NICE PUBLIC SAFETY SOLUTIONS

NICE INFORM USER ADMINISTRATION USER GUIDE

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Important Notice

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1 Welcome

The NICE Inform User Administration application enables administrators to set up system-wide and user-by-user security for NICE Inform.

Each and every user of NICE Inform requires a security account, which is used to control access to all logging channels available in the system.

NOTE: Users **DO NOT** require individual accounts to be set up on each of the underlying logging systems.

Saving and canceling changes

The User Administration application consists of many tabbed pages. Many of these pages have a **Save** and a **Cancel** button.

The **Save** button commits the changes you have just made. If you try and navigate from the page without saving you are asked if you wish to save the changes. If at any time you wish to change any settings back as they were, click the **Cancel** button prior to clicking the **Save** button.

Application privileges

To use the User Administration application, you **MUST** have the required privilege allocated to you (refer to Application privileges (see page 40)) NICE Inform applications). If not, the User Administration option will not be displayed in the Application selector bar when you log in.

Security principles

This section outlines the important security principles available when using the NICE Inform User Administration application.

Profiles

A profile defines the applications and features that are available for a user. A profile is a way of defining the roles users will perform such as a Dispatcher or a Disclosure Officer (refer to Creating a new profile (see page 49)).

Users are given permission to use certain NICE Inform applications and application features by attaching a profile to them (refer to Attaching a profile to a user (see page 52)).

NOTE: Without an attached profile a user **CANNOT** use any NICE Inform application.

User groups and resources

User groups can be created and then users can be added to that group (refer to Creating a new user group (see page 30)).

Users are given access to recordings in the system by attaching resources to user groups (refer to Attaching resources to a user group (see page 35)). Resources represent the different sources of recordings such as channels, talkgroups or extensions. Multiple resources can be attached to a user group.

NOTE: Making a user a member of the Administrators group assigns them access to every resource and every user in the system.

Managers

Making a user a Manager of a group assigns them access to the other users of the group and sub-groups so they can be administered.

For help making a user a manager of that group, refer to Editing a user group (see page 31).

2 Navigation panel

NOTE: Specific terminology is used when navigating the tree pane. For help with this terminology, refer to Tree structure terminology (see page 4).

The Navigation panel consists of a tree pane which has the following nodes:

- **Organization** - a fixed node for system wide settings.
- **All users** - a fixed node displaying all users groups in the system. Nodes in this section consist of:
  - **Non-active Users** - a fixed group containing those who have been deleted from the system.
  - **Administrators** - a fixed group containing those who have privileges to view all resources and users defined in the system.
  - **User Groups** - consists of groups and sub-groups. When a group or sub-group is selected, the members of that group are listed in the right hand pane.
- **Profiles** - a fixed node that lists the profiles that have been created. A single profile is attached to a user to specify which application privileges that person has been granted by their System Administrator.
- **Search results** - a fixed node showing the results of the last search.

User security

The top level of the Organization node is concerned with security aspects of User Administration. When the Organization node is selected, tabbed pages are available for security configuration (refer to System Security (see page 7)).

2.1 Button bar

There are a number of available buttons within User Administration for selection:

Table 2-1: User Administration button bar

Button	Description
	New - displays a drop down menu that allows you to add new users, new user groups and new profiles. The button remains inactive until you select a node or branch that allows you to perform this function.
	Delete - deletes the current tree pane selection. You are required to confirm the action. The button remains inactive until you select a node or branch that allows you to perform this function.
	Move - allows you to move the selected user group and any associated sub-groups from one node to another (refer to Moving a user group (see page 37)). The button remains inactive until you select a node or branch that allows you to perform this function.
	Search - allows you to enter search text in order to search for users, groups and profiles (refer to Searching for users, user groups and profiles (see page 54)).
	Refresh data - refreshes the tree structure and any lists displayed in the right hand pane.

2.2 Adding and removing items

Adding and removing items (e.g. resources, users and fields) to and from selected lists is frequently used within NICE Inform User Administration.

NOTE: The following options may differ when adding and removing items.

- To add items to the list:

1. Highlight the required item in the Available list.
2. Click the **Add >** button. The item is moved to the Selected list.
3. Repeat for each required item.

NOTE: To move all items to the Selected list, click the **Add All >>** button.

- To remove items from the Selected list:

1. Highlight the required item in the Selected list.
2. Click the **< Remove** button. The item is moved to the Available list.
3. Repeat for each item required.

NOTE: To move all items from the Selected list, click the **<< Remove All** button.

Additional Operations

- If you wish to select all but one or two items, click the **Add All >>** button to move all items to the Selected list, then remove the items not required.
- The **Quick Search** facility enables you to find the required item. Enter the required text in the box and click **Go**. The search returns all items containing that text as part of its name. The search is **NOT** case sensitive.

2.3 Tree structure terminology

A tree structure is used throughout NICE Inform to aid in your navigation of the application suite and is required to perform further functions. Using the Resource Groups section in System Administration as an example, there are several terms used when navigating the tree:

NOTE: Refer to the table below for a key to each feature.

Figure 2-1: Navigating the tree example

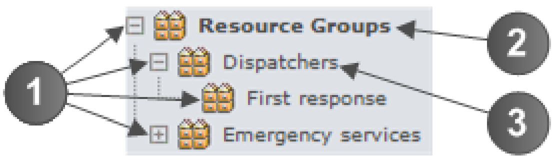

Table 2-2: Tree structure terminology

Feature number	Description
1	Nodes
2	Parent
3	Child/sub group

- **Node** - everything in the tree is classed as a node.
- **Parent** - the top level node e.g. **Resource Groups**.
- **Child** (or sub group) - the node below its parent.
- A child (or sub group) can also be a parent as well. Using the example above, the Dispatchers node is a child of the **Resource Groups** node but is also a parent of the **First response** node.
- To expand a node, click the ⊞ button alongside the node.
- To collapse a node, click the ⊟ button alongside the node.

3 User Administration functions

The main actions involved in User Administration are:

NOTE: Settings do not take effect until the user next logs in.

Security

- Setting password details (see page 7) - enables you (at the Organization level) to set system password details.
- Setting security (see page 9) - enables you (at the Organization level) to set system security details.
- Setting workstation permissions (see page 11) - enables you (at the Organization level) to set workstation permissions.

Administration

- Adding a new user to the system (see page 14) - enables you to add a new user to the system
- Importing users from a CSV file (see page 26) - enables you to import users into the system from a provided CSV template.
- Importing users from an Active Directory domain (see page 28) - enables you to import user from a Microsoft Active Directory domain.
- Creating a new user group (see page 30) - enables you to add a new user group.
- Adding user group members (see page 36) - enables you to add users to a created user group.
- Creating a new profile (see page 49) - enables you to create a new custom profile with the applications and associated privileges that you require.
- Attaching a profile to a user (see page 52) - enables you to attach a profile to a system user.
- Removing a profile from a user (see page 53) - enables you to remove a profile from a system user.
- Attaching a user to a profile (see page 38) - enables you to attach a system user to a created profile.
- Removing a user from a profile (see page 39) - enables you to remove a system user from a profile.
- Attaching resources to a user group (see page 35) - enables you to attach system resources to created user groups.

Searching

- Searching for users, user groups and profiles (see page 54) - enables you to find users, user groups, profiles and descriptions.

4 System Security

The following system security conditions apply:

- NICE Inform security is based around applications and resources.
- All security is implemented on the NICE Inform Server.
- All access to any Application or Resource is verified on each request to the NICE Inform Server.
- Users are given permission to use NICE Inform applications by attaching a profile to them. The profile defines the applications and features the user can have. Without the profile, the user cannot do anything.
- A license is required for each application and feature to be enabled in a user's profile.
- Users are given access to recordings by attaching resources to user groups. Resources represent different sources of recordings, such as: channels, talkgroups, agents, extensions, etc.

4.1 Setting password details

NOTE: Setting password details at the Organization level affects **ALL** users of NICE Inform the next time they log in.

Specific terminology is used when navigating the tree pane to set password details. For help with this terminology, refer to Tree structure terminology (see page 4).

All the options within the **Passwords** page do **NOT** affect users that have derived from a Microsoft Windows Active Directory domain. Passwords settings are configured within Active Directory.

To set password details at the Organization level, in the tree pane, select the **Organization** node and click the **Passwords** tab. The **Passwords** page is presented.

The page is divided into the following sections:

Account Username

The following option is available:

- **Account username** - set the minimum number of characters required by either entering the number into the available text box or by using the provided up/down arrows.

Maximum Password Age

The following options are available:

- Select one of the following:
  - **Password never expires** - all users passwords never expire,
  - **Expires in** - set the maximum number of days that the password expires by either entering the number into the available text box or by using the provided up/down arrows.

Minimum Password Age

The following options are available:

- Select one of the following:
  - **Change anytime -** users can change their password at any time,
  - **Allow change after -** set the minimum number of days before users can change their password, either by entering the number into the available text box or by using the provided up/down arrows.
- **User cannot change password** - check this box and all users **CANNOT** change their password.

New User Password

The following option is available:

- **Change password at next login** - check this box and all users **HAVE** to change their password the next time they login.

Password History

- Select one of the following:
  - **Do not save password history** - all users **CANNOT** use the same password that they have used before.
  - **Remember last** - set the number of previous passwords that are stored in the history either by entering the number into the available text box or by using the provided up/down arrows. A user **CANNOT** reuse a password that is stored in their history.

NOTE: The Remember last feature is specific to individual users **ONLY**.

Password Checking

- The following options are available:
  - **At least -** set the minimum number of characters that has to be entered when creating and changing passwords either by entering the number into the available text box or by using the provided up/down arrows.
  - **Strict password checking -** check this box and strict passwords rules are applied (refer to *Password Rules* in *Getting Started*).

NOTE: This **ONLY** applies to new passwords and/or changing a password and **NOT** existing passwords.

Administrator Password Checking

This option is **ONLY** for users attached to a profile that has either (or both) System Administration or User Administration applications. Here you can set an enhanced password length check for these type of users.

- The following options are available:
  - **At least** - set the minimum number of characters that has to be entered when creating and changing passwords for System Administration and User

Administration users either by entering the number into the available text box or by using the provided up/down arrows.

