



**PureConnect®**

**2020 R1**

Generated:

18-February-2020

Content last updated:

13-November-2019

See **Change Log** for summary of changes.



# Interaction Web Portal

## Printed Help

### Abstract

This document contains the application help for Interaction Web Portal.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/cic>.

For copyright and trademark information, see  
[https://help.genesys.com/cic/desktop/copyright\\_and\\_trademark\\_information.htm](https://help.genesys.com/cic/desktop/copyright_and_trademark_information.htm).

# Table of Contents

Table of Contents	2
Introduction	5
Call Recordings	5
Interaction Statistics	5
Call Monitoring	5
Historical Reports	5
Portal Management	5
Requirements	5
Interaction Web Portal User Interface	6
Change Your Password	6
View Announcements	7
Access Control	7
Work with Call Recordings	8
Work with Call Recordings	9
Access to Call Recordings	10
Access to Queries	10
Access to Other Recording Features	10
Call Recording Terminology	11
Recordings	11
Recording Details	11
Queries	11
Scorecard	11
Search Recordings	11
Accessing Recording Searches	11
Types of Searches	11
Run a Pre-defined Search	11
Run a Custom Search	12
Maximum Number of Recordings	12
Refresh a Query	12
Stream a Call Recording	13
Download a Recording	13
View Scorecards	14
Set Recording Options for an Organization	14
Enabling or Disabling the Call Recordings Portlet	14
Welcome Page Settings	14
Live Smooth Streaming	14
Recording Query Settings	14
Recording Column Properties	15
Recording Detail Properties	15
Save Your Changes	15
Work with Statistics	16
Change the Service-Level Indicator Workgroup and Interval	16
Refresh the Statistics on the Home page	16
View the Statistics Carousel	17
Add New Statistics to the Carousel	17
Modify Chart Types	17
Modify Chart Parameters and Dates	17
Run a Report Related to a Statistic	17
Work with Statistics	18
Change the Service-Level Indicator Workgroup and Interval	18
Refresh the Statistics on the Home page	19
View the Statistics Carousel	19
Add New Statistics to the Carousel	19
Modify Chart Types	19
Modify Chart Parameters and Dates	19
Run a Report Related to a Statistic	19
Available Statistics	20
Access to Statistics	24
Set Statistics Options for an Organization	25

Enabling or Disabling the Statistics Portlet	25
Default Rotation Interval for the Statistics Carousel	25
Statistics Panels	25
Save Your Changes	25
Set Service Indicator Default Settings	26
Change the Statistics Update and Rotation Intervals	27
Setting the Default Rotation Interval (Administrators)	27
Setting Your Own Rotation and Update Intervals (Users)	27
Add a Chart Panel	28
Add a Chart Panel	29
Delete a Chart Panel	29
Edit a Chart Panel	30
Reorder Chart Panels	30
View Historical Reports	31
Download Recent Reports	31
Specify Information for Available Reports	31
View Historical Reports	32
Download Recent Reports	32
Specify Information for Available Reports	32
Access to Reports	33
Edit Settings for an Available Report	33
Set Reporting Options	34
Enabling or Disabling the Reporting Portlet	34
Report Selection	34
Save Your Changes	34
Monitor Agents on Live Calls	35
Monitor Agents on Live Calls	36
Access to Call Monitoring	36
Request a Recording in an Email	37
Save Call Details	37
Manage Organizations and Users	38
Manage Organizations and Users	38
Access to Organizations	38
Create, Delete, and Save Basic Organization Information	38
Organization Assignments	38
Reporting Tasks	39
User-Related Tasks	39
Other Configuration Tasks	39
Add an Organization	40
Accessing Organization Management	40
Add and Configure an Organization	40
Delete an Organization	41
Accessing Organization Management	41
Delete an Organization	41
Add a User to an Organization	41
Create a New Portal User	41
Create a Portal User from a CIC User Account	42
Provision Portal Users	42
Portal Features	43
User Roles	44
Set Recording Options for an Organization	45
Enabling or Disabling the Call Recordings Portlet	45
Welcome Page Settings	45
Live Smooth Streaming	45
Recording Query Settings	45
Recording Column Properties	45
Recording Detail Properties	46
Save Your Changes	46
Set Recording Options for an Organization	46
Enabling or Disabling the Call Recordings Portlet	46
Welcome Page Settings	46
Live Smooth Streaming	46

Recording Query Settings	47
Recording Column Properties	47
Recording Detail Properties	47
Save Your Changes	47
Set Statistics Options for an Organization	48
Enabling or Disabling the Statistics Portlet	48
Default Rotation Interval for the Statistics Carousel	48
Statistics Panels	48
Save Your Changes	48
Set Call Monitoring Options	49
Monitored Workgroups	49
Monitored Classifications	49
Monitor Settings	49
Save Your Changes	49
Set Reporting Options	50
Enabling or Disabling the Reporting Portlet	50
Report Selection	50
Save Your Changes	50
Set Service Indicator Default Settings	51
Set Security Options	51
Set Password Options and Enable or Disable Password Complexity	51
Password Options	51
Password Complexity	52
Save Your Changes	52
Post Announcements	53
Post an announcement for an organization	53
Post a System Announcement	53
Configure CIC Server Options	54
Accessing CIC Server Configuration	54
LDAP Credentials	54
CIC Servers	54
Live Smooth Streaming (IIS Media Services) Settings	54
Add a Logo to the Portal	55
To add a logo:	55
Delete a Logo	55
Agent Portal	56
Agent Portal	56
Access to Features in the Agent Portal	56
Agent Portal Home Page	58
Agent Portal – Statistics	58
Agent Portal – Quality and Satisfaction Trends	60
Agent Portal – Wrap-up Codes	60
Agent Portal Feedback Results	61
Agent Portal – Overview of Work Schedule	62
Agent Portal – Overview of Work Schedule	62
Agent Portal – Request Time Off	62
Agent Portal – Zoom to Schedule	63
Change log	64

# Introduction

Interaction Web Portal combines several key call center management features to track your call center activity through a simple web-based portal.

On the **Home** page of the portal, you can see up to five *portlets*. The number of portlets you see depends on your role within the organization and the portal features to which an administrator grants you access. Each portlet displays information about current activity and contains a link where you can view more details.

Each of the portlets is described below.

## Call Recordings

In the [Call Recordings](#) portlet, agents and supervisors can view statistics for a workgroup's calls, including the average recording score, average handle time, and the length of the longest call. Then, they can jump to the recording viewer and run pre-defined or ad-hoc queries of call recordings and stream the actual recordings.

## Interaction Statistics

The [Interaction Statistics](#) portlet displays current call center statistics and charts for the specified workgroup. It links to the statistics carousel where supervisors can view an automatically rotating display of various statistics and charts.

## Call Monitoring

The [Call Monitoring](#) portlet allows supervisors to listen to agents on live telephone calls as a means of judging agent performance.

## Historical Reports

The [Historical Reports](#) portlet displays the run information for the most recent or upcoming reports. Click the **Show Reports** link to view detailed lists of the available reports, recent reports, and upcoming reports. Supervisors can download, view, or email any of the recent reports.

## Portal Management

The Portal Management portlet is where the administrator sets up organizations, users, and workgroups, and configures a wide range of settings, including security, service-level indicators, and announcements. It is also where the administrator configures settings for the other four portlets.

**Note:** The portlets you see and the functions you can perform within the portlets are based on your user role and the features to which you have access. For example, users with the Agent role will only see the Call Recordings portlet. For more information, see [User Roles](#).

Rev. November 13, 2019

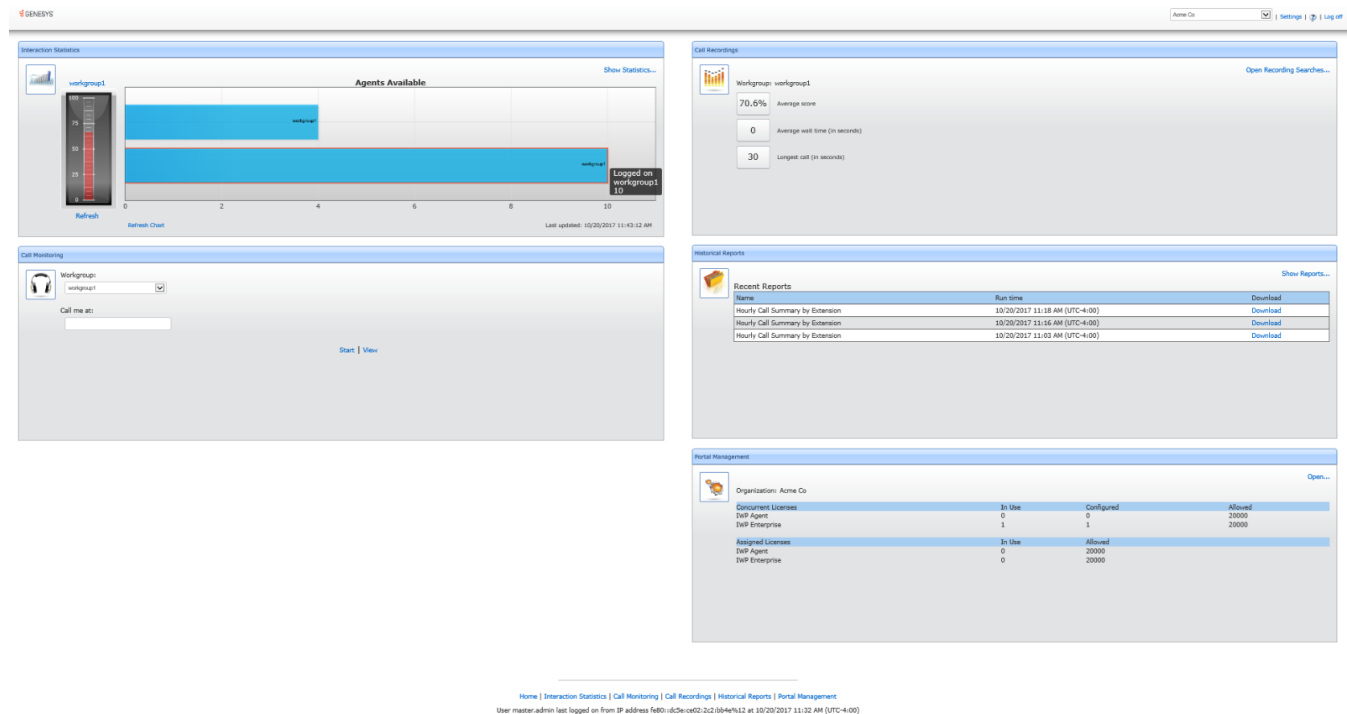
## Requirements

Refer to the [Interaction Web Portal and Interaction Marquee Installation and Configuration Guide](#) for browser and other requirements.

# Interaction Web Portal User Interface

This is the interface in its default configuration with sample data. Your administrator may have configured your portal to look differently for your organization.

Move your mouse over the interface elements in the following graphic to become familiar with all parts of the portal home page.



## Change Your Password

Your organization might require that you change your user password the first time you log on to Interaction Web Portal. After the first time you log in, your organization's password policy determines how frequently you need to change your password, the number of characters it must contain, and so on.

To change your password:

1. Click the **Settings** link in the heading section of the **Home** page.
2. On the **Settings** page, specify your current password in the **Old Password** box.
3. Specify the new password in the **New Password** box and then again in the **Confirm** box.
4. Click **Change Password**.

**Note:** Your administrator determines the minimum password length and complexity. For information on your organization's password requirements, contact your administrator.

## View Announcements

When you log on to Interaction Web Portal, if there are any announcements, a **Messages** banner appears across the top of the portal Home page. If you have not yet viewed any of the messages, the number of new messages appears in the **Messages** banner.

Click on the chevron (down arrow) at the right side of the banner to expand the **Messages** area and display the messages. Note that both system-level announcements and organization-level announcements appear here and remain there until the expiration date and time.

**Note:** System-level announcements appear for users in all organizations, while organization-level announcements only appear for users assigned to that organization.

## Access Control

Users need to have access control rights assigned in Interaction Administrator. For more information, see the administrator who maintains configuration settings in Interaction Administrator.

# Work with Call Recordings

The Interaction Web Portal Call Recordings portlet displays statistics for call recordings and allows you to open the recording viewer.

The call recording statistics that appear on the Home page are:

- **Average score** – An average that is based on all of the workgroup's scorecards that were finished over the past 30 days.
- **Average wait time (in seconds)** – The total time during which different ACD interactions waited in the workgroup queue before they were ACD-assigned, divided by the number of ACD interactions for the specified period.
- **Longest call (in seconds)** – The duration of the longest, currently active, inbound ACD interaction for the workgroup. This value defaults to 0 if there are no active inbound ACD interactions.

In the recording viewer, you can:

- [View predefined queries](#) of recordings, based on agent, workgroup, or custom attributes.
- [Create a custom query](#) to view a list of recordings.
- [Listen to, stream, and download recordings.](#)

When you select a specific recording, that recording is loaded into the media player and you can do any of the following:

- Click **Next** to load the next recording into the media player.
- Click **Previous** to load the previous recording into the media player.
- Click **Play** to stream the recording.
- Click **Pause** to pause the audio. The audio buffer continues to stream down to the recording viewer.
- Click **Refresh** to refresh the query.
- Click **Download this recording** to download the selected recording to a local directory. An administrator must enable this feature.
- View the scorecards associated with a recording.
- Move the volume control to adjust the volume of the audio.

