

INSPIRATION^{neo} for Compliance

Activities module



User manual

5/30/2022

Product line Neo, version 7.x

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

INSPIRATION^{neo} for Compliance

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

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1 General information

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2 Introduction

2 Introduction

The Activities module offers users the possibility to search for and replay recorded activities. As a definition, activities are recorded calls with recorded screen activities or mere call recordings.

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



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



You need an up-to-date JAVA version for the icon to replay activities.

3

Main view

In the main view, all saved activities are displayed.

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



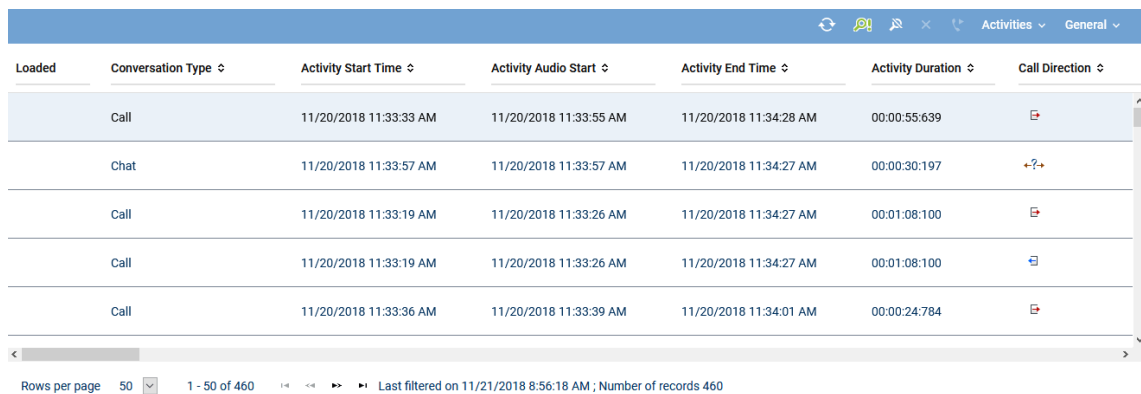
If you would like to configure this default search filter, refer to the administration manual *Administration guideline* for information.






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

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



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









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

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

Fig. 1: Main view - activities (example)

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

Information about the activity	
<i>Activity Start Time</i>	Shows the start time of the activity.
<i>Activity Data Start</i>	Shows the start time of the data section of the activity.
<i>Activity End Time</i>	Shows the end time of the activity.
<i>Activity Duration</i>	Shows the duration of the activity.
<i>Conversation Direction</i>	Conversation direction of the activity. <ul style="list-style-type: none"> <i>Internal</i> <i>Unknown</i>
<i>Call direction</i>	Call direction der activity. <ul style="list-style-type: none">  = incoming  = outgoing  = transferred  = unknown
<i>Kept Activity</i>	Shows whether this is a kept activity: <ul style="list-style-type: none">  = kept  = not kept
<i>Loaded</i>	Shows whether the activity has been loaded in the Replay module. <ul style="list-style-type: none"> <input type="checkbox"/> = activity has not been loaded.

	 = activity has been loaded. <p>The loaded activity is assigned a color from a defined color palette. The order of the colors has been predetermined. If all colors of a palette have been used in several loaded activities, the color assignment start over again. In the Replay module, the loaded activity is displayed in the same color.</p>
<i>Activity ID</i>	Displays the activity ID.
<i>Activity transfers</i>	Number of activity transfers:
<i>Creation Date</i>	Shows the date on which the activity was created.
<i>Transcribed</i>	Shows whether there are transcriptions for the activity.
<i>Updated</i>	Shows the date on which the activity was updated for the last time.
Conversation information	
<i>Conversation Type</i>	<p>Displays the type of the conversation.</p> <p>Call = call/video call</p> <p>Work item = work item (screen)</p> <p>Call and screen recording = call and screen</p> <p>Text = SMS/SDS</p> <p>Chat = chat</p>
<i>Conversation Start Time</i>	Shows the start time of the conversation.
<i>Conversation Data Start</i>	Shows the start time of the data section of the conversation.
<i>Conversation End Time</i>	Shows the end time of the conversation.
<i>Conversation Duration</i>	Shows the duration of the conversation.
<i>Conversation ID</i>	Shows the conversation ID.
<i>Conversation ID of Consultation Initiator</i>	If this conversation arose from a consultation within another conversation, this field displays the conversation ID of the original conversation.
Calling party information	
<i>Calling Party Name</i>	Shows the name of the calling party.
<i>Calling Party PBX Agent ID</i>	Shows the PBX agent ID of the calling party.
<i>Calling Party Phone Number</i>	Shows the phone number of the calling party.
Called Party Information	
<i>Called Party Name</i>	Shows the name of the called party.
<i>Called Party PBX Agent ID</i>	Shows the PBX agent ID of the called party.
<i>Called Party Phone Number</i>	Shows the phone number of the called party.
1st-connected participant information	
<i>1st-Connected Name</i>	Shows the name of the 1st-connected participant.
<i>1st-Connected PBX Agent ID</i>	Shows the PBX Agent ID of the 1st-connected participant.
<i>1st-Connected Phone Number</i>	Shows the phone number of the 1st-connected participant.
Information about the chat	

<i>Subject</i>	Shows the subject of the chat.
Statistics of the conversation	
<i>Number of Ringing Sections</i>	Shows the number of ringing sections.
<i>Duration of Ringing Sections</i>	Shows the duration of the ringing sections.
<i>Number of Hold Sections</i>	Shows the number of hold sections.
<i>Duration of Hold Sections</i>	Shows the duration of the hold sections.
<i>Number of Connected Sections</i>	Shows the number of connected sections.
<i>Duration of Connected Sections</i>	Shows the duration of the connected sections.
<i>Number of Failed Consultations</i>	Shows the number of failed consultations.
<i>Number of Successful Consultations</i>	Shows the number of successful consultations.
General	
<i>Trader</i>	Name of the trader who is the subject of the activity. If several traders participate in a call, a activity is created for each trader.
<i>Hold Time</i>	Shows how long the activity was on hold.
<i>Comment</i>	Shows the comments about the activity in text.
<i>Customer ID</i>	Shows the customer ID. The customer ID can be used to view and administrate a coherent customer history.
<i>Wrap-up Time</i>	Time required for post-editing.
<i>Transaction ID</i>	Shows the transaction ID. The transaction ID can be used to view and administrate a coherent transaction history.



In addition, the Additional Data module of the System Configuration displays configured and available additional data in a separate column.





3.1




Toolbar

The toolbar offers the following functions:



Fig. 2: Toolbar Activities module

	Refresh	Refreshes the main view.
	Search	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see chapter "Search", p. 10 . When opening the module, a search filter is set automatically so that only data sets of the last 14 days are displayed by default. The function by means of the icon  (<i>Reset search</i>) does not deactivate this filter! The icon  (<i>Search</i>) is displayed whenever the search has been adjusted by means of a filter.



	<i>Reset search</i>	Resets all manually entered search criteria. The search is started without manual filter settings.
	<i>Delete activity</i>	Deletes the selected activity. All activities which have been saved in the database using the function <i>Keep Activity</i> must be released for deletion using the function <i>Remove Activity</i> before being able to delete them.
	<i>Load</i>	Loads the selected activity into the Replay module to be replayed. See chapter "Load activity", p. 52 . For information about the functions of the Replay module see chapter "Replay module", p. 22 .
<i>Activities</i>	<i>Keep activity</i>	Saves the selected activity in the database. The retention time is 100 years.
	<i>Remove activity</i>	The activity is released for regular deletion. See chapter "Release activity for regular deletion", p. 42 .
	<i>Administrate Categories</i>	Here, you can administrate categories and add keywords to the categories. See chapter "Administrate categories", p. 43 .
	<i>Export</i>	Exports the selected activity. See chapter "Export activity", p. 53 .
	<i>Logical Keyword Search</i>	Here, you can start the logical keyword search. See chapter "Logical Keyword Search", p. 55 NOTICE! This function is only available if the speech analysis software has been installed and licensed.
	<i>Full-Text Search</i>	Here, you can start a full-text search. See chapter "Full-Text Search", p. 57 . NOTICE! This function is only available if the speech analysis software has been installed and licensed.
<i>General</i>	<i>Print</i>	Prints the table of the main view.
	<i>Adjust Table</i>	Opens a window where 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>	By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened.
	<i>Module Help</i>	By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened.



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

3.1.1 Search

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

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

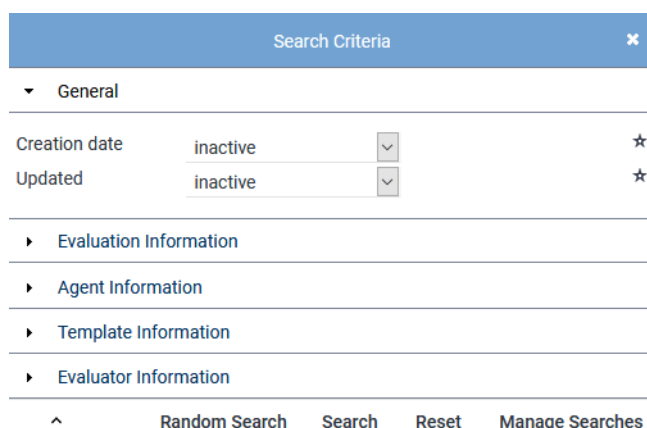



Fig. 3: Window Search Criteria (example)

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



<i>Search</i>	The main view displays all data sets which meet the entered search criteria.
<i>Random Search</i>	The main view displays up to 50 data sets selected randomly which meet the entered search criteria.



Whether and how many randomly selected data sets are displayed depends on the settings in the System Configuration. If changes in the settings of the random search are required, contact your system administrator.

5. To display all original sets of data in the main view again, i. e. to reset the manually entered search criteria, click on the icon  (*Reset search*) in the toolbar.

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

By clicking on the icon , you can tag the search criterion as favorite. Criteria tagged as favorite are displayed additionally in the upper area of the window *Search Criteria* and marked with the icon .



If conversation rules (view filters) apply for the logged-in user, then predefined search settings are displayed in the search criteria of the following modules which comply with the filter settings of the conversation rules:

- Activities module
- Compliance Analysis module

You cannot delete these user-specific filter or search settings but it is possible to add criteria to filter the elements displayed in the main view.



A detailed description of the search function can be found in the user manual *INSPIRATIONneo for Compliance - General information*.

3.1.1.1

Search criteria related to compliance analysis



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

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

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



For information about the Compliance Analysis module refer to the user manual *INSPIRATION\$neo\$ for Compliance - usage Compliance Analysis module*.

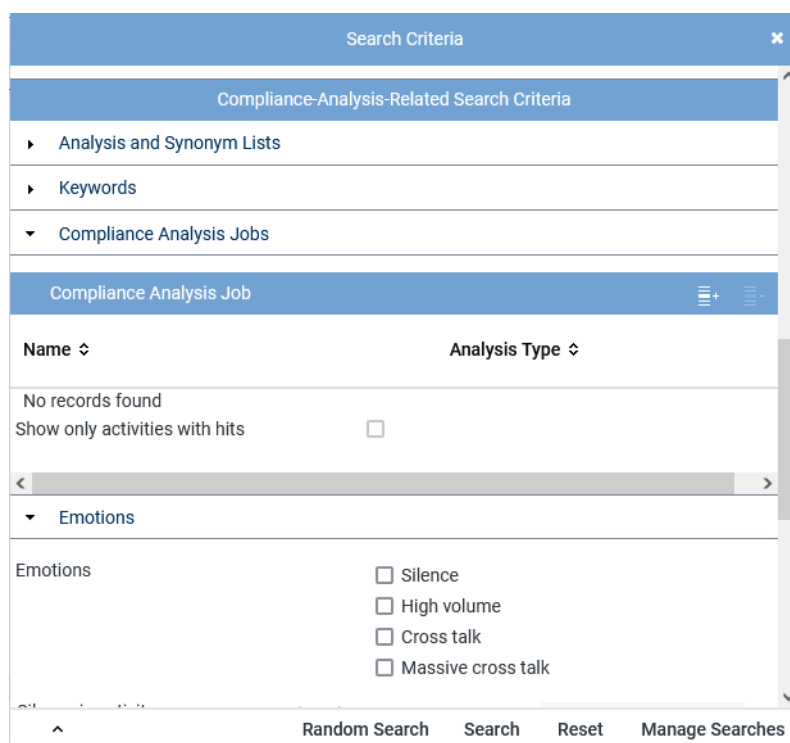



Fig. 4: Compliance analysis related search criteria (example)

The following submenus are available:

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

Compliance Analysis Jobs

Name

Analysis Direction

Analysis Type

Analyzed Activities

Activities with Hits

Hits

No records found

Rows per page

20

0 - 0 of 0


<<

>>

Add

Cancel

Fig. 5: Compliance analysis related search criteria (example)

- By clicking on the icon , the selection is deleted from the list.
- To add a criterion, select the respective element and click on the button *Add*. To discard the entries and return to the previous menu, click on the button *Cancel*.
- To activate a criterion from the submenu *Emotions* tick the respective check box.
- To search for the percentage of *silence in activity* and/or *silence in track*, select the corresponding search criteria (percentages of 0-100 or possible).

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

3.1.1.2 SCREENminer search criteria



SCREENminer search criteria are only displayed when there is a SCREENminer license in the system.

