

INSPIRATION^{neo}

Template generator



User manual

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Product line Neo, version 7.x

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

INSPIRATION^{neo}

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2 Introduction

The template generator allows you to create the following templates in different modules:


- Evaluation Templates
- Training Package Templates
- Quiz Templates
- Training packages for sessions

These templates enable you to evaluate sessions and agents for instance or to compile a training package or a quiz. Depending on the module you are currently using, the template generator offers different elements to design the layout of the template.

To open the template generator, click on the icon  (*Create*) in the toolbar of the main view of the module you are currently using. A detailed description of how to create individual templates can be found in the user manuals of the respective modules of INSPIRATION^{neo}.

3

Create template

1. To go to the template generator, click on the icon  (*Create*) in the toolbar of the main view of the module you are currently using.
2. Select the respective menu item depending on your requirements and on the module you are using.
⇒ The following window opens automatically:

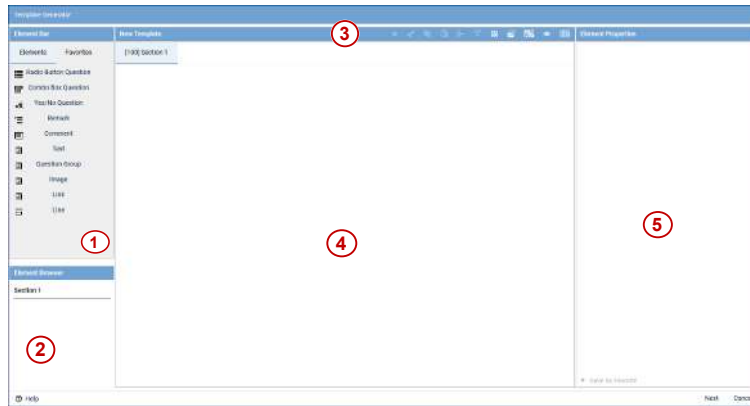


Fig. 1: Create template (example)

1	Element bar This area on the left side of the window contains the elements which are used to create templates. See chapter "Element bar", p. 20 .
2	Element browser In this area, an overview of the template's sections as well as the elements they contain is displayed. See chapter "Element browser", p. 28 and chapter "Add new section", p. 13 .
3	Toolbar This area contains the available control functions. See chapter "Toolbar of the template generator", p. 10 .
4	Working area Here, you arrange the elements.
5	Element properties In this area, you define the details of the selected elements. See chapter "Element properties", p. 29 .



Opens the online help.

3. In the element bar, either in the tab *Elements* or in the tab *Favorites*, click on the element you would like to insert (see [chapter "Tab Elements", p. 20](#) and [chapter "Tab Favorites", p. 24](#)).
⇒ The selected element is inserted into the working area.
⇒ The properties specific for the corresponding element are displayed in the element properties.
4. Design the element by editing the element-specific properties as required (see [chapter "Element properties", p. 29](#)).

5. Insert all elements that the template is supposed to contain.
If required, you can divide the template into sections (see [chapter "Add new section", p. 13](#) and [chapter "Edit section", p. 12](#)).
6. Organize the elements in the working area according to your requirements. To do so, use the functions in the toolbar (see [chapter "Toolbar of the template generator", p. 10](#)) or click on the individual elements to move them with the mouse cursor.
7. To save all changes in the cache and close the template generator, click on the button *Next*.
To discard all changes and close the template generator, click on the button *Cancel*.
⇒ The window of the template generator is closed.

All templates must at least contain one element. Empty templates cannot be saved.



When creating a Call Director customer survey, insert the same number of answers and questions in the working area of the template generator as have been created for this survey in the Call Director.

8. Adjust all necessary settings within the displayed tabs of the respective module. For a detailed description of the tabs refer to the user manuals of the respective modules of INSPIRATION^{neo}.
9. 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*.

4 **Toolbar of the template generator**

The toolbar offers the following functions:













Fig. 2: Toolbar of the template generator (example)

	<i>Delete</i>	Deletes the selected element, see chapter "Delete element in working area", p. 11.
	<i>Cut</i>	Cuts the selected element, see chapter "Cut and paste element in working area", p. 11.
	<i>Copy</i>	Copies the selected element, see chapter "Copy and paste element in working area", p. 11.
	<i>Paste</i>	Pastes the cut or copied element, see chapter "Cut and paste element in working area", p. 11 and chapter "Copy and paste element in working area", p. 11.
	<i>Align left</i>	Aligns all selected elements to the left, see chapter "Align elements left in working area", p. 11.
	<i>Align top</i>	Aligns all selected elements to the top, see chapter "Align elements in the working area to top", p. 11.
	<i>Toggle grid</i>	Toggles a grid in the working area, see chapter "Toggle grid in working area", p. 12.
	<i>Template settings</i>	Opens a window in which you can define the number of elements which must be critical so that the entire template/section or group is considered critical, see chapter "Edit template settings", p. 12.
	<i>Edit section</i>	Opens a window in which you can create, edit, and delete sections, see chapter "Edit section", p. 12).
	<i>Select rating scheme</i>	Opens the window <i>Select Rating Scheme</i> , see chapter "Select rating scheme", p. 16.
	<i>Skills</i>	Opens a window in which you can add the skills of agents, see chapter "Add skills", p. 17.
	<i>Show preview</i>	Shows a preview of the template which is edited at the moment, see chapter "Show preview", p. 18.
	<i>Summary</i>	Shows a summary of the template which is edited at the moment, see chapter "Show summary", p. 18.




Not all described icons exist in every module and application.

See also



-  Add skills [► 17]
-  Show summary [► 18]
-  Cut and paste element in working area [► 11]
-  Copy and paste element in working area [► 11]
-  Align elements left in working area [► 11]
-  Align elements in the working area to top [► 11]
-  Toggle grid in working area [► 12]
-  Edit section [► 12]
-  Select rating scheme [► 16]
-  Show preview [► 18]

 Delete element in working area [► 11]



4.1 Delete element in working area

1. In the working area or the element browser, click on the element you would like to delete.
To select several elements at the same time, click on the elements you would like to delete in the working area while holding the [Ctrl] key down.
⇒ The selected element is marked in the working area.
2. Click on the icon  (*Delete*).
3. To really delete the selected element confirm the security prompt.


4.2 Cut and paste element in working area

1. In the working area or the element browser, click on the element you would like to cut. To select several elements at the same time, click on the elements you would like to cut in the working area while holding the [Ctrl] key down.
⇒ The selected element is marked in the working area.
2. Click on the icon  (*Cut*).
3. Click on the icon  (*Paste*).
You can also paste the element several times in different sections.
⇒ The pasted element is displayed as the last element in the current working area.


4.3 Copy and paste element in working area

1. In the working area or the element browser, click on the element you would like to copy. To select several elements at the same time, click on the elements you would like to copy in the working area while holding the [Ctrl] key down.
⇒ The selected element is marked in the working area.
2. Click on the icon  (*Copy*).
3. Click on the icon  (*Paste*).
4. You can also paste the element several times in different sections.
⇒ The pasted element is displayed as the last element in the current working area.

4.4 Align elements left in working area

1. In the working area or the element browser, click on the element you would like to align the subsequently selected elements by.
2. In the working area or the element browser, hold the [Ctrl] key down and click on the elements you would like to align.
3. Click on the icon  (*Align left*).
⇒ All selected elements in the working area will be aligned left by the element you selected first.

4.5 Align elements in the working area to top

1. In the working area or the element browser, click on the element you would like to align the subsequently selected elements by.
2. In the working area or the element browser, hold the [Ctrl] key down and click on the elements you would like to align.
3. Click on the icon  (*Align top*).
⇒ All selected elements in the working area will be aligned top by the element you selected first.

4.6 Toggle grid in working area

The grid in the working area is a support tool to position the elements. When the elements are moved, they position themselves in the top left corner of the grid.

To toggle the grid in the working area, click on the icon  (*Toggle grid*).

4.7 Edit template settings

Here, you can define the number of elements which must be critical so that the entire template is considered critical. The value *1* has been preselected by default, i. e. the template is considered critical as soon as one element is defined as critical. If the evaluation is not supposed to be so strict, higher values can be entered: In the entry field *Critical from* enter *3* for instance so that the template is considered critical when it contains three or more critical elements.

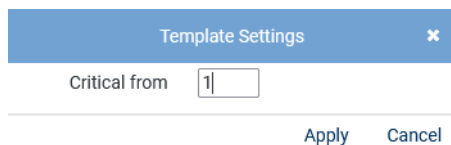



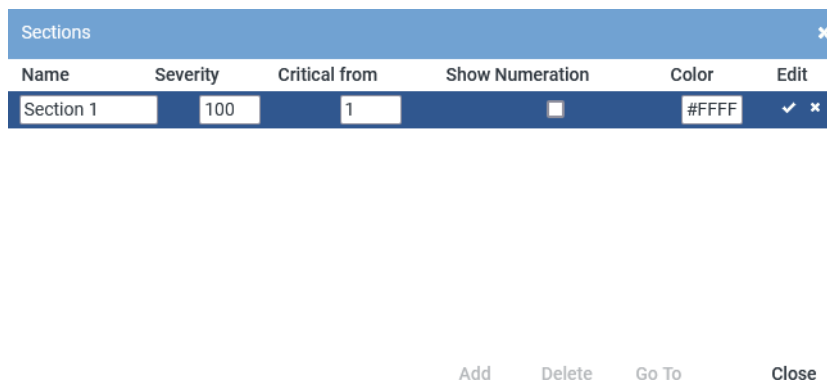
Fig. 3: Template Settings: Critical from

1. To save the changes, click on the button *Apply*.
To discard the changes, click on the button *Cancel*.

4.8 Edit section

This function of the toolbar allows creating new sections and changing existing ones.

1. Click on the icon  (*Edit section*).
⇒ The window *Sections* appears.




Name	Severity	Critical from	Show Numeration	Color	Edit
Section 1	100	1	<input type="checkbox"/>	#FFFF	✓ ✕


Add Delete Go To Close

Fig. 4: Edit sections (example)

In the default setting, one section has been created automatically.

2. To edit an existing section, click on the icon  (*Edit*).
3. Change the properties of the section as required.

Sections ×

Name	Severity	Critical from	Show Numeration	Color	Edit
Section 1	100	1	<input type="checkbox"/>	<input type="text"/>	



Add
Delete
Go To
Close

Fig. 5: Edit sections (example)


Name	Enter a name for the section. This name will be displayed in the element browser.
Severity	Field in which you can define the importance of section for the evaluation. As severity, you can enter a value between 0 and 100. The value 0 is used for supplementary questions which are not evaluated. The severity of the sections has to amount to 100 in total or every section has a severity of 100 or 0.
Critical from	Here, you can define the number of elements from which on the template is supposed to be considered as critical.
Show Numeration	Here, you determine whether a consecutive numeration is added to every element in the section. <input checked="" type="checkbox"/> = Numeration is displayed. <input type="checkbox"/> = Numeration is not displayed. The numeration is displayed in the element in front of the question or question group. If you change the sequence of the positions, the numeration changes accordingly.
Color	Define the background color for the working area of the section, see chapter "Change color", p. 55 .




The function *Severity* is only available when creating evaluation templates and quiz templates.

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

See also

 [Change color \[► 55\]](#)

4.8.1 Add new section

- Click on the icon  (*Edit section*).
⇒ The window *Sections* appears.

Sections						✕
Name	Severity	Critical from	Show Numeration	Color	Edit	
Section 1	100	1	<input type="checkbox"/>	#FFFF	✓ ✕	

Add Delete Go To Close

Fig. 6: Edit sections

- Click on the button *Add*.
⇒ A section is added.

Sections						✕
Name	Severity	Critical from	Show Numeration	Color	Edit	
Section 1	100	1	<input type="checkbox"/>	<input type="text"/>		
Section 2	100	1	<input type="checkbox"/>	<input type="text"/>		

Add Delete Go To Close

Fig. 7: Section added

- To close the window *Sections*, click on the button *Close* or

4.8.2 Delete section

You have 2 options to delete the section.

4.8.2.1 Delete section - possibility 1

- Above the working area in the tab with the section name, click on the icon .

[100] Section 1 ✕
[100] Section 2 ✕

Please read the document "Example1" before answering the following questions.


Example1



100	How well does the agent work with the voice mailing system?	<input type="radio"/> Excellent <input type="radio"/> Good <input type="radio"/> Average <input type="radio"/> Sufficient <input type="radio"/> Bad <input checked="" type="radio"/> N/A
100	How well does the agent adhere to the telephone guideline?	<input type="radio"/> Excellent <input type="radio"/> Good <input type="radio"/> Average <input type="radio"/> Sufficient <input type="radio"/> Bad <input checked="" type="radio"/> N/A

Fig. 8: Select section

- To really delete the section, confirm the security prompt.

4.8.2.2 Delete section - possibility 2



- Click on the icon  (*Edit section*).
⇒ The window *Sections* appears.

Sections ×					
Name	Severity	Critical from	Show Numeration	Color	Edit
Section 1	100	1	<input type="checkbox"/>	<input type="text"/>	
Section 2	100	1	<input type="checkbox"/>	<input type="text"/>	

Add Delete Go To Close


Fig. 9: Sections

- Select the section you would like to delete and click on the button *Delete*.

Sections ×					
Name	Severity	Critical from	Show Numeration	Color	Edit
Section 1	100	1	<input type="checkbox"/>	<input type="text"/>	
Section 2	100	1	<input checked="" type="checkbox"/>	<input type="text"/>	

Add Delete Go To Close

Fig. 10: Section selected

- To really delete the section, confirm the security prompt.
- To close the window *Sections*, click on the button *Close* or .

4.8.3 Change section

You have 2 options to change the section.

4.8.3.1 Change section - possibility 1

- Above the working area, click on the tab with the section name.

[100] Section 1 ×

[100] Section 2 ⌵


Please read the document "Example1" before answering the following questions.



Example1

100	How well does the agent work with the voice mailing system?	<input type="radio"/> Excellent <input type="radio"/> Good <input type="radio"/> Average <input type="radio"/> Sufficient <input type="radio"/> Bad <input checked="" type="radio"/> N/A
100	How well does the agent adhere to the telephone guideline?	<input type="radio"/> Excellent <input type="radio"/> Good <input type="radio"/> Average <input type="radio"/> Sufficient <input type="radio"/> Bad <input checked="" type="radio"/> N/A

Fig. 11: Change section

4.8.3.2 Change section - possibility 2


- Click on the icon  (*Edit section*).
⇒ The window *Sections* appears.

Sections ×					
Name	Severity	Critical from	Show Numeration	Color	Edit
Section 1	100	1	<input type="checkbox"/>	<input type="text"/>	
Section 2	100	1	<input type="checkbox"/>	<input type="text"/>	

Add Delete Go To Close

Fig. 12: Sections

- Select the section you would like to change to and click on the button *Go To*.

Sections ×					
Name	Severity	Critical from	Show Numeration	Color	Edit
Section 1	100	1	<input type="checkbox"/>	<input type="text"/>	
Section 2	100	1	<input checked="" type="checkbox"/>	<input type="text"/>	

Add Delete Go To Close

Fig. 13: Change section

4.9 Select rating scheme

- Click on the icon  (*Select rating scheme*).
⇒ The window *Select Rating Scheme* opens.

Select Rating Scheme ×	
Name	Description
1-5 Bewertungsschema	Verwendet die Noten 1-5
Default (0%-100%)	Verwendet Prozentwerte (0%-100%).
A-F Bewertungsschema	Verwendet die Noten A-F...

Apply Cancel

Fig. 14: Select rating scheme

- Select the respective rating scheme and click on the button *Apply*.

Select Rating Scheme

×

Name	Description
1-5 Bewertungsschema	Verwendet die Noten 1-5
Default (0%-100%)	Verwendet Prozentwerte (0%-100%).
A-F Bewertungsschema	Verwendet die Noten A-F...

Apply


Cancel

Fig. 15: Select and apply rating scheme

- To change the rating scheme, confirm the security prompt.

4.10

Add skills

- Click on the icon  (*Skills*).
⇒ The window *Skills* appears.

Skills

×

Skill Name

Direct Sales

Invoice

Social Media

Store Copenhagen

Store Berlin

Fig. 16: Add skills

- Select the respective skill and click on the button *Apply*.
⇒ The skill appears in the template as section.




To be able to use the function *Skills*, the Teleopti CCC connection must have been activated in the application System Configuration in the Applications module.