A recording state bar at the top of the recording viewer displays the state of the recording (buffering, playing, or recording), followed by the recording ID.

An audio progress bar advances as a recording is played. A small circle indicates the current position in the recording. The user can move the indicator to the right to move forward in the recording or to the left to replay a portion of the recording.

**Warning:** Genesys disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of ICME software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

## See Also

[Access to Recordings](#)

[Call Recordings Terminology](#)

[Query Recordings](#)

[Stream a Recording](#)

[Download a Recording](#)

[View Scorecards](#)

[Set Recording Options](#)



# Work with Call Recordings

The Interaction Web Portal Call Recordings portlet displays statistics for call recordings and allows you to open the recording viewer.

The call recording statistics that appear on the Home page are:

- **Average score** – An average that is based on all of the workgroup's scorecards that were finished over the past 30 days.
- **Average wait time (in seconds)** – The total time during which different ACD interactions waited in the workgroup queue before they were ACD-assigned, divided by the number of ACD interactions for the specified period.
- **Longest call (in seconds)** – The duration of the longest, currently active, inbound ACD interaction for the workgroup. This value defaults to 0 if there are no active inbound ACD interactions.

In the recording viewer, you can:

- [View predefined queries](#) of recordings, based on agent, workgroup, or custom attributes.
- [Create a custom query](#) to view a list of recordings.
- [Listen to, stream, and download recordings.](#)

When you select a specific recording, that recording is loaded into the media player and you can do any of the following:

- Click **Next** to load the next recording into the media player.
- Click **Previous** to load the previous recording into the media player.
- Click **Play** to stream the recording.
- Click **Pause** to pause the audio. The audio buffer continues to stream down to the recording viewer.
- Click **Refresh** to refresh the query.
- Click **Download this recording** to download the selected recording to a local directory. An administrator must enable this feature.
- View the scorecards associated with a recording.
- Move the volume control to adjust the volume of the audio.

A recording state bar at the top of the recording viewer displays the state of the recording (buffering, playing, or recording), followed by the recording ID.

An audio progress bar advances as a recording is played. A small circle indicates the current position in the recording. The user can move the indicator to the right to move forward in the recording or to the left to replay a portion of the recording.

**Warning:** Genesys disclaims any responsibility for end-user or licensee to comply with federal or state law restrictions regarding Record or Listen capabilities of ICME software. The licensee hereby warrants and represents that the end-user or licensee will use the product in compliance with any federal or state law.

## See Also

[Access to Recordings](#)

[Call Recordings Terminology](#)

[Query Recordings](#)

[Stream a Recording](#)

[Download a Recording](#)

[View Scorecards](#)

[Set Recording Options](#)

## Access to Call Recordings

A user must have the [Recordings feature role](#) to see the Call Recordings portlet in Interaction Web Portal.

### Access to Queries

The [user role](#) determines which types of queries a user can access.

The following table indicates the types of queries that are accessible by each user role.

Query Type	Master Admin	Organization Admin	Delegated Admin	Enterprise	Agent (Associated CIC user)
Recorder client assigned queries	X	X	X	X	
Ad-hoc queries by workgroup name	X	X	X	X	
Ad-hoc queries by workgroup and agent name	X	X	X	X	
Ad-hoc queries by a CIC user who is logged in	X	X	X	X	X
Ad-hoc queries by a scored user	X	X	X	X	X

### Access to Other Recording Features

The following table indicates which tasks are accessible by user role.

Task	Master Admin	Organization Admin	Delegated Admin	User
Assign Recording Searches to an Organization	X			
Configure Recording Settings	X	X		

# Call Recording Terminology

Understanding the following terms will help you use the Call Recordings portlet in Interaction Web Portal.

---

## Recordings

In Interaction Web Portal, recordings are phone call interactions that are recorded and saved on your Interaction Recorder server. You can create these recordings manually, such as when you click the **Record** button in the CIC client, or Customer Interaction Center (CIC) users, workgroups, roles, or telephone numbers can create them automatically. The Call Recordings portlet in Interaction Web Portal allows you to access these recordings, as long as you have the required rights.

---

## Recording Details

Each recording has many attributes, or details. These attributes include the date and time for which the recording was made, the name of the CIC client user participating in the call, and other details. These details are saved with the recording so that you can search for groups of recordings based on their details.

---

## Queries

Queries are pre-defined or ad-hoc searches you can use to search for recordings across one or more categories. Pre-defined queries are defined in Interaction Recorder and you can select one to run from the Call Recordings portlet. You can also run your own ad-hoc queries from the Call Recordings portlet by specifying the date and time range, workgroups, and users for which you want to filter the call recording data.

---

## Scorecard

Scorecards contain questions that pertain to recordings are used for quality control purposes and to evaluate agents' performance. In Interaction Web Portal, you can view any completed scorecards that are associated with a recording.

---

## Search Recordings

Queries allow you to request a list of recordings based on the filter criteria you specify.

---

## Accessing Recording Searches

You can access pre-defined queries or run ad-hoc queries from the recording viewer.

### To access recording queries:

Do one of the following:

- Click **Open Recording Searches** in the **Call Recordings** portlet on the Interaction Web Portal home page.
- Click the **Call Recordings** link in the Interaction Web Portal footer.

The recording viewer appears.

---

## Types of Searches

There are two types of recording queries in Interaction Web Portal:

- **Pre-defined searches** - These are queries that were already defined in Interaction Recorder. You can access pre-defined queries in Interaction Web Portal if you have the appropriate rights.
  - **Custom searches** - These are queries you run in Interaction Web Portal to view a list of recordings. You can filter the list for a particular ranges of dates/times, workgroups, and users.
- 

## Run a Pre-defined Search

You can create pre-defined queries in Interaction Recorder, but you can access them from Interaction Web Portal if you have the appropriate rights.

**To select and run a pre-defined query:**

- In the recording viewer, select the query from the **Pre-defined** queries list.

The list of recordings appears in the recording viewer.

---

## Run a Custom Search

A custom query lets you quickly display a list of call recordings that match the criteria you specify. When you run a custom search, Interaction Web Portal uses the Service Administrator account to check the security policies and not your account.

**Note:** Before you can run a custom query, your administrator must enable ad-hoc queries for your organization. For more information, see your administrator. Also, users with associated CIC accounts must have a license for feedback surveys or the option to search surveys does not appear in the portlet.

**To run a custom query:**

1. In the recording viewer, click **Run custom search**.

The **Custom recording search** dialog box appears.

2. From the **Search for** list, select the type of recordings to include. Options include Recordings, Only scored recordings, Only surveyed interactions, and Scored recordings or surveyed interactions.  
The Scored recordings or surveyed interactions options return recording and feedback scores and allow users to open the scorecard and feedback survey associated with each result.
3. If you select one of the scored recordings options and you only want to include scorecards that require a supervisor to sign off, select the **Scorecard sign-off needed** check box.
4. Specify the date/time range for the query. These fields default to the last dates and times that were entered.

**Note:** An administrator can specify a maximum number of days to include in this date range.

5. From the list of workgroups, select the check box for each workgroup for which you want to retrieve recordings.
6. In the **Find scorecards/surveys from specified users** box, specify a list of users for whom you want to retrieve recordings.
7. Click **Search**.  
The list of recordings appears in the recording viewer.

---

## Maximum Number of Recordings

The default maximum number of recordings that Interaction Web Portal displays in search results is 250, but your administrator can change that number.

---

## Refresh a Query

You can refresh query results to view any updates that have been made since the query results were last displayed.

**To refresh a query:**



- Click the **Refresh last query** button to update the current query with the latest data.

**See Also**

[Stream a Call Recording](#)


[Download a Call Recording](#)

[View a Recording Scorecard](#)







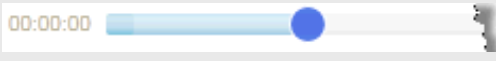
# Stream a Call Recording

Once you perform a [recording query](#), you can listen to, or *stream*, any of the resulting recordings.

To stream a call recording:

Select a recording from the query results, and then click the **Play recording** button .

The recording viewer uses standard media player buttons:

Click this button...	To...
	Play a recording,
	Stop playing a recording.
	Pause a recording.
	Select the next recording in the search results.
	Select the previous recording in the search results.
	Adjust the volume.
	Move to a different location in the recording.


# Download a Recording

Interaction Web Portal allows you to download a recording to a .wav file.

**Note:** Your administrator can disable the download feature for your organization. If that is the case, you will not see the Download button on the recording viewer.

To download a recording:

1. Select the recording from a recording query. For more information, see [Query Recordings](#).

2. In the top right corner of the recording viewer, click the **Download** button .

The **Save As** dialog box appears.


3. Select a location for the file, and then click **Save**.

## View Scorecards

Interaction Web Portal allows you to view scorecards that were completed in Interaction Recorder, if you have access. IWP displays the set of answers, values, and total scores from the scorecards that are complete and associated with the selected recording.

To view scorecards, you need access to Questionnaire Groups. This is configured in Interaction Administrator. Contact your system administrator for more information.

**To view a scorecard:**

1. Locate the scored recording using a recording query. For more information, see [Query Recordings](#).
2. In the top right corner of the recording viewer, click the scorecard icon  to view the scorecard.

## Set Recording Options for an Organization

An administrator can do any of the following to configure call recording options on the **Recordings** tab under **Portal Management**:

- [Enable or disable the Call Recordings portlet for the current organization.](#)
- [Specify the workgroup for which members of the selected organization can access recordings.](#)
- [Specify the path and URL for the Recording Server.](#)
- [Specify the available recording queries and indicate whether or not users can save recordings.](#)
- [Specify which columns of data should appear in the Recording Viewer.](#)
- [Specify which properties to display in the recording details.](#)

---

### Enabling or Disabling the Call Recordings Portlet

If an organization does not plan to use the Call Recordings portlet, you can hide it.

Do one of the following:

- To hide the Call Recordings portlet, clear the **Enabled** check box.
- To show the portlet, select the **Enabled** check box.

---

### Welcome Page Settings

Select the workgroup for which you want to display statistics in the Call Recordings portlet on the Interaction Web Portal Home page. The portlet displays the following statistics for that workgroup:

- Average score
- Average handle time (in seconds)
- Longest call (in seconds)

---

### Live Smooth Streaming

Live Smooth Streaming (IIS Media Services) is required to stream recordings. The path to the publishing point share and the publishing point URL are specified in the CIC server configuration in Portal Management, but you can override the default locations for a particular organization by setting the paths on the **Recordings** tab under **Portal Management**.

To set the Live Smooth Streaming locations for an organization:

1. In the **Publishing point share** field, specify the path to the where you want to store the recording files.
2. In the **Publishing point URL** field, specify the URL for the location from which recordings can be retrieved.

---

### Recording Query Settings

To modify the number of query results and select which data columns appear in the recording viewer when a query is run:

1. Clear the **Allow ad-hoc queries** check box if you want to hide the **Run ad-hoc search** button in the recording viewer. By default, ad-hoc queries are enabled.

2. Select the **Allow recordings to be saved** check box if you want the **Download this recording** button to appear in the recording viewer, or clear the check box to hide the button.
  3. In the **Max recording search result size** box, specify the maximum number of recordings to display when a query is run. The default value is 250.
  4. In the **Max previous days to allow for searches** box, specify the maximum number of days to include in the date range for ad-hoc recording queries. For example, you can specify that users can only display results for up to 90 days.
  5. Under **Available Searches**, select the list of predefined queries that you want to be available to run, and then click **Add >>** to add them to the **Selected Searches** list. Note that the queries listed in the **Available Searches** box come from Interaction Recorder.
  6. To remove any searches from the organization, select them in the **Selected Searches** list, and then click **<< Remove**.
- 

## Recording Column Properties

You can configure which data columns are displayed in the recording viewer.

To add or remove data columns:

1. Select any columns you want to add in the **Available Properties** list, and then click **Add >>** to add them to the **Visible Properties** list. The columns in the **Visible Properties** list are the ones that appear in the recording viewer.
  2. Select any visible columns that you want to hide in the **Visible Properties** list, and then click **<< Remove** to hide them.
- 

## Recording Detail Properties

You can also configure the data fields that appear in the recording detail.

To add or remove data fields to the recording detail:

1. Select any data fields you want to add in the **Available Properties** list, and then click **Add >>** to add them to the **Visible Properties** list. The columns in the **Visible Properties** list are the ones that appear in the recording viewer.
  2. Select any visible columns that you want to hide in the **Visible Properties** list, and then click **<< Remove** to return them to the Available Properties list and hide them in the recording viewer.
- 

## Save Your Changes

Click **Save** to save your changes to click on an another tab to make more changes for the same organization.

If you click on a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.

## Work with Statistics

The Statistics portlet displays a Service Level thermometer control that indicates the percentage of interactions that met service-level requirements.

It also displays the first statistic configured in the statistics carousel (or in Portal Management). View the [available statistics](#).

You can click **View Statistics** to view the statistics carousel.

