

INSPIRATION^{neo} for Compliance

General information



User manual

8/11/2022

Product line Neo, version 7.x

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

INSPIRATION^{neo} for Compliance

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2 Introduction

INSPIRATION_{neo} for Compliance is a server-based application which users can access via a browser.

The application INSPIRATION_{neo} for Compliance is a solution based on existing voice recordings. INSPIRATION_{neo} for Compliance consists of modules and enables financial service providers to search for certain criteria in the legally stipulated recordings of calls, screen content, and corresponding additional information and analyze them. Evidence-proof call recording serves documentation and archiving purposes, protects against claims for compensation or actions for liability, and fosters risk management and prevention of fraud in the fiercely contested direct banking market. Trade activities become transparent and previously unstructured data can be analyzed in a target-oriented manner and turned into valuable information.

INSPIRATION_{neo} for Compliance offers flexible and individual possibilities of access control. This ensures that compliance officers as well as traders can analyze their calls.

The following functionalities are possible:

- **Implementing compliance analyses**

Users can search for specific content in the recorded activities as well as evaluate or sort them according to different methods of voice analysis methods regarding compliance aspects..



An activity can be a trader's recorded phone call or can additionally include the corresponding screen activity.

3 Background

Financial institutions have an increased interest in evidence-based call recording due to several different factors. In addition to protection against unjustified claims for compensation, improved customer service, and cost minimization, the continuously increasing pressure regarding legal compliance places ever higher demands on financial service providers. INSPIRATION^{neo} for Compliance offers financial institutions the possibility to document all their trading activities according to uniform guidelines, to analyze them, and to take timely countermeasures in the event of any compliance breaches.

After logging in to INSPIRATION^{neo} for Compliance, users can access functions and modules to capture, save, and archive calls, screen content as well as corresponding additional information.

The following modules are available:

- Traders module

Information about traders can be managed.

- Activities module

Activities can be searched in a target-oriented way and replayed.

- Compliance Analysis module

You can identify activities using different speech analysis technologies that meet certain criteria, and then analyze them in a targeted manner. That way, you can extract valuable information from previously unstructured data.

Open the respective module by clicking on the corresponding menu item in the navigation bar.

Basic functions

To provide the basic functions, the license package INSPIRATION_{neo} for Compliance Base license is available. The license package contains the following licenses:

License name	Number	Description
INSPIRATION _{neo} System	1 per system	License to use INSPIRATION _{neo} for Compliance.
INSPIRATION _{neo} for Compliance	1 per system	License to use INSPIRATION _{neo} for Compliance.
INSPIRATION _{neo} Sessions Module	1 per system	License for the Activities module.
INSPIRATION _{neo} Agents Module	1 per system	License for the Traders module.
INSPIRATION _{neo} Quality Management Module	1 per system	License for the modules: <ul style="list-style-type: none"> • Compliance Management module – Compliance Alarm module
INSPIRATION _{neo} User	11 users	License for named users to use INSPIRATION _{neo} for Compliance. With 1 license, 1 namely identified user can work on 1 workplace.
Recording Server	1 per system	License to use the recording system.

Tab. 1: Licenses for basic functions

compliance analysis

Depending on which compliance analysis methods are supposed to be used, one or several of the following licenses may additionally be required to carry out compliance analyses:

License name	Number	Description
INSPIRATION _{neo} Audio Analysis module	1 per system	License for the Compliance Analysis module.
INSPIRATION _{neo} Emotion Detection	1 per agent	License for using the method <i>Emotion detection</i> .
INSPIRATION _{neo} Keyword Spotting Analytics	1 per channel	License for using the method <i>Keyword spotting</i> .
INSPIRATION _{neo} Transcription Analytics	1 per channel	License for using the method <i>Transcription</i> .
Import & Export	1 per system	License for the data exchange of the compliance analysis.

Tab. 2: Licenses for compliance analysis



You are authorized to use the application INSPIRATION_{neo} for Compliance in the quantity indicated in the delivery papers. If all licenses are in use, additional users trying to log in will see a corresponding error message.



A user has been defined as an active INSPIRATION_{neo} for Compliance web activity displayed in the browser.

5 System requirements

5 System requirements



For basic information about the necessary hardware and software components refer to the installation manual *Installation requirements*.

6 User rights

INSPIRATION^{neo} for Compliance has been designed for several users and user groups. User rights can be assigned in a customized manner by granting or denying users or user groups access to different modules or functionalities. Any user right scenario can be recreated.

Upon logging in into INSPIRATION^{neo} for Compliance, users see exactly those modules and functionalities which have been shared with them by the administrator according to the defined user right scenario.

INSPIRATION^{neo} for Compliance additionally supports a predefined user right scenario which has been customized to the tasks of the traders. When administrators define users as trader, they automatically receive all predefined traders user rights. After logging in to INSPIRATION^{neo} for Compliance users have exactly those modules and functions at their disposal which they need for their job as trader. Modules and functionalities which are not required for traders are hidden automatically.



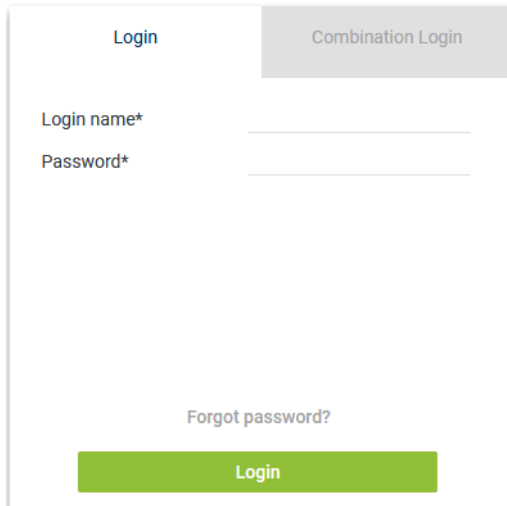
User rights are assigned in the application System Configuration. If an adjustment of the user rights becomes necessary, contact the system administrator.

7

Start application

Start the browser and enter the [URL](#) of the application server in the address bar. Your system administrator will inform you about the [URL](#) for accessing the application.

After you have entered the URL, the following login screen is displayed.



The login screen features two tabs at the top: 'Login' (active) and 'Combination Login'. Below the tabs are two input fields labeled 'Login name*' and 'Password*'. A link 'Forgot password?' is positioned above a green 'Login' button.

Fig. 1: Login screen

In general, there are the following login options:

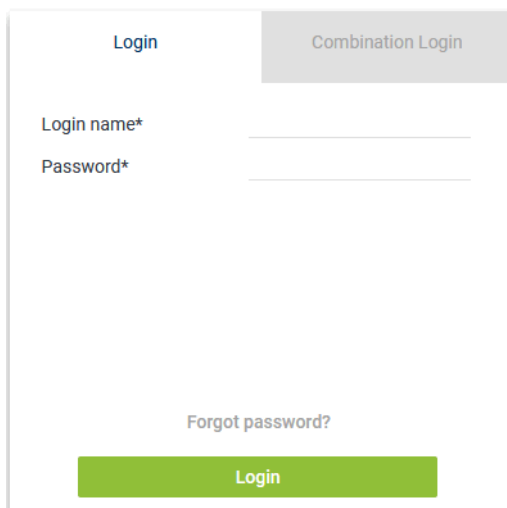
- Single login = normal user login, see [chapter "Single login", p. 11](#)
- Combination login, see [chapter "Combination login", p. 12](#).
- Login with two-factor authentication, see [chapter "Login with two-factor authentication", p. 13](#).



Your system administrator will tell you which login you have to use.

7.1

Single login



This is a duplicate of the login screen shown in Fig. 1, featuring the 'Login' tab, input fields for 'Login name*' and 'Password*', a 'Forgot password?' link, and a green 'Login' button.

Fig. 2: Single login

1. Enter your user name and the password.
 2. Click on the button -> *Login*.
- ⇒ The welcome screen of the application appears.

If you have forgotten your password and requested a new one upon your last login, the following window appears:

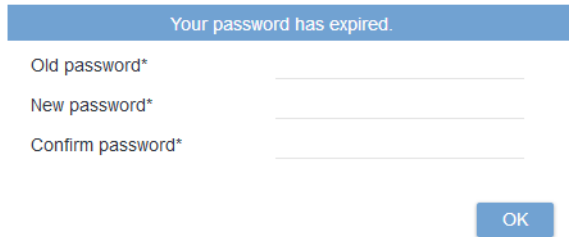


Fig. 3: Your password has expired

3. In the entry field *Old password*, enter your new password you have received by e-mail.
4. In the entry field *New password*, enter your new, modified password.
5. In the entry field *Confirm password*, repeat your new, modified password.
6. Click on the button *OK*.
 - ⇒ The welcome screen of the application appears.

7.2 Combination login

For safety reasons, it may be sensible to assign a combination user to a user. That way it can be ensured for instance that a supervisor only accesses recorded conversations when a member of the work council is present.