- **Administrator password checking** - check this box and Administrator password checking feature is applied for NICE Inform User Administration and NICE Inform System Administration users (refer to *Changing your password* in *Getting Started*). If you leave this option unchecked, the password length as set by the **Password checking** option above is used.

NOTE: Once enabled, Administrator password checking applies to new passwords and to all existing users the next time they log in to NICE Inform.

Forbidden Passwords

The following options are available:

- **Add forbidden password** - click the **Add** button to add a new forbidden password. The **Add Forbidden Password** dialog is presented.
  - Enter the forbidden password and click the **OK** button. When creating a new password, users will **NOT** be able to use any forbidden passwords.
- **Edit forbidden password** - select an existing entry and click the **Edit** button. The **Edit Forbidden Password** dialog is presented, showing the selected password.
  - Edit the existing password with the new one and click the **OK** button.
- **Delete forbidden password** - select an existing entry and click the **Delete** button to remove it from the list. Click the **OK** button from the resulting dialog to confirm the action.

Once you have configured the password settings, click the **Save** button.

4.2 Setting security

NOTE: Setting security details at the Organization level affects **ALL** users of NICE Inform the next time they log in.

Specific terminology is used when navigating the tree pane to set security details. For help with this terminology, refer to Tree structure terminology (see page 4).

The options within the **Auto Logout**, **Login Message**, **General sections** and the **Display last login information** option within the **Accounts** section do **NOT** affect users that have derived from a Microsoft Windows Active Directory domain.

To set security details at the Organization level, in the tree pane, select the **Organization**  node and click the **Security** tab. The **Security** page is presented.

The page is divided into the following sections:

Accounts

The following options are available:

- **Deactivate login ID after** - the user account will be deactivated if either of the following conditions is met:

- The required number of days of inactivity by either entering the number of days into the available text box or by using the provided up/down arrows.
- The required number of attempts when entering successive invalid passwords by either entering the number of attempts into the available text box or by using the provided up/down arrows. Once configured, set one of the following:
  - **Always -** the number of invalid login attempts can occur over an indefinite amount of time before the login ID is deactivated.
  - **Within** - the number of invalid login attempts can occur within a set time period before the login ID is deactivated. To set this time period, enter the required number of minutes into the available text box or by using the provided up/down arrows.
- **Reactivate login after** - set the number of minutes the login is reactivated after by either entering the number of days into the available text box or by using the provided up/down arrows. If this is set to 0 the account will **NOT** be automatically reactivated. A NICE Inform Administrator will have to edit the details for the user (refer to Editing user details (see page 16)) and uncheck the **User automatically locked out** box in the **Inform User** page.

- **Display last login information** - when checked, the last login message is displayed to the user after a successful login (unchecked by default).
- **Require second password** - when checked, the user will have to enter a second password for authentication when logging into NICE Inform.

Auto Login

The following option is available:

- **All Active Directory users are logged in automatically** - check this box and all users that derive from an Active Directory domain, log in to NICE Inform automatically.

Auto Logout

Select one of the following:

- **User is never automatically logged out** - check this box to disable the **Auto Logout after** option.
- **Auto logout after** - set the number of minutes by either entering the number of minutes into the associated text box or by using the provided up/down arrows. When the period of inactivity has been exceeded, the user is logged out.

NOTE: Auto logout will stop anything you were doing prior to the period of inactivity. Activity in this case is manual movements of the mouse and key presses whilst using NICE Inform. If you are transferring a large amount of data and left the computer unattended, then this is deemed as inactivity and depending on the auto logout configuration, you may be logged out.

Login Message

The following option is available:

- **Show message** - check this box to enable the **Login Message** feature. Once enabled, enter a message title and text in the text boxes provided. The login message is displayed to all users with the configured message heading and text prior to logging in to NICE Inform.

General

The following options are available:

- **Audit failed login attempts** - check this box to enable this feature. Once checked, a 'failed login attempt' audit event is generated within the NICE Audit application when any user fails to log into NICE Inform.

NOTE: This feature can be disabled to prevent a Denial of Service attack from filling the Audit log.

- **Send SNMP trap on failed login attempts** - check this box to enable this feature. Once checked, a SNMP trap is sent when any user fails to log into NICE Inform.

Once you have configured the security settings, click the **Save** button.

4.3 Setting workstation permissions

NOTE: Specific terminology is used when navigating the tree pane to set workstation permissions. For help with this terminology, refer to Tree structure terminology (see page 4).

A security feature, workstation permissions is used to assign users to a particular workstation so that when they try to access NICE Inform, they can **ONLY** connect using that workstation. Users can also be unassigned and removed from a workstation.

NOTE: There is no limit to how many workstations can be assigned to one user or how many users that can be assigned to one workstation.

To set workstation permissions:

1. In the tree pane, select the **Organization** node.
2. Click the **Workstations** tab. The **Workstations** page is presented.

From here you can:

- **Assign a user to a workstation** (refer to Assigning a user to a workstation (see page 11)).
- **Remove a user from a workstation** (refer to Removing a user from a workstation (see page 12)).

4.3.1 Assigning a user to a workstation

NOTE: Specific terminology is used when navigating the tree pane to assign a user to a workstation. For help with this terminology, refer to Tree structure terminology (see page 4).

Any user that has the **Full access** workstations setting enabled within the Inform User page (refer to Editing user details (see page 16)), will not be affected when being assigned to a workstation.

- To assign a user to a workstation:

1. In the tree pane, select the **Organization** node and click the **Workstations** tab. The **Workstations** page is presented.
2. All the known workstation hostnames are available for selection within the **Workstations** table.
3. Select the required workstation and click the **Assign users button**. The **Assign Users to Workstation Wizard** opens at the **Welcome** screen.
4. Click the **Next** button to continue and the **Select Users** screen is presented.
5. Select the required **User Group** node in the tree. The users associated with that node are displayed alongside, including any sub-groups.
6. Select the user to be assigned to the workstation.

NOTE: Refer to Adding and removing items (see page 4) on how to add or remove selected users from the list:

7. Click the **Next** button to continue and the **Summary** screen is presented displaying all the users that have been assigned to the workstation.
8. Click the **Finish** button to exit the wizard. The user is now added to the **Allowed Users** table associated with the workstation hostname.
9. Click the **Save** button.

Once the user has been assigned to the workstation, you have to ensure that the user no longer has full access rights to all workstations connecting to NICE Inform. To perform this function of restricting the user, you need to edit the user details using the **Allowed Workstations** section within the **Inform User** page. Also within the **Allowed Workstations** section, you can assign a workstation to a user (refer to Assigning a workstation to a user (see page 23)).

NOTE: Double-clicking a user in the **Allowed Users** list takes you to the **Inform Users** page where you can edit the user's details (refer to Editing user details (see page 16)).

4.3.2 Removing a user from a workstation

NOTE: Specific terminology is used when navigating the tree pane to remove a user from a workstation. For help with this terminology, refer to Tree structure terminology (see page 4).

- To remove a user (or users) from a workstation:

1. In the tree pane, select the **Organization** node and click the **Workstations** tab. The **Workstations** page is presented.
2. All the known workstation hostnames are available for selection within the **Workstations** table.

3. Select the required workstation. All the users that have been assigned to this workstation are listed below in the **Allowed Users** table.
4. Select the user to be removed from the workstation.
5. Click the **Remove** button. A message is presented confirming the removal.
6. Click the **Yes** button.
7. Click the **Save** button. The user is now removed from the **Allowed Users** table.

5 Users

This section details the configuration of the users that access NICE Inform.

It covers the following areas:

5.1 Adding a new user to the system

NOTE: Specific terminology is used when navigating the tree pane to add a new user to the system. For help with this terminology, refer to Tree structure terminology (see page 4).

It is recommended to create a NICE Inform user account with administration privileges first prior to adding or importing any user from a Microsoft Active Directory domain.

You **MUST** be logged into the same domain as the NICE Inform server when adding users from a Microsoft Active Directory domain.

There are two different methods of adding a new user to the system:

- Adding a NICE Inform user by entering the users' details.
- From a Microsoft Active Directory domain.

▸ To add a new user to the system:

1. Do one of the following:

   – In the tree pane, select the **All Users** node. Click the **New** button and select **New User** from the drop down menu. The **New User Wizard** opens at the **Welcome** screen.

NOTE: If a user group is selected prior to adding a new user, the user will be added to that group.

Once added, the user can see all users within the groups they are a member of and any sub groups.

- In the tree pane, select the **All Users** node. Click the **General** tab and the **General** page is presented.

2. At the **Welcome** screen, click the **Next** button to continue and the **General Information** screen is presented.

3. Select one or more of the following:

   - **User is an Operator** - check this box if this user is required to be evaluated using NICE Inform Evaluator. Once this box is checked, the following feature is enabled:

     - **Shift** - click the drop down arrow and select the shift that applies to this operator (NICE Inform user). This shift is linked to the operator's evaluations within NICE Inform Evaluator.

NOTE: Shifts in this list are added on the *General page* and are enabled on the *Metadata page* in the *Evaluator* Applications section within *NICE Inform System Administration*.

   - **Authenticate using Active Directory** - check the box if you are adding a user from a Microsoft Active Directory domain.

NOTE: The check box is disabled if the NICE Inform server has not got access to Microsoft Active Directory.

The **First name** and **Last name** text boxes are disabled once you check the box.

   - **User is Temporary** - check this box if you require this user to have temporary access to NICE Inform. Once enabled, set the date and time that this user account is deleted. Enter the expiration date by using the text box provided. Date entry is assisted by clicking the **Calendar** button. A calendar control is provided to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*). Enter the expiration time (if required) using the text box provided. Time entry is assisted by either selecting the hours, minutes or seconds and then using the up/down arrows.

NOTE: You **MUST** at least set the expiration date/time one hour from the current date/time. By default the date/time is set to one day from the current date/time.

Once the expiration date/time has been reached, the user account is deleted from the system and will appear in the Non Active Users list (refer to Non active users (see page 22)). If the user is currently logged into NICE Inform, they will automatically be logged out.

4. Enter the User's **First** and **Last** names in the associated text boxes if you are adding a NICE Inform user.

NOTE: Both the **First name** and **Last name** fields are mandatory.

