 37: The recording contains data which is not supported.

5.1.4 Display of detected emotions

If an emotion detection job has found emotions in the conversation, they are displayed in the loaded conversation with color markings. The position and length of the color markings mirror the occurrence and duration of the sentiment in the conversation.



Fig. 38: Emotions detected in a conversation (example)

In the following, you find a description of the possible color markings:

- Light blue indicates sections of silence.
- Red indicates high-volume sections.
- Yellow indicates sections of cross talk or of massive cross talk.
- Green indicates unsuspecting audio sections.

5.1.5 Displaying spotted keywords

If a keyword spotting job has found keywords in the conversation, they are displayed in the loaded conversation as black triangles. The position and length of the triangles mirror the occurrence and duration of the keyword in the conversation.



Fig. 39: Spotted keywords in a conversation (example)

If the replay reaches the triangle, a replay information with the details of the spotted keyword is displayed.











Fig. 40: Replay information with details of spotted keyword (example)









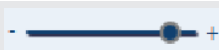





5.2 Functionality bar







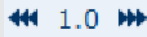





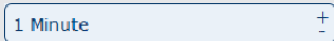

The functionality bar contains functionalities for the loaded conversations in the replay bar.

5.2.1 Icons

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



	<i>Play/ Pause</i>	Starts the replay. If several conversations have been loaded into the Replay module, the conversations may be replayed in parallel if the recording times overlap.
		Pauses the replay.
	<i>Stop</i>	Stops the replay.
	<i>Rewind</i>	Jumps back 5 seconds from the current replay position.
	<i>Back</i>	Jumps to the start of the current or of the previous conversation.
	<i>Fast-forward</i>	Jumps ahead 5 seconds from the current replay position.
	<i>Next</i>	Jumps to the start of the next conversation.
	<i>Lock element</i>	Shows that the lock for the Replay module has been deactivated. As a result, several conversations can be loaded into the Replay module.

		Note: In principle, you can load several video recordings into the Video Viewer. However, you can only replay one of them at any given moment.
		Shows that the lock for the Replay module has been activated. As a result, only one conversation can be loaded into the Replay module.
	<i>Reconnect to the replay component</i>	Refreshes the server connection.
	<i>Display video window</i>	Shows the Video Viewer in the main view of the application.
	<i>Hide video window</i>	Shows the main view of the application. The Video Viewer integrated into the main view is hidden.
	<i>Detach Video Viewer</i>	Displays the Video Viewer in its own window.
	<i>Attach Video Viewer</i>	Closes the window of the Video Viewer.
	<i>Unmute/Mute</i>	Shows that the speaker for the conversation has been activated.
		Shows that the speaker for the conversation has been deactivated.
	<i>Volume</i>	Adjusts the general replay volume. To change the volume, click on the slider, hold the mouse key down and move the slider to the left or to the right.
	<i>Clear playlist</i>	Removes all loaded conversations from the Replay module.
	<i>Export all loaded elements</i>	Saves the audio data of the loaded conversations as WAVE or MP3 file and the corresponding additional conversation data as CSV file on the hard disk of your computer, see chapter "Export all loaded elements", p. 34 .
	<i>Create new bookmark</i>	Sets a bookmark or marks the beginning of a conversation section at the current replay position, see chapter "Create new bookmark", p. 35 .
		Sets a bookmark or marks the end of a conversation section at the current replay position. You can enter a comment for the marked area between the 2 associated bookmarks, see chapter "Create new bookmark", p. 35 .
	<i>Create new mute notification</i>	Marks the beginning of a conversation section at the current replay position in order to mute selected participants, see chapter "Create new mute notification", p. 38 .



		Marks the end of a conversation section at the current replay position in order to mute selected participants, see chapter "Create new mute notification", p. 38.
	<i>Loop</i>	Marks the beginning of a replay loop at the current replay position, see chapter "Mark replay loop", p. 40.
		Marks the end of a replay loop at the current replay position, see chapter "Mark replay loop", p. 40.
		Removes the taggings of the replay loop, see chapter "Mark replay loop", p. 40.
	<i>Skip silence</i>	Shows that the automatic skipping of times of silence sections in a conversation and of mute sections between individual conversations has been deactivated.
		Shows that the automatic skipping of times of silence sections in a conversation and of mute sections between individual conversations has been activated. The silence sections found by an emotion detection job are skipped during the replay of the conversation. If several conversations are loaded into the Replay module, then the mute sections between the individual conversations are skipped during replay, too.
		Shows the current replay speed. The replay speed can be adjusted between 0.5 and 2.0. To reduce the replay speed, click on the icon  <i>Reduce replay speed.</i> To increase the replay speed, click on the icon  <i>Increase replay speed.</i>
	<i>Replay via phone</i>	Shows that the conversation replay via phone has been deactivated.
		Shows that the conversation replay via phone has been activated. To replay loaded conversations, click on the icon  (Play).
		Shows the time window for the loaded conversations. You can enter the time window in 25 steps from 1 second to 14 days. There are 2 possibilities to change the time window: 1. On the right in the time window, click on + or -. 2. Turn the mouse wheel while the mouse cursor is located above the replay track.
		Shows the current replay position. Click into the display field to switch from absolute to relative time display and vice versa. The absolute time display shows the date and the time

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

Icons in the functionality bar on the right

	Expanded view	Switches the replay bar to full view.
	Simple view	Switches the replay bar to compressed view.

Icons in the functionality bar on the left

	Display toolbar	Shows all icons in the functionality bar
	Hide toolbar	Partly hides the icons in the functionality bar.



Not all described icons exist in every module and application.

5.2.2 **Export all loaded elements**

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

⇒ The following window appears:

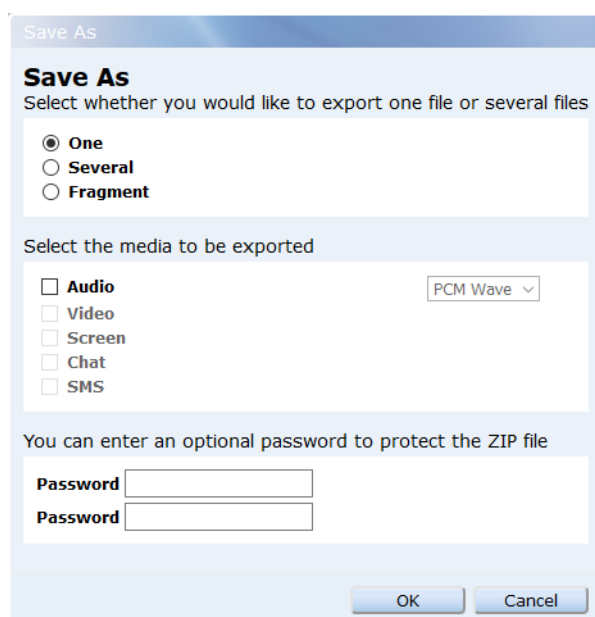


Fig. 41: Save as

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

Single	Mixes all recordings of one or several conversations in one file. NOTICE! If you select several conversations, the gap between them is filled with silence. Selecting conversations with a large gap between them results in very large WAVE files. Therefore, make sure to only select conversations which are not separated by a large gap.
Several	Creates its own file for each recording to be saved.
Fragment	Only data contained in the set loop are saved. All other data is discarded.
Audio	Saves the audio data. Select the audio format from the drop-down list:

	<ul style="list-style-type: none"> • <i>PCM Wave</i> With PCM, the output file is not compressed and can be replayed by almost any player. This method requires a lot of storage capacity. • <i>MP3</i> With MP3, the output file is compressed and can be replayed by almost any player. When using MP3, less storage space is required for high-quality recordings than when exporting conversations in WAVE format.
Video	Saves the video data . Video is exported in MP4 format with video codec H.264. If the conversation contains more than one stream, only the first stream is exported.
Screen	Saves the screen recordings.
Chat	Saves the chat text.
SMS	Saves the SMS data.
Password	Protects the ZIP file with a password.

3. Click on the button **OK**.

⇒ The following window appears:

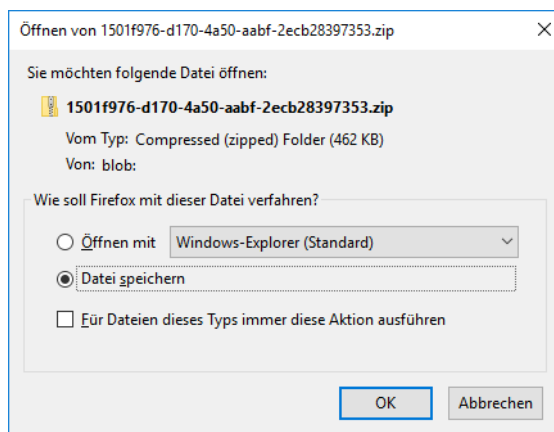


Fig. 42: Save conversations

4. Select the option **Save File**.

5. Click on the button **OK**.

⇒ The elements are exported to the local download directory in a ZIP file.

The ZIP file contains the following files:

The audio data is saved as **WAVE** or **MP3** file(s).

Audio data and screen recordings are saved as MP4 file(s).

Video data is saved as MP4 file(s).

Screen data is saved as MP4 file(s).

The corresponding meta data is saved in the same directory as CSV file(s) under the same file name.

Chat texts are saved as **XML** file(s).

SMS data is saved as **XML** file(s).

5.2.3 Create new bookmark

The intention is not to create only one single bookmark. The beginning and the end of a conversation section have to be marked with a new bookmark. You can enter a replay comment for this tagged conversation section between 2 bookmarks.

In a conversation, several conversation sections can be marked with bookmarks and commented.





It is not possible to delete only 1 bookmark from a tagged conversation section.

5.2.3.1 **Create bookmarks with replay comment**



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

1. To mark the beginning of a conversation section for a replay comment, click on the icon  (*Create new bookmark*).
 2. To mark the end of a conversation section for a replay comment, click on the icon  (*Create new bookmark*).
- ⇒ The following window appears:

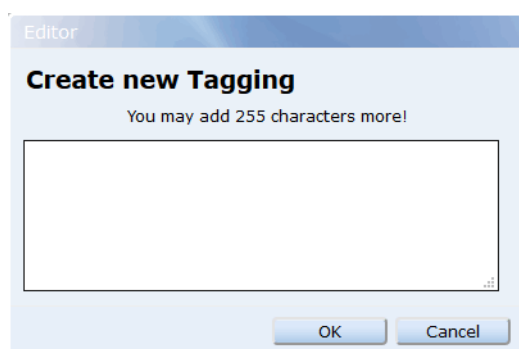
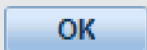



Fig. 43: Tagging editor

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

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



Fig. 44: Tagging editor with entered comment (example)

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



Fig. 45: Conversation with tagged conversation section (example)

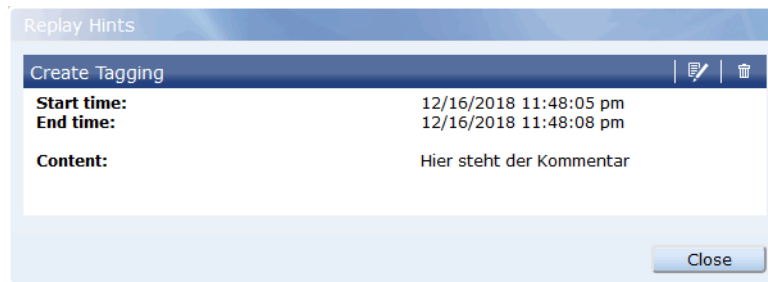


Fig. 46: Displayed information details (example)

5.2.3.2 Edit bookmarks with replay comment

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

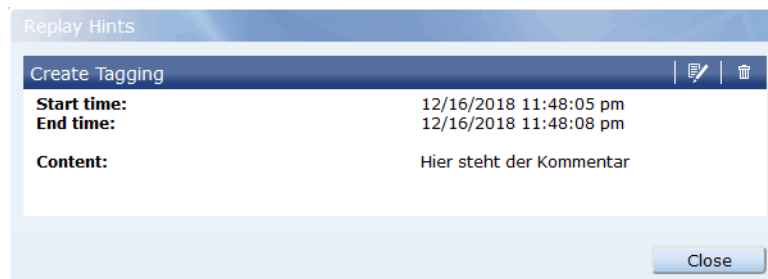



Fig. 47: Displayed information details (example)

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

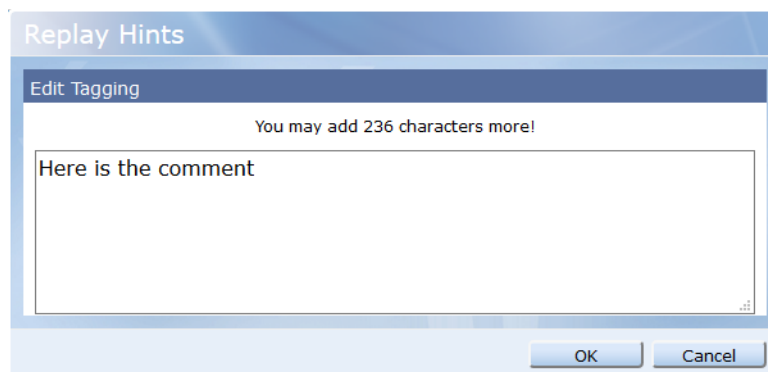




Fig. 48: Edit tagging (example)

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

3. Edit the replay comment.
4. To save the entries, click on the button *OK*.

5.2.3.3 Delete bookmarks with replay comment

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

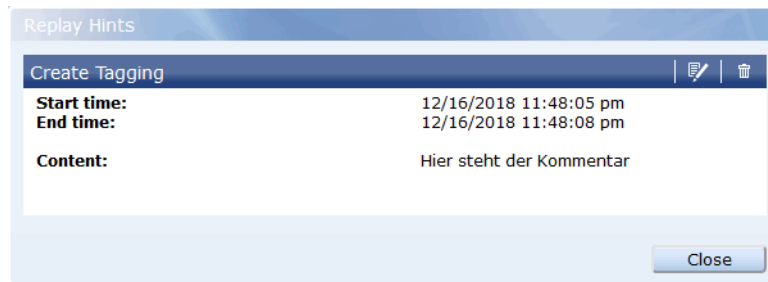



Fig. 49: Displayed information details (example)

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

5.2.4 Create new mute notification

The intention is not to create only one single mute notification. The beginning and the end of a conversation section have to be marked with a new mute notification. This tagged conversation section between 2 mute notifications can be muted for selected participants.

In a conversation, several conversation sections can be marked with mute notifications and selected participants can be muted.





It is not possible to delete only one mute notification from a tagged conversation section which marks the beginning or the end.

5.2.4.1 Mute conversation section



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

1. To mark the beginning of a conversation section for the muting of selected participants, click on the icon  (*Create new mute notification*).
2. To mark the end of a conversation section for the muting of selected participants, click on the icon  (*Create new mute notification*).
⇒ The following window appears:

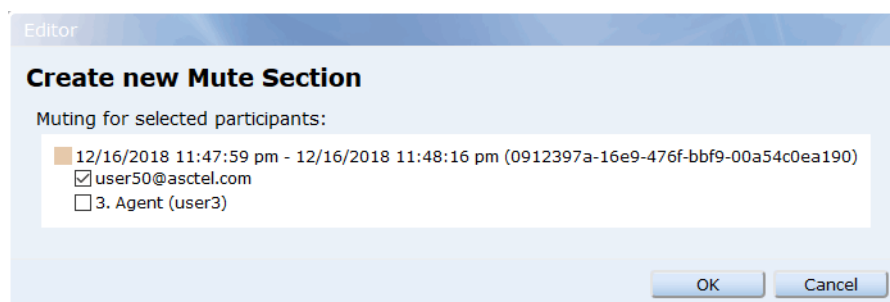
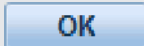



Fig. 50: Muting for selected participants (example)

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

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

- ⇒ The muted conversation section is displayed as a gray area in the replay bar.
- ⇒ When replaying the conversation, the mute section details are displayed in the area of the muting.