If a combination user has been defined, the actual user is only allowed to log in when the combination user has logged in, too. If entering the login data of a combination user is required, proceed as follows:

1. In the login window, click on the button *Combination Login*.

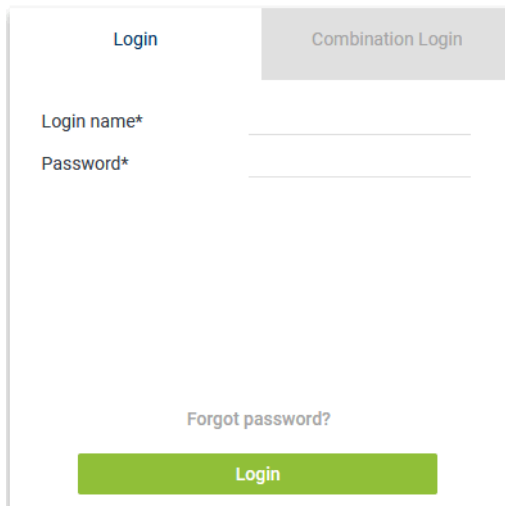
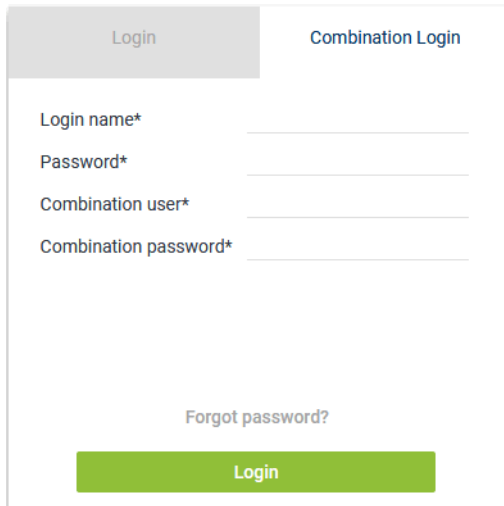


Fig. 4: Login

2. The window *Combination Login* appears.



The image shows a login interface with two tabs: 'Login' and 'Combination Login'. The 'Combination Login' tab is active. It contains four input fields: 'Login name*', 'Password*', 'Combination user*', and 'Combination password*'. Below these fields is a link 'Forgot password?'. At the bottom is a green 'Login' button.

Fig. 5: Combination login

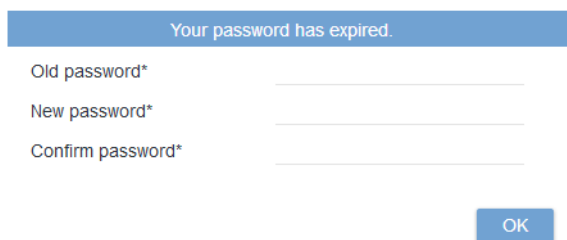
3. Enter your user name and your password as well as the user name and password of your combination user.

4. Click on the button -> *Login*.

⇒ The welcome screen of the application appears.

To change to the normal login, if required, click on the button *Login*.

If you have forgotten your password and requested a new one upon your last login, the following window appears:



The image shows a window titled 'Your password has expired.' It contains three input fields: 'Old password*', 'New password*', and 'Confirm password*'. At the bottom right is a blue 'OK' button.

Fig. 6: Your password has expired

5. In the entry field *Old password*, enter your new password you have received by e-mail.

6. In the entry field *New password*, enter your new, modified password.

7. In the entry field *Confirm password*, repeat your new, modified password.

8. Click on the button *OK*.

⇒ The welcome screen of the application appears.

7.3 Login with two-factor authentication

For maximum security and to protect the system against unauthorized access, an authentication app for two-factor authentication by providers such as Microsoft, Google or Apple can be used. After entering the [URL](#) and the default authentication by means of user name and password, the following login screen is displayed once to enter a code:

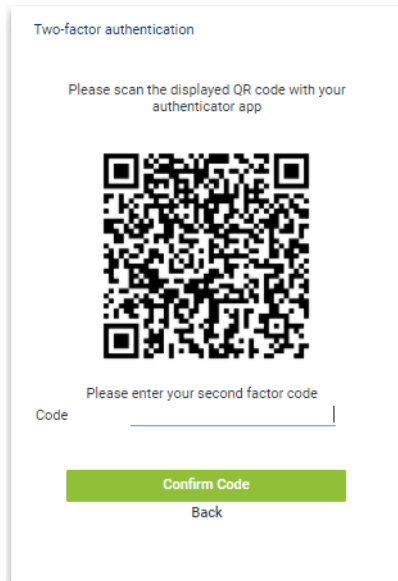


Fig. 7: Login two-factor authentication

1. Scan the QR code with the authentication app.
 2. Enter the six-digit code from the authentication app.
 3. To confirm the code, click on the button *Confirm Code*.
To cancel the authentication process, click on the button *Back*.
- ⇒ Once you have confirmed the code, the welcome screen of the application appears.



For subsequent logins, scanning the QR code becomes redundant: the deployed authentication app generates authentication codes in 10-second intervals which can be used to log in.

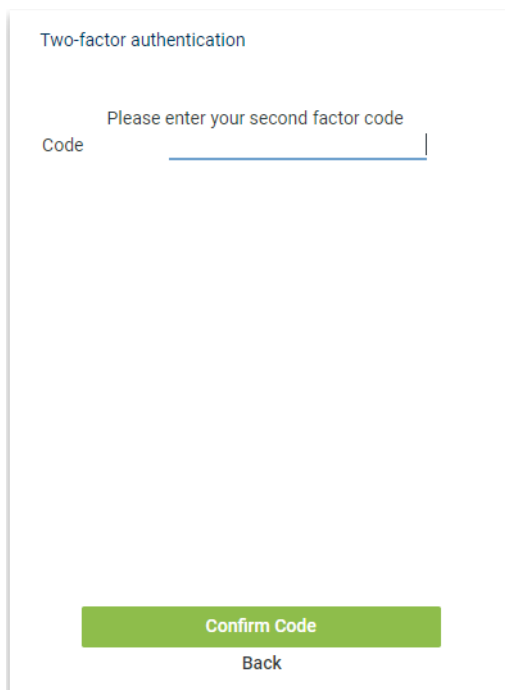


Fig. 8: Confirm code

7.4 OAuth2 login

Neo supports login via the open default protocol [OAuth](#) 2.0 for secure [API](#) authorization. If your system provider has configured [OAuth](#) for Neo, Neo opens the [OAuth](#) authorization website configured in the application System Configuration in the default browser upon starting where users must then log in to Neo.

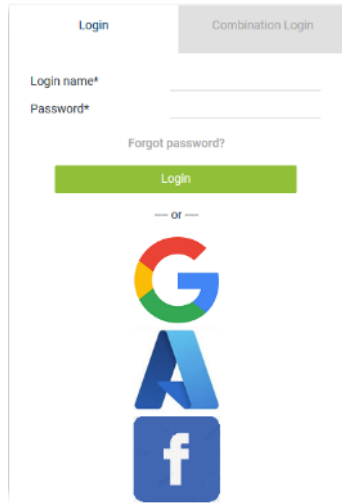


Fig. 9: OAuth login

1. Enter your user name and the password.
2. Click the button *Login*.
3. Alternatively click on the icon of the OAuth provider with which you would like to log in to Neo.

Depending on the OAuth provider, additional windows might follow in which you have to confirm that you agree with the process. In this case, follow the individual prompts on the screen:

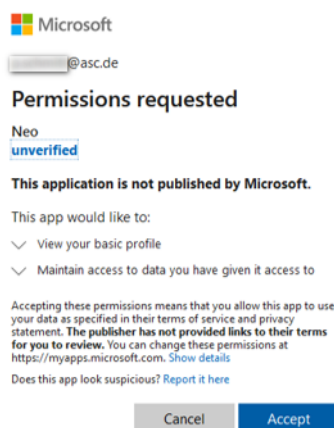


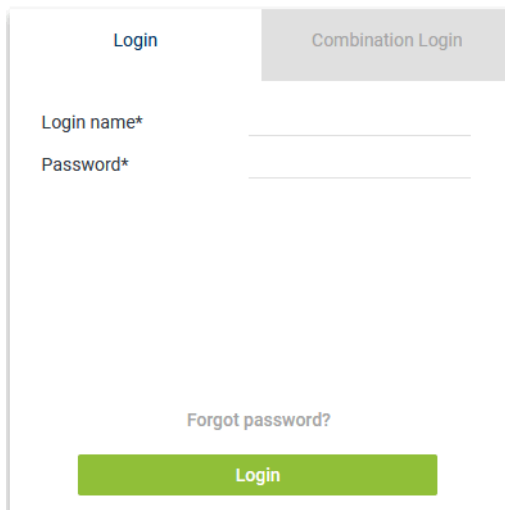
Fig. 10: Confirmation required (example Azure)

4. In the example of Azure, confirm the process by clicking on the button *Accept*.
 5. On the following login screen of the respective OAuth provider, login with your login data.
- ⇒ The welcome screen of the application appears.

7.5 Request new password

If you have forgotten your password, you can request a new one via the function *Forgot password?* in the different login windows.

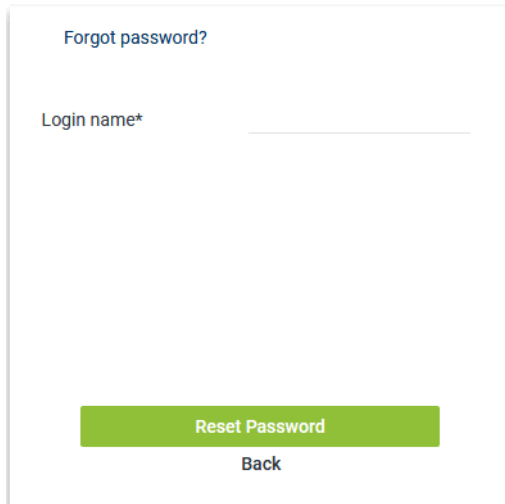
1. Click on the text *Forgot password?*



The screenshot shows a login window with two tabs: 'Login' (active) and 'Combination Login'. Below the tabs are two input fields labeled 'Login name*' and 'Password*'. At the bottom, there is a link 'Forgot password?' and a green 'Login' button.