5. Click the **Next** button to continue and the **NICE Inform User Identification** screen is presented. The options vary depending on whether you have chosen to add a NICE Inform user or a Microsoft Active Directory domain user from within the **General Information** screen.

   – When adding a NICE Inform User:

   a. Enter the username for this user in the text box provided.
   b. Click the **Set** button. The **Set Password** dialog is presented.
   c. Type and retype the password for this user in the text boxes provided, noting the rules for passwords (refer to *Password Rules* in *Getting Started*). Click the **OK** button on completion.

NOTE: The screen closes if the details have been entered correctly. Otherwise an error message is displayed. In this case, you will be required to re-type both entries. If the second password feature has been enabled, then this will need to be set too. For help regarding activating the second password, refer to Setting security (see page 9) section.

   – When adding a NICE Inform user from a Microsoft Active Directory domain:

   a. Click the down arrow and select the Microsoft Active Directory domain that the user is located.
   b. Enter the domain in the **Domain** text box.

NOTE: The Domain option is **ONLY** displayed when the **Authenticate the domain user account using Active Directory** box has been checked within the **General Information** screen.

   c. Click the **Check** button to verify that the user exists on the domain. A message is presented informing you whether the user has been found on the domain or not. If not, you must enter a valid username before you can continue.
   d. Once you have either entered the details for the NICE Inform user or the Microsoft Active Directory domain user, click the **Next** button.

6. At the **Attach Profile (optional)** screen:

   a. Select the required profile. The details for that profile are listed as read-only in the **Profile Details** section.
   b. On completion, click the **Next** button.

7. At the **Summary** screen, check that the details for the user are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

5.2 Editing user details

NOTE: Specific terminology is used when navigating the tree pane to edit user details. For help with this terminology, refer to Tree structure terminology (see page 4).

- To edit the details of an existing user:

1. In the tree pane, select one of the following:
   - The **All Users** node.
   - The **User group** node to which the user belongs.
   - Use the **Search** facility to find the required user (refer to Searching for users, user groups and profiles (see page 54)).
2. Double-click the required user from the list in the right hand pane.
3. The **User Details** tabbed pages are displayed. Some tabs are 'grayed out' as the pages are not viewable. Other pages can be viewed, but are not editable, as described in the following sections.

The following pages are available:

NOTE: If you wish to make further changes, click the **Save** button to save the current changes, then click the tab for the next page you wish to view. Otherwise, click the **Close** button to finish.

- General page (see page 17)
- Inform User page (see page 17)
- Profile page (see page 20)
- Resources page (see page 21)
- Operator page (see page 20)

5.2.1 General page

At the General page, change the **First name** and/or **Last name**, as required using the text boxes provided.

5.2.2 Inform User page

NOTE:	If you have selected a NICE Inform user that is from a Microsoft Active Directory domain, all of the options within the Inform User page are read-only except for the **User permanently locked out**, **Auto logout after** and **Require second password** options in the Account Options and Allowed workstations sections.

The following sections are available:

User type

- **User is a NICE Inform user** - read-only user type. This box is always checked as the user is always a NICE Inform user.
- **User is an Operator** - check this box if this user is required to be evaluated using NICE Inform Evaluator. Once this box is checked, the following feature is enabled:
  - **Shift** - click the drop down arrow and select the shift that applies to this operator (NICE Inform user). This shift is linked to the operator's evaluations within NICE Inform Evaluator.

NOTE:	Shifts in this list are added on the *General page* and are enabled on the *Metadata page* in the *Evaluator* Applications section within *NICE Inform System Administration*.

- **User is an Active Directory user** - read-only user type. This box is checked if the user has derived from a Microsoft Windows Active Directory domain.

Login Details

- **Username** - edit the username in the text box provided.
- **Domain** - provided for your information is the name of the domain this user is on. This can either be:
  - **NICE Inform Login** - this user has been added using NICE Inform
  - **Microsoft Active Directory domain** - this user has derived from a Microsoft Active Directory domain. The name for this domain is displayed here.
- **Password** - click the **Set** button to display the **Set Password** dialog.
  Type and retype the password for this user in the text boxes provided and click the **OK** button. An error message will be displayed if you have not entered the password correctly.
- **Second password** - click the Set button to display the **Set Second Password** dialog.
  Type and retype the new second password in the text-boxes provided and click the **OK** button. An error message will be displayed if you have not entered the password correctly. This feature is only available when the **Require second password** box is checked within the **Account Options** section below. If not, the **Set** button is grayed out.

Password Options

- Select either the **Use System password settings** option or select the **User specific** option and edit the settings as required. When **User specific** is selected the following options are configurable for the individual user:
  - **Password never expires** - the password the user uses to login to NICE Inform will never expire.
  - **Expires in** - enter the number of days that the password is due to expire.
  - **User cannot change password** - check this box and the individual user will not be able to change their password.
  - **User must change password at next login** - check this box and the next time this user logs in they must change their password.

Account Options

- Select either the **Use System account settings** option or select the **User specific** option and edit the settings as required. When **User specific** is selected the following options are configurable for the individual user:
  - **User is never automatically logged out** - The user will never be automatically logged out of NICE Inform.
  - **Auto logout after** - enter the number of minutes before the user will be automatically logged out when idle.
  - **Require second password** - check this box and the **Set Second password** option (above) will need to be configured by clicking on the **Set** button.
- Further account options include:
  - **User is logged in automatically** - this option is only available if the user has derived from a Microsoft Windows Active Directory domain. Check the box and this user logs in to NICE Inform automatically.
  - **User permanently locked out** - check the box and the associated user's account is permanently locked. When the user tries to log in to NICE Inform they will be presented with an account locked message.
  - **User automatically locked out** - if this feature is enabled it is because either the user has entered their username and/or password incorrectly too many times or their account has been inactive for too long. Uncheck this box to re-enable their account so they can login again. The location to configure all user account settings is within the **Security** page at the **Organization** level. For help changing these account settings, refer to Setting security (see page 9).
  - **User is Temporary** - check this box if you require this user to have temporary access to NICE Inform. Once enabled, set the date and time that this user account is deleted. Enter the expiration date by using the text box provided. Date entry is assisted by clicking the **Calendar** button. A calendar control is provided to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*). Enter the expiration time (if required) using the text box provided. Time entry is assisted by either selecting the hours, minutes or seconds and then using the up/down arrows.

NOTE: If this user has an expiration date/time set when their account was created, the expiration date/time is automatically populated.

You **MUST** at least set the expiration date/time one hour from the current date/time. By default the date/time is set to one day from the current date/time.

Once the expiration date/time has been reached, the user account is deleted from the system and will appear in the Non Active Users list (refer to Non active users (see page 22)). If the user is currently logged into NICE Inform, they will automatically be logged out.

Allowed Workstations

- **Full access** - uncheck the box (default checked) and this user can no longer connect to NICE Inform using all available workstations. The user can now **ONLY** connect from allowed workstations. Assigning a workstation to a user can be performed here using the Assign Workstations to User Wizard.

  When unchecking the **Full access** box, the **Workstations** section becomes active.

  Options configurable for the individual user are:

  - **Assign** - assigns workstations to a user (refer to Assigning a workstation to a user (see page 23)).
  - **Remove** - removes workstations from a user (refer to Removing a workstation from a user (see page 23)).

You are required to save any changes before you exit the page either by clicking another tab or by clicking the **Save** button.

5.2.3 Profile page

The Profile page is predominantly read-only apart from the options to attach a new profile to a user (refer to Attaching a profile to a user (see page 52)) and remove a profile from a user (refer to Removing a profile from a user (see page 53)). It displays the profile attached to the selected user. To exit, click another tab or click the **Close** button.

5.2.4 Operator page

The Operators page displays the resources that are associated with the Operator (user) for evaluations.

NOTE: This page is **ONLY** available to Operator users. To set a user as an Operator, refer to Adding a new user to the system (see page 14) or Editing user details (see page 16).

This page provides the ability to associate resources (refer to Associating resources with an Operator (see page 24)) and remove associated resources from an Operator (refer to Removing associated resources from an Operator (see page 26)).

Once resources have been associated with the user they can be used when scheduling an evaluation for the Operator (refer to *Creating an evaluation schedule* in *NICE Inform Evaluator*).

5.2.5 Resources page

The Resources page provides a read-only view of all the resources attached to the selected user. To exit, click another tab or click the **Close** button.

NOTE: The **Save** and **Cancel** buttons are inactive on the Resources page.

5.2.6 Notifications page

The Notification page provides the ability to configure the selected user's email settings in order so the user can receive NICE Inform Evaluator notifications. To configure Notification settings, refer to *Notifications page* within *NICE Inform System Administration*.

- To configure user email settings:

1. Do one of the following:

   – Check the **Auto Discover** box. Notifications will be delivered to the email address associated with the users Active Directory entry. The email address is displayed as read-only in the **Address** text box below.

NOTE: For users that have been added as NICE inform users and not associated with an Active Directory entry, the Auto Discovery box is disabled and therefore you **MUST** enter the address manually using the Address text box.

Recovering the user's email address from Active Directory can take some time. During this period, the text *Discovering...* is displayed.

   – Uncheck the **Auto Discovery** box and enter the email address in the **Address** text box.

2. Click the **Save** button.

5.3 Deleting a user

NOTE: Specific terminology is used when navigating the tree pane to delete a user. For help with this terminology, refer to Tree structure terminology (see page 4).

- To delete a user from the system:

1. In the tree pane, select the **All Users**  node and click the **General** tab. The **General** page is presented.
2. Select the required user or users (using Microsoft Windows standard Shift and Ctrl methods) for deletion within the **Group Members** table.
3. Click the **Delete** button. A message is presented confirming the deletion.
4. Click the **Yes** button followed by the **Save** button.
5. A progress dialog is presented providing a summary you that the changes to the user (or users) have been saved.

6. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the deletion process completes, unless an error has occurred.
   - Once the deletion process is complete, click the **Close** button to close the dialog.

The user (or users) is now deleted from the system and will appear in the Non active users (see page 22) list.

5.4 Non active users

NOTE: Specific terminology is used when navigating the tree pane to view all non active users. For help with this terminology, refer to Tree structure terminology (see page 4).

Users that have been deleted from the system (refer to Deleting a user (see page 21)) are displayed within the **Non Active Users** group.