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

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



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

The following aspects can be assessed:

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

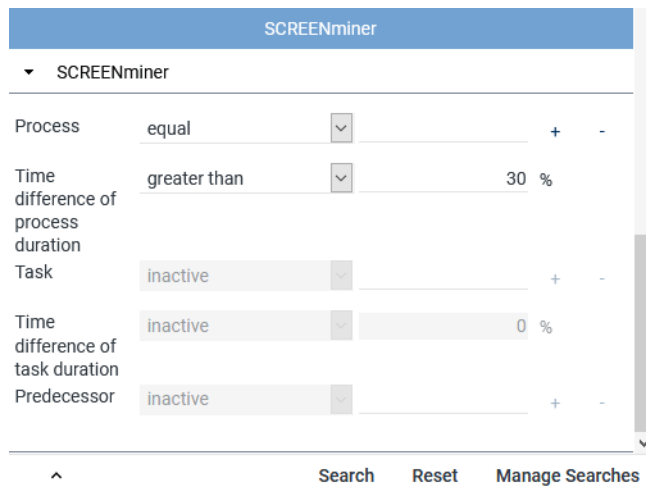




Fig. 6: SCREENminer search criteria (example)

The following options are available:

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

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

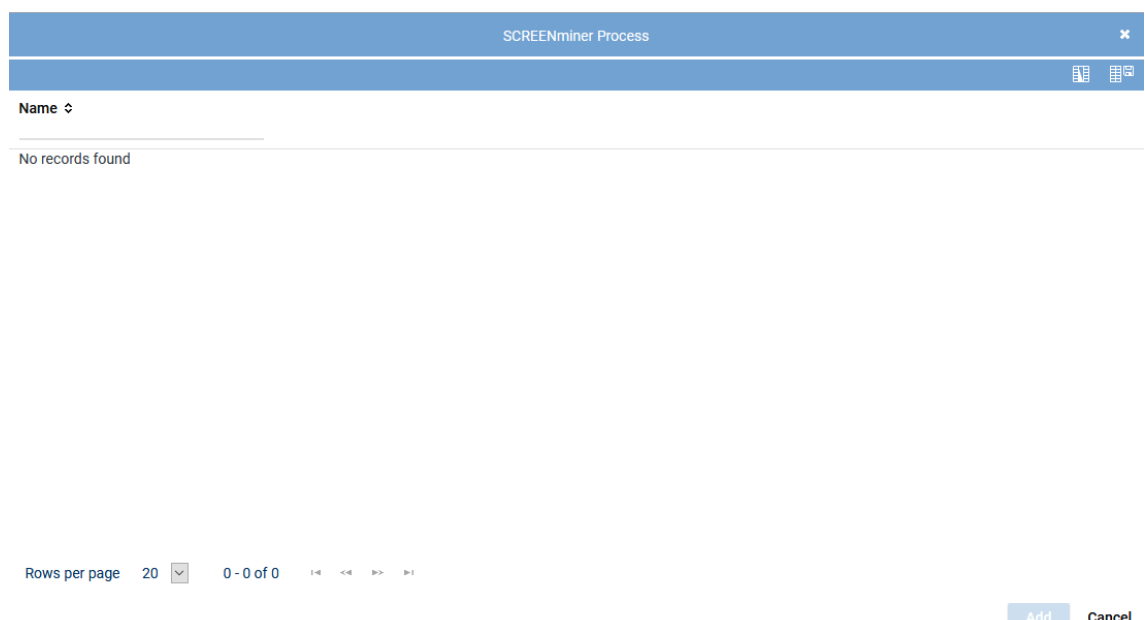
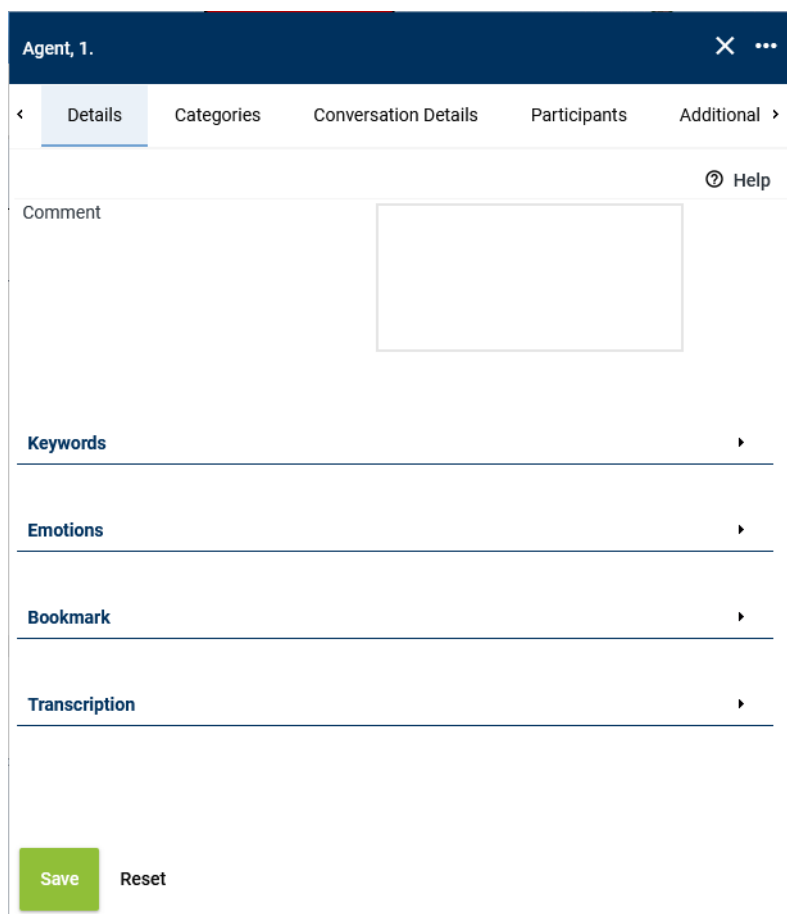


Fig. 7: Select process or task (example)

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

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



The screenshot shows a web interface for 'Agent, 1.'. At the top, there's a dark blue header with a close button (X) and a menu icon (three dots). Below the header is a tab bar with five tabs: 'Details' (selected), 'Categories', 'Conversation Details', 'Participants', and 'Additional'. The 'Details' tab is active, showing a 'Comment' field with a placeholder box. Below the comment field are four sections: 'Keywords', 'Emotions', 'Bookmark', and 'Transcription', each with a right-pointing arrow. At the bottom left, there are two buttons: 'Save' (green) and 'Reset' (grey).

Fig. 8: Detail view - activities (example)

The detail view consists of the following tabs:

- *Details*
Here, you can display and edit detailed information about the selected compliance analysis job. See [chapter "Tab Details", p. 17](#).
- *Categories*
Here, you can assign categories to the activity See [chapter "Tab Categories", p. 18](#).
- *Conversation Details*
Here, information about the selected conversation is displayed. See [chapter "Tab Conversation Details", p. 19](#).
- *Participant*
Here, information about participants of the selected conversation is displayed. See [chapter "Tab Participants", p. 20](#).
- *Additional Data*
Here, additional data is displayed which has been added to the selected activity. See [chapter "Tab Additional Data", p. 21](#).

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

You can change tabs without buffering without risking to lose already entered data.

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

4.1

Tab Details

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

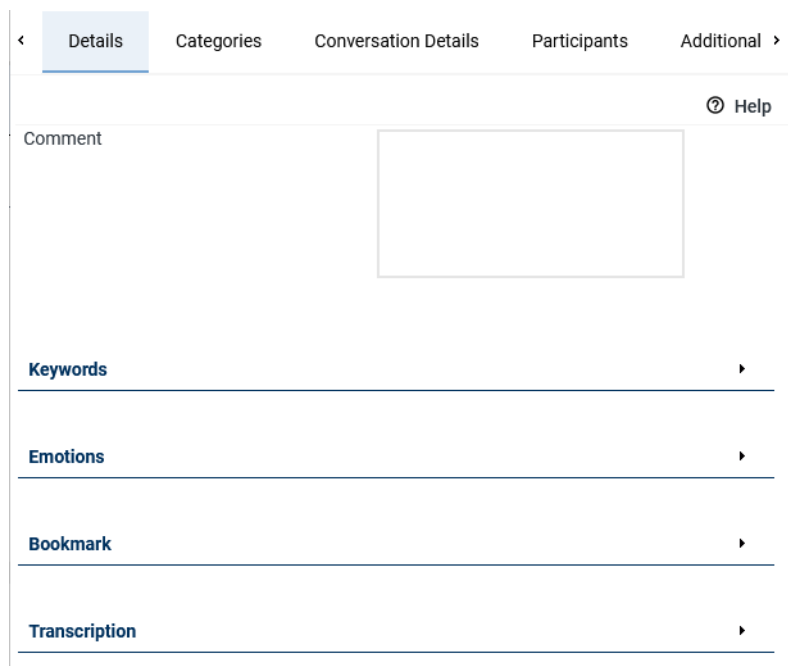


Fig. 9: Tab Details (example)

Comment

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

Group field Keywords



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

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

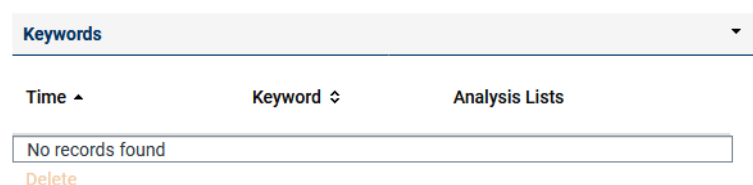


Fig. 10: Group field Keywords

Delete

Deletes the selected hit from the list.

Group field Emotions



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

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

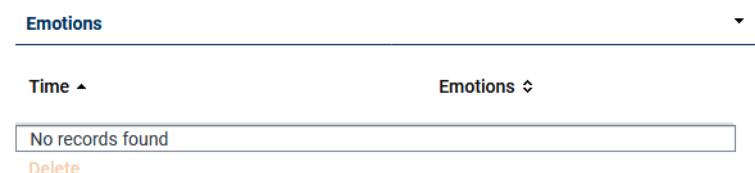



Fig. 11: Group field Emotions



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

Group field bookmark



This option is not available for all conversation types.

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

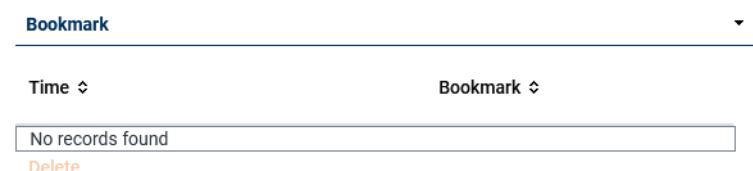



Fig. 12: Group field Bookmark



Deletes the selected bookmark from the list.

Group field Transcription



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

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

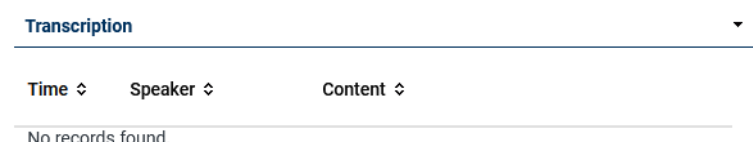


Fig. 13: Group field Transcription

4.2

Tab Categories

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

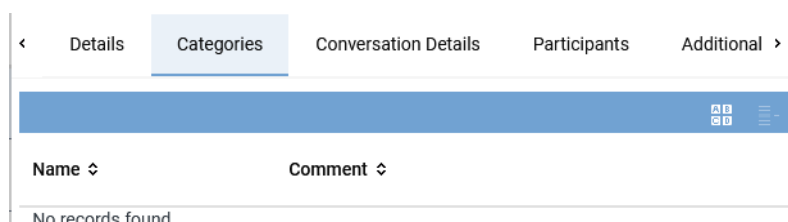



Fig. 14: Tab Categories




Administrate categories Opens a window in which you can create new categories and select or delete existing categories.
See

[chapter "Create and add new category", p. 43](#)
[chapter "Assign existing category", p. 46](#)
[chapter "Delete category", p. 50](#)

Additionally, you can view the assigned conversations of a category and add keywords in this window.

See

[chapter "View and filter assigned conversations", p. 47](#)
[chapter "Add and edit keywords", p. 48](#)




Remove

Deletes the assignment of the selected category.

See [chapter "Remove category assignment", p. 19.](#)

4.2.1 Remove category assignment

1. Select the tab *Categories*, see [chapter "Tab Categories", p. 18.](#)
2. To remove the assignment of a category, select the category in the list and click on the icon  (*Remove*).

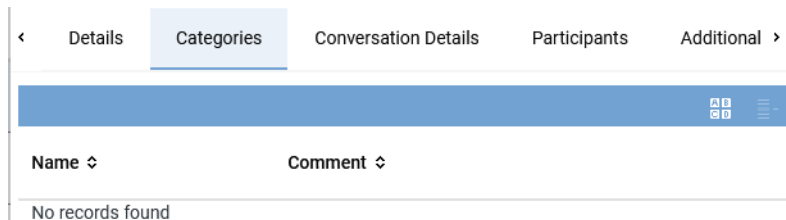


Fig. 15: Remove category assignment

4.3 Tab Conversation Details

Shows detailed information about the selected conversation.

Training Packages	Conversation Details	Participants	Additional Data
Conversation Information			
Start time	12/16/2018 10:10:14 PM		
End time	12/16/2018 10:11:04 PM		
Duration	00:00:50:680		
Conversation direction	Unknown		
Conversation ID	ff4b296c-2ef3-49dd-9b10-6d1c7208388d		
DTMF sequence			
Conversation type	CALL		
Statistics of the Conversation			
Number of ringing sections	3		
Duration of ringing sections	00:00:01:125		
Number of hold sections	0		
Duration of hold sections	00:00:00:000		
Number of connected sections	3		
Duration of connected sections	00:00:50:399		
Number of failed callbacks	0		
Number of successful callbacks	0		
Conversation ID of callback request			
Calling Party Information			
Calling party PBX Agent ID			
Calling party phone number			

Fig. 16: Tab Conversation Details (example)

A description of the displayed information can be found in [chapter "Main view", p. 7](#). The displayed information in the detail view depends on the configuration of the columns in the main view.

4.4 Tab Participants

Here, information about participants of the selected conversation is displayed.