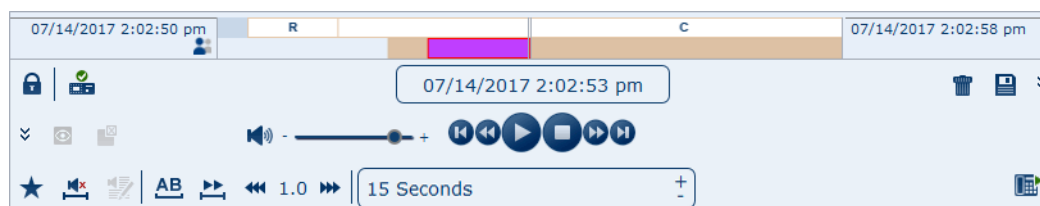


Fig. 51: Conversation with muted conversation section (example)

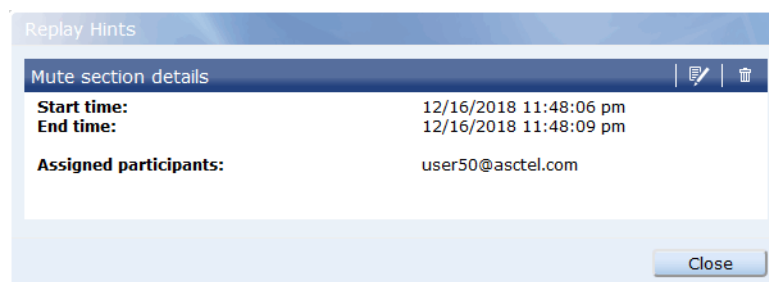


Fig. 52: Displayed mute section details (example)

5.2.4.2 Edit muted conversation section

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

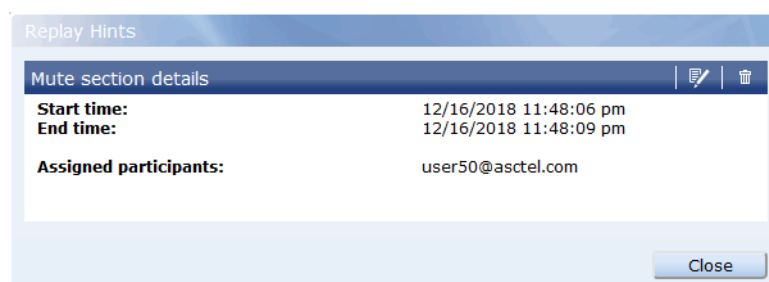



Fig. 53: Mute Section Details (example)

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

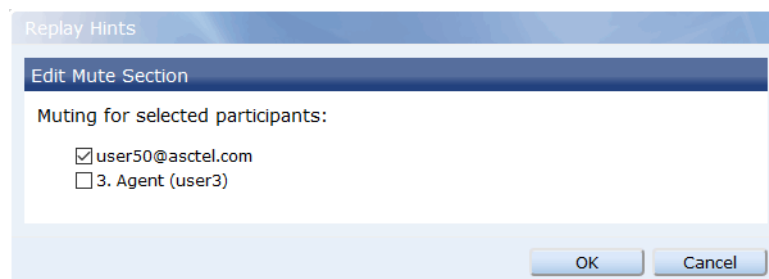
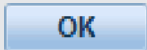



Fig. 54: Edit mute section (example)

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

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

5.2.4.3 Delete muted conversation section

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

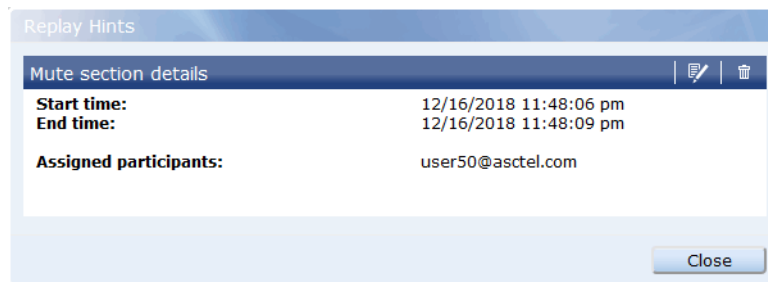



Fig. 55: Mute Section Details (example)

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

5.2.5 Mark replay loop




1. To mark the beginning of a replay loop at the current replay position, click on the icon  (Loop).
2. To mark the end of a replay loop at the current replay position, click on the icon  (Loop).
⇒ When the replay is started, the area between the marks is replayed in an endless loop.
3. To remove the marks of the replay loop, click on the icon  (Loop).



Fig. 56: Conversation with replay loop

5.3 Video Viewer




The Video Viewer serves to replay screen and camera recordings (video recordings).




In principle, you can load several video recordings into the Video Viewer. However, you can only replay one at any given moment.



Fig. 57: Video Viewer (example)

1	Option bar	Contains settings for displaying video recordings, see chapter "Option bar", p. 42.
2	Main view	Shows the Video recording .
3	Replay bar	Shows the loaded video recordings, see chapter "Replay bar", p. 42.
4	Functionality bar	Contains functionalities for the loaded conversations in the replay bar, see chapter "Icons", p. 31. In the Video Viewer, not all icons of the Replay module are available.
5	 (Minimize)	Minimizes the on-screen display to the program icon in the taskbar.
6	 (Maximize)	Maximizes the on-screen display to full-screen size.
	 (Reconstruct)	Reduces the on-screen display to the most recently selected reduced window size.

- 7  Closes the window of the Video Viewer.
(Close)

5.3.1 Option bar

The option bar contains settings for displaying video recordings.



Fig. 58: Option bar

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

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

5.3.2 Replay bar

The replay bar shows the loaded video recordings.

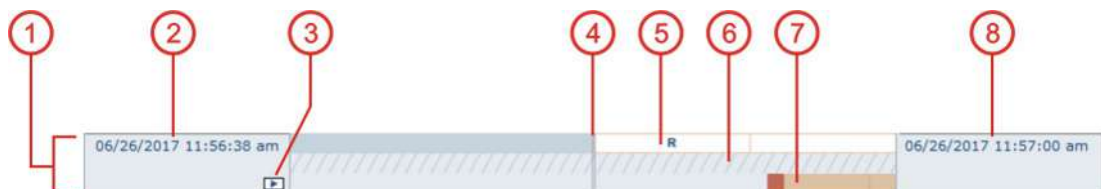


Fig. 59: Replay bar

- Shows the track of a loaded [video recording](#).
- Shows the start time of the loaded conversation.
If several conversations have been loaded in 1 track, the start time of the earliest conversation is displayed here.
- Shows that this is the track of a [video recording](#).
- Shows the replay position.
To change the current replay position of the loaded conversation, you have 2 possibilities:
 - Click on the respective replay position.
 - Click on a track, hold the mouse key down and drag the cursor to the left or to the right.
- Shows the sections of the conversation.
The following sections are possible:
 - R = Ringing (a connection is being established)

	<ul style="list-style-type: none">• C = Connected (at least 2 participants are calling each other)• H = Hold (a participant is on hold)• Q = Queued (a participant has been queued)• W = Wrap-up (wrap-up time)
6	Shows tagging and audio analysis data (e. g. found keywords). The line is only displayed if information is available.
7	Shows the conversation. For further information see chapter "Display of the loading states", p. 29 .
8	Shows the end time of the loaded conversation. If several conversations have been loaded in 1 track, the end time of the last conversation is displayed here.

5.4 **Message Viewer**

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

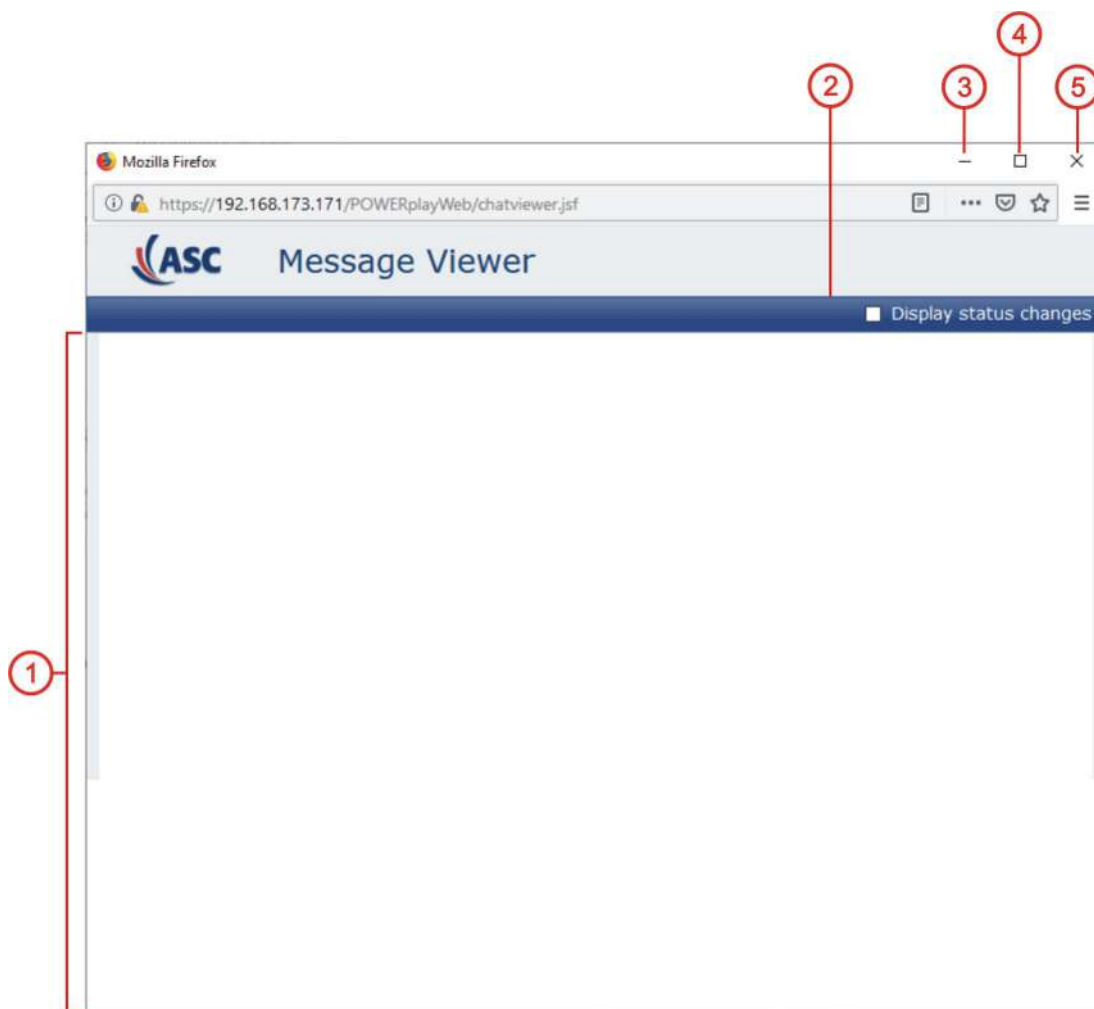






Fig. 60: Message Viewer

1	Main view	Displayed chat texts or text messages. See chapter "Main view", p. 44 .
2	<i>Display status changes</i>	<input checked="" type="checkbox"/> = Displays the status changes. <input type="checkbox"/> = Does not displays the status changes.
3		Minimizes the on-screen display to the program icon in the taskbar.

	(Minimize)	
4		Maximizes the on-screen display to full-screen size.
	(Maximize)	
		Reduces the on-screen display to the most recently selected reduced window size.
	(Reconstruct)	
5		Closes the window of the Message Viewer.
	(Close)	

5.4.1

Main view

The main view displays chat texts or text messages.

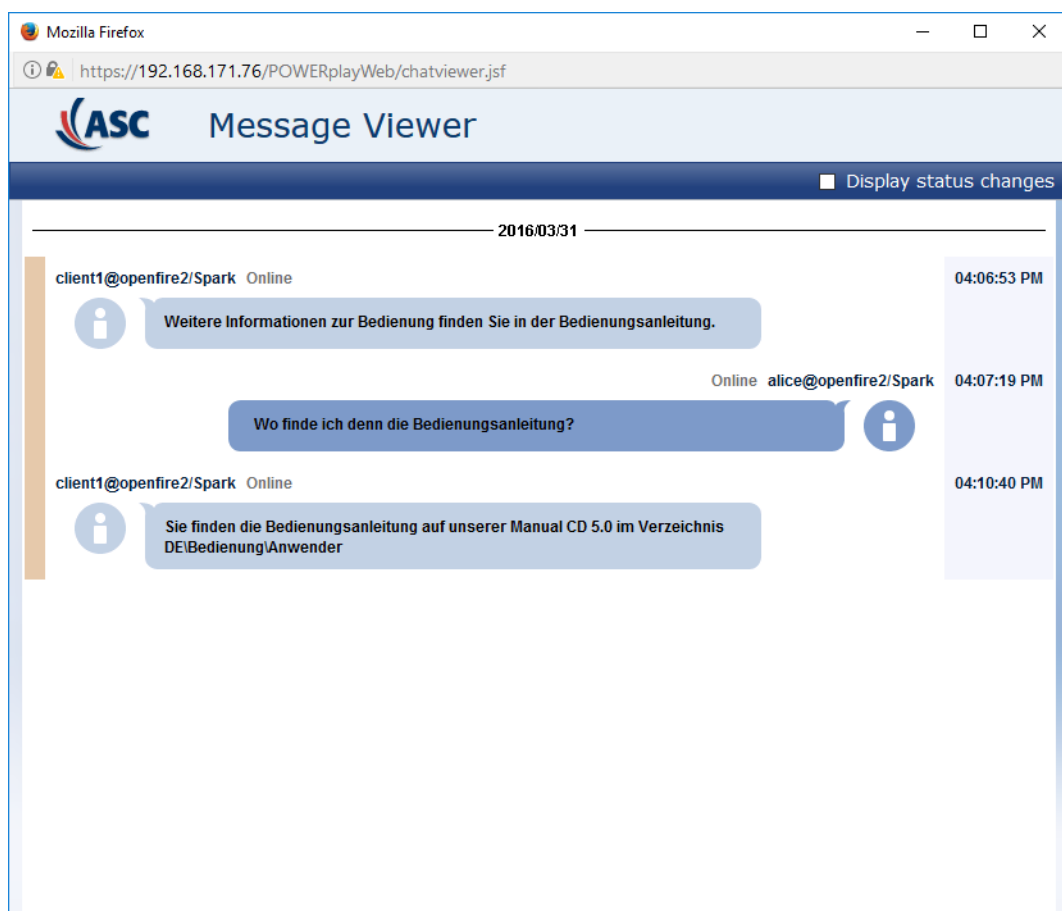


Fig. 61: Message Viewer without the display of the status changes (example)

