NICE®
Intent. Insight. Impact.

NICE PUBLIC SAFETY SOLUTIONS

NICE INFORM GETTING STARTED USER GUIDE

Release 9.1

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NICE · Inform

Important Notice

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1   Welcome

Welcome to NICE Inform™ application suite.

NICE Inform™ is an application suite for Public Safety organizations. The NICE Inform application suite provides:

- The ability to select particular recordings for playback and analysis.

- Logging and storage of the organization's recordings and other related data.

- Analysis and distribution of recordings made by the organization, in particular:

  – Locating recordings from various media types to reconstruct a particular incident.

  – Managing the storage of reconstructed incidents and their distribution either internally or outside the organization.

  – Monitoring of live communications and replaying of recent calls.

Each major topic area is listed below. For detailed information on each topic, refer to relevant section in the Online Help or supplied User Guide.

- **Getting started** - details how to log into NICE Inform, change your password and provides licensing information.

- **Monitor** - application that provides the ability to monitor near real time audio and replay recent calls from channels on an audio logger.

- **Reconstruction** - application that provides the ability to search and playback recordings in graphical (Timeline display) and tabular format.

- **Organizer** - application that provides the ability to create and manage incidents and distribute them (i.e. in Media Player format).

- **Reporter** - application that provides the ability to create reports on data from data sources supported by NICE Inform, and from Evaluations.

- **Evaluator** - application that provides the ability to evaluate call takers within a call center environment.

- **Archive** - application that enables administrators to archive a snapshot of recordings. NICE Inform Reconstruction and NICE Inform Organizer is then used to review the archive.

NOTE: The NICE Inform Archive application is optional and **ONLY** supplied on request.

- **Audit** - application that enables administrators to view and manage the audit events raised within a NICE Inform system.

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

- **System Administration** - application that enables administrators to add and configure data sources, resources, NICE Inform Servers, etc.

- **Template Designer** - application that enables administrators to create forms and templates that other applications within NICE Inform require.

- **Glossary** - details, all icons, shortcut keys and audit events in the NICE Inform system.

1.1   Conventions

Information with special meaning

Certain typographical conventions are used to help denote information of special note or importance.

NOTE:	A **NOTE** calls attention to additional information or references related to an operation, procedure, practice, and so on.

TIP:	A **TIP** calls attention to topics or tutorials related to an operation, procedure, practice, and so on.

Hyperlinks

There are many hyperlinks to aid in your searching / experience when using the help. These links may point to other relevant help topics, display textual pop-ups or provide you with a screen image to illustrate the help that you are currently reading.

Window features

Within a 'How to ...' type topic, when you see text in bold face, it is referring directly to some literal text in the program window. For example, "When the changes are completed, click the **Next** button" means there will be a button on the screen labeled '**Next**'.

Shortcut keys

Throughout NICE Inform there are a number of places where shortcut keys (or accelerator keys) can be used to invoke a particular function. For example, in NICE Inform Reconstruction, to playback a selected recording, press the Shift + Space keys.

The help details these shortcut keys and where they occur within NICE Inform.

1.2   Notices & customer support

Refer to your supporting documentation for customer support information.

Copyright

This product contains the following code library:

- log4net
- Windows Media Video 9 VCM Codec
- Chilkasoft Chilkat.NET
- Netopia

Further details can be found on your Software Release Note.

2   Getting Started

▶ To start NICE Inform:

1. Do one of the following:

   – Open your Microsoft Internet Explorer/Edge browser.

   – Run the installed NICE Inform client, if it has been installed on the workstation.

NOTE:	To avoid re-entering the NICE Inform URL every time you run the application suite, it is recommended that you add the NICE Inform website to your Internet 'favorites' the first time you run the application.

2. In the **Address** text box, enter the web address of NICE Inform, or select the application from your list of favorites.

NOTE:	If you are using HTTPS on your NICE Inform server, you **MUST** enter the NICE Inform URL beginning with **https://** instead of **http://**.
	For information regarding HTTPS, refer to the appendix entitled *NICE Inform Secure Web Server Install* in the *NICE Inform Installation Guide*.
	When connecting to the NICE Inform server from a NICE Inform client over IPV6 or HTTPS, you **MUST** enter the hostname and **NOT** the IP address.

