

INSPIRATION^{neo}

Templates module



User manual

5/19/2022

Product line Neo, version 7.x

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

INSPIRATION^{neo}

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Contents

1	General information.....	5
2	Introduction.....	6
3	Calculation of the evaluation score	7
4	Toolbar of the main view.....	8
4.1	Show preview	9
4.2	Show summary	9
4.3	Search	10
5	Evaluation Templates module	12
5.1	General	12
5.2	Main view	12
5.3	Detail view	13
5.3.1	Tab Details.....	15
5.3.2	Tab Evaluations	17
5.3.2.1	Show evaluations.....	18
5.3.3	Tab Logical Dependencies	19
5.3.4	Tab Quality Alarms	20
5.3.5	Tab Header	21
5.3.6	Tab Risk Profiles.....	23
5.4	Create template	23
5.5	Edit template.....	25
5.5.1	Edit or create logical dependencies.....	28
5.5.1.1	Change logical dependency	30
5.5.1.2	Delete logical dependencies.....	31
5.5.2	Edit or create specific quality alarm	32
5.5.2.1	Tab Details.....	33
5.5.2.2	Tab Time Settings.....	35
5.5.2.3	Tab Notifications	35
5.5.2.4	Tab Agents	39
5.5.3	Delete specific quality alarm	41
6	Training Package Templates module	42
6.1	General	42
6.2	Main view	42
6.3	Detail view	43
6.3.1	Tab Details.....	44
6.3.2	Tab E-Learning Categories.....	45
6.4	Create template	46
6.5	Edit template.....	48
6.5.1	Assign existing category	49

6.5.2	Remove category assignment	50
6.5.3	Create and add new category.....	50
6.5.4	Delete category.....	51
7	Quiz Templates module	53
7.1	General	53
7.2	Main view	53
7.3	Detail view	54
7.3.1	Tab Details.....	55
7.3.2	Tab E-Learning Categories.....	55
7.3.3	Tab Quality Alarms	56
7.4	Create template	57
7.5	Edit template.....	59
7.5.1	Assign existing category	60
7.5.2	Remove category assignment	61
7.5.3	Create and add new category.....	61
7.5.4	Delete category.....	62
7.5.5	Edit or create specific quality alarm	63
7.5.5.1	Tab Details.....	64
7.5.5.2	Tab Time Settings.....	66
7.5.5.3	Tab Notifications	66
7.5.5.4	Tab Agents	70
7.5.6	Delete specific quality alarm	72
	List of figures	73
	List of tables.....	76
	Glossary	77

1 General information

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2 Introduction

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

The following templates can be created:

- Evaluation templates, see [chapter "Evaluation Templates module", p. 12](#)
- Training package templates, see [chapter "Training Package Templates module", p. 42](#)
- Quiz templates, see [chapter "Quiz Templates module", p. 53](#)

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

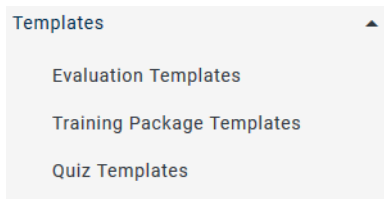


Fig. 1: Menu item Templates



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

3 Calculation of the evaluation score

Evaluation score of a question:

$(\text{answer value}) \times (\text{severity}) / (100)$

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

$(\text{sum of the evaluation score of all questions}) / (\text{number of the questions})$

Example for a section:

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

Example for the calculation:

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

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

$(\text{sum of the evaluation score of all questions})$

Example for a section:

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

Example for the calculation:

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

Score of several sections with the different section severities:

$(\text{score of the 1st section}) \times (\text{severity of the 1st section}) / (100) + (\text{score of the 2nd section}) \times (\text{severity of the 2nd section}) / (100)$

Example for sections:

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

Example for the calculation:

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

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

4 Toolbar of the main view

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

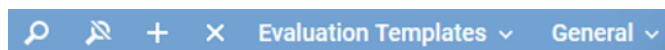







Fig. 2: Toolbar of the main view (example)

	<i>Search</i>	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see chapter "Search", p. 10 . The icon  is displayed whenever the search has been adjusted by means of a filter.
	<i>Reset search</i>	Resets all manually entered search criteria.
	<i>Create</i>	Creates a new template. Templates can be created in the following modules: <ul style="list-style-type: none"> • Evaluation Templates module, see chapter "Create template", p. 23 • Training Package Templates module, see chapter "Create template", p. 46 • Quiz Templates module, see chapter "Create template", p. 57
	<i>Delete</i>	Deletes the selected template.
<i>Evaluation Templates</i>	<i>Remove Edit Locks</i>	Checks whether there is an edit lock for the selected template. If there is a lock, you can remove it by confirming the security prompt.
	<i>Make Template Visible or Not Visible</i>	By clicking on this button, the user can show or hide the selected template.
	<i>Show Preview</i>	Shows a preview of the selected template, see chapter "Show preview", p. 9 .
	<i>Summary</i>	Shows a summary of the selected template, see chapter "Show summary", p. 9 .
<i>General</i>	<i>Print Evaluation Template</i>	Prints the selected template.
	<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>	Opens the online help.
	<i>Module Help</i>	Opens the module-specific online help.



Not all described icons exist in every module and application.

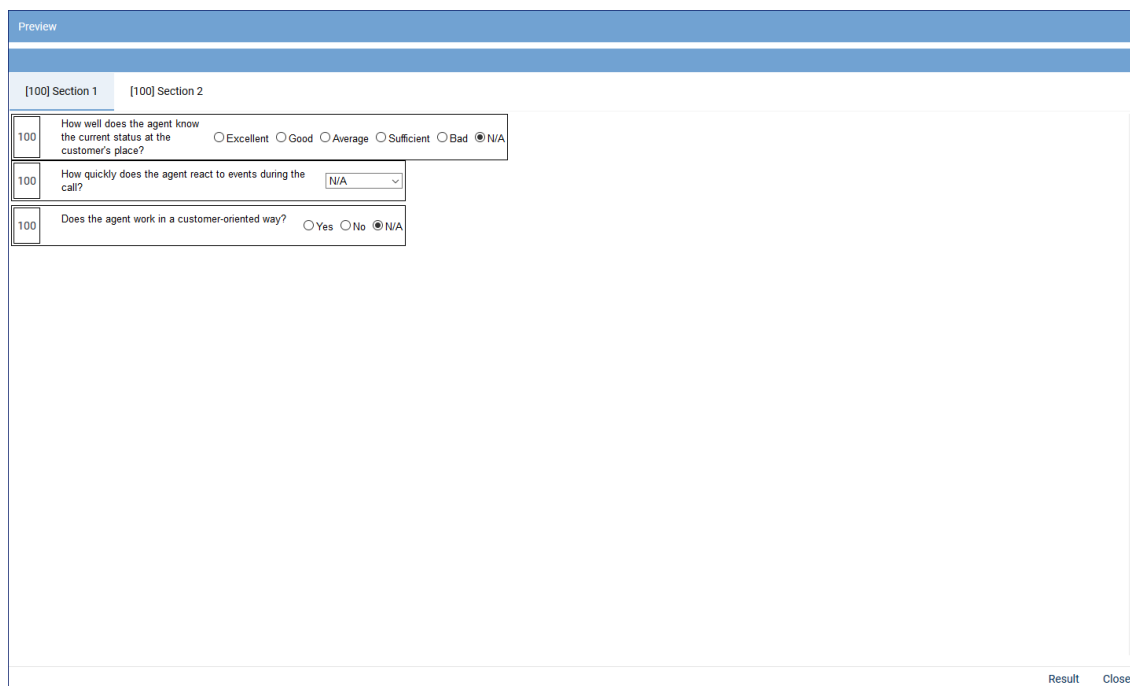


In the user manual *INSPIRATIONneo - General information*, you find detailed descriptions of the default functions such as *Print*, *Adjust table* or *Help* if required.

4.1 Show preview

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

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



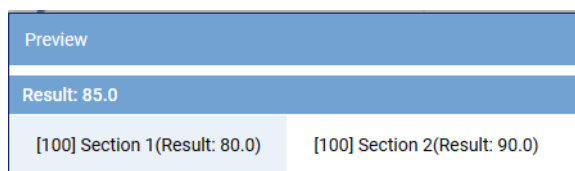
The 'Preview' window displays a form with two tabs: '[100] Section 1' and '[100] Section 2'. The form contains three questions, each with a score of 100 in a small box on the left:

- Question 1: "How well does the agent know the current status at the customer's place?" with radio buttons for Excellent, Good, Average, Sufficient, Bad, and N/A (selected).
- Question 2: "How quickly does the agent react to events during the call?" with a dropdown menu showing 'N/A'.
- Question 3: "Does the agent work in a customer-oriented way?" with radio buttons for Yes, No, and N/A (selected).

At the bottom right of the window are buttons for 'Result' and 'Close'.

Fig. 3: Preview

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



The 'Preview' window now shows the results of the evaluation. The overall result is displayed in a blue bar at the top: 'Result: 85.0'. Below this, the results for the individual sections are shown in a table:

Section	Result
[100] Section 1	80.0
[100] Section 2	90.0

Fig. 4: Preview result

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

4.2 Show summary

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




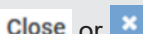

1. Select the template in the main view.
2. Click on the menu item *Evaluations > Summary* in the toolbar of the main view.
 - ⇒ The window *Summary* appears.

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

Print Close

Fig. 5: Load summary (example)



The following functions are available:

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

4.3

Search

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


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

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



Fig. 6: Window Search Criteria (example)

- Set the respective search criteria.
NOTICE! It depends on the respective module which search criteria are available.
- To start the search, click on the button *Search*.
To reset all manually entered search criteria, click on the button *Reset*.

⇒ After running the search, only those sets of data are displayed in the main view which meet the set search criteria.

4. To display all original sets of data in the main view again, i. e. to reset the manually entered search criteria, click on the 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 *INSPIRATION\$-neo\$ - General information*.

5 Evaluation Templates module

5.1 General

In the Evaluation Templates module, you can create, edit, and administrate evaluation templates according to your requirements. Evaluation templates are the basis on which the quality of the activity of the agents can be evaluated.

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

Creation of an evaluation template

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

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

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

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

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

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

Editing previously released templates

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

5.2 Main view

Click on the menu item *Templates* and the submenu item *Evaluation Templates* in the navigation bar to open the table of the main view. In the main view, all saved evaluation templates are displayed.

+ x Evaluation Templates v General v							
Template Type v	Name v	Visible v	Version v	Agent Feedback v	Status v	Cloned From v	New Version Of v
<input checked="" type="checkbox"/>	Agent evaluation phone		1				
<input checked="" type="checkbox"/>	Default, Default 80.0 88.33		1				
<input checked="" type="checkbox"/>	Agentenbewertung Telefon		1				
<input checked="" type="checkbox"/>	Evaluation team AB campaign xy		1				

Rows per page 50 1 - 6 of 6

Fig. 7: Evaluation templates - main view (example)

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

<i>Template Type</i>	Shows the type of the template. <input checked="" type="checkbox"/> = evaluation template
<i>Name</i>	Name of the template
<i>Visible</i>	Shows whether the template is visible for other users. = Template is visible. = Template is invisible.
<i>Version</i>	Version number of the template
<i>Agent Feedback</i>	Shows whether the template has been released for agent feedback.
<i>Status</i>	Shows the editing status of the template. = Template has been released. = Template is a draft. = Template has been deactivated.
<i>Cloned From</i>	Name of the template from which this template has been cloned (function <i>Create</i> > <i>Create Clone</i>).
<i>New Version Of</i>	Name of the template which has been the basis for the new template (function <i>Create</i> > <i>Create New Version</i>).
<i>Creation Date</i>	Shows the date on which the template was created.
<i>Updated</i>	Shows the date on which the template was updated for the last time.

5.3 Detail view

Click on an element in the table of the main view to display additional information about as well as functions of the selected template in the detail view.

Evaluation team AB campaign xy

Details*
Evaluations
Logical Dependencies
Quality Alarms
Header

Edit Content

Template type

Name*
(max. 255 characters)

Evaluations

Evaluation type

Agent feedback activated

Activate time limit

Visible

Status

Created by

Creation date

Version

Cloned from

New version of

Period of validity

Start date*

End date*

Scoring

Overall result

All scores for evaluator

Evaluation

Evaluation team AB campaign xy

0

Call

☒

☐ 0 Day(s)

☒

Draft

Admin, 1st-Tenant

11/21/2018 11:48:08 AM

1

☐

☐

☒ Average

☐ Minimum

☐ Maximum

☒ Average

☐ Minimum

☐ Maximum

☐

Save

Reset

Fig. 8: Evaluation templates - detail view

The detail view consists of the following tabs:

- Details**
Here, you can display and edit detailed information about the selected template.
See [chapter "Tab Details", p. 15](#).
- Evaluations**
Here, all finished evaluations based on the selected template are displayed.
See [chapter "Tab Evaluations", p. 17](#).
- Logical Dependencies**
Here, you can display and edit the dependencies between individual elements of the template.
See [chapter "Tab Logical Dependencies", p. 19](#)

- *Quality Alarms*

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

See [chapter "Tab Quality Alarms"](#), p. 20.

- *Header*

Here, you can display and edit which information is displayed in the header of the evaluation template.

See [chapter "Tab Header"](#), p. 21.

- *Risk Profiles*

Here, you can configure a risk profile for the evaluation template which is applied to the performance of the agents.

See [chapter "Tab Risk Profiles"](#), p. 23.

5.3.1 Tab Details

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

Details*
Evaluations
Logical Dependencies
Quality Alerts

Help

Edit Content

Template type
Name*
(max. 255 characters)

Evaluations
evaluation type
Agent feedback activated
Activate time limit.

Visible
Status
Created by
Creation date
Version
Cloned from
New version of
Period of validity
Start date*
End date*

Scoring

Overall result

Evaluation
Evaluation team AB campaign xy

0
Call

☒
☐ Day(s)

☒
Draft

Admin, 1st-Tenant
11/21/2016 11:48:05 AM
1

☐


☒ Average
☐ Minimum
☐ Maximum

☒ Average
☐ Minimum
☐ Maximum

☐

Fig. 9: Details (example)

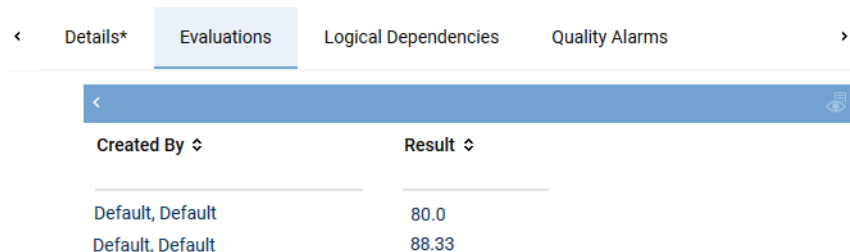
<i>Template type</i>	Shows the type of the template.
<i>Name</i>	<p>Name of the template. Enter the name of the template here.</p> <p>NOTICE! To avoid confusion, a new template cannot be saved under the same name as an already existing one. Enter an unambiguous name for the template.</p>
<i>Evaluations</i>	Number of the finished evaluations based on the template.
<i>Evaluation type</i>	<p>Shows to which evaluation type the template can be applied.</p> <p>Select for which type of evaluation the template is supposed to be valid.</p> <p>The following evaluation types can be selected:</p> <ul style="list-style-type: none"> • <i>Call</i> (only phone call)

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

	<ul style="list-style-type: none"> • <i>Average</i>: The score is an average value. • <i>Minimum</i>: The lowest score is displayed as score of the section. • <i>Maximum</i>: The highest score is displayed as score of the section.
Overall result	<p>Shows according to which scheme the overall result of the template has been calculated. The following options are available:</p> <ul style="list-style-type: none"> • <i>Average</i>: The overall result of the template results from the average of all scores that have been achieved in the individual sections. • <i>Minimum</i>: The lowest score that has been reached in a section is displayed as the overall result of the template. • <i>Maximum</i>: The highest score that has been reached in a section is displayed as the overall result of the template. <p><input checked="" type="checkbox"/> = Option selected. <input type="checkbox"/> = Option not selected.</p>
All scores for evaluator	<p>Shows whether the evaluator is displayed all values (the average as well as the highest and the lowest scores).</p> <p><input checked="" type="checkbox"/> = Evaluator is displayed all values. <input type="checkbox"/> = Evaluator is displayed only those values selected under <i>Scoring</i> and <i>Overall result</i>.</p>


5.3.2 Tab Evaluations

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



<	Details*	Evaluations	Logical Dependencies	Quality Alarms	>
Created By ↕		Result ↕			
Default, Default		80.0			
Default, Default		88.33			


Fig. 10: Evaluations (reduced view)

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



Agent evaluation phone					
<	Details*	Evaluations	Logical Dependencies	Quality Alarms	>
Agent Name ↕	Created By ↕	Template Name ↕	Status ↕	Kind Of Evaluation ↕	Agent Feedback ↕
Agent 2.	Admin, 1st-Tenant	Evaluation team AB campaign xy		<input checked="" type="checkbox"/>	
Agent 3.	Admin, 1st-Tenant	Agentenbewertung Telefon		<input checked="" type="checkbox"/>	

Fig. 11: Evaluations (expanded view)

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

Agent Name	Name of the evaluated agent
Created By	Name of the user who has made the evaluation.
Template Name	Name of the template

<i>Status</i>	Shows whether the evaluation has already been released or still is a draft. 🔓 = Evaluation has been released. 🔒 = Evaluation is a draft.
<i>Kind of Evaluation</i>	Shows the kind of evaluation. 📄 = first evaluation 📄+ = re-evaluation 📄✅ = reference evaluation 📄🔧 = calibration evaluation
<i>Agent Feedback</i>	Shows whether the agent has already given a feedback to the evaluation. 📄 = no agent feedback available ! = Agent feedback available. Agent does not agree with the evaluation. ✅ = Agent feedback available. Agent agrees with the evaluation.
<i>Conversation Type</i>	Shows the conversation type of the evaluation.
<i>Contains Note</i>	Shows whether the evaluation contains a note.
<i>Call ID</i>	Shows the call ID which serves to map the evaluation to the call.
<i>Result</i>	Shows the result (achieved score) of the evaluation.