Fig. 11: Login window

2. The window *Forgot password?* appears.



The screenshot shows the 'Forgot password?' window. It has a title 'Forgot password?' and a single input field labeled 'Login name*'. At the bottom, there is a green 'Reset Password' button and a 'Back' link.

Fig. 12: Request password

3. Enter your user name.
4. Click on the button -> *Reset Password*.
⇒ You will receive an e-mail containing your new password.



For this function, your administrator has to have configured a corresponding e-mail server. Contact your system administrator if you do not receive an e-mail after this step.

5. To return to the login, click on the text *Back*.

7.6

Accept terms of use

The system provider of the tenant may subject the usage of the application to the user's previous consent to customer-specific terms of use. To do so, there is a dedicated entry field in the Tenants module of the application System Configuration. If your system provider has made use of this opportunity, a page with the customer-specific terms of use is displayed after logging in:

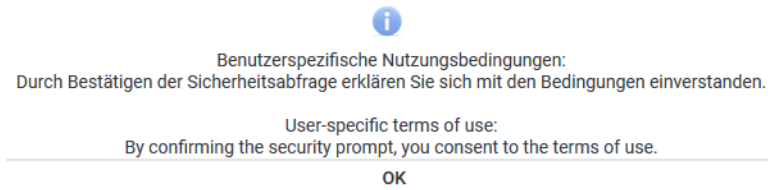


Fig. 13: Accept terms of use (example)

To log in to the application, accept the terms of use by clicking on the button *OK*.



Upon a successfully logging in, the Activities module is displayed by default. The navigation bar allows switching between the individual function modules.

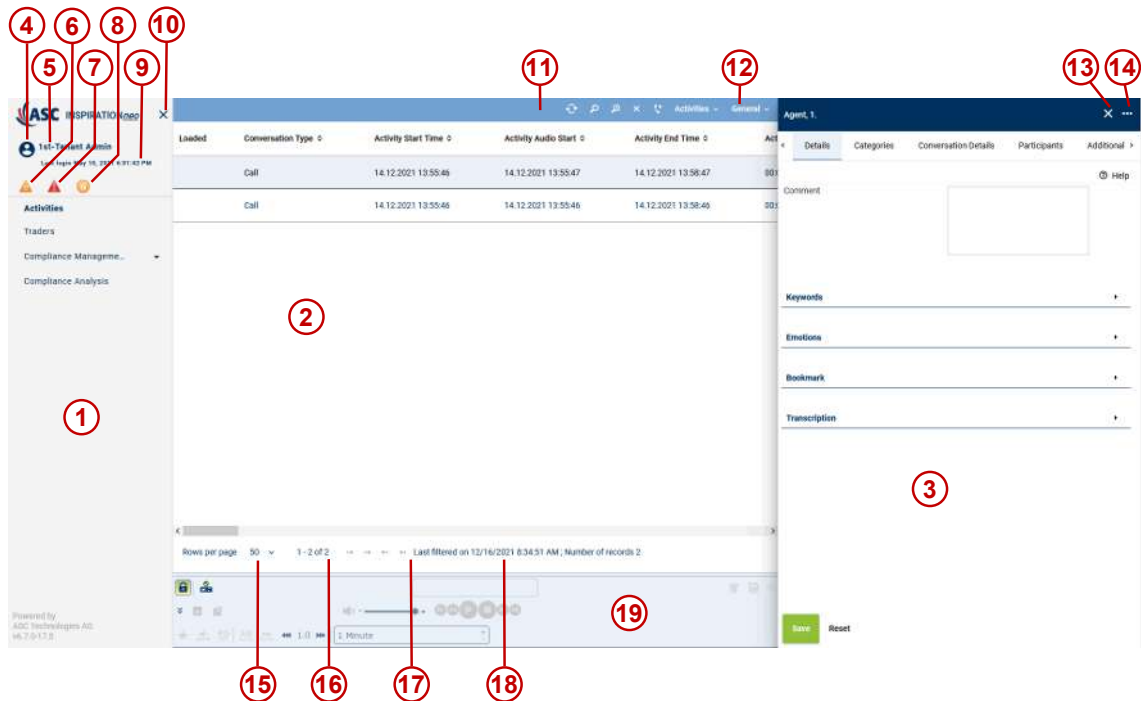

















Fig. 14: Welcome screen

1	Navigation bar	Contains the individual menu items (function modules), see chapter "Navigation bar", p. 20.
2	Main view	Contains an overview of the most important information about the selected module, see chapter "Main view", p. 22.
3	Detail view	Contains detailed information about as well as functions and setting options of the element selected in the main view, see chapter "Detail view", p. 25.
4	 (Logged in as).	Change Password Menu item which allows changing your password, see chapter "Change password", p. 29.
		Change Replay Server Menu item which allows changing the replay server, see chapter "Change replay server", p. 40.
		Navigation Bar Menu item which allows changing the way the navigation bar is displayed, see chapter "Navigation bar", p. 20.
		Language Menu item which allows selecting the language of the user interface, see chapter "Change language", p. 28.
		Info Menu item which allows calling up information about the version of the software, see chapter "Call up info", p. 28.
		Logoff Menu item which allows logging off from the application.
5	User	Name of the logged-in user
6	 (Your last logoff was not correct.	Indicated that you have not logged off correctly when leaving the application the last time. Click on the warning icon to delete the error message. Always use the logoff icon to log off from the application.


	<i>Please use the logoff button.)</i>	
7	 (Your latest login has failed. Please use the correct password.)	Shows that the latest attempt to log in to the application was not successful. Click on the warning icon to delete the error message. Always use the correct password to log in to the application.
8		Shows the date when your password expires. To hide the icon, click on the button <i>Okay</i> .
9	Last login date	Shows the date of the last login.
10	 (Collapse)	Icon which allows collapsing or reducing the displayed areas.
	 (Expand)	Icon which allows expanding or opening the displayed areas.
11	Toolbar	<p>Contains icons and menu items with functions for the elements in the main view. It depends on the selected module which icons and menu items are displayed.</p> <p>The following icons are available in all toolbars:</p> <p> or  (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. 31. The icon  (Search) is displayed whenever the search has been adjusted by means of a filter.</p> <p> <i>Reset Search</i> Resets all manually entered search criteria. The search is started without manual filter settings.</p> <p>The separate icons and menu items are explained in the descriptions of the respective modules.</p>
12	<i>General</i>	<p><i>Print</i> Menu item which allows printing the table of the main view, see chapter "Print", p. 30.</p> <p><i>Adjust Table</i> Opens the window <i>Table Configuration</i>, see chapter "Adjust table", p. 24.</p> <p><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. See chapter "Call up online help", p. 30.</p> <p><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. See chapter "Call up online help", p. 30.</p>
13	 (Collapse)	Icon which allows closing the displayed area of the detail view.
14	 (Collapse)	Icon which allows collapsing or reducing the displayed area of the detail view so that only this icon remains visible at the right margin.
	 (Expand)	Icon which allows expanding or opening the displayed area of the detail view again.

15		Shows the number of rows per page In the drop-down list, select how many rows per page are supposed to be displayed. You can choose 10, 20, 50 or 100 rows per page.
16	Range of the displayed sets of data	Shows the range of the displayed sets of data on the current page of the main view.
17		Buttons which allow browsing the pages of the main view.
18	<i>Last filtered on ...; Number of records: ...</i>	Shows the time of the last filtering (search) and the number of data sets according to the current list of search results in the main view. This information is not available in all modules.
19		Shows the Replay module for controlling the replay.



If the session has been inactive for a longer period of time, the application is closed automatically. Default value for the timeout: 30 minutes. The value can be adjusted by the administrator, see administration manual *System Configuration - User Management*.



To close the application, always use the logoff function.
 (Logged in as) > Logoff.

8.1

Navigation bar

The individual modules of the application are displayed in the navigation bar.

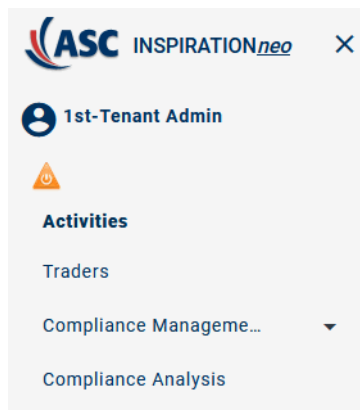




Fig. 15: Navigation bar (example)

Modules which contain sub-menus are marked with an arrow icon.

Click on the module name to display an overview including a description of all sub-menus. Click on the arrow icon to display or hide the sub-menus of a module.

You can hide the navigation bar by clicking in the icon  and expand it again by clicking on the icon .

8.1.1 Short description of the modules

Module name	Submenus	Description
activities		<ul style="list-style-type: none">• Searching and replaying recorded activities• Analysis of activities
traders		<ul style="list-style-type: none">• Displays trader data• Offers the possibility to change existing data
compliance management		<ul style="list-style-type: none">• Creating, implementing, and managing different compliance management procedures
	compliance alarms	<ul style="list-style-type: none">• Defining and assigning compliance alarms
compliance analysis		<ul style="list-style-type: none">• Creating and managing compliance analysis jobs• Searching for keywords, emotions or patterns in recorded activities• Converting audio data to text

Tab. 3: Module descriptions



It depends on your function rights which of the described modules are available.

8.2 Main view

The main view offers an overview of the data administrated in the module.

The content of the main view depends on the selected module. A description of the module-specific content can be found in the manual of the respective module.

In general, the main view consists of a table which contains the data sets of the selected module.

In the most modules, you can change the sort sequence and order of the columns arbitrarily, see [chapter "Change sort sequence", p. 22](#) and [chapter "Adjust table", p. 24](#). In these modules, you can adjust the column width by clicking on the right margin of the field containing the column headline, holding the mouse key down, and dragging the column to the required width.