3. Click **GO**. You are presented with the login screen as shown here.

Figure 2-1: Logging in screen
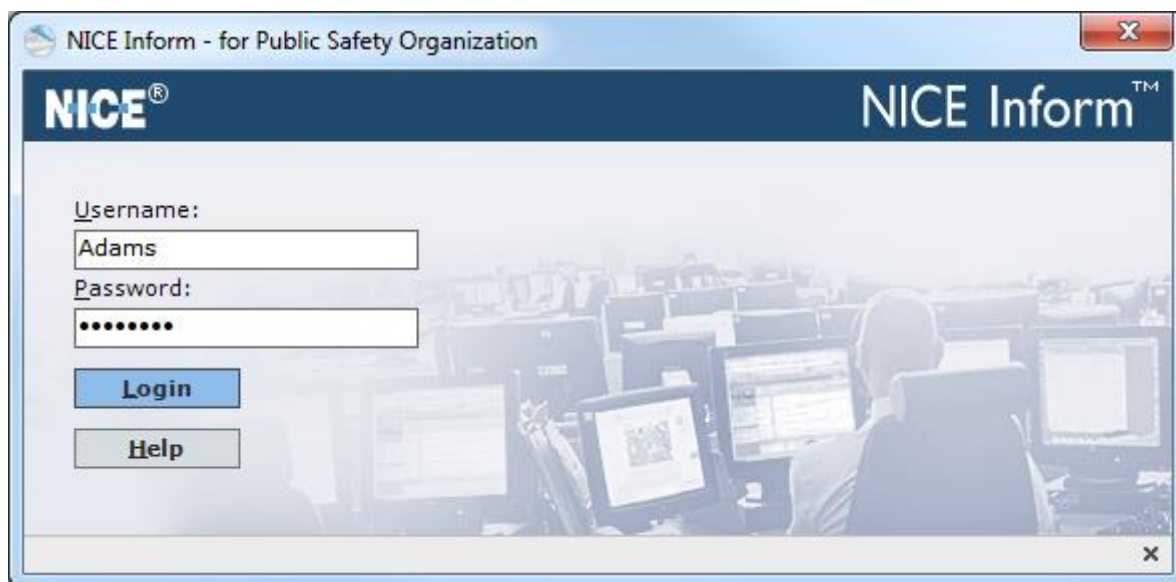
4. Enter your username and password in the text boxes provided.

NOTE:	You can change your password at any time if required (refer to Changing your password (see page 5)).
	A NICE Inform Administrator can set your account so that you **MUST** change your password at next login by editing your user details.
	You can close the login screen by either clicking the **Close** ✖ button or by clicking the red cross ▭X▭ button in the top right corner of the screen.

5. Click the **Login** button. The NICE Inform application starts.

3   Changing your password

▶ To change your password:

1.   Click the **Settings** ▤ button at the top right hand corner of the window.

2.   In the drop down menu, click the **Change Password** option. The **Change Password** dialog is presented.

3.   Enter the following details:

   –   Your old password.

   –   Your new password.

   –   Your new password confirmed.

NOTE: A NICE Inform Administrator can set your account so that you **MUST** change your password at next login (refer to *Editing user details* in *NICE Inform User Administration*).

             A NICE Inform Administrator can also set all users and users with Administration access rights, to also change their passwords (refer to *Setting password details* in *NICE Inform User Administration*).

3.1.1   Changing your second password

If you login to NICE Inform with a second password, when changing your password you are presented with a different **Change Password** dialog with the following sections:

First Password

▶ To change your first password:

1.   Check the **Set this password** box to enable this section.

2.   Enter the following details:

   –   Your old second password.

   –   Your new second password.

   –   Your new second password confirmed.

Second Password

▶ To change your second password:

1.   Check the **Set this password** box to enable this section.

2.   Enter the following details for your second password:

   –   Your old second password.

   –   Your new second password.

   –   Your new second password confirmed.

NOTE:	Copying and pasting the text from the previous text box does **NOT** work.
	Your password **MUST** conform to the password rules (see page 6).

3.1.2   Password rules

NOTE:	This section mentions the **Passwords** page. For more information, refer to *Setting password details* in *User Administration.*

The following password rules always apply:

- Must be at least the set number of characters as configured by the **Password Checking** feature in the **Passwords** page.

- Must be equal to or longer than the minimum length.

- Must not contain any of the user's first name, last name or username.

- Must not be the same as the second password (either the standard or second, if enabled).

- Must not appear in the Password History (if password history is enabled), (both standard and second password histories).

- Must not appear in the Forbidden Password list.

- Must not contain any blanks.

If the **Strict password checking** feature is enabled in the **Passwords** page, the following additional rules apply:

- Must have at least one capital letter.

- Must have at least one lower case letter.

- Must have at least one number character.

- Must have at least one special character.

- Must have no identical consecutive characters.