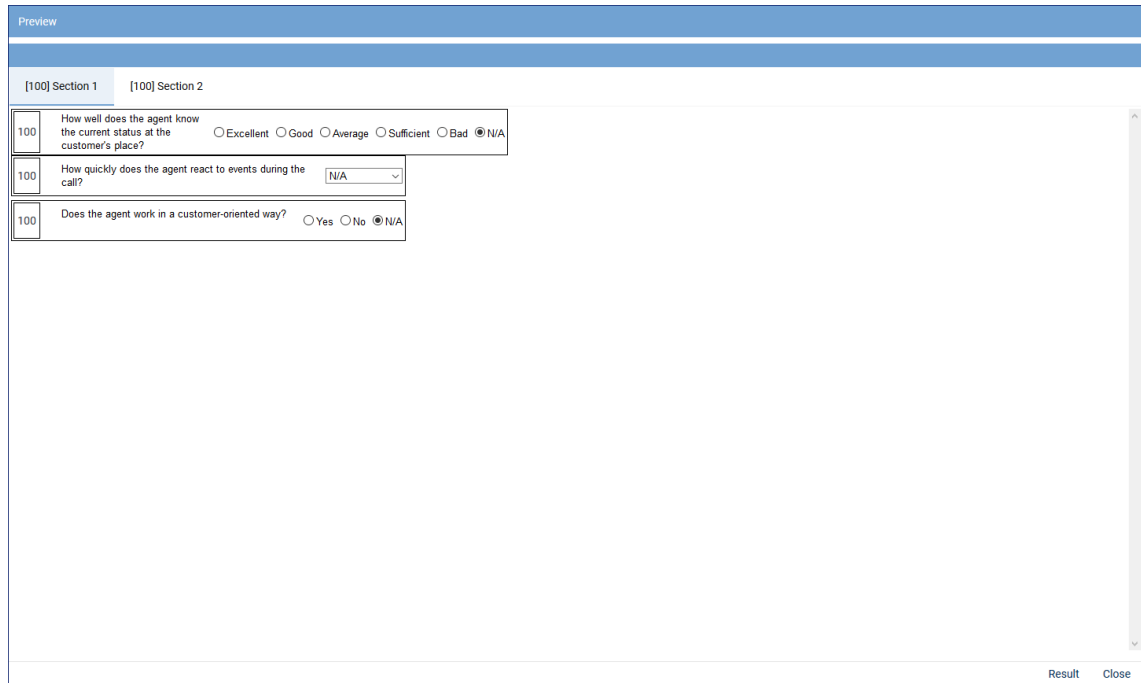


For information about the configuration of the Teleopti interface refer to the administration manual for tenants *System Configuration - Configuration Teleopti interface*.

4.11 Show preview

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

1. Click on the icon  (*Show preview*).
⇒ The window *Preview* appears.



Preview

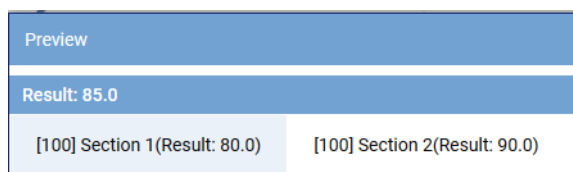
[100] Section 1 [100] Section 2

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

Result Close

Fig. 17: Preview

2. 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.
3. 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.



Preview

Result: 85.0

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

Fig. 18: Preview result

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

4.12 Show summary

This function allows displaying the essential information of a template in a tabular overview and printing it.




1. 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. 19: Load summary (example)

The following functions are available:

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

5 Element bar

The element bar contains the following tabs:

- Elements
Contains all elements which can be positioned in the working area.
- Favorites
Contains elements that have been saved as favorite.

5.1 Tab Elements

The tab *Elements* contains all elements which can be positioned in the working area.

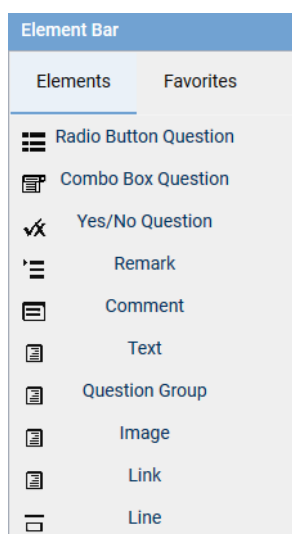


Fig. 20: Element bar (example)

In general, the following elements are available:

Element	Description
<i>Radio Button Question</i>	Question with 5 definable answers. The number of answers can be increased arbitrarily or reduced to 1 answer. The default answers depend on the rating scheme. During the evaluation, you can only select 1 of the answers. See chapter "Element Radio Button Question", p. 21 .
<i>Combo Box Question</i>	Question with 5 definable answers. The number of answers can be increased arbitrarily or reduced to 1 answer. The default answers depend on the rating scheme. During the evaluation, you can only select 1 of the answers. See chapter "Element Combo Box Question", p. 21 .
<i>Yes/No Question</i>	This question can only be answered with Yes or No. See chapter "Element yes/no question", p. 22 .
<i>Remark</i>	List of answers which allows adding remarks to conversations or sections. In this element, there is no quantification. It does not influence the score of the evaluation. See chapter "Element Remark", p. 22 .
<i>Comment</i>	In this text field, the user of the template can enter a comment. In this element, there is no quantification. It does not influence the score of the evaluation. See chapter "Element Comment", p. 22 .

Element	Description
<i>Text</i>	Text field which allows adding display text. Use this element to create headlines or to mark your template with remarks. See chapter "Element text", p. 22.
<i>Question Group</i>	This element offers the possibility to combine different question elements in one group. See chapter "Element Question Group", p. 22.
<i>Image</i>	This element offers the possibility to insert images. Use this element, e. g. to insert your company logo. See chapter "Element image", p. 22.
<i>Link</i>	This element offers the possibility to insert hyperlinks and mark them with a remark as an instruction for usage. See chapter "Element Link", p. 23.
<i>Line</i>	This element offers the possibility to insert a line. See chapter "Element line", p. 23.
<i>Multiple Choice Question</i>	This question contains several predefined answers. During the evaluation, you can select one, several or all of these answers. See chapter "Element Multiple Choice Question", p. 23
<i>0 - 1 Question</i>	This question has exactly 2 answer possibilities. The answers do not contain text but only numerical values. During the evaluation, you can only select 1 of the answers. This element is only available for customer surveys. See chapter "Element 0 - 1 Question", p. 23.
<i>0 - 9 Question</i>	This question has a maximum of 9 answer possibilities. The answers do not contain text but only numerical values. During the evaluation, you can only select 1 of the answers. This element is only available for customer surveys. See chapter "Element 0 - 9 Question", p. 23.
<i>Customer Comment</i>	In this text field, the user of the template can enter a customer's comment. This element is only available for customer surveys. In this element, there is no quantification. It does not influence the score of the evaluation. See chapter "Element Customer Comment", p. 23.



Depending on the type of the template, all or only a selection of the described elements are displayed.

5.1.1 Element Radio Button Question

By clicking on the button *Radio Button Question*, the following default question is inserted into the working area:

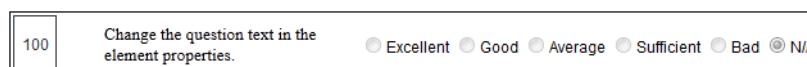
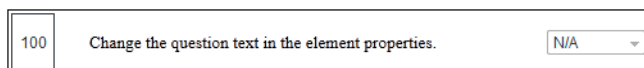


Fig. 21: Radio Button Question

5.1.2 Element Combo Box Question

By clicking on the button *Combo Box Question*, the following default question is inserted into the working area:

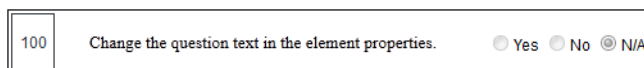


A horizontal bar with a small box on the left containing the number '100'. To its right is the text 'Change the question text in the element properties.' On the far right is a dropdown menu currently showing 'N/A'.

Fig. 22: Combo Box Question

5.1.3 Element yes/no question

By clicking on the button *Yes/No Question*, the following default question is inserted into the working area:



A horizontal bar with a small box on the left containing the number '100'. To its right is the text 'Change the question text in the element properties.' Further right are three radio buttons labeled 'Yes', 'No', and 'N/A', with 'N/A' being the selected option.

Fig. 23: Yes/No Question

5.1.4 Element Remark

By clicking on the button *Remark*, the following element is inserted into the working area:



A horizontal bar with the word 'Remark' on the left and a dropdown menu on the right currently showing 'New remark'.

Fig. 24: Remark

5.1.5 Element Comment

By clicking on the button *Comment*, the following element is inserted into the working area:



A horizontal bar with the word 'Comment' on the left and a large empty rectangular text input area on the right.

Fig. 25: Comment

5.1.6 Element text

By clicking on the button *Text*, the following element is inserted into the working area:

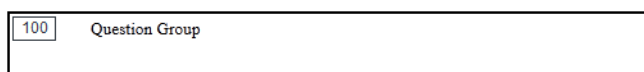


A horizontal bar with the word 'Text' on the left and a large empty rectangular text input area on the right.

Fig. 26: Text

5.1.7 Element Question Group

By clicking on the button *Question Group*, the following element is inserted into the working area:



A horizontal bar with a small box on the left containing the number '100'. To its right is the text 'Question Group'.

Fig. 27: Question Group

5.1.8 Element image

By clicking on the button *Image*, the following element is inserted into the working area:



Fig. 28: Image

5.1.9 Element Link

By clicking on the button *Link*, the following element is inserted into the working area:



Fig. 29: Link

5.1.10 Element line

By clicking on the button *Line*, the following element is inserted into the working area:



Fig. 30: Line

5.1.11 Element Multiple Choice Question



This element is only available for quiz templates.

By clicking on the button *Multiple Choice Question*, the following default question is inserted into the working area:

100	Change the question text in the element properties.	<input type="checkbox"/> New answer	<input type="checkbox"/> New answer	<input type="checkbox"/> New answer	<input type="checkbox"/> New answer	<input type="checkbox"/> New answer
-----	---	-------------------------------------	-------------------------------------	-------------------------------------	-------------------------------------	-------------------------------------

Fig. 31: Multiple Choice Question

5.1.12 Element 0 - 9 Question



This element is only available for customer surveys.

By clicking on the button *0 - 9 Question*, the following default question is inserted into the working area:

100	Change the question text in the element properties.	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> *
-----	---	---

Fig. 32: 0 - 9 Question

5.1.13 Element 0 - 1 Question



This element is only available for customer surveys.

By clicking on the button *0 - 1 Question*, the following default question is inserted into the working area:

100	Change the question text in the element properties.	<input type="radio"/> 0 <input type="radio"/> 1
-----	---	---

Fig. 33: 0 - 1 Question

5.1.14 Element Customer Comment



This element is only available for customer surveys.

By clicking on the button *Customer Comment*, the following element is inserted into the working area:



Fig. 34: Customer Comment

5.2

Tab Favorites

In the tab *Favorites*, all elements are displayed which have been saved as favorites.

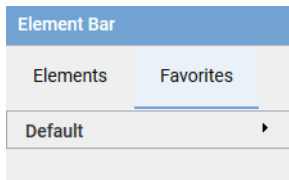


Fig. 35: Tab Favorites

Every element which has been pasted into the current template can be saved as favorite. The favorites allow you to save frequently used elements, including the configured element properties, and insert them quickly and easily into other templates.

5.2.1

Save element as favorite

1. In the working area, click on the element you would like to save as favorite.
2. Click on the button *Save as Favorite* in the detail view.

Element Properties

General

Name *

Link 1

(Allowed file types: .TXT, .PDF, .DOC, .PNG)

☒

Add link

...

☐

Web address (e. g. <http://www.google.de>)

Name

URL

Description

Layout

★ Save as Favorite

Fig. 36: Save element as favorite (example)

3. Select the category you would like to save the element in.

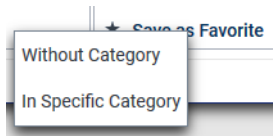


Fig. 37: Select favorite category

- *Without Category*

The element is automatically saved in the category *Standard*.

- *In Specific Category*

You can select in which category you would like to save the element, see [chapter "Save favorite in specific category", p. 25](#).

5.2.1.1 Save favorite in specific category

1. Click on the option *In Specific Category*.

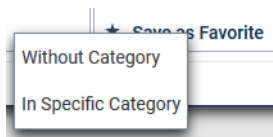


Fig. 38: Select favorite category

2. On the left of the following window, select the respective category.

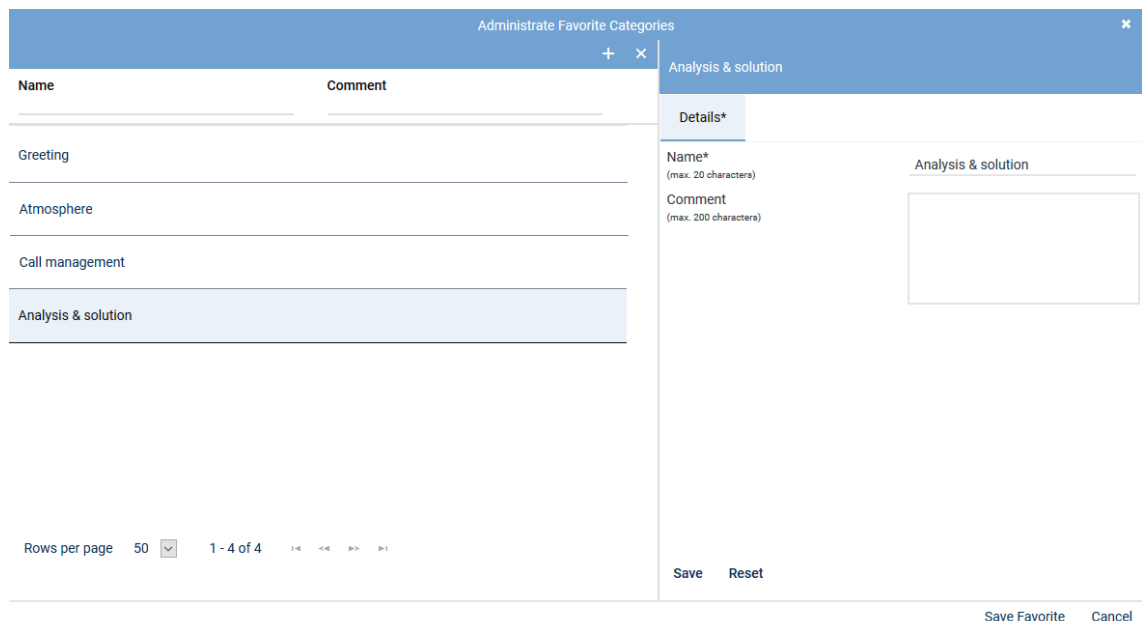


Fig. 39: Select favorite category

3. To save the favorite in the selected category, click on the button *Save Favorite*.
To discard the selection and close the window, click on the button *Cancel*.

If no appropriate category exists, you can create a new category (see [chapter "Create favorite category", p. 25](#)).

5.2.1.2 Create favorite category

1. Click on the button *Save as Favorite* and select the option *In Specific Category*.

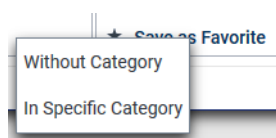



Fig. 40: Select favorite category

- To create a new favorite category, click on the icon  (*Create new favorite category*).

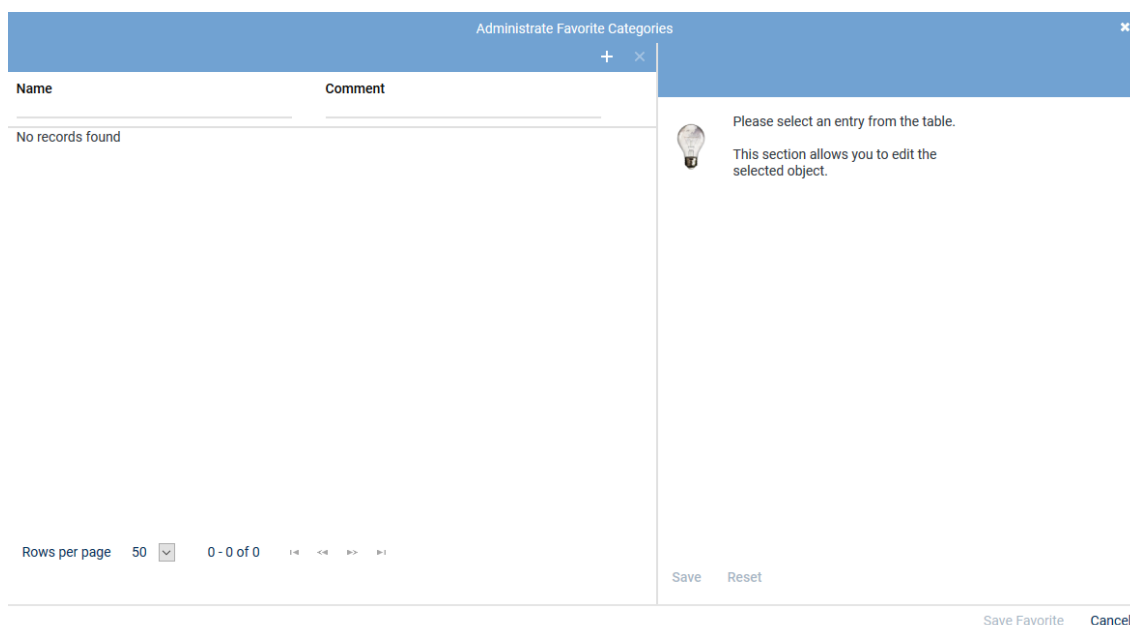


Fig. 41: Create new favorite category

- Enter a name for the favorite category in the entry field *Name*.
- If required, enter a comment for the favorite category in the entry field *Comment*.
- To save the new favorite category, click on the button *Save*.
To discard the changes, click on the button *Reset*.