Categories	Conversation Details	Participants	Additional Data
Type	Phone Number	PBX Agent ID	Time Slot ID
[i]	59630993		
[i]	59631991		

Fig. 17: Tab Participants (example)

The following functions are available:

- ☐ No sorting
- ☐ Descending sort sequence
- ☐ Ascending sort sequence

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

4.5

Tab Additional Data

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

< Categories
 Conversation Details
 Participants
 Additional Data
>

Additional Data
▼

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

Save
Reset

Fig. 18: Tab Additional Data (example)

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

5 **Replay module**

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

If conversations with screen or camera recordings are loaded into the Replay module, the window of the Video Viewer opens automatically for replaying the [video recording](#), see [chapter "Video Viewer", p. 36](#). The replay functions are executed synchronously for the conversation in the Replay module and for the video recording in the Video Viewer.

If conversations with chat texts or text messages (SMS or SDS) are loaded into the Replay module, the window of the Message Viewer opens automatically for displaying the chat texts or the text messages recording, see [chapter "Message Viewer", p. 38](#).

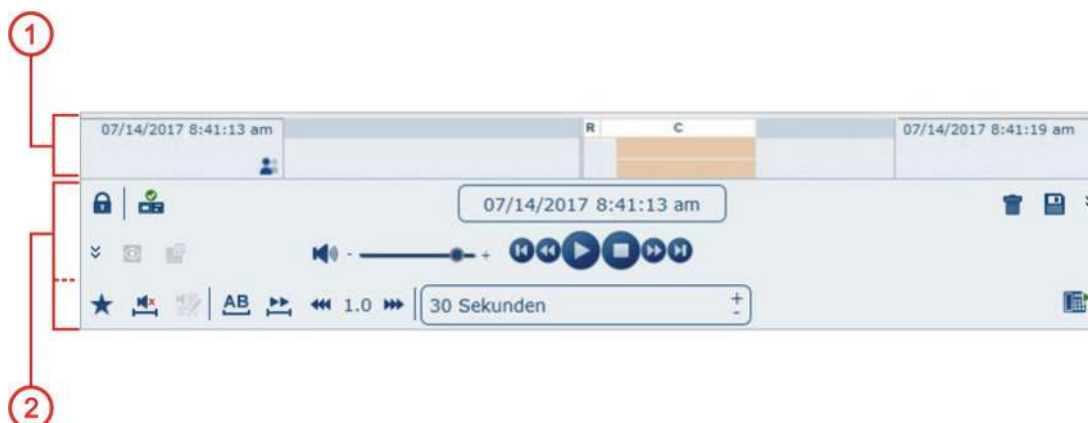




Fig. 19: Welcome screen (example)

1	Replay bar	Shows the loaded conversations, see chapter "Replay bar", p. 22 .
2	Functionality bar	Contains functionalities for the loaded conversations in the replay bar, see chapter "Functionality bar", p. 26 .

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

5.1 **Replay bar**

The replay bar shows the loaded conversations.

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

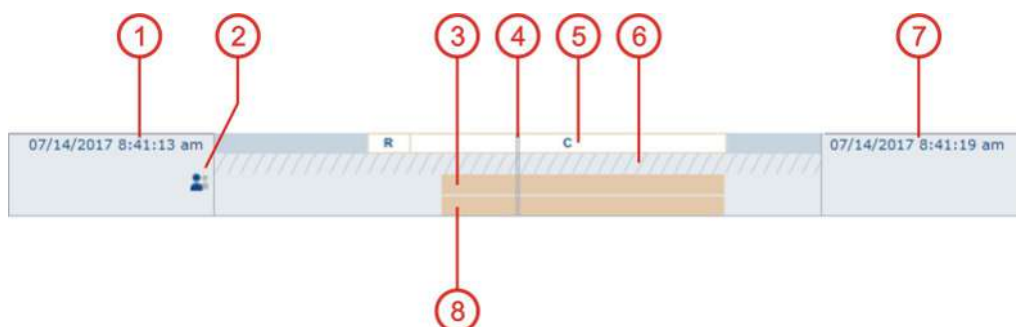


Fig. 20: Replay bar in full view

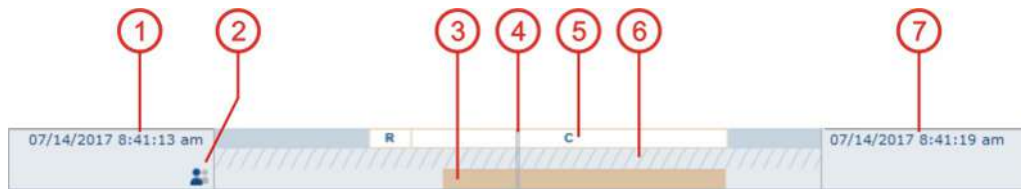







Fig. 21: Replay bar in compressed view

- 1 Shows the start time of the loaded conversation.
If several conversations have been loaded in 1 track, the start time of the earliest conversation is displayed here.
- 2 Displays information about the conversation participants.
The information is only visible when the replay bar is displayed in full view.
 -  = internal participants
 -  = external participants
 -  = mixed track with internal and external participants
 -  = unknown participants
 -  = screen recording
 To display the phone numbers of the participants in one track, move the mouse cursor across the participants icon.
- 3 Shows track 1 of a loaded conversation. For further information see [chapter "Display of the loading states", p. 24.](#)
- 4 Displays the replay position.
There are two options to change the current replay position of the loaded conversation:
 1. Click on the respective position with the mouse cursor.
 2. Click on a track, hold the mouse key down and drag it to the required position.
- 5 Displays the sections of a conversation.
The following sections are possible:
 - R = Ringing (a connection is being established)
 - C = Connected (at least 2 participants are calling each other)
 - H = Hold (a participant is on hold)
 - Q = Queued (a participant is being queued)
 - W = Wrap-up (wrap-up time)
- 6 Shows tagging and compliance analysis data (e. g. found keywords).
The line is only displayed if information is available.
- 7 Shows the end time of the loaded conversation.
If several conversations have been loaded in 1 track, the end time of the last conversation is displayed here.
- 8 Shows track 2 of a loaded conversation. For further information see [chapter "Display of the loading states", p. 24.](#)

5.1.1 Full view

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

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

5.1.2 Compressed view

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

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

5.1.3 Display of the loading states

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

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

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

⇒ The conversation can be replayed.



Fig. 22: Metadata loaded completely

2. Empty = Metadata for the recording are missing.

⇒ The conversation cannot be replayed.



Fig. 23: Metadata for the recording is missing

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

⇒ The conversation cannot be replayed.



Fig. 24: Defective packet in the metadata of the recording (full view)

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

⇒ The conversation cannot be replayed.



Fig. 25: Missing packet in the metadata of the recording (full view)

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

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

⇒ The conversation cannot be replayed.



Fig. 26: Defective or missing packet in the metadata of the recording (compressed view)

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

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

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



Fig. 27: Data buffer empty/loaded

7. Red = Data buffer not loaded completely.

⇒ The conversation is defective and cannot be replayed.

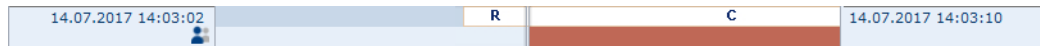


Fig. 28: Data buffer not loaded completely.

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

Red = Data buffer not loaded completely.

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

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

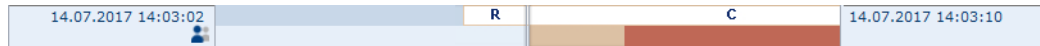


Fig. 29: Data buffer not loaded completely.

9. Purple = Packet is muted during the recording.

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



Fig. 30: Packet is muted during the recording.

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

Purple, light = Conversation section muted

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



Fig. 31: Conversation section muted

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

⇒ The conversation cannot be replayed.



Fig. 32: The recording contains data which is not supported.

12. Black = Recording blocked.

⇒ The conversation cannot be replayed due to a missing license during recording.



Fig. 33: Recording blocked

5.1.4 Display of detected emotions

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



Fig. 34: Emotions detected in a conversation (example)

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

- Light blue indicates sections of silence.

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

5.1.5 **Displaying spotted keywords**

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



Fig. 35: Spotted keywords in a conversation (example)

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

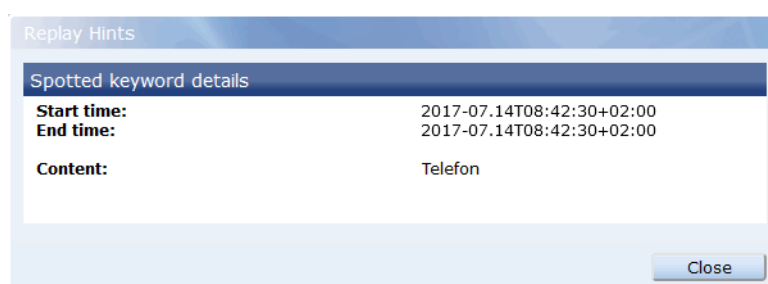









Fig. 36: Replay information with details of spotted keyword (example)
















5.2 **Functionality bar**









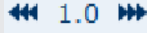






The functionality bar contains functionalities for the loaded conversations in the replay bar.

5.2.1 **Icons**

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

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

	<i>Lock element</i>	Shows that the lock for the Replay module has been deactivated. As a result, several conversations can be loaded into the Replay module. Note: In principle, you can load several video recordings into the Video Viewer. However, you can only replay one of them at any given moment.
		Shows that the lock for the Replay module has been activated. As a result, only one conversation can be loaded into the Replay module.
	<i>Reconnect to the replay component</i>	Refreshes the server connection.
	<i>Display video window</i>	Shows the Video Viewer in the main view of the application.
	<i>Hide video window</i>	Shows the main view of the application. The Video Viewer integrated into the main view is hidden.
	<i>Detach Video Viewer</i>	Displays the Video Viewer in its own window.
	<i>Attach Video Viewer</i>	Closes the window of the Video Viewer.
	<i>Echo filter on/off</i>	Shows that the echo filter has been activated.
		Shows that no echo filter has been activated.
	<i>Speaker on/off</i>	Shows that the speaker for the conversation has been activated.
		Shows that the speaker for the conversation has been deactivated.
	<i>Volume</i>	Adjusts the general replay volume. To change the volume, click on the slider, hold the mouse key down and move the slider to the left or to the right.
	<i>Clear playlist</i>	Removes all loaded conversations from the Replay module.
	<i>Export all loaded elements</i>	Saves the audio data of the loaded conversations as WAVE or MP3 file and the corresponding additional conversation data as CSV file on the hard disk of your computer, see chapter "Export all loaded elements", p. 29 .
	<i>Create new bookmark</i>	Sets a bookmark or marks the beginning of a conversation section at the current replay position, see chapter "Create new bookmark", p. 31 .

		Sets a bookmark or marks the end of a conversation section at the current replay position. You can enter a comment for the marked area between the 2 associated bookmarks, see chapter "Create new bookmark", p. 31 .
	<i>Create new mute notification</i>	Marks the beginning of a conversation section at the current replay position in order to mute selected participants, see chapter "Create new mute notification", p. 33 .
		Marks the end of a conversation section at the current replay position in order to mute selected participants, see chapter "Create new mute notification", p. 33 .
	<i>Loop</i>	Marks the beginning of a replay loop at the current replay position, see chapter "Mark replay loop", p. 35 .
		Marks the end of a replay loop at the current replay position, see chapter "Mark replay loop", p. 35 .
		Removes the taggings of the replay loop, see chapter "Mark replay loop", p. 35 .
	<i>Skip silence</i>	Shows that the automatic skipping of times of silence sections in a conversation and of mute sections between individual conversations has been deactivated.
		Shows that the automatic skipping of times of silence sections in a conversation and of mute sections between individual conversations has been activated. The silence sections found by an emotion detection job are skipped during the replay of the conversation. If several conversations are loaded into the Replay module, then the mute sections between the individual conversations are skipped during replay, too.
		Shows the current replay speed. The replay speed can be adjusted between 0.5 and 2.0. To reduce the replay speed, click on the icon  <i>Reduce replay speed</i> . To increase the replay speed, click on the icon  <i>Increase replay speed</i> .
	<i>Replay via phone</i>	Shows that the conversation replay via phone has been deactivated.
		Shows that the conversation replay via phone has been activated. To replay loaded conversations, click on the icon  (Play).
		Shows the time window for the loaded conversations. You can enter the time window in 25 steps from 1 second to 14 days. There are 2 possibilities to change the time window: 1. On the right in the time window, click on + or -.

2. Turn the mouse wheel while the mouse cursor is located above the replay track.

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Shows the current replay position.

Click into the display field to switch from absolute to relative time display and vice versa.



The absolute time display shows the date and the time of the current replay position.

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

Icons in the functionality bar on the right

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

Icons in the functionality bar on the left

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



Not all described icons exist in every module and application.

5.2.2 **Export all loaded elements**

1. Click on the icon  (*Export all loaded elements*).
⇒ The following window appears:

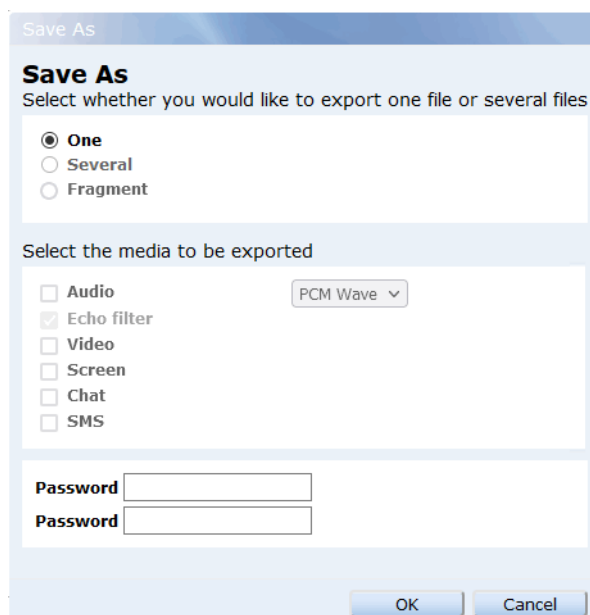


Fig. 37: Save as

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

One	Mixes all recordings of one or several conversations in one file.
------------	-------------------------------------------------------------------

	NOTICE! If you select several conversations, the gap between them is filled with silence. Selecting conversations with a large gap between them results in very large WAVE files. Therefore, make sure to only select conversations which are not separated by a large gap.
<i>Several</i>	Creates its own file for each recording to be saved.
<i>Fragment</i>	Only data contained in the set loop are saved. All other data is discarded.
<i>Audio</i>	<p>Saves the audio data.</p> <p>Select the audio format from the drop-down list:</p> <ul style="list-style-type: none"> • PCM Wave With PCM, the output file is not compressed and can be replayed by almost any player. This method requires a lot of storage capacity. • MP3 With MP3, the output file is compressed and can be replayed by almost any player. When using MP3, less storage space is required for high-quality recordings than when exporting conversations in WAVE format.
<i>Echo filter</i>	The echo filter has been activated for export by default. The echo filter detects and removes duplicate recordings for the respective participants within calls so that there is no echo in the replayed recordings caused by time offset of recording duplicates. If you would like to deactivate the echo filter for export, remove the check mark from the check box.
<i>Video</i>	<p>Saves the video data.</p> <p>Video is exported in MP4 format with video codec H.264. If the conversation contains more than one stream, only the first stream is exported.</p>
<i>Screen</i>	Saves the screen recordings.
<i>Chat</i>	Saves the chat text.
<i>SMS</i>	Saves the SMS data.
<i>Password</i>	Protects the ZIP file with a password.