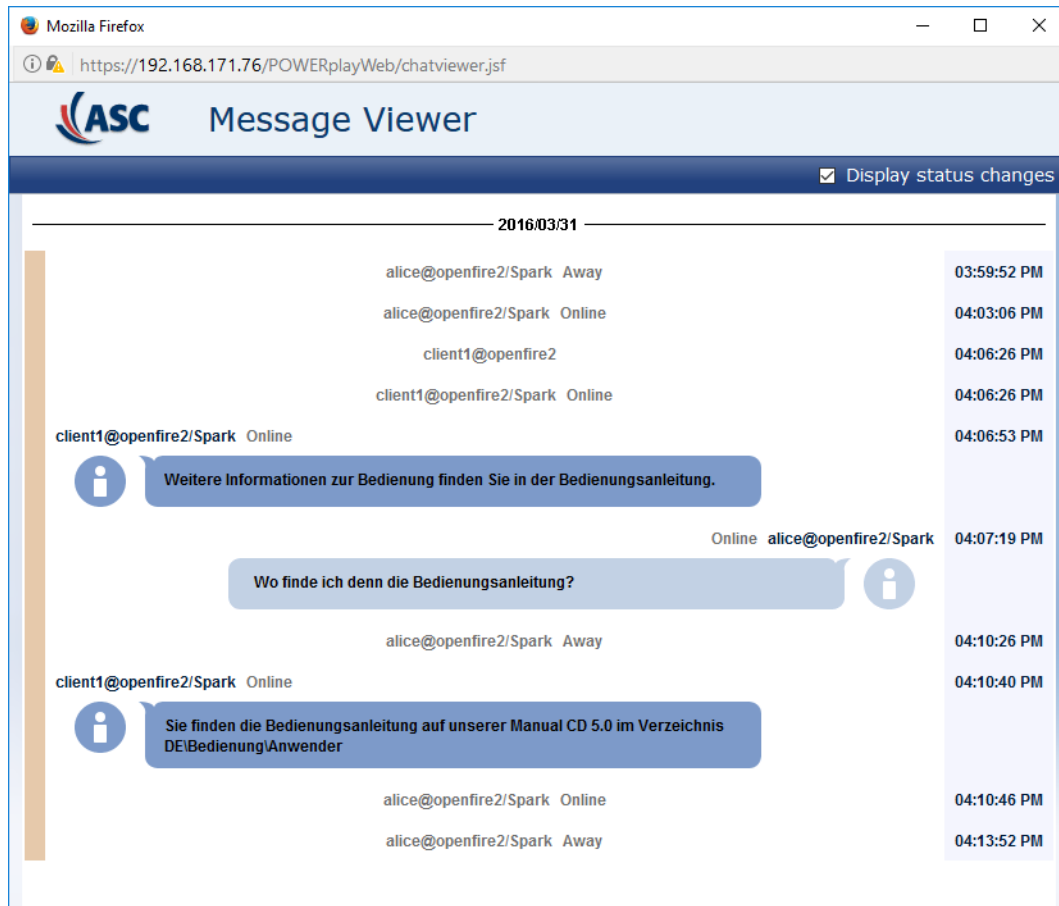



Fig. 62: Message Viewer with the display of the status changes (example)

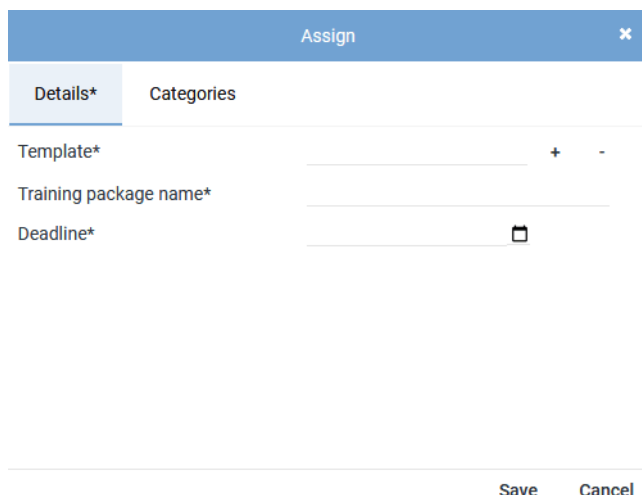
The chat texts or text messages are displayed sorted by date and time. The most recent message is displayed at the bottom.

On the left of the main view, the basic color of the conversation is displayed. If several conversations have been loaded, the basic colors on the left indicate which chat texts or text messages belong together.

6 Assign Training Package

6.1 Assign existing training package

1. Select the tab *Training Packages* (see [chapter "Tab Training Packages", p. 24](#)).
2. To create or assign a new training package, click on the icon  (*Create/Assign*).
3. Select the option *Assign*.



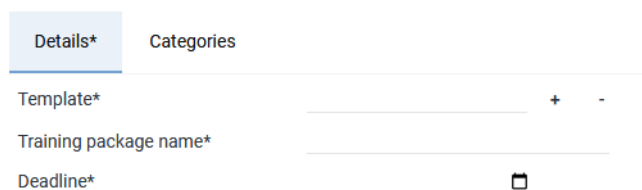
The dialog box titled "Assign" has two tabs: "Details*" and "Categories". The "Details*" tab is active, showing three input fields: "Template*" with a "+" and "-" button, "Training package name*", and "Deadline*" with a calendar icon. At the bottom right are "Save" and "Cancel" buttons.

Fig. 63: Assign/Create training package

The detail view consists of the following tabs:

- Details
Here, you can define the details of a training package, see [chapter "Tab Details", p. 46](#).
 - Categories
Here, you can add categories to the training package, see [chapter "Tab Categories", p. 23](#).
4. To use the entries, click on the button *Save*.
 5. To discard the entries and close the window, click on the button *Cancel*.




6.1.1 Tab Details



The "Tab Details" view shows the same three input fields as the dialog box: "Template*" with "+" and "-" buttons, "Training package name*", and "Deadline*" with a calendar icon.

Fig. 64: Tab Details

Complete the 3 mandatory fields:

Template	To add a training package template to the training package, click on the button  , see chapter "Add training package template", p. 47 . To delete a template from the training package, click on the button  .
Training package name	Enter a name for the training package.
Deadline	To add a deadline for working on a training package, enter the date directly via the keyboard or via the icon  .

6.1.1.1 Add training package template

1. Select the tab *Details* (see [chapter "Tab Details", p. 46](#)).
2. Click on the button **+** (*Add*).

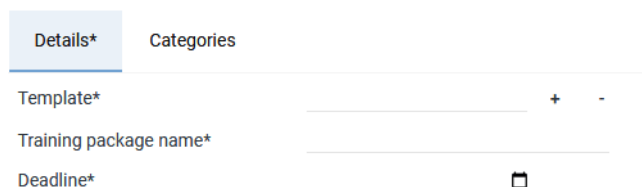


Fig. 65: Tab Details

3. Select a template from the list.

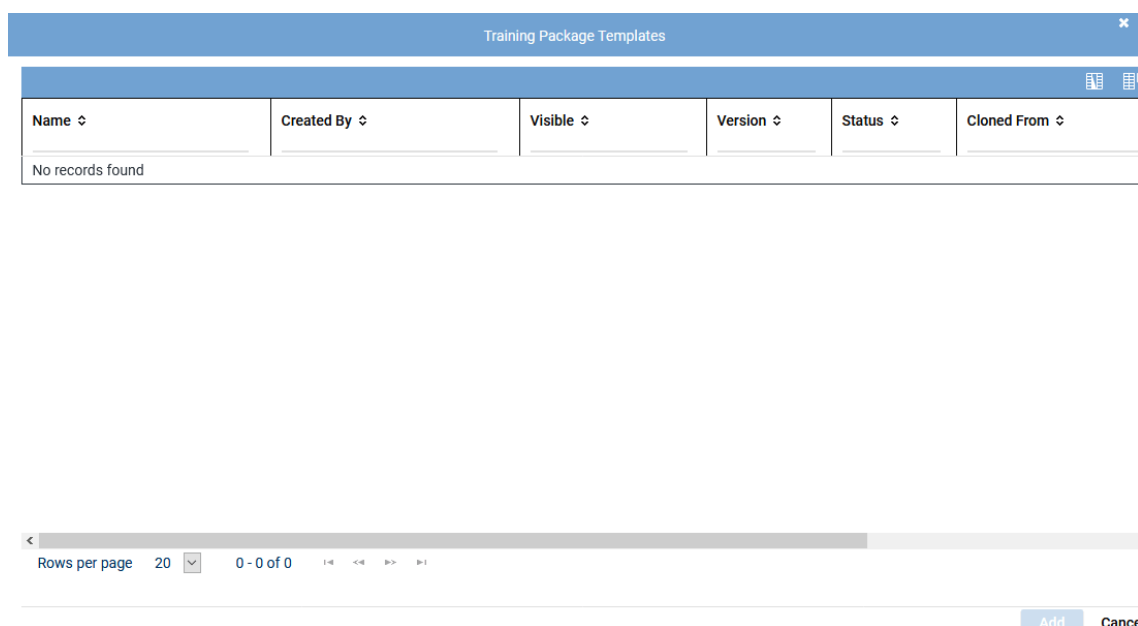


Fig. 66: Add training package template



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

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

6.1.2 Tab Categories

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

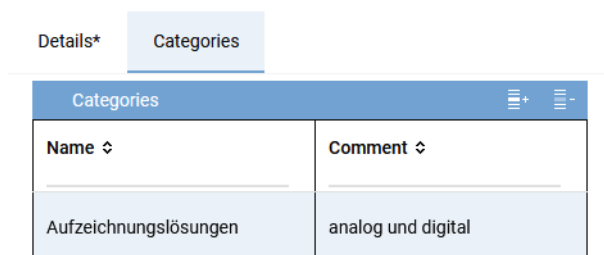




Fig. 67: Tab Categories


	Add	Opens a window in which you can select and add categories (see chapter "Assign existing category", p. 66).
	Remove	Removes the selected category from the list, see chapter "Remove category assignment", p. 23 .



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

6.2

Create and assign training package

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



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

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

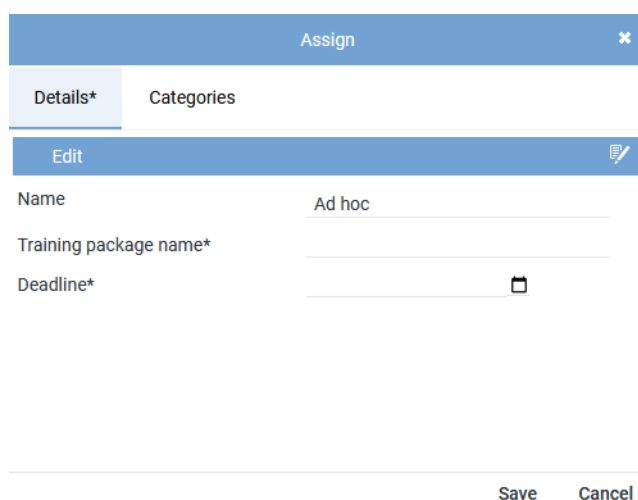


Fig. 68: Create ad hoc training package -detail view

The detail view consists of the following tabs:

- **Details**
Here, you can define the details of a training package. See [chapter "Tab Details", p. 48](#).
 - **Categories**
Here, you can add categories to the training package. See [chapter "Tab Categories", p. 49](#).
6. In the detail view, make all necessary settings within the tabs.
You can change tabs without buffering without risking the loss of your settings.
 7. To assign the training package once you have finished adjusting the entries in the tabs, click on the button *Save*.
To discard the entries and close the window, click on the button *Cancel*.

6.2.1 Tab Details

Here, you can enter details of the training package.

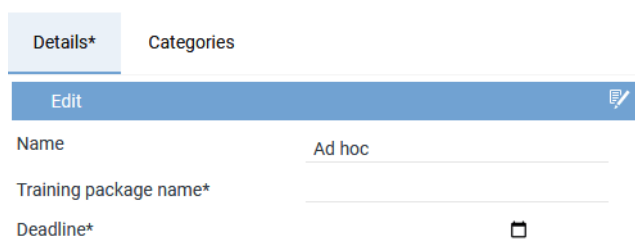



Fig. 69: Tab Details (example)

Complete the 3 mandatory fields:

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

6.2.2 Tab Categories

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

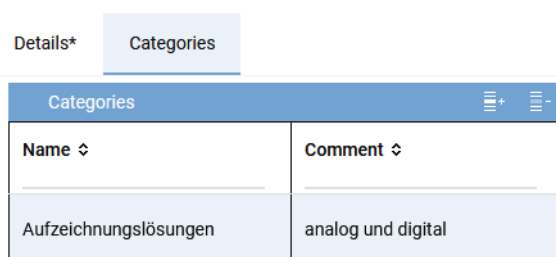




Fig. 70: Tab Categories

	Add	Opens a window in which you can select and add categories (see chapter "Assign existing category", p. 66).
	Remove	Removes the selected category from the list, see chapter "Remove category assignment", p. 23 .



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

6.3 View training package



A training package can only be viewed by the following persons:

- Creator of the training package
- Agents who have been assigned the training package
- Superuser

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

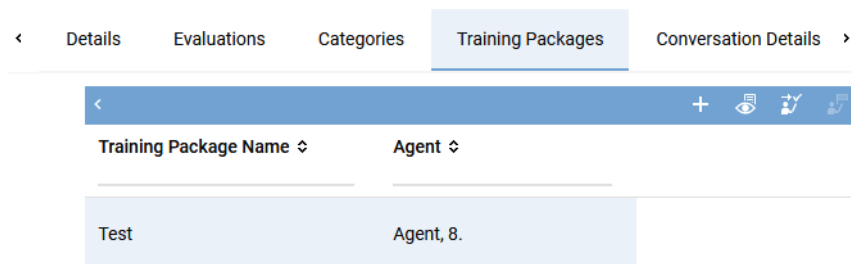


Fig. 71: Select training package (example)

2. Click on the icon  (View).
⇒ The window *Training Package* appears.

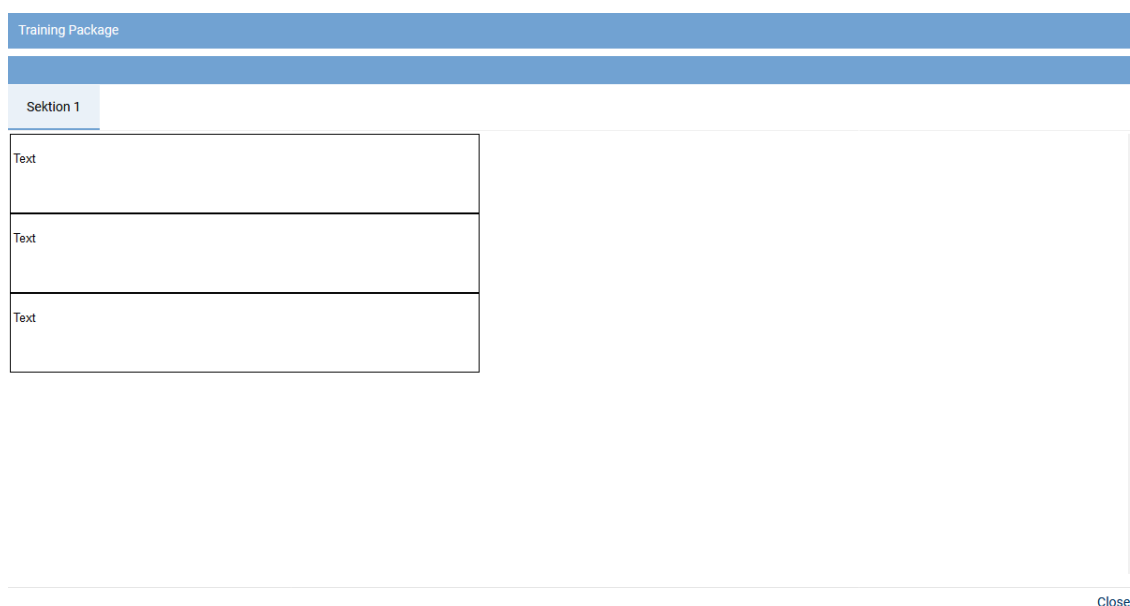



Fig. 72: View training package (example)

3. Here, you can view the training package.
To change the section in the training package window, click on the name of the section above the training package area.
4. To close the on-screen display, click on the button *Close*.
The training package can be viewed regardless of its status.

6.4 Accept training package



A training package can only be started by the user to whom it has been assigned.


1. In the tab *Training Package*, select the training package you would like to accept.
2. Click on the icon  (Accept).
3. The content of the training package is now displayed and can be edited. See [chapter "View training package", p. 49](#).

6.5 Finalize training package



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

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

1. In the tab *Training Package*, select the training package you would like to finalize.
2. Click on the icon  (*Finalize*).

6.6 Define training session

A session can be defined as training session. With this function you can save certain sessions for agent to use them as training sessions.

1. To define a session as training session, click on the menu item *Sessions > Define Training Session* in the toolbar. This session is now available in the Coaching Advisor module.
2. Via the tab *Agents* you can assign the session as training session to an agent. See [chapter "Tab Agents", p. 51](#). The agents are notified if a training session has been assigned to them.
3. You can assign a category to the training session via the tab *Categories*. See [chapter "Tab Categories", p. 53](#)
4. Click on the button *Save* to save the entries. To discard the entries, click on the button *Reset*.