You can:

- [Refresh the statistics that appear in the Statistics portlet on the Home page.](#)
- [Change the service-level indicator workgroup and interval.](#)
- [View the statistics carousel.](#)
- [Add new statistics to the carousel.](#)
- [Modify the chart types.](#)
- [Set the parameters, intervals, and/or date ranges for the statistics.](#)
- [Run reports related to a statistics panel.](#)

---

### Change the Service-Level Indicator Workgroup and Interval

The service-level indicator is a thermometer-like chart that appears in the Interaction Statistics portlet. It indicates the percentage of interactions that are within specified service-level criteria.

Your administrator determines the default workgroup, interaction type, interval, and accumulative histogram for which the service-level indicator displays data. You can override these defaults, however, and select different settings.

**To change the settings for the service-level indicator:**

1. Click the name of the workgroup above the service-level indicator.
2. In the **Service Level Configuration** dialog box, select the following to indicate the criteria used to display data in the service-level indicator:
  - The workgroup.
  - The interaction type.
  - The interval. Intervals correspond to the intervals that are configured on the **Report Configuration** tab in the server configuration in Interaction Administrator.The default intervals are as follows:

Service Level	Default Interval
Service Level Distribution 1	0-10 seconds
Service Level Distribution 2	0-20 seconds
Service Level Distribution 3	0-30 seconds
Service Level Distribution 4	0-40 seconds
Service Level Distribution 5	0-50 seconds
Service Level Distribution 6	0-60 seconds

- Select an interval from the accumulative histogram list. The accumulative histogram summarizes interactions that are serviced in that interval and displays the results in the workgroup's service level indicator. The available intervals depend on the selected interaction type. For example, if you select the Call interaction type and the 0-120s accumulative histogram interval, then the service level indicator displays a summary of the call interactions that were serviced within 120 seconds.
3. Click **OK**.

---

### Refresh the Statistics on the Home page

To refresh the service-level indicator, click **Refresh** below the thermometer control.

To refresh the chart displayed in the Statistics portlet, click **Refresh Chart** below the chart.



---

## View the Statistics Carousel

To view the statistics carousel, do one of the following:

- Click **Show Statistics** in the Statistics portlet.
- In the Interaction Web Portal footer, click **Interaction Statistics**.

The statistics carousel appears.

Note the following:

- By default, the data in the carousel refreshes every 15 seconds. A user can select a different refresh interval in the statistics carousel page.
- The carousel rotates at an interval selected by your administrator, but you can override that with your own interval setting. The interval you select from the list below the carousel will be saved locally.
- You can manually rotate the carousel by clicking the dots or arrows next to the interval setting.

---

## Add New Statistics to the Carousel

New statistics must be added by an administrator who has access to your organization. For more information, see [Set Statistics Options](#).

---

## Modify Chart Types

Statistics charts can appear in several formats:

- Label value pairs
- Bar charts
- Column charts
- Line charts
- Pie charts

The format of a chart is determined when it is made available by the administrator. For more information, see [Set Statistics Options](#).

---

## Modify Chart Parameters and Dates

Like chart types, chart parameters and dates are determined by the administrator for your organization. For more information, see [Set Statistics Options](#).

---

## Run a Report Related to a Statistic

The Run Related Report feature allows you to run a report and email the output to one or more email addresses.

If there is a report related to a statistics panel in the carousel, the **Run related report** link appears in the lower left corner of the panel when it appears in the carousel.

To run a related report:

1. Click the **Run related report** link.

The **Run Related Report** dialog box appears.

2. Specify the email addresses to which you want to send the output, typing one email address per line.
3. Click **OK**.

A confirmation message box appears, listing the email addresses.

4. Click **OK**.

### See Also

[Available Statistics](#)

[Access to Statistics](#)

[Set Statistics Options](#)

## Work with Statistics

The Statistics portlet displays a Service Level thermometer control that indicates the percentage of interactions that met service-level requirements.

It also displays the first statistic configured in the statistics carousel (or in Portal Management). View the [available statistics](#).

You can click **View Statistics** to view the statistics carousel.

You can:

- [Refresh the statistics that appear in the Statistics portlet on the Home page.](#)
- [Change the service-level indicator workgroup and interval.](#)
- [View the statistics carousel.](#)
- [Add new statistics to the carousel.](#)
- [Modify the chart types.](#)
- [Set the parameters, intervals, and/or date ranges for the statistics.](#)
- [Run reports related to a statistics panel.](#)

---

## Change the Service-Level Indicator Workgroup and Interval

The service-level indicator is a thermometer-like chart that appears in the Interaction Statistics portlet. It indicates the percentage of interactions that are within specified service-level criteria.

Your administrator determines the default workgroup, interaction type, interval, and accumulative histogram for which the service-level indicator displays data. You can override these defaults, however, and select different settings.

**To change the settings for the service-level indicator:**

1. Click the name of the workgroup above the service-level indicator.
2. In the **Service Level Configuration** dialog box, select the following to indicate the criteria used to display data in the service-level indicator:

- The workgroup.
- The interaction type.
- The interval. Intervals correspond to the intervals that are configured on the **Report Configuration** tab in the server configuration in Interaction Administrator.

The default intervals are as follows:

Service Level	Default Interval
Service Level Distribution 1	0-10 seconds
Service Level Distribution 2	0-20 seconds
Service Level Distribution 3	0-30 seconds
Service Level Distribution 4	0-40 seconds
Service Level Distribution 5	0-50 seconds
Service Level Distribution 6	0-60 seconds

- Select an interval from the accumulative histogram list. The accumulative histogram summarizes interactions that are serviced in that interval and displays the results in the workgroup's service level indicator. The available intervals depend on the selected interaction type. For example, if you select the Call interaction type and the 0-120s accumulative histogram interval, then the service level indicator displays a summary of the call interactions that were serviced within 120 seconds.
3. Click **OK**.

---

## Refresh the Statistics on the Home page

To refresh the service-level indicator, click **Refresh** below the thermometer control.

To refresh the chart displayed in the Statistics portlet, click **Refresh Chart** below the chart.

---

## View the Statistics Carousel

To view the statistics carousel, do one of the following:

- Click **Show Statistics** in the Statistics portlet.
- In the Interaction Web Portal footer, click **Interaction Statistics**.

The statistics carousel appears.

Note the following:

- By default, the data in the carousel refreshes every 15 seconds. A user can select a different refresh interval in the statistics carousel page.
  - The carousel rotates at an interval selected by your administrator, but you can override that with your own interval setting. The interval you select from the list below the carousel will be saved locally.
  - You can manually rotate the carousel by clicking the dots or arrows next to the interval setting.
- 

## Add New Statistics to the Carousel

New statistics must be added by an administrator who has access to your organization. For more information, see [Set Statistics Options](#).

---

## Modify Chart Types

Statistics charts can appear in several formats:

- Label value pairs
- Bar charts
- Column charts
- Line charts
- Pie charts

The format of a chart is determined when it is made available by the administrator. For more information, see [Set Statistics Options](#).

---

## Modify Chart Parameters and Dates

Like chart types, chart parameters and dates are determined by the administrator for your organization. For more information, see [Set Statistics Options](#).

---

## Run a Report Related to a Statistic

The Run Related Report feature allows you to run a report and email the output to one or more email addresses.

If there is a report related to a statistics panel in the carousel, the **Run related report** link appears in the lower left corner of the panel when it appears in the carousel.

To run a related report:

1. Click the **Run related report** link.

The **Run Related Report** dialog box appears.

2. Specify the email addresses to which you want to send the output, typing one email address per line.
3. Click **OK**.

A confirmation message box appears, listing the email addresses.

---

4. Click **OK**.

#### See Also

[Available Statistics](#)

[Access to Statistics](#)

[Set Statistics Options](#)

[Set Service-Level Indicator Default Settings](#)

## Available Statistics

The following describes the statistics that are available in Interaction Web Portal.

**Note:** The memory footprint (RAM Utilization) of StatServerAgent.exe increased by 14% (~ 0.4 GB) with the addition of the following Agent statistics:

- Agent Keyword Spotted
- Average Agent Negative Score
- Average Agent Positive Score
- Average Customer Negative Score
- Average Customer Positive Score
- Customer Keyword Spotted
- Total Agent Positive Score
- Total Agent Negative Score
- Total Customer Positive Score
- Total Customer Negative Score

Statistic Name	Description
Abandoned Rate Distribution	The percentage of interactions where the caller disconnected before being connected to an agent.
Abandon Rate Missed Target	Abandon rate missed target
Abandon Rate Target	The target percentage of interactions that are abandoned.
Active social conversations	Number of active social conversations in the system.
Active social direct messages	Number of active direct messages in the system.
Agent Keyword Spotted	This statistic represents the last agent keyword spotted during the last interaction handled by this agent.
Agents available	The Available Agent Count of logged on agents that are available for ACD interactions. See definitions for Logged On and Available to take ACD interactions.
Agents in status	The number of agents in the specified workgroup with the specified status.

Agents logged in on this workgroup	The number of agents logged in under the specified workgroup.
Available for ACD interactions	<p>The number of agents who are available to take ACD interactions. An agent is considered available to take ACD interactions if all of the following conditions are met:</p> <ul style="list-style-type: none"> <li>• The agent is logged in.</li> <li>• The agent is activated on the specified workgroup.</li> <li>• The agent is not on another interaction.</li> <li>• The agent has an available status.</li> </ul> <p>Note that agent utilization does not apply to this statistic. This statistic assumes that each agent can only take one interaction at a time.</p>
Average agent negative score	The sum of agent negative scores divided by the total number of calls in the current or previous period or shift.
Average agent positive score	The sum of agent positive scores divided by the total number of calls in the current or previous period or shift.
Average customer negative score	The sum of customer negative scores divided by the total number of calls in the current or previous period or shift.
Average customer positive score	The sum of customer positive scores divided by the total number of calls in the current or previous period or shift.
Average hold time	The average hold time of all interactions for the specified interval and workgroup.
Average talk time	Average talk time of all interactions for the specified interval and workgroup.
Average wait time	Average wait time in queue of all interaction during the specified period.
Customer Keyword Spotted	This statistic represents the last customer keyword spotted during the last interaction handled by this agent.
Highest active agent positive score	This statistic represents the highest positive score that an agent has accumulated in an active interaction in this workgroup. This cumulative score does not include negative scores that occurred during the interaction.
Highest active customer positive score	This statistic represents the highest positive score that a customer has accumulated in an active interaction in this workgroup. This cumulative score does not include negative scores that occurred during the interaction.
Interactions abandoned	The number of interactions that were externally disconnected by the remote party before they could be picked up by an agent. The CIC data dictionary provides supplemental information about abandoned calls.
Interactions answered	Number of ACD interactions answered by the specified workgroup.
Interactions completed	Number of interactions that were completed by the specified workgroup.
Interactions flowed-out	Number of interactions that were rerouted out of the ACD.

Interactions held	Number of ACD interactions that were placed on the hold for the specified workgroup.
Interactions on hold	The number of ACD interactions on hold for the specified workgroup.
Interactions received	The number of ACD interactions received for the specified workgroup.
Interactions waiting	Number of ACD interaction waiting in the queue for the specified workgroup.
Logged in	The number of agents logged in for the specified workgroup. This is also the number of agents who are logged into the current server and does not include agents who are logged into peer servers for the same workgroup.
Logged in + activated	The number of agents logged in and activated for the current workgroup. This includes the number of agents who are logged into and activated on the current server and does not include agents logged into peer servers for the same workgroup.
Longest available	The longest duration of time in which an agent is available to take an ACD interaction for the specified workgroup.
Longest hold time	The hold time of the longest currently held interaction.
Longest inbound ACD interaction	Duration of the longest of the currently active inbound ACD interactions, or 0 if there is no inbound ACD interaction active. The duration does not include wait time or answer time. It is the time it takes for an interaction to be handled by an agent in a queue (excluding wrap time), from first connect to queue removal/disconnect.
Longest interaction waiting	The time of the longest currently waiting interaction. This interaction has been in the ACD - Wait Agent state the longest. Its duration is the amount of time that the interaction has waited to be picked up by an available agent, based on time in queue only. Supervisor workflow statistics always pertain to time in a workgroup or user interaction. Overall time in the system (such as time in IVR) is not counted.
Longest non-ACD interaction	Longest duration of the currently active non-ACD interactions (0 if there are none).
Longest outbound ACD interaction	Longest duration of the currently active outbound ACD interactions (0 if there are none).
Longest social conversation	Duration of the longest social conversation currently in the system.
Longest social direct message	Duration of the longest direct message currently in the system.
Longest talk time	The total talk time of the longest currently connected interaction.
Lowest active agent negative score	The lowest of the agent negative scores for active calls.
Lowest active customer negative score	The lowest of the customer negative scores for active calls.