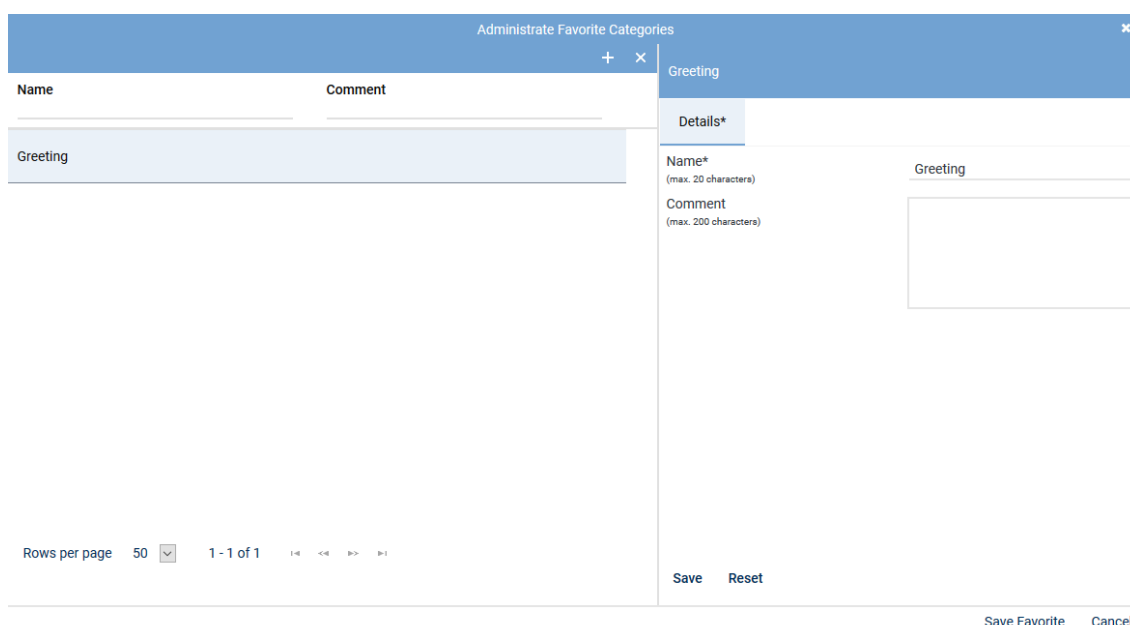



Fig. 42: Enter new favorite category and save

- To delete a favorite category, select the respective favorite category, click on the icon  (*Delete selected favorite category*) and confirm the security prompt.
⇒ The selected favorite category is deleted.

5.2.1.3 Delete favorite category

1. Click on the button *Save as Favorite* and select *In Specific Category*.

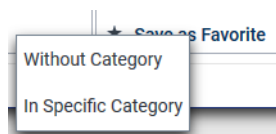



Fig. 43: Select favorite category

2. Select the favorite category you would like to delete from the list and click on the icon  (*Delete selected favorite category*).

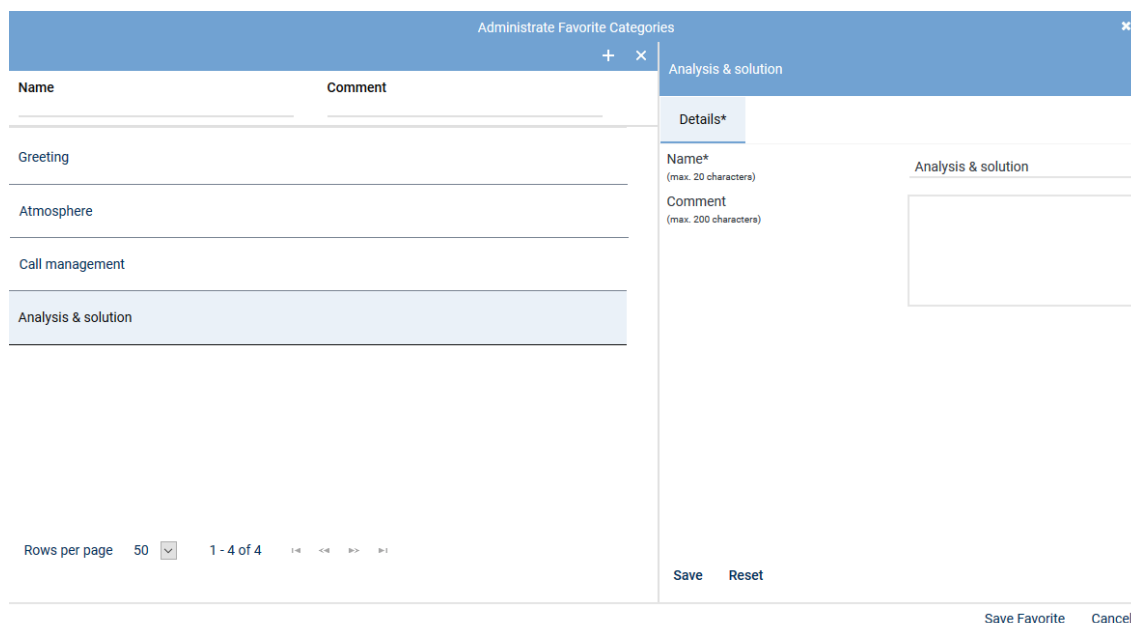


Fig. 44: Delete favorite category

3. Confirm the security prompt to define details of the delete process.

Yes	The content of the category is moved to the standard category before it is deleted.
No	The category and the content of the category are deleted.
Cancel	The delete process is canceled.

6 Element browser

In the element browser, all sections and their contained elements are listed.

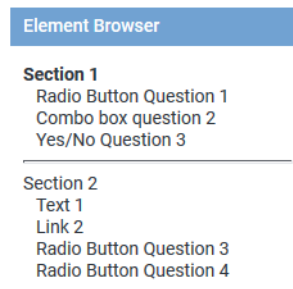


Fig. 45: Element Browser (example)

The element browser allows selecting an element directly from any section.

6.1 Select element

1. In the element browser, click on the name of the element.
 - ⇒ The respective section which contains the element is displayed in the working area.
 - ⇒ In the working area, the respective element has been selected.

Element properties

In the window *Element Properties*, detailed information about the elements is displayed.

Element Properties

General

Name *

Link 1

(Allowed file types: .TXT, .PDF, .DOC, .PNG)

☒ Add link

...

☐ Web address (e. g. <http://www.google.de>)

Name

URL

Description

Layout

★ Save as Favorite

Fig. 46: Element Properties (example)

The element properties allow you to design each element individually (see [chapter "Element bar", p. 20](#)).

The available element properties depend on the particular element.

7.1

General

The element property *General* is available in all elements. Depending on the selected element, besides the name you can add a link or an image for instance.

General

Name *

Link 2

(Allowed file types: .TXT, .PDF, .DOC, .PNG)

☒ Add link

...

☐ Web address (e. g. <http://www.google.de>)

Name


URL

Fig. 47: Element property *General* (example by reference to the element *Link*)

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Depending on the element you are editing, the following individual settings can be configured:

<i>Name</i>	Enter a name for the element. This name is displayed in the element browser and used as favorite name.
<i>Question ID</i>	Enter an ID for the question. The question ID can be the same for several elements. In a report, all answers to questions with the same ID can be displayed.
<i>Question is optional</i>	Define whether the question is optional or not. <input checked="" type="checkbox"/> = The question is optional. An answer is not mandatory. <input type="checkbox"/> = The question is not optional. An answer is mandatory.
<i>Activate note</i>	Define whether a note field is supposed to be added to the question. <input checked="" type="checkbox"/> = Note field is added. <input type="checkbox"/> = Note field is not added. In the template, the note field is displayed by the icon  . By clicking on this icon, the user can open the note field and enter a note.
<i>Add audio</i>	Insert an audio file here which contains the question (see chapter "Upload and add new audio file", p. 30). Allowed file types: .mp3, .mp4, .wav Maximum file size: 5 MB
<i>Add link</i>	Select the link to an uploaded file (see chapter "Add link", p. 33). Allowed file types: .txt, .pdf, .doc, .png Maximum file size: 5 MB
<i>Web address</i>	Enter a link to a web address (see chapter "Add web address", p. 37).
<i>Add image</i>	Select the image you would like to insert (see chapter "Add image from the file list", p. 40). Allowed file types: .jpg, .png, .gif Maximum file size: 5 MB
<i>Background image</i>	Define whether the image is supposed to be displayed as background image. <input checked="" type="checkbox"/> = Image is displayed in the background. <input type="checkbox"/> = Image is displayed in the foreground.

7.1.1 Upload and add new audio file

1. Click on the button

▼ General

Name *


Question ID

Question is optional ☐

Add audio * (Allowed file types: .mp3, .mp4, .wav)

...

Fig. 48: Add audio file

2. Click on the icon  (Add file).

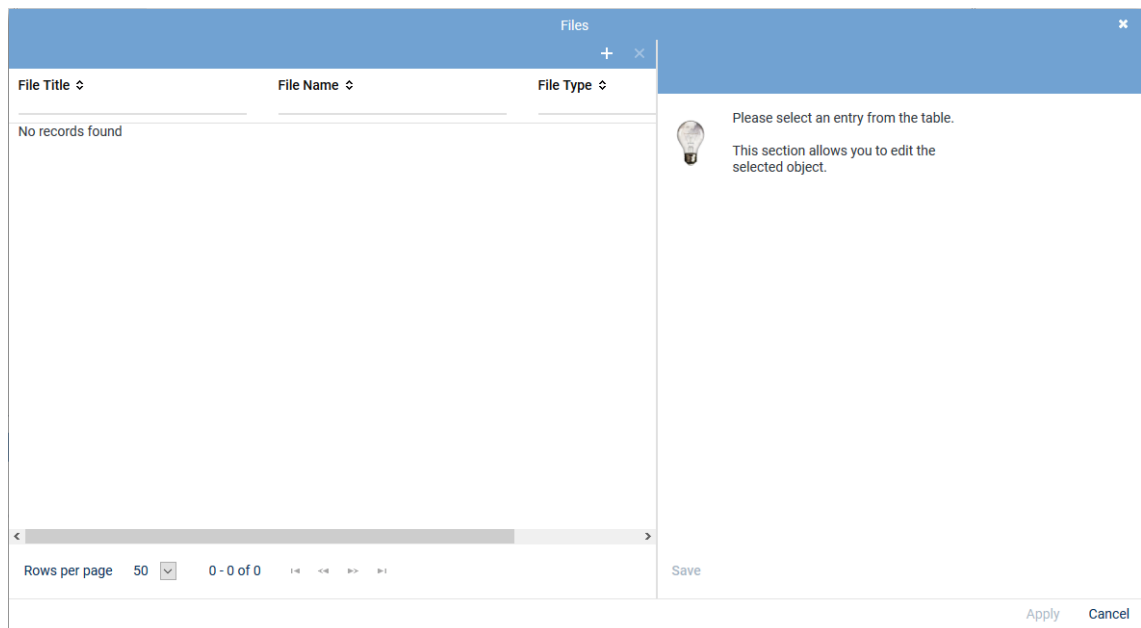


Fig. 49: Add file

- Click on the button *Upload File*.

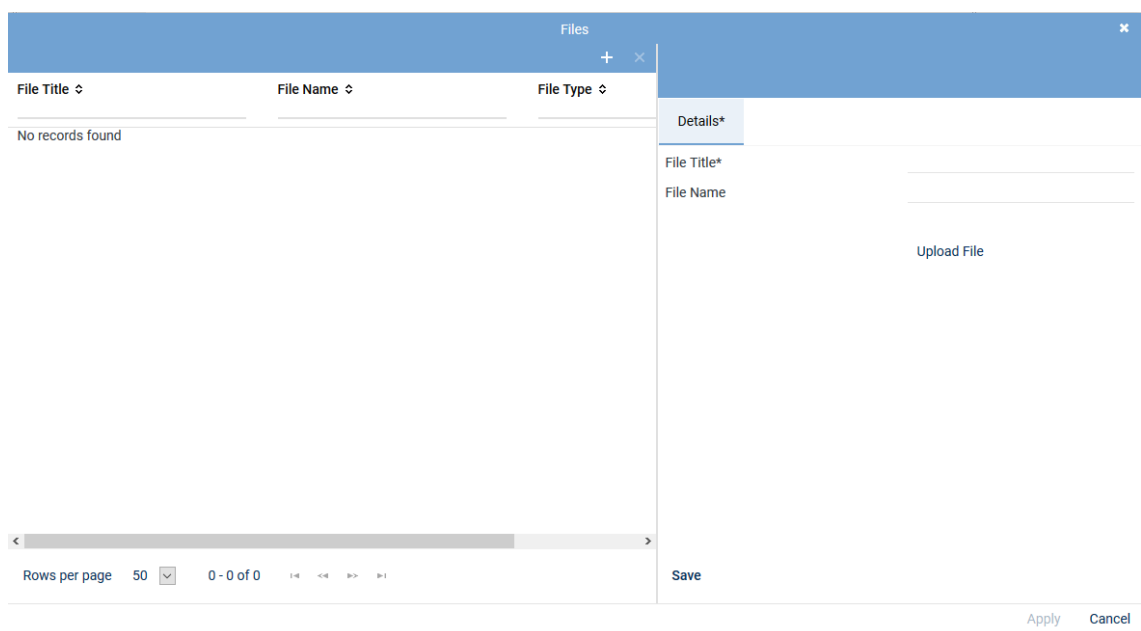


Fig. 50: Upload File

The audio file appears in the element on the right side as  icon.

7.1.2 Add audio file from the file list

- Click on the button .

▼ General

Name *

Question ID

Question is optional ☐

Add audio * (Allowed file types: .mp3, .mp4, .wav)

...

Fig. 51: Add audio file

2. Select a file from the list and click on the button *Apply*.
To discard the selection and close the window, click on the button *Cancel*.

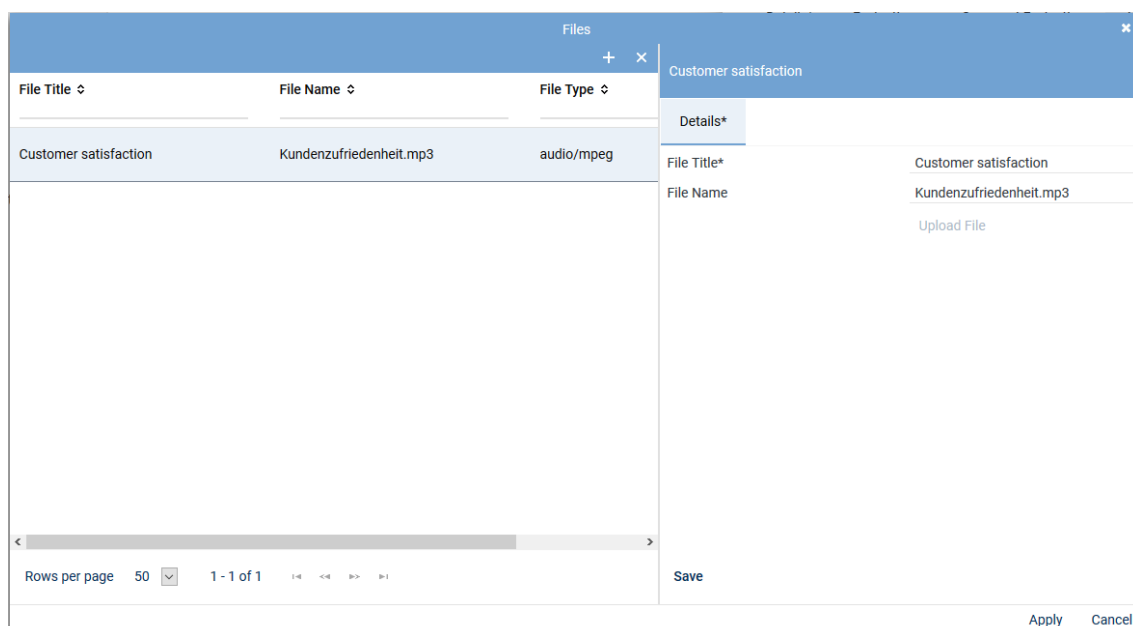


Fig. 52: Apply file to the element

The audio file appears in the element on the right side as  icon.