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

⇒ The following window appears:

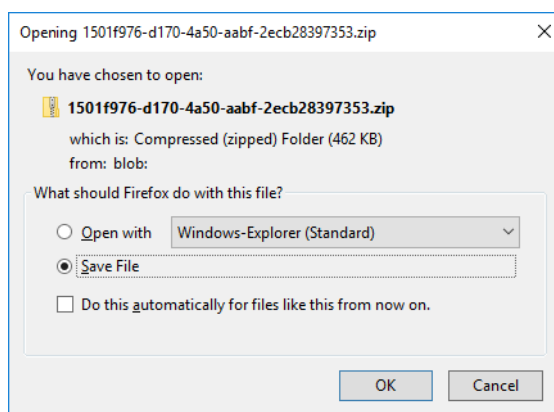


Fig. 38: Save conversations

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

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

⇒ The elements are exported to the local download directory in a ZIP file.
The ZIP file contains the following files:
The audio data is saved as **WAVE** or **MP3** file(s).

Audio data and screen recordings are saved as MP4 file(s).
 Video data is saved as MP4 file(s).
 Screen data is saved as MP4 file(s).
 The corresponding meta data is saved in the same directory as CSV file(s) under the same file name.
 Chat texts are saved as **XML** file(s).
 SMS data is saved as **XML** file(s).

5.2.3 Create new bookmark

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

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





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

5.2.3.1 Create bookmarks with replay comment



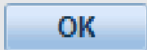

The current replay position has to be located within the conversation.

1. To mark the beginning of a conversation section for a replay comment, click on the icon  (*Create new bookmark*).
2. To mark the end of a conversation section for a replay comment, click on the icon  (*Create new bookmark*).

⇒ The following window appears:



Fig. 39: Tagging editor

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

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



Fig. 40: Tagging editor with entered comment (example)

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



Fig. 41: Conversation with tagged conversation section (example)

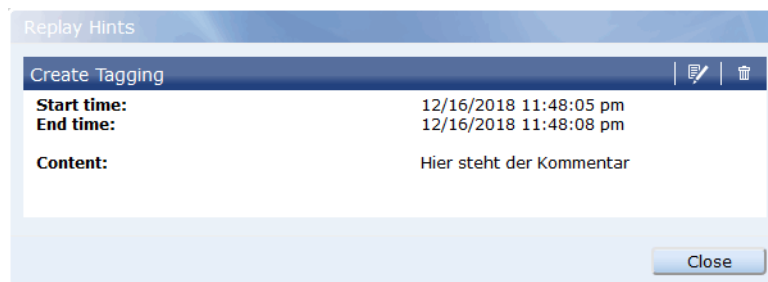


Fig. 42: Displayed information details (example)

5.2.3.2 Edit bookmarks with replay comment

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

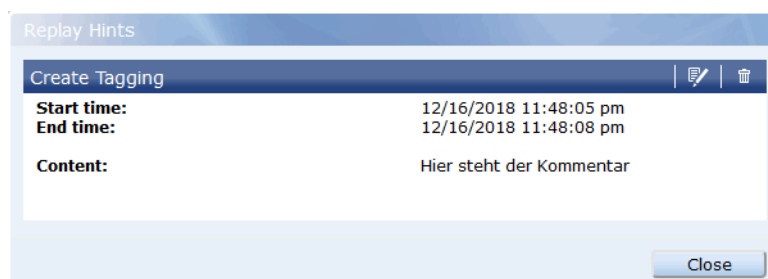



Fig. 43: Displayed information details (example)

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

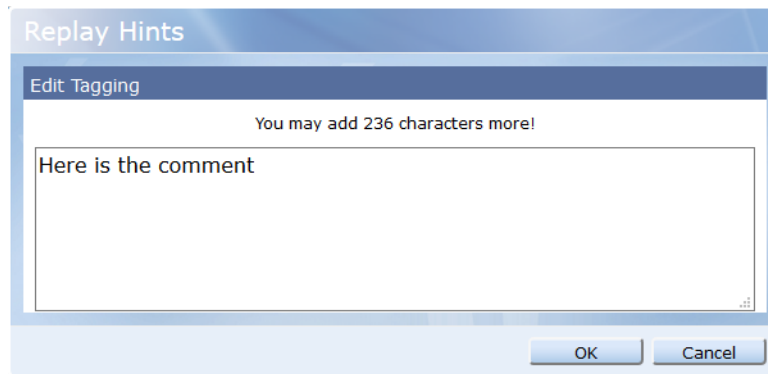
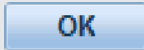



Fig. 44: Edit tagging (example)

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

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

5.2.3.3 Delete bookmarks with replay comment

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

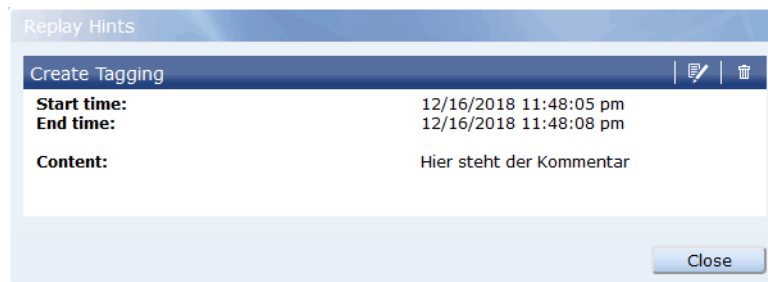



Fig. 45: Displayed information details (example)

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

5.2.4 Create new mute notification

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

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





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

5.2.4.1 Mute conversation section



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

1. To mark the beginning of a conversation section for the muting of selected participants, click on the icon  (*Create new mute notification*).

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

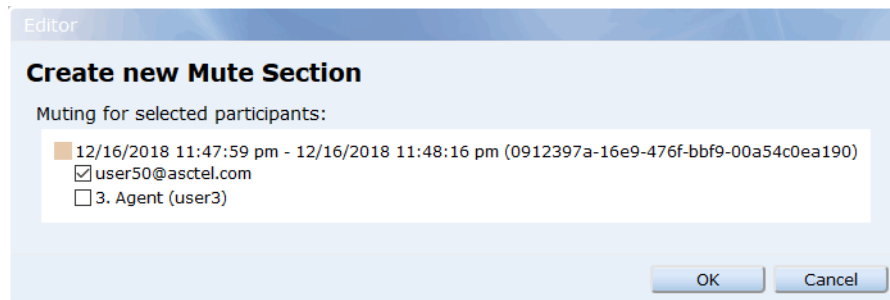
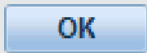



Fig. 46: Muting for selected participants (example)

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

3. Select the participants for whom the conversation section is supposed to be muted. At least 1 participant has to be muted.
☒ = Conversation muted for participant
☐ = Conversation not muted for participant
4. To save the entries, click on the button **OK**.
 ⇒ The muted conversation section is displayed as a gray area in the replay bar.
 ⇒ When replaying the conversation, the mute section details are displayed in the area of the muting.

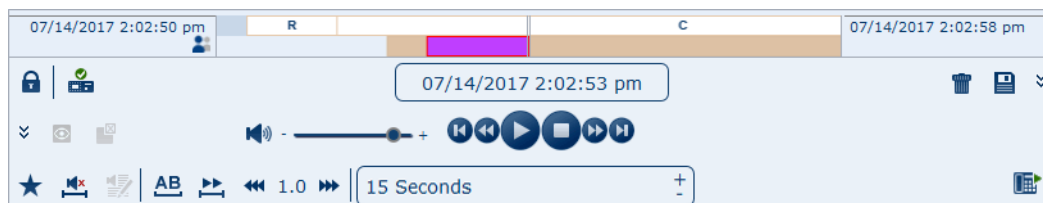


Fig. 47: Conversation with muted conversation section (example)

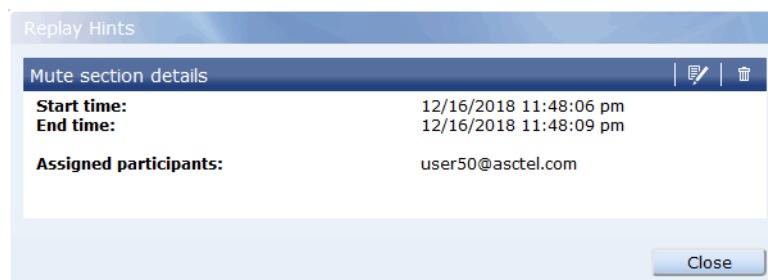


Fig. 48: Displayed mute section details (example)

5.2.4.2 Edit muted conversation section

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

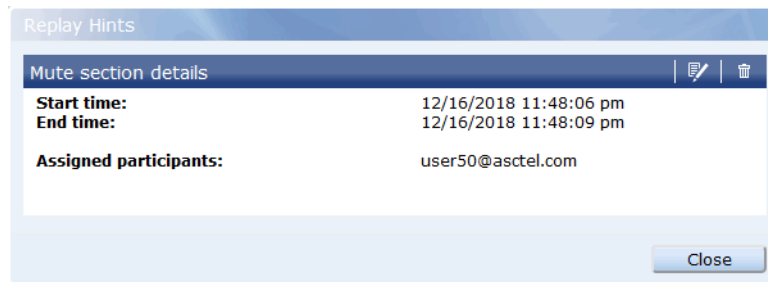



Fig. 49: Mute Section Details (example)

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

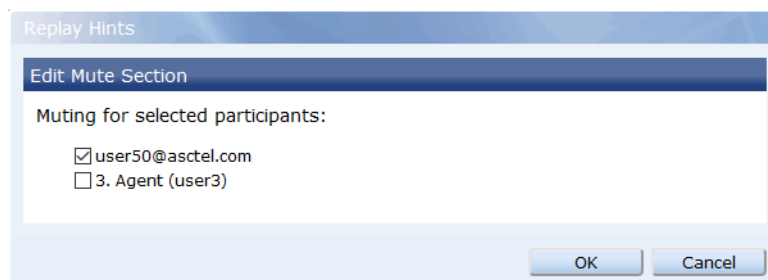
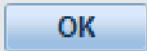



Fig. 50: Edit mute section (example)

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

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

5.2.4.3 Delete muted conversation section

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

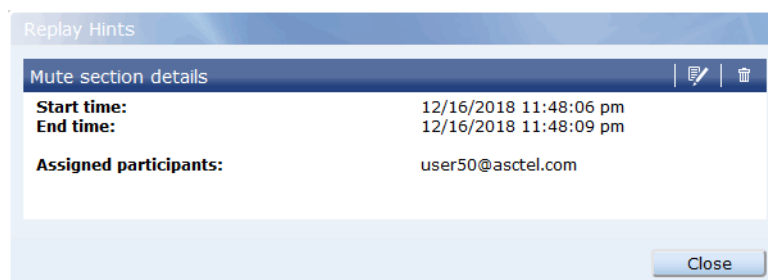





Fig. 51: Mute Section Details (example)

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

5.2.5 Mark replay loop

1. To mark the beginning of a replay loop at the current replay position, click on the icon  (Loop).
2. To mark the end of a replay loop at the current replay position, click on the icon  (Loop).

⇒ When the replay is started, the area between the marks is replayed in an endless loop.