6.6.1 Tab Agents

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



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

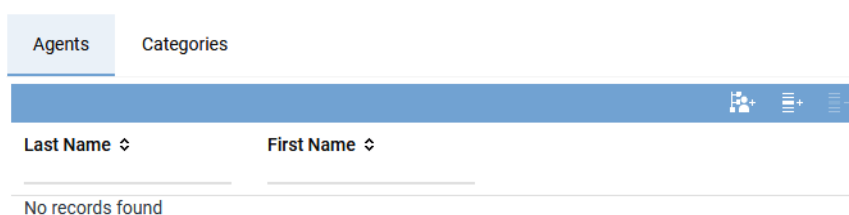





Fig. 73: Tab Agents

	Add from organization structure	Opens a window in which you can select agents from the organization structure. See chapter "Add agents from organization structure", p. 51 .
	Add	Opens a window in which you can select agents who are not necessarily contained in an organization structure. See chapter "Add agents", p. 52 .
	Delete	Deletes the selected agent from the list. See chapter "Delete agent assignment", p. 53 .

6.6.1.1 Add agents from organization structure


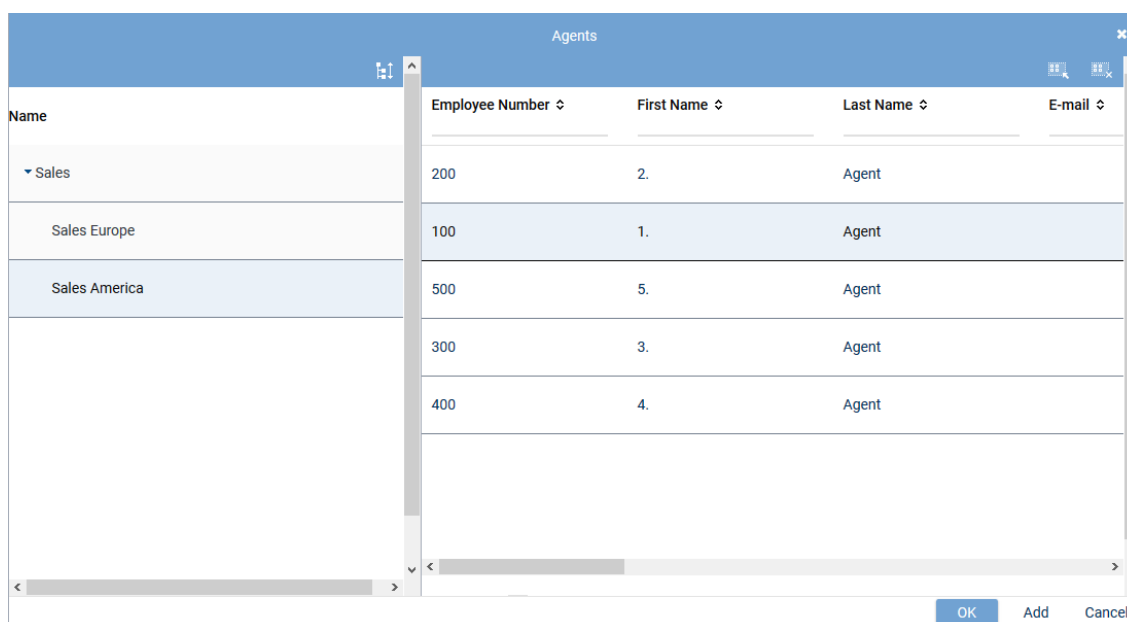
1. Select the tab *Agents* (see [chapter "Tab Agents", p. 51](#)).
2. To assign agents from the organization structure, click on the icon  (*Add from organization structure*).





Fig. 74: Agents

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



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

Fig. 75: Add agents from organization structure


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

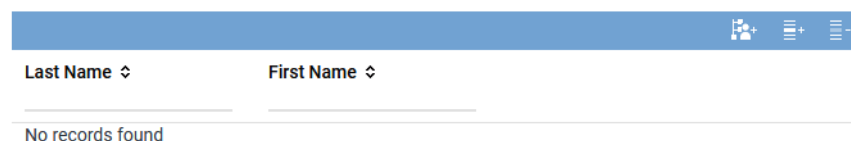
6.6.1.2 Add agents

- Select the tab *Agents* (see [chapter "Tab Agents", p. 51](#)).



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

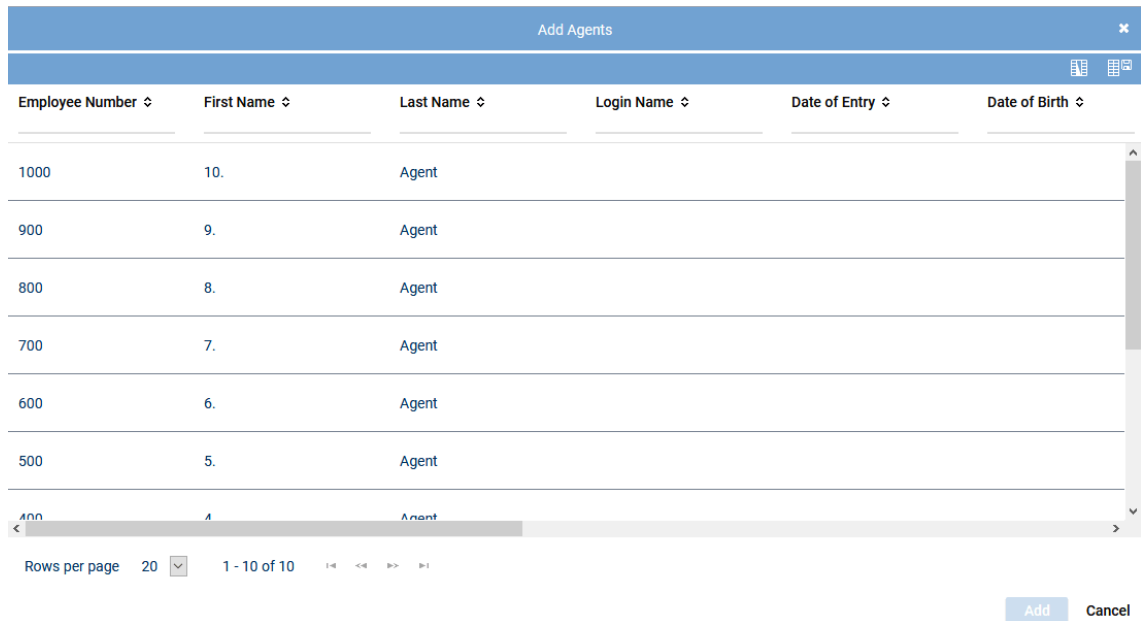
- To assign an agent, click on the icon  (*Add*).



Last Name	First Name
No records found	

Fig. 76: Agents (example)

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




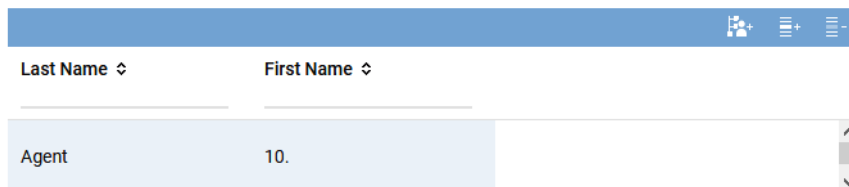
Employee Number	First Name	Last Name	Login Name	Date of Entry	Date of Birth
1000	10.	Agent			
900	9.	Agent			
800	8.	Agent			
700	7.	Agent			
600	6.	Agent			
500	5.	Agent			
400	4.	Agent			

Fig. 77: Add own agents

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

6.6.1.3 Delete agent assignment

- Select the tab *Agents* (see [chapter "Tab Agents", p. 51](#)).
- To remove the assignment of an agent, select the respective agent in the list and click on the icon  (*Remove*).

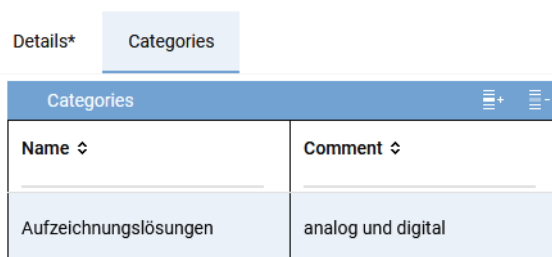


Last Name	First Name
Agent	10.

Fig. 78: Remove agent assignment



6.6.2 Tab Categories

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



Name	Comment
Aufzeichnungslösungen	analog und digital

Fig. 79: Tab Categories

	<i>Add</i>	Opens a window in which you can select and add categories (see chapter "Assign existing category", p. 66).
	<i>Remove</i>	Removes the selected category from the list, see chapter "Remove category assignment", p. 23 .



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




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



If the option *Release sessions* has been activated, the supervisor can only evaluate sessions which have been released by the agent.

(*Employees module -> Settings -> Settings for Session Release*)

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

<i>Evaluate All</i>	<p>This option allows evaluating the complete session.</p> <p>If a screen recording has been saved, then the screen video is displayed in the Video Viewer of the Replay module.</p> <p>If a text message has been saved, then the SMS or SDS recording is displayed in a separate window of the Replay module.</p> <p>If a chat recording has been saved, then the chat text is displayed in the Message Viewer of the Replay module.</p> <p>If a video recording has been saved, then the video call is displayed in the Video Viewer of the Replay module.</p>
<i>Evaluate Audio</i>	<p>This option allows evaluating the audio part of the session. The call is loaded into the Replay module and can be replayed in parallel to the evaluation.</p> <p>The option is only active if a voice recording has been saved for the selected session.</p>
<i>Evaluate Screen</i>	<p>This option allows evaluating the screen content of the session. The screen recording is loaded into the Replay module and can be replayed in parallel to the evaluation.</p> <p>The option is only active if a screen recording has been saved for the selected session.</p>
<i>Evaluate SMS/SDS Text</i>	<p>This option allows evaluating an SMS or SDS. The SMS or SDS recording of the conversation is loaded into a separate window of the Replay module and can be viewed in parallel to the evaluation.</p> <p>The option is only active if a SMS or SDS recording has been saved for the selected session.</p>
<i>Evaluate Chat Text</i>	<p>This option allows evaluating a chat. The chat recording is loaded into the Replay module and can be viewed in Message Viewer parallel to the evaluation.</p> <p>The option is only active if a chat recording has been saved for the selected session.</p>
<i>Evaluate Video</i>	<p>This option allows evaluating the video part of the session. The video recording is displayed in the Video Viewer and can be replayed in parallel with the evaluation.</p>

4. The following window appears:

Evaluation Templates	
Name ↕	Created By ↕
Testbewertung	Admin, 1st-Tenant
Feedback	Admin, 1st-Tenant
Default, Default 80.0 88.33	Admin, 1st-Tenant
Evaluation team AB campaign xy	Admin, 1st-Tenant
Agentenbewertung	Admin, 1st-Tenant
Evaluate Cancel	

Fig. 80: Evaluation templates (example)

5. Select an evaluation template from the list and click on the button *Evaluate*.
⇒ The following window appears:

Evaluations

[100] Sektion 1

100


Ändern Sie den
Fragetext in den
Elementeigenschaften.

☐ Sehr gut
 ☐ Gut
 ☐ Durchschnittlich
 ☐ Ausreichend
 ☐ Schlecht
 ☒ N/A

Apply Cancel

Fig. 81: Evaluations (example)

6. Complete the evaluation template accordingly.
7. To change the section in the evaluation template, click on the name of the section above the evaluation area.
8. During the evaluation you can replay the conversation in the Replay module.
For information about the functions of the Replay module see [chapter "Replay module", p. 27](#).
9. To apply the evaluation, click on the button *Apply*.
10. To save the evaluation and release it directly, click on the button *Yes*. In this case, the evaluation cannot be edited anymore.
To save the evaluation without releasing it right away, click on the button *No*. In this case, the evaluation can still be edited at a later moment in the Evaluations module, see user manual *INSPIRATIONneo - Usage Quality Management module*.



Do you want to release the evaluation?

Yes No

Fig. 82: Release evaluation

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



Evaluations	
[100] Sektion 1	
100	Ändern Sie den Fragetext in den Elementeigenschaften. <input type="radio"/> Sehr gut <input type="radio"/> Gut <input type="radio"/> Durchschnittlich <input type="radio"/> Ausreichend <input type="radio"/> Schlecht <input checked="" type="radio"/> N/A

Close

Fig. 83: Close evaluation (example)

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

8

Release session for regular deletion

Here, you can release the session for the regular deletion. The function is only active if the session has been saved with the function *Keep session* before.

1. To release a session for regular deletion, click on the menu item *Sessions > Release for Regular Deletion* in the toolbar. The period of validity is set back to the original value and the session can be deleted from the main view with the function *Delete session*.

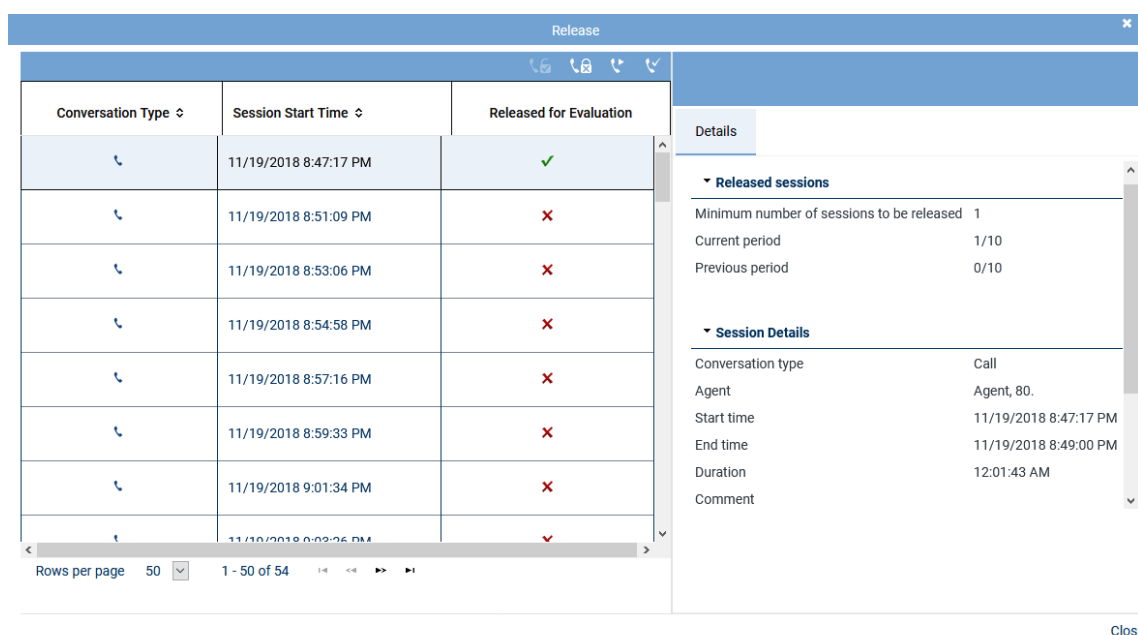
9 Release session for evaluation



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

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

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



The screenshot shows the 'Release' window with a table of sessions and a details panel on the right.

Conversation Type	Session Start Time	Released for Evaluation
Call	11/19/2018 8:47:17 PM	✓
Call	11/19/2018 8:51:09 PM	✗
Call	11/19/2018 8:53:06 PM	✗
Call	11/19/2018 8:54:58 PM	✗
Call	11/19/2018 8:57:16 PM	✗
Call	11/19/2018 8:59:33 PM	✗
Call	11/19/2018 9:01:34 PM	✗
Call	11/19/2018 9:03:26 PM	✗

Details panel:

- Released sessions**
 - Minimum number of sessions to be released: 1
 - Current period: 1/10
 - Previous period: 0/10
- Session Details**
 - Conversation type: Call
 - Agent: Agent, 80.
 - Start time: 11/19/2018 8:47:17 PM
 - End time: 11/19/2018 8:49:00 PM
 - Duration: 12:01:43 AM
 - Comment:

Rows per page: 50 | 1 - 50 of 54

Fig. 84: Release sessions (as agent)

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

The following information about the session is displayed:

Conversation Type	Displays the type of the conversation. Call = call/video call Work item = work item (screen) Call and screen recording = call and screen Text = SMS/SDS Chat = chat
Session Start Time	Shows the start time of the session.
Released for Evaluation	Shows whether the session has been released for evaluation: ✓ = released ✗ = not released

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





Group field Released Sessions

Minimum number of sessions to be released	The number show how many session have to be released at least during the defined period of time.
-------------------------------------------	--------------------------------------------------------------------------------------------------

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

Group field Session Details

Shows information about the selected session. A description of the displayed information can be found in [chapter "Main view", p. 10](#).