5.3.2.1 Show evaluations

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

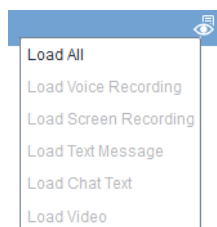
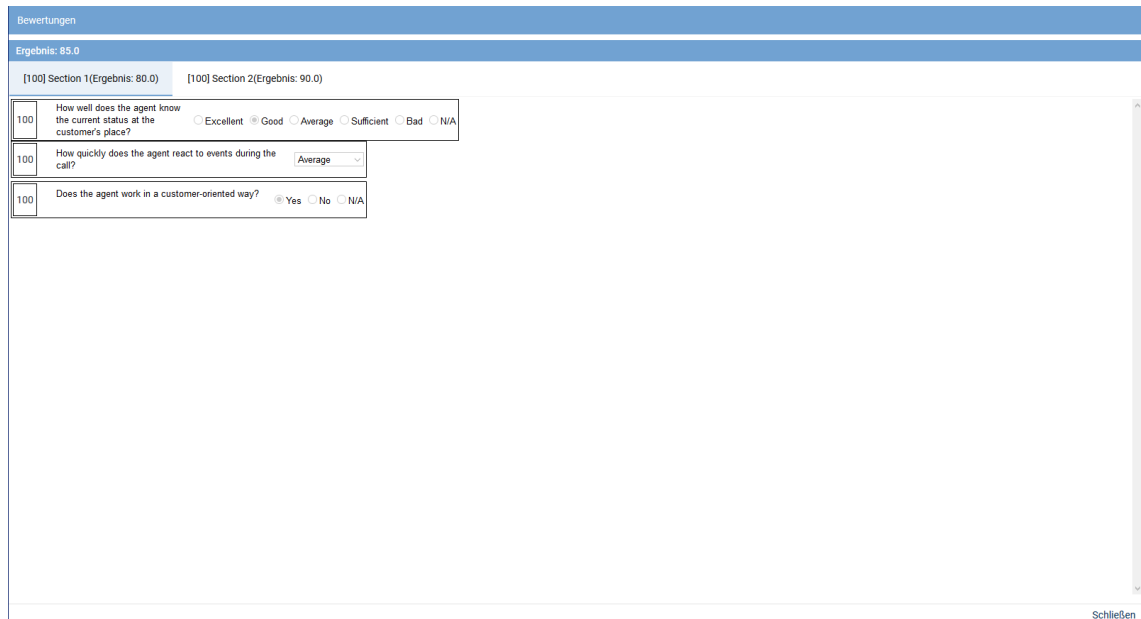


Fig. 12: Menu items View

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



Bewertungen

Ergebnis: 85.0

[100] Section 1 (Ergebnis: 80.0) [100] Section 2 (Ergebnis: 90.0)

100	How well does the agent know the current status at the customer's place?	<input type="radio"/> Excellent <input checked="" type="radio"/> Good <input type="radio"/> Average <input type="radio"/> Sufficient <input type="radio"/> Bad <input type="radio"/> N/A
100	How quickly does the agent react to events during the call?	Average
100	Does the agent work in a customer-oriented way?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A

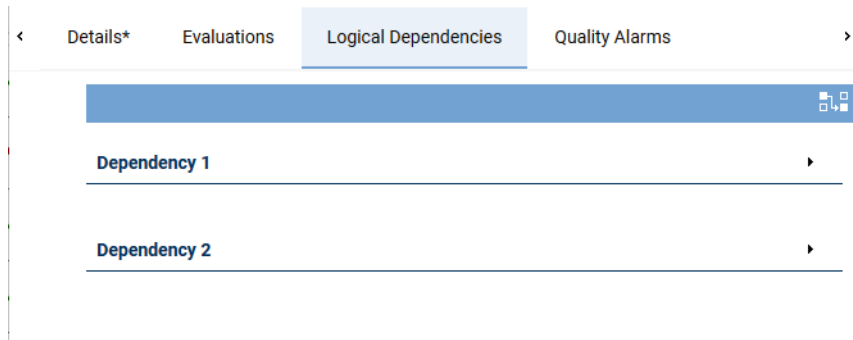
Schließen

Fig. 13: Evaluation (example)

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

5.3.3 Tab Logical Dependencies

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



< Details* Evaluations **Logical Dependencies** Quality Alarms >

⌵

Dependency 1 ▶

Dependency 2 ▶

Fig. 14: Logical Dependencies

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

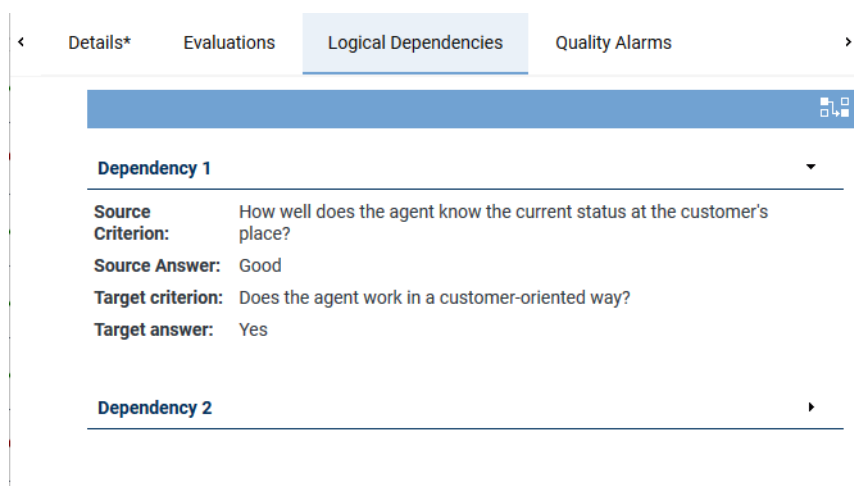




Fig. 15: Logical dependencies, information

- To hide information of a logical dependency, click on the icon  next to the name of the logical dependency.
- To define new dependencies or edit existing ones (see [chapter "Edit or create logical dependencies", p. 28](#)), click on the icon  (*Edit*).

5.3.4 Tab Quality Alarms

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

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

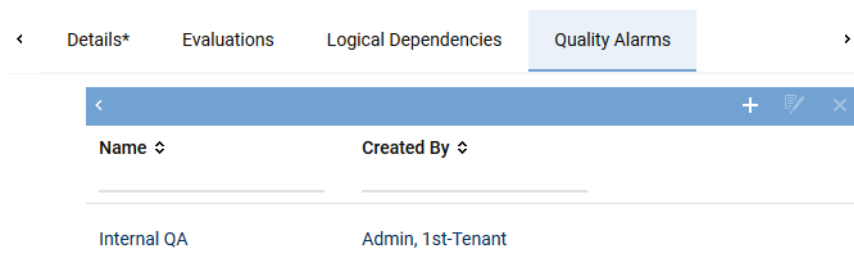




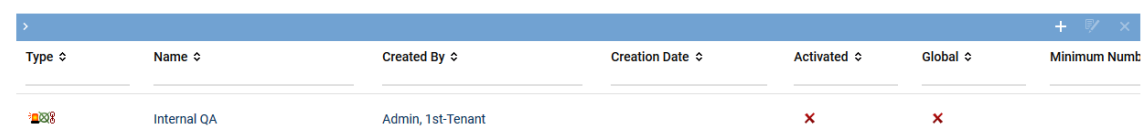


Fig. 16: Quality alarms (reduced view)

	Create	Creates a new quality alarm, see chapter "Edit or create specific quality alarm", p. 32 .
	Edit specific quality alarm	Opens the selected quality alarm for editing, see chapter "Edit or create specific quality alarm", p. 32 .
	Delete	Deletes the selected quality alarm, see chapter "Delete specific quality alarm", p. 41 .

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















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

Fig. 17: Quality alarms (expanded view)

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

<i>Type</i>	Type of the quality alarm  = global quality alarm for evaluation template  = specific quality alarm for evaluation template
<i>Name</i>	Name of the template
<i>Created By</i>	Name of the user who has created the quality alarm.
<i>Creation Date</i>	Date on which the quality alarm was created.
<i>Activated</i>	Shows whether the quality alarm has been activated.  = Quality alarm has been activated.  = Quality alarm has been deactivated.
<i>Global</i>	Shows whether a global quality alarm has been released for all or only for selected evaluation templates.  = Global quality alarm has been released for all evaluation templates.  = Global quality alarm has been released for selected evaluation templates only.
<i>Minimum number of evaluations</i>	Shows how many evaluations have to be made at least before the quality alarm is analyzed.
<i>Per Agent</i>	Shows whether the quality alarm is supposed to be applied to individual agents. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to individual agents. <input type="checkbox"/> = Apply to all selected agents.
<i>All Agents</i>	Shows whether the quality alarm is valid for all agents.  = valid for all agents  = not valid for all agents
<i>Monitored Score</i>	Shows the monitored score.
<i>Rating Scheme</i>	Shows the selected rating scheme.
<i>Updated</i>	Shows the point in time when the quality alarm was updated for the last time.

5.3.5

Tab Header

Here, you can display and edit which information is displayed in the header of the evaluation template. You can display different information for evaluation from the database or manually enter an individual note. Furthermore, you can define at which point throughout the evaluation process the information is supposed to be displayed in the header.

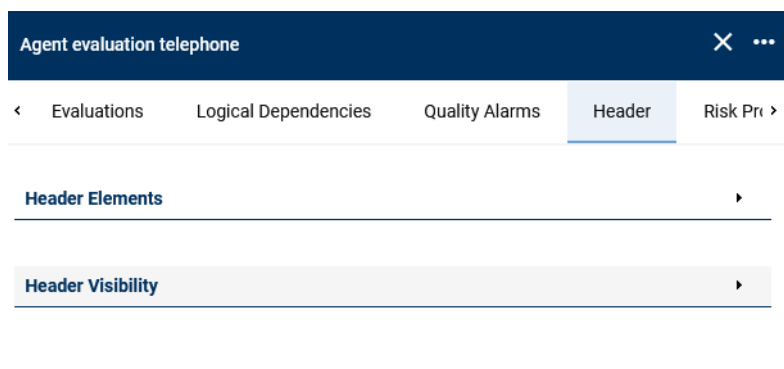



Fig. 18: Header (example)

Group field Header Elements

1. To show elements which can be displayed in the header, click on the icon  next to the group field *Header Elements*.




Header Elements 	
Agent information	<input checked="" type="checkbox"/>
Evaluation type	<input checked="" type="checkbox"/>
Created by	<input checked="" type="checkbox"/>
Creation date	<input checked="" type="checkbox"/>
Updated	<input type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Release date	<input checked="" type="checkbox"/>
Feedback status	<input checked="" type="checkbox"/>
Result	<input checked="" type="checkbox"/>
Template name	<input checked="" type="checkbox"/>
Template creator	<input type="checkbox"/>
Conversation type	<input type="checkbox"/>
Session start time	<input type="checkbox"/>
Session end time	<input type="checkbox"/>
Session duration	<input type="checkbox"/>
Session comment	<input type="checkbox"/>
Note	<input type="checkbox"/>

Fig. 19: Group field Header Elements (example)

2. To hide elements which can be displayed in the header, click on the icon  next to the group field *Header Elements*.
3. To display other elements in the header or to remove already displayed elements, activate or deactivate the corresponding check box.

Group field Header-Visibility

To define when the elements are supposed be displayed in the header, click on the icon  next to the group field *Header Visibility*.



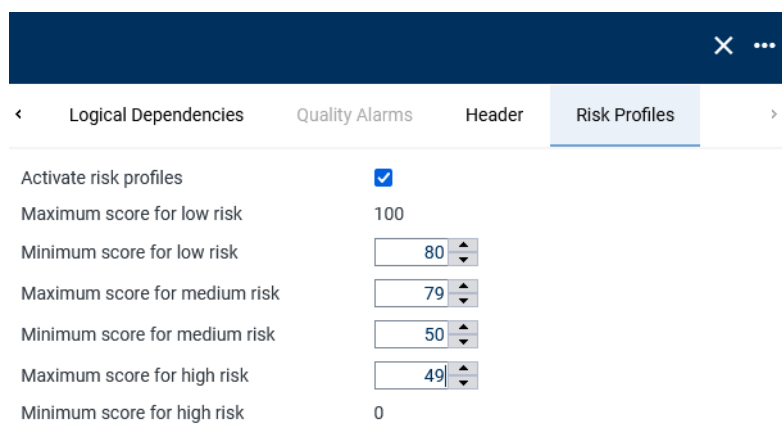
Header Visibility 	
Display header for evaluations	<input type="checkbox"/>
Display header for summary	<input checked="" type="checkbox"/>

Fig. 20: Group field Header Visibility (example)

1. To hide the information when the elements are displayed in the header, click on the icon  next to the group field *Header Visibility*.
2. To define when the elements are supposed be displayed in the header, activate or deactivate the corresponding check box.

5.3.6 Tab Risk Profiles

Here, you can configure a risk profile for the evaluation template which is applied to the performance of the agents. Depending on the achieved score in an evaluation on basis of this evaluation template, agents can be categorized into the three risk profiles low, medium, high. Risk profiles can be used in the evaluation process to make a first selection of sessions so that evaluators can focus on agent sessions with a high risk profile.




The screenshot shows a configuration window with a dark blue header bar containing a close button (X) and a menu button (three dots). Below the header is a tab bar with four tabs: 'Logical Dependencies', 'Quality Alarms', 'Header', and 'Risk Profiles' (which is selected). The 'Risk Profiles' tab contains the following settings:

- Activate risk profiles: ☒
- Maximum score for low risk: 100
- Minimum score for low risk: 80 (with up/down arrows)
- Maximum score for medium risk: 79 (with up/down arrows)
- Minimum score for medium risk: 50 (with up/down arrows)
- Maximum score for high risk: 49 (with up/down arrows)
- Minimum score for high risk: 0

Fig. 21: Risk profiles (example)

<i>Activate risk profiles</i>	Tick the check box to activate the risk profiles for this evaluation template.
<i>Minimum score for...</i>	Enter the minimum score from which a risk profile of the respective category is supposed to apply.
<i>Maximum score for...</i>	Enter the maximum score up to which a risk profile of the respective category is supposed to apply.

5.4 Create template

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

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

3. The template generator opens:

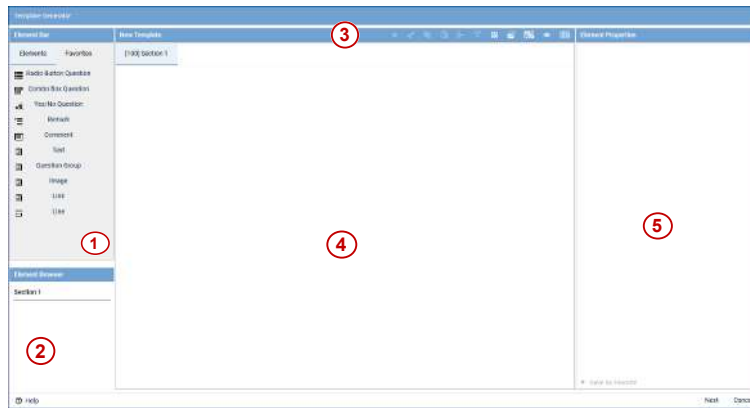


Fig. 22: Create template (example)

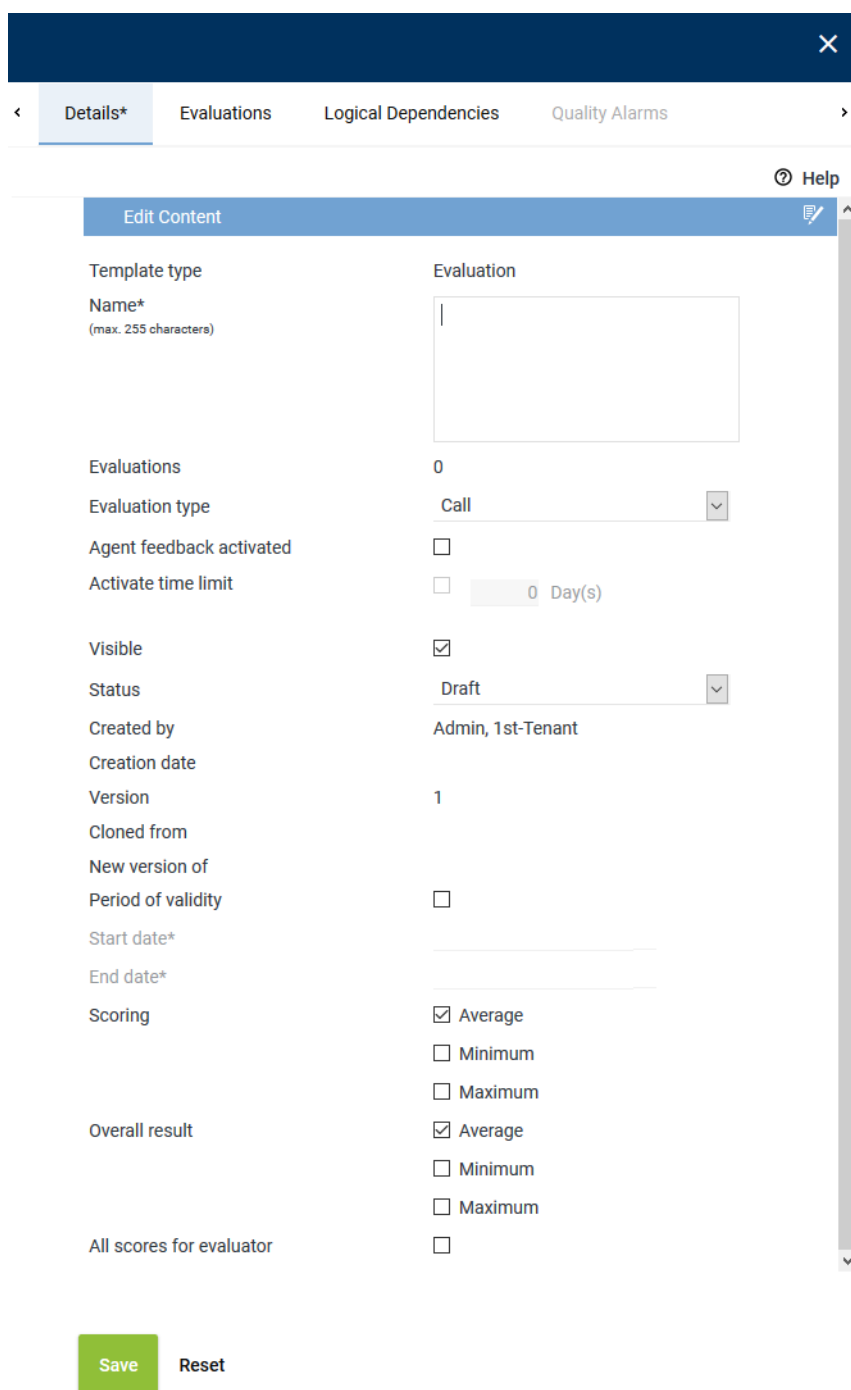
1	<p>Element bar</p> <p>This area on the left side of the window contains the elements which are used to create templates.</p> <p>See Element bar.</p>
2	<p>Element browser</p> <p>In this area, an overview of the template's sections as well as the elements they contain is displayed.</p> <p>See Element browser and Add new section.</p>
3	<p>Toolbar</p> <p>This area contains the available control functions.</p> <p>See Toolbar of the template generator.</p>
4	<p>Working area</p> <p>Here, you arrange the elements.</p>
5	<p>Element properties</p> <p>In this area, you define the details of the selected elements.</p> <p>See Element properties.</p>

4. Set up the template according to your requirements.



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

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



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


Save Reset

Fig. 23: Create template - detail view (example)

7. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 15.
 - *Evaluations*, see [chapter "Tab Evaluations"](#), p. 17.
 - *Logical Dependencies*, see [chapter "Tab Logical Dependencies"](#), p. 19.
 - *Quality Alarms*, see [chapter "Tab Quality Alarms"](#), p. 20.
8. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button **Cancel**.

5.5 Edit template

1. Select a template in the main view.

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



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

3. Set up the template according to your requirements.



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

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

×

<

Details*

Evaluations

Logical Dependencies

Quality Alarms

>

Help

Edit Content

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

Save

Reset

Fig. 24: Create template - detail view (example)

6. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 15.
 - *Evaluations*, see [chapter "Tab Evaluations"](#), p. 17.
 - *Logical Dependencies*, see [chapter "Tab Logical Dependencies"](#), p. 19.
 - *Quality Alarms*, see [chapter "Tab Quality Alarms"](#), p. 20.
7. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button **Cancel**.

5.5.1 Edit or create logical dependencies



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




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



Logical dependencies cannot be defined across sections.