3. To remove the marks of the replay loop, click on the icon  (Loop).

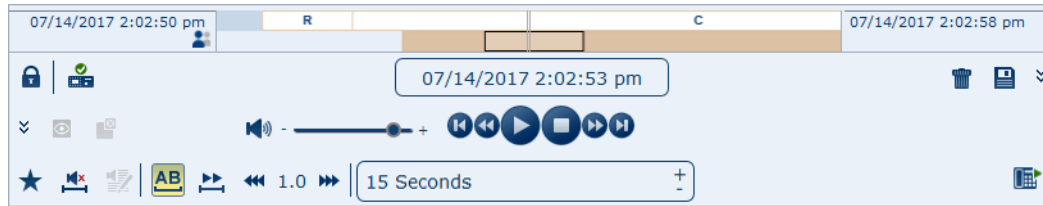


Fig. 52: Conversation with replay loop

5.3

Video Viewer

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



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

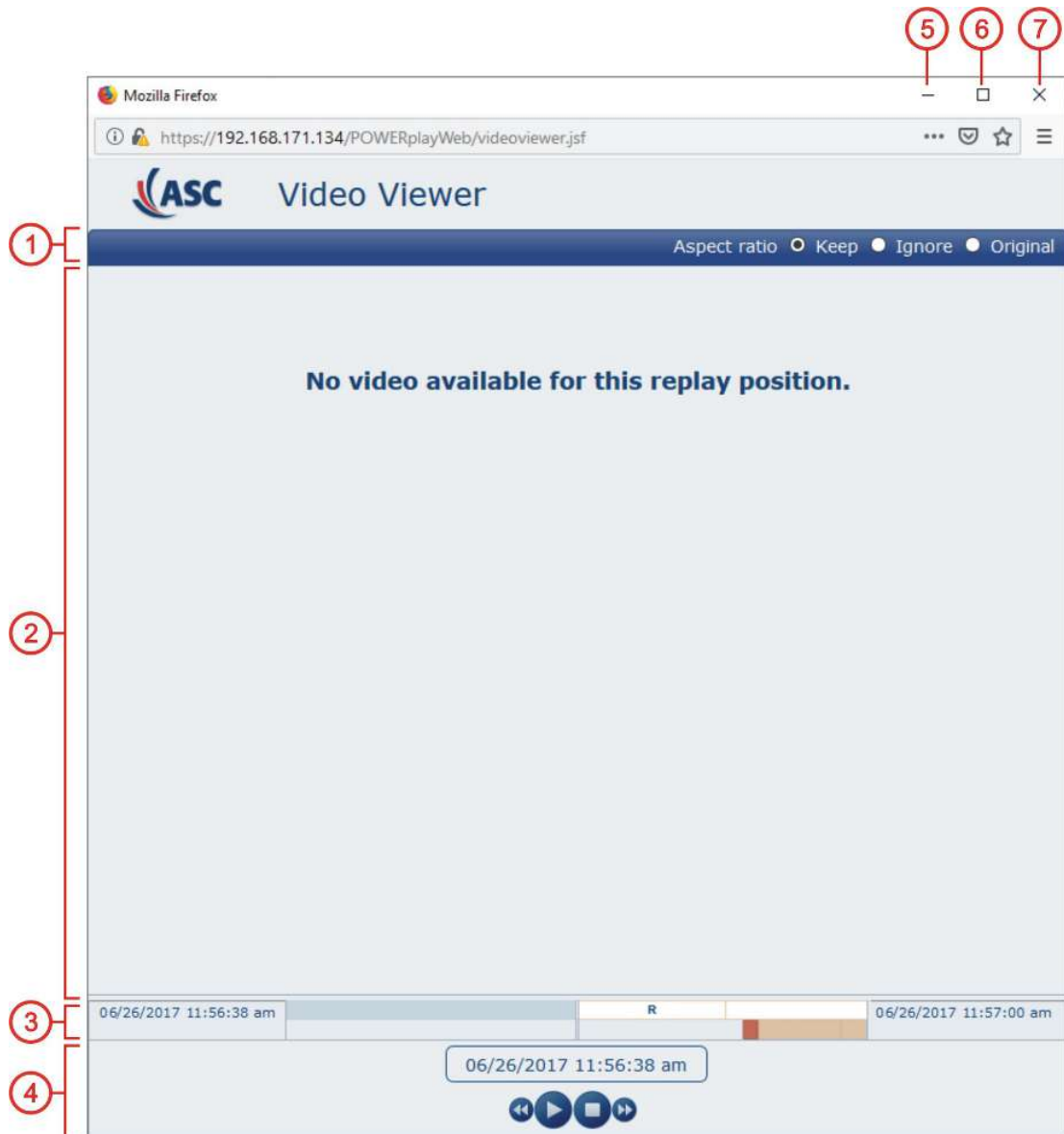






Fig. 53: Video Viewer (example)

1	Option bar	Contains settings for displaying video recordings, see chapter "Option bar", p. 37 .
2	Main view	Shows the Video recording .
3	Replay bar	Shows the loaded video recordings, see chapter "Replay bar", p. 37 .
4	Functionality bar	Contains functionalities for the loaded conversations in the replay bar, see chapter "Icons", p. 26 . In the Video Viewer, not all icons of the Replay module are available.
5	 (Minimize)	Minimizes the on-screen display to the program icon in the taskbar.
6	 (Maximize)	Maximizes the on-screen display to full-screen size.
	 (Reconstruct)	Reduces the on-screen display to the most recently selected reduced window size.
7	 (Close)	Closes the window of the Video Viewer.

5.3.1 Option bar

The option bar contains settings for displaying video recordings.



Fig. 54: Option bar

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

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

The replay bar shows the loaded video recordings.

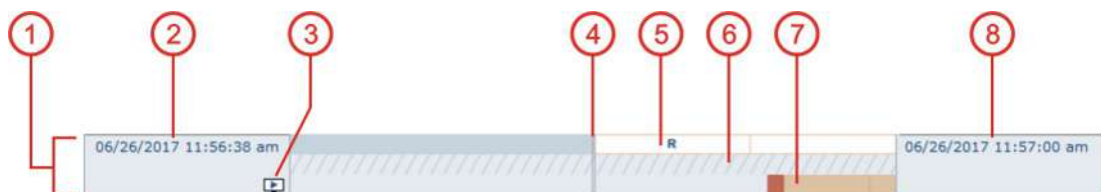


Fig. 55: Replay bar

1	Shows the track of a loaded video recording .
2	Shows the start time of the loaded conversation. If several conversations have been loaded in 1 track, the start time of the first conversation is displayed here.
3	Shows that this is the track of a video recording .
4	Displays the replay position. There are two options to change the current replay position of the loaded conversation: <ol style="list-style-type: none"> 1. Click on the respective position with the mouse cursor. 2. Click on a track, hold the mouse key down and drag it to the required position.
5	Displays the sections of a conversation. The following sections are possible: <ul style="list-style-type: none"> • R = Ringing (a connection is being established) • C = Connected (at least 2 participants are calling each other) • H = Hold (a participant is on hold) • Q = Queued (a participant is being queued) • W = Wrap-up (wrap-up time)
6	Shows tagging and compliance analysis data (e. g. found keywords). The line is only displayed if information is available.
7	Shows the conversation. For further information see chapter "Display of the loading states", p. 24 .
8	Shows the end time of the loaded conversation. If several conversations have been loaded in 1 track, the end time of the last conversation is displayed here.

5.4

Message Viewer

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

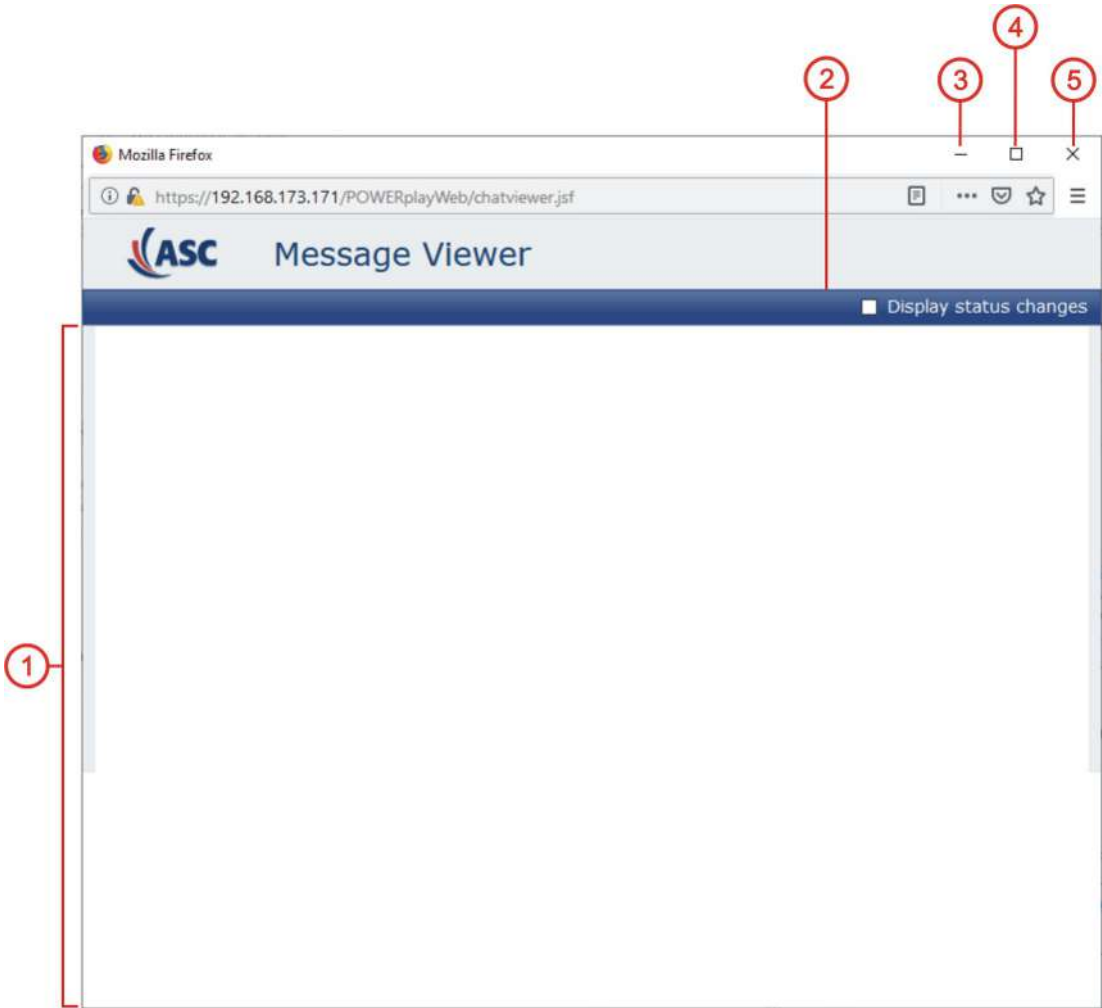






Fig. 56: Message Viewer

1	Main view	Displayed chat texts or text messages. See chapter "Main view", p. 39 .
2	<i>Display status changes</i>	<input checked="" type="checkbox"/> = Displays the status changes. <input type="checkbox"/> = Does not displays the status changes.
3	 (Minimize)	Minimizes the on-screen display to the program icon in the taskbar.
4	 (Maximize)	Maximizes the on-screen display to full-screen size.
	 (Reconstruct)	Reduces the on-screen display to the most recently selected reduced window size.
5	 (Close)	Closes the window of the Message Viewer.

5.4.1 Main view

The main view displays chat texts or text messages.

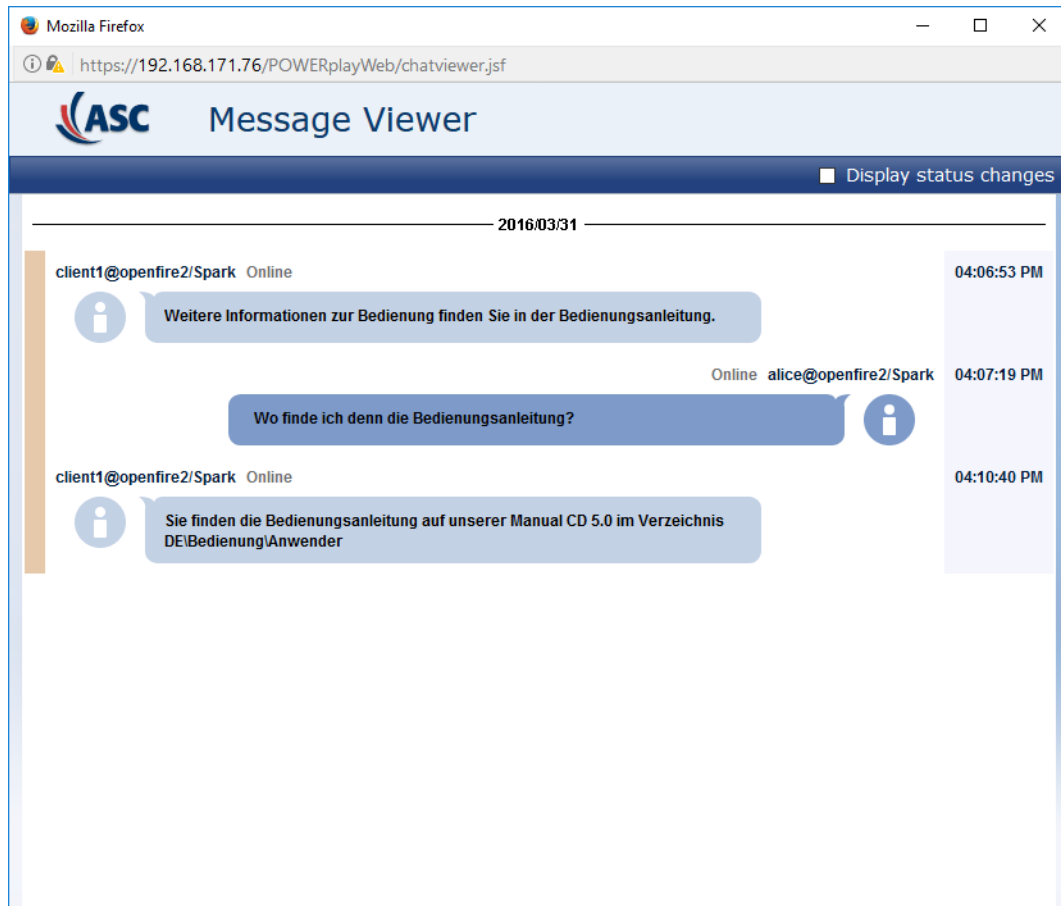


Fig. 57: Message Viewer without the display of the status changes (example)