For users that access NICE Inform User Administration and/or NICE Inform System Administration, the following rule applies:

- Must be at least the set number of characters for all users as configured by the **Administrator Password Checking** feature in the **Passwords** page.

4   Licensing information

This section provides everything you need to know about licensing information when using NICE Inform.

Your license file is imported using the Licensing page within NICE Inform System Administration (refer to *Importing licensing details* in *NICE Inform System Administration*). Once imported you can check the details of your newly imported licensing details.

NOTE: It is recommended that you regularly check your license details to ensure that you are not about to exceed any license parameters.

Licensing is divided into the following sections:

- Concurrent user licensing (see page 7)

- Channel licensing (see page 8)

- Grace period (see page 8)

- Licensing warning messages (see page 9)

4.1.1   Concurrent user licensing

Concurrent licensing is based on the number of simultaneous users accessing a NICE Inform application. For example, in a ten user concurrent user license for NICE Inform Reconstruction, after ten users are logged in, the eleventh user is prohibited. When any one of the first ten logs out, the next user can log in.

An example of a concurrent license feature in the License Details table reads '**Reconstruction application concurrent licenses**'

NOTE: Grace period is **NOT** applicable for concurrent user licensing.

4.1.1.1   Exceeding a concurrent user license

Should you exceed a concurrent user license for a NICE Inform application the application loads with no content and a message informing you that there are no licenses available.

You have to wait for a license to become available. Once a license has become available, click the **Retry** button.

NOTE: When trying to log into NICE Inform Verify when there are no available licenses you are presented with a license message informing you that the license limit for Verify has been reached. You have to wait for a license to become available before you can log back in.

4.1.1.2   Add & Smart Transfer to Organizer

When trying to run the Add to Organizer Wizard (refer to *Adding Reconstruction Content to Organizer* in *NICE Inform Reconstruction*) or the Smart Transfer to Organizer Wizard (refer to *Smart Transfer to Organizer* in *NICE Inform Reconstruction*) within NICE Inform Reconstruction, both wizards automatically start the NICE Inform Organizer application. If there are not any available licenses for Organizer, as soon as you try running either wizard you are presented with a message informing you that the wizard cannot start as there are no

Organizer licenses available. As soon as a license becomes available then either wizard operates as usual.

4.1.2   Workstation licensing

NOTE: Workstation licensing is **ONLY** used to control codec royalties.

- ■ This is an alternative to licensing the number of users. Refer to the Licenses page where you import your licensing details (refer to *Importing licensing details* in *NICE Inform System Administration*) to see whether the number of workstations is licensed.

- ■ Each time a user logs on from a workstation unknown to the system a workstation license is allocated. This also happens when a workstation is added in the User Administration application (refer to *Adding a workstation* in *NICE Inform System Administration*).

- ■ Licensing is assigned per fixed workstation and therefore is **NOT** floating.

- ■ System and User Administration applications are **NOT** license limited as long as you have Administration privileges.

4.1.3   Channel licensing

Every time when adding/importing resources into the system a license is allocated per channel added. For example, if 24 channels are imported then 24 licenses are used.

4.1.4   Grace period

When one or more of the license parameters has been exceeded, the license remains valid but enters a grace period. This permits you to use those exceeded licenses for the duration of the grace period.

When the grace period ends the license reverts back to its original parameters.

There are two ways to reset the grace period:

- ■ Remove users from the system until the license remaining goes back to 0 or a positive number. To view remaining licenses, you need to view the **Licenses** page at the **Organization** level within **System Administration** (refer to *Importing licensing details* in *NICE Inform System Administration*).

    For help removing users from the system using **User Administration**, refer to *Deleting a user* in *NICE Inform User Administration*.

NOTE: Grace period is **NOT** applicable for concurrent user licensing.

- ■ Importing a new license file provided to you by NICE.

    For help importing a new license using **System Administration**, refer to *Importing licensing details* in *NICE Inform System Administration*.

4.1.5   Licensing warning messages

When logging in to NICE Inform you may be presented with a licensing message informing you that either the license has expired, is invalid or has been exceeded.

The message you may be presented can vary depending if you are an administrator or a user of NICE Inform:

Administrators

- When the NICE Inform license has expired a message is presented informing you that the license has expired and that you should review the license information in NICE Inform System Administration. Click **OK** to this message and NICE Inform loads with **User and System Administration** applications enabled. All other applications are disabled.

- If the license is due to expire within the next 30 days a warning message is presented informing you that you have entered the grace period. Click **OK** to this message and NICE Inform loads. Once the license has expired then you may be presented with a grace period warning message dialog).