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

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

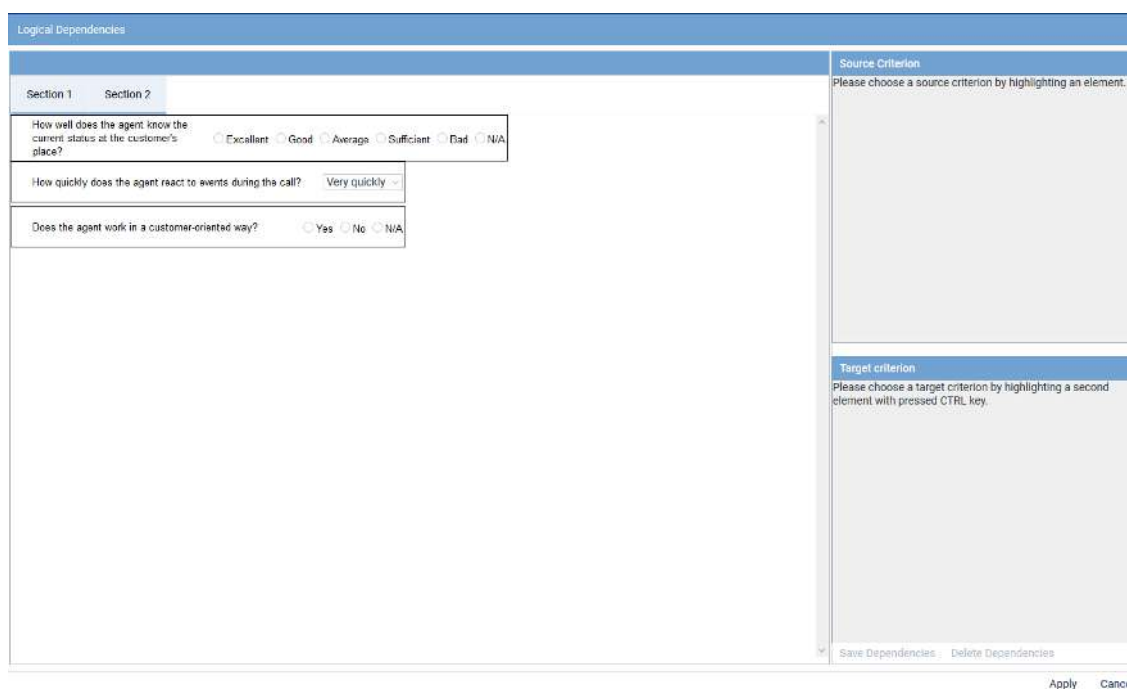


Fig. 25: Define logical dependencies

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

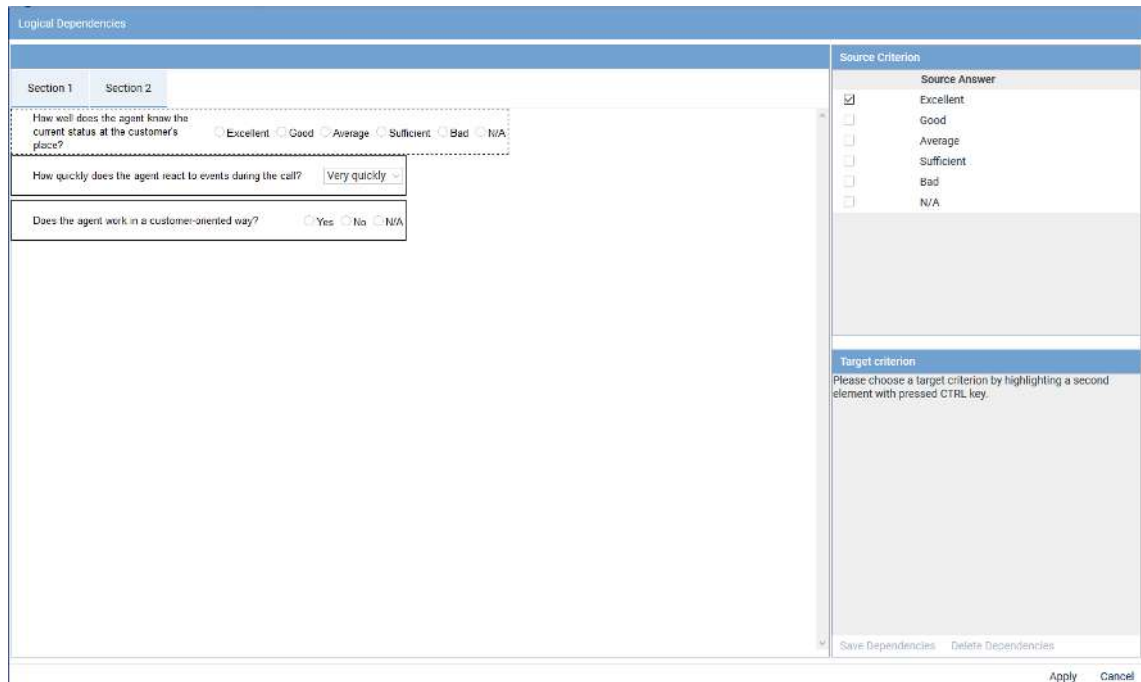


Fig. 26: Logical dependencies - define source criterion

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

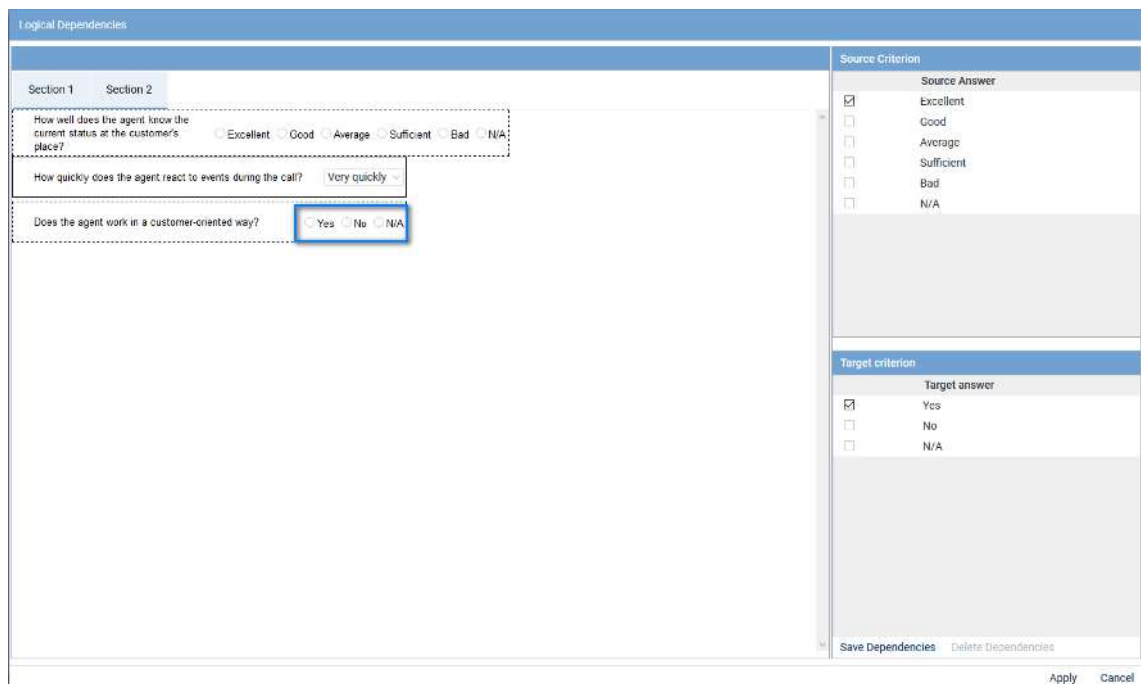


Fig. 27: Logical dependencies - define target criterion

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

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

5.5.1.1 Change logical dependency

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

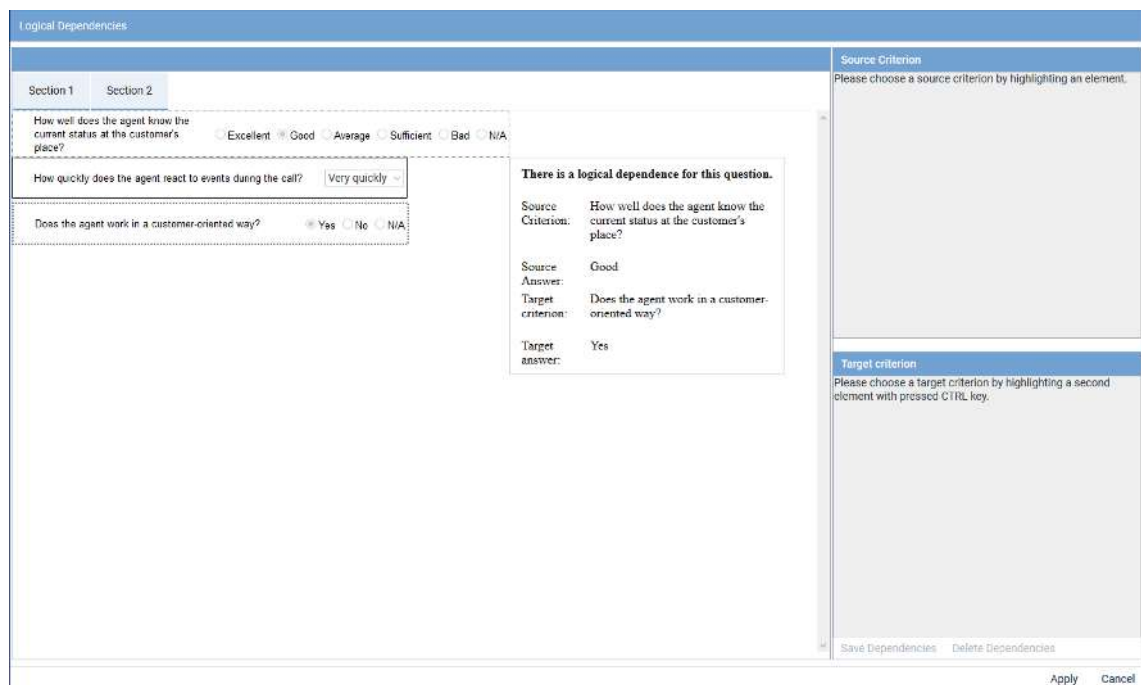


For saved dependencies you cannot change the assignment of the elements. To remove the dependency between 2 elements, you have to delete the defined dependency, see [chapter "Delete logical dependencies", p. 31](#).



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

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



The screenshot shows the 'Logical Dependencies' window with two sections: 'Section 1' and 'Section 2'. In 'Section 1', there are three criteria: 'How well does the agent know the current status at the customer's place?' (radio buttons: Excellent, Good, Average, Sufficient, Bad, N/A), 'How quickly does the agent react to events during the call?' (dropdown: Very quickly), and 'Does the agent work in a customer-oriented way?' (radio buttons: Yes, No, N/A). In 'Section 2', a dependency is shown for the 'Does the agent work in a customer-oriented way?' criterion. The dependency details are: Source Criterion: 'How well does the agent know the current status at the customer's place?', Source Answer: 'Good', Target criterion: 'Does the agent work in a customer-oriented way?', Target answer: 'Yes'. On the right, there are panels for 'Source Criterion' and 'Target criterion' with instructions to choose a criterion by highlighting an element. At the bottom, there are buttons for 'Save Dependencies', 'Delete Dependencies', 'Apply', and 'Cancel'.

Fig. 28: Show logical dependency

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

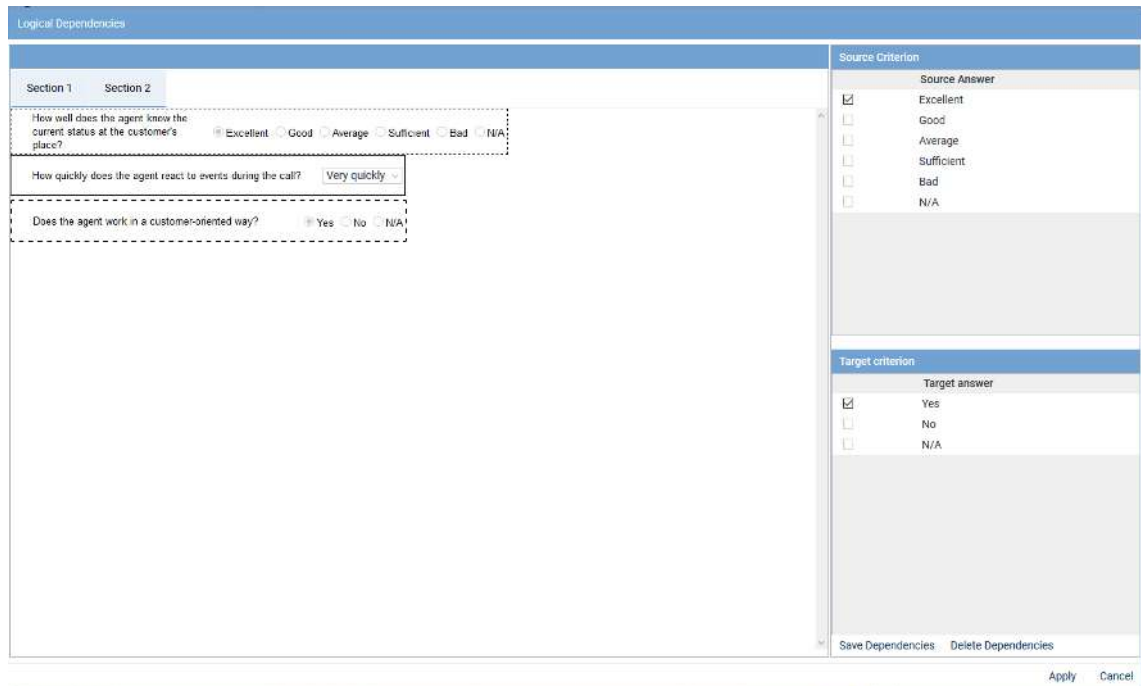
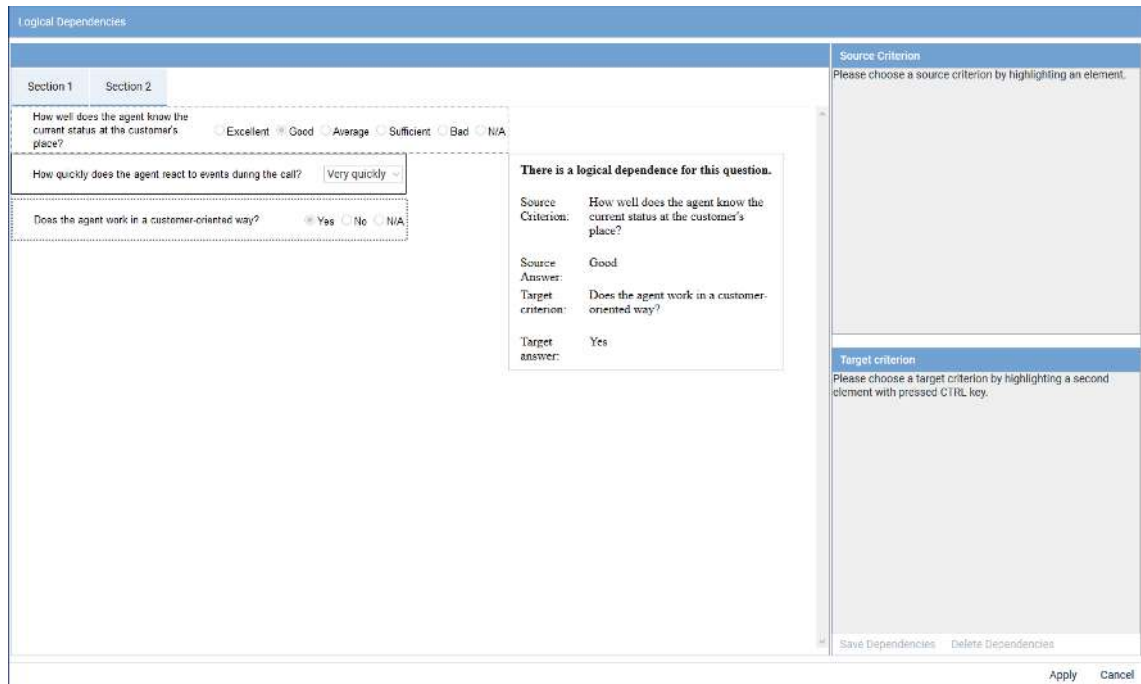


Fig. 29: Change logical dependency

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

5.5.1.2 Delete logical dependencies

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



Logical Dependencies

Section 1 Section 2

How well does the agent know the current status at the customer's place? ☐ Excellent ☒ Good ☐ Average ☐ Sufficient ☐ Bad ☐ N/A

How quickly does the agent react to events during the call?

Does the agent work in a customer-oriented way? ☒ Yes ☐ No ☐ N/A

There is a logical dependence for this question.

Source Criterion: How well does the agent know the current status at the customer's place?

Source Answer: Good

Target criterion: Does the agent work in a customer-oriented way?

Target answer: Yes

Source Criterion: Please choose a source criterion by highlighting an element.

Target criterion: Please choose a target criterion by highlighting a second element with pressed CTRL key.



Save Dependencies Delete Dependencies

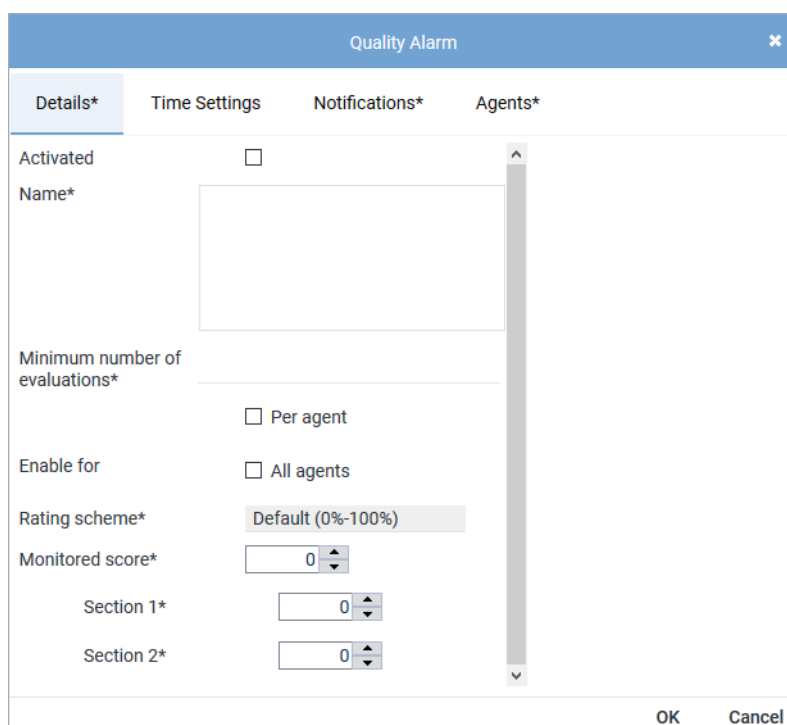
Apply Cancel

Fig. 30: Show logical dependency

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

5.5.2 Edit or create specific quality alarm

1. Select the tab *Quality Alarms*, see [chapter "Tab Quality Alarms", p. 20](#).
2. To define a new specific quality alarm, click on the icon  (*Create*).
To edit an existing specific quality alarm, select the specific quality alarm in the list and click on  (*Edit specific quality alarm*).
⇒ The following window appears:



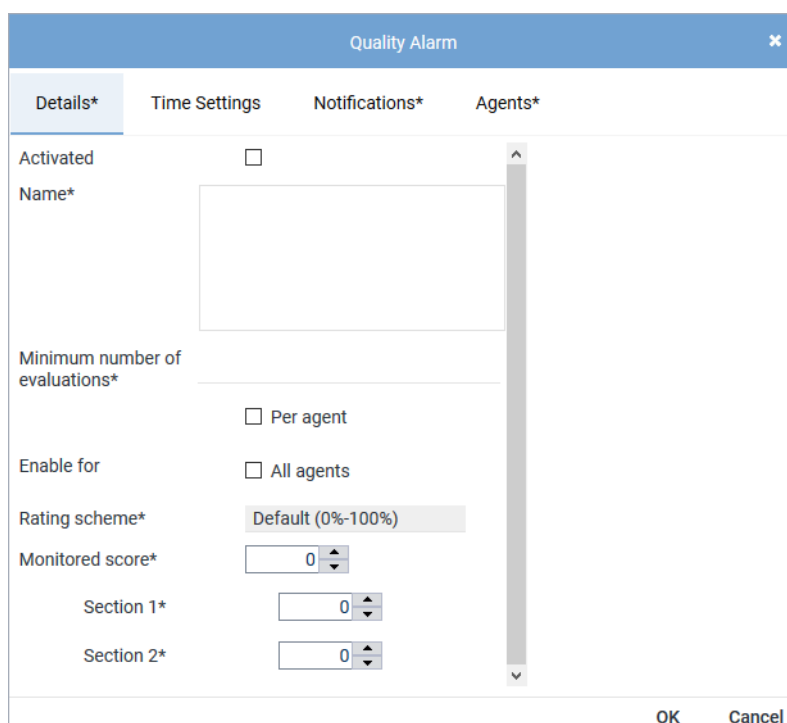
The image shows a 'Quality Alarm' dialog box with a blue header bar containing the title and a close button. Below the header are four tabs: 'Details*', 'Time Settings', 'Notifications*', and 'Agents*'. The 'Details*' tab is selected. It contains the following fields: 'Activated' with a checkbox, 'Name*' with a large text input area, 'Minimum number of evaluations*' with a checkbox for 'Per agent', 'Enable for' with a checkbox for 'All agents', 'Rating scheme*' with a dropdown menu showing 'Default (0%-100%)', 'Monitored score*' with a numeric input field set to 0, 'Section 1*' with a numeric input field set to 0, and 'Section 2*' with a numeric input field set to 0. At the bottom right are 'OK' and 'Cancel' buttons.