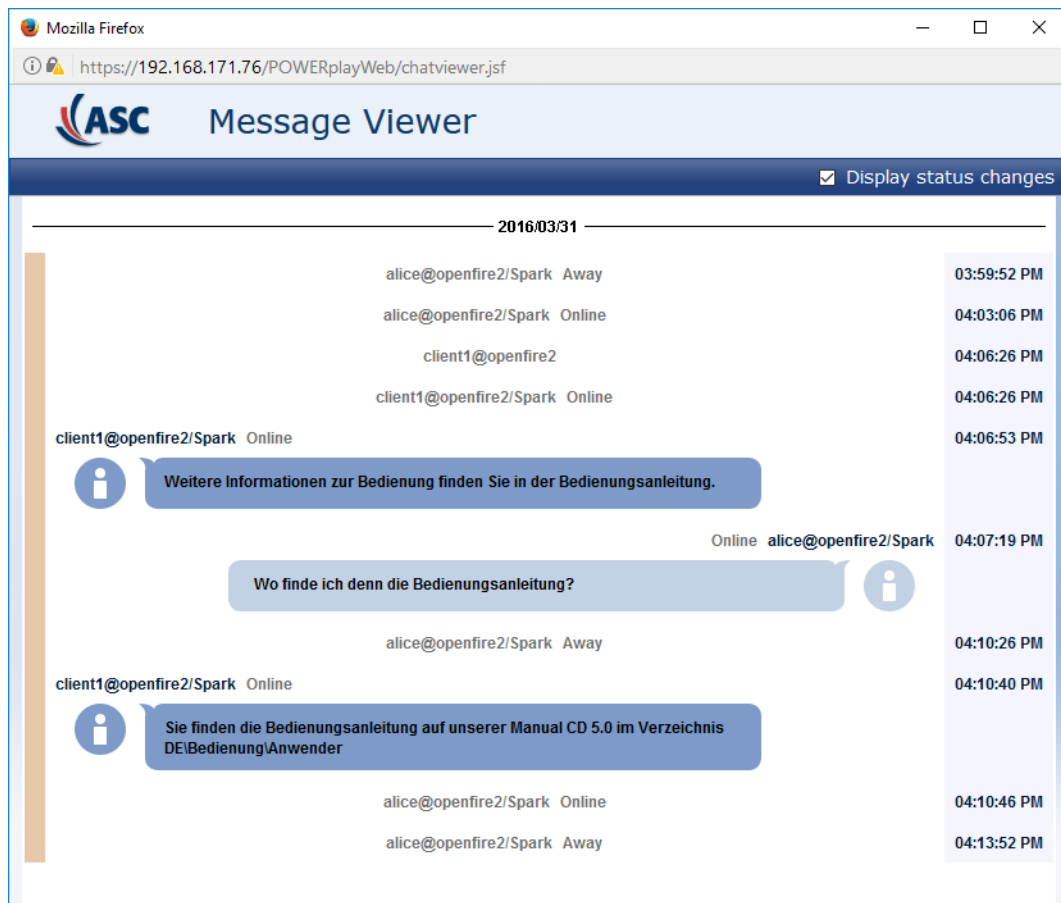


Fig. 58: Message Viewer with the display of the status changes (example)

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

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

6 Release activity for regular deletion

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

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

Administrate categories

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

1. Click on the menu item *Administrate Categories* in the menu *Activities* of the toolbar.
⇒ The window *Administrate Categories* appears.

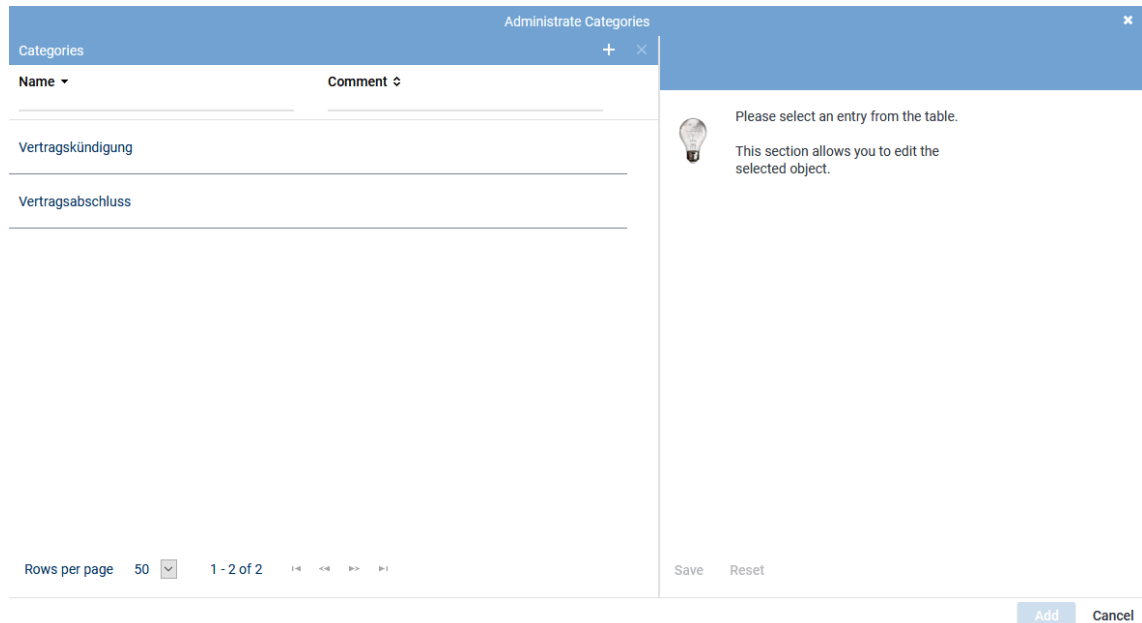



Fig. 59: Administrate categories

The following functions are available:

- [chapter "Create and add new category", p. 43](#)
- [chapter "Assign existing category", p. 46](#)
- [chapter "Rename existing category", p. 46](#)
- [chapter "View and filter assigned conversations", p. 47](#)
- [chapter "Add and edit keywords", p. 48](#)
- [chapter "Delete category", p. 50](#)

7.1

Create and add new category

1. In the menu *Activities* of the toolbar, click on the menu item *Administrate Categories* or alternatively go to the detail view of a selected activity, open the tab *Categories* (see [chapter "Tab Categories", p. 18](#)) and click on the icon  (*Administrate categories*).

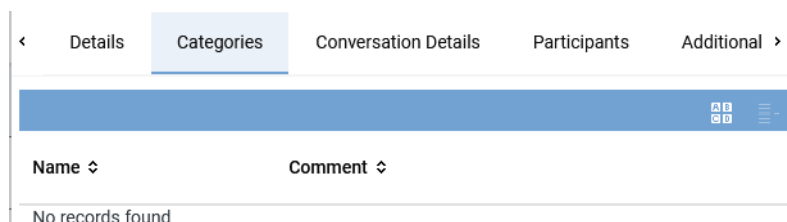
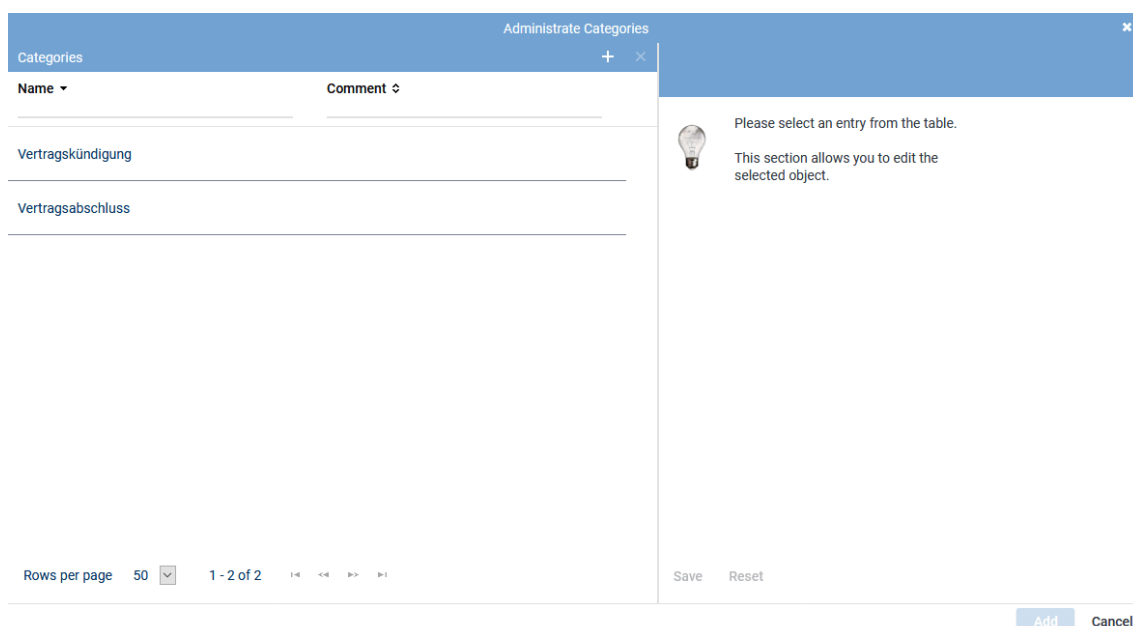


Fig. 60: Tab Categories of the detail view

- ⇒ The window *Administrate Categories* appears.



Categories

Name ▼ Comment ↕

Vertragskündigung	
Vertragsabschluss	

Rows per page 50 1 - 2 of 2

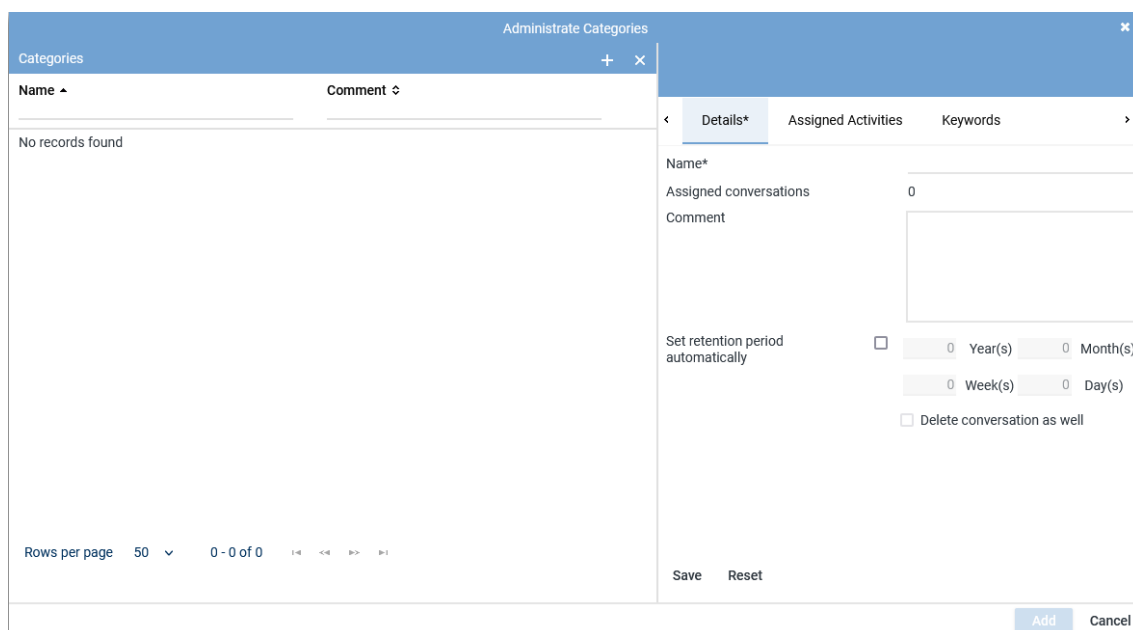
Save Reset

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

Add Cancel

Fig. 61: Create new category

- Click on the icon **+** (*Create*) in the toolbar of the main view.
- In the detail view, click on the tab *Details*.
- In the entry field *Name*, enter a name for the category.
- Enter a comment for the category in the entry field *Comment*, if required.



Categories

Name ▲ Comment ↕

No records found

Rows per page 50 0 - 0 of 0

Save Reset

Details* Assigned Activities Keywords

Name*

Assigned conversations 0

Comment

Set retention period automatically ☐ 0 Year(s) 0 Month(s) 0 Week(s) 0 Day(s)

☐ Delete conversation as well

Add Cancel

Fig. 62: Create new category

- To save the category, click on the button *Save*.
To discard the unsaved settings, click on the button *Reset*.
- To assign the category to a activity, click on the button *Add*.
To close the window without applying a category, click on the button *Cancel*.

7.2 Set delete time automatically

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

ATTENTION!


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

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

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



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

1. In the menu *Activities* of the toolbar, click on the menu item *Administrate Categories* or alternatively go to the detail view of a selected activity, open the tab *Categories* (see [chapter "Tab Categories", p. 18](#)) and click on the icon  (*Administrate categories*).

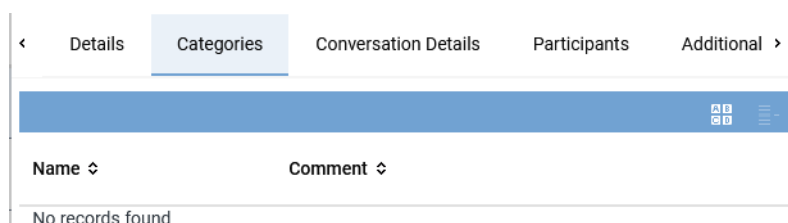


Fig. 63: Tab Categories of the detail view

⇒ The window *Administrate Categories* appears.