In addition, the main view contains a toolbar with all functions which can be used for the elements of the main view. The different toolbars are explained in the descriptions of the respective modules.

At the bottom edge of the main view, most modules offer buttons which allow you to browse the pages of the main view and indicate which page you are on.

51 - 100 of 298 ◀ ◀ ▶ ▶

Fig. 16: Changing pages

◀	Jumps to the first page of the main view.
◀◀	Jumps to the previous page of the main view.
51 - 100 of 298	Shows the range of the displayed sets of data on the current page of the main view.
▶▶	Jumps to the next page of the main view.
▶	Jumps to the last page of the main view.

In other modules, you can navigate through the main view by means of the scrollbars.

8.2.1 Change sort sequence

In their column headlines, some tables contain arrows which indicate the sort sequence and which allow you to change the sort sequence:

↕	No sorting
▼	Descending sort sequence
▲	Ascending sort sequence

Tab. 4: Main view - change sort sequence

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

8.2.2 Filter table view

Below their column headlines, some tables contain fields which allow you to filter the table entries.

Employee Number ↕	First Name ↕	Last Name ↕	Login Name ↕	Date of Entry ↕
1000	10.	Agent		
900	9.	Agent		

Fig. 17: Filter table view (example)

1. If you would like to filter only the content of one individual column, enter the character string you would like to filter by in the filter field of this column.
⇒ The table only displays the entries in this column which contain the entered character string.

Example:

You would like to display only employees whose employee ID starts with the digits 95; consequently you enter the numerical sequence 95 in the filter field of the column *Employee ID*:

Agents ▾ General ▾				
Employee Number ▾	First Name ▾	Last Name ▾	Login Name ▾	Date of Entry ▾
10				
1000	10.	Agent		
100	1.	Agent		

< >

Rows per page 50 ▾ 1 - 2 of 2 << >> >>>

Fig. 18: Filter table view - 1 criterion

2. If you would like to filter the content of several columns at the same time, enter the character string you would like to filter by in all the filter fields of these columns.
⇒ The table only displays the entries which match all entered filter criteria.

Example:

You would like to display only employees whose employee ID starts with the digits 95 and whose last name begins with the letter H; consequently you enter the numerical sequence 95 in the filter field of the column *Employee ID* and the character H in the filter field of the column *Last name*:

Agents ▾ General ▾				
Employee Number ▾	First Name ▾	Last Name ▾	Login Name ▾	Date of Entry ▾
10		A		
1000	10.	Agent		
100	1.	Agent		

< >

Rows per page 50 ▾ 1 - 2 of 2 << >> >>>

Fig. 19: Filter table view - several criteria

8.2.3

Adjust table



The changes made only apply for the logged-in user. They are a matter of personal settings.

This function allows adjusting the order of the columns in the table of the main view.

- Click on the menu item *General > Adjust Table* in the toolbar of the main view.

⇒ The window *Table Configuration* appears.

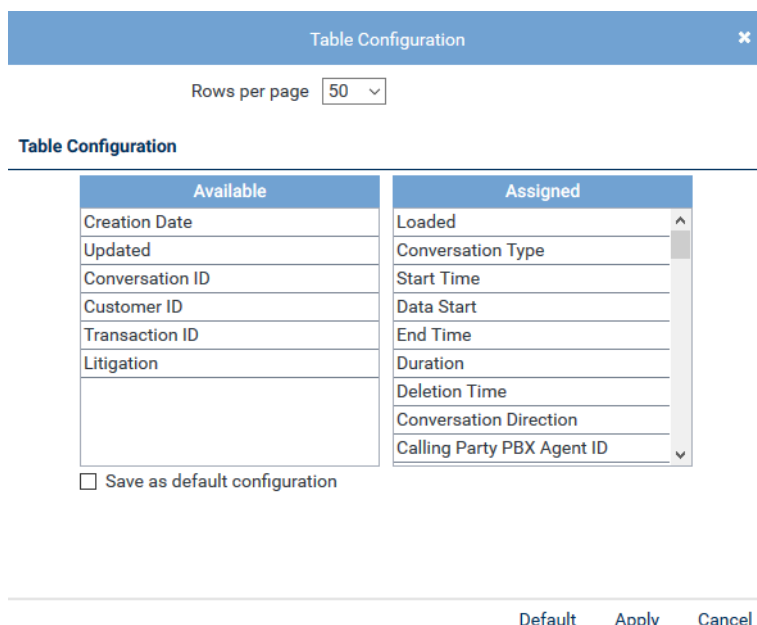



Fig. 20: Adjust table of the main view (example)


The different columns can be moved within a list or from one list to the other by dragging them to and dropping them in the required position. Double-clicking on one column moves the column to the end of the opposite list.

The following functions are available:

Rows per page 50 ▾	Number of rows per page.
Save as default configuration	<p>If this check box is activated, the table configuration is saved as default for the employees of the tenant upon applying the changes.</p> <p>NOTICE! The option is only displayed if you have the respective right for this function.</p>
Default	Resets the configuration in the window <i>Table Configuration</i> to the default settings and closes the window.
Apply	<p>Saves all changes and closes the window <i>Table Configuration</i>.</p> <p>If the check box <i>Save as default configuration</i> has been activated, a dialog window appears upon applying the changes. In the dialog window click on the button <i>Yes</i> or <i>No</i>.</p> <p>Yes</p> <p>The current table configuration is saved as default for the tenant. All table configurations existing for this module are deleted from the database.</p> <p>When opening the module, the employees of the tenant see the new table configuration that has been saved.</p>

	<p><i>No</i></p> <p>The current table configuration is saved as default for the tenant. When opening the module, the employees of the tenant see the new table configuration that has been saved if no other individual configuration has been saved.</p>
	<p>Closes the window <i>Table Configuration</i> without applying the changes.</p>

In the list *Available*, all columns which are currently not used are displayed. In the list *Assigned*, all columns used in the main view are displayed. The entries arranged from top to bottom correspond to the columns arranged from left to right in the main view.

2. Configure the column view according to your requirements.
3. In the drop-down list, select how many rows per page are supposed to be displayed.
⇒ You can choose 10, 20, 50 or 100 rows per page.
4. To apply the changes in the current view, click on the button *Apply*.
To discard the changes and close the window, click on the icon .

8.2.3.1 Change column width of the table

To change the column width of the table in the main view individually, proceed as follows:

1. Left-click on the column of the header, hold the mouse key down, and drag the column to the respective width.

8.3 Detail view

The detail view contains detailed information about as well as functions and setting options of the selected element of the main view.

The content of the detail view depends on the selected module. A description of the module-specific content can be found in the manual of the respective module.

The different detail views may be divided in tabs and group fields.

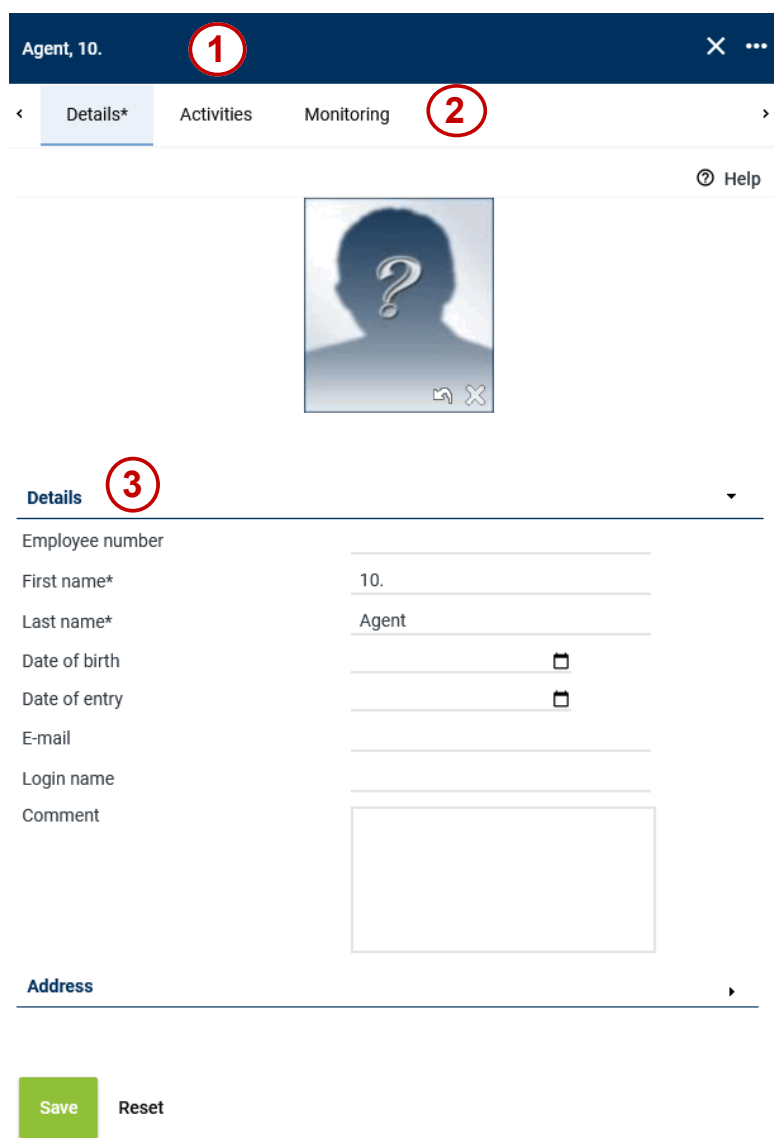


Fig. 21: Detail view (example)

1	Description of the selected element
2	Tabs
3	Group field

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

To open a group field, click on the arrow ▶ next to the name of the group field.