Not available for ACD interactions	The number of agents not available to take ACD interactions.
On inbound ACD interactions	The number of agents on inbound ACD interactions.
On inbound ACW	Number of agents in follow-up (After Call Wrap-up) mode after being on inbound ACD interactions.
On non-ACD interactions	The number of agents on inbound and outbound non-ACD interactions.
On outbound ACD interactions	Number of agents on outbound ACD interactions.
On outbound ACW	Number of agents in follow-up (After Call Wrap-up) mode after being on outbound ACD interactions.
Percent available	The percentage of logged in agents who are available for ACD interactions ((# available to take ACD interactions / # logged in) * 100).
Service level distribution	The percentage of interactions that entered the queue and went into an ACD-assigned state (connected to an agent) within the specified time interval.
Service level missed target	Service level missed target
Service level target	The target percentage of calls to answer within a specific number of seconds.
Total Agent Negative Score	This statistic represents the total negative score that this agent has accumulated in all interactions. This cumulative score does not include positive scores that occurred during the interactions.
Total Agent Positive Score	This statistic represents the total positive score that this agent has accumulated in all interactions. This cumulative score does not include negative scores that occurred during the interactions.
Total agents	Total number of agents in the specified workgroup. This is typically the number of users who are members of the specified workgroup on the current server and does not include members of the same workgroup on peer servers.
Total Customer Negative Score	This statistic represents the total negative cumulative score for customer interactions handled by this agent. This cumulative score does not include positive scores that occurred during the interactions.
Total Customer Positive Score	This statistic represents the total positive cumulative score for customer interactions handled by this agent. This cumulative score does not include negative scores that occurred during the interactions.
Total hold time	Total amount of time that ACD interactions were on hold.
Total talk time	Total amount of time that all agents spent on ACD interactions.
Total wait time	Total amount of time that ACD interactions waiting in the Workgroup queue before they were ACD assigned.

**Note:** If your organization has a license for Interaction Dialer, the Dialer statistics are also available. In order to leverage these statistics, you must create an Interaction Web Portal account associated with an IC user on a Dialer licensed IC server. Next, add that user as an Organization Administrator and log on with that account to create Dialer-based statistics panels.

## Access to Statistics

A user must have the [Statistics feature](#) to see the Interaction Statistics portlet in Interaction Web Portal.

The following table indicates which [user roles](#) are required to perform statistics-related tasks.

Task	Master Admin	Organization Admin	Delegated Admin	Enterprise	Agent
View statistics.	X	X	X	X	
Determine chart order and set the default chart.	X	X	X		
Configure statistics settings.	X	X			
Create, edit, and delete statistics charts.	X	X	X		



# Set Statistics Options for an Organization

An administrator can configure the following options for statistics on the **Statistics** tab under **Portal Management**.

---

## Enabling or Disabling the Statistics Portlet

If an organization does not plan to use the Statistics portlet, you can hide it.

Do one of the following:

- To hide the Statistics portlet, clear the **Enabled** check box.
- To show the portlet, select the **Enabled** check box.

---

## Default Rotation Interval for the Statistics Carousel

The Initial Rotation Interval determines the default interval at which the statistics carousel switches to the next statistic. This value is set for the organization, but a user can set their individual preference below the Statistics Panel to override this value. A user's individual preference is stored locally on his or her machine.

The available intervals are:

- Thirty Seconds
- One Minute
- Two Minutes
- Five Minutes
- Ten Minutes
- Fifteen Minutes
- Thirty Minutes
- One Hour
- Manual

**Note:** When set to Manual, the statistics do not rotate. The user must click the arrows or dot controls to display a new statistic.

---

## Statistics Panels

In the Statistics Panels section, you can specify the chart panels you want to appear in the statistics carousel for the users in the current organization. Each chart panel can contain one or more statistics.

You can also specify the following:

- The type of chart to display (label value pair, bar chart, column chart, or line chart) for a statistic.
- Any related reports to display for a statistic.
- Whether or not statistics can be viewed on mobile devices.

[Add a Chart Panel](#)

[Edit a Chart Panel](#)

[Delete a Chart Panel](#)

[Reorder the List of Chart Panels](#)

---

## Save Your Changes

Click **Save** to save your changes to click on an another tab to make more changes for the same organization.

If you click on a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.

## Set Service Indicator Default Settings

Interaction Web Portal uses the service-level indicator settings to help you monitor the percentage of interactions that are within specified service-level criteria.

A service-level indicator appears on the portal's Home page in the Statistics portlet. The settings you specify here determine the workgroup for which the indicator is displayed, the type of interactions included, the time interval, and accumulative histogram. Note that a user can override the default settings by changing the workgroup or interval from the Statistics portlet. For more information about overriding the default settings, see [Change the Service-Level Indicator Workgroup and Interval](#).

To set the default settings:

1. On the **Service Indicator** tab under **Portal Management**, do one of the following:
  - To enable the indicator, selected the **Enabled** check box.
  - To disable the indicator, clear the **Enabled** check box.
2. From the **Workgroup** list, select the workgroup for which the indicator should display service-level results. This setting changes the default workgroup. A user can select a different workgroup.

**Note:** Once a user opens the portal **Home** page, any changes to the default workgroup do not apply to that user.

3. From the **Interaction Type** list, select the appropriate interaction type to include in the service-level indicator. The available options are All objects, Call, Chat, Generic, and Callback.
4. From the **Service Level Interval** list, select the time period that you want the service-level indicator to represent. The service level intervals correspond to the service levels that are configured in Interaction Administrator on the **Configuration** page under **Workgroup Configuration**.

**Note:** Once a user opens the portal **Home** page, any changes to the default service level interval do not apply to that user.

5. From the **Accumulative histogram** list, select an interval. The accumulative histogram summarizes interactions that are serviced in that interval and displays the results in the workgroup's service indicator in the Interaction Statistics portlet. The available intervals depend on the selected interaction type. For example, if you select the Call interaction type and the 0-120s interval under **Accumulative histogram**, then the service indicator on the **Home** page displays a summary of the call interactions that were serviced within 120 seconds.
6. Click **Save** to save your changes to the organization.

# Change the Statistics Update and Rotation Intervals

Statistics chart panels appear in the statistics carousel, and Interaction Web Portal can rotate between chart panels at a specified interval. If an organization has more than one statistics chart panel, the statistics carousel rotates between them at a specified interval.

Interaction Web Portal also refreshes the data in the chart panels at a specified interval.

Master administrators and organization administrators can set the default rotation interval. Users can change their own rotation setting to override the default interval and can set the update interval. There is no default update interval.

---

## Setting the Default Rotation Interval (Administrators)

You must be a master or organization administrator to set the default rotation interval. All other users do not have access to the default rotation setting and can set their own rotation interval. For more information, see the next section.

**To set the default rotation interval:**

1. Under **Portal Management**, select the organization.
2. Click the **Statistics** tab.
3. Under **Statistics Settings**, do one of the following:
  - To specify an interval, select the interval from the **Initial Rotation Interval** list. The available intervals range from 30 seconds to an hour.
  - To specify the manual setting so that users must click between chart panels, select **Manual** from the **Initial Rotation Interval** list.
4. Click **Save**.

---

## Setting Your Own Rotation and Update Intervals (Users)

You can override the default rotation interval that your administrator set. You can also specify the interval at which the data on the statistics chart panels automatically refreshes.

**To set the intervals:**

1. In the **Interaction Statistics** portlet, click **Show Statistics** to view the statistics carousel.
2. Do one of the following:
  - Under the chart panel, select the appropriate rotation interval from the **Rotate every** list. The available intervals range from 30 seconds to an hour.
  - To turn off automatic rotation, select **Manual** from the **Rotate every** list. You can still rotate between chart panels, but you'll need to click to change to the next panel.
3. From the **Update every** list, select the interval at which you want to refresh the data on the chart panels. The available intervals range from one second to ten minutes.

The chart panels begin to rotate and update at the specified intervals.

### Related Topics

[Access to Statistics](#)

[Available Statistics](#)

[Work with Statistics](#)

[Edit a Chart Panel](#)

[Set Statistics Options for an Organization](#)

---

## Add a Chart Panel

A chart panel is a set of statistics that appear together on the statistics carousel. The statistics carousel can include multiple chart panels. The chart panel that appears first in the list of chart panels appears in the **Interaction Statistics** portlet on the **Home** page of the portal.

A chart panel can contain multiple statistics, but all statistics on a panel must have the same chart type (label value pair, bar, column, or line).

You must be an administrator to add chart panels.

### To add a chart panel to the statistics carousel:

1. In **Portal Management**, on the **Statistics** tab, click **Add Chart Panel**.  
  
The **Chart Panel Options** dialog box appears.
2. On the **General** tab, specify a chart title and description.
3. From the **Chart Type** list, select the appropriate chart type:
  - Label value pair
  - Bar chart
  - Column chart
  - Line chart
4. To allow mobile users to view the chart, select the **Mobile View Allowed** check box.
5. Click the **Statistics** tab.
6. Click **Add Statistic**. The default statistic and workgroup appear. Depending on the statistic, there may be additional options, such as interval or status.
7. From the **Statistic** list, select the statistic that you want to appear on the chart panel.
8. From the **Workgroup** list, select the name of the workgroup for which you want to display the statistic.
9. If there are additional options, such as interval or status, select the appropriate options.
10. Repeat steps 6 through 9 to add more statistics to the same chart panel.
11. Click the **Related Report** tab, if applicable, and select a report that relates to the chart panel.
12. Click **OK** to save the chart panel.

The new chart panel is added at the bottom of the list. Click **Up** or **Down** to modify its order in the carousel.

**Note:** The chart panel that appears at the top of the list is the one that appears in the Statistics portlet on the Home page of the portal.

13. Click **Save** when you are ready to save the changes to the organization.

---

## Add a Chart Panel

A chart panel is a set of statistics that appear together on the statistics carousel. The statistics carousel can include multiple chart panels. The chart panel that appears first in the list of chart panels appears in the **Interaction Statistics** portlet on the **Home** page of the portal.

A chart panel can contain multiple statistics, but all statistics on a panel must have the same chart type (label value pair, bar, column, or line).

You must be an administrator to add chart panels.

**To add a chart panel to the statistics carousel:**

1. In **Portal Management**, on the **Statistics** tab, click **Add Chart Panel**.  
  
The **Chart Panel Options** dialog box appears.
2. On the **General** tab, specify a chart title and description.
3. From the **Chart Type** list, select the appropriate chart type:
  - Label value pair
  - Bar chart
  - Column chart
  - Line chart
4. To allow mobile users to view the chart, select the **Mobile View Allowed** check box.
5. Click the **Statistics** tab.
6. Click **Add Statistic**. The default statistic and workgroup appear. Depending on the statistic, there may be additional options, such as interval or status.
7. From the **Statistic** list, select the statistic that you want to appear on the chart panel.
8. From the **Workgroup** list, select the name of the workgroup for which you want to display the statistic.
9. If there are additional options, such as interval or status, select the appropriate options.
10. Repeat steps 6 through 9 to add more statistics to the same chart panel.
11. Click the **Related Report** tab, if applicable, and select a report that relates to the chart panel.
12. Click **OK** to save the chart panel.

The new chart panel is added at the bottom of the list. Click **Up** or **Down** to modify its order in the carousel.

**Note:** The chart panel that appears at the top of the list is the one that appears in the Statistics portlet on the Home page of the portal.

13. Click **Save** when you are ready to save the changes to the organization.
- 

---

## Delete a Chart Panel

To delete a chart panel:

1. In the list of chart panels on the Statistics tab under Portal Management, click Delete next to the title and description.  
  
A Confirm message appears.
2. Click **OK** to confirm that you want to delete the panel.

---

## Edit a Chart Panel

To edit a chart panel:

1. On the Statistics tab under Portal Management, select the chart panel to edit, and then click Edit next to that chart panel description.

The Chart Panel Options dialog box appears.

2. Do any of the following:
  - Modify the chart title or description.
  - Modify the chart type.
  - Enable or disable viewing from mobile devices
  - Add or delete statistics from the chart panel.
  - Specify a related report.
3. Click **OK**.

---

## Reorder Chart Panels

You can modify the order in which chart panels appear in the statistics carousel.

To reorder chart panels:

- From the list of chart panels on the Statistics tab under **Portal Management**, click **Up** next to a chart panel to move it up one spot in the order, or click **Down** to move that chart panel down one spot in the order.

**Note:** The first chart panel in the list is the one that appears next to the service-level control in the Statistics portlet in the Home page of Interaction Web Portal. So, if there is a particular panel that you want to appear in the portlet, you should move it to the top of the list.

## View Historical Reports

Historical reports help you identify usage, trends, and adherence to service levels by your call center over specific periods of time. Historical reports are created in Interaction Scheduled Reports.

Note: Scheduled Reports now supports Interaction Reporter filters.

When you click **Show Reports**, the portlet displays these lists of reports if they exist:

- **Available Reports** - Reports your administrator has made available to your organization.
- **Upcoming Reports** - Reports that are scheduled to run.
- **Recent Reports** - Reports that were run and are ready for you to download or view.
- **Upcoming Reports** - Reports that are scheduled to run.

The reports that appear on the **Home** page are the most recent three reports that ran. If there are no recent reports to display, the portlet displays the first three reports that are scheduled to run.

Before a user can view a report in the **Historical Reports** portlet, the following must occur:

- An administrator must define the report in Interaction Administrator. For more information, see the Interaction Administrator help.
- An administrator must specify the report criteria, such as the workgroup, in Interaction Scheduled Reports.
- An administrator must make the report available to the user's organization in Interaction Web Portal. For more information about assigning reports to organizations, see [Set Reporting Options](#).

Users with access to reports can do the following:

- Download recent reports.
- Specify how often to run each available report and its destination and reporting period. Reports can be emailed or sent to a destination.

---

### Download Recent Reports

To download a recent report:

- In the report viewer, click **Download** next to the report name and date/time.

---

### Specify Information for Available Reports

To specify the frequency, destination, and date range, see [Edit Settings for an Available Report](#).