- To view all non active users:

1. In the tree pane, expand the **All Users**  node and select the **Non Active Users**  node.
2. All the non active users are displayed in the **Group Members** list within the **General** page.

NOTE: You **CANNOT** edit the **Group name** and **Description** text boxes.

Reactivating non active users

- To change a user (or users) back from an inactive to active state:

1. Select the required or user or users (using Microsoft Windows standard Shift and Ctrl methods) from the **Group members** list.
2. Click the **Activate** button. A message is presented confirming the activation.
3. Click the **Yes** button followed by the **Save** button.
4. A progress dialog is presented providing a summary you that the changes to the non active user (or users) have been saved.
5. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the activation process completes, unless an error has occurred.
   - Once the activation process is complete, click the **Close** button to close the dialog.

5.5 Assigning a workstation to a user

NOTE: Specific terminology is used when navigating the tree pane to assign a workstation to a user. For help with this terminology, refer to Tree structure terminology (see page 4).

- To assign a workstation to a user:

1. In the tree pane, select one of the following:
   - The **All Users** node.
   - The **User group** node to which the user belongs.
   - Use the **Search** facility to find the required user (refer to Searching for users, user groups and profiles (see page 54)).
2. Double-click the required user from the list in the right hand pane.
3. Click the **Inform User** tab and the **Inform User** page is presented.
4. In the **Allowed Workstations** section, uncheck the **Full access** box.

NOTE: Leaving the **Full access** checked means this user can access NICE Inform using any client workstation.

5. In the **Workstations** section, click the **Assign** button. The **Assign Workstations to User Wizard** opens at the **Welcome** screen.
6. Click the **Next** button to continue and the **Select Workstations** screen is presented.
7. Select the required workstation from the **Available workstations** list and add them to the **Selected Workstations** list.

NOTE: Refer to Adding and removing items (see page 4) on how to add or remove selected workstations from the list:

8. Click the **Next** button to continue and the **Summary** screen is presented displaying the workstation assigned to the user.
9. Click the **Finish** button to exit the wizard followed by the **Save** button. The workstation is now assigned to the user.

NOTE: You can also assign a user to a workstation within the **Workstations** page at the Organization level (refer to Assigning a user to a workstation (see page 11)).

5.6 Removing a workstation from a user

NOTE: Specific terminology is used when navigating the tree pane to remove a workstation from a user. For help with this terminology, refer to Tree structure terminology (see page 4).

- To remove a workstation from a user:

1. In the tree pane, select one of the following:
   - The **All Users** node.
   - The **User group** node to which the user belongs.
   - Use the **Search** facility to find the required user (refer to Searching for users, user groups and profiles (see page 54)).
2. Double-click the required user from the list in the right hand pane.
3. Click the **Inform User** tab and the **Inform User** page is presented.
4. In the **Allowed Workstations** section, uncheck the **Full access** box.
5. Select the workstation that is to be removed from the user from the **Workstations** list.
6. Click the **Remove** button followed by the **Save** button.
7. The workstation is now removed from the user. If this is the last workstation (or only workstation) removed for this user a confirmation message is presented informing you that this user will no longer be able to access NICE Inform from a known workstation:
8. Do one of the following:
   - Click the **No** button to keep the remaining workstation.
   - Click the **Yes** button and the remaining workstation will be removed from the user.

NOTE: The Workstation that is currently being used **CANNOT** be removed from an administrator account.

5.7 Associating resources with an Operator

NOTE: Specific terminology is used when navigating the tree pane to associate resources with an Operator. For help with this terminology, refer to Tree structure terminology (see page 4).

- To associate resources with an Operator for automatic evaluations that are created by evaluation schedules:

1. In the tree pane, select one of the following:
   - The **All Users** node.
   - The **User group** node to which the user belongs.
   - Use the **Search** facility to find the required user (refer to Searching for users, user groups and profiles (see page 54)).
2. Double-click the required Operator (user) from the list in the right hand pane.
3. Click the **Operator** tab and the **Operator** page is presented.
4. Click the **Associate** button. The **Associate Evaluation Resources Wizard** opens at the **Welcome** screen.
5. Click the **Next** button to continue.
6. At the **Associate Resources** screen, select the resources to be associated with the Operator:
   a. Select either **Recording systems** or **Resource groups** from within the **Groups** tree.
   b. Select the resources to be added.

NOTE: Refer to Adding and removing items (see page 4) on how to add or remove selected resources from the list.

Removing resources from the list, removes their association from the Operator.

If your system is configured with a Vesta integration, when associating resources with an Operator, you must associate multiple resources and not just one.

   c. On completion, click the **Next** button.
7. At the **Summary** screen, check that the details for the Operator associated resources are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.
8. Click the **Save** button. The resources are now attached to the user group.

5.8 Removing associated resources from an Operator

NOTE: Specific terminology is used when navigating the tree pane to remove associated resources from an Operator. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To remove associated resources from an Operator:

1. In the tree pane, select one of the following:
   - The **All Users** node.
   - The **User group** node to which the user belongs.
   - Use the **Search** facility to find the required user (refer to Searching for users, user groups and profiles (see page 54)).
2. Double-click the required Operator (user) from the list in the right hand pane.
3. Click the **Operator** tab and the **Operator** page is presented.
4. Select the required resource or resources (using Microsoft Windows standard Shift and Ctrl methods) within the **Resources** table.
5. Click the **Remove** button. A message is presented confirming the removal.
6. Click the **Yes** button followed by the **Save** button.

The resources are now removed from the Operator.

5.9 Importing users from a CSV file

NOTE: Specific terminology is used when navigating the tree pane to import users from a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Users can be imported from a CSV file into NICE Inform using the **Import Users Wizard**.

This method is quicker if you require adding multiple users at one time compared to adding users individually via the New User Wizard (refer to Adding a new user to the system (see page 14)).

Import users template

Provided is an XLS template for you to enter the relevant details for all the users that you wish to import into NICE Inform.

The template includes an example user and notes to provide guidance when entering your users' details.

NOTE: Ensure that when entering the users' details such as the name of the profile and user group is in the same case e.g. when adding a user into the Organizer profile ensure that you enter an upper case 'O'.

Once you have entered all the users in to the template you **MUST** ensure that it is saved as a .CSV file before you can import it into the **Import Users Wizard**.

NOTE: If you are unable to open the XLS template, then a CSV template is provided.

The XLS and CSV templates can be found on the NICE Inform server in the following location: *D:\Program Files (x86)\NICE\NICE Inform\Templates*

(where D:\ is your drive NICE Inform is installed on).

Importing users

NOTE: Once you have just created a new user group and/or created a new profile you **MUST** log out of NICE Inform and back in before importing new users into the system.

- To import users from a CSV file into the system:

1. In the tree pane, select the **All Users** node.
2. Click the **General** tab and the **General** page is presented.
3. Click the **Import** button and the **Import Users Wizard** opens at the **Welcome** screen.
4. Select the **Read the user information from a file** radio button and click the **Next** button.
5. At the **Select Users File** screen either, do one of the following:
   - Click the **Browse** button and browse to the location of your created users' CSV file and click the **Open** button.
   - Type the path for the CSV file into the text box provided.
6. Check that the path displayed for the CSV users file is correct and click the **Next** button to continue. A Wizard Progress dialog is presented providing a summary of the users' validation process.
7. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the validation process completes, unless an error has occurred.
   - Once the validation process is complete, click the **Close** button to close the dialog.
8. At the **Summary** screen, the following information is displayed:
   - The number of users that will be imported out of the total number requested.
   - Any users that failed the validation process and that cannot be imported are displayed in the accompanying table. The Validation failure column provides a basic description as to the failure and the Field value column displays the text in the field that failed the validation.

   Examples why importing a user may fail the validation process:

     - The user is being added to a user group that does not exist.

NOTE: If the same user group name exists in more than one location, the user group name needs to reflect the path of the user group using the provided template. For example, if a user group called *Dispatchers* is a sub user group under a parent group of *Fire* and *Police*, for the group name you must either enter File\Dispatchers or Police\Dispatchers. The user will get imported to the location that you specify.

- The user is being added to a group that has a backslash (\) in its name.
- The user is being attached to a profile that does not exist.
- The user is being attached to a profile that contains NICE Inform User Administration and/or NICE Inform System Administration and the password does not include the required number of characters as set by the **Administrator Password Checking** feature in the **Passwords** page (refer to Setting password details (see page 7)).
- The user being imported has the same name as a current user.

NOTE: If all users will be imported without any validation failures the **Summary** page changes to inform you that the users are ready to be imported.

9. Click the **Finish** button to import the users and a Wizard Progress dialog is presented providing a summary of the imported users.
10. Do one of the following:
    - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
    - Once the import process is complete, click the **Close** button to close the dialog.

The users are now shown in the table in the **General** page and associated with the user groups and profiles that you have defined.

NOTE: If you import a user (or users) with a second password set but the **Require second password** option is not enabled in the **Security** page within NICE Inform User Administration, the second password is **NOT** imported with the users' details.

5.10 Importing users from an Active Directory domain

NOTE: Specific terminology is used when navigating the tree pane to import users from a Microsoft Active Directory domain. For help with this terminology, refer to Tree structure terminology (see page 4).

You **MUST** be logged into the same domain as the NICE Inform server when importing users from a Microsoft Active Directory domain.

NICE Inform users can be imported from a Microsoft Active Directory domain using the **Import Users Wizard**.

This method is quicker if you require adding multiple Active Directory domain users at one time compared to adding users individually via the New User Wizard (refer to Adding a new user to the system (see page 14)).

To import users from an Active Directory domain into the system:

1. In the tree pane, select the **All Users** node.
2. Click the **General** tab and the **General** page is presented.
3. Click the **Import** button and the **Import Users Wizard** opens at the **Welcome** screen.
4. Select the **Read the user information from Active directory** radio button and click the **Next** button.
5. At the **Select Users screen**, select the required domain node in the tree. All the users associated with that node are displayed in the **Available users** list.

NOTE: When browsing Active Directory from your workstation, you will **ONLY** see users on the domain that the workstation is connected to and **NOT** the domain that the NICE Inform server is connected to. This means the workstation should be on the same domain as the NICE Inform server when importing users otherwise the import might product unpredictable results.