1. Select a session in the main view.
2. To replay a session, click on the icon  (*Load*), see [chapter "Load session", p. 72](#).
3. To release a session, click on the icon  (*Release session*), see [chapter "Release session", p. 60](#).
 - ⇒ The released session is displayed in the table of the main view of the Sessions module, in the column *Released for Evaluation* with the status *Evaluated*.
4. To remove a session from the evaluation process which has originally been released for evaluation, click on the icon  (*Lock session*), see [chapter "Lock session", p. 60](#).
 - ⇒ The locked session is displayed in the table of the main view of the Sessions module, in the column *Released for Evaluation* with the status *Not evaluated*.
5. To evaluate a session, click on the icon  (*Evaluate*), see [chapter "Evaluate session", p. 55](#).
6. To close the window *Release*, click on the button *Close*.


9.1

Release session



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

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

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



All agents have the right to lock their sessions as long as they have not yet been evaluated, see [chapter "Lock session", p. 60](#).


9.2

Lock session



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

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

1. In the main view, select the session you would like to lock.
 2. Click on the icon  (*Lock session*) in the toolbar.
- ⇒ The session cannot be evaluated by the supervisor (superior) anymore.



All agents have the right to release their sessions one again, see [chapter "Release session", p. 60](#).

10

Evaluate released session

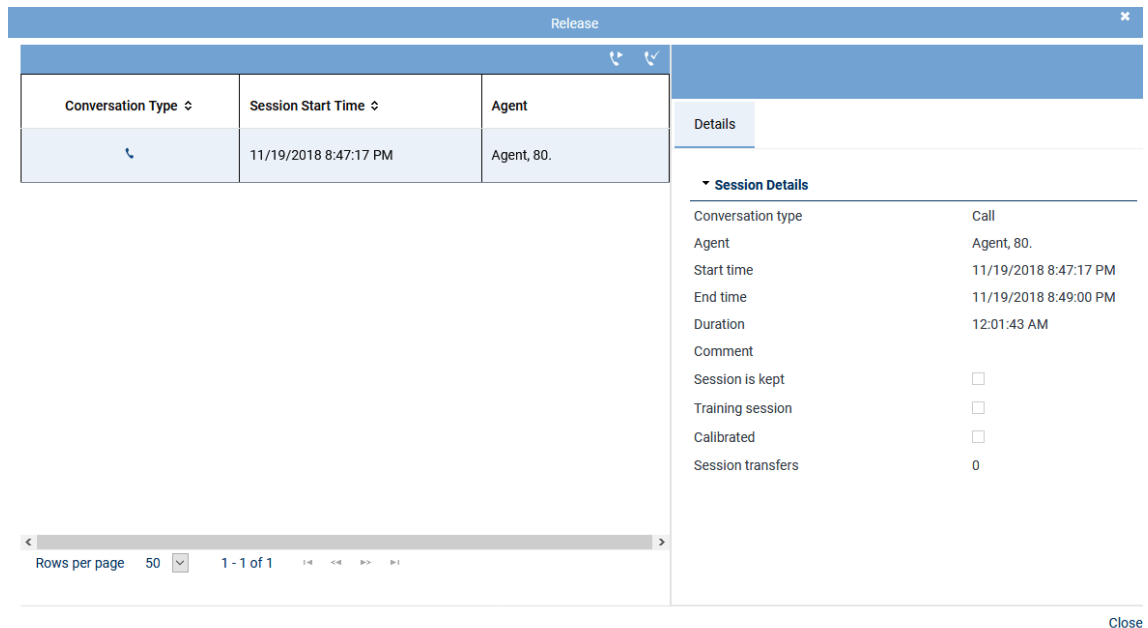


This function is only available for supervisors.


The supervisor must have been created as the superior of a team in the organization structure.

As a supervisor use this function to listen to and evaluate the sessions that the agents have released for evaluation.

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



The screenshot shows the 'Release' window with a table of released sessions and a details panel on the right.

Conversation Type	Session Start Time	Agent
	11/19/2018 8:47:17 PM	Agent, 80.

Details panel:

- Session Details**
 - Conversation type: Call
 - Agent: Agent, 80.
 - Start time: 11/19/2018 8:47:17 PM
 - End time: 11/19/2018 8:49:00 PM
 - Duration: 12:01:43 AM
 - Comment:
 - Session is kept: ☐
 - Training session: ☐
 - Calibrated: ☐
 - Session transfers: 0

Footer: Rows per page 50 1 - 1 of 1

Fig. 85: Release sessions (as supervisor)

In the main view, all sessions which have been released for evaluation are displayed.

The following information about the session is displayed:

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


Session Start Time Shows the start time of the session.


Agent Name of the agent who is the subject of the session. If several agents participate in a call, a session is created for each agent.

The detail view consists of the following group field:

Session details

Shows information about the selected session. A description of the displayed information can be found in [chapter "Main view", p. 10](#).

- Select a session in the main view.
- To replay a session, click on the icon  (Load), see [chapter "Load session", p. 72](#).

3. To evaluate a session, click on the icon  (*Evaluate*), see [chapter "Evaluate session", p. 55](#).
 - ⇒ The evaluated session is displayed in the table of the main view of the Sessions module, in the column *Evaluated Session* with the status *Evaluated*.
4. To close the window *Release*, click on the button *Close*.

11

Administrate categories

Here, you can display already existing categories of the sessions, create new categories, and select or delete existing categories. Additionally, you can view the assigned conversations of a category, define a new deletion time, and add keywords. Furthermore, you see how many conversations of the selected category have already been assigned.

1. Click on the menu item *Sessions > Administrate Categories* in the toolbar.

⇒ The window *Administrate Categories* appears.

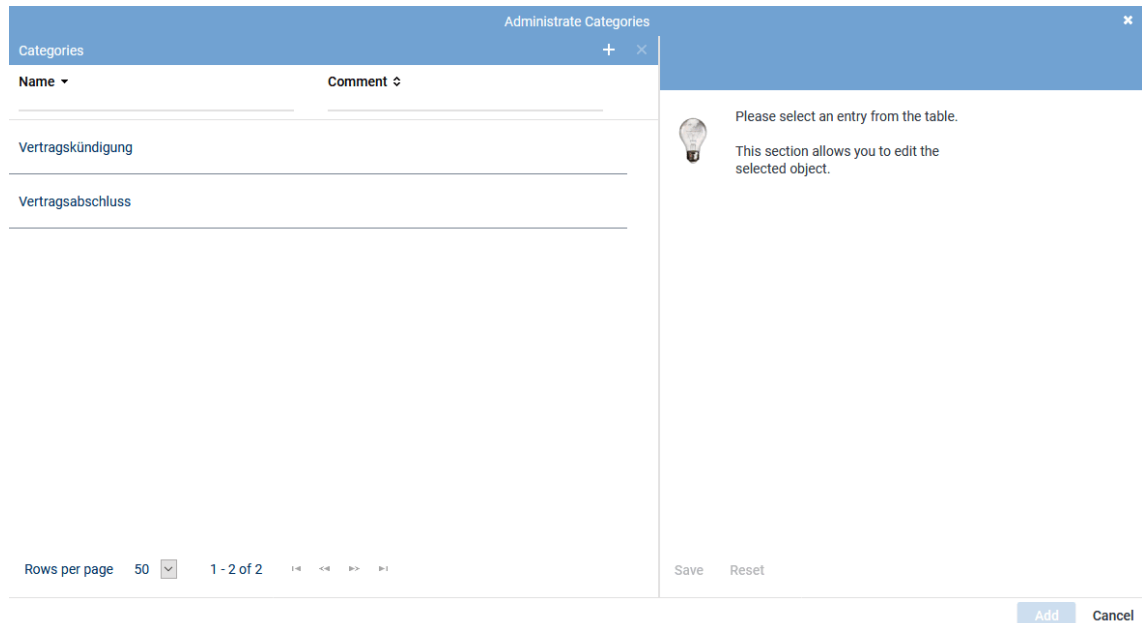



Fig. 86: Administrate categories

The following functions are available:

- [chapter "Create and add new category", p. 63](#)
- [chapter "Assign existing category", p. 66](#)
- [chapter "Rename existing category", p. 66](#)
- [chapter "View and filter assigned conversations", p. 67](#)
- [chapter "Add and edit keywords", p. 69](#)
- [chapter "Delete category", p. 71](#)

11.1

Create and add new category

1. In the menu *Sessions* in the toolbar, click on the menu item *Administrate categories* or alternatively select the tab *Categories* (see [chapter "Tab Categories", p. 23](#)) in the detail view of a selected session and click on the icon  (*Administrate categories*).

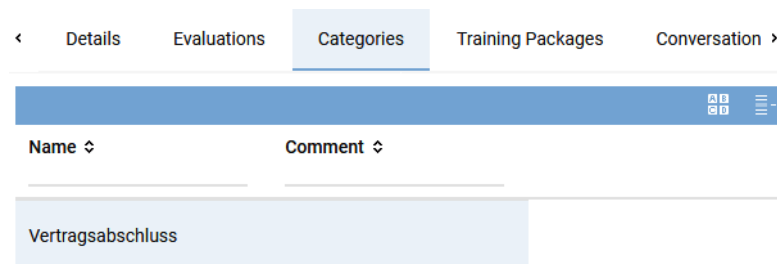


Fig. 87: Tab Categories in the detail view

⇒ The window *Administrate Categories* appears.

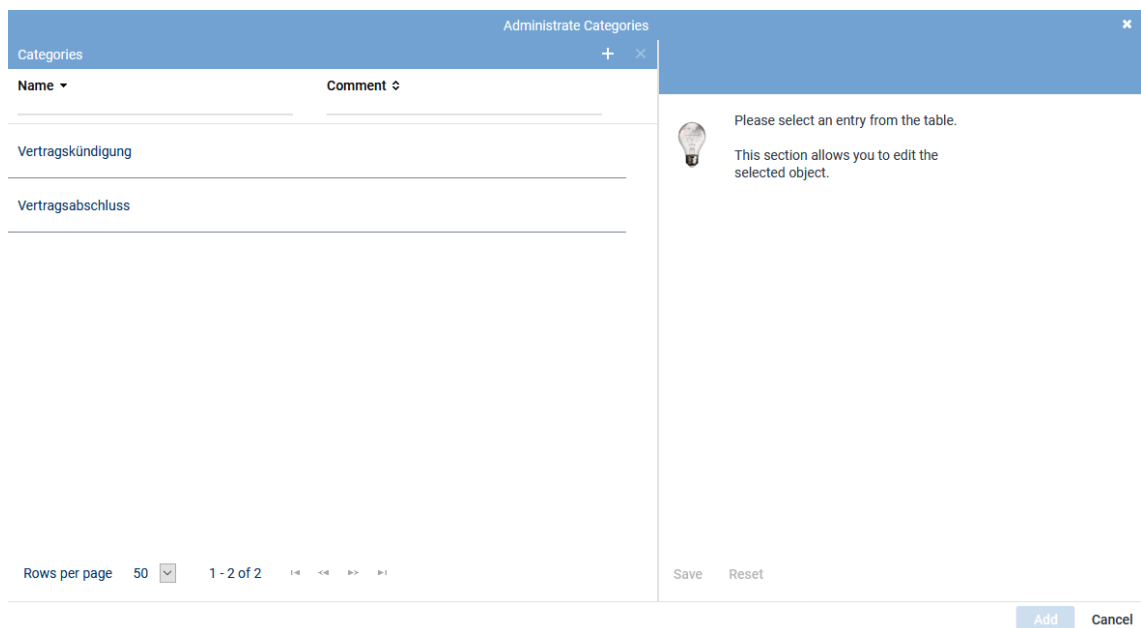



Fig. 88: Create new category

2. Click on the icon  (*Create*) in the main view.
3. Click on the tab *Details* in the detail view.
4. Enter a name for the category in the entry field *Name*.
5. If required, enter a comment for the category in the entry field *Comment*.

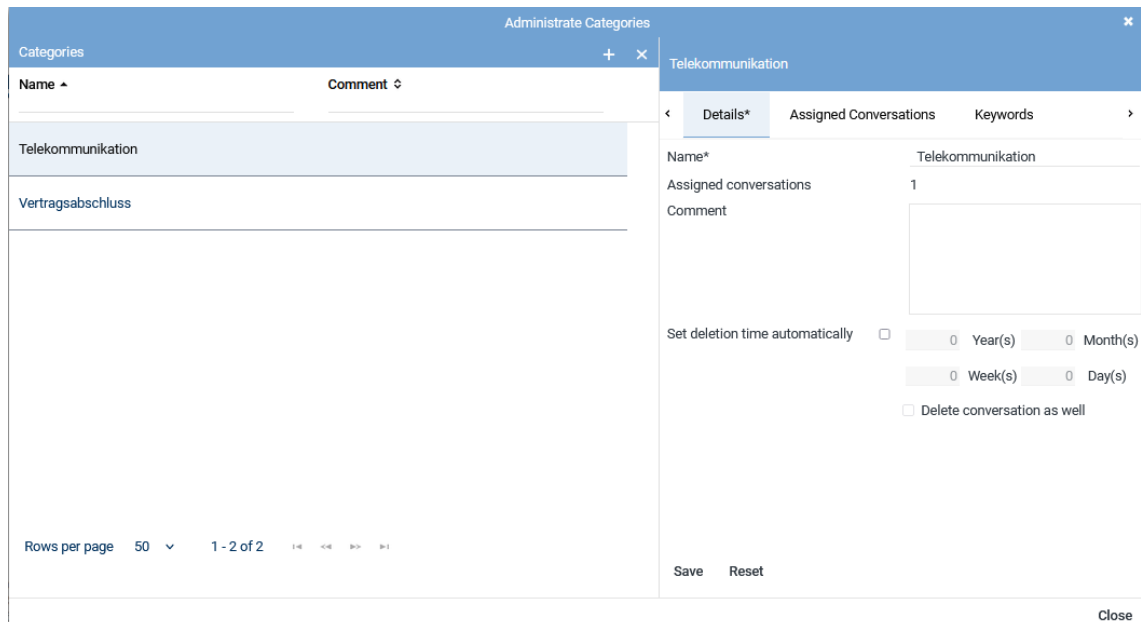


Fig. 89: Create new category

6. To save the category, click on the button *Save*.
To discard the unsaved settings, click on the button *Reset*.
7. To assign the category of a session, click on the button *Add*.
To close the window without adding the category, click on the button *Cancel*.

11.2 Set delete time automatically

This function allows you to define an individual retention period (TTL) for the categories. The retention period is calculated upon assigning the category.

ATTENTION!


Existing settings of retention periods in the recording plan of the Recording Planner module are overwritten.

Additionally, you can define whether the corresponding conversation is supposed to be deleted as well. Regardless of whether the option *Delete conversation as well* has been activated, the corresponding conversation will be deleted together with the session if the retention period of the session has been set to a later time than the retention period of the corresponding conversation in the Recording Planner module.

If the session belongs to several categories with different times of deletion, then the session is not deleted before the latest time of deletion will have been reached.



The user must have the respective access right and license to access a module or use a function.

1. In the menu Sessions in the toolbar, click on the menu item *Administrate categories* or alternatively select the tab *Categories* (see [chapter "Tab Categories", p. 23](#)) in the detail view of a selected session and click on the icon  (*Administrate categories*).