To hide a group field, click on the arrow ▼ next to the name of the group field.

When making changes, you can change tabs without buffering without risking the loss of the changes you have made.

The fields marked with " * " are mandatory fields. These fields have to be filled out.

To save changes, click on the button *Save*.

To discard the changes which have not yet been saved, click on the button *Reset*.

8.3.1 Text entry fields

There are 2 different fields for text entries:

Single-row entry fields

Maximum text length: 255 characters

Login name

A single horizontal text entry field with a thin grey border.

Fig. 22: Single-row entry field (example)

Multi-row entry fields

Maximum text length: 1500 characters

Comment

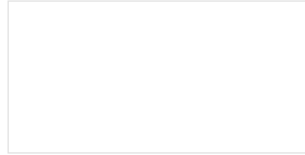
A rectangular text area with a thin grey border, intended for multi-line input.

Fig. 23: Multi-row entry field (example)

9 General functionalities

The functionalities described below are available in general or in most modules.

9.1 Change language


- Click on the menu item  (*Logged in as*) > *Language* in the user interface.
⇒ The following window appears:




Fig. 24: Change language

- Select the language from the drop-down list. Only languages that you have installed during the installation can be selected.
⇒ The texts of the user interface are displayed in the selected language.






Once you have thus selected a language, it will be saved as default language for you as logged-in user for whenever you log in to Neo again.

9.2 Call up info

- Click on the menu item  (*Logged in as*) > *Info* in the user interface.
⇒ The window *Installed Product Versions* appears. It contains information about the version of the Neo software.

The following information is displayed:

Column Name	Description
<i>Server Name</i>	Name of the server. Click on the arrow  to display the history. In the history, the servers have been sorted by installation date beginning at the top with the first installation date.
<i>Connected</i>	The icon  indicates that the core is used in the current application.
<i>Product Version</i>	Information about the current product version
<i>EC Version</i>	Information about the current Enterprise Core version
<i>Last Start</i>	Date and time of the last system start
<i>Last Stop</i>	Date and time of the last system stop
<i>Installation Date</i>	Date and time of the installation Click on the arrow  in the column <i>Server Name</i> to display the information.

Tab. 5: Information

Installed Product Versions						
Server Name	Connected	Product Version	EC Version	Last Start	Last Stop	Installation Date
CTI-01		6.0.0-0.0	60.1.0	11/19/2018 10:32:09 AM	11/19/2018 10:34:55 AM	
REC-01	✓	6.0.0-10.0	60.16.0	02/11/2019 7:31:46 AM	02/07/2019 10:42:18 AM	
REC-01		6.0.0-0.0	60.1.0			11/12/2018 10:47:18 AM
REC-01		6.0.0-1.0	60.2.0			11/19/2018 11:25:43 AM
REC-01		6.0.0-4.0	60.5.0			12/05/2018 11:17:53 AM
REC-01		6.0.0-8.0	60.10.0			01/09/2019 12:09:12 PM
REC-01		6.0.0-9.0	60.15.0			01/29/2019 12:30:27 PM
REC-01		6.0.0-10.0	60.16.0			02/07/2019 10:51:29 AM

[Additional Information](#) [Close](#)

Fig. 25: Installed Product Versions

- To obtain additional information about the system, click on the button [Additional Information](#) in the bottom right corner of the window.

⇒ The window *Additional Information* appears. It contains information about the license.

Additional Information

License Information

System ID: 2322891

Order ID: 66666666

Close


Fig. 26: Additional Information

9.3

Change password



If you use the function *Last Call Repeat*, the password must consists of numbers only.

- Click on the menu item  *Logged in as* > *Change Password* in the user interface.
- ⇒ The following window appears:

Change Password

Old password*


New password*

Confirm password*

OK


Reset


Fig. 27: Change password

- Enter your old password.
- Enter your new password and confirm it.
- To save the change of the password, click on the button **OK**.
To delete the entries without saving them, click on the button **Reset**.
To cancel the change of the password, click on the icon  in the top right corner of the window.

Once you have successfully saved the changed password, you have to enter the new password upon opening the application the next time.

9.4 Change navigation bar

1. Click on the menu item  (*Logged in as*) > *Navigation Bar* in the user interface.
⇒ The window *Change Navigation Bar* appears.
2. Activate the check box to collapse the navigation bar.
⇒ The setting is saved permanently. Upon logging in the next time, the application is opened with this settings.

You can expand the navigation bar again by clicking on the icon  (Expand) in the top left corner.

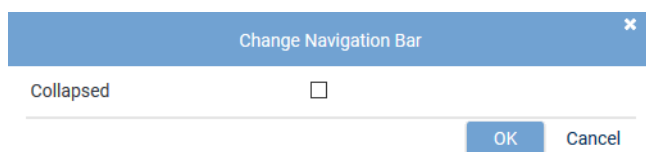



Fig. 28: Change navigation bar

9.5 Call up online help

An online help is available at different locations in the system. You can call up the online help as follows:

Menu item / Button	Location	Result
General	Toolbar of the main view	Select whether you would like to open the <i>General Help</i> or the <i>Module Help</i> .
	Detail view / Additional window	A topic-specific help opens referring to the tab or the additional window you are currently viewing.

Tab. 6: Call up online help

By clicking on the menu item *General*, you can select one of the following options:

<i>General Help</i>	The help about the general functions of the application is opened.
<i>Module Help</i>	A description of the module you are currently viewing opens.

There are the following options to navigate in the online help:

- Navigation bar on the left of the window
- Contents (via the menu item *Contents* in the header)
- Cross reference to additional information at the bottom of the page

9.6 Print

This function allows printing the table of the main view.

- ✓ Print default in the browser under *File > Page Setup*: Page orientation has been set to landscape.
 - ✓ Additionally when using the browser Mozilla Firefox:
Print default in the browser under *File > Page Setup*: Scaling has been set to 110 %.
1. In the menu *General* of the toolbar, click on the menu item *Print*.

- ⇒ The print preview appears.
- 2. To cancel the printing process, click on the button *Cancel*.
To continue the printing process, click on the button *Print*.
- ⇒ The window *Print* appears.

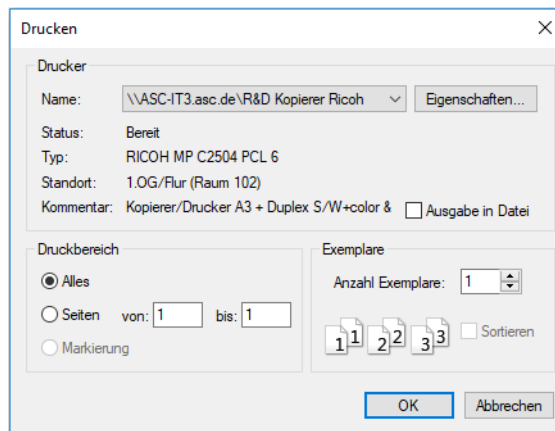


Fig. 29: Print (example)

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

9.7

Search

The function *Search* allows search for selected criteria systematically. Every search query can be saved to be used again.



The icon  is displayed whenever the search has been adjusted by means of a filter.



Activated search attributes as well as the category they belong to are highlighted in bold. This makes it easy to spot whether and where the search filter has been adjusted even when the menu has been collapsed.

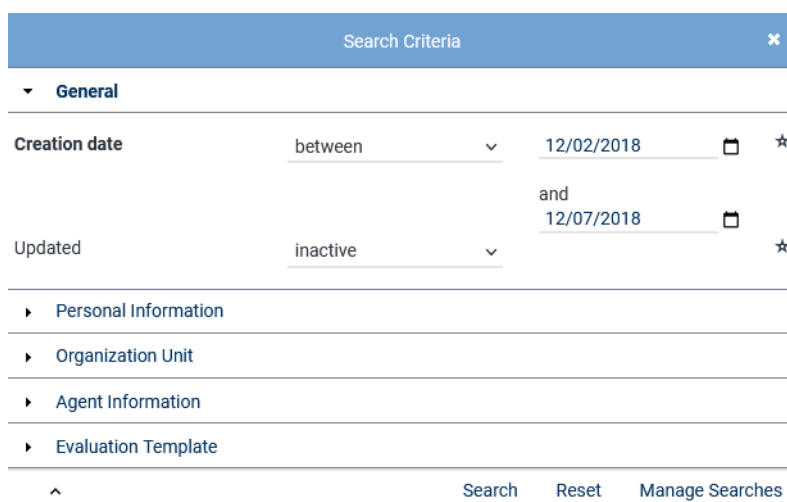




Fig. 30: Search criteria (example)

The following functions are available:

	Shows the content of the search category.
	Hides the content of the search category.

☆	Adds the search criterion to the list of favorites.
★	Removes the search criterion from the list of favorites.
^	Hides the content of the window.
▼	Shows the content of the window.
Search	Starts the search.
Reset	Resets all manually entered search criteria.
Manage Searches	Enables you to save and load search procedures.
×	Closes the window <i>Search Criterion</i> .

9.7.1

Search criteria




For the search, different search criteria are available which are divided in several search categories. It depends on the respective module which search criteria are available.

