

System Configuration

SCREENminer Rules



Administration manual

for tenants

5/19/2022

Product line Neo, version 7.x

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

EVOIPneo

EVOLUTIONneo / XXL / eco

EVOflex (country-specific)

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2 Introduction

In the SCREEN_{miner} Rules module, you can define reference processes for work items. These reference processes allow comparing the agents' work steps and assessing their efficiency. The recorded sessions are assessed in the application INSPIRATION_{neo} on basis of these reference processes. Deviations in terms of the duration of processes can be displayed in a report in INSIGHT_{neo}. The results indicate where training is required and allow you to assign trainings accordingly.

The following aspects can be evaluated:

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

A process can consist of several tasks. The beginning and the end of a process are marked by certain screen activities (start and end triggers). To be able to add start and end triggers to the processes and tasks, you have to go to the Recording Planner module to upload recording filters which contain screen activities which have been defined as filters.

Upon activating a reference process, you can compare new recorded work items with this reference process in the Sessions module of the application INSPIRATION_{neo}.

NOTICE! Work items which have been recorded before the reference process has been activated cannot be used for comparison purposes.



You can create recording filters by means of the application SCREEN_{rec} scan Editor, see user manual *SCREEN_{rec} scan*.

Open the SCREEN_{miner} Rules module by clicking on the menu item *SCREEN_{miner} Rules* in the navigation bar.



Basic information about using the application System Configuration can be found in the user manual for administrators *System Configuration - General information*.



For information about the Recording Planner module refer to the administration manual for tenants *Recording Planner*.



For information about the Sessions module refer to the user manual *INSPIRATION_{neo} - Sessions module*.

3 Licenses

To configure and use the SCREEN^{miner} Rules module, the following license must be available in the system:

License name	Number	Description
SCREEN ^{<u>miner</u>}	1 per client computer	License to configure and use the SCREEN ^{<u>miner</u>} Rules module

Tab. 1: Licenses SCREENminer

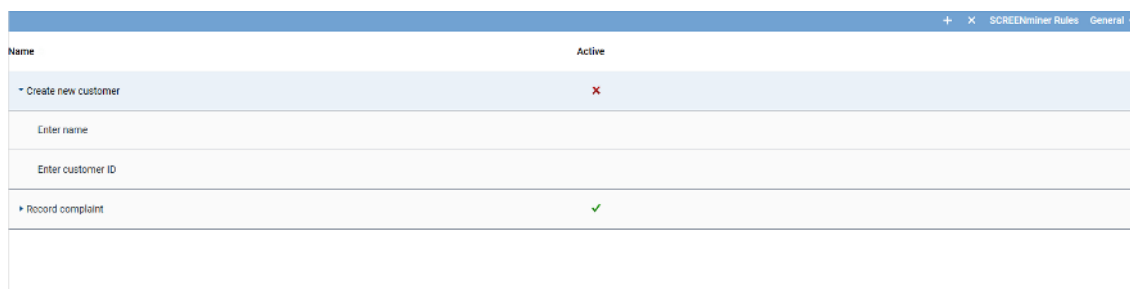
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Main view

The main view displays all saved *SCREENminer* rules.

Click on the menu item *SCREENminer Rules* in the navigation bar to open the table of the main view.

When defining these rules, you can divide processes into several tasks. Therefore, the main view is organized in a tree structure.



Name	Active
▶ Create new customer	✗
Enter name	
Enter customer ID	
▶ Record complaint	✓

Fig. 1: Main view



By clicking on the icons ▶ or ▼ in front of a process, you can show or hide the tasks which have been created for this process.

The following information is displayed in the main view:

<i>Name</i>	Name of the process or of the task.
<i>Active</i>	Shows whether the process has been activated. ✓ = Process has been activated. ✗ = Process has been deactivated. NOTICE! This information is only available for processes.

4.1

Toolbar

The toolbar offers the following functions:

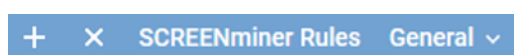


Fig. 2: Toolbar

+	Create	Creates a new process or a new task, see chapter "Create process", p. 9 or chapter "Create task", p. 10 .
✗	Delete	Deletes the selected process or the selected task. NOTICE! You can only delete a process if it has not been activated.
General	General help	Opens the online help.
	Module help	Opens the module-specific online help.