## View Historical Reports

Historical reports help you identify usage, trends, and adherence to service levels by your call center over specific periods of time. Historical reports are created in Interaction Scheduled Reports.

Note: Scheduled Reports now supports Interaction Reporter filters.

When you click **Show Reports**, the portlet displays these lists of reports if they exist:

- **Available Reports** - Reports your administrator has made available to your organization.
- **Upcoming Reports** - Reports that are scheduled to run.
- **Recent Reports** - Reports that were run and are ready for you to download or view.
- **Upcoming Reports** - Reports that are scheduled to run.

The reports that appear on the **Home** page are the most recent three reports that ran. If there are no recent reports to display, the portlet displays the first three reports that are scheduled to run.

Before a user can view a report in the **Historical Reports** portlet, the following must occur:

- An administrator must define the report in Interaction Administrator. For more information, see the Interaction Administrator help.
- An administrator must specify the report criteria, such as the workgroup, in Interaction Scheduled Reports.
- An administrator must make the report available to the user's organization in Interaction Web Portal. For more information about assigning reports to organizations, see [Set Reporting Options](#).

Users with access to reports can do the following:

- Download recent reports.
- Specify how often to run each available report and its destination and reporting period. Reports can be emailed or sent to a destination.

---

### Download Recent Reports

To download a recent report:

- In the report viewer, click **Download** next to the report name and date/time.

---

### Specify Information for Available Reports

To specify the frequency, destination, and date range, see [Edit Settings for an Available Report](#).



## Access to Reports

A user must have the [Reports feature](#) to see the Historical Reports portlet in Interaction Web Portal.

The following table indicates which [user roles](#) are required to perform statistics-related tasks.

Task	Master Admin	Organization Admin	Delegated Admin	Enterprise	Agent
View reports..	X	X	X	X	
Assign reports to organizations.	X				
Configure an organization's report settings.	X	X	X		

## Edit Settings for an Available Report

To edit the settings for an available report:

1. In the **Historial Reports** portlet, under **Available Reports**, click **Edit** next to the report.
2. The **View Report Detail** page appears. This page displays information about the report, report category, description, run dates, and parameters. This page displays information from Scheduled Reports and is view-only.
3. Click **Next**.

The **Specify Report Destination** page appears.

4. On this page, you can specify whether you want to email the report or send it to a URL. You can also specify the file format (Adobe Acrobat or Microsoft Excel) and for URLs, the overwrite frequency (Never, Daily, Weekly, Monthly, or Yearly).
5. Click **Next**.

The **Specify Report Frequency** page appears.

6. Specify the frequency, day(s) of the week, time of day. The next scheduled run date(s) appear.
7. Click **Next**.

The **Specify Report Range** page appears.

8. Click the option button next to the period.

Option	Description
Daily	Today or Yesterday
Weekly	Start day and end day of week
Monthly	This month, last month, one month before run date
Custom	Previous number of days or specific days.  For Previous number of days, specify number.  For Specific days, specify this month or last month and start and end dates.

Depending on the option you select, more date/time fields might appear.

9. Click **Finish**.

## Set Reporting Options

An administrator can configure the following reporting options on the **Reportings** tab under **Portal Management**.

**Note:** Schedule Reports is required and you must create reports for them to appear in the **Available Reports** list.

---

### Enabling or Disabling the Reporting Portlet

If an organization does not plan to use the Reporting portlet, you can hide it.

Do one of the following:

- To hide the Reporting portlet, clear the **Enabled** check box.
- To show the portlet, select the **Enabled** check box.

---

### Report Selection

From the **Available Reports** list, select the reports that the organization can access, and then click **Add >>** to move them to the **Selected Reports** list.

Or, to remove access to one or more reports, select the reports from the **Selected Reports** list and then click **<< Remove**.

---

### Save Your Changes

Click **Save** to save your changes or click on an another tab to make more changes for the same organization.

If you click on a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.

## Monitor Agents on Live Calls

Interaction Web Portal allows you to monitor agents on live calls, if you have the portal live monitor access control permission.

Supervisors typically monitor live calls to analyze agents' performance.

When a supervisor wants to monitor calls, Interaction Web Portal calls the supervisor on their phone, and then connects the call to the queue and agent.

A call can only be monitored if it is a new call or has been connected less than two seconds. This is because the greeting is an important part of monitoring the call.

### To monitor calls on a queue:

1. In the **Call Monitoring** portlet, or on the **Call Monitoring** page, select the name of the workgroup queue to monitor from the **Workgroup** list.
2. In the **Call me at** field, specify your extension or phone number.
3. Click **Start**.  
The Monitor Status changes to **Calling**, and Interaction Web Portal calls you back momentarily.
4. Pick up the call.  
The Monitor Status changes to **Waiting for call to enter workgroup**, and hold music plays until a call enters the queue.
5. Click **Disconnect** when you are ready to end call monitoring, or wait for the call to end. Hold music plays again until another call enters the queue.

As of CIC 4.0 SU4, you can also do any of the following:

- Skip a call that you're not interested in monitoring. Skipping a call puts you on hold until another call enters the queue.
- [Request an email that contains a recording of a monitored call.](#)
- [Record and save details for a call.](#)

**Note:** The time-out for all call operations defaults to five seconds. An optional server parameter is available to control time-outs for the various call operations. The **IWPCallMonitoringOperationTimeouts** parameter specifies time-outs in milliseconds. You can use a single value, such as 10000, to apply to all call operations, or specify pipe-delimited values for the operations in this order:

eSTART\_MONITORING|eSTOP\_MONITORING|eDISCONNECT|ePICKUP|ePLAY\_AUDIO|eCALL\_PHONE\_NUMBER

## Monitor Agents on Live Calls

Interaction Web Portal allows you to monitor agents on live calls, if you have the portal live monitor access control permission.

Supervisors typically monitor live calls to analyze agents' performance.

When a supervisor wants to monitor calls, Interaction Web Portal calls the supervisor on their phone, and then connects the call to the queue and agent.

A call can only be monitored if it is a new call or has been connected less than two seconds. This is because the greeting is an important part of monitoring the call.

### To monitor calls on a queue:

1. In the **Call Monitoring** portlet, or on the **Call Monitoring** page, select the name of the workgroup queue to monitor from the **Workgroup** list.
2. In the **Call me at** field, specify your extension or phone number.
3. Click **Start**.  
The Monitor Status changes to **Calling**, and Interaction Web Portal calls you back momentarily.
4. Pick up the call.  
The Monitor Status changes to **Waiting for call to enter workgroup**, and hold music plays until a call enters the queue.
5. Click **Disconnect** when you are ready to end call monitoring, or wait for the call to end. Hold music plays again until another call enters the queue.

As of CIC 4.0 SU4, you can also do any of the following:

- Skip a call that you're not interested in monitoring. Skipping a call puts you on hold until another call enters the queue.
- [Request an email that contains a recording of a monitored call.](#)
- [Record and save details for a call.](#)

**Note:** The time-out for all call operations defaults to five seconds. An optional server parameter is available to control time-outs for the various call operations. The **IWPCallMonitoringOperationTimeouts** parameter specifies time-outs in milliseconds. You can use a single value, such as 10000, to apply to all call operations, or specify pipe-delimited values for the operations in this order:

eSTART\_MONITORING|eSTOP\_MONITORING|eDISCONNECT|ePICKUP|ePLAY\_AUDIO|eCALL\_PHONE\_NUMBER

## Access to Call Monitoring

A user must have the [Monitoring](#) feature to see the **Call Monitoring** portlet in Interaction Web Portal.

The following table indicates which [user roles](#) are required to configure monitoring settings and monitored workgroups.

Task	Master Admin	Organization Admin	Delegated Admin	Enterprise	Agent
Assign monitored workgroups.	X				
Configure monitoring settings.	X	X			

## Request a Recording in an Email

When monitoring a call, you can request an email with a recording of the current call. You can also request recordings of all calls from that point forward.

1. While monitoring a call, click **Email Recording**.
2. The **Email Recording** dialog box appears.
3. Enter your email address.
4. Do one of the following:
  - Select **Current** to request a recording of the call that you're currently monitoring.
  - Select **All** to request recordings of all calls from that point forward.
5. Click **OK** to return to the **Call Monitoring** page. You should receive an email with the recording and any call details after the call completes.

## Save Call Details

While monitoring a call, you can enter notes or details in a text file, and then save that file on your local computer. When you request a recording in an email, the email includes the details.

# Manage Organizations and Users

In Interaction Web Portal, settings are configured at the organization level to maintain separation and privacy between organizations. Each organization can have their own unique and secure portal views.

Users are maintained within organizations and can be agents, supervisors, or administrators. Each user must be assigned to at least one organization and given a role that determines the data they can access and the tasks they can perform within each organization.

**See Also**

- [Add an Organization](#)
- [Add a User](#)
- [Access to Organizations](#)
- [Post Announcements for an Organization](#)

# Manage Organizations and Users

In Interaction Web Portal, settings are configured at the organization level to maintain separation and privacy between organizations. Each organization can have their own unique and secure portal views.

Users are maintained within organizations and can be agents, supervisors, or administrators. Each user must be assigned to at least one organization and given a role that determines the data they can access and the tasks they can perform within each organization.

**See Also**

- [Add an Organization](#)
- [Add a User](#)
- [Access to Organizations](#)
- [Post Announcements for an Organization](#)

# Access to Organizations

The presence of the **Portal Management** portlet in Interaction Web Portal depends on a user's role and not an assigned feature. This portlet only appears if the user is an administrator.

The following tables indicate which [user roles](#) are required to perform organization-related tasks.

## Create, Delete, and Save Basic Organization Information

Task	Master Admin	Organization Admin	Delegated Admin
Create and delete all organizations.	X		
Delete an organization to which he/she is assigned.	N/A	X	
Save an organization.	X	X	

## Organization Assignments

Task	Master Admin	Organization Admin	Delegated Admin
Assign a workgroup to an organization.	X		
Assign a CIC server to an organization.	X		
Assign Media Services path and URL.	X		

## Reporting Tasks

Task	Master Admin	Organization Admin	Delegated Admin
Assign reports to an organization.	X		
Configure Report settings.	X	X	

## User-Related Tasks

Task	Master Admin	Organization Admin	Delegated Admin
Create and delete users.	X	X	
Modify user information.	X	X	X
Add or delete user roles or features.	X	X <sup>1</sup>	X <sup>2</sup>

<sup>1</sup> An Administrator cannot add or remove the user role or features for a Master Administrator.

<sup>2</sup> A Delegated Administrator cannot add or remove the user role or features for a Master Administrator or Organization Administrator.

## Other Configuration Tasks

Task	Master Admin	Organization Admin	Delegated Admin
Configure service-level settings.	X	X	
Create, delete, or save system announcements.	X		
Create, delete, or save organization announcements.	X	X	
Modify security (password policy) settings.	X	X	
Create or delete a portal logo	X	X	

### See Also

[Access to Recordings](#)

[Access to Statistics](#)

[Access to Call Monitoring](#)

# Add an Organization

This procedure describes how to add and configure an organization.

---

## Accessing Organization Management

To access Portal Management, do one of the following:

- Click **Portal Management** in the Interaction Web Portal footer.
  - Click **Open** from the **Portal Management** portlet.
- 

## Add and Configure an Organization

To add a new organization and specify its settings:

1. Click **Add Organization**.

The **Add organization** dialog box appears.

2. In the **Organization Name** box, specify a unique name for the organization.
3. In the **Server** box, select the name of the organization's CIC server. Note that you can change the associated server later on the **Information** tab.
4. Choose **OK**.

The new organization name appears in the **Organizations** list and you are ready to start configuring its settings.

5. On the **Information** tab, enter the organization's address, phone, and email information.
6. Click **Change** if necessary, to change the organization's CIC server.
7. Under **Workgroup Assignment**, select one or more workgroups from the **Available Workgroups** list and click **Add >>** to assign those workgroups to the organization. Note that the other tabs are not available until you assign a workgroup.
8. Click one of the following links to continue the configuration:
  - [Configure Recordings Settings](#)
  - [Configure Statistics Settings](#)
  - [Configure Monitoring Settings](#)
  - [Configure Reporting Settings](#)
  - [Configure Service Indicator Settings](#)
  - [Configure Security Settings](#)
  - [Configure Announcements](#)
  - [Add a logo for the organization](#)
  - [Remove an organization's logo](#)
9. Click **Save** to save the organization.



## Delete an Organization

You can delete an organization that is no longer necessary in **Portal Management**. Note that when you delete an organization, all of the users assigned to that organization are also deleted.

---

### Accessing Organization Management

To access **Portal Management**, do one of the following:

- Click **Portal Management** in the Interaction Web Portal footer.
- Click **Open** from the **Portal Management** portlet.
- Select **Organizations**.

---

### Delete an Organization

To delete an organization:

1. In the list of organizations, select the one you want to delete.
2. Click **Delete** next to the organization name.
3. Confirm that you want to delete the organization.

## Add a User to an Organization

Each user must belong to an organization. Before the user can see or work with data for an organization, even the organization to which he/she belongs, the user must be assigned *membership* to the organization. Users can be members of multiple organizations. When a user is given membership in an organization, they have the rights to see data and perform certain tasks within that organization. What the user sees and can access depends on the user's role and the organization settings.