For all search criteria, you can select different comparison parameters from a drop-down list. In general, the following comparison parameters are available:

<i>inactive</i>	The search criterion is ignored for the search.
<i>between</i>	A search is made for all objects within the entered range. The initial and the final values are included in the search result.
<i>Period (indiv.)</i>	A search is made for all objects in the selected period of time. In the entry field, enter the period in the following format: <i>month-day-hours-minutes</i> . As an example, the entry <i>03-05-15-20</i> means that a search is made for conversations from the last 3 months, 5 days, 15 hours, and 20 minutes.
<i>Period</i>	A search is made for all objects in the selected period of time. Different periods are available. The period starts with the current date. <i>Last week</i> thus refers to the past 7 days, <i>last month</i> to the past 30 days starting today.
<i>equal</i>	A search is made for all objects which exactly match the entered value.
<i>not equal</i>	A search is made for all objects which do not match the entered value.
<i>greater or equal</i>	A search is made for all objects the value of which is greater than or equal to the entered value.
<i>greater than</i>	A search is made for all objects the value of which is greater than the entered value.
<i>smaller or equal</i>	A search is made for all objects the value of which is smaller than or equal to the entered value.
<i>smaller than</i>	A search is made for all objects the value of which is smaller than the entered value.
<i>starts with</i>	A search is made for all objects which start with the entered value.
<i>doesn't start with</i>	A search is made for all objects which do not start with the entered value.
<i>ends with</i>	A search is made for all objects which end with the entered value.
<i>doesn't end with</i>	A search is made for all objects which do not end with the entered value.
<i>contains</i>	A search is made for all objects which contain the entered value.
<i>doesn't contain</i>	A search is made for all objects which do not contain the entered value.
<i>in</i>	One or several values are entered which are supposed to be searched for. The search displays all entries which match one of these values.

<i>not in</i>	One or several values are entered which are supposed to be searched for. The search displays all entries which do not match one of these values.
---------------	--

Depending on the search criterion, there are different options to enter or select comparison values:

- If only one entry field is displayed, enter the value directly into the entry field via the keyboard.
- If a drop-down list is displayed, select the value from the drop-down list.
- If a rotating field is displayed, click on one of the arrows to increase or decrease the value.
- If several values can be entered, enter the value directly in the entry field via the keyboard and click on the icon  on the right of the entry field.
To remove a value from the list, click on the icon  on the right of the value.
- If different values are displayed in combination with a check box, select a value by marking the respective check box.
- If entering a date is required, enter the date directly via the keyboard or via the icon .

9.7.2 Run a search

1. Click on the menu item *General > Search* in the toolbar.
 - ⇒ If no saved searches exist, the window *Search Criteria* appears directly, see [Fig. 32, p. 34](#).
 - ⇒ If saved searches exist, the window *Search* appears.

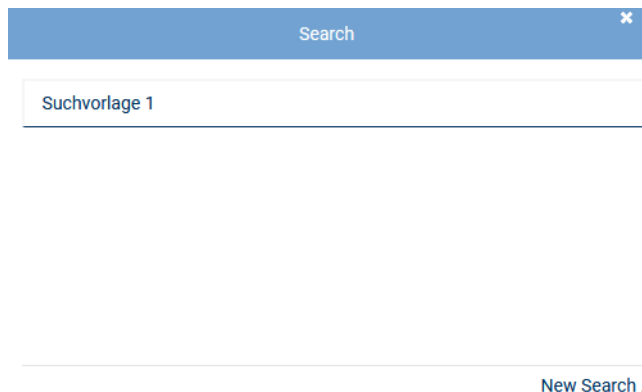


Fig. 31: Window Search (example)

2. If you would like to use one of the saved searches, click on the line with the name of the saved search.
 - ⇒ The search is initiated directly.
 - ⇒ The found results are displayed in the main view.
3. If you do not want to use a saved search but define new search criteria instead, click on the button *New Search*.
 - ⇒ The window *Search Criteria* appears.

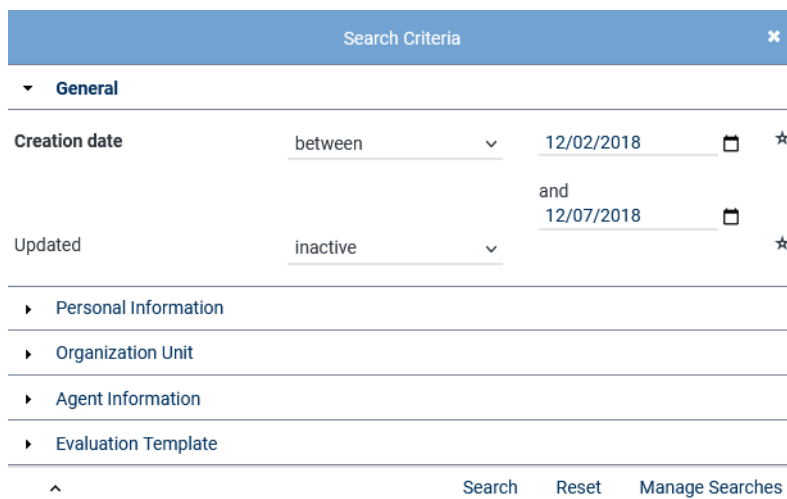



Fig. 32: Window Search Criteria (example)

4. Set the respective search criteria, see [chapter "Search criteria", p. 32](#).
5. Click on the button *Search*.
 - ⇒ The found results are displayed in the main view.
6. To save the set search criteria, click on the button *Manage Searches* > menu item *Save as...*, see [chapter "Save search", p. 34](#).
 To reset all manually entered search criteria, click on the button *Reset*.
 To close the window *Search Criteria*, click on the icon .

9.7.3 Save search

You can save previously defined search settings.

The names of the saved search settings are displayed directly upon calling up the search function, see [chapter "Run a search", p. 33](#).

1. Set the respective search criteria, see [chapter "Search criteria", p. 32](#).

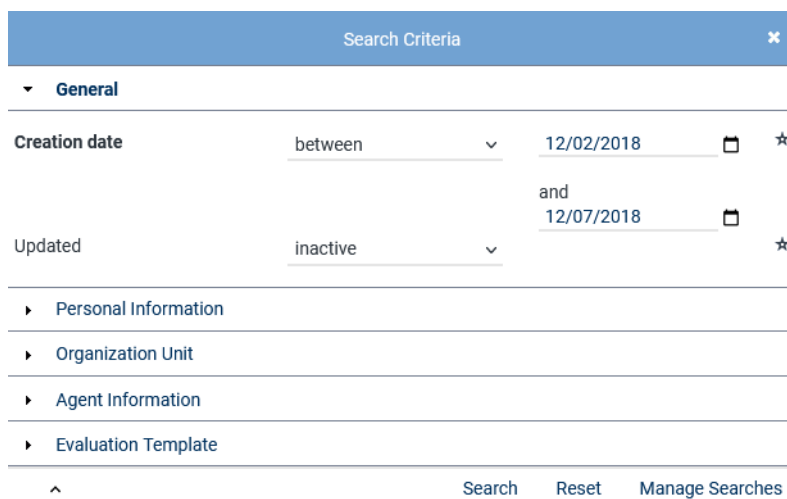
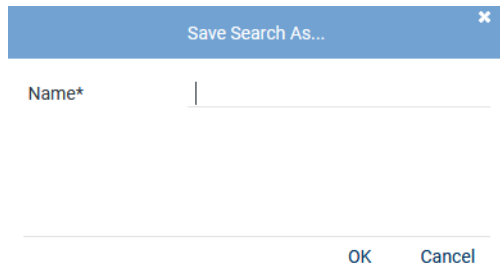


Fig. 33: Enter search criteria (example)

2. Click on the button *Manage Searches* > menu item *Save as...*
3. Enter a name for the search in the entry field *Name*.



Save Search As... ✕

Name*

OK Cancel

Fig. 34: Save search

- To save the search, click on the button *OK*.
To cancel the saving process, click on the button *Cancel*.

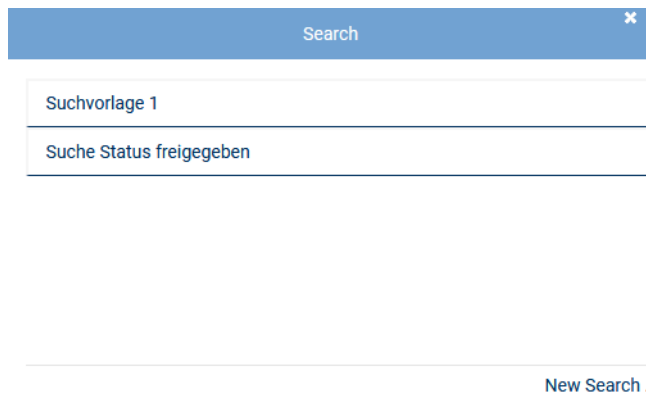


The fields marked with " * " are mandatory fields. These fields have to be filled out.

9.7.4

Edit saved search

- Click on the menu item *General > Search* in the toolbar.
⇒ The window *Search* appears.



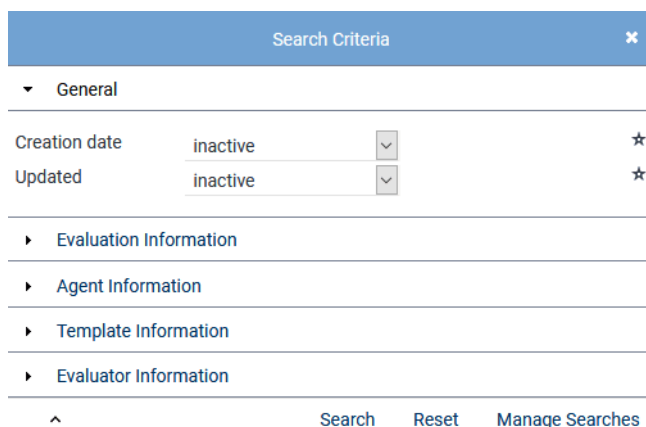
Search ✕

Suchvorlage 1
Suche Status freigegeben

New Search ..