- If the license is invalid a message is presented informing you that you have automatically entered the grace period. Click **OK** to this message and NICE Inform loads normally.

- If the license is invalid and the grace period expired a warning message is presented informing you that the license is invalid. Click **OK** to this message and NICE Inform loads with **User** and **System Administration** applications enabled. All other applications are disabled.

- If the license has been exceeded a warning message is presented informing you that you have automatically entered the grace period. Click **OK** to this message and NICE Inform loads normally.

- If you have exceeded one or more channel based resources (e.g. video or audio channels), a warning message is presented informing you that you have entered the grace period. Click **OK** to this message and NICE Inform loads. Once the license has expired then you may be presented with a grace period warning message dialog).

Users

- If the license has expired a warning message is presented informing you that the license is not valid. Please contact your NICE Inform administrator.

- If the license is invalid a warning message is presented informing you that the license is not valid. You cannot login to NICE Inform. Please contact your NICE Inform administrator.

- If the license has been exceeded and is in the grace period, a warning message is presented informing you NICE Inform will continue to function as normal until the grace period has expired. Click **OK** to this message and NICE Inform loads normally.

- If you either have no application privileges a warning message is presented informing you that your account has no application privileges assigned. Either you have no privileges assigned to you or your license allocation has been revoked. Either way, please contact your NICE Inform administrator.

If you are trying to login to NICE Inform with a workstation that is not known to the system, a warning message is presented informing you that you cannot access NICE Inform using this workstation. You see this message if the **Automatically learn workstations** check box is unchecked in the **Workstations** page (refer to *Setting workstation permissions* in *NICE Inform User Administration*). Please contact your NICE Inform administrator.

5 NICE Inform applications

Running along the top of NICE Inform™ application suite is the Application selector bar.

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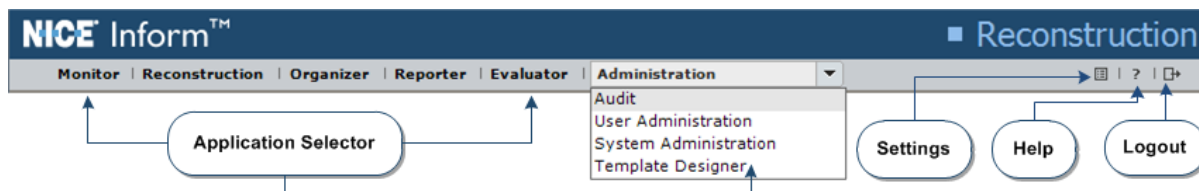

Figure 5-1: NICE Inform selector bar

Table 5-1: NICE Inform applications

| Feature number	Description
1	**Application selector** - enables access to all the available NICE Inform applications you have access to.
2	**Settings** button - enables you to change your user password (refer to Changing your password (see page 5)).
3	**Help** button - enables access to the Online Help to assist you when using NICE Inform, access to the NICE Inform diagnostic folder for workstation logs and provides details as to the NICE Inform version (via the **About** menu).
4	**Logout** button - enables access for you to logout of NICE Inform (refer to Logging out from NICE Inform (see page 12)).

The applications available to you are:

- **Monitor**

- **Reconstruction**

- **Organizer**

- **Reporter**

- **Evaluator**

- **Audit** (available under the **Administration** menu)

- **User Administration** (available under the **Administration** menu)

- **System Administration** (available under the **Administration** menu)

- **Template Designer** (available under the **Administration** menu)

NOTE: If an application is not available for selection you either do not have the necessary privilege and/or license in order to access it.

5.1   Microsoft Active Directory user login

If there are one or more users that login to NICE Inform via a Microsoft Active Directory domain account and if the NICE Inform Server account has access to Microsoft Active Directory, the login dialog changes slightly as shown here.