In Interaction Web Portal, there are three ways to add users:

- [Create new portal users who do not already have CIC accounts.](#)
- [Create portal users from existing CIC user accounts.](#)
- [Use a spreadsheet to import users.](#)

To add a user:

1. In **Portal Management**, make sure the appropriate organization is selected.
2. Select **Users** from the list on the left.
3. Click **Add User**.
4. The **Add user wizard step 1 - Choose user type** page appears.
5. Select one of the following option buttons, and then click **Next**:
  - **Create a new portal user that is not associated with an IC user account.** Use this option if the user doesn't already have an account in Customer Interaction Center.
  - **Create a new portal user from an existing IC user account.** Use this option if the user is already a Customer Interaction Center user. You can add multiple users at one time if you plan to give them all the same user role and features.
  - **Provision portal users.** Use this option if you want to do a bulk import of users and you are able to gather the necessary data in the provided spreadsheet template. With this option, users can have distinct user roles and features.
6. Continue to the appropriate section below.

---

### Create a New Portal User

If you choose to create a portal user without an existing CIC account, the **Account Information** wizard page appears. Continue with the following steps:

1. Specify a unique user ID in the **User Id** box. This is the ID the user will use to log on to the portal.
2. In the **Password** box, specify a password for the user, and then re-enter the password in the **Re-enter Password** box.

3. Select the **Active** check box if you are ready to make the user account active. If the check box is cleared, the user account is disabled.
  4. Select the **Must change password** check box to require the user to change his or her password upon first logging in.
  5. Click **Next**.
  6. Specify the user's name, phone numbers, and company information on the **User Information** page of the wizard, and then click **Next**.
  7. Specify the user's address on the **Address Information** page of the wizard, and then click **Next**.
  8. On the **Membership** information page of the wizard, select each organization to which the user should have access in the **Organizations** list, and then click **Add** next to the organization to add it to the user's **Memberships** list.
  9. Under each organization, specify the user's **role** in the organization (Enterprise, Delegated Administrator, or Organization Administrator).
- Warning:** You should only select the **Is Master Administrator** check box if the user should have access to all organizations and configuration settings.
10. Under **Features**, select the check box next to each feature the user should be able to access. Depending on the user's role, some features might not be available.
  11. Click **Create**. The user appears in the list for that organization.

---

## Create a Portal User from a CIC User Account

If you choose to create a portal user from an existing CIC account, the **Associate IC user** wizard page appears. Continue with the following steps:

1. Specify search criteria on the left side of the **Associate IC user** page, and then click **Search** to display a list of CIC users that match. Note that the asterisk (\*) wildcard character is allowed and the search is not case-sensitive.
2. Under **IC user search results**, find each CIC user in the list, and then specify the portal user ID for that user in the **User Id** box.
3. Click **Next** to display the **Membership information** page of the wizard.
4. On the **Membership** information page of the wizard, select each organization to which the user should have access in the **Organizations** list, and then click **Add** next to the organization to add it to the user's **Memberships** list.
5. Under each organization, specify the user's **role** in the organization (Agent, Enterprise, Delegated Administrator, or Organization Administrator).

**Warning:** Only select the **Is Master Administrator** check box if the user should have access to all organizations and configuration settings.

6. Under **Features**, select the check box next to each feature the user should be able to access. Note that if you are adding multiple web portal users at the same time, all of them will be given the role and features you specify. Depending on the user's role, some features might not be available.
7. Click **Create**. The user(s) appears in the list for that organization.

---

## Provision Portal Users

When you provision portal users, you download a spreadsheet template where you can enter data for multiple users and import them all at the same time.

**Note:** For Enterprise users, the role in the spreadsheet can either be Supervisor or Enterprise.

If you choose to create portal users by importing data from a spreadsheet template, continue with the following steps:

1. On the **Choose user type** page of the **Add user wizard**, click **Download user import template spreadsheet**.
  2. Add your user data to the spreadsheet, assigning the appropriate **user roles** and features to each user.
  3. Click **Next** to display the **User import** page of the wizard.
  4. On the **User import** page, click **Upload Import Data** and select the spreadsheet file that contains the user data. An "Uploading..." message appears while the data is uploading, and then the data appears on the **User import** page.
  5. Click **Start Import** to begin importing the uploaded data.
  6. Click **Close** once the import is complete.
-

## Portal Features

A Master Administrator or Organization Administrator can assign features to a user in Interaction Web Portal. A user must have the feature assigned before they can access the associated portlet.

The following table describes the available features and the type of license that is consumed when a feature is accessed. The features that are available to a user also depend on that user's [role](#).

Feature	Allows the User to...	License Usage
Recordings	Access the Recordings portlet and the Recording Viewer.	Agent
Monitoring	Monitor live phone calls in the Call Monitoring portlet.	Enterprise
Reports	Access historical reports in the Historical Reports portlet.	Enterprise
Statistics	Access the statistics dashboard and service-level indicator in the Interaction Statistics portlet.	Enterprise

### See Also

[User Roles](#)

[Access Control](#)

## User Roles

User roles determine which features a user can access and which tasks they can perform.

**Note:** A user can have different roles for different organizations. For example, a user can be an organization administrator for one organization and also a delegated administrator for another organization.

The following table describes each of the roles that are available to assign to a user and the features that are available for each role. Without a role, a user does not have rights to any features within Interaction Web Portal.

Role	Access to Recordings?	Access to Reports?	Access to Call Monitoring?	Access to Statistics?	Access to Organization Management?	Access to Portal Management?
Agent	X					
Enterprise	X	X	X	X		
Delegated Admin	X	X	X	X	X	
Organization Admin	X	X	X	X	X	
Master Admin	X	X	X	X	X	X

**Note:** Although all "administrator" users have access to Organization Management, there are different levels of access within that portlet. A user with the **Delegated Administrator** role can only modify a limited set of information attributes for an organization to which they are given access. A user with the **Organization Administrator** role can modify all attributes of an organization to which they have access. A user with the **Master Administrator** role has complete control to add, modify, or delete any organization.

### See Also

[Features](#)

# Set Recording Options for an Organization

An administrator can do any of the following to configure call recording options on the **Recordings** tab under **Portal Management**:

- [Enable or disable the Call Recordings portlet for the current organization.](#)
- [Specify the workgroup for which members of the selected organization can access recordings.](#)
- [Specify the path and URL for the Recording Server.](#)
- [Specify the available recording queries and indicate whether or not users can save recordings.](#)
- [Specify which columns of data should appear in the Recording Viewer.](#)
- [Specify which properties to display in the recording details.](#)

---

## Enabling or Disabling the Call Recordings Portlet

If an organization does not plan to use the Call Recordings portlet, you can hide it.

Do one of the following:

- To hide the Call Recordings portlet, clear the **Enabled** check box.
- To show the portlet, select the **Enabled** check box.

---

## Welcome Page Settings

Select the workgroup for which you want to display statistics in the Call Recordings portlet on the Interaction Web Portal Home page. The portlet displays the following statistics for that workgroup:

- Average score
- Average handle time (in seconds)
- Longest call (in seconds)

---

## Live Smooth Streaming

Live Smooth Streaming (IIS Media Services) is required to stream recordings. The path to the publishing point share and the publishing point URL are specified in the CIC server configuration in Portal Management, but you can override the default locations for a particular organization by setting the paths on the **Recordings** tab under **Portal Management**.

To set the Live Smooth Streaming locations for an organization:

1. In the **Publishing point share** field, specify the path to the where you want to store the recording files.
2. In the **Publishing point URL** field, specify the URL for the location from which recordings can be retrieved.

---

## Recording Query Settings

To modify the number of query results and select which data columns appear in the recording viewer when a query is run:

1. Clear the **Allow ad-hoc queries** check box if you want to hide the **Run ad-hoc search** button in the recording viewer. By default, ad-hoc queries are enabled.
2. Select the **Allow recordings to be saved** check box if you want the **Download this recording** button to appear in the recording viewer, or clear the check box to hide the button.
3. In the **Max recording search result size** box, specify the maximum number of recordings to display when a query is run. The default value is 250.
4. In the **Max previous days to allow for searches** box, specify the maximum number of days to include in the date range for ad-hoc recording queries. For example, you can specify that users can only display results for up to 90 days.
5. Under **Available Searches**, select the list of predefined queries that you want to be available to run, and then click **Add >>** to add them to the **Selected Searches** list. Note that the queries listed in the **Available Searches** box come from Interaction Recorder.
6. To remove any searches from the organization, select them in the **Selected Searches** list, and then click **<< Remove**.

---

## Recording Column Properties

You can configure which data columns are displayed in the recording viewer.

To add or remove data columns:

1. Select any columns you want to add in the **Available Properties** list, and then click **Add >>** to add them to the **Visible Properties** list. The columns in the **Visible Properties** list are the ones that appear in the recording viewer.
  2. Select any visible columns that you want to hide in the **Visible Properties** list, and then click **<< Remove** to hide them.
- 

## Recording Detail Properties

You can also configure the data fields that appear in the recording detail.

To add or remove data fields to the recording detail:

1. Select any data fields you want to add in the **Available Properties** list, and then click **Add >>** to add them to the **Visible Properties** list. The columns in the **Visible Properties** list are the ones that appear in the recording viewer.
  2. Select any visible columns that you want to hide in the **Visible Properties** list, and then click **<< Remove** to return them to the Available Properties list and hide them in the recording viewer.
- 

## Save Your Changes

Click **Save** to save your changes to click on an another tab to make more changes for the same organization.

If you click on a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.

## Set Recording Options for an Organization

An administrator can do any of the following to configure call recording options on the **Recordings** tab under **Portal Management**:

- [Enable or disable the Call Recordings portlet for the current organization.](#)
  - [Specify the workgroup for which members of the selected organization can access recordings.](#)
  - [Specify the path and URL for the Recording Server.](#)
  - [Specify the available recording queries and indicate whether or not users can save recordings.](#)
  - [Specify which columns of data should appear in the Recording Viewer.](#)
  - [Specify which properties to display in the recording details.](#)
- 

## Enabling or Disabling the Call Recordings Portlet

If an organization does not plan to use the Call Recordings portlet, you can hide it.

Do one of the following:

- To hide the Call Recordings portlet, clear the **Enabled** check box.
  - To show the portlet, select the **Enabled** check box.
- 

## Welcome Page Settings

Select the workgroup for which you want to display statistics in the Call Recordings portlet on the Interaction Web Portal Home page. The portlet displays the following statistics for that workgroup:

- Average score
  - Average handle time (in seconds)
  - Longest call (in seconds)
- 

## Live Smooth Streaming

Live Smooth Streaming (IIS Media Services) is required to stream recordings. The path to the publishing point share and the publishing point URL are specified in the CIC server configuration in Portal Management, but you can override the default locations for a particular organization by setting the paths on the **Recordings** tab under **Portal Management**.

To set the Live Smooth Streaming locations for an organization:

1. In the **Publishing point share** field, specify the path to the where you want to store the recording files.

2. In the **Publishing point URL** field, specify the URL for the location from which recordings can be retrieved.
- 

## Recording Query Settings

To modify the number of query results and select which data columns appear in the recording viewer when a query is run:

1. Clear the **Allow ad-hoc queries** check box if you want to hide the **Run ad-hoc search** button in the recording viewer. By default, ad-hoc queries are enabled.
  2. Select the **Allow recordings to be saved** check box if you want the **Download this recording** button to appear in the recording viewer, or clear the check box to hide the button.
  3. In the **Max recording search result size** box, specify the maximum number of recordings to display when a query is run. The default value is 250.
  4. In the **Max previous days to allow for searches** box, specify the maximum number of days to include in the date range for ad-hoc recording queries. For example, you can specify that users can only display results for up to 90 days.
  5. Under **Available Searches**, select the list of predefined queries that you want to be available to run, and then click **Add >>** to add them to the **Selected Searches** list. Note that the queries listed in the **Available Searches** box come from Interaction Recorder.
  6. To remove any searches from the organization, select them in the **Selected Searches** list, and then click **<< Remove**.
- 

## Recording Column Properties

You can configure which data columns are displayed in the recording viewer.

To add or remove data columns:

1. Select any columns you want to add in the **Available Properties** list, and then click **Add >>** to add them to the **Visible Properties** list. The columns in the **Visible Properties** list are the ones that appear in the recording viewer.
  2. Select any visible columns that you want to hide in the **Visible Properties** list, and then click **<< Remove** to hide them.
- 

## Recording Detail Properties

You can also configure the data fields that appear in the recording detail.

To add or remove data fields to the recording detail:

1. Select any data fields you want to add in the **Available Properties** list, and then click **Add >>** to add them to the **Visible Properties** list. The columns in the **Visible Properties** list are the ones that appear in the recording viewer.
  2. Select any visible columns that you want to hide in the **Visible Properties** list, and then click **<< Remove** to return them to the Available Properties list and hide them in the recording viewer.
- 

## Save Your Changes

Click **Save** to save your changes to click on another tab to make more changes for the same organization.

If you click on a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.

# Set Statistics Options for an Organization

An administrator can configure the following options for statistics on the **Statistics** tab under **Portal Management**.

---

## Enabling or Disabling the Statistics Portlet

If an organization does not plan to use the Statistics portlet, you can hide it.

Do one of the following:

- To hide the Statistics portlet, clear the **Enabled** check box.
- To show the portlet, select the **Enabled** check box.