For detailed descriptions of the default functions such as *Search*, *Print*, *Adjust table* or *Help* refer to the user manual for system providers *General information - System Configuration*.

5 Detail view

Click on an element in the table of the main view to display and edit the settings of the selected process or task in the detail view.

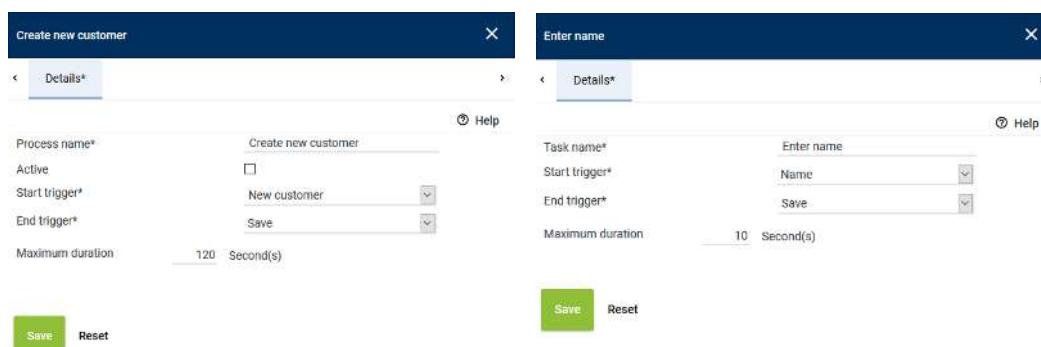


Fig. 3: Detail view (examples)


Process name or Task name	Name of the process or of the task.
Active	<p>Select whether the process is supposed to be activated.</p> <p><input checked="" type="checkbox"/> = Process has been activated. The agents' activities are assessed by means of the defined triggers and process durations.</p> <p><input type="checkbox"/> = Process has been deactivated.</p> <p>NOTICE! This option is only available for processes.</p>
Start trigger	<p>Select the screen activity which is supposed to be considered as the beginning of the process or of the task.</p> <p>Select the start trigger from the drop-down list. The drop-down list contains all triggers which have been defined in the recording filter.</p>
End trigger	<p>Select the screen activity which is supposed to be considered as the end of the process or of the task.</p> <p>Select the end trigger from the drop-down list. The drop-down list contains all triggers which have been defined in the recording filter.</p>
Maximum duration	Select a maximum duration that the process or the task is not supposed to exceed. The time that the agents have actually required is compared with the duration entered here and assessed individually.



You cannot use the same start trigger for several active processes or tasks within a process.

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Create process

1. Click on the icon  (*Create*) in the toolbar.
2. Select the option *Create New Process*.

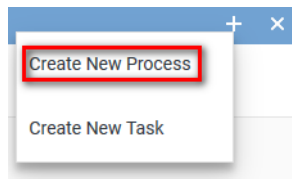



Fig. 4: Create process

3. Adjust all necessary settings in the detail view, see [chapter "Detail view", p. 8](#).
4. To save the settings, click on the button *Save*.



A new task is always added behind the last task of the process and cannot be dragged to a different position. For this reason, create the tasks in the order they are supposed to have in the process.

1. In the main view, select the process for which you would like to create tasks.
2. Click on the icon  (*Create*) in the toolbar.
3. Select the option *Create New Task*.

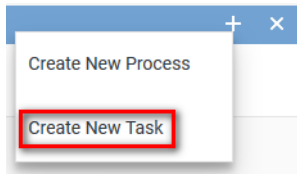


Fig. 5: Create task

4. Adjust all necessary settings in the detail view, see [chapter "Detail view", p. 8](#).
5. To save the settings, click on the button *Save*.

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Edit process or task

1. In the main view, select the process or task that you would like to edit.
2. Make all necessary changes in the detail view, see [chapter "Detail view", p. 8](#).
3. To save changes, click on the button *Save*.
To discard changes, click on the button *Reset*.

9 Activate process

9 Activate process

1. In the main view, select the process you would like to activate.
 2. Activate the check box *Active* in the detail view, see [chapter "Detail view", p. 8](#).
 3. Click on the button *Save* to save the change.
- ⇒ The process can be used as reference process for work items in the application INSPIRATION_{neo}.

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Glossary