Fig. 35: Window Search (example)

- Click on the button *New Search*.
⇒ The window *Search Criteria* appears.



Search Criteria ✕

▼ General

Creation date	inactive	▼	★
Updated	inactive	▼	★

▶ Evaluation Information

▶ Agent Information

▶ Template Information

▶ Evaluator Information

^ Search Reset Manage Searches

Fig. 36: Window Search Criteria (example)

- Click on the button *Manage Searches > menu item Saved Searches*.
⇒ The window *Saved Searches* appears.

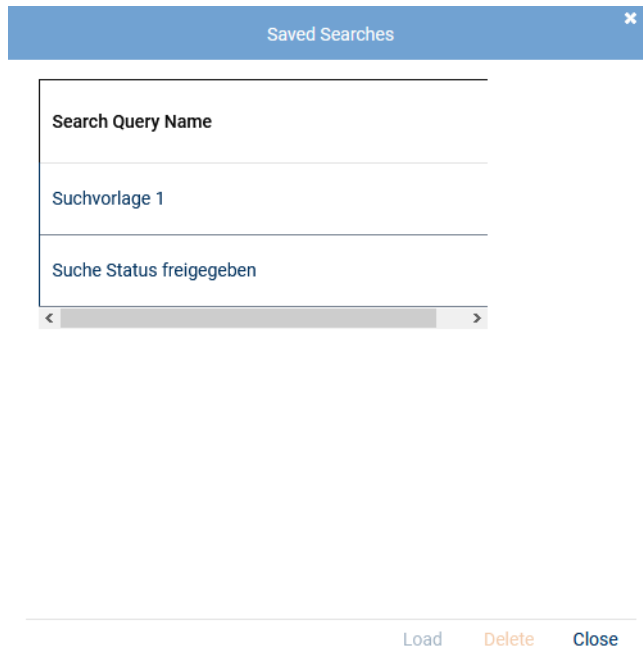


Fig. 37: Saved Searches (example)

4. Select the saved search you would like to edit.

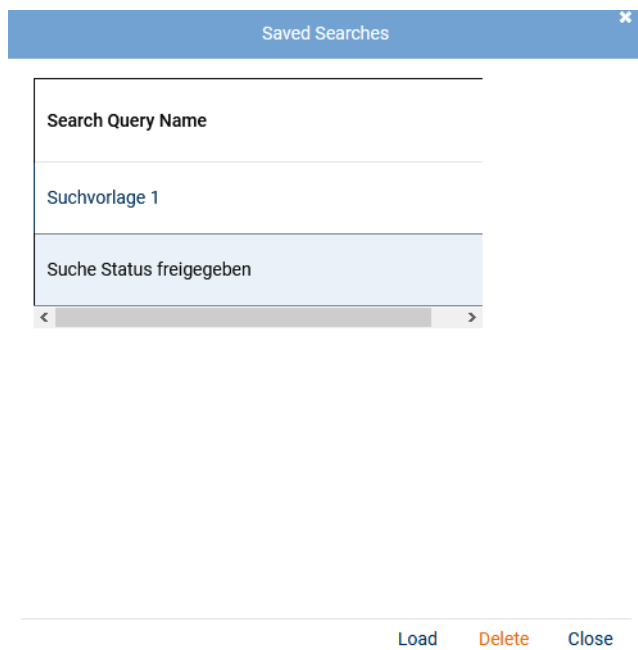


Fig. 38: Edit saved search (example)

5. Click on the button *Load*.
 - ⇒ The saved search settings are loaded in the window *Search Criteria*.

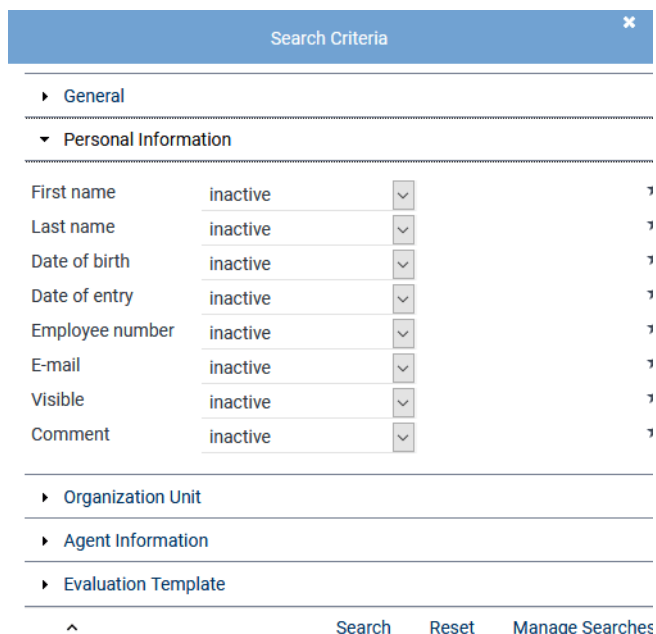


Fig. 39: Search Criteria (example)

6. Adjust the search criteria according to your requirements.
7. To save the edited search under the same name, click on the button *Manage Searches* > menu item *Save*.
To save the edited search under a different name, click on the button *Manage Searches* > menu item *Save as...*, see [chapter "Save search", p. 34](#).

9.7.5 Search via saved search

If you have saved search settings (see [chapter "Save search", p. 34](#)), you can quickly search for the saved search criteria.

1. Click on the menu item *General* > *Search* in the toolbar.
⇒ The window *Search* appears.

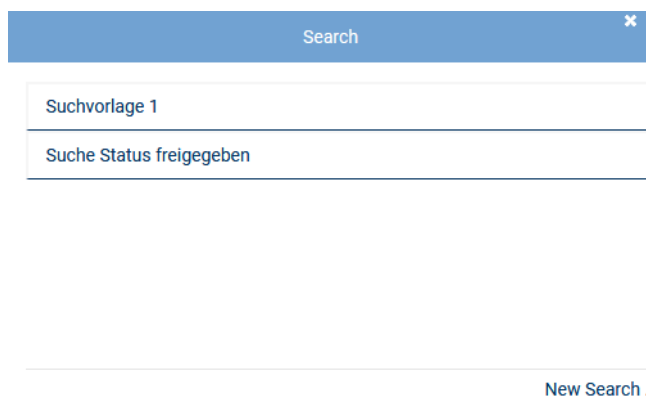
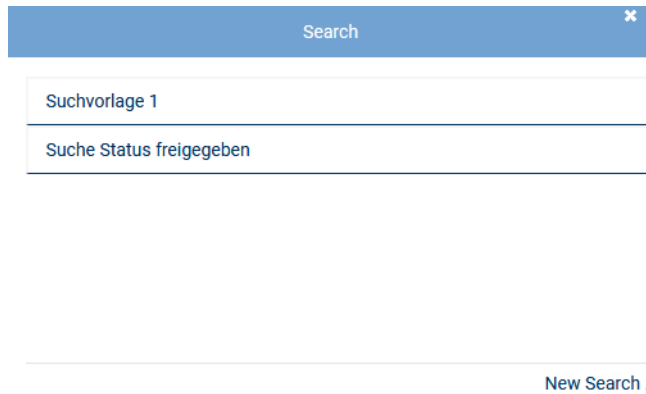


Fig. 40: Search (example)

2. Click on the name of the saved search you would like to use for the search.
⇒ The found results are displayed in the main view.

9.7.6 Delete saved search

1. Click on the menu item *General* > *Search* in the toolbar.
⇒ The window *Search* appears.

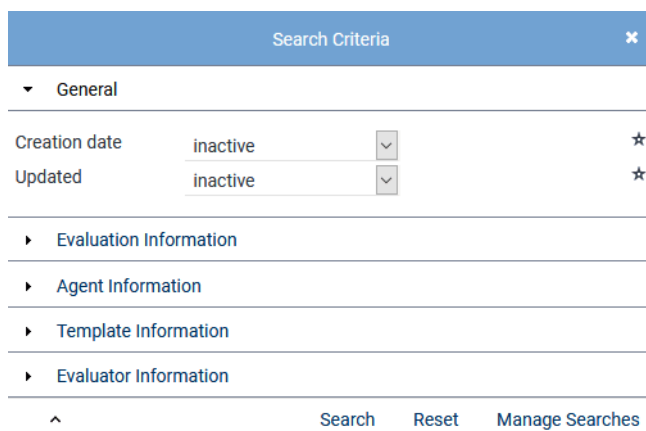


Search	
Suchvorlage 1	
Suche Status freigegeben	

New Search ..

Fig. 41: Window Search (example)

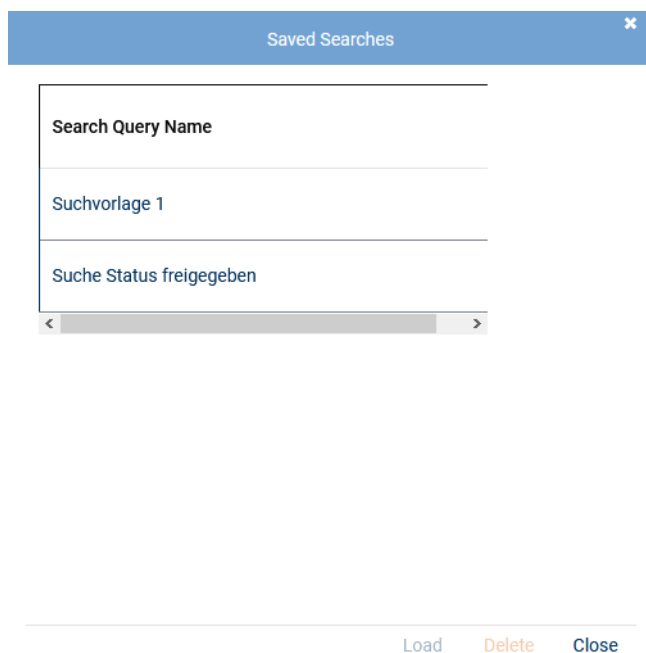
- Click on the button *New Search*.
⇒ The window *Search Criteria* appears.