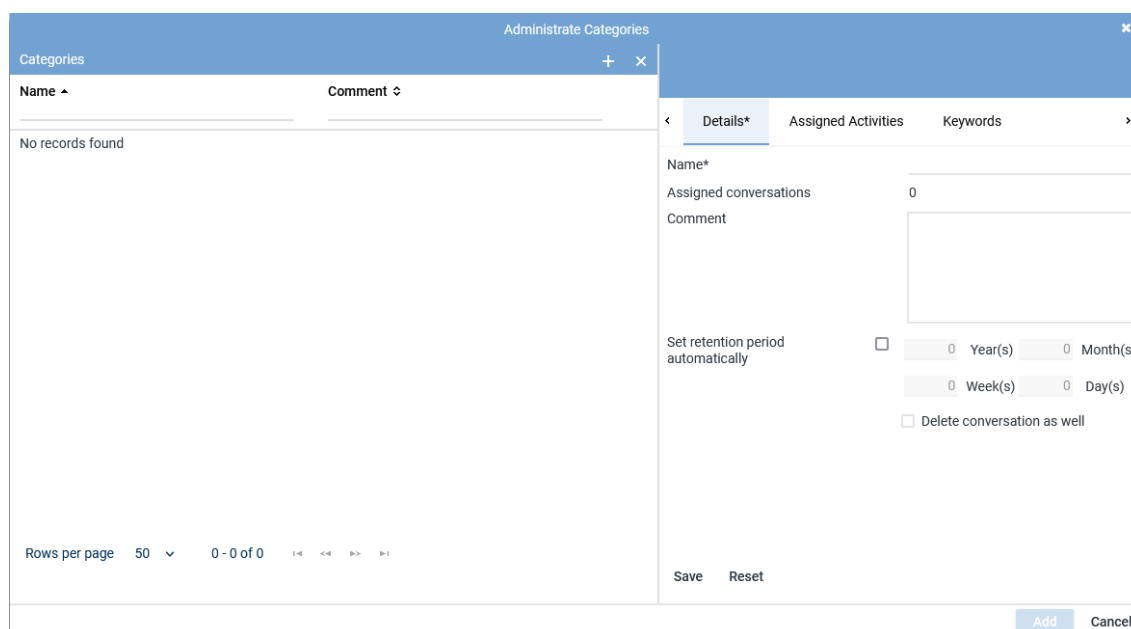



Fig. 64: Set delete time automatically

2. Activate the check box *Set retention period automatically*.
3. Enter the new retention period in years, months, weeks, and days.
4. Activate the check box *Delete conversation as well* if the corresponding conversation is supposed to be deleted together with the activity.

- To add the entries to the category, click on the button *Save*.
To discard the unsaved settings, click on the button *Reset*.

7.3

Assign existing category

- In the menu *Activities* of the toolbar, click on the menu item *Administrate Categories* or alternatively go to the detail view of a selected activity, open the tab *Categories* (see [chapter "Tab Categories", p. 18](#)) and click on the icon  (*Administrate categories*).

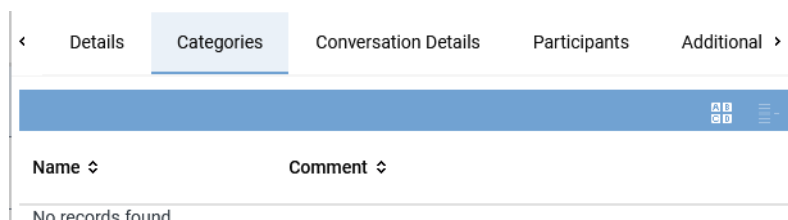


Fig. 65: Tab Categories of the detail view

⇒ The window *Administrate Categories* appears.

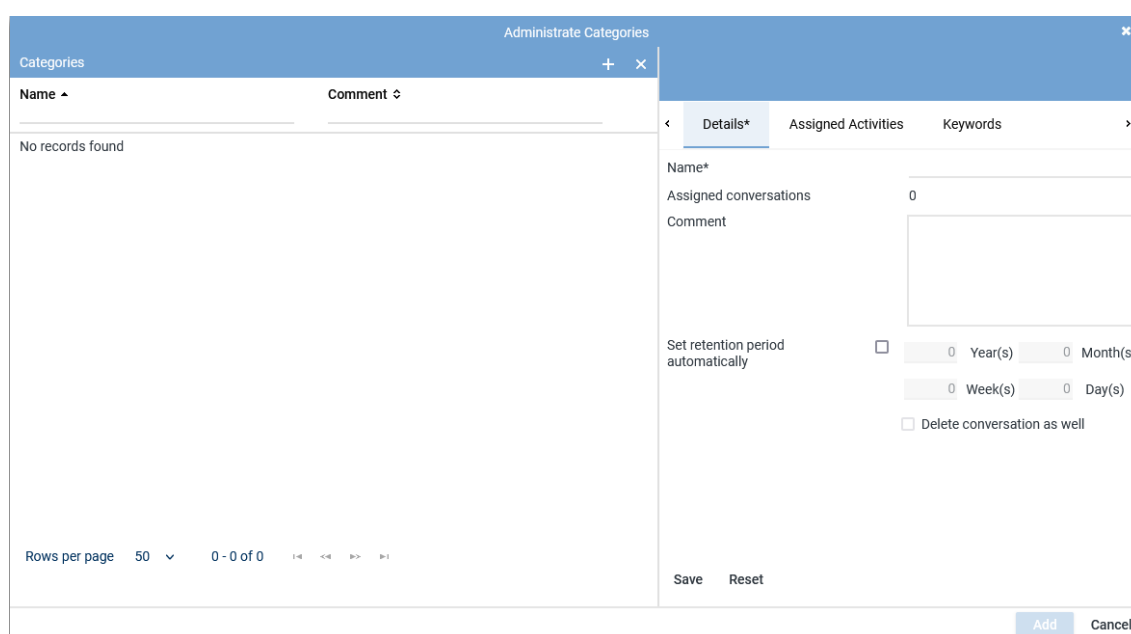



Fig. 66: Administrate categories

- Select an category from the list in the main view.
- To assign the category to a activity, click on the button *Add*.
To close the window without applying a category, click on the button *Cancel*.

7.4

Rename existing category

- In the menu *Activities* of the toolbar, click on the menu item *Administrate Categories* or alternatively go to the detail view of a selected activity, open the tab *Categories* (see [chapter "Tab Categories", p. 18](#)) and click on the icon  (*Administrate categories*).

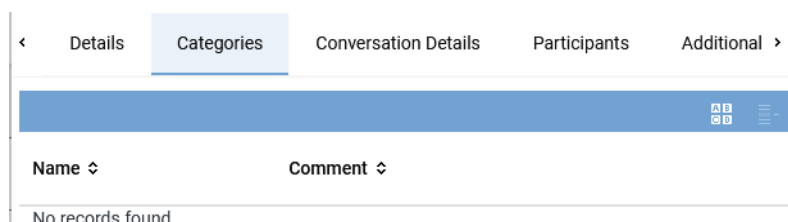


Fig. 67: Tab Categories of the detail view

⇒ The window *Administrate Categories* appears.

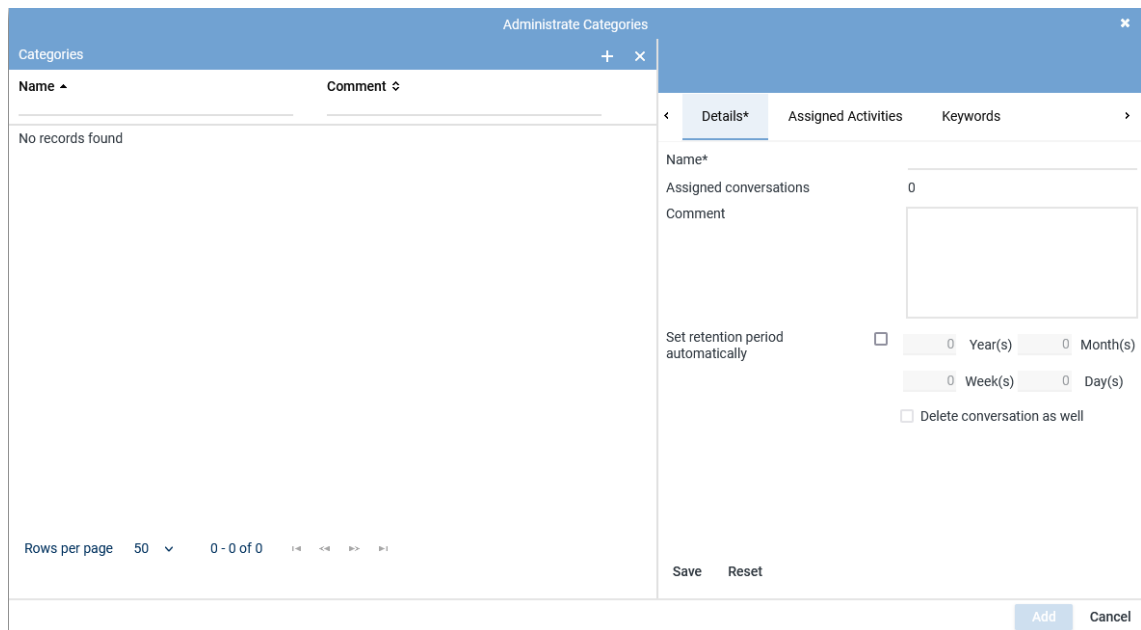



Fig. 68: Add category

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

7.5 View and filter assigned conversations

Here, you can view all conversations assigned to a category and call up information about the conversation. In addition, you can filter all assigned conversations according to the traders' names.

1. In the menu *Activities* of the toolbar, click on the menu item *Administrate Categories* or alternatively go to the detail view of a selected activity, open the tab *Categories* (see [chapter "Tab Categories", p. 18](#)) and click on the icon  (*Administrate categories*).

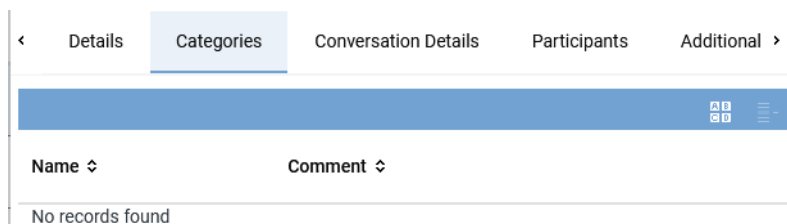


Fig. 69: Tab Categories of the detail view

⇒ The window *Administrate Categories* appears.

2. Select a category.
3. In the detail view, click on the tab *Assigned Activities*.
4. To filter the assigned conversations according to the traders' names, enter the name in the field *Trader*.







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

Fig. 70: View assigned conversations

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

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

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

Info

Details

Trader

Duration

Start time

End time

Mustermann, Max

12:00:22 AM

01/09/2019 3:56:45 PM

01/09/2019 3:57:08 PM

Close

Fig. 71: View information

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

7.6

Add and edit keywords



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



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



For basic information about creating and administrating keywords and compliance analysis jobs refer to the user manual *INSPIRATION\$neo\$ for Compliance - Usage Compliance Analysis module*.

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

1. In the menu *Activities* of the toolbar, click on the menu item *Administrate Categories* or alternatively go to the detail view of a selected activity, open the tab *Categories* (see [chapter "Tab Categories", p. 18](#)) and click on the icon (📁) (*Administrate categories*).

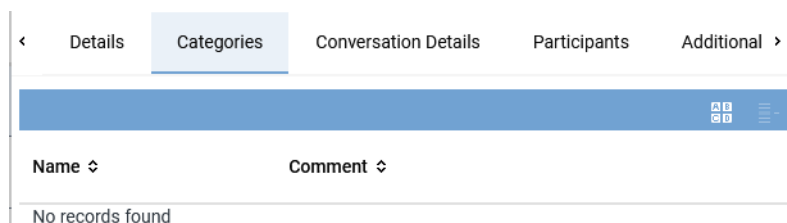


Fig. 72: Tab Categories of the detail view

⇒ The window *Administrate Categories* appears.

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

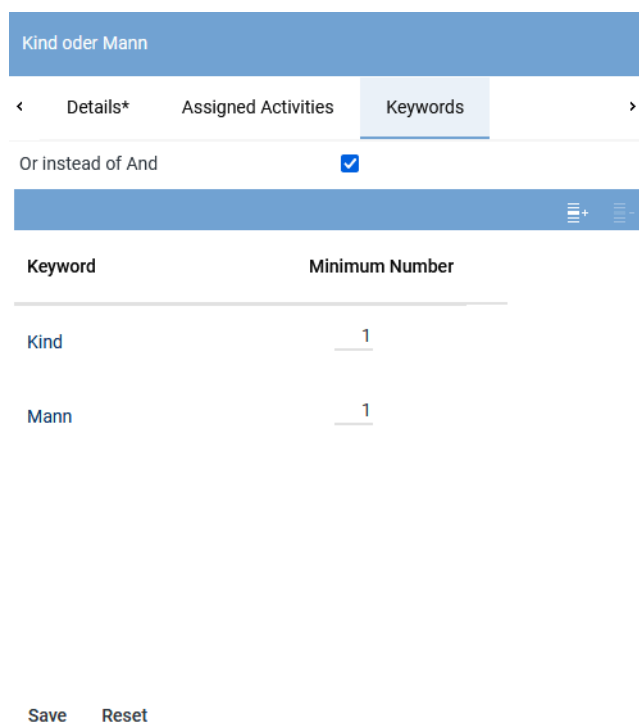
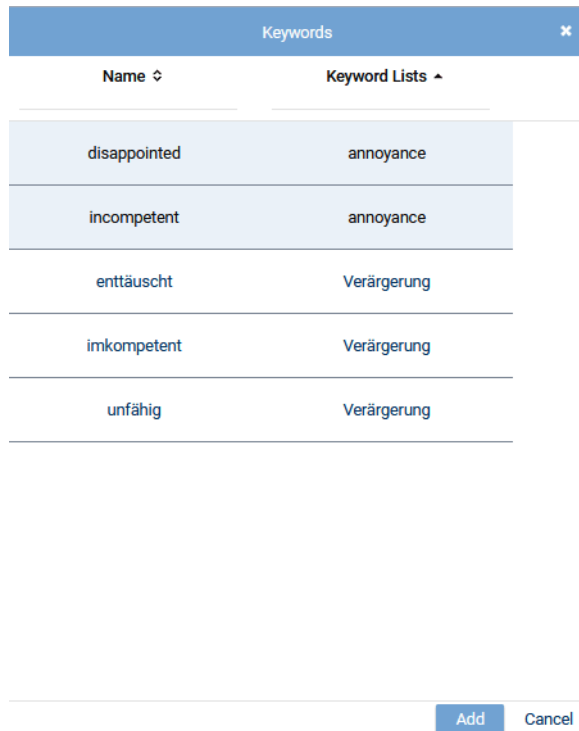



Fig. 73: Tab Keywords

6. Select 1 or several keywords in the window *Keywords*.
7. In order to filter keywords based on the name, enter the name in the field *Name*. Alternatively, you can filter for entire lists by means of the field *Keyword Lists* if you would like to add all keywords of an analysis list. To select several keywords, click on the respective keywords while holding the [Ctrl] key down.
8. Click on the button *Add*.
 - ⇒ The keywords are displayed in the tab *Keywords*. Upon saving, the keywords have been sorted into the selected category.




