GENESYS™

Recording, Quality Management and Speech Analytics User Manual

Administer Users

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Administer Users

Managing users includes creating new user accounts, assigning roles, groups, and partitions to users, managing user passwords, maintaining additional user information, and deactivating or deleting existing accounts.

The collection of information and group associations assigned to a user is interactioned a user profile. This section explains how to create user accounts and manage user profiles.

Create a New User Account

1. In the top right corner of the screen, select **Administrator/your name > Administer Users**.

   If you are not an administrator your name will appear instead of the term Administrator. The **Administer Users** screen opens and displays a list of the existing user accounts.

2. Click **New** ✚.

   A blank **Add Profile** screen opens.

3. Fill in the fields as follows:

Field	Description
Active	Select this check box to make the account active. An account must be active for the user to log into it.
User Login	Enter a username for the user.
Authentication	Select **SpeechMiner** if you want the username and password to be managed by SpeechMiner and stored in SpeechMiner's database. Select **Windows** if the user will log into SpeechMiner using the same username and password they use to log into Windows. The fields required to configure the selected option are displayed.
Old Password	This field is not relevant to new accounts. This field only appears if SpeechMiner is selected under Authentication.
New Password	Type a password for the account. This field only appears if SpeechMiner is selected under Authentication.
Verify Password	Type the password for the account again to ensure it was typed correctly. This field only appears if SpeechMiner is selected under Authentication.

Field	Description
User must change password at next logon	Select this option to require the user to change their password the next time they log into SpeechMiner. This field only appears if SpeechMiner is selected under Authentication.
Windows Domain	Type the name of the Windows domain in which the user's account is managed. This field only appears if Windows is selected under Authentication.
User Roles	Select the user roles to associate with the account. These roles define the permissions the user will have in SpeechMiner. For additional information, see Managing Roles. If roles appear in the list but are not active, you do not have the permissions required to assign these roles to users.
User Groups	Select the groups to associate with the account. Each group represents a set of work groups and/or partitions that identify which interaction data the user will be able to access. For additional information, see Managing Groups.
User Partitions	If you want to enable the user to access interaction data from additional work groups and/or partitions that are not included in their groups, select them here.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
Title	Enter the user's title.
Organization	Enter the organization the user works for.
Phone	Enter the user's phone number.
Email	Enter the user's e-mail address.
Home Page	Enter the address of any page in the SpeechMiner web interface to make that page the user's homepage. Enter the address in the following format: /pages/[page location] You can copy the page address from the end of the Address field of the browser when the page is open. For example, if you want to use the Templates page as the homepage, and the address of the New Search page is http://myserver/speechminer/pages/ui/#/reports/templates, you would remove the base of the address (enter http://myserver/speechminer) and enter pages/ui/#/reports/templates. Note: If this field is left blank, the last view the user had open in their Views page is opened when they log in.
Comments	Enter any additional comments.
Mapping	If the user is an interaction-center agent, select the user's name in the interaction center's recording system. If the user is an interaction-center manager, select the name of the work group they manage. You can select the name or

Field	Description
	work group in one of the following ways: • In the text field, begin typing the name of the agent or work group. A drop-down list of names that contain the combination of letters you type appears. Keep typing until you see the name, and then click it to select it. • Click [...]. A list of work groups opens. Click a work group to select it, or expand the relevant work group and then click the name of the agent to select it. Note: Mapping SpeechMiner users to interaction-center agents makes it possible to create a Saved Report for the "current user." This means that a single Saved Report can be run by different users to retrieve report data about themselves, or their subordinates. For additional information, see Creating a Custom Report.
Send Email Notification	If you want to send the new user an e-mail message telling them that their account is open and explaining how to access it, select this check box. The e-mail message is sent to the address specified in the **Email** field.

4. Click **Save Changes**.

   The new account is created. The **Edit Profile** screen closes and the **Administer Users** screen is displayed. If you selected to send the user an e-mail notification, the e-mail is sent.