7.1.3

Delete audio file from the file list

1. Click on the button ...

▼ General

Name *

Question ID

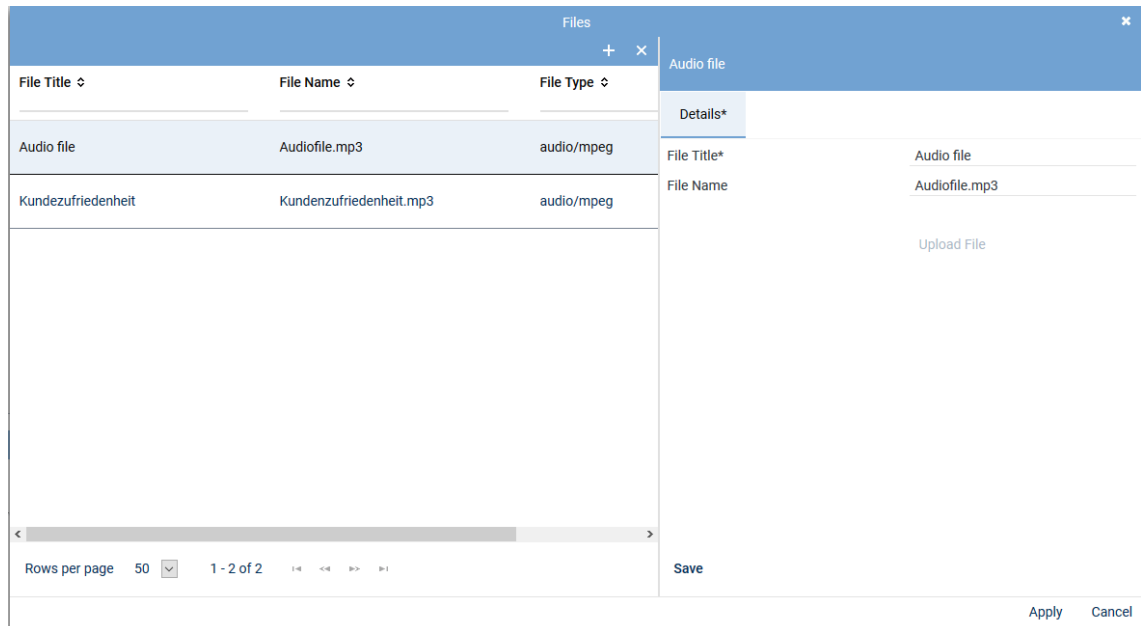
Question is optional ☐

Add audio * (Allowed file types: .mp3, .mp4, .wav)

...

Fig. 53: Add audio file

2. Select the file you would like to delete and click on the icon  (*Delete*).



File Title	File Name	File Type
Audio file	Audiofile.mp3	audio/mpeg
Kundenzufriedenheit	Kundenzufriedenheit.mp3	audio/mpeg

Rows per page: 50 | 1 - 2 of 2 | < << >> >


Save

Apply Cancel

Fig. 54: Delete file



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  (*Delete*).

7.1.4

Add link

- Activate the option *Add link*.

General

Name *

(Allowed file types: .TXT, .PDF, .DOC, .PNG)



☒ Add link

☐ Web address (e. g. <http://www.google.de>)

Name

URL

Fig. 55: Add link

- Click on the button .
- Click on the icon  (*Add file*).

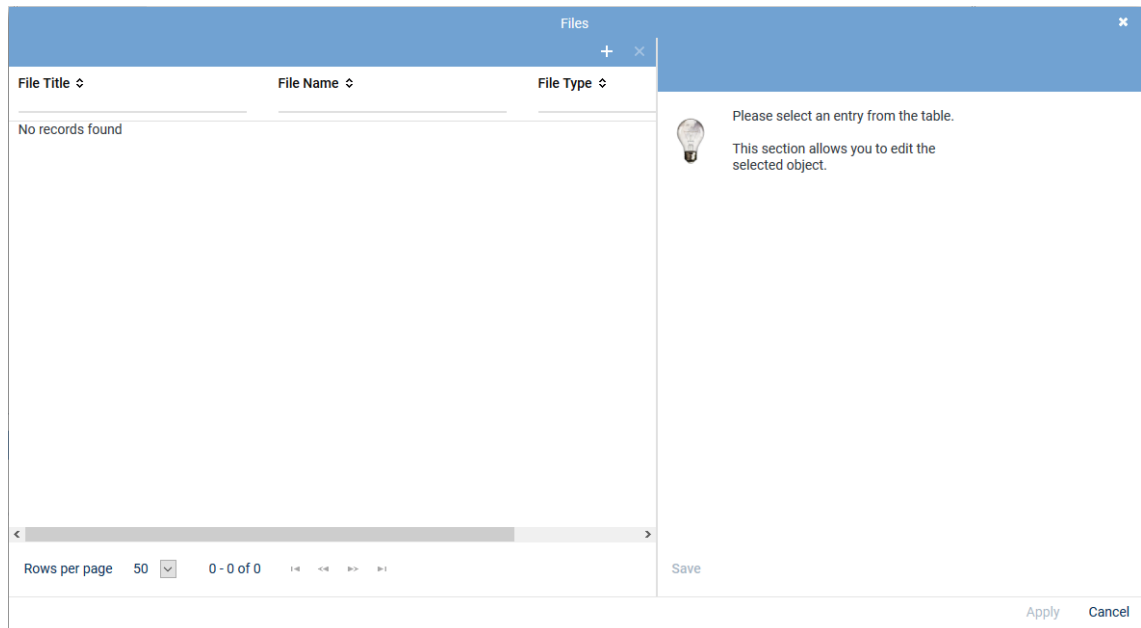


Fig. 56: Add file

4. Click on the button *Upload File*.

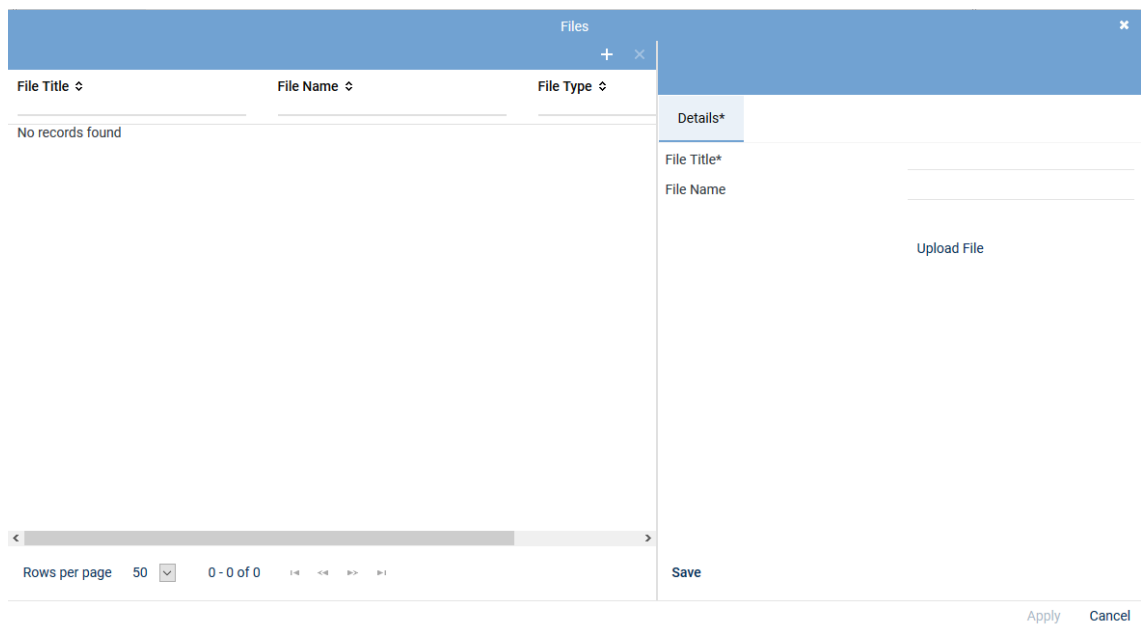


Fig. 57: Upload File

5. Click on the button *Choose File*.

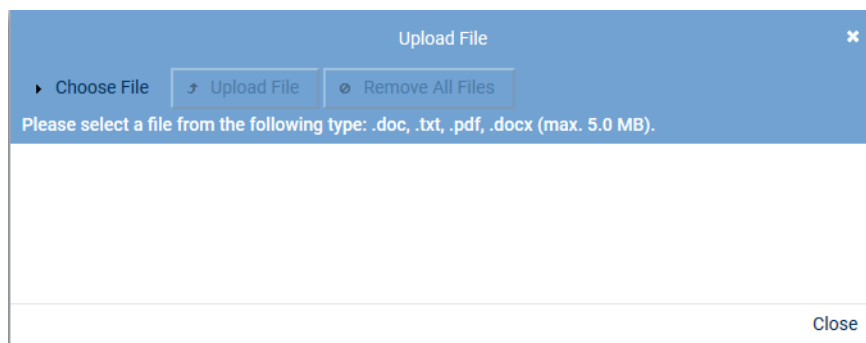


Fig. 58: Choose file

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

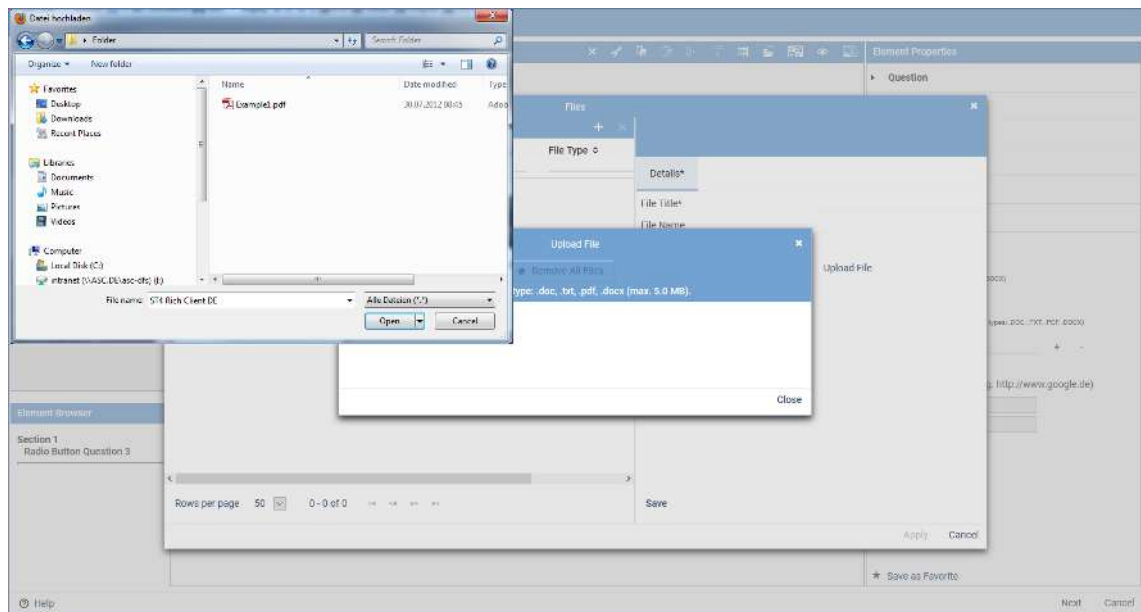




Fig. 59: Open file

7. To upload the file, click on the button  (*Upload file*).
If you would like to remove the selected file and select a different file, click on the button  (*Remove file*).

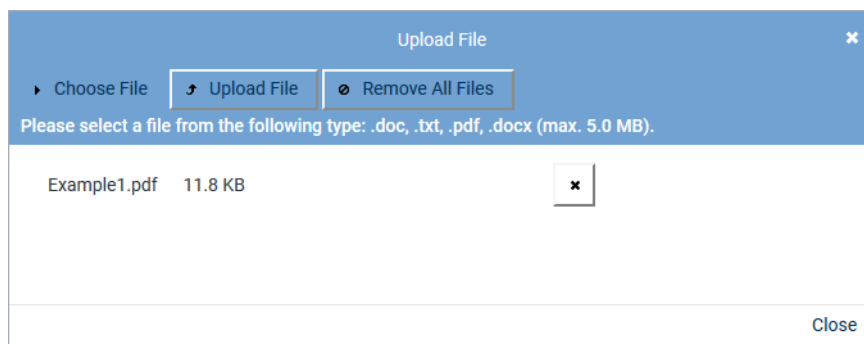
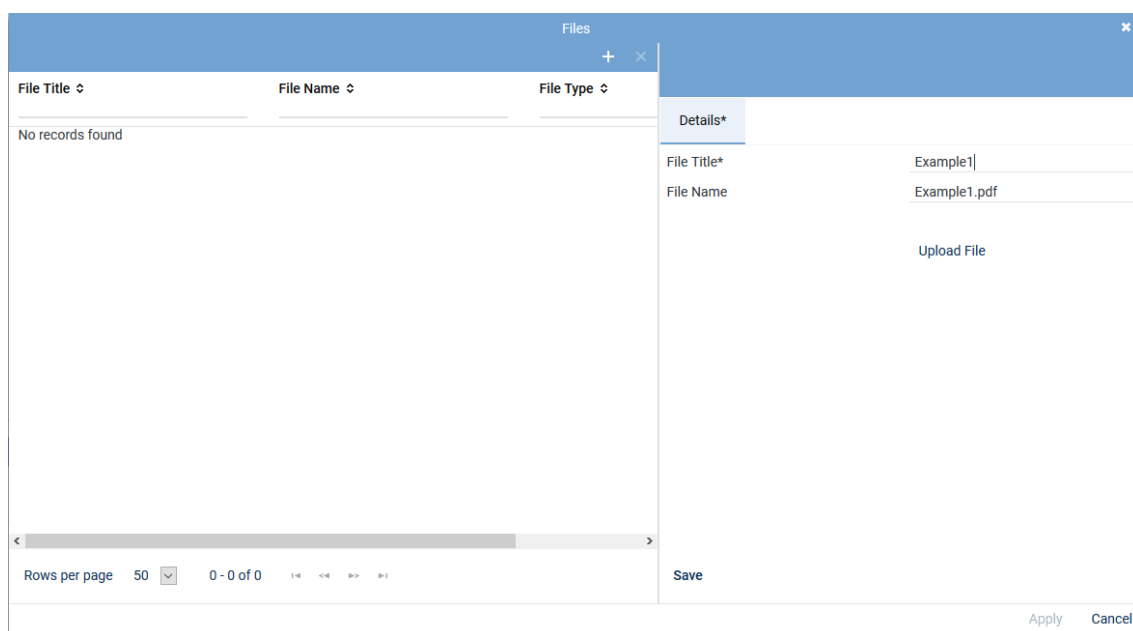


Fig. 60: Upload File

8. To save the uploaded file in the file list, click on the button *Save*.



File Title	File Name	File Type
No records found		

Details*

File Title* Example1

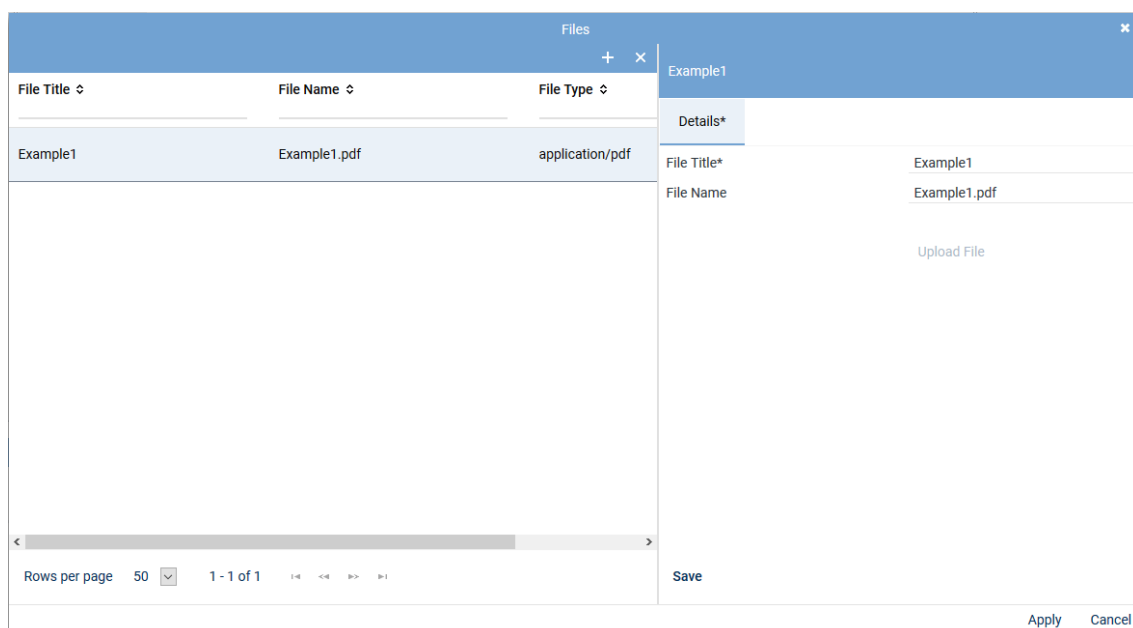
File Name Example1.pdf

Upload File

Save

Fig. 61: Save file in file list

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



File Title	File Name	File Type
Example1	Example1.pdf	application/pdf

Example1

Details*

File Title* Example1

File Name Example1.pdf

Upload File

Save

Fig. 62: Apply file to the element

7.1.5 Add link from the file list

- Activate the option *Add link*.