Refer to Adding and removing items (see page 4) on how to add or remove selected users from the list:

6. Click the **Next** button to continue.
7. At the **Select User Group** screen, select the user group to add the imported users to.

NOTE: The user group list is dependent on user groups being created (refer to Creating a new user group (see page 30)).

8. At the **Select Profile (Optional) screen**, select the required profile to attach the users to. The details for that profile are listed as read-only in the **Profile Details** section.

NOTE: The user group list is dependent on user groups being created (refer to Creating a new user group (see page 30)).

9. Click the **Next** button to continue.
10. At the **Summary** screen, click the **Finish** button to import the users and a Wizard Progress dialog is presented providing a summary of the imported users.

    If there are one or more users that cannot get imported, the **Summary** screen will change to display a table including the following information:

    – The number of users that will be imported out of the total number requested.
    – Any users that failed the validation process and that cannot be imported are displayed in the accompanying table. For example, Active Directory users that have already been imported into Inform would appear in this list. The **Validation failure** column provides a basic description as to the failure and the **Field value** column displays the text in the field that failed the validation.
11. Do one of the following:

- Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
- Once the import process is complete, click the **Close** button to close the dialog.

The users are now shown in the table in the **General** page and associated with the user groups and profiles that you have defined.

5.11 Creating a new user group

NOTE: Specific terminology is used when navigating the tree pane to create a new user group. For help with this terminology, refer to Tree structure terminology (see page 4).

To create a new user group:

1. In the tree pane, select **All Users** node or a user group (not including the **Non Active Users** or **Administrators** group).

NOTE: The new group will be created as a sub-group of the one selected.

2. Click the **New** button and select **New User Group** from the drop down menu. The **New User Group Wizard** opens at the **Welcome** screen. Click the **Next** button to continue.
3. At the **Group Name** and **Description** screen, enter the **Name** of the new group (mandatory) and **Description** (if required) in the text boxes provided.
4. Click the **Next** button to continue.
5. At the **Add Users (Optional)** screen, select the required user group node in the tree. The users associated with that node are displayed alongside, including any sub-groups.
6. Select the required users to add to the user group.

NOTE: Refer to Adding and removing items (see page 4) on how to add or remove selected users from the list.

7. Click the **Next** button to continue.
8. At the **Attach Resources (Optional)** screen, select the resources to be added to the user group:

   a. Select either **Recording systems** or **Resource groups** from within the **Groups** tree.
   b. Select the resources to be added.

NOTE: Refer to Adding and removing items (see page 4) on how to add or remove selected resources from the list:

   c. On completion, click the **Next** button.

9. At the **Summary** screen, check that the details for the user group are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

5.12 Editing a user group

NOTE: Specific terminology is used when navigating the tree pane to edit a user group. For help with this terminology, refer to Tree structure terminology (see page 4).

- To edit an existing user group:

1. In the tree pane, do one of the following:
   - Expand the **All users** node and select either the **Administrators** or a custom user group node.
   - Use the **Search** facility to find the required user group (refer to Searching for users, user groups and profiles (see page 54)).
2. In the right hand pane, two tabbed pages (**General** and **Resources**) are available for editing. Click the tab of the page you wish to view. The pages are summarized in the following sections:
   - General page (see page 31)
   - Resources page (see page 33)

5.12.1 General page

- At the General page:

1. Edit the existing **Group name** and/or **Description** as required using the text boxes provided.

NOTE: You **CANNOT** edit the **Group name** and **Description** text boxes for the **Administrators** and **Non Active Users** groups.

2. Configure the users within the user group as required using the following options:
   - **Show non active/Hide non active** - click **the Show non active/Hide non active** button to display/hide all non active users within the Group Members table. In the table, active users are show with an icon and non active users are shown with an icon.

NOTE: The **Show non active/Hide non active** button is **ONLY** available when you have selected the **All Users** node.

   - **Set as manager/Remove as manager** - to set/remove a user as a manager, select the user from within the **Group Members** table and click the **Set as manager/Remove as manager** button.

NOTE: The **Set as manager/Remove** as manager button is **ONLY** available when you have selected a 'custom' user group node.

You **CANNOT** remove manager status from yourself unless you are an Administrator.

This user will now have manager status within this group which allows the user to:

- View all users in this user group.
- Create a new user for this user group (refer to Adding a new user to the system (see page 14)).
- Create a new sub user group (refer to Creating a new user group (see page 30)).
- Move this user group (refer to Moving a user group (see page 37)).
- Set a user as a Manager.
- Add user group members to this user group (refer to Adding user group members (see page 36)).
- Remove user group members (see below).
- Edit this user group name.
- Attach resources to this user group (refer to Attaching resources to a user group (see page 35)).
- Remove resources from this user group (see below).
- Perform an evaluation for users in this group (refer to *Performing an evaluation* in *NICE Inform Evaluator)*.

Once set as a manager, the user is displayed in the **Group Members** table with a red star  next to his/her name.

– **Add** - click this button and the Add Group Members Wizard starts so you can add user group members to the selected group (refer to Adding user group members (see page 36)).

– **Remove** - to remove a user from the selected user group, select the required user for removal from the **Group Members** table and click the **Remove** button. Click the **Yes** button to the resulting confirmation message. The user is now removed from the user group.

NOTE: The **Add** and **Remove** buttons are **ONLY** displayed within the **General** page in the Administrators group and 'custom' user groups nodes.

You **CANNOT** remove the **Default Administrator** account from the **Administrators** group.

– **New** - starts the **New User Wizard** whereby you can add a new user to the system (refer to Adding a new user to the system (see page 14)).

– **Delete** - to delete a user from the system, select the required user for deletion from the **Group Members** table and click the **Delete** button. Click the **Yes** button to the resulting confirmation message. The user will now be removed from the system.

– **Import** - starts the **Import Users Wizard**, whereby you can import users from a CSV file in to the system (refer to Importing users from a CSV file (see page 26)).

NOTE: The **New**, **Delete** and **Import** buttons are **ONLY** displayed within the **General** page in the **All Users** node.

3. On completion, click the **Save** button.

5.12.2 Resources page

At the Resources page:

- Click the **Attach** button to attach additional resources to a user group. The **Attach Resources Wizard** starts (refer to Attaching resources to a user group (see page 35)). Once a user has been added to a user group, the resources are assigned to that user and its sub groups.
- Click the **Show resource pairs** button to display any paired resources in the resources table. Paired resources are used for parallel recording in resilient systems (refer to *Adding an NLS audio resource manually* or *Editing an NLS audio resource* within *NICE System Administration*).
- Available agencies for CAD resources that have been added for this data source (refer to *Adding an agency* within *NICE Inform System Administration*) are displayed within the **Agencies for IC partitioning** column. These CAD agencies can be assigned to (and unassigned from) the CAD resource that restricts the CAD incidents viewable by users in NICE Inform Intelligence Center to only those CAD incidents that belong to one of these assigned agencies. For help assigning resources, refer to Assigning agencies to a CAD resource (see page 36).

NOTE: When a CAD data source is deleted, the CAD resource is also deleted and therefore all assigned agencies are also deleted from all user groups.

When a CAD agency is deleted, that agency assignment is removed from the relevant CAD resource in all user groups.

- Click the **Remove** button to remove the required resources from the group.

▸ To remove resources from the user group:

1. Select the required resource or resources (using Microsoft Windows standard Shift and Ctrl methods). A message is presented confirming the removal.
2. Click the **Yes** button.
3. The resources are now removed from the user group.

NOTE: You can **ONLY** remove resources directly attached to the current group. In the instance that you are trying to remove resources assigned to sub groups then you will be presented with a message informing you that you cannot remove the resources. Click **OK** and the resources will **NOT** be removed.

5.12.3 Deleting users from search results

Any users that have been returned as part of a user search can be removed from the system.

- To delete users from search results:

1. Click the **Search** button above the tree pane and the **Search** dialog is presented.
2. Perform a user search.

NOTE: Refer to Searching for users, user groups and profiles (see page 54) for help performing a search.

3. Select the required users or a group of users (using Microsoft Windows standard Shift and Ctrl methods).
4. Click the **Delete Users** button and a confirmation message is presented listing the users that are going to be deleted.
5. Click the **Yes** button to continue.
6. A Wizard Progress dialog is presented providing a summary of the users that are being deleted.
7. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the deletion process completes, unless an error has occurred.
   - Once the deletion process is complete, click the **Close** button to close the dialog.

The user (or users) is now deleted from the system and will appear in the Non active users (see page 22) list.

6 Attaching resources to a user group

NOTE: Specific terminology is used when navigating the tree pane to attach resources to a user group. For help with this terminology, refer to Tree structure terminology (see page 4).

- To attach resources to a user group:

1. In the tree pane, expand the **All Users** node and select the required **User Group** node.
2. Click the **Resources** tab and click the **View all resources** link. After a period of time (depending on how many resources are associated with the selected group), the associated resources are listed in the **Resources** page.
3. Click the **Attach** button. The **Attach Resources Wizard** opens at the **Welcome** screen.
4. Click the **Next** button to continue.
5. At the **Attach Resources** screen, select the resources to be added to the user group:
   a. Select either **Recording systems** or **Resource groups** from within the **Groups** tree.
   b. Select the resources to be added.

NOTE: Refer to Adding and removing items (see page 4) on how to add or remove selected resources from the list.

When attaching CAD resources to a user group, only the primary CAD resource is available for selection.

   c. On completion click the **Next** button.

NOTE: You can attach a mixture of both types of resource by selecting those you require from one type and clicking **Add**, then selecting from the other type and clicking **Add** again.

6. At the **Summary** screen, check that the details for resources to be attached to the user group are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.
7. Click the **Save** button. The resources are now attached to the user group.

6.1.1 Assigning agencies to a CAD resource

NOTE: Specific terminology is used when navigating the tree pane to assign agencies to a CAD resource. For help with this terminology, refer to Tree structure terminology (see page 4).

The assigning agencies to a CAD resource feature is **ONLY** available if you are licensed for NICE Inform Intelligence Center.

CAD agencies can be assigned to (and unassigned from) the CAD resource that restricts the CAD incidents viewable by users in NICE Inform Intelligence Center to only those CAD incidents that belong to one of these assigned agencies.