Fig. 31: Create or edit specific quality alarm

3. Adjust all necessary settings within the 4 tabs.
 - *Details*, see [chapter "Tab Details", p. 33](#)
 - *Time Settings*, see [chapter "Tab Time Settings", p. 35](#)
 - *Notifications*, see [chapter "Tab Notifications", p. 35](#)
 - *Agents*, see [chapter "Tab Agents", p. 39](#).
4. To save the settings, click on the button *OK*.
To discard the settings or the changes and close the window, click on the button *Cancel*.

5.5.2.1 Tab Details

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



The image shows a 'Quality Alarm' dialog box with a 'Details*' tab selected. The dialog has a title bar with a close button. The 'Details*' tab is active, showing fields for 'Activated' (checkbox), 'Name*' (text input), 'Minimum number of evaluations*' (text input), 'Enable for' (checkboxes for 'Per agent' and 'All agents'), 'Rating scheme*' (dropdown menu showing 'Default (0%-100%)'), 'Monitored score*' (spin box with '0'), 'Section 1*' (spin box with '0'), and 'Section 2*' (spin box with '0'). There are 'OK' and 'Cancel' buttons at the bottom right.

Fig. 32: Specific quality alarm - define details

Activated	Shows whether the quality alarm has been activated. Select whether the quality alarm is supposed to be activated. <input checked="" type="checkbox"/> = Quality alarm has been activated. <input type="checkbox"/> = Quality alarm has been deactivated.
Name	Name of the quality alarm. Enter the name of the quality alarm here.
Minimum number of evaluations	Shows how many evaluations have to be made at least before the quality alarm is analyzed. Enter the number of the necessary evaluations.
Per Agent	Shows whether the quality alarm is supposed to be applied to individual agents. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to individual agents. <input type="checkbox"/> = Apply to all selected agents.
All Agents	Here, you can define whether the quality alarm is supposed to be applied to all agents known to the system. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to all agents. <input type="checkbox"/> = Apply only to the assigned agents. (Assign agents see chapter "Tab Agents", p. 39)
Rating Scheme	Shows which rating scheme is used. (The displayed value cannot be changed.)
Monitored Score	Shows the total score which is monitored as threshold value. Enter a score for the threshold value.
Section 1	If sections have been created in the template, then the sections' score is displayed here which is monitored as threshold value. Enter a score for the threshold value.

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

5.5.2.2 Tab Time Settings

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

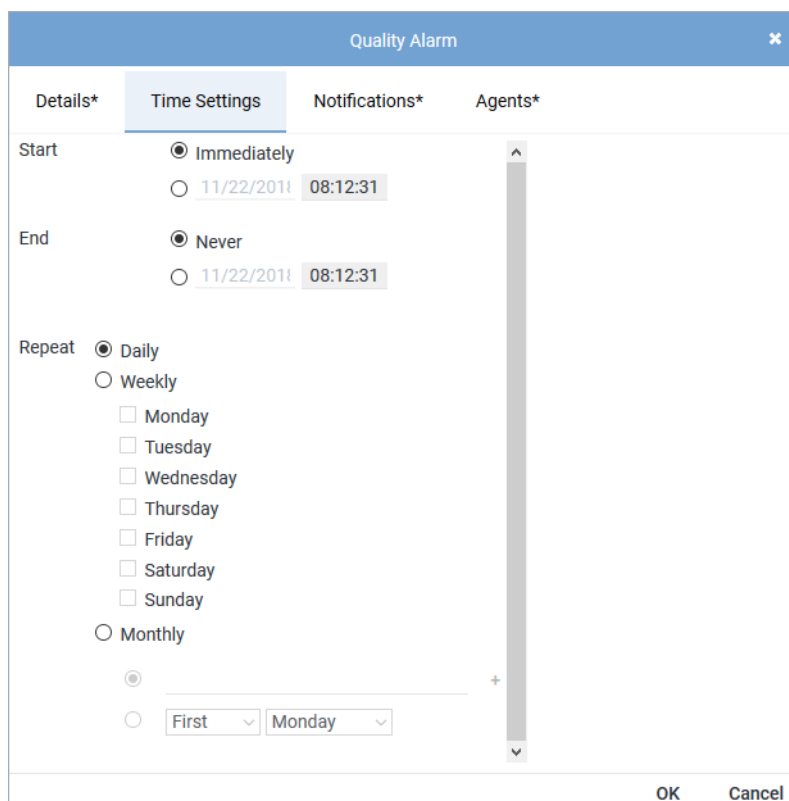
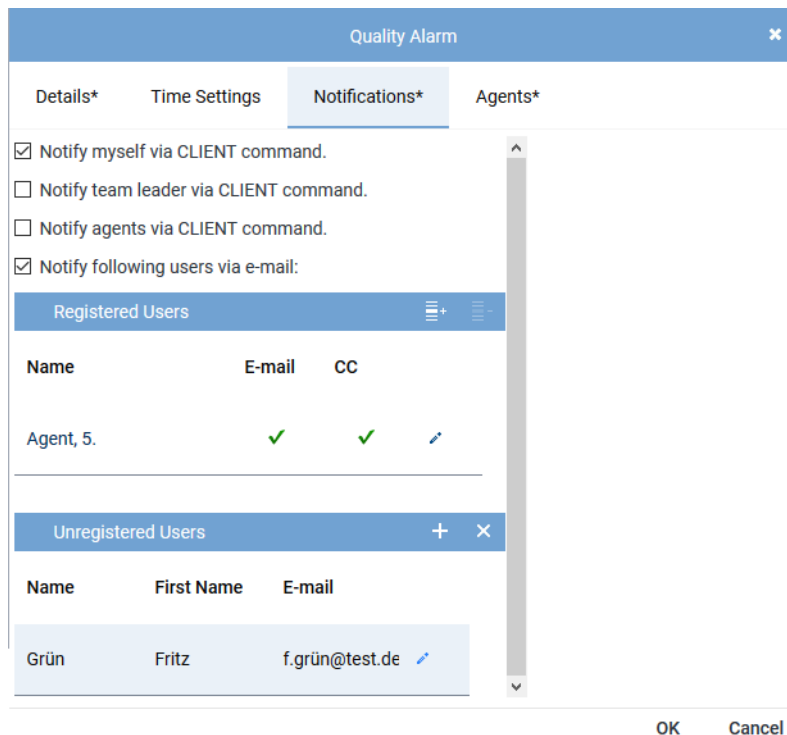


Fig. 33: Specific quality alarm - time settings

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

5.5.2.3 Tab Notifications

Here, you can select who is supposed to be notified when a quality alarm is issued. Notifications can go to agents, team supervisors, users, or the creator of the alarm.



Quality Alarm

Details* Time Settings Notifications* Agents*

☒ Notify myself via CLIENT command.

☐ Notify team leader via CLIENT command.

☐ Notify agents via CLIENT command.

☒ Notify following users via e-mail:

Registered Users

Name	E-mail	CC
Agent, 5.	✓	✓

Unregistered Users

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

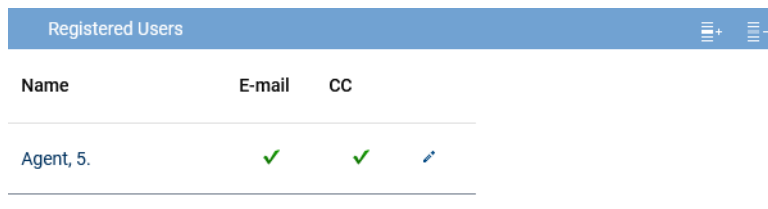
OK Cancel

Fig. 34: Specific quality alarm - notifications

- To notify the creator (yourself), supervisors or agents directly via CLIENT command, set a check mark in the respective check box ☒.
- To notify certain users, set the check mark in the check box *Notify following users via e-mail*.
 - ⇒ Additional fields are displayed where you can enter users and select the notification type. See [chapter "Assign registered users", p. 36](#) and [chapter "Assign unregistered users", p. 38](#).
The column *E-Mail* displays whether users are notified by e-mail or by means of CLIENT command:
 ✓ = notification option activated
 ✗ = notification option not activated

5.5.2.3.1 Assign registered users

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



Registered Users


Name	E-mail	CC
Agent, 5.	✓	✓

Fig. 35: Specific quality alarm - registered user (example)

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

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

Fig. 36: Specific quality alarm - select registered user (example)

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


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

Fig. 37: Specific quality alarm - edit registered user (example)

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






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

Fig. 38: Specific quality alarm - select notification type (example)

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

5.5.2.3.2 Remove registered users

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




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

Fig. 39: Specific quality alarm - remove registered user (example)

5.5.2.3.3 Assign unregistered users

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

Add Unregistered User



First name*
Last name*
E-mail*

Save
Cancel

Fig. 40: Specific quality alarm - add unregistered user

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

5.5.2.3.4 Edit unregistered users

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




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

Fig. 41: Specific quality alarm - unregistered user (example)



2. Make the required changes.

Unregistered Users




Name
First Name
E-mail

☐
☐

Fig. 42: Specific quality alarm - edit unregistered user (example)

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

5.5.2.3.5 Delete unregistered users

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


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

Fig. 43: Specific quality alarm - delete unregistered user (example)

5.5.2.4 Tab Agents

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









Quality Alarm	
Details*	Time Settings
Notifications*	Agents*
<div>    </div>	
Last Name ↕	First Name ↕
Agent	8.
Agent	7.
<div>OK Cancel</div>	

Fig. 44: Specific quality alarm - assign agents

	<i>Add from organization structure</i>	Opens a window in which you can select agents from the organization structure, see chapter "Add agents from organization structure", p. 39.
	<i>Add</i>	Opens a window in which you can select your own agents, see chapter "Add agents", p. 40.
	<i>Remove</i>	Removes the selected agents from the list.

5.5.2.4.1 Add agents from organization structure

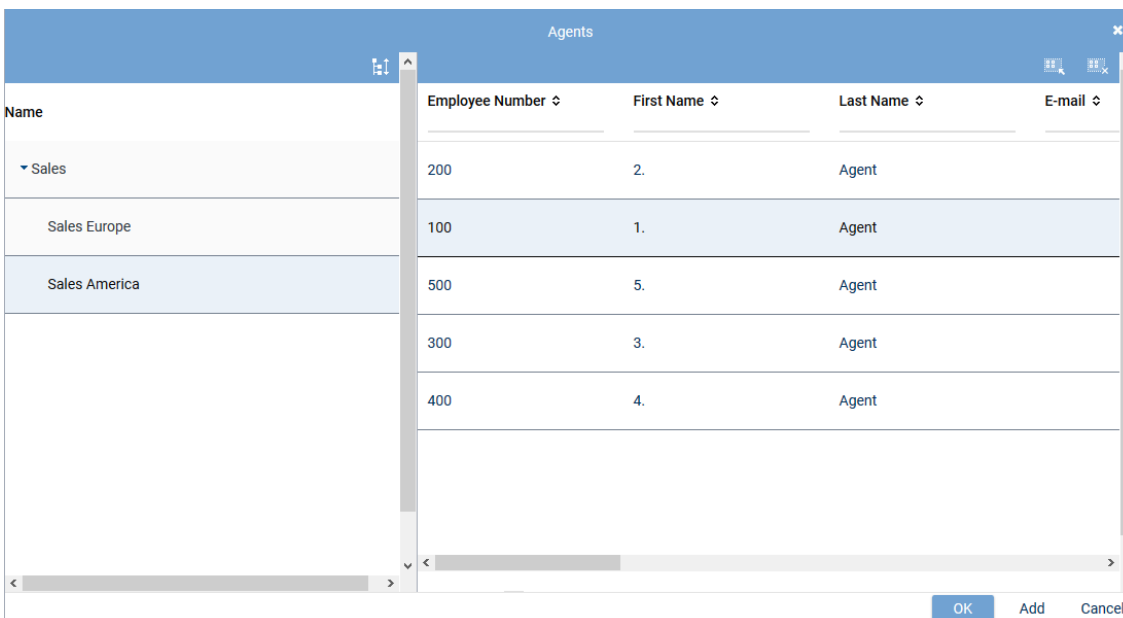
- Select the tab *Agents*, see [chapter "Tab Agents", p. 39.](#)
- To assign agents from the organization structure, click on the icon  (Add from organization structure).



Agents window showing search filters: Last Name, First Name. Below the filters, it states "No records found".

Fig. 45: Agents

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





Agents window showing a list of agents. The left pane shows the organization structure with "Sales" expanded, showing "Sales Europe" and "Sales America". The right pane shows a table of agents:

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

Buttons at the bottom: OK, Add, Cancel.

Fig. 46: Add agents from organization structure


- Select one or several agents from the list in the right window.
To select several agents or to revoke a selection, click on the respective line while holding the [Ctrl] key down.
To select all agents, click on the icon  (Select all).
To deselect all selected 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 selected agents and close the window, click on the button *OK*.
To discard the selection and close the window, click on the button *Cancel*.

5.5.2.4.2 Add agents

- Select the tab *Agents*, see [chapter "Tab Agents", p. 39](#).



You can only add agents to whose data you have access.

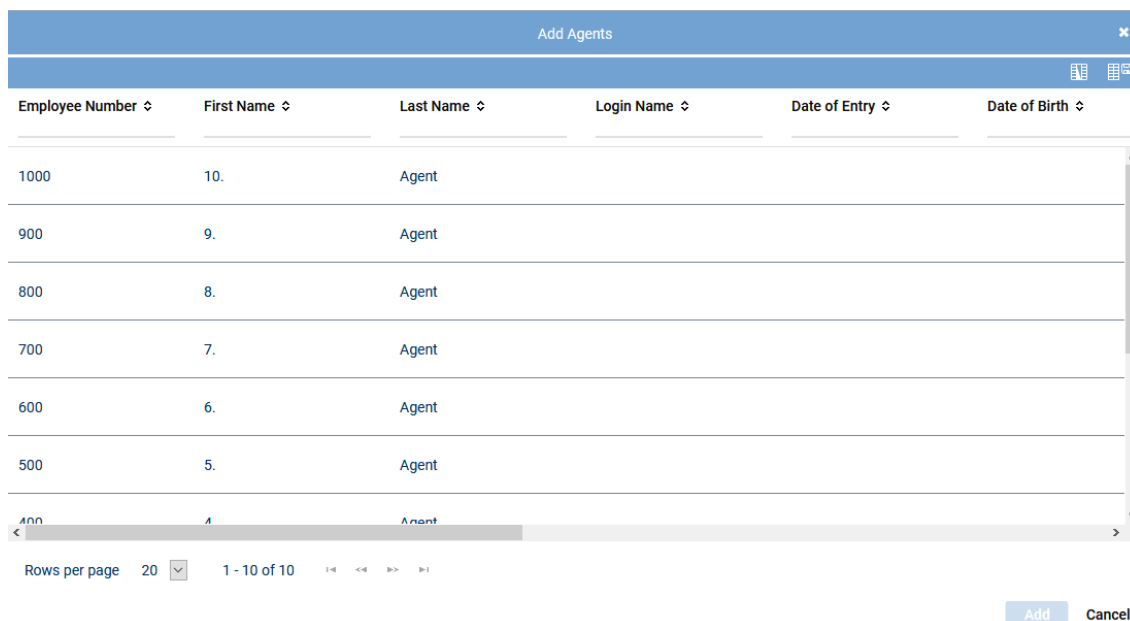
- To assign an agent, click on the icon  (*Add*).



Agents window showing search filters: Last Name, First Name. Below the filters, it states "No records found".

Fig. 47: Agents (example)

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



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


Rows per page: 20 1 - 10 of 10

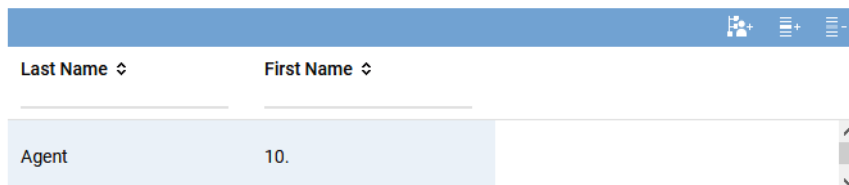
Add Cancel

Fig. 48: Add own agents

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

5.5.2.4.3 Remove agent assignment


- Select the tab *Agents*, see [chapter "Tab Agents", p. 39](#).
- To remove the assignment of an agent, select the respective agent in the list and click on the icon  (*Remove*).

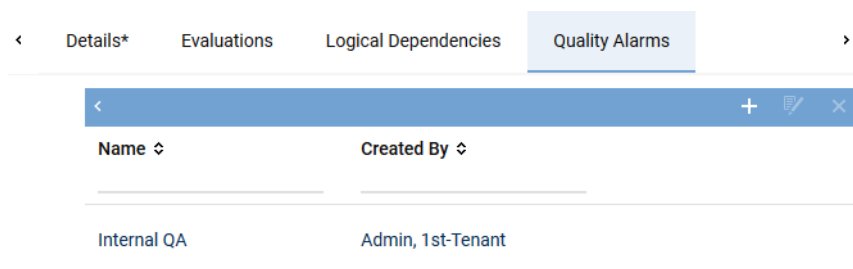


Last Name	First Name
Agent	10.

Fig. 49: Remove agent assignment

5.5.3 Delete specific quality alarm

- Select the tab *Quality Alarms* (see [chapter "Tab Quality Alarms", p. 20](#)).
- To delete a specific quality alarm, select the corresponding entry in the list and click on the icon  (*Delete*).



Name	Created By
Internal QA	Admin, 1st-Tenant

Fig. 50: Delete specific quality alarm

6 Training Package Templates module

6.1 General

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

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

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

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

Creating a training package template

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

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

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

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

Creating categories for training package templates

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



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



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









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

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

6.2 Main view

Click on the menu item *Templates* and the submenu item *Training Package Templates* in the navigation bar to open the table of the main view. In the main view, all saved training package templates are displayed.