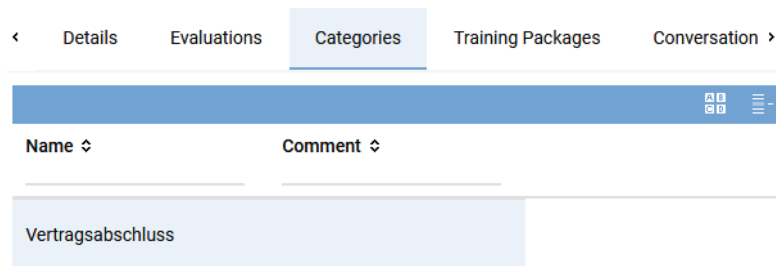


Fig. 90: Tab Categories in the detail view

⇒ The window *Administrate Categories* appears.

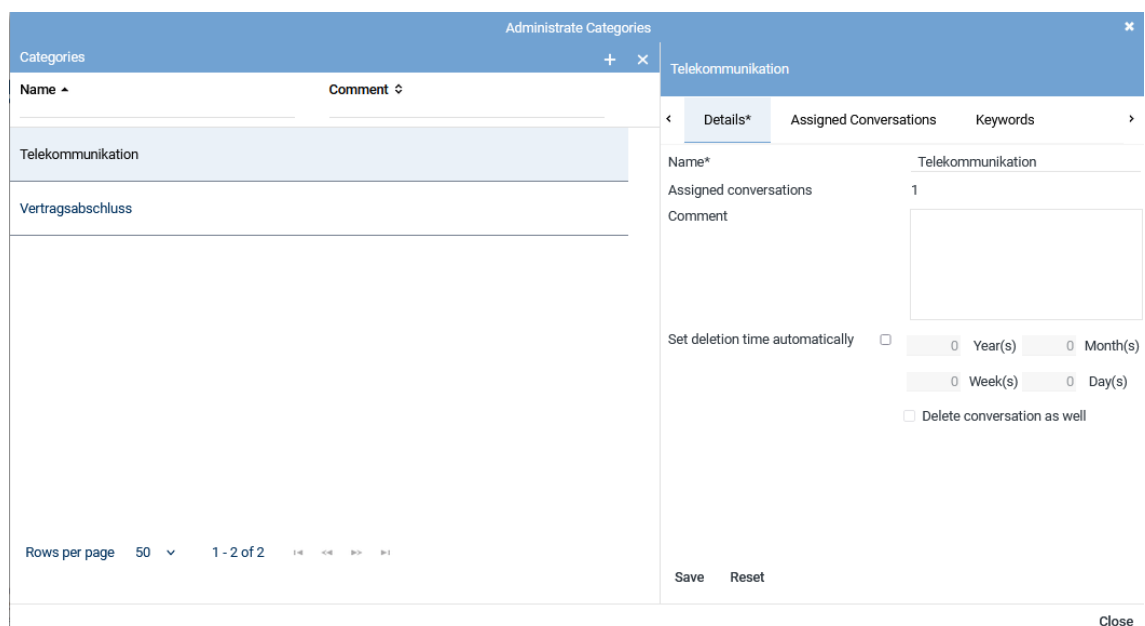



Fig. 91: Set delete time automatically

2. Activate the check box *Set delete time automatically*.
3. Enter the new retention period in years, months, weeks, and days.
4. Activate the check box *Delete conversation as well* if the corresponding conversation is supposed to be deleted together with the session.
5. To add the entries to the category, click on the button *Save*.
To discard the unsaved settings, click on the button *Reset*.

11.3 Assign existing category

1. In the menu Sessions in the toolbar, click on the menu item *Administrate categories* or alternatively select the tab *Categories* (see [chapter "Tab Categories", p. 23](#)) in the detail view of a selected session and click on the icon  (*Administrate categories*).

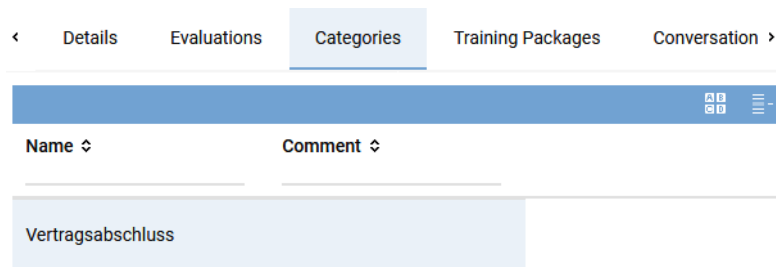


Fig. 92: Tab Categories in the detail view

⇒ The window *Administrate Categories* appears.

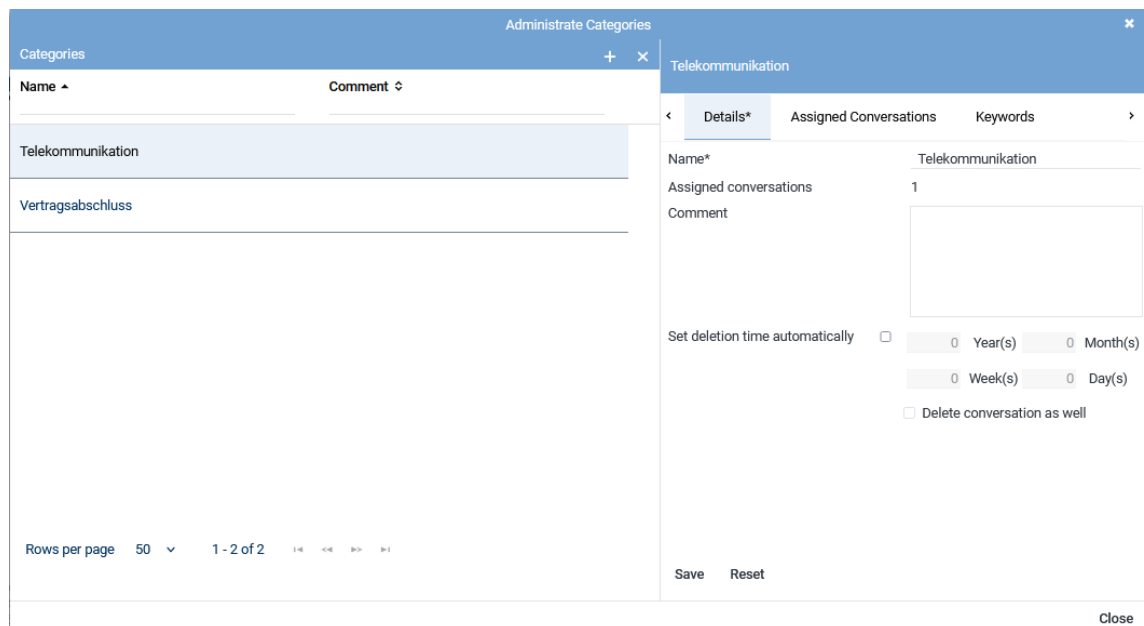



Fig. 93: Administrate categories

2. Select a category from the list in the main view.
3. To assign the category of a session, click on the button *Add*.
To close the window without adding the category, click on the button *Cancel*.

11.4 Rename existing category

1. In the menu Sessions in the toolbar, click on the menu item *Administrate categories* or alternatively select the tab *Categories* (see [chapter "Tab Categories", p. 23](#)) in the detail view of a selected session and click on the icon  (*Administrate categories*).

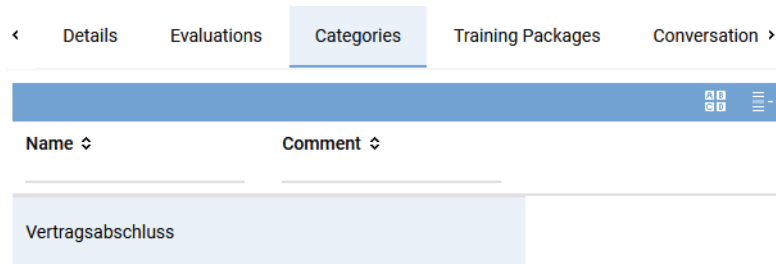


Fig. 94: Tab Categories in the detail view

⇒ The window *Administrate Categories* appears.

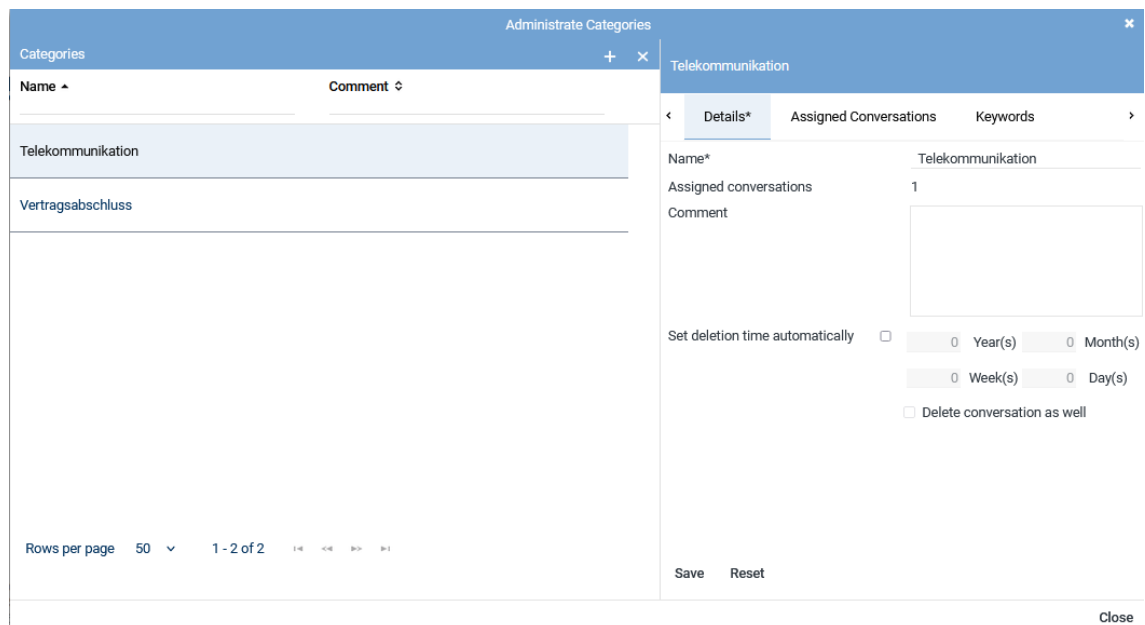



Fig. 95: Add category

2. Select a category from the list in the main view.
3. To change the name, click on the tab *Details* and change the name in the field *Name*.
To apply the changes, click on the button *Save*.
To close the window without applying the changes, click on the button *Cancel*.

11.5 View and filter assigned conversations

Here, you can view all assigned conversations of a category and retrieve information about the conversation. In addition, you can filter all assigned conversations based on the agent name.

1. In the menu Sessions in the toolbar, click on the menu item *Administrate categories* or alternatively select the tab *Categories* (see [chapter "Tab Categories", p. 23](#)) in the detail view of a selected session and click on the icon  (*Administrate categories*).

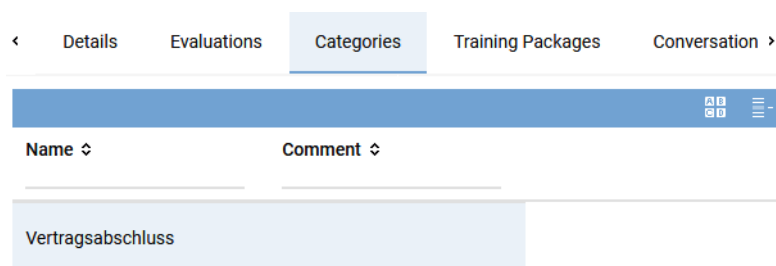


Fig. 96: Tab Categories in the detail view

- ⇒ The window *Administrate Categories* appears.
2. Select a category.
 3. Click on the tab *Assigned Conversations* in the detail view.
 4. In order to filter assigned conversations based on the agent name, enter the name in the field *Agent*.

Kind oder Mann		
< Details*	Assigned Conversations	Keywords >
Session Start Time ↕	Agent ↕	Info
01/09/2019 3:56:45 PM	Mustermann, Max	(i)
01/09/2019 3:53:22 PM	Mustermann, Maxi	(i)
01/09/2019 3:50:35 PM	Mustermann, Max	(i)
01/09/2019 3:54:38 PM	Mustermann, Max	(i)
01/09/2019 3:54:13 PM	Mustermann, Max	(i)
01/09/2019 3:56:45 PM	Mustermann, Maxi	(i)
<div> <div><</div> <div></div> <div>></div> </div>		
Save Reset		

Fig. 97: View assigned conversations

5. To save the filter view, click on the button *Save*.

To discard the unsaved settings, click on the button *Reset*.

6. To view additional information about the conversation, click on the button *Info*.

Info		✕
Details		
Agent	Mustermann, Max	
Duration	12:00:22 AM	
Start time	01/09/2019 3:56:45 PM	
End time	01/09/2019 3:57:08 PM	
Close		

Fig. 98: View information

7. To close the information window, click on the button *Close*.

11.6 Add and edit keywords




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




Keywords must be created in the Audio Analysis module previously and processed by means of an audio analysis job. To be able to use the function *Automatic categorization*, this option must have been activated in the Audio Analysis module.



For basic information about creating and administrating keywords and audio analysis jobs refer to the user manual *INSPIRATIONneo - Usage Audio Analysis module*.

Add keywords to a category and define how often the keyword must be found in a session. If the minimum amount of keywords is found in a session, the category is automatically added to the session. The function *Search* () allows searching systematically for conversations which have been sorted into a category.

1. In the menu Sessions in the toolbar, click on the menu item *Administrate categories* or alternatively select the tab *Categories* (see [chapter "Tab Categories", p. 23](#)) in the detail view of a selected session and click on the icon  (*Administrate categories*).

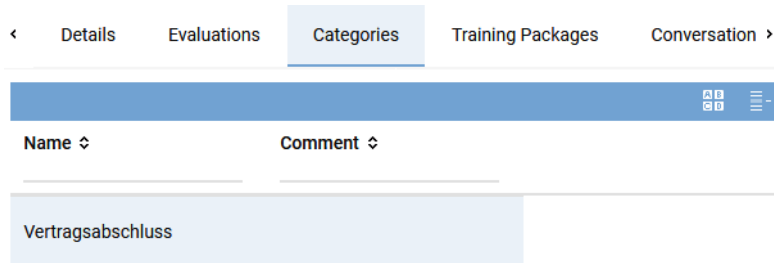

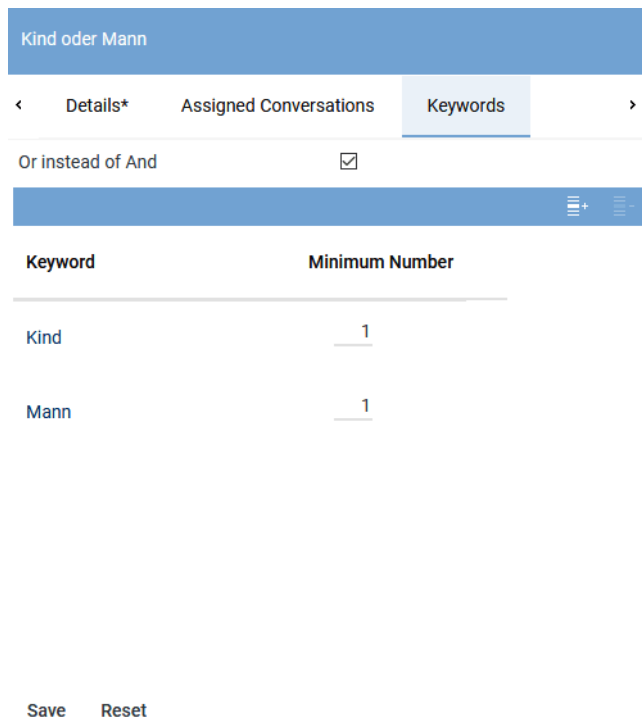


Fig. 99: Tab Categories in the detail view

- ⇒ The window *Administrate Categories* appears.
2. Select a category.
 3. Click on the tab *Keywords* in the detail view.
 4. If at least one of the keywords is supposed to be found in the sessions, activate the check box *Or instead of And*.
 5. To add keywords to a category, click on the icon  (*Add*).