Figure 5-2: Logging in screen (Active Directory)
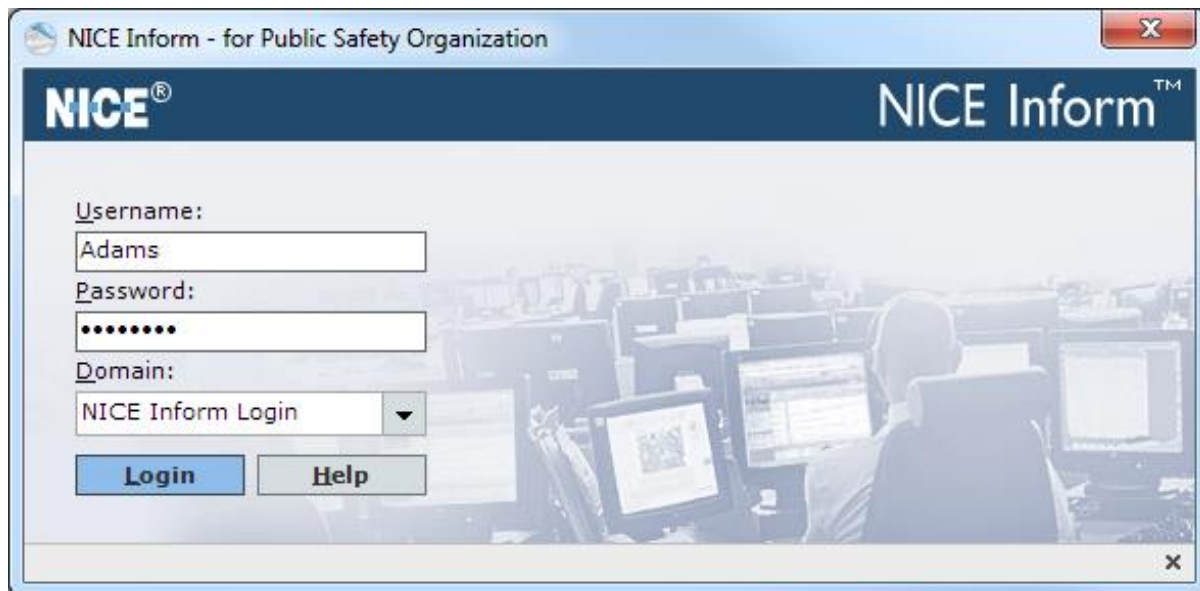
▶ To login in with your Microsoft Active Directory details:

1.   Enter your Microsoft Active Directory username and password in the text boxes provided.

2.   Do one of the following:

   –   Click the **Domain** down arrow and select the required Microsoft Active Directory domain from the list.

NOTE: Any Active Directory domain that the NICE Inform server can see is displayed in the list.

   If the last Active Directory domain that was connected to is found, it is automatically selected in the list.

   –   Enter the domain name in the **Domain** text box.

3.   Click the **Login** button. The NICE Inform application starts.

NOTE:	To login into NICE Inform using a NICE Inform user account, you **MUST** select the **NICE Inform Login** option from within the **Domain** list. You only see this if there are Microsoft Active Directory users as well as NICE Inform users configured in the system at the same time.
	The Domain section in the Login dialog is only displayed if one or more Microsoft Active Directory users have been added to NICE Inform either by adding a new user (refer to *Adding a new user to the system* in *NICE Inform User Administration*) or by Importing users (refer to *Importing users from an Active Directory domain* in *NICE Inform User Administration*).

5.2   Second Password

During the login process you may be presented with a **Second Password** dialog for you to enter a second password for further verification. If so, enter the second password and click the **OK** button.

The second password login option is configured within the NICE Inform User Administration application (refer to *Editing user details* in *NICE Inform User Administration*).

If the **Require second password** option is selected at the **Organization** level within the NICE Inform User Administration application (refer to *Setting security* in *NICE Inform User Administration*) and you do not have the second password set on an individual level, that you need to create a new second password during login. Within the **Set Second Password** dialog, enter the second password, confirm it and click the **OK** button.

5.3   Last login information

After entering your user details to log in to NICE Inform, a last login details message may be presented. This is only presented to you when the **Display last login information option** is selected within the User Administration application. For help setting this option, refer to *Setting security* in *NICE Inform User Administration*.

The last login information displays the following login security details:

- The number of unsuccessful login attempts.

- The date and time of the last unsuccessful login attempt.

- The date and time of the last successful login attempt.

- The workstation where the last successful login attempt occurred.

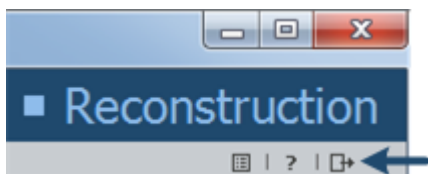Click the **OK** button to close the last login details message.

5.4   Logging out from NICE Inform

▶ To logout from NICE Inform:

1. Click the **Logout** icon the top right hand corner of the application:

Figure 5-3: Logout icon

2. You are presented with a confirmation message. Click the **Yes** button to confirm that you wish to logout.

5.5   Closing NICE Inform

▶ To close NICE Inform:

1. Click the red cross button in the top right corner of the application.

2. You are presented with a confirmation message.

3. Click the **Yes** button to confirm that you wish to close NICE Inform.

NOTE: Either logging out or closing NICE Inform saves your current preferences.

ABOUT NICE

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

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