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

Rows per page 50 1 - 3 of 3

Fig. 51: Training package templates - main view

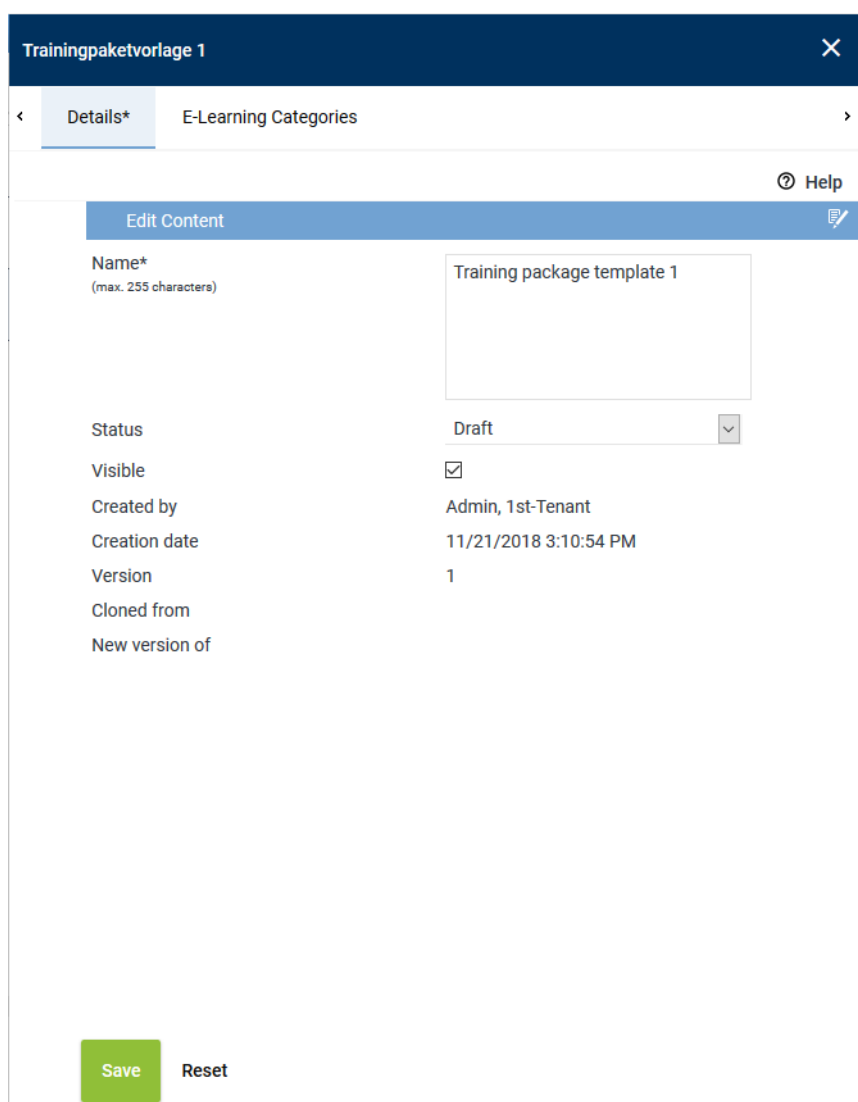
You can see your own training package templates and the globally available templates. To be able to see all templates, the particular access right *Can see all training package templates* is required.

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

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

6.3 Detail view

Click on an element in the table of the main view to display additional information about as well as functions of the selected template in the detail view.



Trainingpaketvorlage 1

< Details* E-Learning Categories >

Help

Edit Content

Name*
(max. 255 characters)

Training package template 1

Status

Draft

Visible

☒

Created by

Admin, 1st-Tenant

Creation date

11/21/2018 3:10:54 PM

Version

1

Cloned from

New version of

Save Reset

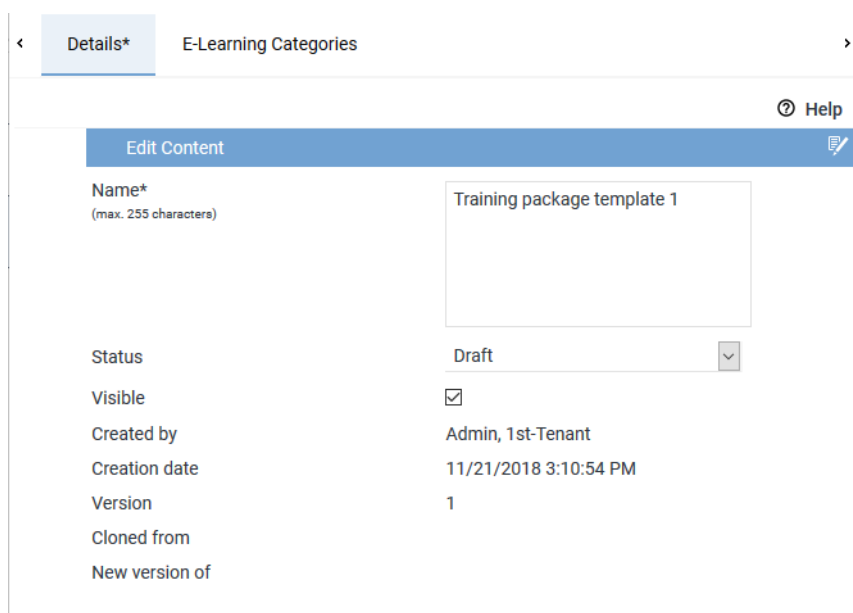
Fig. 52: Training package templates - detail view

The detail view consists of the following tabs:

- *Details*
Here, you can display and edit detailed information about the selected template.
See [chapter "Tab Details", p. 44](#).
- *E-Learning Categories*
Here, you can add or remove categories.
See [chapter "Tab E-Learning Categories", p. 45](#).

6.3.1 Tab Details

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



< Details* E-Learning Categories >

Help

Edit Content

Name*
(max. 255 characters)

Training package template 1

Status

Draft

Visible

☒

Created by

Admin, 1st-Tenant

Creation date

11/21/2018 3:10:54 PM

Version

1

Cloned from

New version of

Fig. 53: Details

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

6.3.2 Tab E-Learning Categories

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

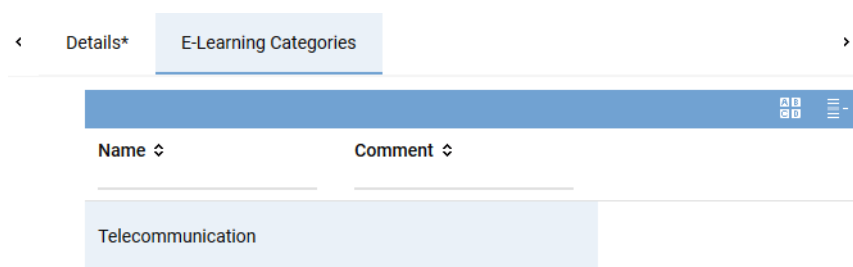








Fig. 54: Tab E-Learning Categories


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

See also

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

6.4

Create template

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

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

- The template generator opens.

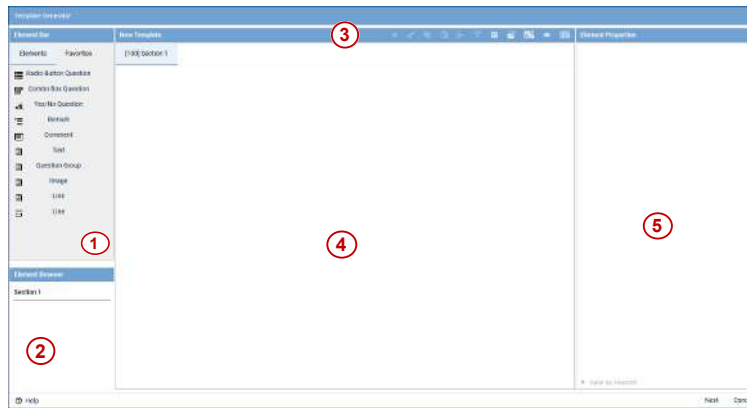


Fig. 55: Create template (example)

1	<p>Element bar</p> <p>This area on the left side of the window contains the elements which are used to create templates.</p> <p>See Element bar.</p>
2	<p>Element browser</p> <p>In this area, an overview of the template's sections as well as the elements they contain is displayed.</p> <p>See Element browser and Add new section.</p>
3	<p>Toolbar</p> <p>This area contains the available control functions.</p> <p>See Toolbar of the template generator.</p>
4	<p>Working area</p> <p>Here, you arrange the elements.</p>
5	<p>Element properties</p> <p>In this area, you define the details of the selected elements.</p> <p>See Element properties.</p>

4. Set up the template according to your requirements.



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

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

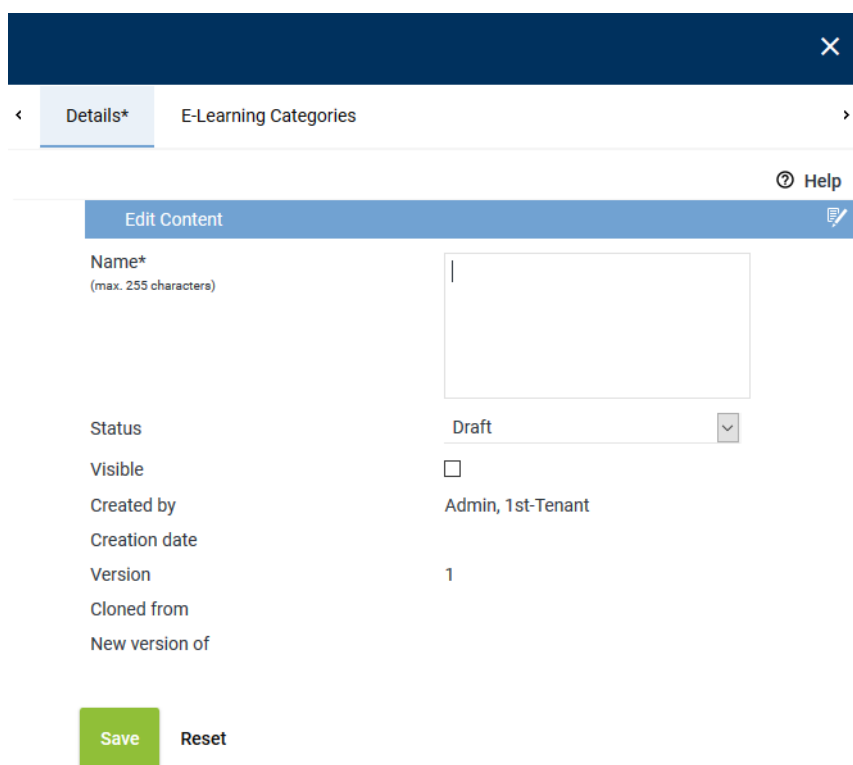



Fig. 56: Create template - detail view (example)

7. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 44.
 - *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 45.
8. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button **Cancel**.

6.5 Edit template

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



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

3. Set up the template according to your requirements.



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

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

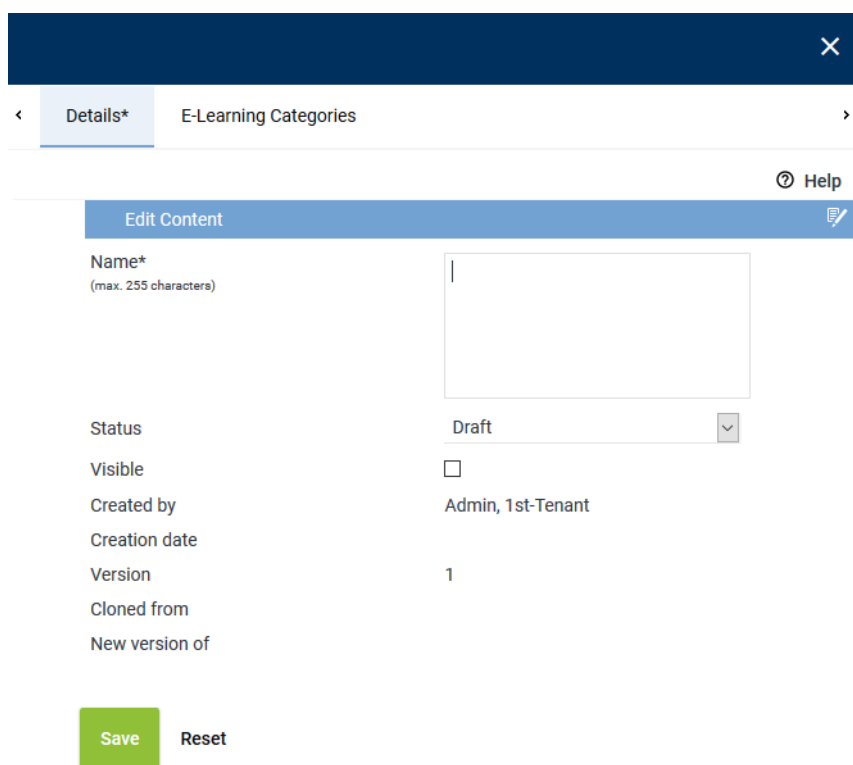



Fig. 57: Create template - detail view (example)

6. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 44.
 - *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 45.
7. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button **Cancel**.

6.5.1 Assign existing category

1. Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 45.
2. Click on the icon  (*Administrate categories*).

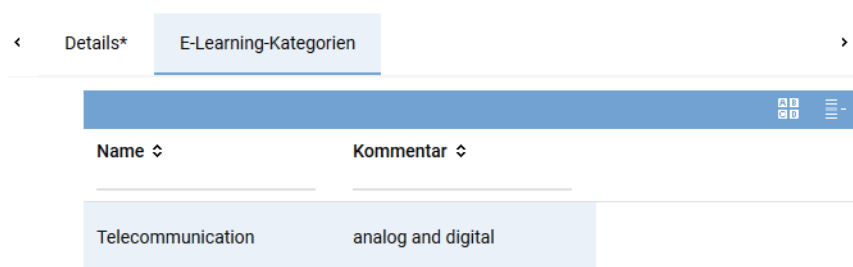
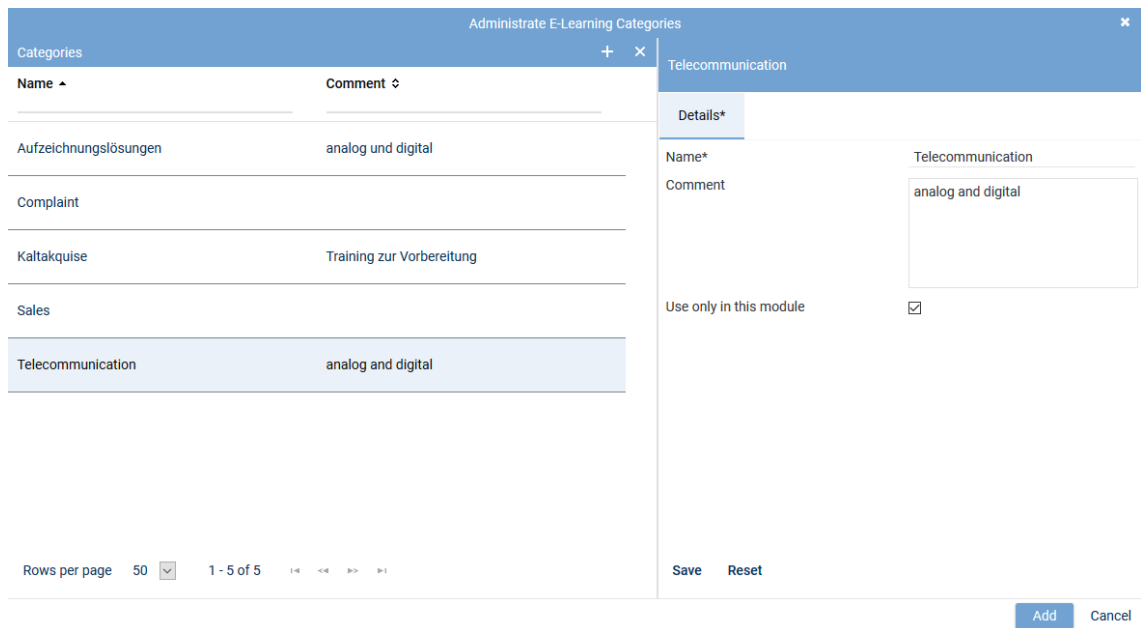


Fig. 58: Add existing category

3. Select a category from the list.



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

Rows per page: 50 | 1 - 5 of 5 | < << >> >


Save Reset

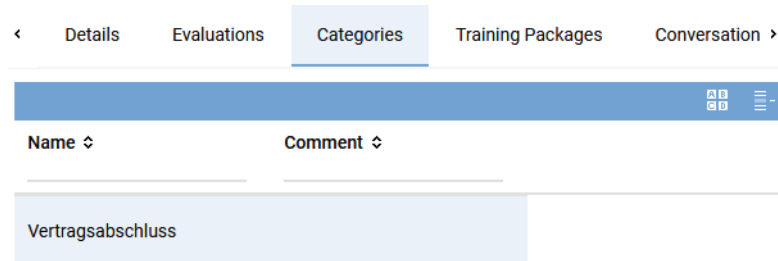
Add Cancel

Fig. 59: Add category

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

6.5.2 Remove category assignment

- Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 45.
- To remove the assignment of a category, select the respective category in the list and click on the icon  (*Remove*).




< Details Evaluations **Categories** Training Packages Conversation >

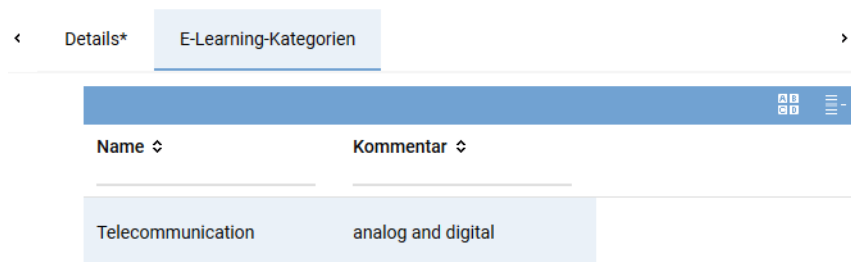
Name Comment

Vertragsabschluss

Fig. 60: Remove category assignment (example)

6.5.3 Create and add new category

- Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 45.
- Click on the icon  (*Administrate categories*).