▼ General

Name *

(Allowed file types: .TXT, .PDF, .DOC, .PNG)

☒ Add link


_____ ...

☐ Web address (e. g. <http://www.google.de>)

Name

URL

Fig. 63: Add link

- Click on the button .
- Select a file from the list and click on the button *Apply*.
To discard the selection and close the window, click on the button *Cancel*.

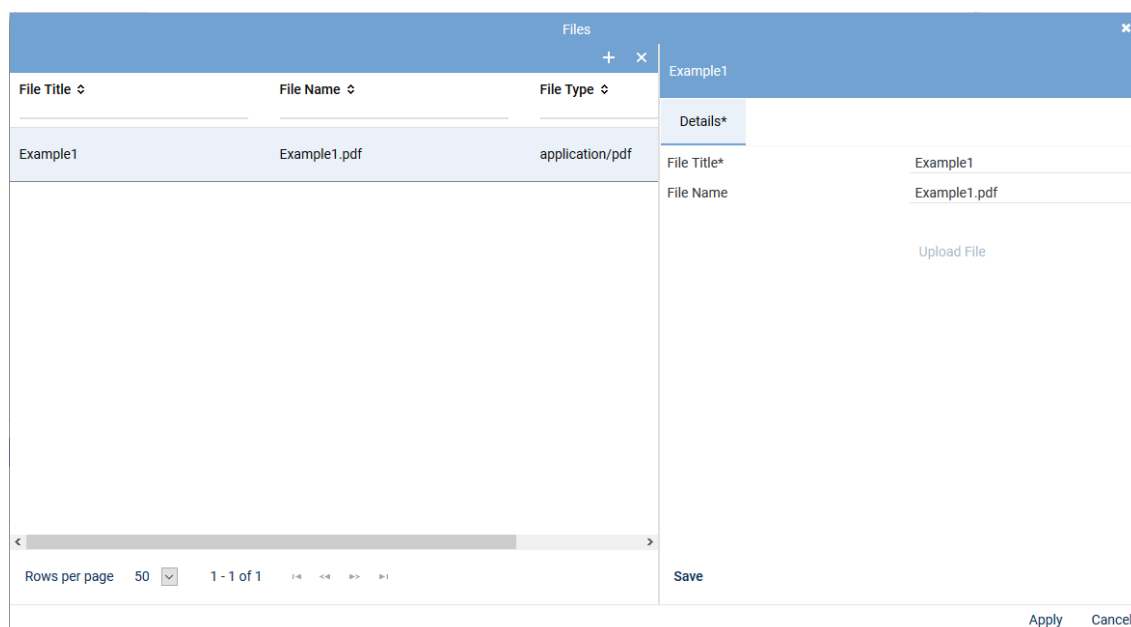


Fig. 64: Apply file from file list

7.1.6

Add web address

- Activate the option *Web address*.

▼ General

Name *

(Allowed file types: .TXT, .PDF, .DOC, .PNG)

☐ Add link

_____ ...

☒ Web address (e. g. <http://www.google.de>)

Name

URL

Fig. 65: Add web address

- In the field *Title*, enter the name which is supposed to be displayed in the element. If you do not enter a text in this field, the web address will be displayed.

- In the entry field *URL*, enter the web address (e. g. <http://www.google.de>).

7.1.7 Upload and add new image

- Click on the button .


General

Name *

Add image*(Allowed
file types: .jpg, .png, .gif) ...

Background image ☐

Fig. 66: Add image

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

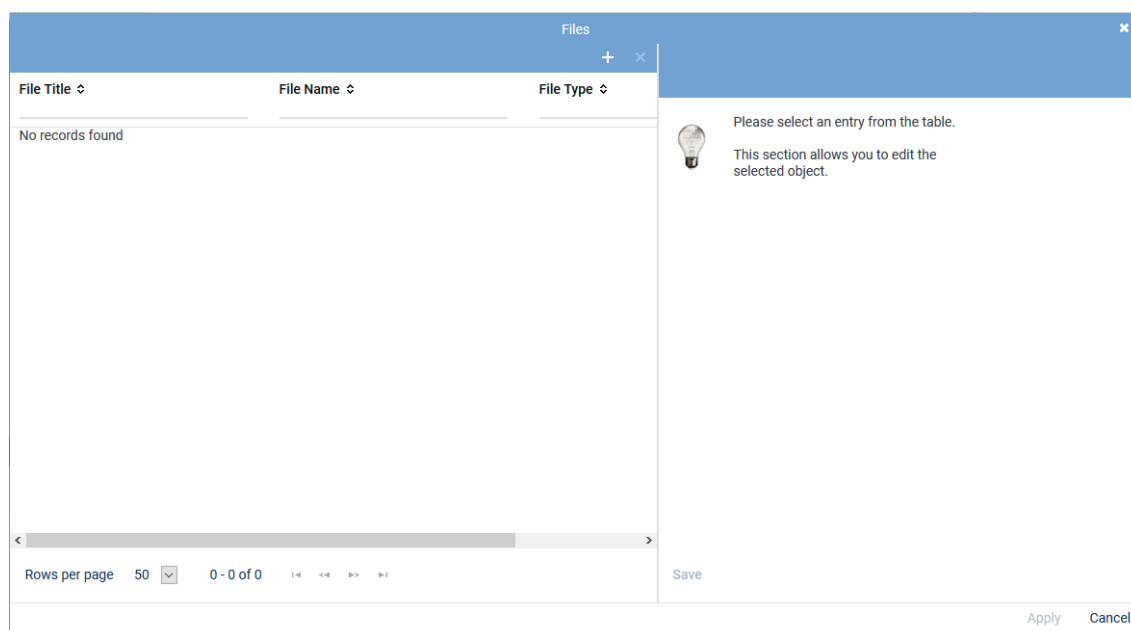


Fig. 67: Add file

- Click on the button *Upload File*.

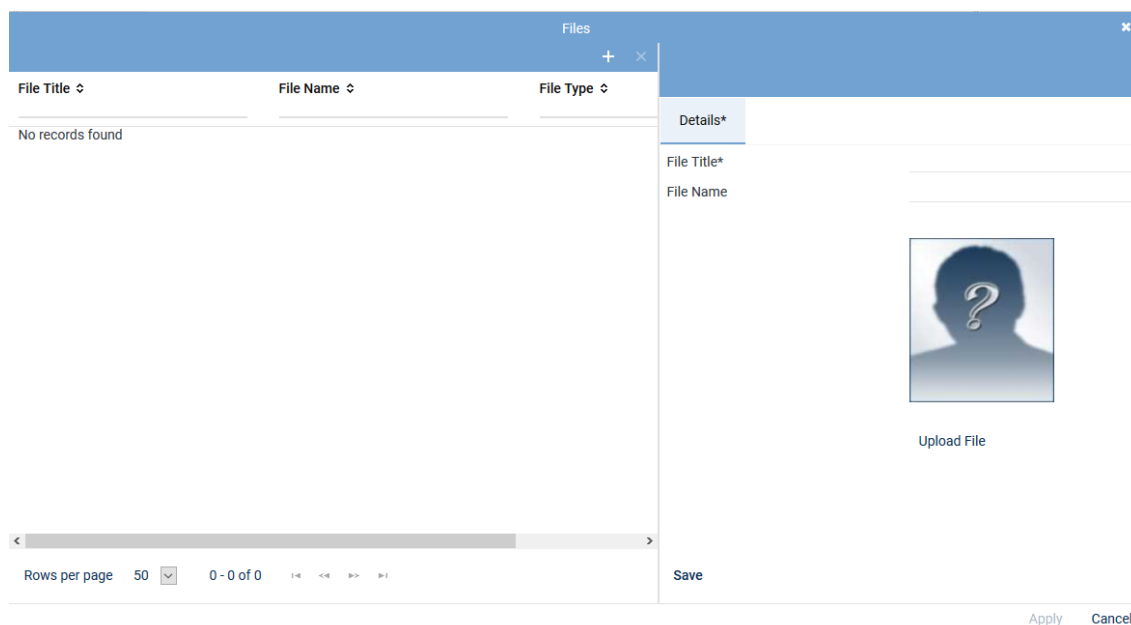


Fig. 68: Upload File

- Click on the button *Choose File*.

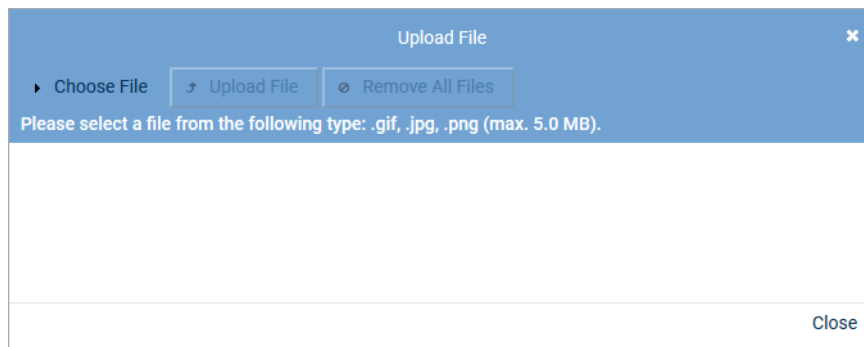


Fig. 69: Choose file

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

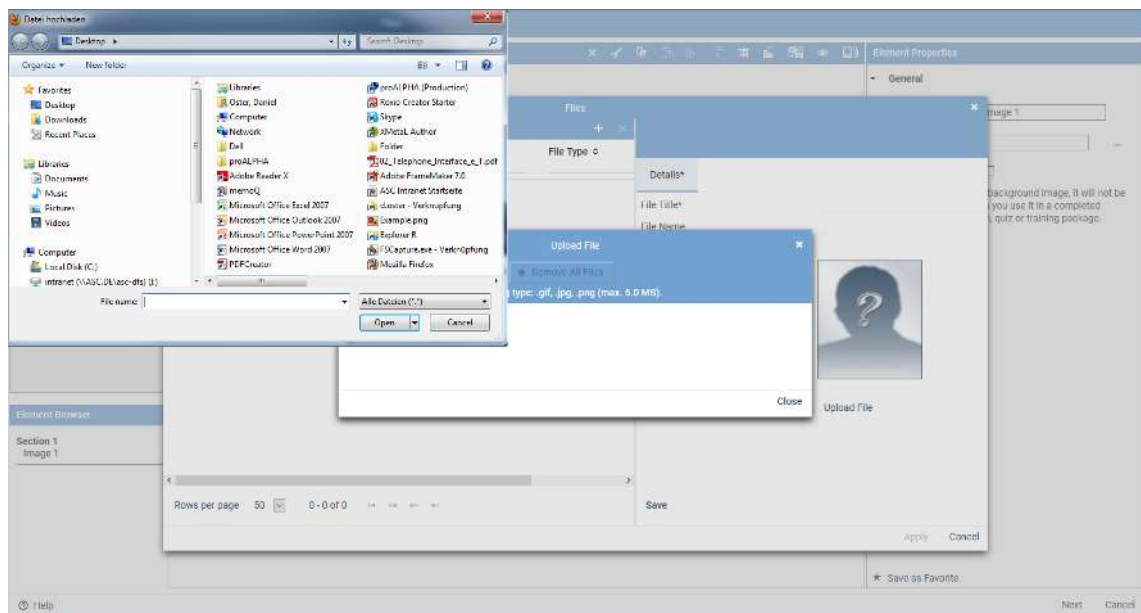




Fig. 70: Open file

- To upload the file, click on the button  (*Upload file*).
If you would like to remove the selected file and select a different file, click on the button  (*Remove file*).

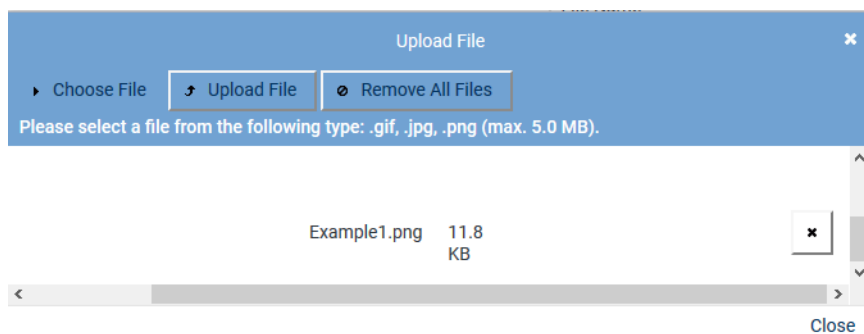
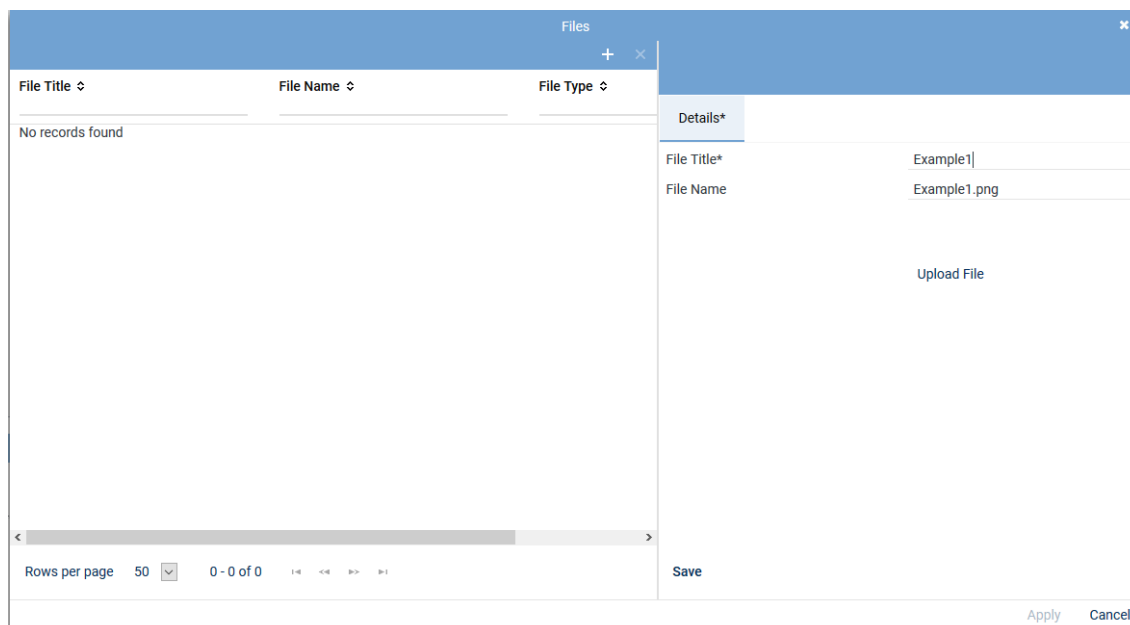


Fig. 71: Upload File

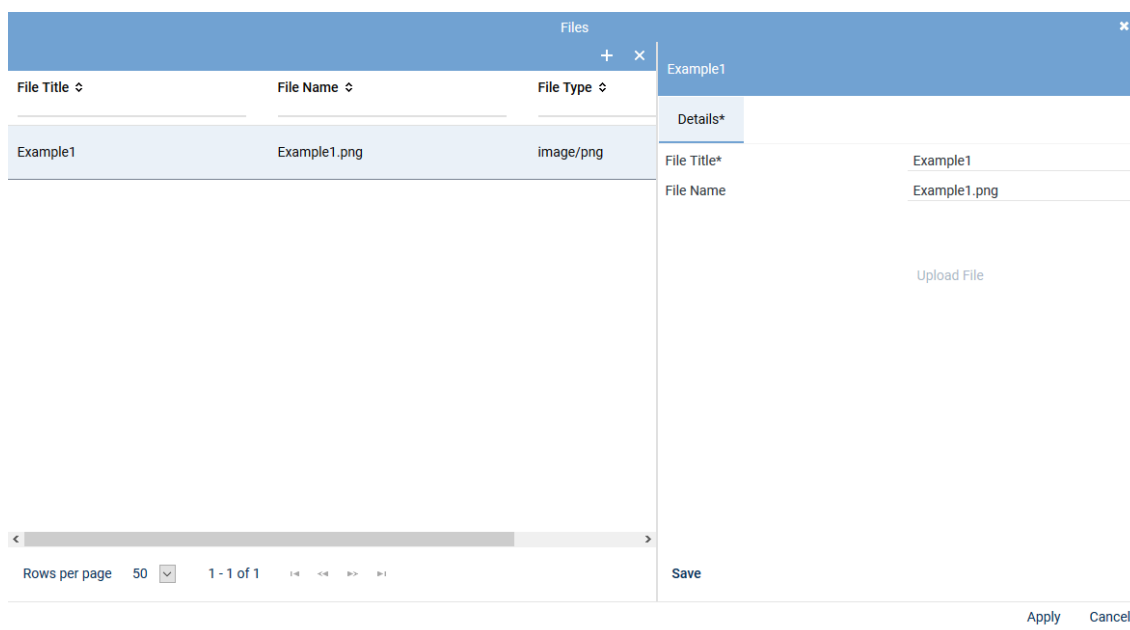
- To save the uploaded file in the file list, click on the button *Save*.