Kind oder Mann

< Details* Assigned Conversations **Keywords** >

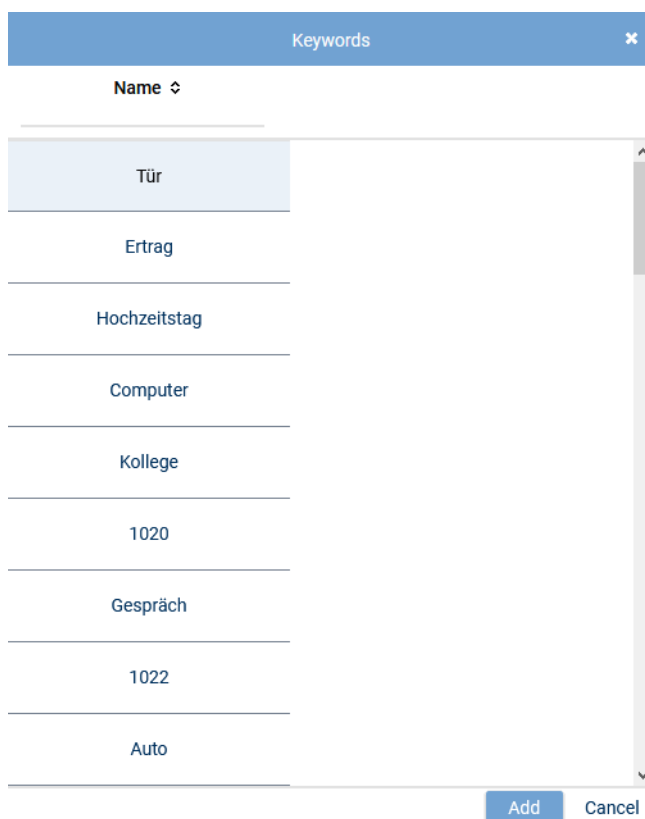
Or instead of And ☒

Keyword	Minimum Number
Kind	1
Mann	1

Save Reset

Fig. 100: Tab Keywords

6. Select 1 or several keywords in the window *Keywords*.
7. In order to filter keywords based on the name, enter the name in the field *Name*.
8. Click on the button *Add*.
 - ⇒ The keywords are displayed in the tab *Keywords*. Upon saving, the keywords have been sorted into the selected category.




Keywords

Name ↕


Tür
Ertrag
Hochzeitstag
Computer
Kollege
1020
Gespräch
1022
Auto

Add Cancel

Fig. 101: Add keywords

9. To delete keywords, select one or several keywords and click on the icon  (*Remove*).
10. To adjust the minimum number of a keyword, click on the entry field of the column *Minimum Number*.
11. Enter the value directly into the entry field via the keyboard. The minimum number of the keyword is 1.
 - ⇒ The selected category is assigned to a session automatically if the minimum number of keywords of this category is found in a session.
12. To add the keywords to the category, click on the button *Save*.
To discard the unsaved settings, click on the button *Reset*.

11.7 Delete category

1. In the menu Sessions in the toolbar, click on the menu item *Administrate categories* or alternatively select the tab *Categories* (see [chapter "Tab Categories", p. 23](#)) in the detail view of a selected session and click on the icon  (*Administrate categories*).

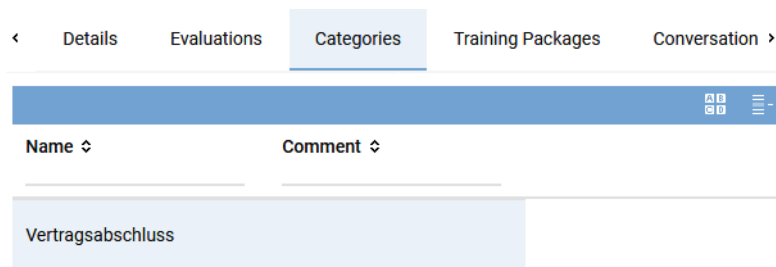


Fig. 102: Tab Categories in the detail view

- ⇒ The window *Administrate Categories* appears.

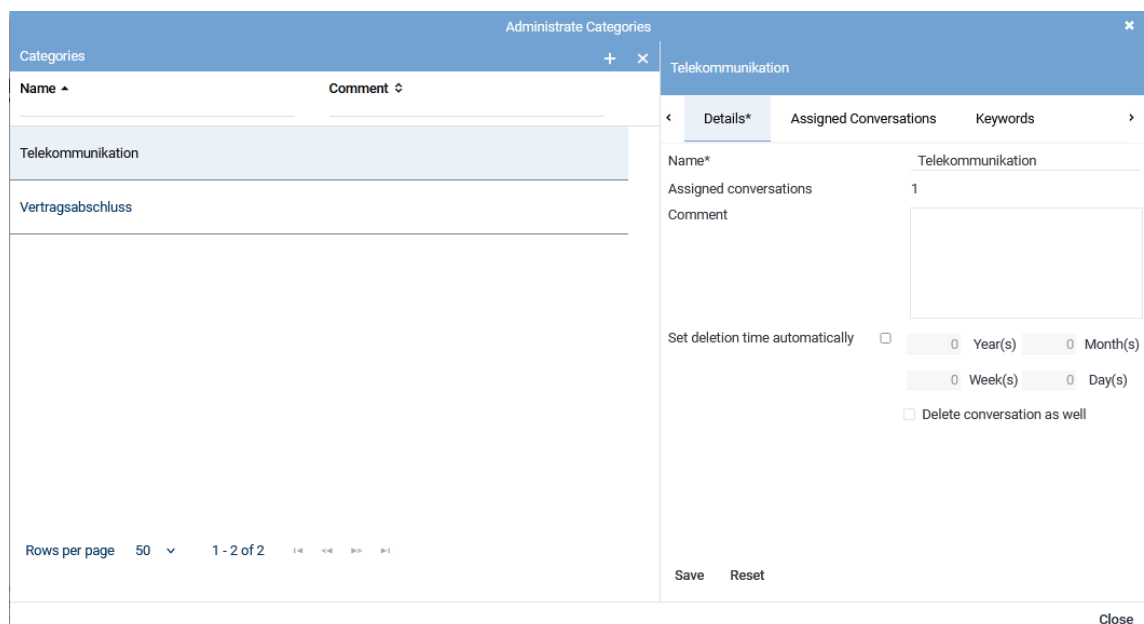




Fig. 103: Delete category

2. From the list in the main view, select the category that you would like to delete.
3. To delete the category, click on the icon  (*Delete*).




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

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

12 Load session

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

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

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

4. The session is loaded into the Replay module and can be replayed there.
For information about the functions of the Replay module see [chapter "Replay module"](#), p. 27.



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

13

Export session

- Click on the menu item *Sessions > Export* in the toolbar of the main view.
⇒ The following window appears:

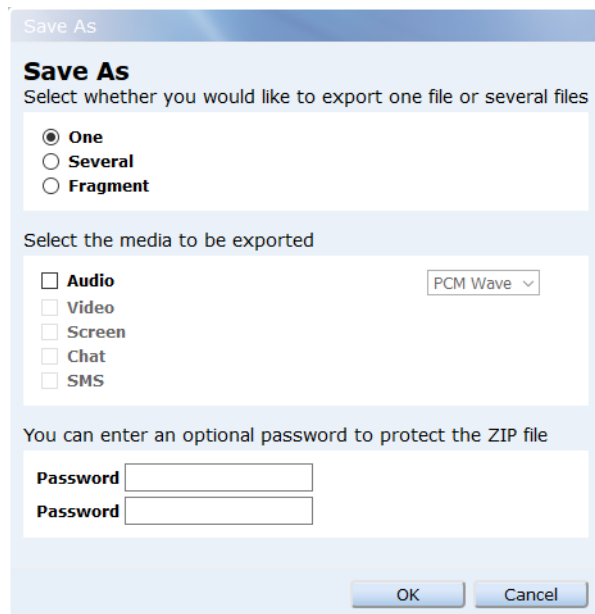


Fig. 104: Save as

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

<i>Single</i>	<p>Mixes all recordings of one or several conversations in one file.</p> <p>NOTICE! If you select several conversations, the gap between them is filled with silence. Selecting conversations with a large gap between them results in very large WAVE files. Therefore, make sure to only select conversations which are not separated by a large gap.</p>
<i>Several</i>	Creates its own file for each recording to be saved.
<i>Fragment</i>	Only data contained in the set loop are saved. All other data is discarded.
<i>Audio</i>	<p>Saves the audio data.</p> <p>Select the audio format from the drop-down list:</p> <ul style="list-style-type: none"> <i>PCM Wave</i> <p>With PCM, the output file is not compressed and can be replayed by almost any player. This method requires a lot of storage capacity.</p> <i>MP3</i> <p>With MP3, the output file is compressed and can be replayed by almost any player. When using MP3, less storage space is required for high-quality recordings than when exporting conversations in WAVE format.</p>
<i>Video</i>	<p>Saves the video data.</p> <p>Video is exported in MP4 format with video codec H.264. If the conversation contains more than one stream, only the first stream is exported.</p>
<i>Screen</i>	Saves the screen recordings.
<i>Chat</i>	Saves the chat text.
<i>SMS</i>	Saves the SMS data.
<i>Password</i>	Protects the ZIP file with a password.

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

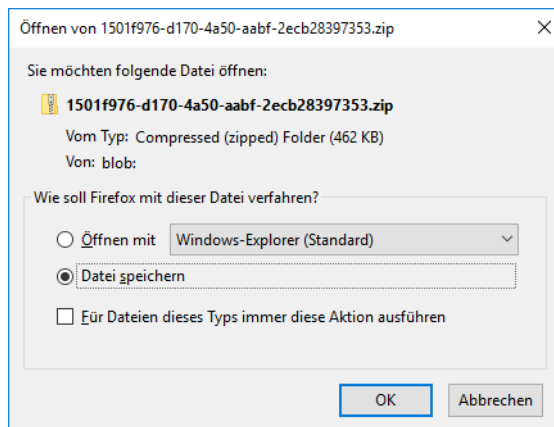


Fig. 105: Save conversations

4. Select the option *Save File*.
5. Click on the button *OK*.
⇒ The elements are exported to the local download directory in a ZIP file.
The ZIP file contains the following files:
The audio data is saved as **WAVE** or **MP3** file(s).
Audio data and screen recordings are saved as MP4 file(s).
Video data is saved as MP4 file(s).
Screen data is saved as MP4 file(s).
The corresponding meta data is saved in the same directory as CSV file(s) under the same file name.
Chat texts are saved as **XML** file(s).
SMS data is saved as **XML** file(s).

14 Create calibration

If the results of the evaluations differ significantly, you can calibrate the session.

1. Select the respective evaluation in the main view.
2. Click on the menu item *Sessions > Calibrate* in the toolbar.
⇒ The window *Create calibration* appears.
3. Adjust all necessary settings within the 3 tabs.
You can change tabs without buffering without risking the loss of your settings.
 - *Details*, see [chapter "Tab Details"](#), p. 75
 - *Evaluations*, see [chapter "Tab Evaluations"](#), p. 76
 - *Supervisors*, see [chapter "Tab Supervisors"](#), p. 77.
4. To save the settings, click on the button *Save*.
To discard the changes, click on the button *Cancel*.

14.1 Tab Details

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

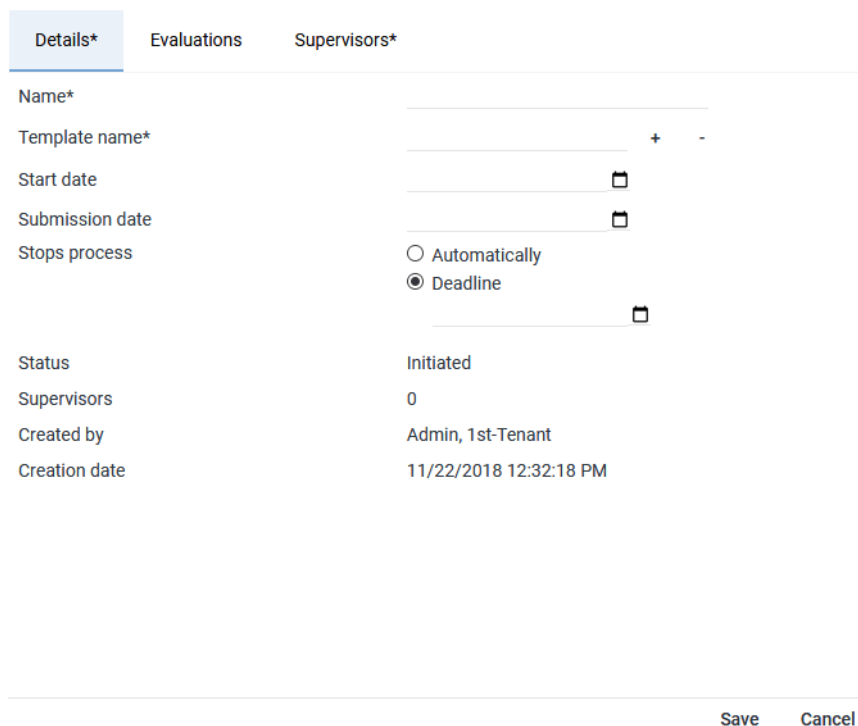


Fig. 106: Calibration - detail view (example)

In general, the following information is available:

<i>Name</i>	Name of the calibration. Enter the name of the calibration.
<i>Template name</i>	Name of the template. The button + allows adding a template to the calibration.
<i>Start date</i>	Start date of the calibration. Select the date.
<i>Submission date</i>	Delivery date of the calibration evaluations. Select the date.
<i>Stops process</i>	Shows the stop mode. <ul style="list-style-type: none"> • Automatically The calibration ends automatically when all calibration evaluations have been submitted.

	<ul style="list-style-type: none"> • Deadline <p>The calibration ends on a fixed deadline. The deadline can be used to create a reference evaluation in the meantime, for instance, and to make an assessment or start a discussion.</p>
Status	<p>Shows the editing status of the calibration.</p> <p>Possible options:</p> <ul style="list-style-type: none"> • <i>Initiated</i> • <i>Started</i> • <i>Pending</i> • <i>Finished</i>
Supervisors	Shows the number of the supervisors who are involved in the calibration process.
Created by	Name of the user who has created the calibration.
Creation date	Date on which the calibration was created.

14.2

Tab Evaluations

Here, you can create, edit, and view a reference evaluation. All evaluations of the supervisors continue to be displayed. Depending on the status of the calibration, you can view the evaluations.

Details
Assigned Session
Supervisors*
Evaluations

Reference Evaluation
+




The reference evaluation has not been executed.

Evaluations	
Created By ↕	Result ↕
Agent, 80.	


Save
Reset

Fig. 107: Tab Evaluations (example)

Reference evaluation

	Create	Open the evaluation template. Enter your reference evaluation. See chapter "Create reference evaluation", p. 77
	Edit	Opens the reference evaluation. You can edit the reference evaluation until you release it. See chapter "Edit reference evaluation", p. 77
	View	Here, you can view the reference evaluation.

Evaluations


	View	Here, you can view the evaluation.
-------------------------------------------------------------------------------------	-------------	------------------------------------

**Print evaluation**

Here, you can print the evaluation. See [chapter "Print evaluation", p. 22.](#)

In the column Result, you see the result of the evaluations.

14.2.1 Create reference evaluation

1. Click on the icon  (*Create*).
⇒ The window *Evaluation* appears.
2. Create the reference evaluation on the basis of the session.
3. Click the button *Apply*.
⇒ The confirmation window appears. Decide whether you would like to release the evaluation or save it as a draft.

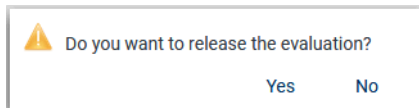



Fig. 108: Confirmation window for the reference evaluation

4. Click on the button *Yes* to release the reference evaluation.
Click on the button *No* to save the reference evaluation as a draft.
5. Click on the button *Save*.

14.2.2 Edit reference evaluation

1. Click on the icon  (*Edit*).
⇒ The window *Evaluation* appears.
2. Change the reference evaluation on the basis the session.
3. Click the button *Apply*.
⇒ The confirmation window appears. Decide whether you would like to release the evaluation or continue to save it as a draft.