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

Name Kommentar

Telecommunication analog and digital

Fig. 61: Create new category

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

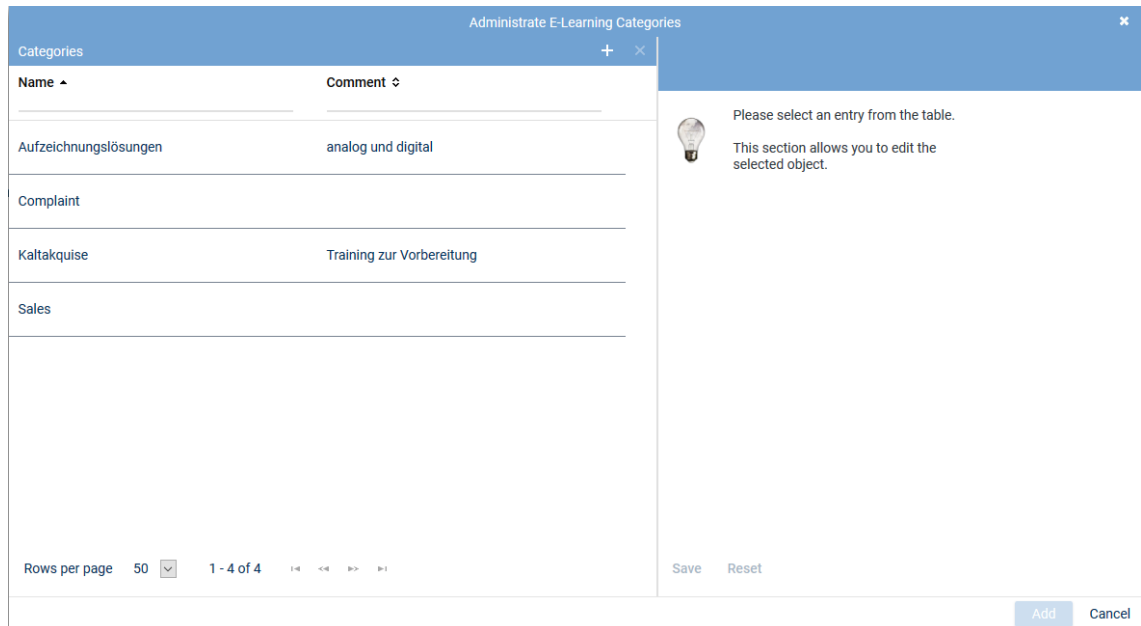


Fig. 62: Create new category

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

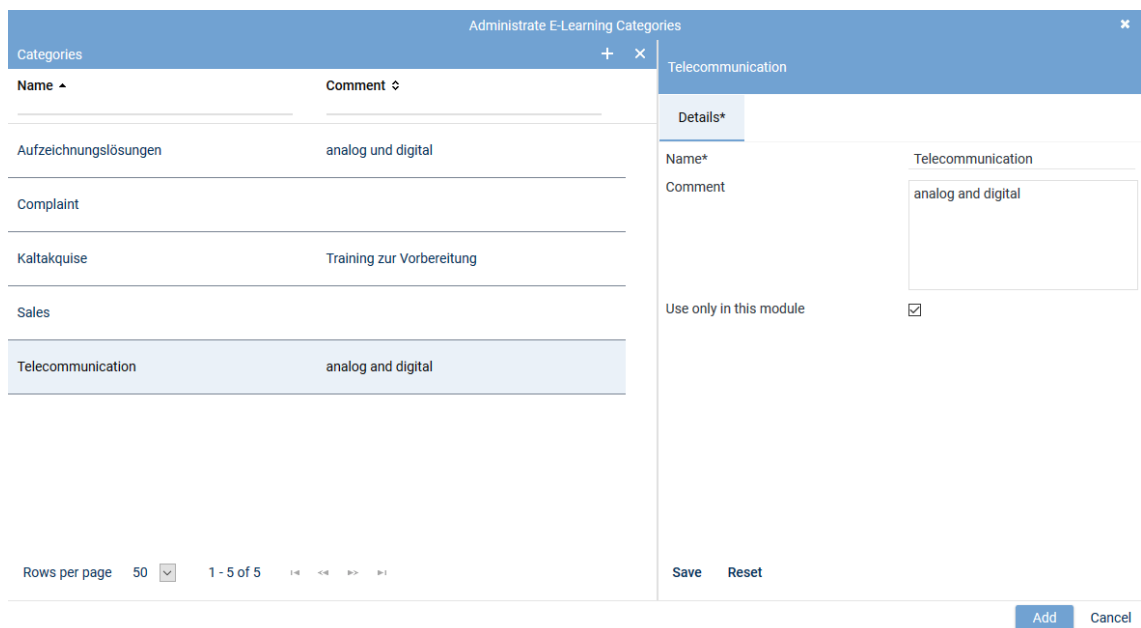


Fig. 63: Create new category

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

6.5.4 Delete category

- Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 45.

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

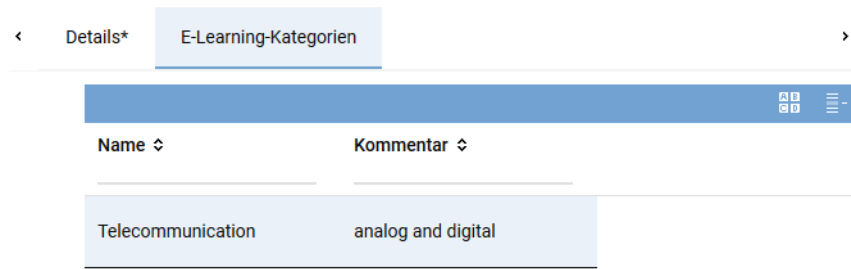


Fig. 64: Delete category

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

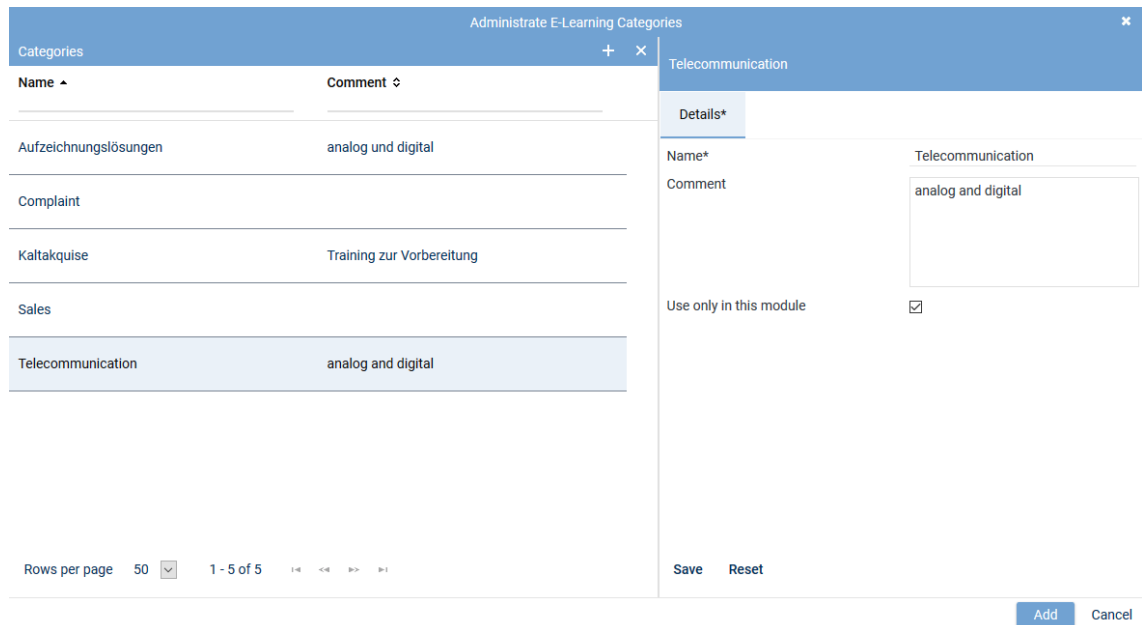



Fig. 65: Delete category

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



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

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

See also

 Tab E-Learning Categories [► 45]

7

Quiz Templates module

7.1

General

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

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

Creating a quiz template

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

Creating categories for quiz templates

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









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

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

7.2

Main view



Click on the menu item *Templates* and the submenu item *Quiz Templates* in the navigation bar to open the table of the main view. In the main view, all saved quiz templates are displayed.




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

Rows per page 50 1 - 3 of 3

Fig. 66: Quiz templates - main view

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

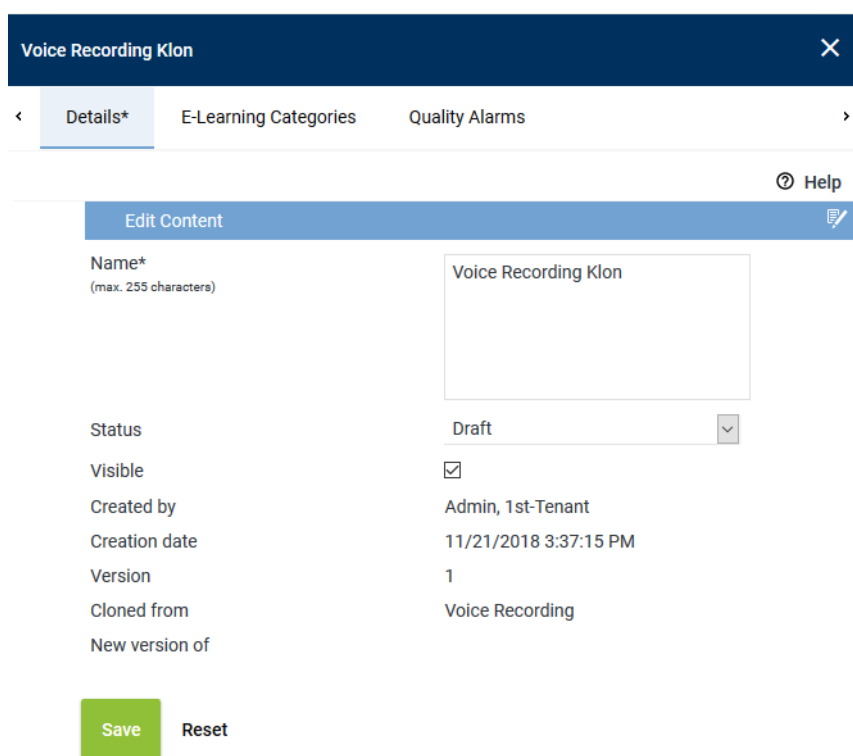
Name	Name of the template
Created By	Name of the user who has created the template.
Visible	Shows whether the template is visible for other users.  = Template is visible.  = Template is invisible.
Version	Version number of the template

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

7.3

Detail view

Click on an element in the table of the main view to display additional information about as well as functions of the selected template in the detail view.



Voice Recording Klon [X]

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

[?] Help

Edit Content [Pencil]

Name*
(max. 255 characters)

Voice Recording Klon

Status: Draft [v]

Visible: ☒

Created by: Admin, 1st-Tenant

Creation date: 11/21/2018 3:37:15 PM

Version: 1

Cloned from: Voice Recording

New version of:

Save **Reset**

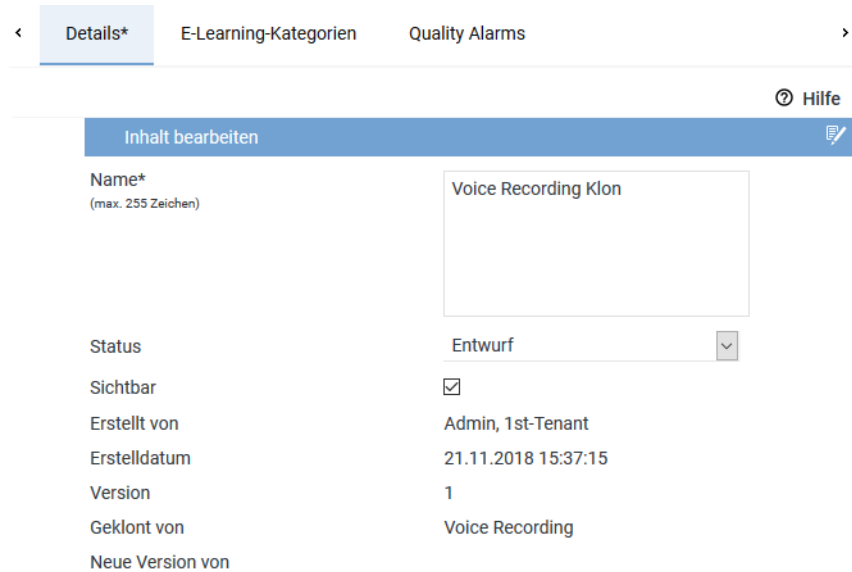
Fig. 67: Quiz templates - detail view

The detail view consists of the following tabs:

- **Details**
Here, you can display and edit detailed information about the selected template.
See [chapter "Tab Details", p. 55](#).
- **E-Learning Categories**
Here, you can add or remove categories.
See [chapter "Tab E-Learning Categories", p. 55](#).
- **Quality Alarms**
Here, you can display and edit threshold values (quality alarms) for the quiz results.
See [chapter "Tab Quality Alarms", p. 20](#)

7.3.1 Tab Details

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



< Details* E-Learning-Kategorien Quality Alarms >

Hilfe

Inhalt bearbeiten

Name*
(max. 255 Zeichen)

Voice Recording Klon

Status Entwurf

Sichtbar ☒

Erstellt von Admin, 1st-Tenant

Erstelldatum 21.11.2018 15:37:15

Version 1

Geklont von Voice Recording

Neue Version von

Fig. 68: Details

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

7.3.2 Tab E-Learning Categories

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

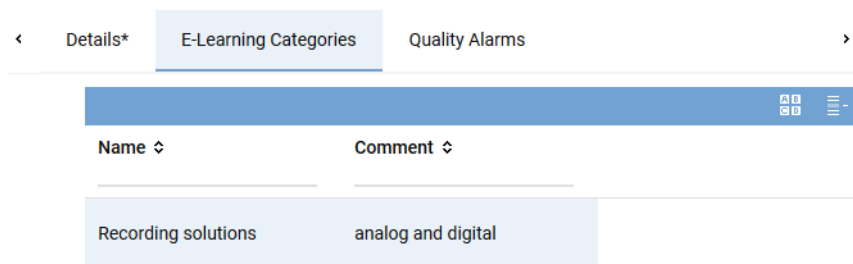




Fig. 69: Tab E-Learning Categories

	<p>Administrate categories</p> <p>Opens a window in which you can create new categories and select or delete already existing categories.</p> <p>See</p> <ul style="list-style-type: none"> chapter "Create and add new category", p. 61 chapter "Assign existing category", p. 60 chapter "Delete category", p. 62
	<p>Remove</p> <p>Removes the assignment of the selected category.</p> <p>See chapter "Remove category assignment", p. 61.</p>

See also

- Assign existing category [▶ 60]
- Remove category assignment [▶ 61]
- Create and add new category [▶ 61]
- Delete category [▶ 62]

7.3.3 Tab Quality Alarms

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

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

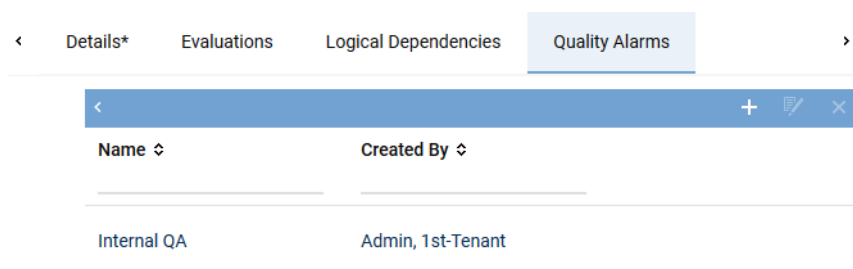






Fig. 70: Quality alarms (reduced view)

	<i>Create specific quality alarm</i>	Creates a new quality alarm, see chapter "Edit or create specific quality alarm" , p. 63.
	<i>Edit specific quality alarm</i>	Opens the selected quality alarm for editing, see chapter "Edit or create specific quality alarm" , p. 63.
	<i>Delete</i>	Deletes the selected quality alarm, see chapter "Delete specific quality alarm" , p. 72.

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













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

Fig. 71: Quality alarms (expanded view)

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

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

7.4 Create template

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

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

This option is only visible if templates already exist.

3. The template generator opens:

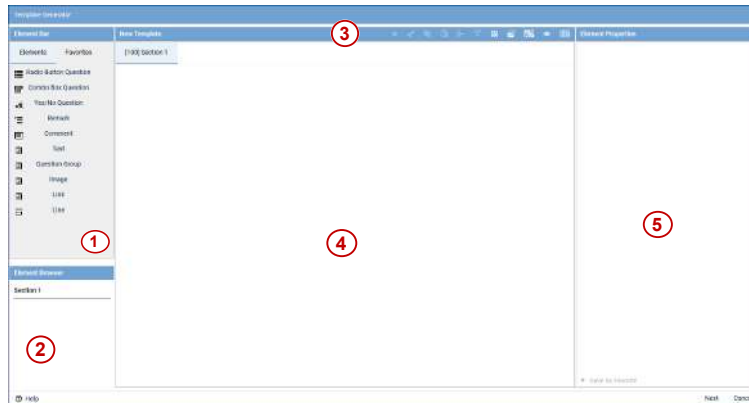


Fig. 72: Create template (example)

1	<p>Element bar</p> <p>This area on the left side of the window contains the elements which are used to create templates.</p> <p>See Element bar.</p>
2	<p>Element browser</p> <p>In this area, an overview of the template's sections as well as the elements they contain is displayed.</p> <p>See Element browser and Add new section.</p>
3	<p>Toolbar</p> <p>This area contains the available control functions.</p> <p>See Toolbar of the template generator.</p>
4	<p>Working area</p> <p>Here, you arrange the elements.</p>
5	<p>Element properties</p> <p>In this area, you define the details of the selected elements.</p> <p>See Element properties.</p>

4. Set up the template according to your requirements.



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

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

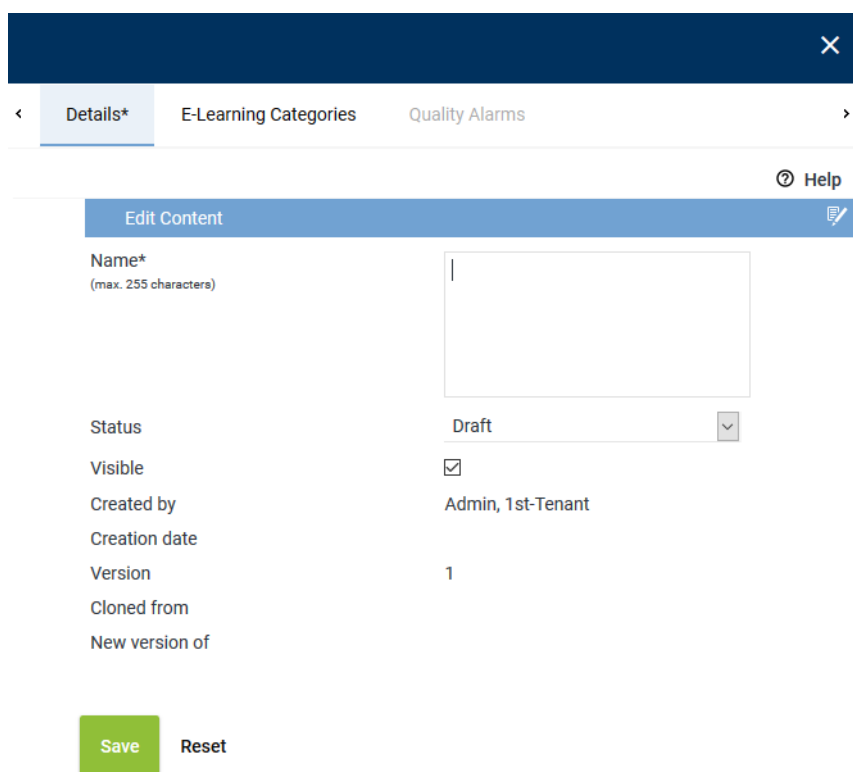



Fig. 73: Create template - detail view (example)

7. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details", p. 55](#).
 - *E-Learning Categories*, see [chapter "Tab E-Learning Categories", p. 55](#).
 - *Quality Alarms*, see [chapter "Tab Quality Alarms", p. 20](#).
8. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button **Cancel**.