The 'Files' dialog window is shown with a blue header and a close button. The main area is a table with columns: File Title, File Name, and File Type. It displays 'No records found'. The right panel has a 'Details*' tab with fields for File Title* (Example1) and File Name (Example1.png). Below these is an 'Upload File' button. At the bottom right are 'Save', 'Apply', and 'Cancel' buttons. The bottom left shows 'Rows per page' set to 50 and '0 - 0 of 0' records.

Fig. 72: Save file in file list

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



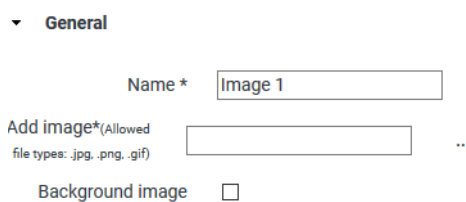
The 'Files' dialog window is shown with a blue header and a close button. The main area is a table with columns: File Title, File Name, and File Type. It displays one record: Example1, Example1.png, image/png. The right panel has a 'Details*' tab with fields for File Title* (Example1) and File Name (Example1.png). Below these is an 'Upload File' button. At the bottom right are 'Save', 'Apply', and 'Cancel' buttons. The bottom left shows 'Rows per page' set to 50 and '1 - 1 of 1' records.

Fig. 73: Apply saved image

7.1.8

Add image from the file list

- Click on the button ...



The 'General' tab is selected. The 'Name *' field contains 'Image 1'. Below it is the 'Add image*(Allowed file types: .jpg, .png, .gif)' section with a text input field and a button with three dots. A 'Background image' checkbox is also present and is currently unchecked.

Fig. 74: Add image

2. Select a file from the list and click on the button *Apply*.
To discard the selection and close the window, click on the button *Cancel*.

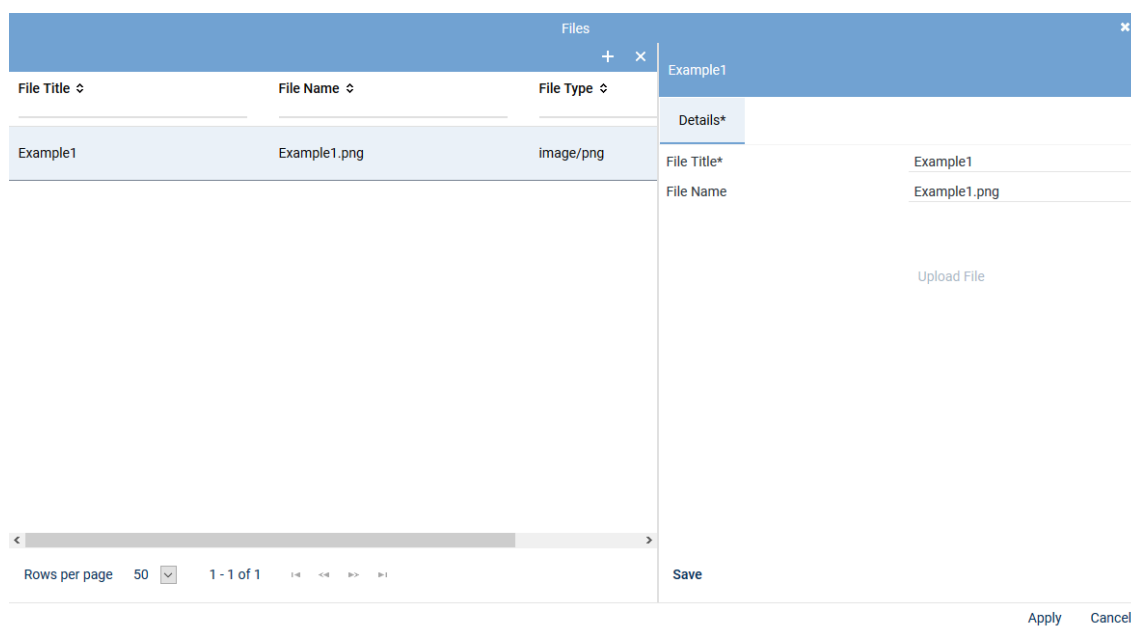


Fig. 75: Apply saved image

7.2

Attachment

The element property *Attachment* allows you to attach a file, a link or a web address.

Attachment

(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

- ☒ No attachment
☐ Add link(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

Fig. 76: Element property *Attachment* (example by reference to the element *Radio Button Question*)

Allowed file types: .txt, .pdf, .doc, .docx

Maximum file size: 5 MB

7.2.1

Upload and add new file as attachment

1. Click on the button **+** (*Add attachment*).

Attachment

(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

- ☒ No attachment
☐ Add link(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

Fig. 77: Element properties Attachment

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

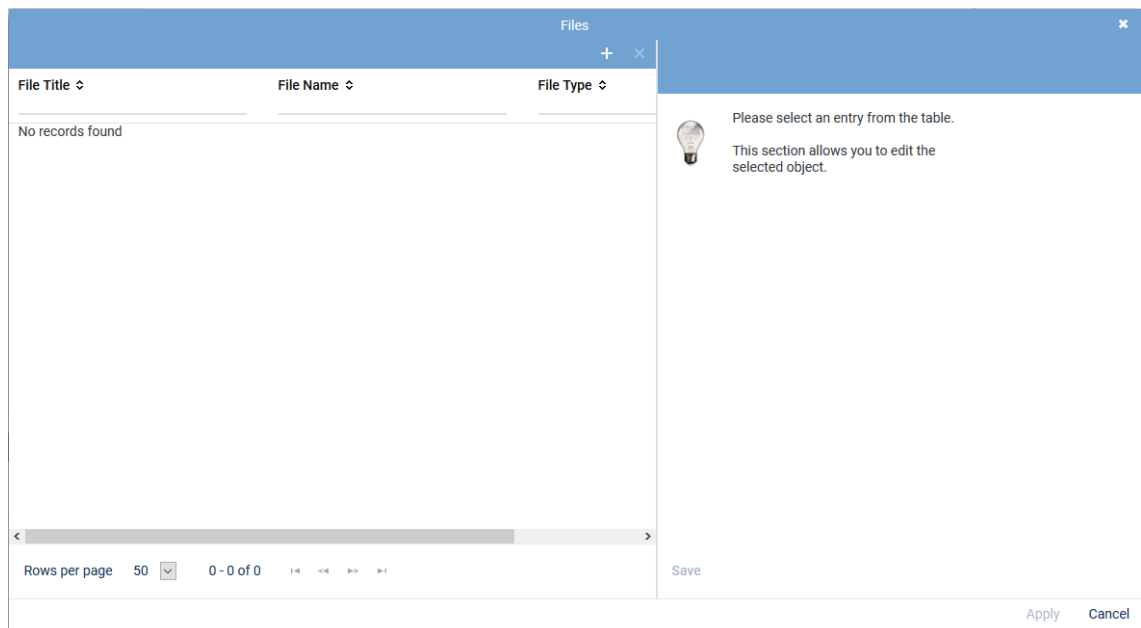


Fig. 78: Add file

- Click on the button *Upload File*.

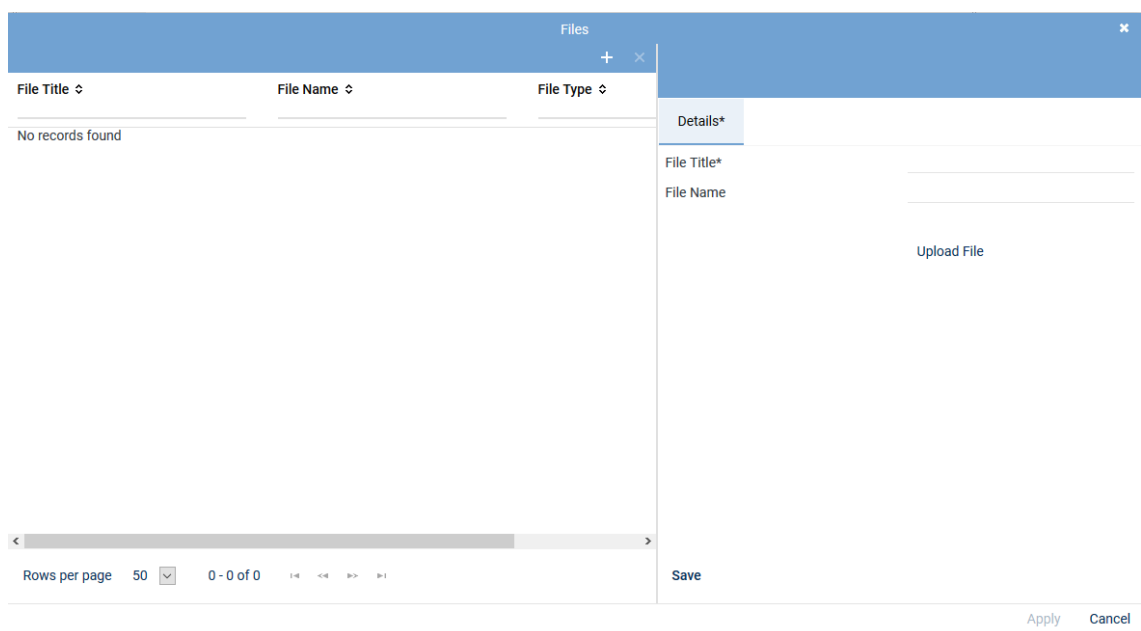


Fig. 79: Upload File

- Click on the button *Choose File*.

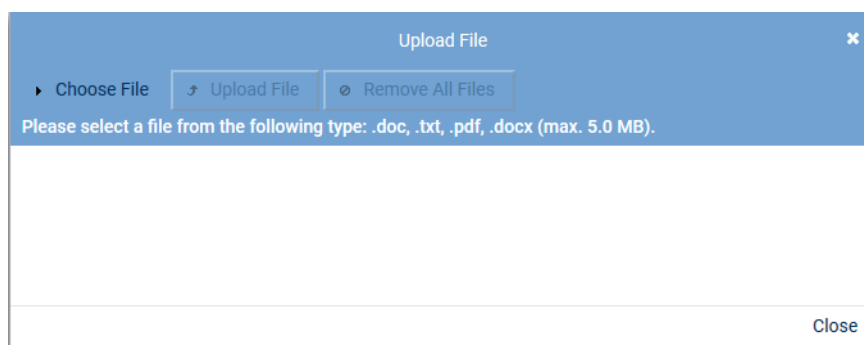


Fig. 80: Choose file

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

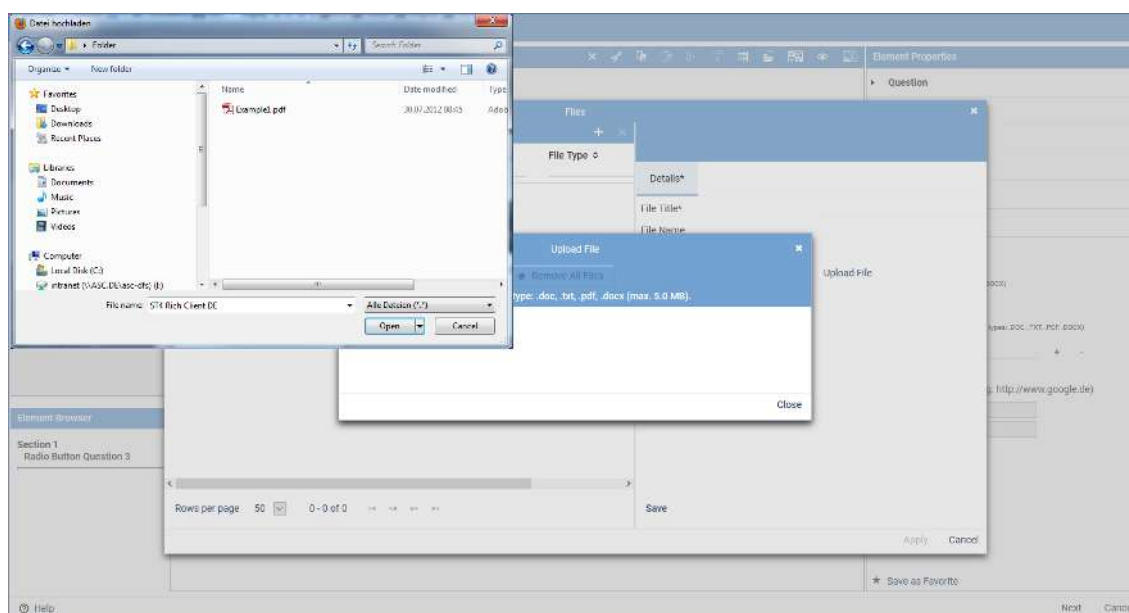




Fig. 81: Open file

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

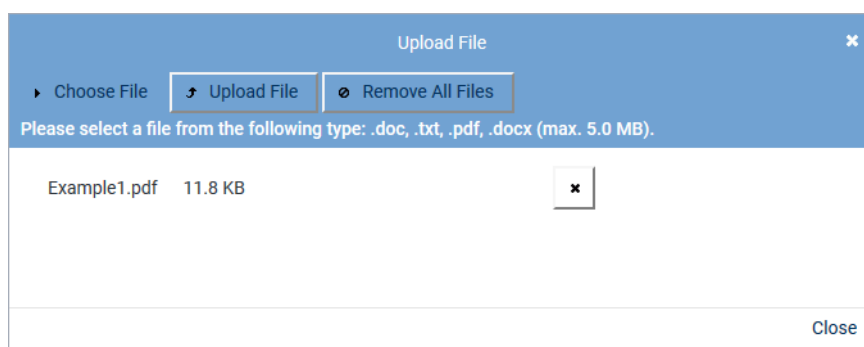
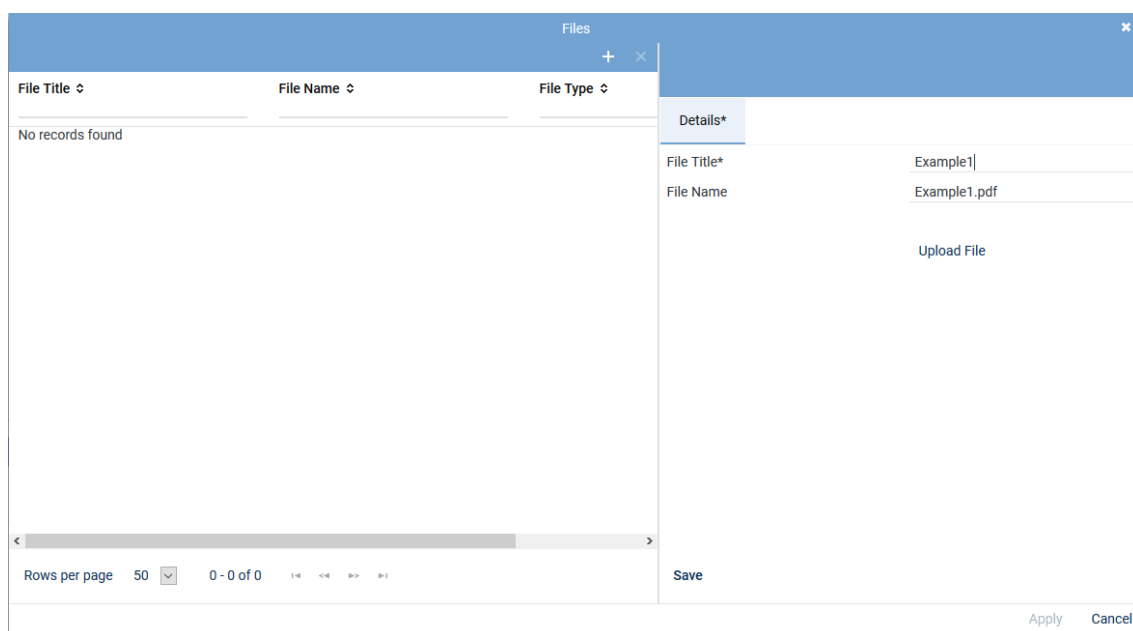