To assign agencies to a CAD resource:

1. In the tree pane, expand the **All Users** node and select the **User Group** node.
2. Click the **Resources** tab and the **Resources** page is presented.
3. Within the **Resources** table, locate the required CAD resource ensuring it has the **Agencies for IC partitioning** column.
4. Select the CAD resource, right-click and select the **Assign agencies** option.
5. At the **Select Agencies** screen, select the agencies to be added for this CAD resource.

NOTE: Refer to Adding and removing items (see page 4) on how to add or remove selected agencies from the list.

Only the primary CAD resources are available for selection and not the resource pair. CAD users and CAD devices are also not displayed.

6. Click the **OK** button to continue.

The agencies are now assigned to the CAD resource and are listed in the **Agencies for IC partitioning** column within the **Resources** table.

6.2 Adding user group members

NOTE: Specific terminology is used when navigating the tree pane to add user group members. For help with this terminology, refer to Tree structure terminology (see page 4).

To add members to a user group:

1. In the tree pane, expand the **All Users** node and select the **User Group** node to which the members are to be added.
2. Click the **General** tab and the **General** page is presented.
3. In the **Group Members** table, click the **Add** button. The **Add User Group Members Wizard** opens at the Welcome screen. Click the **Next** button to continue.

4. At the **Select Users** screen, select the required user group where the users are to be added from.

NOTE: Refer to Adding and removing items (see page 4) on how to add or remove selected users from the list.

5. Click the **Next** button to continue.

6. You are then presented with a **Summary** screen showing you a list of users you have selected for this group.

7. Click the **Finish** button followed by the **Save** button to add the users to the group.

6.3 Moving a user group

NOTE: Specific terminology is used when navigating the tree pane to move a user group. For help with this terminology, refer to Tree structure terminology (see page 4).

The Move feature allows you to move a user group and its sub-groups (if any) from one node in the tree to another.

- To move a user group:

1. In the tree pane, expand the **All Users** node and select the **User Group** node to be moved.

2. In the button bar, click the **Move** button.

3. The **Move Group** dialog is presented showing the tree structure of the user groups that you have privilege to see.

4. Select the required group as the new parent group, and click the **OK** button.

The group is moved, together with all its sub groups, members and resources to the new location.

6.4 Deleting a user group

NOTE: Specific terminology is used when navigating the tree pane to delete a user group. For help with this terminology, refer to Tree structure terminology (see page 4).

- To delete a user group:

1. In the tree pane, expand the **All Users** node and select the **User Group** node to be deleted.

2. Click the **Delete** button. A message is presented confirming the deletion.

3. Click the **Yes** button.

The user group is now deleted.

6.5 Attaching a user to a profile

NOTE: Specific terminology is used when navigating the tree pane to attach a user to a profile. For help with this terminology, refer to Tree structure terminology (see page 4).

- To attach a user (or users) to a created profile:

In the tree pane, expand the **Profiles** node and select the required **Profile** node.

1. Click the **Users** tab and the **Users** page is presented.
2. Click the **Attach** button. The **Attach Users to Profile Wizard** opens at the **Welcome** screen. Click the **Next** button to continue.
3. At the **Select Users** screen, select the required **User Group** node in the tree. The users associated with that node are displayed in the **Available users** list.
4. Select the required users.

NOTE: Refer to Adding and Removing Items (see page 4) on how to add or remove selected users from the list:

5. Click the **Next** button to continue.
6. You are then presented with a **Summary** screen. Check that the correct users are to be added to the correct profile. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.
7. Click the **Save** button.

The users are now located in the **Users** list associated with the profile.

When attaching users to a profile with the NICE Inform Intelligence Center application, password implication may apply.

Interaction Center password implications

When editing or attaching users to a profile that has the NICE Inform Intelligence Center application added some, or, all users in that user profile may have to change their password before they can use NICE Inform Intelligence Center. NICE Inform will enforce a password change at the next NICE Inform log in attempt for affected users, unless an affected user is an administrator as all administrators have implicit access to NICE Inform Intelligence Center.

NICE Inform administrators may still need to change their password to use NICE Inform Intelligence Center, but the password change is not enforced by NICE Inform Intelligence Center and may be delayed until it is convenient, as some NICE Inform administrators may not need to access NICE Inform Intelligence Center.

However, affected NICE Inform administrators will still be unable to use the NICE Inform Intelligence Center system until their password has been changed. If you are a NICE Inform administrator and are unsure if you are affected and need to change your password, try to log in to NICE Inform Intelligence Center. If your attempt succeeds, you do not need to change your password but if it fails, you **MUST** change your password.

6.6 Removing a user from a profile

NOTE: Specific terminology is used when navigating the tree pane to remove a user from a profile. For help with this terminology, refer to Tree structure terminology (see page 4).

- To remove a user from a profile:

1. In the tree pane, expand the **Profiles** node and select the required **Profile** node.
2. Click the **Users** tab and the **Users** page is presented.
3. In the **Users** list, select the user to be removed from the profile.
4. Click the **Remove** button. A message is presented confirming the removal.
5. Click the **Yes** button followed by the **Save** button.

The user is now removed from the **Users** list associated with the profile.

NOTE: You **CANNOT** remove the default Administrator account from the Administrator profile.

7 Profiles

Users are given permission to use certain NICE Inform applications and application features by attaching a profile to them. A profile defines the module and features (application privileges) that are available for a user. Profiles define the roles the users perform within the module, such as a Supervisor or Investigator.

This section covers the following areas:

7.1 Application privileges

As a System Administrator, when creating a new profile (refer to Creating a new profile (see page 49)) or editing a profile (refer to Editing a profile (see page 50)), there are a number of application privileges that can be set.

NOTE: On some system configurations, not all features are installed. Therefore, some application privileges will not do anything.

The following NICE Inform applications and their application privileges are listed below:

7.1.1 NICE Inform Verify

Table 7-1: NICE Inform Verify application privileges

Application privilege	Description
Use Verify application	Enables access to the NICE Inform Verify application.
Change resource selection	Enables the logged in user to change what resources are selected in order to search against within the NICE Inform Verify application.
Time period to search	Enables you to configure (by clicking the **Edit** button) user shift restriction or the time period you can search back to replay calls. Select one of the following: ▪ **Since login** - when the login account changes on a particular workstation. This is counted as the start of the shift for the new user. If a user logs out of their account and back in, the start of the shift is still counted as the first time they logged in because the same user account is in use. ▪ **Since login change** - the last login time is counted as the start of the shift irrespective of whether the account changes or not. This is useful when the same account is used for all users on a workstation. ▪ **Time period** - select the required time period to search back to in minutes from the list available up to a maximum of 24 hours.
View annotations	Enables read-only access to view created annotations.
Add and view annotations	Enables access to add and view annotations.
Save calls	Enables access to save calls as either a wav or wma file.
Verify resources selection	Enables you to configure (by clicking the **Edit** button) the resource selection type of either resources assigned to a position or resources attached to a user group. Select one of the following: ▪ **Position** - NICE Inform Verify users resources assigned to a position. ▪ **User group** - NICE Inform Verify uses resource attached to a user group.
Restrict calls playback to a limited group of Inform users	Enables restriction when replaying audio recordings and read text conversations that have been marked as restricted.
Replay restricted calls and remove restrictions from calls	Enables access to replay audio recording and read text conversations that have been marked as restricted and enables the ability to remove restrictions on audio recording and text conversations.

7.1.2 NICE Inform Monitor

Table 7-2: NICE Inform Monitor application privileges

Application privilege	Description
Use Monitor Application	Enables access to the Monitor application.
Review recent calls	Enables access to review recent calls.
Time period to search	Enables you to configure (by clicking the **Edit** button) user shift restriction or the time period you can search back to replay recent calls. Select one of the following: ▪ **Since login** - when the login account changes on a particular workstation. This is counted as the start of the shift for the new user. If a user logs out of their account and back in, the

Application privilege	Description
	start of the shift is still counted as the first time they logged in because the same user account is in use. ▪ **Since login change** - the last login time is counted as the start of the shift irrespective of whether the account changes or not. This is useful when the same account is used for all users on a workstation. ▪ **Time period** - select the required time period to search back to in minutes from the list available to a maximum of 24 hours.
Restrict calls playback to a limited group of Inform users	Enables restriction when replaying audio recordings and read text conversations that have been marked as restricted.
Replay restricted calls and remove restrictions from calls	Enables access to replay audio recording and read text conversations that have been marked as restricted and enables the ability to remove restrictions on audio recording and text conversations.

7.1.3 NICE Inform Reconstruction

Table 7-3: NICE Inform Reconstruction application privileges

Application privilege	Description
Use Reconstruction application	Enables access to the Reconstruction application.
Search and playback audio recordings	NOTE: Enables the search and playback of audio recordings for NiceLog loggers only audio and Motorola MCC 7500 loggers only. Select one of the following: ▪ **All locations** - playback of audio recordings from all locations. ▪ **Storage Center only** - playback of audio recordings from NICE Storage Center. ▪ **Storage Center and retrieval loggers only** - playback of audio recordings from NICE Storage Center and retrieval loggers/playback units but **NOT** from recording loggers. ▪ **Retrieval loggers only** - playback of audio recordings from retrieval loggers/playback units but **NOT** from recording loggers or NICE Storage Center. ▪ **None - no replay permitted** - searching for audio recordings is permitted but replay of audio recordings is **NOT** permitted.
View annotations	Enables read-only access to view created annotations.
Add and view annotations	Enables access to add and view annotations.
Save and load scenarios	Enables access to save and load scenarios (selected recordings).
Print results	Enables access to the Printing Wizard.
Retrieve recordings from removable media	Enables access to playback recordings from an offline storage device.
Save and use public searches	Enables access to save public searches and for access to use public searches (including edit & delete).
Use public saved searches	Enables only the use of a saved public search and **NOT** access to edit or delete the saved search.
Save and use private searches	Enables access to save private searches and for access to use private searches (including edit & delete).