7.5

Edit template

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



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

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:

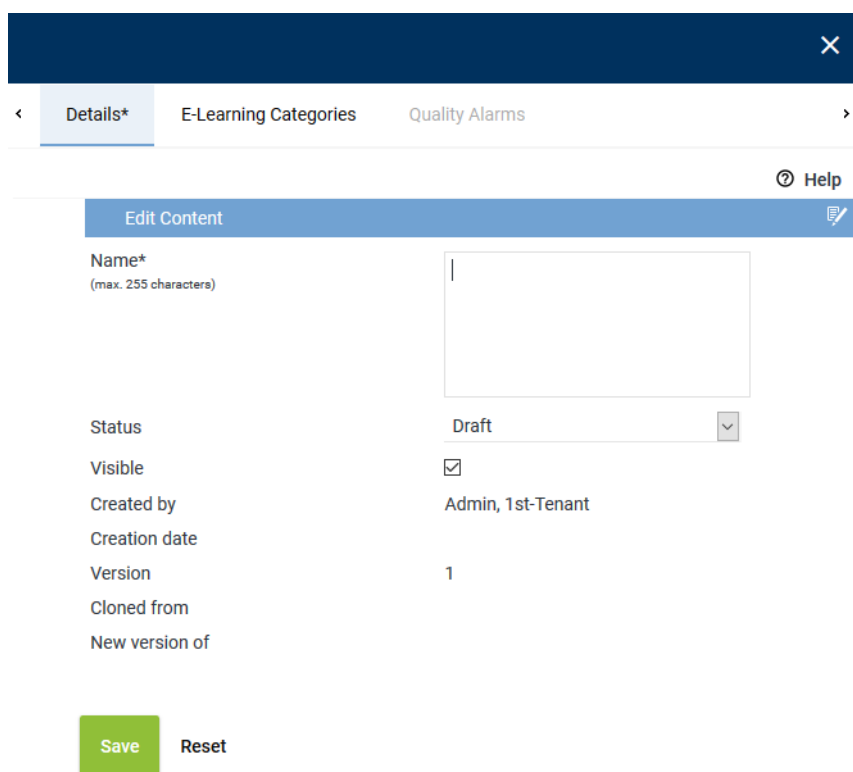

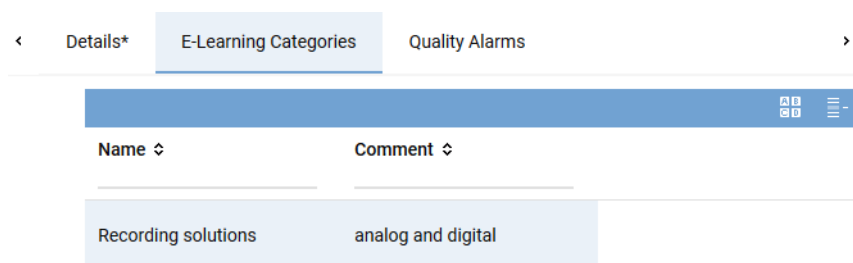


Fig. 74: Create template - detail view (example)

6. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 55.
 - *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 55.
 - *Quality Alarms*, see [chapter "Tab Quality Alarms"](#), p. 20.
7. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button *Cancel*.

7.5.1 Assign existing category

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



Name ↕	Comment ↕
Recording solutions	analog and digital

Fig. 75: Add existing category

3. Select a category from the list.

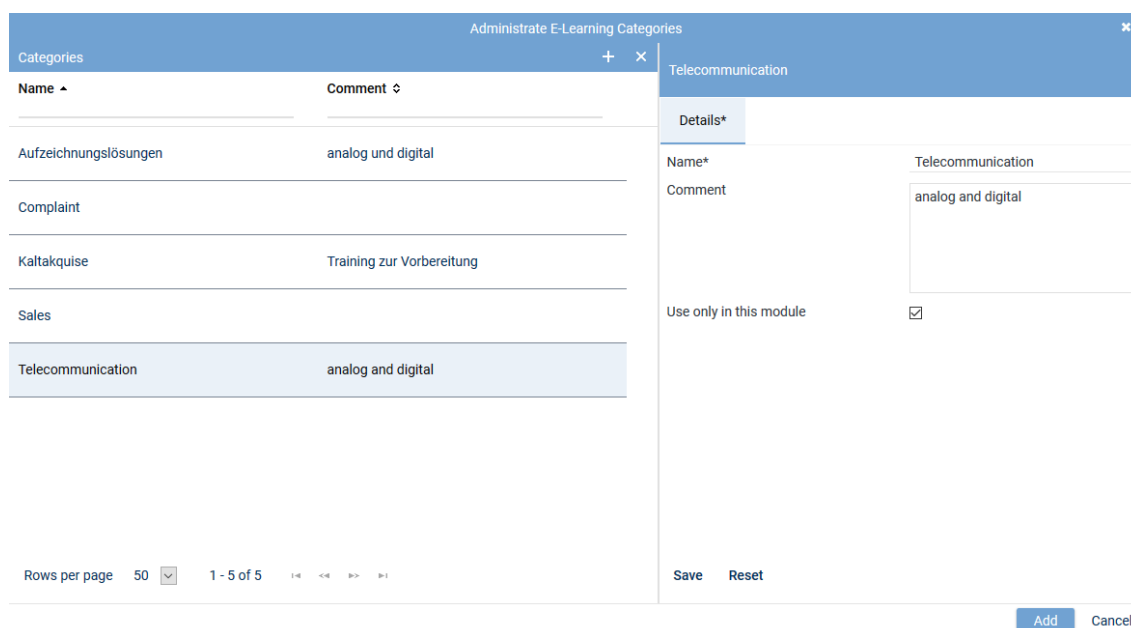



Fig. 76: Add category

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

7.5.2 Remove category assignment

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

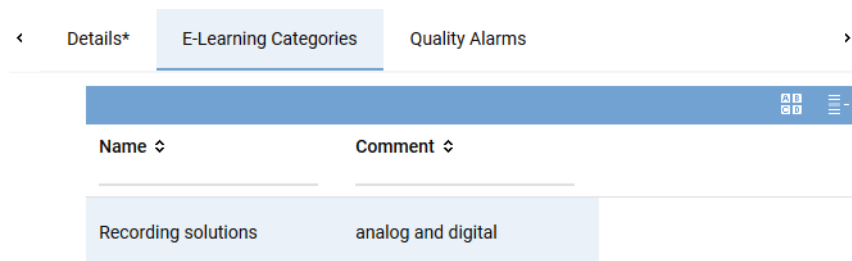



Fig. 77: Remove category assignment (example)

7.5.3 Create and add new category

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

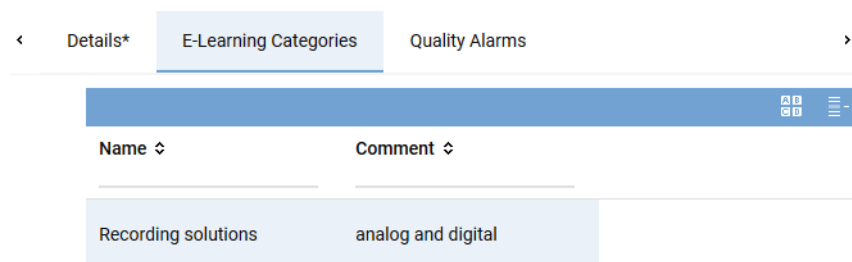
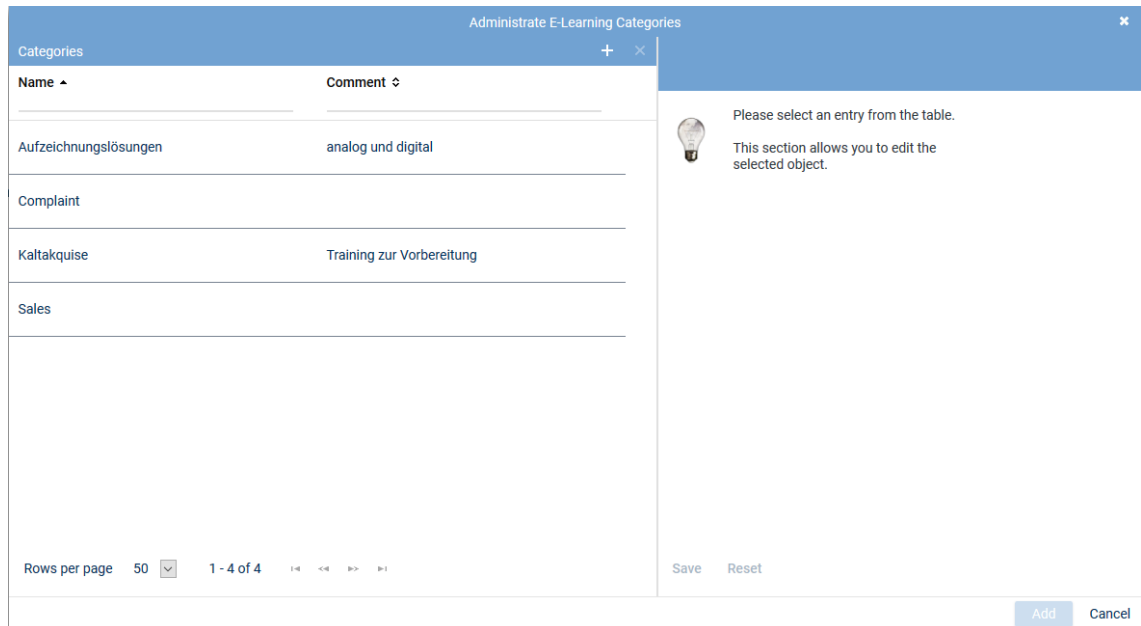


Fig. 78: Create new category

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



Administrate E-Learning Categories

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

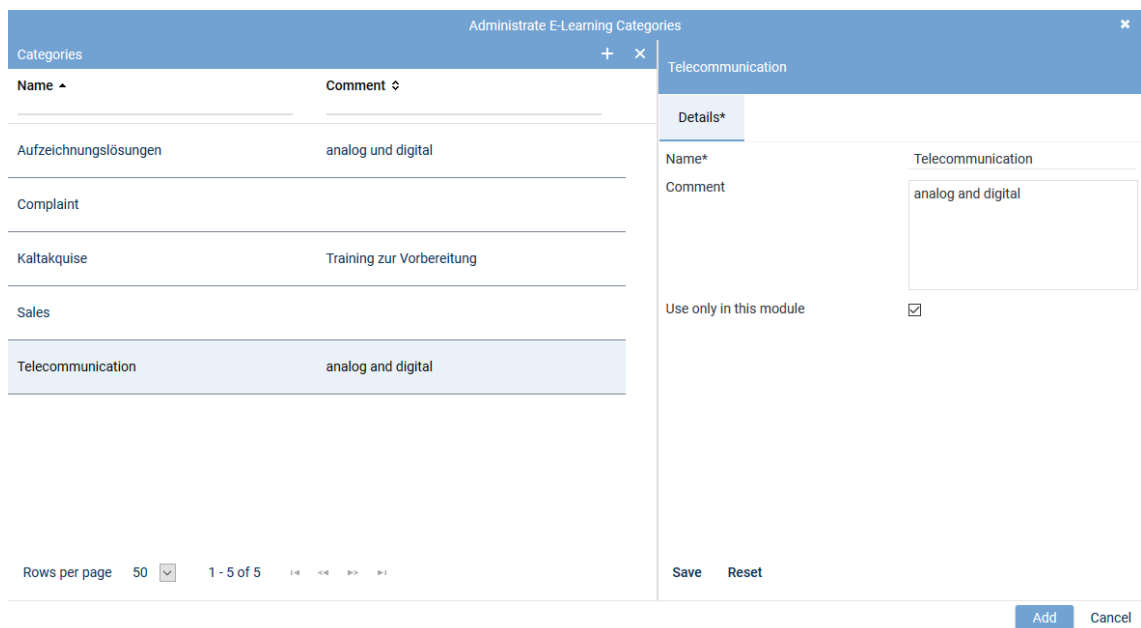
Rows per page: 50 | 1 - 4 of 4 | << < > >> | Save Reset

Please select an entry from the table.
This section allows you to edit the selected object.

Add Cancel

Fig. 79: Create new category

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



Administrate E-Learning Categories

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

Rows per page: 50 | 1 - 5 of 5 | << < > >> | Save Reset

Telecommunication

Details*

Name* Telecommunication

Comment analog and digital

Use only in this module ☒

Save Reset

Add Cancel

Fig. 80: Create new category

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

7.5.4 Delete category

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

- Click on the icon  (*Administrare categories*).

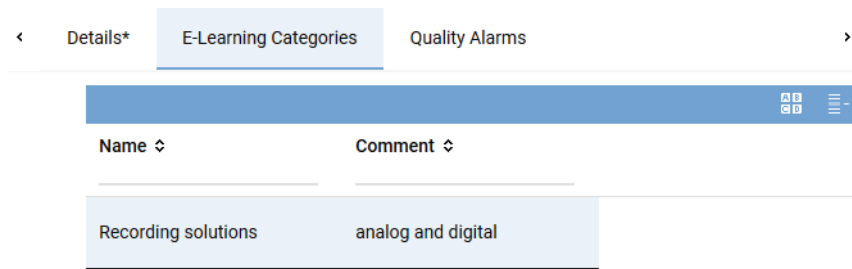


Fig. 81: Delete category

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

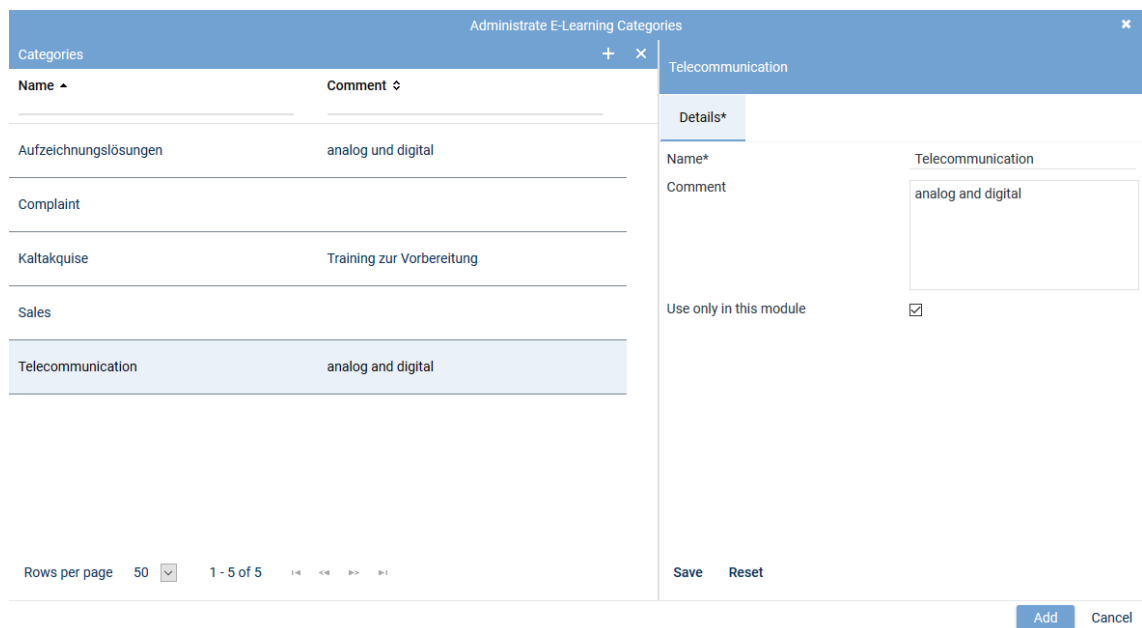



Fig. 82: Delete category

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



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



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

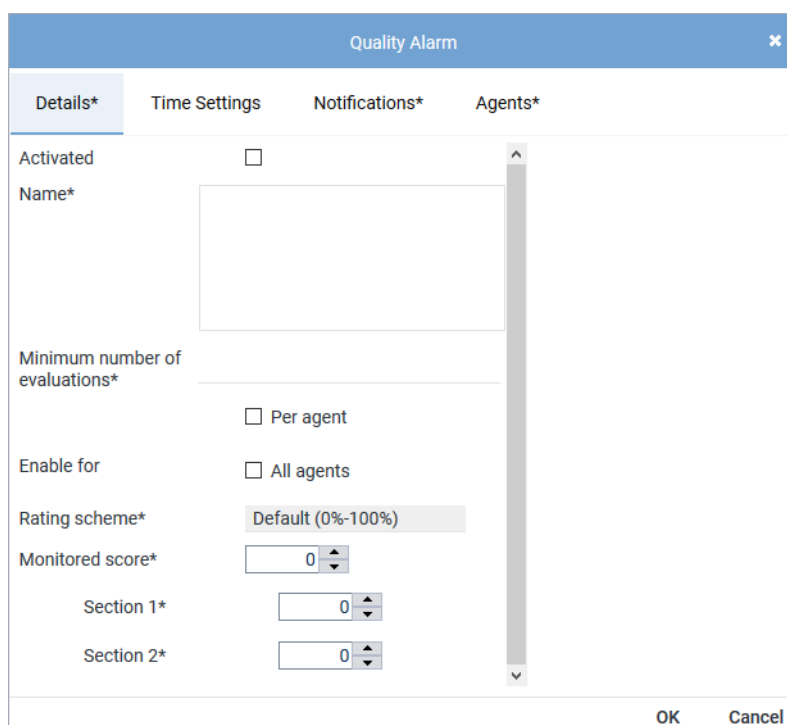
See also

 Tab E-Learning Categories [► 55]

7.5.5

Edit or create specific quality alarm

- Select the tab *Quality Alarms*, see [chapter "Tab Quality Alarms", p. 20](#).
- To define a new specific quality alarm, click on the icon  (*Create*).
To edit an existing specific quality alarm, select the specific quality alarm in the list and click on  (*Edit specific quality alarm*).
⇒ The following window appears:



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

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

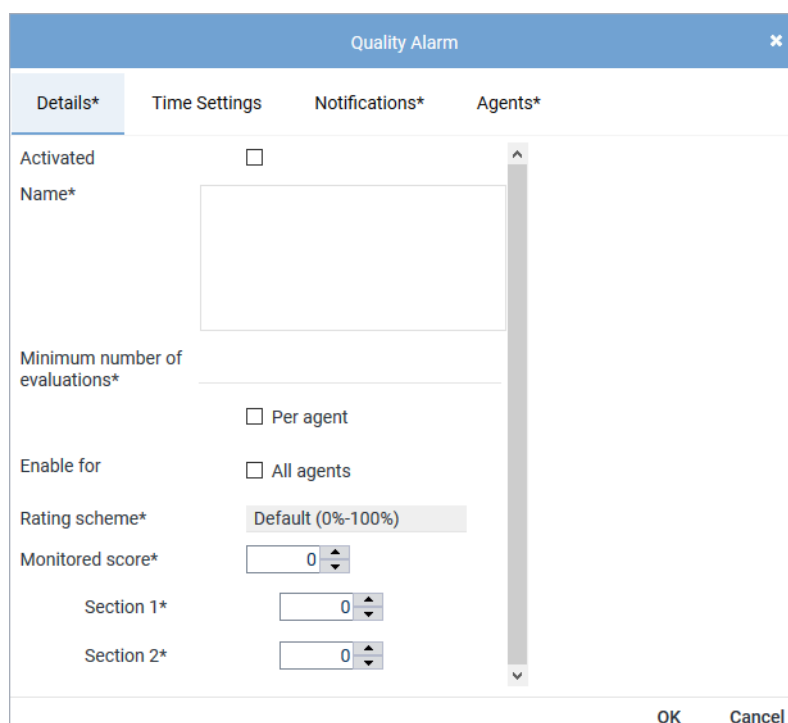
At the bottom right of the window are 'OK' and 'Cancel' buttons.

Fig. 83: Create or edit specific quality alarm

3. Adjust all necessary settings within the 4 tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 64
 - *Time Settings*, see [chapter "Tab Time Settings"](#), p. 66
 - *Notifications*, see [chapter "Tab Notifications"](#), p. 66
 - *Agents*, see [chapter "Tab Agents"](#), p. 70.
4. To save the settings, click on the button *OK*.
To discard the settings or the changes and close the window, click on the button *Cancel*.