Fig. 82: Upload File

7. To save the uploaded file in the file list, click on the button *Save*.



File Title	File Name	File Type
No records found		

Details*

File Title* Example1

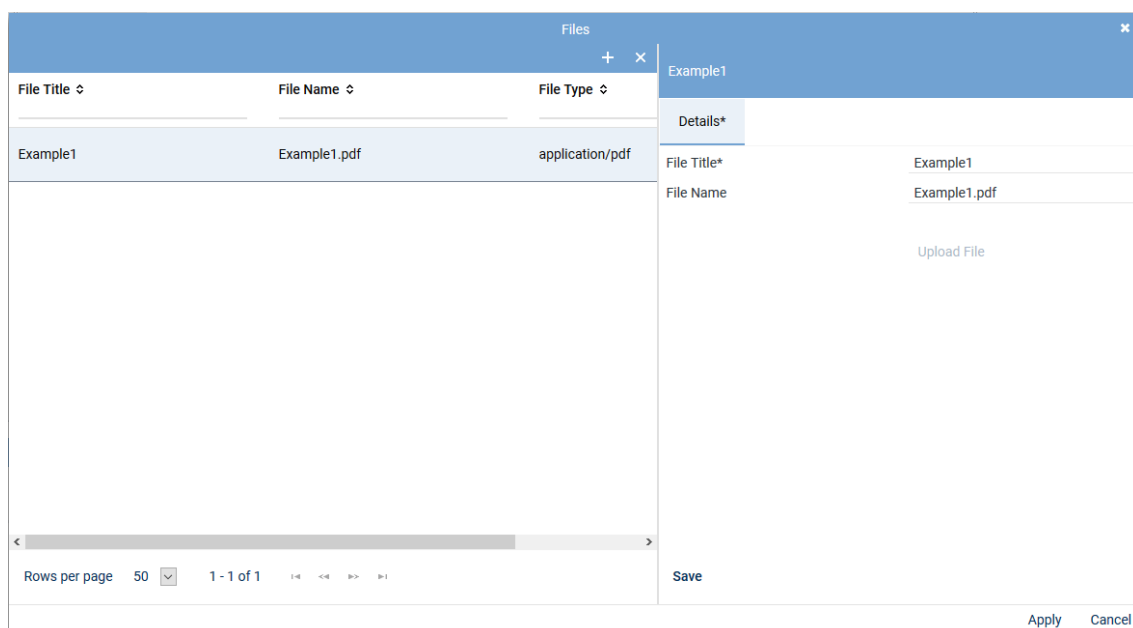
File Name Example1.pdf

Upload File

Save

Fig. 83: Save file in file list

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



File Title	File Name	File Type
Example1	Example1.pdf	application/pdf

Example1

Details*

File Title* Example1

File Name Example1.pdf

Upload File

Save

Fig. 84: Apply file to the element

The attachment appears in the element on the right side as  icon.

7.2.2 Add file from file list

- Click on the button **+** (*Add attachment*).

▼ Attachment

(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

- ☒ No attachment
☐ Add link(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

_____ + -

Fig. 85: Element properties Attachment

- Select a file from the list and click on the button *Apply*.
To discard the selection and close the window, click on the button *Cancel*.

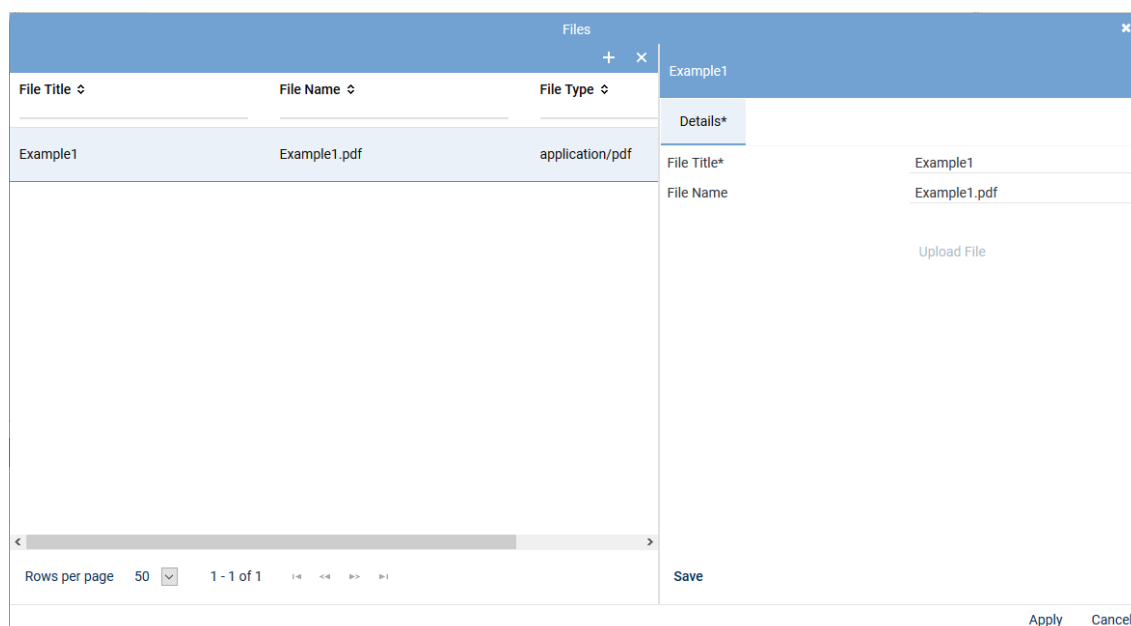


Fig. 86: Apply file from file list

The attachment appears in the element on the right side as  icon.

7.2.3 Remove file as attachment of an element

- Click on the icon  (*Remove attachment*).

▼ Attachment

(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

- ☒ No attachment
☐ Add link(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

_____ + -

Fig. 87: Element properties Attachment

7.2.4 Delete file from file list

- Click on the button  (*Add attachment*).

Attachment

(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

- ☒ No attachment
☐ Add link(Allowed file types: .DOC, .TXT, .PDF, .DOCX)

Fig. 88: Element properties Attachment

- Select the file you would like to delete and click on the icon  (*Delete*).

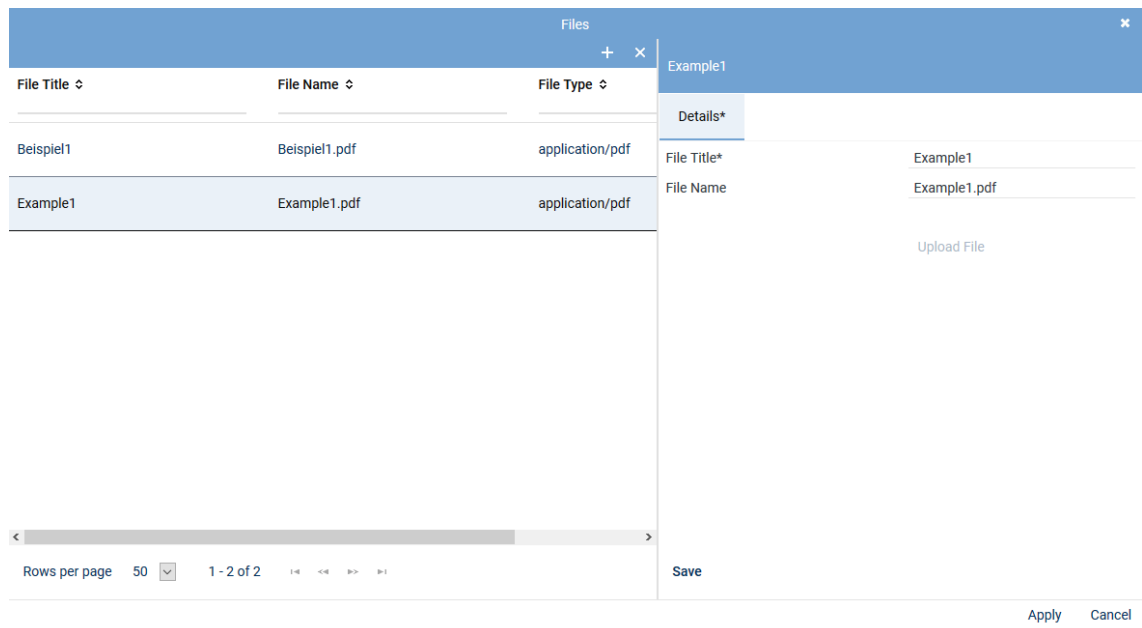



Fig. 89: Delete file



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  (*Delete*).

7.2.5 Add web address as attachment

- Activate the option *Web address*.

☒ Web address (e. g. <http://www.google.de>)

Name
 URL

Fig. 90: Add web address

- In the field *Name*, enter the name which is supposed to be displayed in the element. If you do not enter a text in this field, the web address will be displayed.
- In the entry field *URL*, enter the web address (e. g. <http://www.google.de>).

7.3 Answers

The element property *Answers* allows you to define the answers to the corresponding questions. Depending on the selected element, a certain number of answers is available by default (for the elements *Yes/No Question* and *0 - 1 Question* there are exactly 2 answers, for instance,

for the element *Remark* only 1); for other elements such as *Multiple Choice Question* you can add additional answers. For some elements a score for the answer can be entered or you can define whether the answer is the correct one or a default answer.

▼ **Answers**







Text	Value	Default	Edit
Excellent	100	<input type="checkbox"/>	
Good	80	<input type="checkbox"/>	
Average	60	<input type="checkbox"/>	
Sufficient	40	<input type="checkbox"/>	
Bad	0	<input type="checkbox"/>	
		Add	Remove

Fig. 91: Element property *Answers* (example by reference to the element *Multiple Choice Question*)

By clicking on the button *Add*, you can add any number of additional answers, see [chapter "Add answer", p. 48](#).



By clicking on the button *Delete*, you can delete a selected answer, see [chapter "Delete answer", p. 48](#). 1 answer always has to remain.

1. To adjust an existing answer individually, click on the icon  (*Edit*), see [chapter "Edit answer", p. 47](#).

Text	Enter the answer text. For the element <i>0 - 1 Question</i> enter a number smaller than or equal 1; for the element <i>0 - 9 Question</i> enter a number smaller than or equal 9. A number which has already been used cannot be used again.
Correct Answer	Define whether the answer is correct or not. <input checked="" type="checkbox"/> = Answer is correct. <input type="checkbox"/> = Answer is not correct. You can mark several answers as correct.
Value	Enter the score for the answer. You can enter a value from 0 to 100 for the number of points. The values of the default answers depend on the rating scheme and on the element you are editing.
Default	Select whether the answer is to be preselected as default answer. <input checked="" type="checkbox"/> = Answer is displayed as default answer. <input type="checkbox"/> = Answer is not displayed as default answer.


In order to obtain precise results, we recommend setting the highest possible answer value for an evaluation element to 100. In other words: We recommend to define a value of 100 for the answers *Excellent* and *Yes*.

The answers may have different values, but the evaluation will not reach a score of 100 then, even though the evaluation has been classified with the highest possible score. This can occur for example, if a correct answer is not assigned the value 100.

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

7.3.1

Edit answer

1. To change the text *New answer*, click on the icon  (*Edit*).
2. Enter an answer in the entry field of the column *Text*.

▼ **Answers**

Text	Value	Default	Edit
Excellent	100	<input type="checkbox"/>	✓ ✕
Good	80	<input type="checkbox"/>	
Average	60	<input type="checkbox"/>	
Sufficient	40	<input type="checkbox"/>	
Bad	0	<input type="checkbox"/>	
Add Remove			

Fig. 92: Edit answer (example by reference to the element *Multiple Choice Question*)

- If this is a correct answer, activate the check box *Correct Answer*.
If the answer is not correct, deactivate the check box *Correct Answer*.
- To save the changes, click on the icon ✓ (Save).
To discard the changes, click on the icon ✕ (Discard).

7.3.2

Add answer

- Click on the button *Add*.

▼ **Answers**







Text	Value	Default	Edit
Excellent	100	<input type="checkbox"/>	
Good	80	<input type="checkbox"/>	
Average	60	<input type="checkbox"/>	
Sufficient	40	<input type="checkbox"/>	
Bad	0	<input type="checkbox"/>	
Add Remove			

Fig. 93: Add answer (example by reference to the element *Multiple Choice Question*)

- To change the text *New answer*, click on the icon  (Edit).
- Enter an answer in the entry field of the column *Text*.

▼ **Answers**

Text	Value	Default	Edit
Excellent	100	<input type="checkbox"/>	✓ ✕
Good	80	<input type="checkbox"/>	
Average	60	<input type="checkbox"/>	
Sufficient	40	<input type="checkbox"/>	
Bad	0	<input type="checkbox"/>	
Add Remove			

Fig. 94: Edit answer (example by reference to the element *Multiple Choice Question*)

- If this is a correct answer, activate the check box *Correct Answer*.
If the answer is not correct, deactivate the check box *Correct Answer*.
- To save the changes, click on the icon ✓ (Save).
To discard the changes, click on the icon ✕ (Discard).

7.3.3

Delete answer

- Select the answer you would like to delete and click on the button *Delete*.






▼ Answers			
Text	Value	Default	Edit
Excellent	100	<input type="checkbox"/>	
Good	80	<input type="checkbox"/>	
Average	60	<input type="checkbox"/>	
Sufficient	40	<input type="checkbox"/>	
Bad	0	<input type="checkbox"/>	
		Add	Remove

Fig. 95: Delete answer (example by reference to the element *Multiple Choice Question*)

7.4

Description

The element property *Description* allows you to enter a description for selected element.

▼ Description

Description

Fig. 96: Element property *Description* (example by reference to the element *Link*)

Description Enter a description here which is supposed to be displayed with the link.

7.5

Question

The element property *Question* allows you to enter the text of the question, enter a severity as well as define whether the question is supposed to be a mandatory one or critical for the complete template, for one section or for a question group.

▼ Question

Text *
(Maximum 400 characters)

Severity *

Mandatory question ☐

Critical ☒

Critical for:

Complete template ☒

Section ☐

Question group ☐

Fig. 97: Element property *Question* (example by reference to the element *Combo Box Question*)

Depending on the element you are editing, the following individual settings can be configured:

Text	Text field for the question text. Enter the question.
Severity	<p>This field allows you to define the importance which is given to the corresponding question during the evaluation. For the severity, you can enter a value from 0 to 100. The value 0 is used for additional questions which are not evaluated.</p> <p>The severity of all elements in a section has to amount to 100 in total or every element has a severity of 100 or 0.</p>
Mandatory question	<p>Define whether the question is mandatory or not.</p> <p><input checked="" type="checkbox"/> = The question has to be answered.</p> <p><input type="checkbox"/> = The question does not have to be answered.</p>

Critical

Define whether the inserted question is supposed to be a critical question within a complete template, a section or a question group. If it is a critical question, a negative evaluation will cause the complete template, the section or the question group, depending on the previous selection, to receive a score of 0.

☐ = The question is not critical.

☒ = The question is critical.

If this is a critical question, one of the following options has to be selected:

- *Critical for: Complete template*
- *Critical for: Section*
- *Critical for: Question group*

7.6**Questions**

Add elements from the template to the question group or remove elements from the question group. You can only add elements of the current section.

7.6.1**Add questions**

1. Click on the button *Add*.

▼ **Questions**

Name

No records found

Add

Remove

Fig. 98: Element property *Questions*

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

Choose Question(s) ✕	
Name	Question Text
Radio Button Question 1	Change the question text in the element properties.
Radio Button Question 2	Change the question text in the element properties.
Yes/No Question 3	Change the question text in the element properties.
<div>Add Close</div>	

Fig. 99: Select elements

3. To add the selected elements to the question group, click on the button *Add*.
To discard the selection and close the window, click on the button *Close*.

Choose Question(s)	
Name	Question Text
Radio Button Question 1	Change the question text in the element properties.
Radio Button Question 2	Change the question text in the element properties.
Yes/No Question 3	Change the question text in the element properties.

Add Close

Fig. 100: Add elements

7.6.2 Remove question assignment

- Click on the line with the question you would like to remove from the question group.

▼ Questions

Name
Radio Button Question 1
Radio Button Question 2
Yes/No Question 3

Add Remove

Fig. 101: Remove question assignment

- Click on the button *Remove*.

7.7 Question Group

The element property *Question Group* allows you to select the question group that the element is supposed to be assigned to.

▼ Question Group

Insert question group No selection ▼

Fig. 102: Element property *Question group* (example by reference to the element *Yes/No Question*)

- To assign a question group, select a question group from the drop-down list.



In the drop-down list, only those question groups are available which have been defined for the section, see [chapter "Element Question Group", p. 22](#). Questions of different sections cannot be comprised in one question group.

7.8 Content

The element property *Content* allows you to define the text and the severity of the question group.