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

Fig. 42: Window Search Criteria (example)

- Click on the button *Manage Searches* > menu item *Saved Searches*.
⇒ The window *Saved Searches* appears.



Saved Searches	
Search Query Name	
Suchvorlage 1	
Suche Status freigegeben	

Load Delete Close

Fig. 43: Saved Searches (example)

- Select the search you would like to delete.

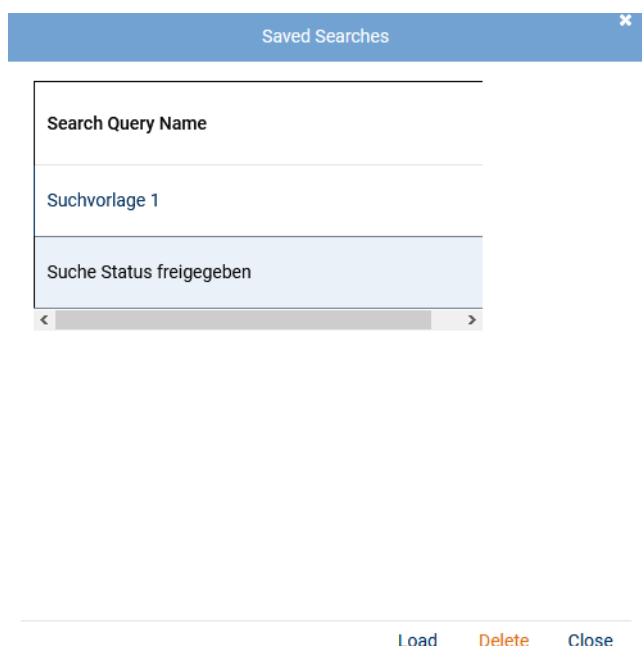


Fig. 44: Delete saved search (example)

5. Click on the button *Delete*.
6. To really delete the search, confirm the security prompt.

9.7.7 Create search favorite

You can tag individual search criteria as favorites. Search favorites are displayed additionally in the upper area of the window *Search Criteria* and thus continue to be visible even if all criteria areas have been closed.

1. Click on the menu item *General > Search* in the toolbar.
 - ⇒ If no saved searches exist, the window *Search Criteria* appears.
 - ⇒ If saved searches exist, the window *Search* appears.
Open a saved search, see Edit saved search, or open the window *Search Criteria* by clicking on the button *New Search*.
2. Set the respective search criteria, see [chapter "Search criteria", p. 32](#).

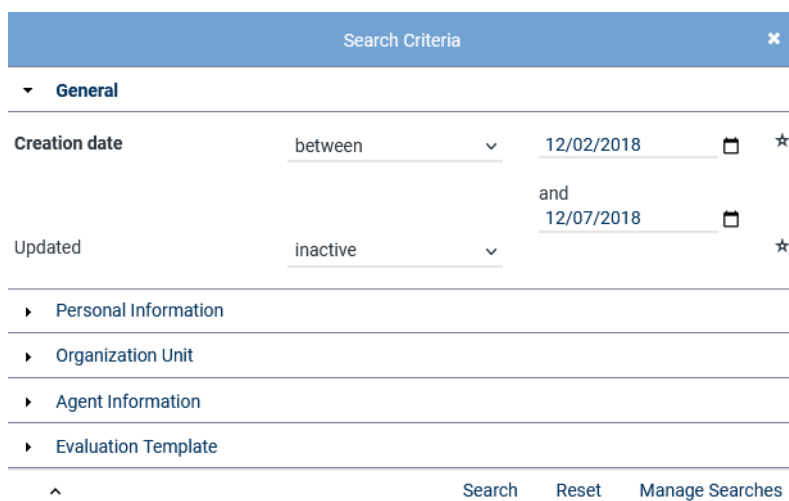
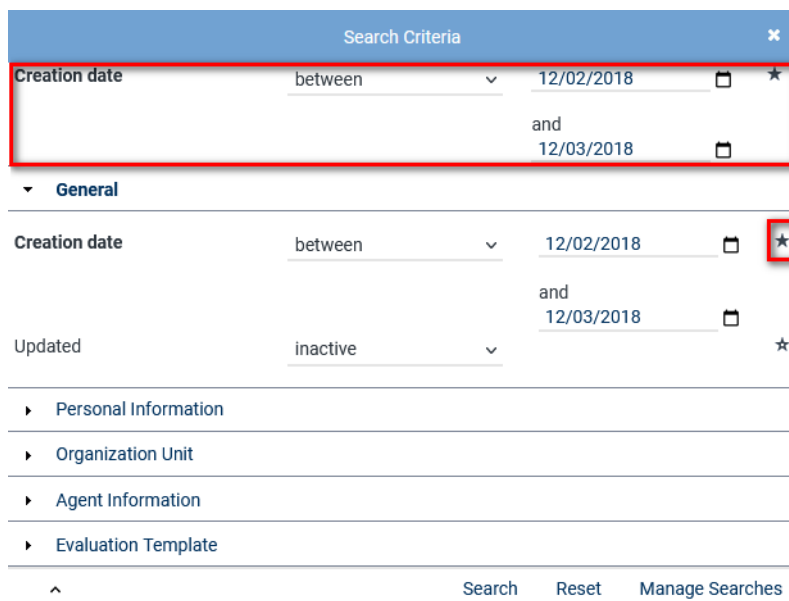


Fig. 45: Enter search criteria (example)

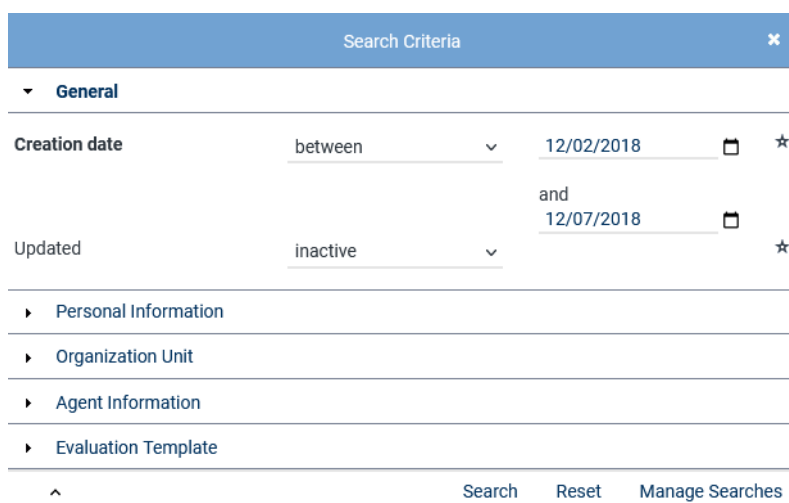
3. To tag one criterion as favorite, click on the icon ★.
 - ⇒ The criterion tagged as favorite is displayed additionally in the upper area of the window and marked with the icon ★.



The screenshot shows a 'Search Criteria' window with a blue header and a close button. Under the 'General' tab, there are two criteria. The first criterion, 'Creation date', is set to 'between' 12/02/2018 and 12/03/2018. This criterion is highlighted with a red rectangle and has a star icon in its right margin, indicating it is a favorite. The second criterion, 'Updated', is set to 'inactive'. Below the criteria are expandable sections for 'Personal Information', 'Organization Unit', 'Agent Information', and 'Evaluation Template'. At the bottom are buttons for 'Search', 'Reset', and 'Manage Searches'.

Fig. 46: Search criterion tagged as favorite (example)

4. If you do not want to use a criterion tagged as favorite as a favorite anymore, click on the icon ★ .
 - ⇒ The criterion which is now no longer tagged as favorite is marked with the icon ★ .
 - ⇒ The criterion is no longer displayed in the upper area of the window.




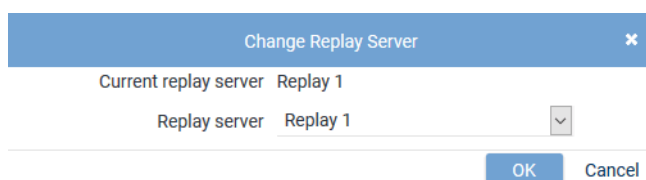
This screenshot is similar to Fig. 46, but the 'Creation date' criterion is not a favorite. It is marked with an empty star icon (★) in its right margin. The 'Updated' criterion remains 'inactive'. The rest of the interface, including the expandable sections and bottom buttons, is identical to the previous figure.

Fig. 47: Search criterion not tagged as favorite (example)

9.8

Change replay server

1. Click on the menu item  (Logged in as) > Change Replay Server in the user interface.
 - ⇒ The following window appears:



The 'Change Replay Server' dialog box has a blue header with a close button. It shows 'Current replay server' as 'Replay 1'. Below this, there is a label 'Replay server' followed by a drop-down menu currently showing 'Replay 1'. At the bottom are 'OK' and 'Cancel' buttons.

Fig. 48: Change replay server

2. Select the replay server from the drop-down list.

3. To save the change, click on the button *OK*.
To discard the change, click on the button *Cancel*.

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Glossary

API

Application Programming Interface

OAuth

OAuth is an open standard for access delegation, commonly used as a way for Internet users to grant websites or applications access to their information on other websites but without giving them the passwords. (Source: Wikipedia 19th August 2020)

URL

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