---

## Default Rotation Interval for the Statistics Carousel

The Initial Rotation Interval determines the default interval at which the statistics carousel switches to the next statistic. This value is set for the organization, but a user can set their individual preference below the Statistics Panel to override this value. A user's individual preference is stored locally on his or her machine.

The available intervals are:

- Thirty Seconds
- One Minute
- Two Minutes
- Five Minutes
- Ten Minutes
- Fifteen Minutes
- Thirty Minutes
- One Hour
- Manual

**Note:** When set to Manual, the statistics do not rotate. The user must click the arrows or dot controls to display a new statistic.

---

## Statistics Panels

In the Statistics Panels section, you can specify the chart panels you want to appear in the statistics carousel for the users in the current organization. Each chart panel can contain one or more statistics.

You can also specify the following:

- The type of chart to display (label value pair, bar chart, column chart, or line chart) for a statistic.
- Any related reports to display for a statistic.
- Whether or not statistics can be viewed on mobile devices.

[Add a Chart Panel](#)

[Edit a Chart Panel](#)

[Delete a Chart Panel](#)

[Reorder the List of Chart Panels](#)

---

## Save Your Changes

Click **Save** to save your changes to click on an another tab to make more changes for the same organization.

If you click on a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.

## Set Call Monitoring Options

Call monitoring options affect the behavior of the Call Monitoring portlet. An administrator can configure call monitoring options from the Monitoring tab under **Portal Management**.

---

### Monitored Workgroups

Under **Monitored Workgroups**, select the workgroups to monitor from the **Assigned Workgroups** list and then click **Add >>** to move them to the **Monitored Workgroups** list.

Or, to remove one or more workgroups from the **Monitored Workgroups** list, select those workgroups and then click **<< Remove**.

---

### Monitored Classifications

By default, users can only monitor calls on local or intercom calls. Under **Monitored Classifications**, you can specify the classifications by which users in the organization can monitor calls.

Select each classification that you want to allow.

**Note:** If you want to monitor calls through a SIP line, you must select the **SIP Calls** check box.

---

### Monitor Settings

In the **Consecutive Calls to Monitor** box, specify the number of calls to monitor.

Under **Available Call Attributes**, select the attributes to use for the monitored calls.

---

### Save Your Changes

Click **Save** to save your changes, or click on an another tab to make more changes for the same organization.

If you click on a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.



## Set Reporting Options

An administrator can configure the following reporting options on the **Reportings** tab under **Portal Management**.

**Note:** Schedule Reports is required and you must create reports for them to appear in the **Available Reports** list.

---

### Enabling or Disabling the Reporting Portlet

If an organization does not plan to use the Reporting portlet, you can hide it.

Do one of the following:

- To hide the Reporting portlet, clear the **Enabled** check box.
- To show the portlet, select the **Enabled** check box.

---

### Report Selection

From the **Available Reports** list, select the reports that the organization can access, and then click **Add >>** to move them to the **Selected Reports** list.

Or, to remove access to one or more reports, select the reports from the **Selected Reports** list and then click **<< Remove**.

---

### Save Your Changes

Click **Save** to save your changes or click on an another tab to make more changes for the same organization.

If you click on a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.

## Set Service Indicator Default Settings

Interaction Web Portal uses the service-level indicator settings to help you monitor the percentage of interactions that are within specified service-level criteria.

A service-level indicator appears on the portal's Home page in the Statistics portlet. The settings you specify here determine the workgroup for which the indicator is displayed, the type of interactions included, the time interval, and accumulative histogram. Note that a user can override the default settings by changing the workgroup or interval from the Statistics portlet. For more information about overriding the default settings, see [Change the Service-Level Indicator Workgroup and Interval](#).

To set the default settings:

1. On the **Service Indicator** tab under **Portal Management**, do one of the following:
  - To enable the indicator, selected the **Enabled** check box.
  - To disable the indicator, clear the **Enabled** check box.
2. From the **Workgroup** list, select the workgroup for which the indicator should display service-level results. This setting changes the default workgroup. A user can select a different workgroup.

**Note:** Once a user opens the portal **Home** page, any changes to the default workgroup do not apply to that user.

3. From the **Interaction Type** list, select the appropriate interaction type to include in the service-level indicator. The available options are All objects, Call, Chat, Generic, and Callback.
4. From the **Service Level Interval** list, select the time period that you want the service-level indicator to represent. The service level intervals correspond to the service levels that are configured in Interaction Administrator on the **Configuration** page under **Workgroup Configuration**.

**Note:** Once a user opens the portal **Home** page, any changes to the default service level interval do not apply to that user.

5. From the **Accumulative histogram** list, select an interval. The accumulative histogram summarizes interactions that are serviced in that interval and displays the results in the workgroup's service indicator in the Interaction Statistics portlet. The available intervals depend on the selected interaction type. For example, if you select the Call interaction type and the 0-120s interval under **Accumulative histogram**, then the service indicator on the **Home** page displays a summary of the call interactions that were serviced within 120 seconds.
6. Click **Save** to save your changes to the organization.

## Set Security Options

An administrator can configure an organization's password policy on the **Security** tab under **Portal Management**.

### Set Password Options and Enable or Disable Password Complexity

You can configure the standard password options, or enable the use of password complexity. Password complexity enforces minimum security thresholds for passwords.

#### Password Options

You can configure these standard password options for an organization, regardless of whether or not password complexity is enabled:

Option	Default Setting	Description
Maximum password age	180 days	The number of days after which a password expires. Must be 0-180. 0=never expires.
Minimum password length	6	The number of characters required in a password.
Password history count	5	Number of previous passwords kept in history. 0 disables the history count.
Account lockout threshold count	4	Number of logon attempts to allow before locking out an account.
Account lockout duration	15 minutes	Period of time after a lockout before a user can try logging on again.
Reset account lockout counter	5 minutes	Must be greater than 0.

#### Password Complexity

To enable additional password complexity, select the **Additional password complexity enabled** check box. When you enable this option, Interaction Web Portal enforces these rules:

- A password does not contain the account name of the user.
- A password must contain 6-128 characters.
- A password must contain characters from three of the following categories:
  - Latin uppercase letters (A through Z)
  - Latin lowercase letters (a through z)
  - Base 10 digits (0 through 9)
  - Non-alphanumeric characters such as exclamation point (!), dollar sign (\$), number sign (#), and percent (%).

To enable the use of the password complexity for the selected organization, select the **Additional password complexity enabled** check box. To disable the use of password complexity, clear this check box.

#### Save Your Changes

Click **Save** to save your changes or click on another tab to make more changes for the same organization.

If you click on a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.

## Post Announcements

Interaction Web Portal allows announcements at both the system level and the organization level. System-level announcements are displayed for all portal users. Organization-level announcements are only displayed for users from that organization.

---

### Post an announcement for an organization

An administrator can post an organization's announcement on the **Announcements** tab under **Portal Management**.

New organization announcements are indicated on the **Home** page of the portal by a **Messages** heading bar and the number of new messages. Once an announcement is viewed, the **Messages** heading bar changes colors and the number is no longer displayed.

To post an organization announcement:

1. On the Announcements tab in Portal Management, click **Add Announcement**.
  2. In the Title box, specify a descriptive name for the message.
  3. In the Message box, type the message contents.
  4. Select the **Begin** and **End** dates and times for the message to appear.
  5. Click **Save** to save your changes or click another tab to make more changes for the same organization. If you click a different organization before you save your changes to the current organization, the portal notifies you that the organization has changed and asks you to confirm the changes before continuing to the newly selected organization.
- 

### Post a System Announcement

You can also manage system announcements in Portal Management, but they are independent of organizations.

To post a system announcement:

1. In Portal Management, select **System Announcements** from the drop-down list.
2. Click **Add System Announcement**.
3. In the **Add system announcement** dialog box, type a name for the announcement, and then click **OK**.  
The **System Announcement** page appears in Portal Management and the announcement name appears in the **Title** box.
4. In the **Message** box, type the announcement content.
5. Select the **Begin** and **End** dates and times for the message to appear.
6. Click **Save**.

# Configure CIC Server Options

CIC Server Configuration is where an administrator can configure the LDAP credentials, CIC server credentials, and Live Smooth Streaming (IIS Media Services) default settings. These settings are normally configured by an administrator the first time Interaction Web Portal is used. For more information, refer to the [Interaction Web Portal and Interaction Marquee Installation and Configuration Guide](#).

---

## Accessing CIC Server Configuration

To access CIC Server Configuration, click **Portal Management** in the Interaction Web Portal footer, and then select **IC Server Configuration** from the drop-down list.

---

## LDAP Credentials

You must provide an authorized user name and password to log in to the LDAP server before you can update the CIC server configuration settings.

To specify the login credentials for the LDAP server:

1. In the **User** and Password boxes, specify the authorized LDAP login credentials.
  2. Click **Logon**.
- 

## CIC Servers

After successfully logging on, you need to specify the names and credentials for the CIC servers.

To specify CIC server names and credentials, do one of the following:

- To add a new CIC server name, click **<new>** in the **IC server names** list.
  - To modify the credentials for an existing server, select the server from the **IC server names** list.
  - To delete a server, select the server name from the list, and then click Delete.
- 

## Live Smooth Streaming (IIS Media Services) Settings

Live Smooth Streaming is necessary for streaming of call recordings. You must specify the default publishing point share and URL. Note that these settings can be overridden by an organization's Live Smooth Streaming settings.

To set the **Live Smooth Streaming** Settings:

1. In the **Publishing point share** field, specify the path to the the location where the files are to be stored.
2. In the **Publishing point URL** field, specify the URL for the location from which the recording files are to be retrieved.
3. Click **Finish**.

## Add a Logo to the Portal

A master administrator or an organization administrator can add a logo to the portal's **Home** page for each organization by uploading a logo image on the **Theme** tab under **Portal Management**.

**Requirements:** The logo must be a Portable Network Graphics (.png) file, and must be 296 pixels wide and 24 pixels high.

---

### To add a logo:

1. Under **Portal Management**, select the organization.
2. On the **Theme** tab, click **Upload logo file**.
3. Browse to the appropriate .png file, and then click **Open**.

The logo appears on the **Theme** tab for you to preview.

4. Click **Save**.
5. Click **Home**. You should see the new logo at the top of the portal **Home** page.

### Related Topics

[Delete a Logo](#)

---

## Delete a Logo

To delete a logo that appears on the portal's **Home** page:

1. In **Portal Management**, select the organization.
2. On the **Theme** tab, click **Delete logo file**.

The **Confirm** dialog box appears.

3. Click **OK** to confirm the deletion.
4. Click **Home** to verify that the logo is gone.

### Related Topics

[Add a Logo](#)

# Agent Portal

The Agent Portal appears when an agent logs on to Interaction Web Portal. The Agent Portal displays statistics, the agent's current status and schedule, quality and satisfaction results, and feedback results for the agent.

**Note:** The Agent Portal is available in Customer Interaction Center 4.0 Service Update 3 ES, and later versions of CIC. If you are using the CIC 4.0 SU 3 release, you won't see the Agent Portal until you apply the ES.

When in an *available* status, agents cannot use all of the features of the portal. For example, an agent can view statistics and feedback results, but cannot request time off. Because agents are constantly busy working with interactions, the full features of the agent portal are only available when the agent is not in an *available* or *after call work* status.

[Agent Portal Launch Page](#)

[Agent Portal Request Time Off](#)

[Agent Portal Feedback Results](#)

To view the agent portal, log into Interaction Web Portal as an agent.

# Agent Portal

The Agent Portal appears when an agent logs on to Interaction Web Portal. The Agent Portal displays statistics, the agent's current status and schedule, quality and satisfaction results, and feedback results for the agent.

**Note:** The Agent Portal is available in Customer Interaction Center 4.0 Service Update 3 ES, and later versions of CIC. If you are using the CIC 4.0 SU 3 release, you won't see the Agent Portal until you apply the ES.

When in an *available* status, agents cannot use all of the features of the portal. For example, an agent can view statistics and feedback results, but cannot request time off. Because agents are constantly busy working with interactions, the full features of the agent portal are only available when the agent is not in an *available* or *after call work* status.

[Agent Portal Launch Page](#)

[Agent Portal Request Time Off](#)

[Agent Portal Feedback Results](#)

To view the agent portal, log into Interaction Web Portal as an agent.

# Access to Features in the Agent Portal

Agents must have certain licenses to access the features in the portal. If an agent doesn't have the appropriate license, the related feature does not appear in the portal.

The following features always appear in the portal and don't require a license:

- Agent Information portlet
- Statistics portlet
- Wrap-up Codes portlet (if the agent has wrap-up codes for the specified period)
- Recordings portlet (as long as at least one tab is enabled)
- Trends portlet (as long as at least one series is enabled)

The following table describes the licenses that are required for each feature.