▼ Content

Text *	Question Group
Severity *	100

Fig. 103: Element property *Content* (example by reference to the element *Question Group*)

<i>Text</i>	Text field for the question group. This text is displayed in the element in the template.
<i>Severity</i>	<p>This field allows you to define the importance which is given to the corresponding question group during the evaluation. For the severity, you can enter a value from 0 to 100. The value 0 is used for additional questions which are not evaluated.</p> <p>The severity of all elements in a section has to amount to 100 in total or every element has a severity of 100 or 0.</p>

7.9

Categories

Here, you select the category you would like to assign the question to. You can assign more than 1 category to the question.

Example: In the context of a customer survey, there may be questions regarding the agent and general questions about the product. You can treat the agent-relevant questions and not-agent-relevant questions differently in the summary, by assigning them to different categories. Questions and possible negative evaluations which may not be imputed on the agent can thus remain unconsidered during the evaluation.

7.9.1

Create and add new category

1. Click on the icon  (*Add*).



Fig. 104: Element property *Categories*

2. Click on the icon  (*Create new category*).

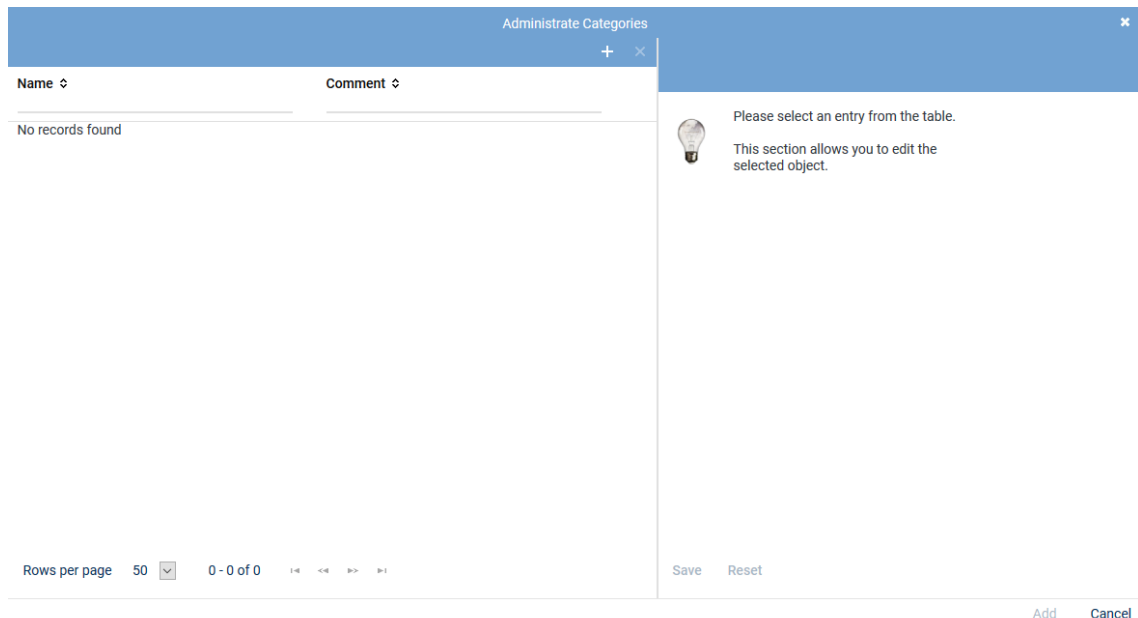
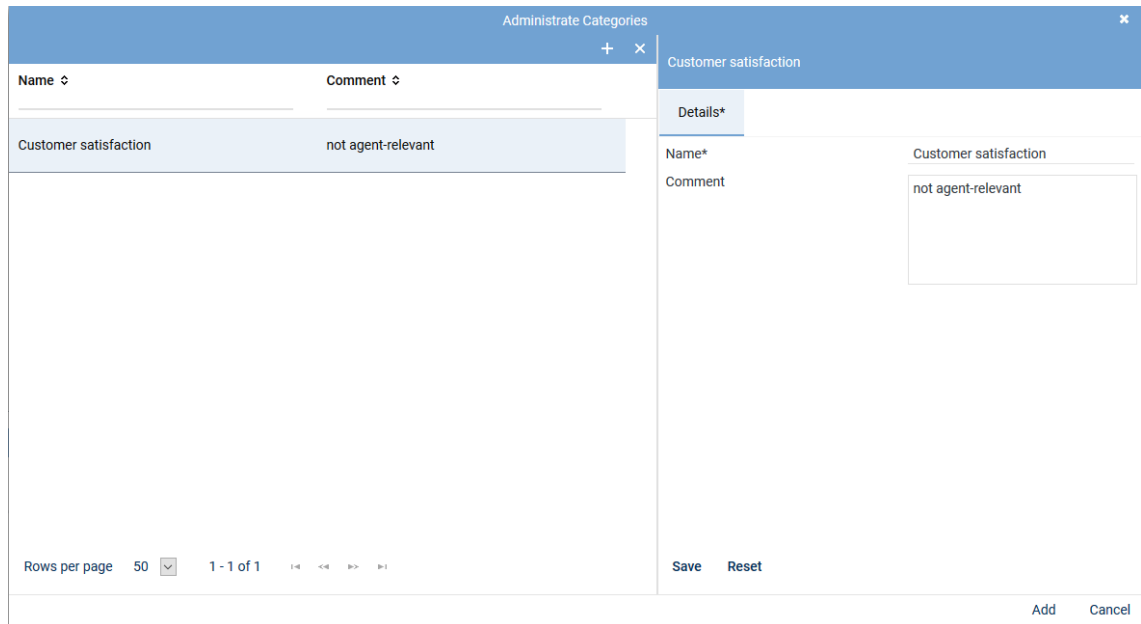


Fig. 105: Create new category

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




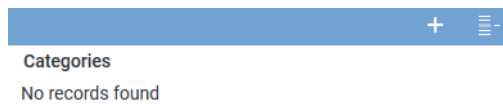
The screenshot shows a web application window titled "Administrate Categories". It features a table with two columns: "Name" and "Comment". The table contains one row with the value "Customer satisfaction" in the "Name" column and "not agent-relevant" in the "Comment" column. Below the table, there are pagination controls showing "Rows per page: 50" and "1 - 1 of 1". To the right of the table is a "Details*" panel with input fields for "Name*" and "Comment", both containing the same data as the table. At the bottom of the window, there are buttons for "Save", "Reset", "Add", and "Cancel".

Fig. 106: New category saved

4. If required, enter a comment for the category in the entry field *Comment*.
5. To save the category, click on the button *Save*.
To discard the changes, click on the button *Reset*.
6. To apply the category for the element, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.

7.9.2 Assign existing category

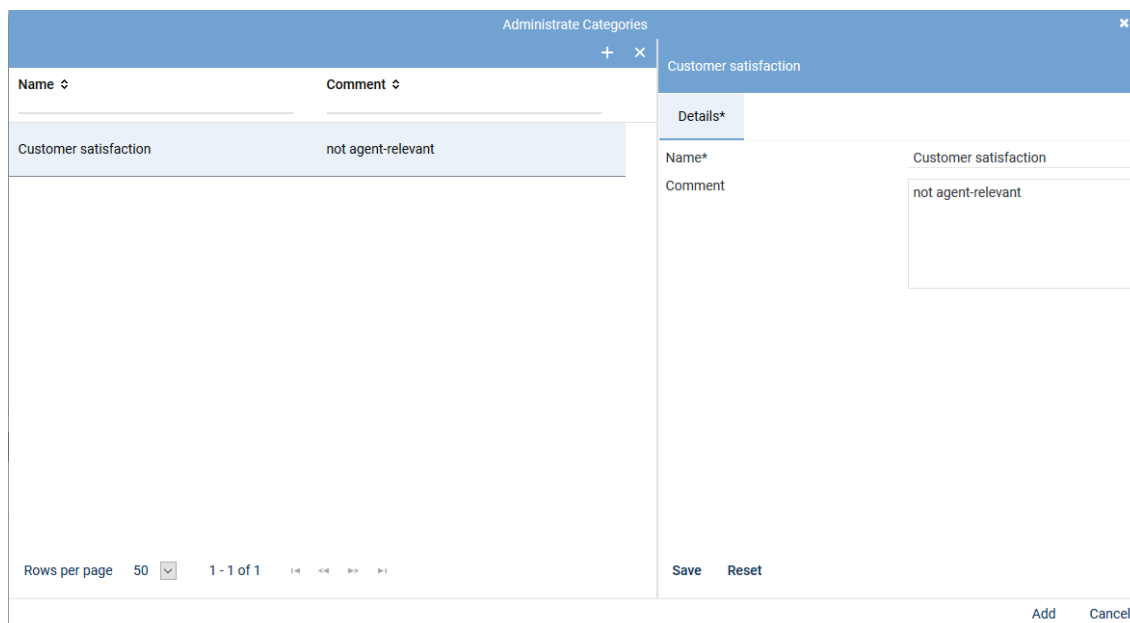
1. Click on the icon  (*Add*).



The screenshot shows a blue header bar with a "+" icon and a list icon. Below it, the text "Categories" is displayed, followed by "No records found".

Fig. 107: Element property *Categories*

2. Select a category from the list.



The screenshot shows a window titled "Administrate Categories" with a close button (X) in the top right corner. The window is divided into two main sections. The left section contains a table with two columns: "Name" and "Comment". The table has one row with the values "Customer satisfaction" and "not agent-relevant". Below the table, there is a pagination control showing "Rows per page" set to 50, "1 - 1 of 1", and navigation arrows. The right section is titled "Customer satisfaction" and contains a "Details*" tab. Under this tab, there are two input fields: "Name*" and "Comment". The "Name*" field contains the text "Customer satisfaction" and the "Comment" field contains the text "not agent-relevant". At the bottom of the right section, there are "Save" and "Reset" buttons. At the bottom right of the window, there are "Add" and "Cancel" buttons.

Fig. 108: Select category from the list of categories

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

7.9.3

Delete category

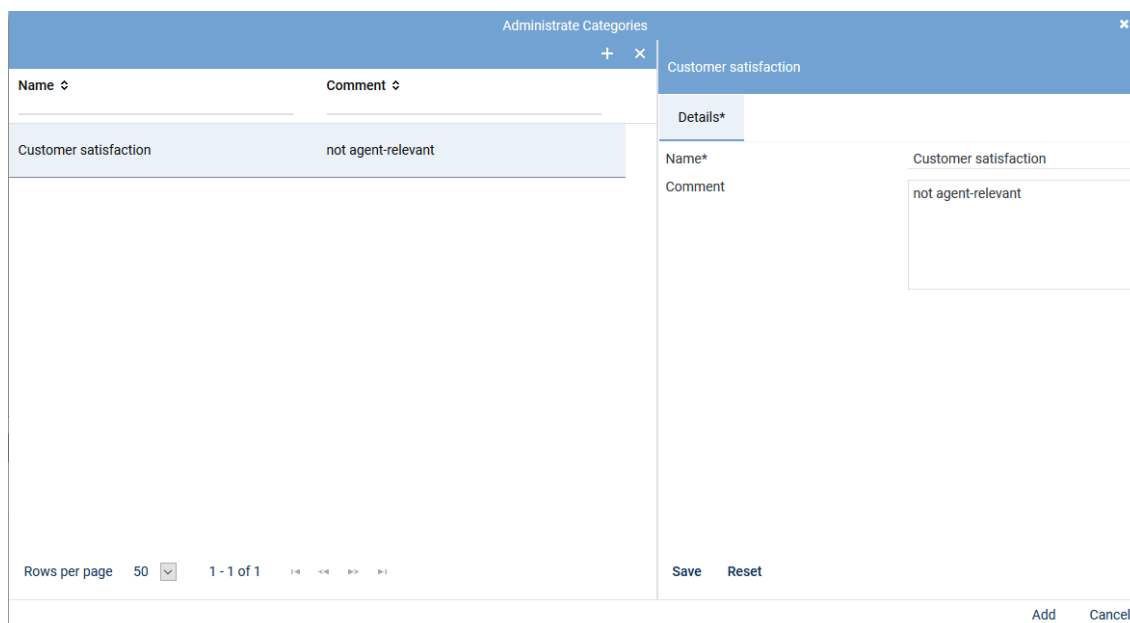
- Click on the icon  (*Add*).



The screenshot shows a blue header bar with a "+" icon and a menu icon. Below the header, the text "Categories" is displayed, followed by "No records found".

Fig. 109: Element property *Categories*

- From the list, select the category you would like to delete and click on the icon  (*Delete*).



This screenshot is identical to the one in Fig. 108, showing the "Administrate Categories" window with the "Customer satisfaction" category selected and its details displayed in the right panel.

Fig. 110: Delete category

- To really delete the category, confirm the security prompt.

7.9.4 Remove category assignment

1. Select the category you would like to remove and click on the button  (Remove).



Fig. 111: Remove category

7.10 Layout

The element property *Layout* allows you to define the appearance of the element.

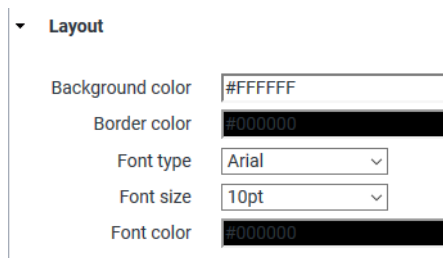


Fig. 112: Element property *Layout* (example by reference to the element *Remark*)

Depending on the element you are editing, the following individual settings can be configured:

<i>Background color</i>	Here, you can define the background color of the element.
<i>Border color</i>	Here, you can define the border color of the element.
<i>Font type</i>	Here, you can set the font type. To do so, click on the arrow key behind the entry field and select the font type in the drop-down list.
<i>Font size</i>	Here, you can set the font size. To do so, click on the arrow key behind the entry field and select the font size in the drop-down list.
<i>Font color</i>	Here, you can define the font color of the element.
<i>Show answers below the question</i>	<p>Here, you can select whether the answers are supposed to be displayed below the question.</p> <p><input checked="" type="checkbox"/> = Answers are displayed.</p> <p><input type="checkbox"/> = Answers are not displayed.</p>

For information about how to change the colors in the respective elements see [chapter "Change color", p. 55](#).


7.10.1 Change color

To change the background color, the border color or the font color of a respective element, click on the corresponding entry field behind the color.

1. You have 2 options to select a color:
 - Enter the RGB value
 - Select color from the color palette



Fig. 113: Define color

- To apply the color, click on the icon  (*Apply selected color*).
To cancel the process and close the window, click on the working area.

7.10.2

Change the display area of the answer

- To show the answers below the question, activate the check box *Show answers below the question*.

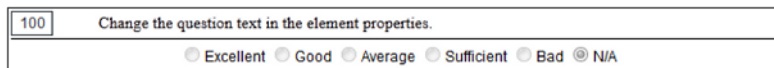



Fig. 114: Show answers below the question - activated

- To show the answers on the right side of the question, deactivate the check box *Show answers below the question*.

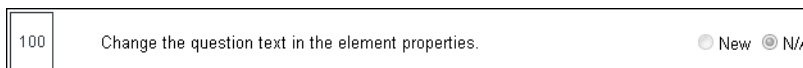



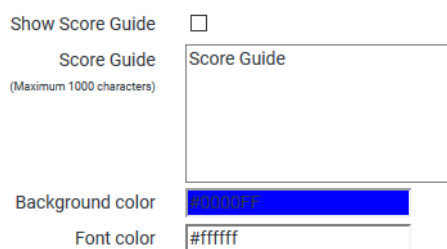
Fig. 115: Show answers below the question - deactivated


7.11

Score Guide

The element property *Score Guide* allows you to define the guidelines to evaluate the question. Describe for example which criteria will lead to a positive or negative answer.

▼ Score Guide


Fig. 116: Element property *Score Guide* (example by reference to the element *Radio Button Question*)

Show Score Guide	Define whether a score guide is supposed to be added to the question. <input checked="" type="checkbox"/> = Score guide is added. <input type="checkbox"/> = Score guide is not added. In the template, the score guide is displayed by the icon  . The user can open the score guide and show its content by clicking on this icon.
Score Guide	In this text field, you define the description of the guidelines for the evaluation of the question.

<i>Background color</i>	In this field, you can configure the background color (see chapter "Change color", p. 55).
<i>Font color</i>	In this field, you can configure the font color (see chapter "Change color", p. 55).

7.12

Text

The element property *Text* allows you to enter a text with general information which is supposed to be displayed in the template or to define a question that the participant of a customer survey is supposed to answer.

▼ **Text**

Text *
(Maximum 200 characters)

Comment

Default text
(Maximum 2000 characters)

Fig. 117: Element property *Text* (example by reference to the element *Comment*)

Depending on the element you are editing, the following individual settings can be configured:

<i>Text</i>	Enter the question for the customer comment or the informative text for the template.
<i>Default text</i>	Enter a text which is supposed to be displayed in the comment field (e. g. the prompt to enter a comment). This text can be overwritten and edited during the evaluation.

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