Application privilege	Description
Use private saved searches	Enables only the use of a saved private search and **NOT** access to edit or delete the saved search.
Perform Inserter table searches	Enables access to perform an Inserter search.
View paired secondary resources	Enables access to change the paired results view in Timeline display and Results Table. This also applies to NICE Inform Organizer and NICE Inform Evaluator.
Add to Organizer	Enables access to be able to add recordings to NICE Inform Organizer either via the Add to Organizer Wizard or Smart Transfer to Organizer Wizard. You can select the level of control (by clicking the **Edit** button) when using the Add to Organizer Wizard. Select one of the following: ▪ **Full control** - you can add **ALL** recordings to NICE Inform Organizer using the Add to Organizer Wizard. ▪ **Between markers only** - you can **ONLY** add recordings that are between playback markers to NICE Inform Organizer when using the Add to Organizer Wizard.
Time period to search	Enables user shift restriction (by clicking the **Edit** button). Select one of the following: ▪ **Unlimited** - there are no time/date restrictions when performing a search. ▪ **Last 30 days** - searching is limited to the last 30 days. ▪ **Since login** - when the login account changes on a particular workstation. This is counted as the start of the shift for the new user. If a user logs out of their account and back in, the start of the shift is still counted as the first time they logged in because the same user account is in use. ▪ **Since login change** - the last login time is counted as the start of the shift irrespective of whether the account changes or not. This is useful when the same account is used for all users on a workstation.
Use NICE Inform audio analytics	Enables access to search for and view audio analytics categories and detections.
Create and edit audio redactions	Enables access to the Redaction panel in order to create audio redactions.
Use CAD integration	Enables access to search for CAD incidents.
Audit accessed audio and create audio access reports	Enables access to create PDF reports for selected audio recordings via Timeline display and Results table context menus.
Restrict calls playback to a limited group of Inform users	Enables restriction when replaying audio recordings and read text conversations that have been marked as restricted.
Replay restricted calls and remove restrictions from calls	Enables access to replay audio recording and read text conversations that have been marked as restricted and enables the ability to remove restrictions on audio recording and text conversations.
View i3 LogEvent Reports	Enables access to view an i3 log event report for the selected SIP call within the Timeline display or Results table accessed via a **i3 LogEvents Reports** context menu option.. NOTE: This privilege is **ONLY** displayed if your system has been configured for i3 Log Event Reports.

7.1.4 NICE Inform Organizer

Table 7-4: NICE Inform Organizer application privileges

Application privilege	Description
Use Organizer application	Enables access to the Organizer application.
Playback Reconstruction Content	Enables the playback of Reconstruction Content (using the Playback control within the Reconstruction Content List page).
Add, edit and delete incident folders	Enables access to create, edit and delete created incident folders.
Edit existing folders	Enables access to edit incident folders but **NOT** delete. If the **Add, edit and delete incident folders** privilege is enabled, it overrides this privilege.
Add and remove Related Material	Enables access to add and remove Related Material for any incident.
Distribute and export incident folders	Enables access to export incident folders and distribute incident folders. You can select the level of control (by clicking the **Edit** button) when distributing incident folders. Select one of the following: ▪ **Full control** - you can distribute whole incidents, incident folders, or any entire selection within an incident (e.g. a recording or a file). ▪ **Whole incident folders only** - you can **ONLY** distribute whole incidents or incident folders.
Edit incident access privileges	Enables changing the access privileges for the selected incident.
Manage incident profiles	Enables access to create, edit and delete Distribution Profiles.
Create EMC Centera locked copies	Enables access to create an incident snapshot whereby incidents are copied and locked. This feature is ONLY available when NICE Inform Organizer is setup with an EMC Centera device for its incident storage.
Allow Media Player distribution without password	Enables access to create a distribution in NICE Inform Media Player format without a password.
Create Inform Media Player distributions	Enables access to create a distribution in NICE Inform Media Player format.
Copy data between incidents	Enables you to configure (by clicking the **Edit** button) the level of control when copying Reconstruction Content (recordings) between incidents. Select one of the following: ▪ **Full control** - you can copy all Reconstruction Content between incidents. ▪ **Between markers only** - you can **ONLY** copy Reconstruction Content that is between playback markers.
Delete Reconstruction Content	Enables access to delete Reconstruction Content from an incident.

Application privilege	Description
Import external media	Enables access to import external media into a Reconstruction Content incident folder.
Edit of imported external media properties	Enables access to edit the properties of external imported media.
Add partial items to Organizer	Enables access to add partial selections to Organizer.
Create and edit audio redactions	Enables access to the Redaction panel in order to create audio redactions.
Manage incident retention	Enables access to override the global incident retention setting when creating and editing an incident as set in the Incident Storage page in NICE Inform System Administration. Without this privilege, you can only set the retention date after the displayed date (global setting) and **NOT** before.
Restrict calls playback to a limited group of Inform users	Enables restriction when replaying audio recordings and read text conversations that have been marked as restricted.
Replay restricted calls and remove restrictions from calls	Enables access to replay audio recording and read text conversations that have been marked as restricted and enables the ability to remove restrictions on audio recording and text conversations.

7.1.5 NICE Inform Reporter

Table 7-5: NICE Inform Reporter application privileges

Application privilege	Description
Use Reporter Application	Enables access to the Reporter application.
Delete report definition	Enables access to delete user reports. Public reports cannot be deleted.
Create report form template	Enables access to create a new report from a supplied template.
Create report from existing copy	Enables access to create a copy of an existing report.

7.1.6 NICE Inform Evaluator

Table 7-6: NICE Inform Evaluator application privileges

Application privilege	Description
Use Evaluator application	Enables access to the Evaluator application.
Manage evaluations	Enables access to create, update and delete ad-hoc and user evaluations.
Complete any evaluation	Enables access to set evaluations to the **Complete** state that the user has evaluate rights for.
Manage evaluation creation schedules	Enables the creation and deletion of evaluation schedules.

Application privilege	Description
Schedule CAD incidents for evaluation	Enables access to schedule CAD incidents for evaluations.
Move 'In Progress evaluations back to 'Created'	Enables access to set evaluation to the **In progress** state to the **Created** state for evaluations that the user has evaluate rights for.
Restrict calls playback to a limited group in Inform users	Enables restriction when replaying audio recordings and read text conversations that have been marked as restricted.
Replay restricted calls and remove restrictions from calls	Enables access to replay audio recording and read text conversations that have been marked as restricted and enables the ability to remove restrictions on audio recording and text conversations.

7.1.7 NICE Inform Archive

Table 7-7: NICE Inform Archive application privileges

Application privilege	Description
Use Archive application	Enables access to the Audit application.
Configure archive storage	Enables access to configure archive storage.
Add, edit and delete archives	Enables access to create, edit and delete created archives.
Load and unload archives	Enables access to the load and unload created archives.

7.1.8 NICE Inform Audit

Table 7-8: NICE Inform Audit application privileges

Application privilege	Description
Use Audit application	Enables access to the Audit application.
Add and view annotations	Enables access to add annotations to existing audit events.
View annotations	Enables access to view annotations which have been added to existing audit events.
Add manual audit events	Enables access to add manual audit events.

7.1.9 NICE Inform User Administration

Table 7-9: NICE Inform User Administration application privileges

Application privilege	Description
Use User Administration application	Enables access to the User Administration application.
Add, edit and delete users	Enables access to add, edit and delete users. The user has to be a part of the Administrators group for this privilege to be enabled. NOTE: This privilege requires the user to be a member of the Administrators group or a group manager.
Edit users	Enables access to edit user details but **NOT** delete. If the **Add, edit, delete users privilege** is enabled, it over-rides this privilege.

Application privilege	Description
	NOTE: This privilege requires the user to be a member of the Administrators group or a group manager.
Add, edit and delete user groups	Enables access to add, edit and delete user groups.
Manage the contents of user groups	Enables access to add and remove users from within user groups.
Add, edit and delete application profiles	Enables access to create, edit and delete created application profiles. It is **NOT** possible to add, edit or delete system generated profiles.
Edit application profiles	Enables access to edit existing application profiles. If the **Add, edit, delete application profiles** privilege is enabled, it over-rides this privilege. It is **NOT** possible to add, edit system generated profiles.
Assign and remove resource permissions	Enables the attachment and removal of resources to user groups.
Configure password security parameters	Enables access to change the global password security parameters.
Configure account security parameters	Enables access to change the global account security parameters.

7.1.10 NICE Inform System Administration

Table 7-10: NICE Inform System Administration application privileges

Application privilege	Description
Use System Administration application	Enables access to the System Administration application.
Add, edit and delete sites	Enables access to edit NICE Inform sites. Adding and deleting a NICE Inform site is a future feature.
Add, edit and delete Inform servers	Enables access to add, edit and delete NICE Inform servers.
Add, edit and delete resource groups	Enables access to create, edit and delete resource groups.
Manage the contents of resource groups	Enables access to edit the contents of existing Resource Groups. If the **Add, edit, delete application resource groups** privilege is enabled, it over-rides this privilege.
Add, edit and delete recording systems	Enables access to add, edit and delete recording systems. The user has to be a part of the Administrators group for this privilege to be enabled.
Manage backups and schedules	Enables access to add, edit and delete backup schedules and perform one-time & recurring backups.
Import and export resources from/to file	Enables access to import and export resource definitions from a CSV file. The user has to be a part of the Administrators group for this privilege to be enabled.
Import resources from a system	Enables the ability to import resources from a connected recording system The user has to be a part of the Administrators group for this privilege to be enabled.
Import license file	Enables access to import a license file.

Application privilege	Description
Configure audit parameters	Enables access to edit the audit database management parameters.
Configure Inform server settings	Enables access to configure all general Inform server settings.
Configure resilient Inform servers	Enables access to configure a resilient Inform system.
Configure CLS replication	Enables access to configure CLS replication.
Use Maintenance Mode	Enables access to the Maintenance mode
Configure EMC Centera	Enables access to configure EMC Centera connections.
Add, edit and delete workstations	Enables access to add, edit and delete workstations.
Add, edit and delete Inform positions	Enables access to create, edit and delete Inform positions.
Configure logger settings	Enables access to configure the settings for the logger.
Manage logger backup	Enables access to manage logger backups.
Configure NICE Interaction Management Storage Centers	Enables access to configure NICE Interaction Management Storage Centers.
Configure security key servers	Enables access to configure security key servers.
Add, edit and delete hub accounts	Enables access to add, edit and delete hub accounts.
Add, edit and delete map views and layers	Enables access to add, edit and map views and layers.
Allow logger media eject	Enables access to eject media from loggers (by clicking the **Edit** button). Select one of the following: ▪ **All loggers** - you can eject media from all loggers. ▪ **Retrieval loggers only** - you can **ONLY** eject media from retrieval loggers. If the user has the **Manage logger backup privilege** enabled this privilege is ignored as the user will have full access to eject media from all loggers.
Configure NICE Inform audio analytics	Enables access to configure NICE Inform audio analytics.
Configure application settings	Enables access to edit settings for NICE Inform applications.
Configure recording systems	Enables access to configure the settings for NICE Recording data sources.