Feature	Required Licenses	Notes
Quality Average portlet	I3_ACCESS_RECORDER_QUALITYMONITORING	
Satisfaction Average portlet	I3_ACCESS_FEEDBACK	
Work Schedule portlet	I3_ACCESS_OPTIMIZER I3_OPTIMIZER_SCHEDULABLE	
Recordings portlet		At least one tab is required.
Recent tab		At least one column is required.
Pending tab	I3_ACCESS_RECORDER_QUALITYMONITORING	
Satisfaction columns	I3_ACCESS_FEEDBACK	
Quality columns	I3_ACCESS_RECORDER_QUALITYMONITORING	
Open button	I3_ACCESS_RECORDER_CLIENT, I3_ACCESS_RECORDER_QUALITYMONITORING, or I3_ACCESS_FEEDBACK	
Search All Recordings link	I3_ACCESS_RECORDER_CLIENT, I3_ACCESS_RECORDER_QUALITYMONITORING, or I3_ACCESS_FEEDBACK	
Trends portlet		At least one series is required.
Quality series	I3_ACCESS_RECORDER_QUALITYMONITORING	
Satisfaction series	I3_ACCESS_FEEDBACK	
Recording Viewer Search Options		
All recordings	I3_ACCESS_RECORDER_CLIENT	
Scored recordings only	I3_ACCESS_RECORDER_QUALITYMONITORING	
Surveyed recordings only	I3_ACCESS_FEEDBACK	
Scorecard recordings and surveyed interactions	I3_ACCESS_FEEDBACK	
Play recording	I3_ACCESS_RECORDER_CLIENT	



## Agent Portal Home Page

**Note:** The Agent Portal is available in the Customer Interaction Center 4.0 Service Update 3 ES, which follows the 4.0 SU 3 release, and also in later versions of CIC. If you are using the CIC 4.0 SU 3 release, you won't see the Agent Portal until you apply the ES.

The Agent Portal **Home** page displays the following, if the user has the appropriate licenses:

- Agent status
- Quality Average
- Satisfaction Average
- Statistics
- Work Schedule
- Quality and Satisfaction Trends
- Quality and Satisfaction Results
- Wrap-up Code Distribution

For more information about the required licenses, see [Access to Features in the Agent Portal](#).

On the Home page, the Quality Average, Satisfaction Average, and Quality and Satisfaction Results percentages are color coded.

Percentage Range	Associated Color
0 to 69.99%	Red
70 to 79.99%	Yellow
80 to 100%	Green

### Related Topics

[Introduction to the Agent Portal](#)

[Agent Portal - Statistics](#)

[Agent Portal - Quality and Satisfaction Trends](#)

[Agent Portal - Wrap-up Codes](#)

[Agent Portal - Feedback Results](#)

[Agent Portal - Work Schedule](#)

## Agent Portal -- Statistics

By default, the following statistics appear on the Agent Portal home page:

Statistic	Formula
Entered ACD calls	Number of ACD calls during the specified period
ACD average handle time	(ACD talk time + After call work time)/ACD Calls
ACD logged in time	Amount of time agent has been logged in during the specified period
ACD hold time %	ACD hold time /ACD interaction time

Each of the statistics is calculated for the currently logged on agent and for the specified time period.

An agent can select up to four statistics to display in the Statistics portlet of the Agent Portal.

Configure Statistics ×

- |                                     |                            |
|-------------------------------------|----------------------------|
| <input checked="" type="checkbox"/> | Entered ACD calls          |
| <input type="checkbox"/>            | Answered calls             |
| <input type="checkbox"/>            | Answered ACD calls         |
| <input type="checkbox"/>            | Abandoned ACD calls        |
| <input type="checkbox"/>            | Flow-out ACD calls         |
| <input type="checkbox"/>            | Transferred ACD calls      |
| <input type="checkbox"/>            | Internal-only ACD calls    |
| <input type="checkbox"/>            | External to internal calls |
| <input type="checkbox"/>            | Internal to external calls |
| <input type="checkbox"/>            | ACD talk time              |
| <input type="checkbox"/>            | After call work            |
| <input type="checkbox"/>            | ACD hold time              |
| <input type="checkbox"/>            | Logged in time             |
| <input type="checkbox"/>            | Logged in time             |
| <input type="checkbox"/>            | Available time             |
| <input checked="" type="checkbox"/> | ACD logged in time         |
| <input type="checkbox"/>            | ACD handle time            |
| <input checked="" type="checkbox"/> | ACD average handle time    |
| <input type="checkbox"/>            | ACD hold time (%)          |

Save

Cancel

## Agent Portal -- Quality and Satisfaction Trends

An agent with the appropriate license can view a graph that indicates the quality and satisfaction trends for both the agent and the workgroup. The trends are based on the quality and satisfaction results and are reported for the time period that the agent selects in the portal.

The graph contains a line for each of the following:

- Agent Quality Average
- Workgroup Quality Average
- Agent Satisfaction Average
- Workgroup Satisfaction Average

To view the number of interactions included in an average at a specific time, position the mouse pointer over the corresponding nodule on the trend line.

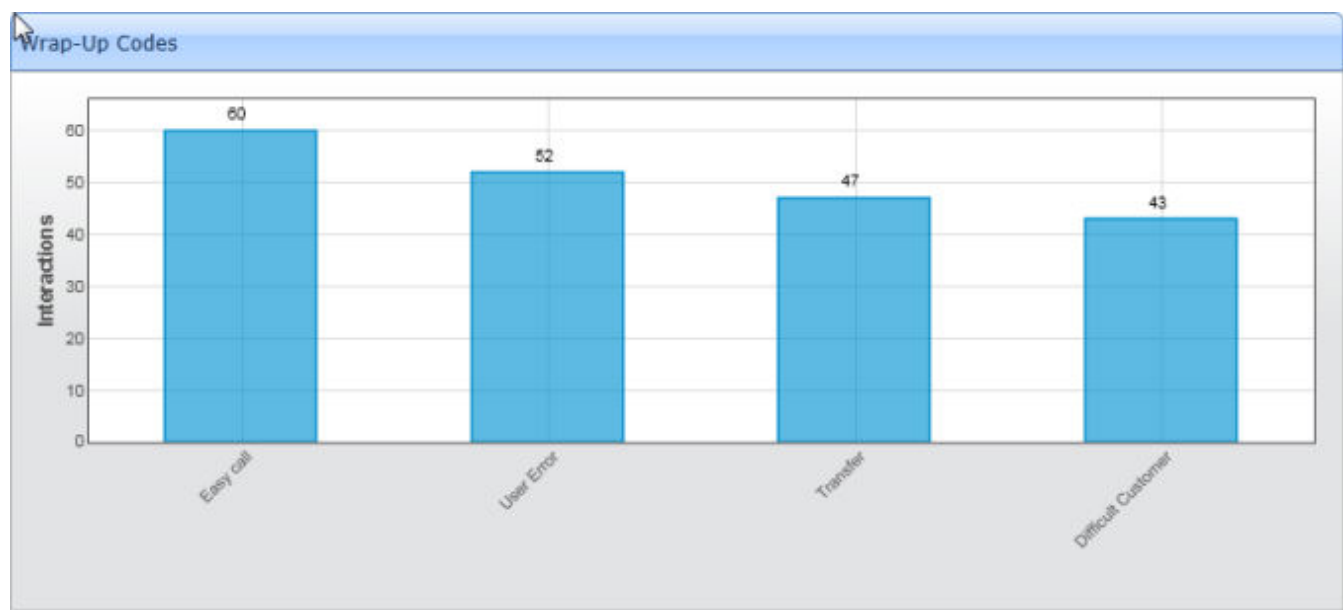
For more information about required licenses, see [Access to Features in the Agent Portal](#).

## Agent Portal -- Wrap-up Codes

Wrap-up codes indicate the nature of an interaction. For example, a billing problem, a new order, or a service request. Wrap-up codes can be anything an administrator creates for your workgroup.

Agents can enter wrap-up codes during or after an interaction, depending on whether wrap-up codes are configured and activated. For more information, see Help in your CIC client.

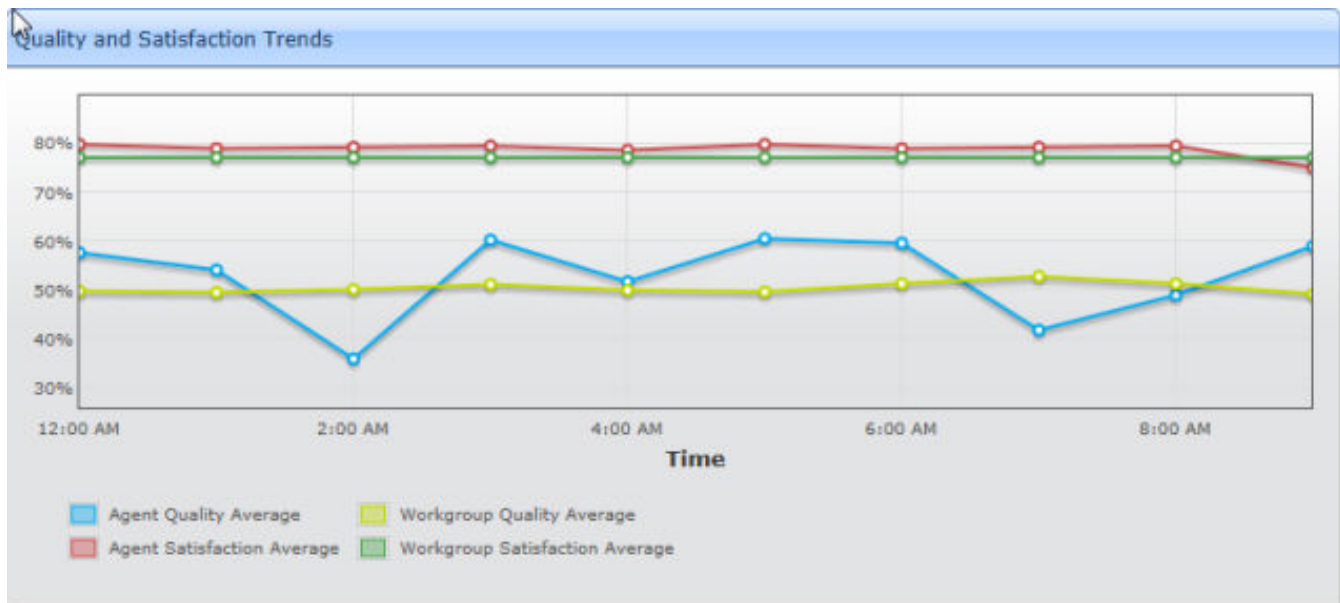
In the Agent Portal, the Wrap-up Codes portlet displays the distribution of interactions by wrap-up code. The distribution includes interactions for the specified workgroup and time period.



## Agent Portal Feedback Results

Interaction Web Portal uses Interaction Feedback to report [quality and satisfaction trends and results](#).

For example:



Quality and Satisfaction Results

Recent Signature Required Search...

Quality	Satisfaction	Date	Duration	
58.99%	75.00%	02/08/2013 9:01 AM	0:01:21	
39.51%	91.67%	02/08/2013 8:57 AM	0:01:22	
18.52%	66.67%	02/08/2013 8:52 AM	0:01:22	
72.84%	83.33%	02/08/2013 8:48 AM	0:01:22	

---

## Agent Portal -- Overview of Work Schedule

The features in the Work Schedule portlet allow you to:

- See a calendar for the current month. Scroll through the calendars for previous and following months, and then click **Today** to return to the current month.
  - [Zoom to the schedule](#) to display details for the schedule entries.
  - [Request time off work](#).
- 

---

## Agent Portal -- Overview of Work Schedule

The features in the Work Schedule portlet allow you to:

- See a calendar for the current month. Scroll through the calendars for previous and following months, and then click **Today** to return to the current month.
  - [Zoom to the schedule](#) to display details for the schedule entries.
  - [Request time off work](#).
- 

---

## Agent Portal -- Request Time Off

You can request time off in the **Work Schedule** portlet.

### To request time off:

1. In the **Work Schedule** portlet, click **Request Time Off**.
2. Under **Time Off Request**, specify the details of the request, and then click **Create**.  
The request appears under **Recent Time Off Requests** with a Submitted status. You can view the current status of your requests under the list of recent requests

### To edit a time-off request:

1. Under **Recent Time Off Requests**, click the request that you want to edit.  
The request details appear under **Time Off Request**.
2. Update the request details, and then click **Update**.

### To cancel a submitted request:

1. Under **Recent Time Off Requests**, click the request that you want to cancel.
2. Click **Cancel**.
3. Click **OK** to confirm that you want to cancel the request.

---

## Agent Portal -- Zoom to Schedule

The Zoom to Schedule feature in the **Work Schedule** portlet allows you to display a full-size version of the agent schedule. The full-size version of the schedule displays meetings and schedule entries that are not visible from the calendar view that appears in the portlet.

Just as you can in the calendar view, you can use the **Next** and **Previous** arrow buttons to scroll through the schedule one month at a time in the full-size view.

To return to the portal home page, click **Return to Portal**.

## Change log

Date	Changes
28-February-2019	Created this change log.
19-March-2019	Updated description of Available Agents statistic.
10-June-2019	Updated Available Statistics with these new statistics: Customer Keyword Spotted, Agent Keyword Spotted, Total Agent Positive Score, Total Agent Negative Score, Total Customer Positive Score, Total Customer Negative Score, Highest Active Agent Positive Score, Highest Active Customer Positive Score.
11-June-2019	Updated note about Dialer statistics in Available Statistics topic.
22-July-2019	Add link to <i>Interaction Web Portal and Interaction Marquee Installation and Configuration Guide</i> in Requirements topic and Configure CIC Server Options topic.
13-November-2019	Updated "Search Recordings" topic to include that the Service admin account is used to check the security policies when a user runs a search.