See also

Edit User Profile
Manage Groups
Manage Roles
SMART User Manual

Filter the User Accounts

You can filter the list of existing users in a number of ways to help you find the accounts that interest you.

1. In the top right corner of the screen, select **Administrator/your name > Administer Users**.

   If you are not an administrator your name will appear instead of the term Administrator.

The **Administer Users** screen opens and displays the list. The list includes a summary of each user's profile.

2. Perform one or more of the following:

- If you want to filter by user name, type a letter or combination of letters in the **Name** field. User accounts that do not include the specified combination of letters will be hidden from the list.

- If you want to filter by role, open the **Roles** drop-down list and select a role or roles you want to include in the list.

- If you want to filter by group, open the **Groups** drop-down list and select the group or groups you want to include in the list. (For additional information about using the Multi-Select box, see Defining Search Criteria.)

The filter is activated and accounts that do not match the filter settings are not displayed.

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Modify User Profiles

You can modify user profiles in one of two ways:

- Open an individual user's profile and modify it. For example, you could change a user's password.

- Make global changes to selected profiles using the **More** menu. For example, you could add a role to a number of users' accounts.

Modify an individual user profile

1. In the **Administer Users** screen, in the **Login** column, click the user's name.

   The **Edit Profile** screen opens and displays the user's current profile.

2. Modify the profile as required. For information about the various fields in the screen, see **Creating a New User Account** tab.

   The **User Login** and **Authentication** fields cannot be modified. You may not be able to modify other fields if you do not have permissions to do so.

3. Click **Save Changes**.

   The profile is updated. The **Edit Profile** screen closes and the **Administer**

Users screen is displayed.

Make global changes to selected profiles

1. In the **Administer Users** screen, select the check box associated with each user profile you want to modify. To select all of the user profiles, select the check box at the top of the column.

2. Above the list, click **More**.

   The **More** drop-down menu opens.

3. Select the desired option, as follows:

Option	Description
Mark as Active	Activates the selected accounts.
Mark as Inactive	Deactivates the selected accounts. The users will not be able to log into their accounts. Inactive accounts can be reactivated later as necessary. When you click **OK**, you will be able to choose whether to delete all the user's saved searches, reports, and scheduled reports, or just to stop all scheduled reports.
Add to Role(s)	Opens a list of the roles that exist in the system. Select the roles you want to add to the users' profiles, and then click **Close** to close the list.
Add to Group(s)	Opens a list of the groups that exist in the system. Select the groups you want to add to the users' profiles, and then click **Close** to close the list.
Remove from Role(s)	Opens a list of the roles that exist in the system. Select the roles you want to remove from the users' profiles, and then click **Close** to close the list.
Remove from Group(s)	Opens a list of the groups that exist in the system. Select the groups you want to remove from the users' profiles, and then click **Close** to close the list.

4. Click the **OK** button to the right of the **More** field.

   The changes are implemented. If you selected **Mark as Inactive**, before you click **OK**, you are prompted to choose whether to delete all the user's saved searches, reports, and scheduled reports, or just to stop all scheduled reports.

5. Select the desired action, and then click OK.

See also

Edit User Profile
Manage Groups
Manage Roles

Delete Users

You can delete existing user accounts as necessary. When an account is deleted, all saved searches, reports, and scheduled reports created by the user are deleted. If you want to keep these items, but you do not want the user account to be accessible, you can deactivate the account (see Modifying User Profiles above). When an account is deactivated, the user cannot log into it, but the profile is saved and saved searches and reports can be retained. The account can be reactivated later on as necessary.

To delete user accounts

1. In the **Administer Users** screen, select the check box associated with the user account you want to delete.

2. Above the list, click **Delete** (🗑). You are prompted to confirm that you want to delete the selected accounts.

3. Click OK.

   The accounts are deleted.

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