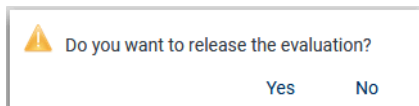


Fig. 109: Confirmation window for the reference evaluation

4. Click on the button *Yes* to release the reference evaluation.
Click on the button *No* to save the reference evaluation as a draft.
5. Click on the button *Save*.

14.3 Tab Supervisors

Here, you can add and delete supervisors and view the evaluations that the supervisors have made.

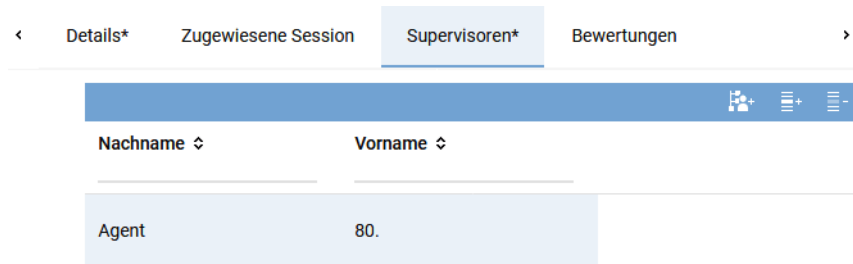






Fig. 110: Tab Supervisors (example)

	<i>Add from organization structure</i>	Opens a window in which you can add more supervisors from the organization structure. See chapter "Add supervisors from the organization structure", p. 78.
	<i>Add</i>	Here, you can add supervisors. See chapter "Add supervisors", p. 79.
	<i>Delete</i>	Deletes the selected supervisor.

14.3.1

Add supervisors from the organization structure

1. Select the tab *Supervisors* (see [chapter "Tab Supervisors", p. 77.](#)).
2. To assign a supervisor from the organization structure, click on the icon  (*Add from organization structure*).

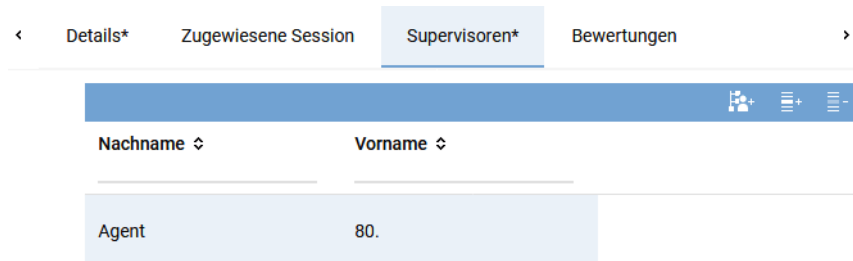




Fig. 111: Tab Supervisors (example)

3. Click on the respective name of the organization structure in the left window.
4. Select one or several supervisors from the list.
To select several supervisors or to revoke the selection, click on the respective line while holding the [Ctrl] key down.
To select all supervisors, click on the icon  (*Select all*).
To deselect all marked supervisors, click on the icon  (*Deselect all*).

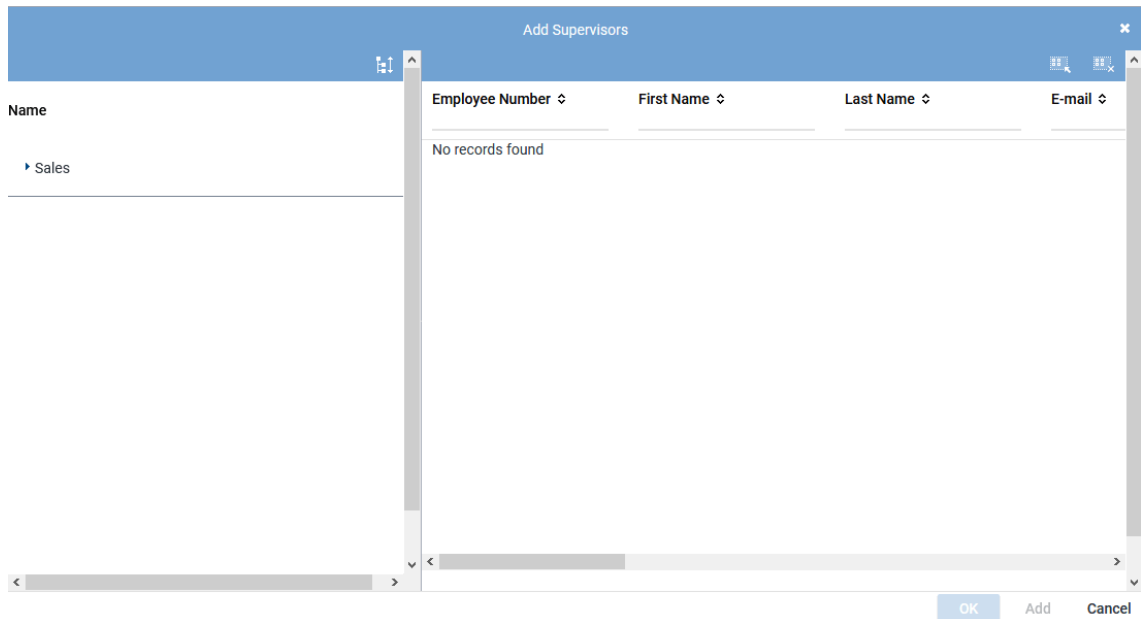



Fig. 112: Add supervisors from the organization structure

5. To add the selected supervisors and leave the window open for further adjustments, such as adding more supervisors from other organization structures, click on the button *Add*.
6. To add selected supervisors and close the window, click on the button *OK*.
To discard the selection and close the window, click on the button *Cancel*.

14.3.2 Add supervisors

1. Select the tab *Supervisors* (see [chapter "Tab Supervisors", p. 77](#)).
2. To assign a supervisors, click on the icon  (*Add*).

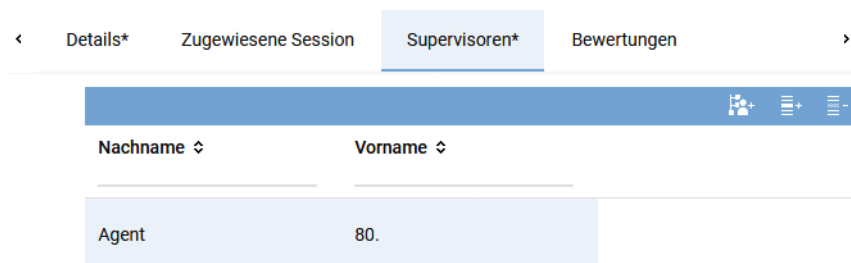


Fig. 113: Tab Supervisors

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

Supervisors

Employee Number	First Name	Last Name	Login Name	Date of Entry	Date of Birth
No records found					

Rows per page 20 0 - 0 of 0

AddCancel

Fig. 114: Add supervisors from the organization structure

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

15

Logical keyword search



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

This function allows you to search the sessions for hits.

1. Click on the menu item *Sessions > Logical Keyword Search* in the toolbar of the main view.
⇒ The window *Logical Keyword Search* appears.
2. Here, you can search the session for keywords.

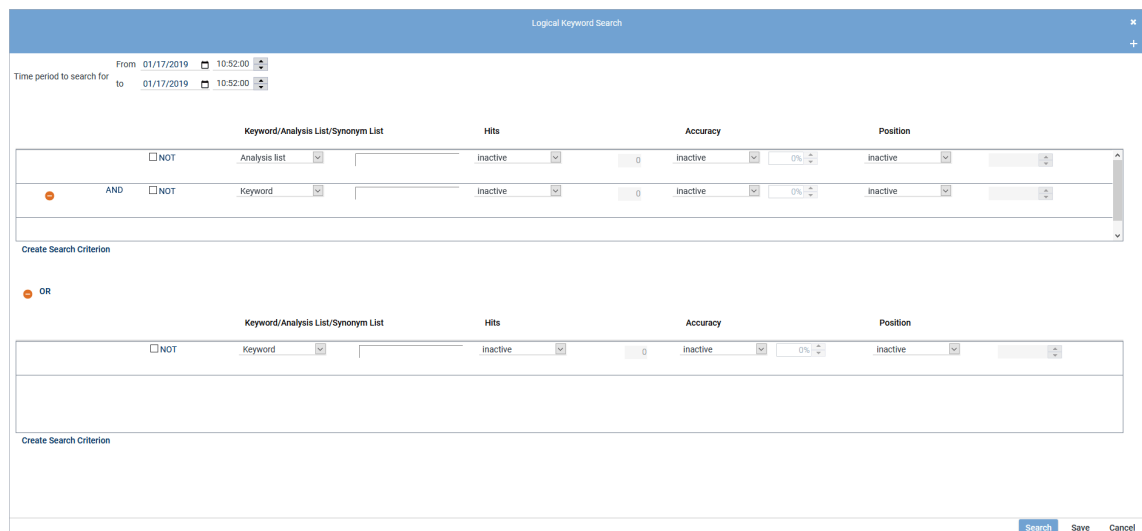




Fig. 115: Logical keyword search

The main window is divided into 2 sections:

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

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

- Keyword/Analysis List/Synonym List

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

- Keywords are entered by auto-complete. You can only enter words which have actually been found previously by an audio analysis job.
- The lists are entered by auto-complete. You can enter all lists which have previously been created in the Audio Analysis module regardless of whether this list has actually delivered hits.

- Hits

You have two options:

- *inactive* = The criterion has been deactivated.
- *equal* = The number of the actual hits exactly matches the value entered.
- *smaller or equal* = The number of the actual hits is smaller than or equal to the value entered.
- *greater or equal* = The number of the actual hits is greater than or equal to the value entered.

- Accuracy

You have two options:

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


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

- Position

You have two options:

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

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

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

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

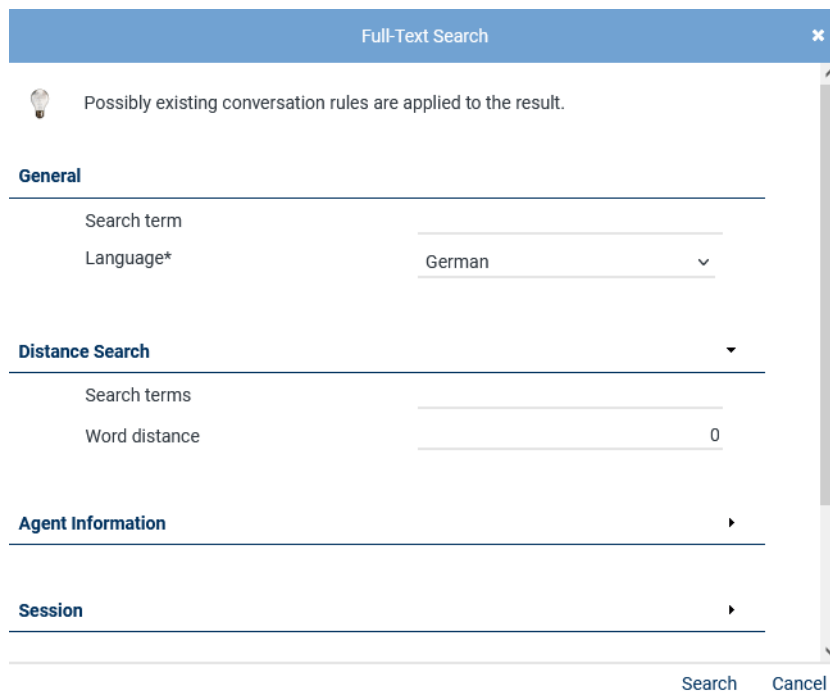
3. To run the search, click on the button *Search*.
4. To save the search, click on the button *Save*.
5. To cancel the search, click on the button *Cancel*.



This function is only available if the speech analysis software has been installed and licensed. In addition, the function *Solr* must have been activated when installing the *neo* software. Furthermore, there must already be transcribed sessions in the system.

This function allows you to search the transcribed sessions for different terms.


1. Click on the menu item *Sessions > Full-Text Search* in the toolbar of the main view.
⇒ The window *Full-Text Search* appears.




The screenshot shows the 'Full-Text Search' window. At the top, there is a blue header bar with the title 'Full-Text Search' and a close button. Below the header, a light blue box contains a lightbulb icon and the text 'Possibly existing conversation rules are applied to the result.' The main area is divided into four sections: 'General', 'Distance Search', 'Agent Information', and 'Session'. The 'General' section has a 'Search term' text field and a 'Language*' dropdown menu currently set to 'German'. The 'Distance Search' section has a 'Search terms' text field and a 'Word distance' dropdown menu set to '0'. The 'Agent Information' and 'Session' sections have expandable arrows. At the bottom right, there are 'Search' and 'Cancel' buttons.

Fig. 116: Full-text search


Different group fields to configure full-text search are available:

General	<ul style="list-style-type: none"> • Search term: Enter the term that you would like to search in the session. • Language: Select the language pack you have installed.
Distance Search	<p>Here, you can define a search for two words which appear in certain proximity of each other.</p> <ul style="list-style-type: none"> • Search terms: Enter the two words you would like to search for without delimiter. • Word distance: Enter the maximum word distance.
Agent Information	<p>Here, you can search for different information about the agent.</p>
Session	<p>Here, you can search for different parameters of the session.</p> <ul style="list-style-type: none"> • Time period to be searched: Enter the time period during which the session occurs that is supposed to be considered. You can enter the date directly in both entry fields via the keyboard or by clicking on the icon . Next to the date, you can enter the exact time. • Category: Enter the category to be searched. • Maximum/Minimum duration: Enter the maximum or minimum duration.

- **Creation date:** Enter the time period during which the session that is supposed to be considered has been created. You can enter the date directly in both entry fields via the keyboard or via the icon . Next to the date, you can enter the exact time.

CTI Informationen Here, you can search for different CTI information.

Conversation Information Here, you can search for different information about the conversation.

- To run the search, click on the button **Search**.
- To cancel the search, click on the button **Cancel**.
- In the main view, select the session the transcribed content of which you would like to display.
- Click on the icon  (**Load**).
- Select the option **Load Transcription**.
 - ⇒ The following window appears:

Transcription ×		
Time ↕	Speaker ↕	Content ↕
07/05/2019 14:52:36	Peter (1022); Hubert (1021)	Gespräch bekennt von 10 21 bis 22 der Test ist jetzt hauptsächlich für die Multi sehr Umgebung mit 181 unter 2 Wochen 9 also 4 30 gesagt wir schauen jawohl 1 und R 2 _minus auf so wie es sein soll das kontrolliere hat gerade mal auf der anderen Seite auch diesen mit einem 418 mit der 6 und an seiner Ovationen 8 auf und der 134 soll kurz Moment im ebenfalls auf sehr gut wir sagen jetzt Tisch Stuhl und lege wieder auf

Fig. 117: Transcription

The following columns are available:

Time	Date and time the session was created.
Speaker	Name of the participants of the session.
Content	Transcription of the audio.

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Glossary

MP3

Description of the digitally saved audio data. MP3 compression works by reducing (or approximating) the accuracy of certain components of sound that are considered (by psychoacoustic analysis) to be beyond the hearing capabilities of most humans. The remaining audio information is then recorded in a space-efficient manner. (Source: Wikipedia 9th July 2020)

MP4

MP4 is a video container format. MP4 file format is based on Apple QuickTime file format. MP4 files allow saving multimedia content as several audio and video tracks as well as subtitles, 2D and 3D graphics. This content may be replayed locally with a dedicated software or streamed via a network. (Source: Wikipedia 07.02.2020)

PCM

Pulse Code Modulation is an uncompressed pulse modulation method which transforms a time- and value-continuous analog signal into a time- and value-discrete digital signal. It is used in audio technology, for example in the context of the G.711 standard and in video technology for digital video signals in compliance with the ITU-R BT 601 standard. (Source: Wikipedia 12th June 2018)

TTL

Time to live is the retention period indicating for how long a recording is supposed to be held available in the system.

Video data

Video data can either consist of camera recordings of a video call or of screen recordings.

Video recording

A video recording can consist either of a screen video or of any other video.

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)

XML

Extensible Markup Language is a human-readable and machine-readable language which defines a set of rules for encoding documents.