7.5.5.1 Tab Details

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



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

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

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

Fig. 84: Specific quality alarm - define details

Activated	Shows whether the quality alarm has been activated. Select whether the quality alarm is supposed to be activated. <input checked="" type="checkbox"/> = Quality alarm has been activated. <input type="checkbox"/> = Quality alarm has been deactivated.
Name	Name of the quality alarm. Enter the name of the quality alarm here.
Minimum Number of Evaluations	Shows how many evaluations have to be made at least before the quality alarm is analyzed. Enter the number of the necessary evaluations.
Per Agent	Shows whether the quality alarm is supposed to be applied to individual agents. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to individual agents. <input type="checkbox"/> = Apply to all selected agents.
All Agents	Here, you can define whether the quality alarm is supposed to be applied to all agents known to the system. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to all agents. <input type="checkbox"/> = Apply only to the assigned agents. (Assign agents see chapter "Tab Agents", p. 70)
Rating Scheme	Shows which rating scheme is used. (The displayed value cannot be changed.)
Monitored Score	Shows the total score which is monitored as threshold value. Enter a score for the threshold value.
Section 1	If sections have been created in the template, then the sections' score is displayed here which is monitored as threshold value. Enter a score for the threshold value.

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

7.5.5.2 Tab Time Settings

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

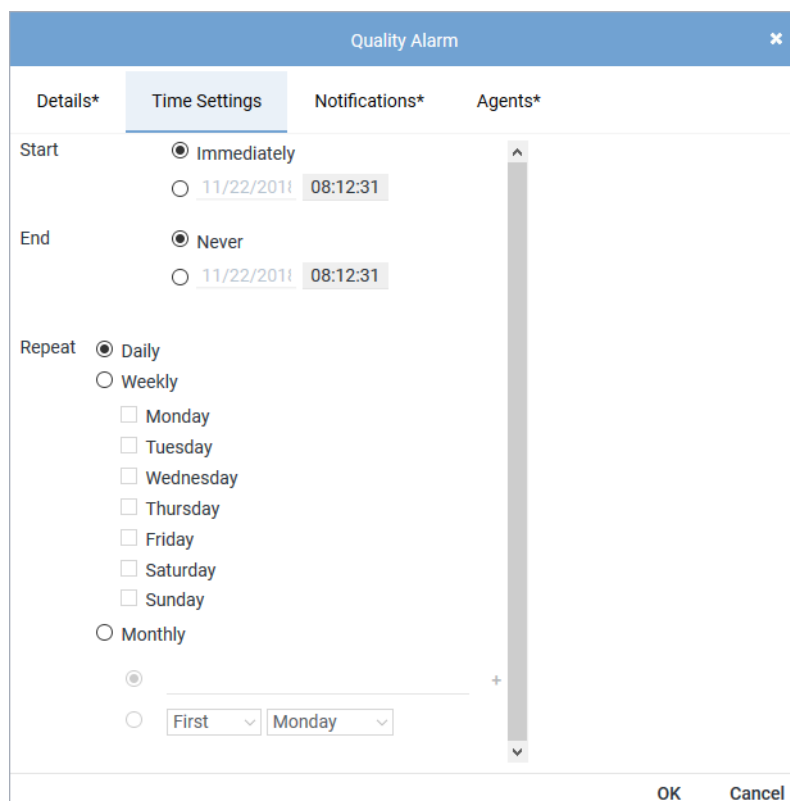
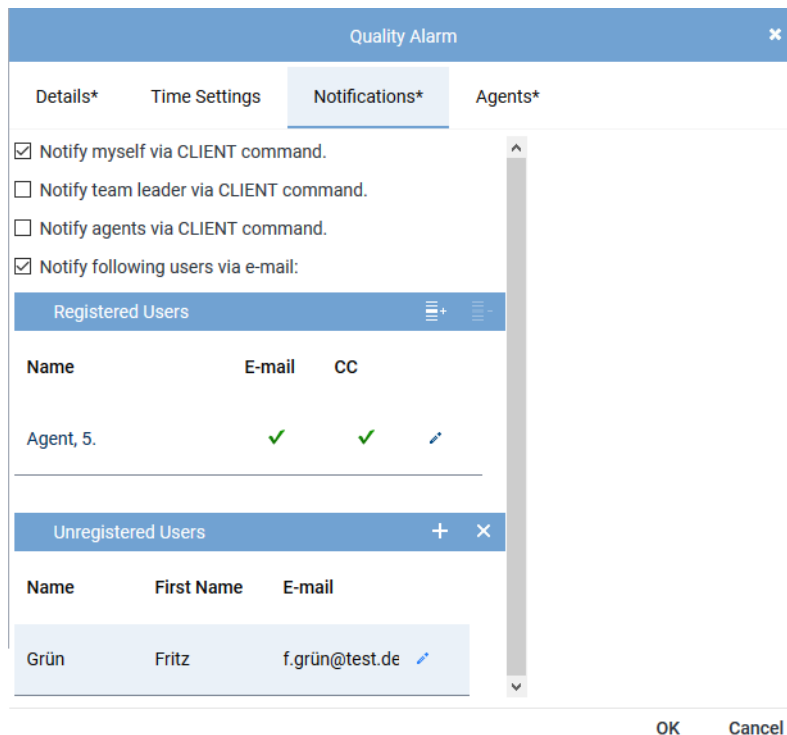


Fig. 85: Specific quality alarm - time settings

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

7.5.5.3 Tab Notifications

Here, you can select who is supposed to be notified when a quality alarm is issued. Notifications can go to agents, team supervisors, users, or the creator of the alarm.



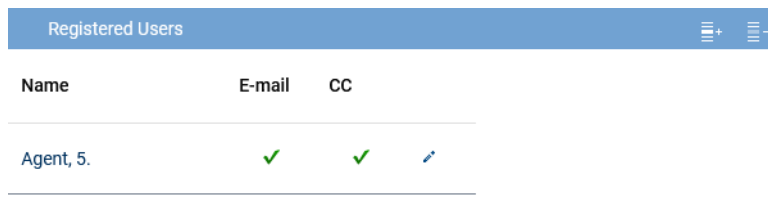
The dialog box 'Quality Alarm' has four tabs: Details*, Time Settings, Notifications* (selected), and Agents*. Under the Notifications* tab, there are four checkboxes: 'Notify myself via CLIENT command.' (checked), 'Notify team leader via CLIENT command.' (unchecked), 'Notify agents via CLIENT command.'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

Fig. 86: Specific quality alarm - notifications

1. To notify the creator (yourself), supervisors or agents directly via CLIENT command, set a check mark in the respective check box ☒.
2. To notify certain users, set the check mark in the check box *Notify following users via e-mail*.
 - ⇒ Additional fields are displayed where you can enter users and select the notification type. See [chapter "Assign registered users", p. 67](#) and [chapter "Assign unregistered users", p. 69](#).
The column *E-Mail* displays whether users are notified by e-mail or by means of CLIENT command:
 ✓ = notification option activated
 ✗ = notification option not activated

7.5.5.3.1 Assign registered users

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




The 'Registered Users' section shows a table with columns 'Name', 'E-mail', and 'CC'. It contains one row: 'Agent, 5.' with green checkmarks in the 'E-mail' and 'CC' columns and an edit icon.

Fig. 87: Specific quality alarm - registered user (example)

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

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

Fig. 88: Specific quality alarm - select registered user (example)

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




Registered Users		
Name	E-mail	CC
Agent, 5.		 

Fig. 89: Specific quality alarm - edit registered user (example)

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






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

Fig. 90: Specific quality alarm - select notification type (example)

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


7.5.5.3.2 Remove registered users

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

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

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

7.5.5.3.3 Assign unregistered users

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

Add Unregistered User


First name*
Last name*
E-mail*

Save Cancel

Fig. 92: Specific quality alarm - add unregistered user

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

7.5.5.3.4 Edit unregistered users

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



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

Fig. 93: Specific quality alarm - unregistered user (example)


2. Make the required changes.

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

Fig. 94: Specific quality alarm - edit unregistered user (example)

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

7.5.5.3.5 Delete unregistered users

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


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

Fig. 95: Specific quality alarm - delete unregistered user (example)

7.5.5.4 Tab Agents

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









Quality Alarm	
Details*	Time Settings
Notifications*	Agents*
<div>    </div>	
Last Name ↕	First Name ↕
Agent	8.
Agent	7.
<div>OK Cancel</div>	

Fig. 96: Specific quality alarm - assign agents

	<i>Add from organization structure</i>	Opens a window in which you can select agents from the organization structure, see chapter "Add agents from organization structure", p. 70 .
	<i>Add</i>	Opens a window in which you can select your own agents, see chapter "Add agents", p. 71 .
	<i>Remove</i>	Removes the selected agents from the list.

7.5.5.4.1 Add agents from organization structure

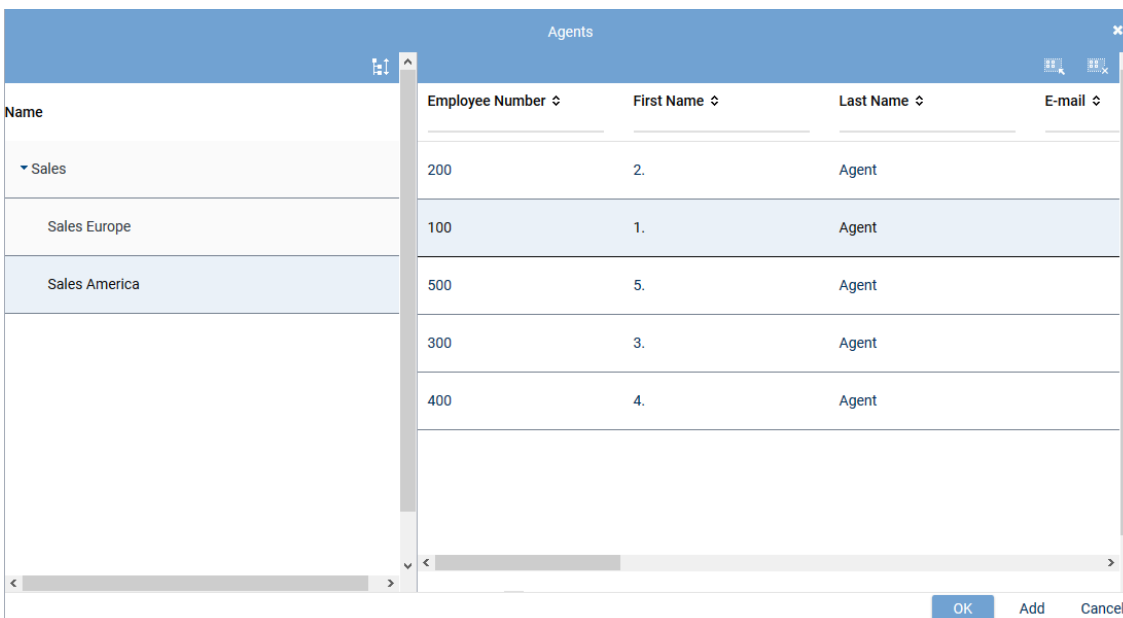
- Select the tab *Agents*, see [chapter "Tab Agents", p. 70](#).
- To assign agents from the organization structure, click on the icon  (Add from organization structure).



Agents window showing search filters: Last Name, First Name. Below the filters, it states "No records found".

Fig. 97: Agents

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





Agents window showing a list of agents. The left pane shows the organization structure with "Sales" expanded, showing "Sales Europe" and "Sales America". The right pane shows a table of agents:

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

Buttons at the bottom: OK, Add, Cancel.

Fig. 98: Add agents from organization structure


- Select one or several agents from the list in the right window.
To select several agents or to revoke a selection, click on the respective line while holding the [Ctrl] key down.
To select all agents, click on the icon  (Select all).
To deselect all selected 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 selected agents and close the window, click on the button *OK*.
To discard the selection and close the window, click on the button *Cancel*.

7.5.5.4.2 Add agents

- Select the tab *Agents*, see [chapter "Tab Agents", p. 70](#).



You can only add agents to whose data you have access.

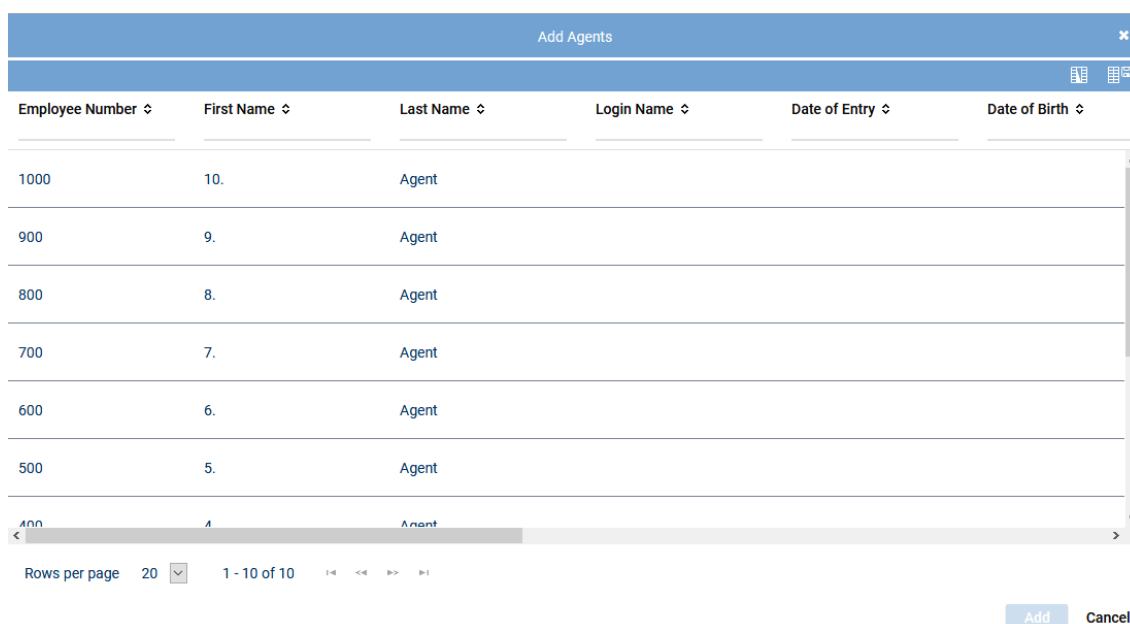
- To assign an agent, click on the icon  (*Add*).



Agents window showing search filters: Last Name, First Name. Below the filters, it states "No records found".

Fig. 99: Agents (example)

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




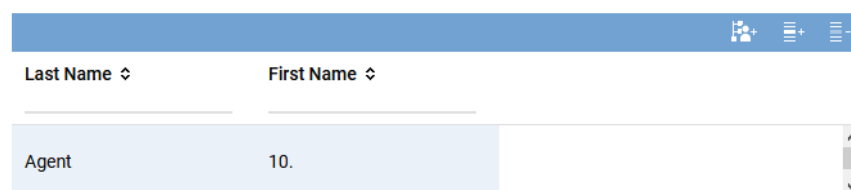
Employee Number	First Name	Last Name	Login Name	Date of Entry	Date of Birth
1000	10.	Agent			
900	9.	Agent			
800	8.	Agent			
700	7.	Agent			
600	6.	Agent			
500	5.	Agent			
400	4.	Agent			
300	3.	Agent			
200	2.	Agent			
100	1.	Agent			

Fig. 100: Add own agents

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

7.5.5.4.3 Remove agent assignment


- Select the tab *Agents*, see [chapter "Tab Agents", p. 70](#).
- To remove the assignment of an agent, select the respective agent in the list and click on the icon  (*Remove*).

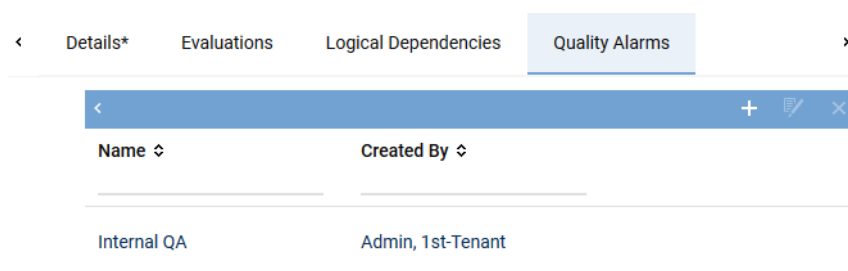


Last Name	First Name
Agent	10.

Fig. 101: Remove agent assignment

7.5.6 Delete specific quality alarm

- Select the tab *Quality Alarms*, see [chapter "Tab Quality Alarms", p. 20](#).
- To delete a specific quality alarm, select the corresponding entry in the list and click on the icon  (*Delete*).



Name	Created By
Internal QA	Admin, 1st-Tenant

Fig. 102: Delete specific quality alarm

List of figures

Fig. 1	Menu item Templates	6
Fig. 2	Toolbar of the main view (example).....	8
Fig. 3	Preview	9
Fig. 4	Preview result	9
Fig. 5	Load summary (example).....	10
Fig. 6	Window Search Criteria (example).....	10
Fig. 7	Evaluation templates - main view (example)	13
Fig. 8	Evaluation templates - detail view	14
Fig. 9	Details (example).....	15
Fig. 10	Evaluations (reduced view).....	17
Fig. 11	Evaluations (expanded view).....	17
Fig. 12	Menu items View	18
Fig. 13	Evaluation (example).....	19
Fig. 14	Logical Dependencies	19
Fig. 15	Logical dependencies, information	20
Fig. 16	Quality alarms (reduced view)	20
Fig. 17	Quality alarms (expanded view)	20
Fig. 18	Header (example).....	21
Fig. 19	Group field Header Elements (example)	22
Fig. 20	Group field Header Visibility (example)	22
Fig. 21	Risk profiles (example)	23
Fig. 22	Create template (example)	24
Fig. 23	Create template - detail view (example).....	25
Fig. 24	Create template - detail view (example).....	27
Fig. 25	Define logical dependencies.....	28
Fig. 26	Logical dependencies - define source criterion	29
Fig. 27	Logical dependencies - define target criterion	29
Fig. 28	Show logical dependency	30
Fig. 29	Change logical dependency	31
Fig. 30	Show logical dependency	32
Fig. 31	Create or edit specific quality alarm.....	33
Fig. 32	Specific quality alarm - define details	34
Fig. 33	Specific quality alarm - time settings	35
Fig. 34	Specific quality alarm - notifications.....	36
Fig. 35	Specific quality alarm - registered user (example).....	36
Fig. 36	Specific quality alarm - select registered user (example)	37
Fig. 37	Specific quality alarm - edit registered user (example).....	37
Fig. 38	Specific quality alarm - select notification type (example)	37
Fig. 39	Specific quality alarm - remove registered user (example).....	38
Fig. 40	Specific quality alarm - add unregistered user.....	38
Fig. 41	Specific quality alarm - unregistered user (example).....	38

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

Fig. 84	Specific quality alarm - define details	65
Fig. 85	Specific quality alarm - time settings	66
Fig. 86	Specific quality alarm - notifications.....	67
Fig. 87	Specific quality alarm - registered user (example).....	67
Fig. 88	Specific quality alarm - select registered user (example)	68
Fig. 89	Specific quality alarm - edit registered user (example).....	68
Fig. 90	Specific quality alarm - select notification type (example)	68
Fig. 91	Specific quality alarm - remove registered user (example).....	69
Fig. 92	Specific quality alarm - add unregistered user.....	69
Fig. 93	Specific quality alarm - unregistered user (example).....	69
Fig. 94	Specific quality alarm - edit unregistered user (example).....	69
Fig. 95	Specific quality alarm - delete unregistered user (example).....	70
Fig. 96	Specific quality alarm - assign agents	70
Fig. 97	Agents.....	71
Fig. 98	Add agents from organization structure	71
Fig. 99	Agents (example).....	71
Fig. 100	Add own agents	72
Fig. 101	Remove agent assignment	72
Fig. 102	Delete specific quality alarm	72

List of tables

Glossary

URL

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