7.1.11 NICE Inform Template Designer

Table 7-11: NICE Inform Template Designer application privileges

Application privilege	Description
Use Template Designer application	Enables access to the Template Designer application.
Manage evaluation forms	Enables access to create, update and delete evaluation forms.

7.1.12 NICE Inform API

Table 7-12: NICE Inform API application privileges

Application privilege	Description
Use NICE Inform API	Enables access to the NICE Inform API application.
Use search and retrieval API	Enables an external application to NICE Inform to retrieve the list of audio resources available on an NICE Inform server and then make time frame searches based on them.
Use incident management API	Enables an external application to NICE Inform to manage NICE inform incidents. It provides the following functions: ▪ Create incidents with associated recordings and related material files etc. and upload them to the NICE Inform server. ▪ Search for incidents details that allows you (via the Inform API) to search for details of existing incidents and their associated recordings and related material files etc.

7.1.13 NICE Inform Intelligence Center

Table 7-13: NICE Inform Intelligence Center application privileges

Application privilege	Description
Use application	Enables access to the NICE Inform Intelligence Center application.
Manage Intelligence Center	Future feature.
Create, edit and delete dashboards	Enables the ability to create, edit and delete dashboards in NICE Inform Intelligence Center.
Include free audio with agency partitioning	Enables access to telephony which is not associated with a CAD incident. This privilege only comes into effect when the **Use agency partitioning** privilege is enabled.
Use agency partitioning	Enables access to apply agency partitioning to NICE Inform Intelligence Center incident data.

7.2 Creating a new profile

NOTE: Specific terminology is used when navigating the tree pane to create a profile. For help with this terminology, refer to Tree structure terminology (see page 4).

Use the New Profile Wizard to create a new custom profile with the applications and associated privileges that you require. Once created, you can attach a user to this profile (refer to Attaching a user to a profile (see page 38)).

▸ To create a new profile:

1. In the tree pane, select the **Profiles** node and click the **New** button. Select **New Profile** from the drop down menu.
2. The **New Profile Wizard** opens at the **Welcome** screen. Click the **Next** button to continue.
3. At the **Profile Name and Description** screen, enter the **Name** of the new profile (mandatory) and **Description** (if required) in the text box provided.

4. Click the **Next** button to continue and the **Application Privileges** screen is presented.

5. Set the required applications and associated privileges for the new profile.

6. Allocate the Application privileges that will apply to this profile doing one of the following:

   – Checking the associated check boxes. For help regarding what each application privilege means, refer to Application privileges (see page 40).

NOTE: To select all application privileges, click the **Select All** button and to deselect all privileges, click the **Clear All** button.

   – Select the required application privilege and:

   a. Click the **Edit** button. The **Edit Privilege Parameter** dialog is presented.
   b. Check the **Enable** privilege box.

NOTE: If there is a parameter set within the Privilege parameters column, then this can be edited. Select the application privilege and click the **Edit** button. The **Edit Privilege Parameter** dialog is presented with an extra drop down box to select the value for this parameter.

   c. Click the **OK** button to continue.

7. On completion, click the **Next** button.

8. At the **Summary** screen, check that the details for the profile are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

7.3 Editing a profile

NOTE: Specific terminology is used when navigating the tree pane to edit a profile. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To edit an existing profile:

1. In the tree pane, expand the **Profiles** node and select the required **Profile** node.

2. Click the **General** tab and the **General** page is presented.

3. Edit the **Profile** name and **Description** using the associated text boxes as required.

4. Update the applications that will apply to this profile by checking/unchecking the associated check boxes as required.

5. Update the **Application Privileges** that will apply to this by doing one of the following:

   – Checking/unchecking the associated check boxes. For help regarding what each application privilege means, refer to Application privileges (see page 40).

NOTE: To select all application privileges, click the **Select All** button and to deselect all privileges, click the **Clear All** button.

– Selecting the required application privilege and:

a. Click the **Edit** button. The **Edit Privilege Parameter** dialog is presented.
b. Check the **Enable privilege** check box.

NOTE: If there is a parameter set within the **Privilege parameters** column, then this can be edited. Select the application privilege and click the **Edit** button. The **Edit Privilege Parameter** dialog is presented with an extra drop down box to select the value for this parameter.

c. Click the **OK** button to continue.

6. On completion, click the **Save** button.

NOTE: You **CANNOT** edit the **Profile** and **Description** text boxes within the Administrators profile.

There is also a **Users** page available when editing a profile. Here you can attach a user to a profile (refer to Attaching a user to a profile (see page 38)) and remove a user from a profile (refer to Removing a user from a profile (see page 39)).

When editing a NICE Inform Interaction Center profile, password implications may apply.

Interaction Center password implications

When editing or attaching users to a profile that has the NICE Inform Intelligence Center application added some, or, all users in that user profile may have to change their password before they can use NICE Inform Intelligence Center. NICE Inform will enforce a password change at the next NICE Inform log in attempt for affected users, unless an affected user is an administrator as all administrators have implicit access to NICE Inform Intelligence Center.

NICE Inform administrators may still need to change their password to use NICE Inform Intelligence Center, but the password change is not enforced by NICE Inform Intelligence Center and may be delayed until it is convenient, as some NICE Inform administrators may not need to access NICE Inform Intelligence Center.

However, affected NICE Inform administrators will still be unable to use the NICE Inform Intelligence Center system until their password has been changed. If you are a NICE Inform administrator and are unsure if you are affected and need to change your password, try to log in to NICE Inform Intelligence Center. If your attempt succeeds, you do not need to change your password but if it fails, you **MUST** change your password.

7.4 Deleting a profile

NOTE: Specific terminology is used when navigating the tree pane to delete a profile. For help with this terminology, refer to Tree structure terminology (see page 4).

- To delete a profile:

1. In the tree pane, expand the **Profiles** node and select the required **Profile** node for deletion.
2. In the button bar, click the **Delete** button. A message is presented confirming the deletion.
3. Click the **Yes** button.

The profile is now deleted.

NOTE: You **CANNOT** delete the Administrators profile.

7.5 Attaching a profile to a user

NOTE: Specific terminology is used when navigating the tree pane to attach a profile to a user. For help with this terminology, refer to Tree structure terminology (see page 4).

- To attach a profile to a user:

1. In the tree pane, select the **All Users** node and click the **General** tab. The **General** page is presented.
2. Select the **User** from the **Group Members** table and double-click.
3. Click the **Profile** tab and the **Profile** page is presented.
4. Click the **Attach** button and the **Attach Profile Wizard** opens at the **Welcome** screen. Click the **Next** button to continue.
5. At the **Select Profile** screen, select the required profile. The details for that profile are listed as read-only in the **Profile Details** section.
6. On completion, click the **Next** button.
7. At the **Summary** screen check the details for this user are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.
8. Click the **Save** button.

The profile is now attached to the user.

NOTE: If a user is attached to a profile that has either (or both) System Administration or User Administration applications, then the password must pass the administrator password check if it is set within the **Passwords** page (refer to Setting password details (see page 7)). If the password does not pass the check, this user **MUST** change their password the next time they log into NICE Inform.

7.6 Removing a profile from a user

NOTE: Specific terminology is used when navigating the tree pane to remove a profile from a user. For help with this terminology, refer to Tree structure terminology (see page 4).

- To remove a profile from a user:

1. In the tree pane, select the **All Users** node and click the **General** tab. The **General page** is presented.
2. Select the user from the **Group Members** table and double-click.
3. Click the **Profile** tab and the **Profile** page is presented.
4. Within the **Attached Profile** table, select the required profile to be removed from the user.
5. Click the **Remove** button. A message is presented confirming the removal.
6. Click the **Yes** button followed by the **Save** button.

The profile is now removed from the **Attached Profiles** list associated with the user.

8 Searching for users, user groups and profiles

The User Administration search facility enables you to find Users, user groups, profiles and descriptions quickly and easily.

- To use the search facility:

1. Click the **Search** button above the tree pane and the **Search** dialog is presented.
2. In the **Search** text box, type the required text.
3. The following wildcard characters are supported:
   - **%** for anything, e.g. **WATER%** finds items that start with the characters '**WATER**', '**waterfall**', '**waterproof**', etc. **%WATER** will find items that end in '**WATER**', '**freshwater**, '**breakwater**', etc. '**%WATER%**' will return any item containing the term '**WATER**'. The '**%**' cannot be the only character in the term. If you want to search for a string containing the '**%**' symbol, use the special sequence '**%%**'.
   - **?** for a single character, e.g. '**90?10**' will find the terms '**90110**', '**90210**', '**90310**', '**90A10**', etc. The question mark cannot be the only character in the term. If you want to search for a string contains the '**?**' symbol, use the special sequence '**?**'.

NOTE: Searches are **NOT** case sensitive.

4. Check one or more of the following options: **Users**, **User Groups**, **Profiles**, and **Include descriptions in search**.

NOTE: By default, one option is selected whenever the dialog opens, depending on which entry in the tree you have selected. However, you can select more than one option.

5. On completion, click the **OK** button and the **Search Results** page is presented displaying all the results in the **Results** table. To view details, double-click anywhere in the associated column in the **Results** table.

NOTE: You can delete any users from the system that have been returned in the search (refer to Deleting users from search results (see page 34)).

ABOUT NICE

NICE (NASDAQ: NICE) is the worldwide leader of software solutions that deliver strategic insights by capturing and analyzing mass quantities of structured and unstructured data in real time from multiple sources, including phone calls, mobile apps, emails, chat, social media, and video. NICE solutions enable organizations to take the Next-Best-Action to improve customer experience and business results, ensure compliance, fight financial crime, and safeguard people and assets. NICE solutions are used by over 25,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies. www.nice.com

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