Name ↕	Keyword Lists ↕
disappointed	annoyance
incompetent	annoyance
enttäuscht	Verärgerung
inkompetent	Verärgerung
unfähig	Verärgerung

Fig. 74: Add keywords

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

7.7 Delete category

1. In the menu *Activities* of the toolbar, click on the menu item *Administrate Categories* or alternatively go to the detail view of a selected activity, open the tab *Categories* (see [chapter "Tab Categories", p. 18](#)) and click on the icon  (*Administrate categories*).

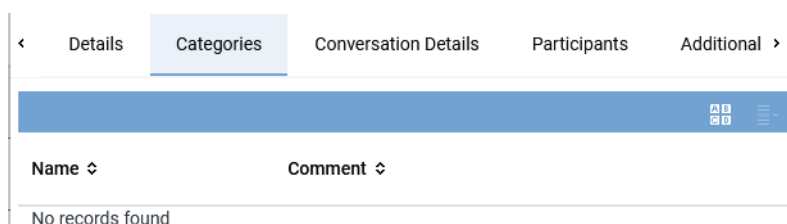


Fig. 75: Tab Categories of the detail view

⇒ The window *Administrate Categories* appears.

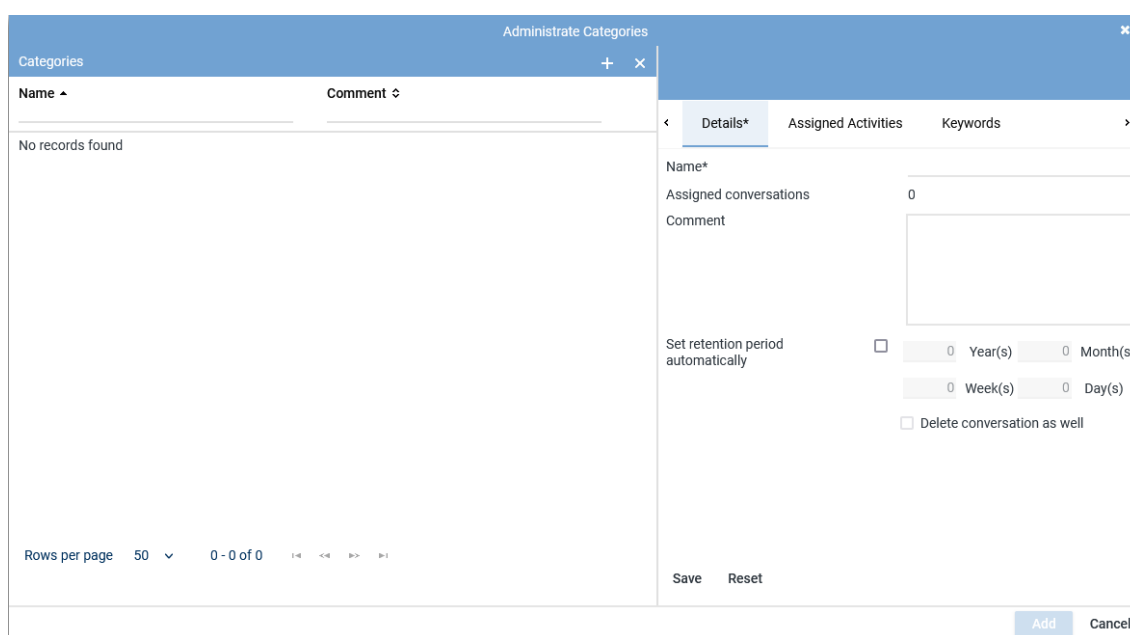




Fig. 76: Delete category


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



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

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

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

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

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

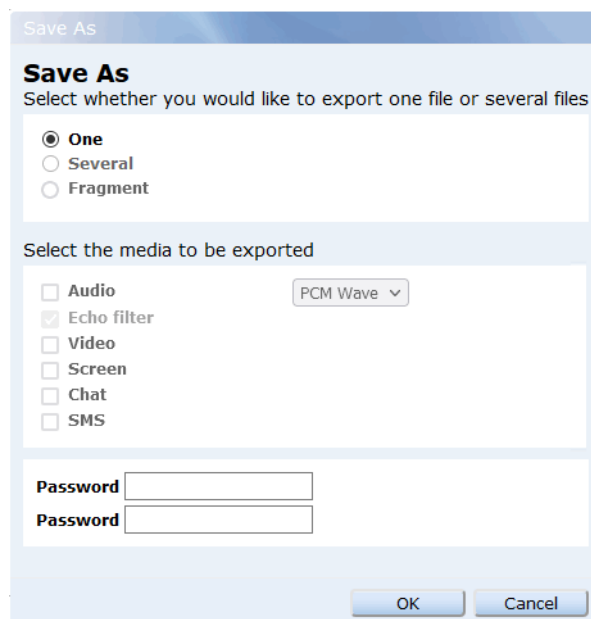
4. The activity is loaded into the Replay module and can be replayed there.
For information about the functions of the Replay module see [chapter "Replay module", p. 22](#).



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

Export activity

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



The 'Save As' dialog box has a title bar 'Save As'. Below it, the text 'Select whether you would like to export one file or several files' is followed by three radio buttons: 'One' (selected), 'Several', and 'Fragment'. Below this, the text 'Select the media to be exported' is followed by a list of checkboxes: 'Audio' (unchecked), 'Echo filter' (checked), 'Video' (unchecked), 'Screen' (unchecked), 'Chat' (unchecked), and 'SMS' (unchecked). To the right of the 'Audio' checkbox is a dropdown menu showing 'PCM Wave'. Below the checkboxes are two text input fields, both labeled 'Password'. At the bottom right are 'OK' and 'Cancel' buttons.

Fig. 77: Save as

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

<i>One</i>	<p>Mixes all recordings of one or several conversations in one file.</p> <p>NOTICE! If you select several conversations, the gap between them is filled with silence. Selecting conversations with a large gap between them results in very large WAVE files. Therefore, make sure to only select conversations which are not separated by a large gap.</p>
<i>Several</i>	Creates its own file for each recording to be saved.
<i>Fragment</i>	Only data contained in the set loop are saved. All other data is discarded.
<i>Audio</i>	<p>Saves the audio data.</p> <p>Select the audio format from the drop-down list:</p> <ul style="list-style-type: none"> <i>PCM Wave</i> <p>With PCM, the output file is not compressed and can be replayed by almost any player. This method requires a lot of storage capacity.</p> <i>MP3</i> <p>With MP3, the output file is compressed and can be replayed by almost any player. When using MP3, less storage space is required for high-quality recordings than when exporting conversations in WAVE format.</p>
<i>Echo filter</i>	The echo filter has been activated for export by default. The echo filter detects and removes duplicate recordings for the respective participants within calls so that there is no echo in the replayed recordings caused by time offset of recording duplicates. If you would like to deactivate the echo filter for export, remove the check mark from the check box.
<i>Video</i>	<p>Saves the video data.</p> <p>Video is exported in MP4 format with video codec H.264. If the conversation contains more than one stream, only the first stream is exported.</p>

<i>Screen</i>	Saves the screen recordings.
<i>Chat</i>	Saves the chat text.
<i>SMS</i>	Saves the SMS data.

<i>Password</i>	Protects the ZIP file with a password.
-----------------	----------------------------------------

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

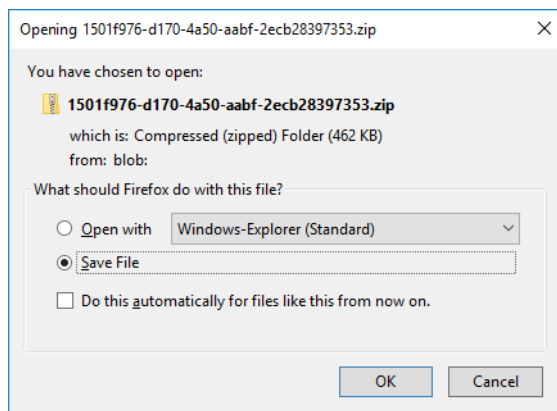


Fig. 78: Save conversations

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



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

This function allows you to search the activities for hits.

1. In the toolbar of the main view in the menu *Activities*, click on the menu item *Logical Keyword Search*.
⇒ The window *Logical Keyword Search* appears.
2. Here, you can search for keywords in the activity.

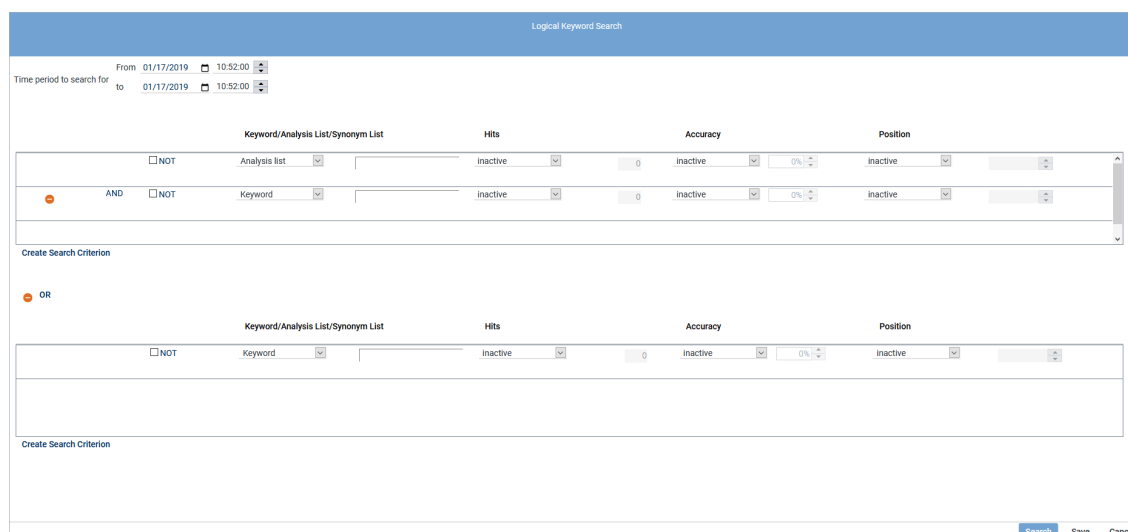




Fig. 79: Logical Keyword Search

The main window is divided into 2 sections:

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

The list of search criteria contains the following columns:

- **Keyword/Analysis List/Synonym List**
Here, you can select whether you would like to search for individual words or entire lists.
 - Keywords are entered by auto-complete. You can only enter words which have actually been found previously by an Compliance Analysis module job.
 - The lists are entered by auto-complete. You can enter all lists which have previously been created in the Compliance Analysis module regardless of whether this list has actually delivered hits.
- **Hits**
You have two options:
 - *inactive* = The criterion has been deactivated.
 - *equal* = The number of the actual hits exactly matches the value entered.
 - *smaller or equal* = The number of the actual hits is smaller than or equal to the value entered.

- *greater or equal* = The number of the actual hits is greater than or equal to the value entered.

- Accuracy

You have two options:

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


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

- Position

You have two options:

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

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

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

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

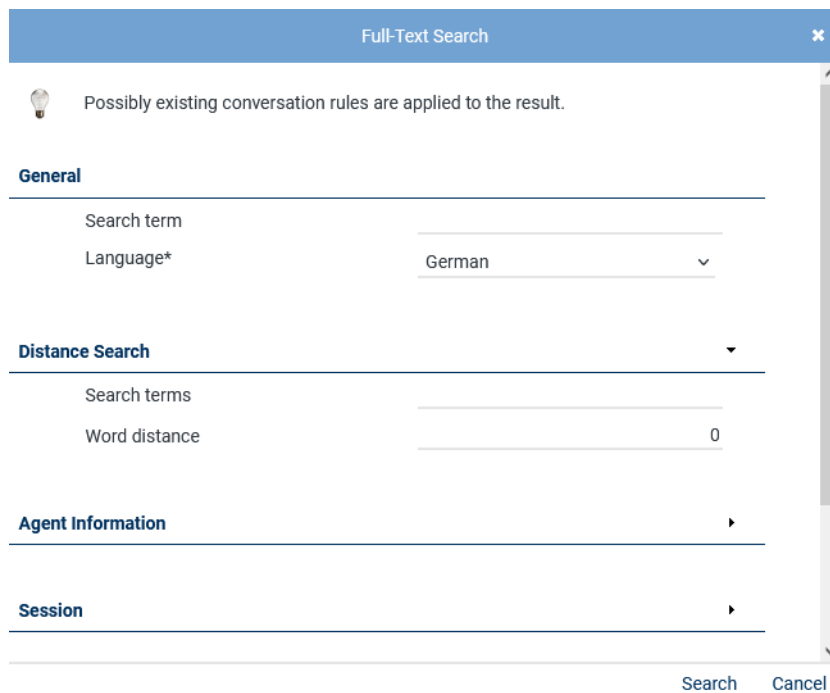
3. To run the search, click on the button *Search*.
4. To save the search, click on the button *Save*.
5. To cancel the search, click on the button *Cancel*.



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

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


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




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

Fig. 80: Full-Text Search


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

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

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

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

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

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


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

Fig. 81: Transcription

There are the following columns:

<i>Time</i>	Date and time the activity was created.
<i>Speaker</i>	Name of the participants of the activity.
<i>Content</i>	Transcription of the audio.

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Glossary

MP3

With regard to audio compression, MP3 uses lossy data-compression to encode data using inexact approximations and the partial discarding of data. MP3 compression works by reducing (or approximating) the accuracy of certain components of sound that are considered (by psychoacoustic analysis) to be beyond the hearing capabilities of most humans. The remaining audio information is then recorded in a space-efficient manner.

MP4

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

PCM

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

TTL

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

Video data

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

Video recording

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

WAVE

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

XML

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