How Do I Create & Manage Users

Create/Add a User

Each individual Quantify user should have a separate Quantify account. A user account is assigned permissions to restrict or allow access to Quantify features and functions, as well as access to recorded communications.

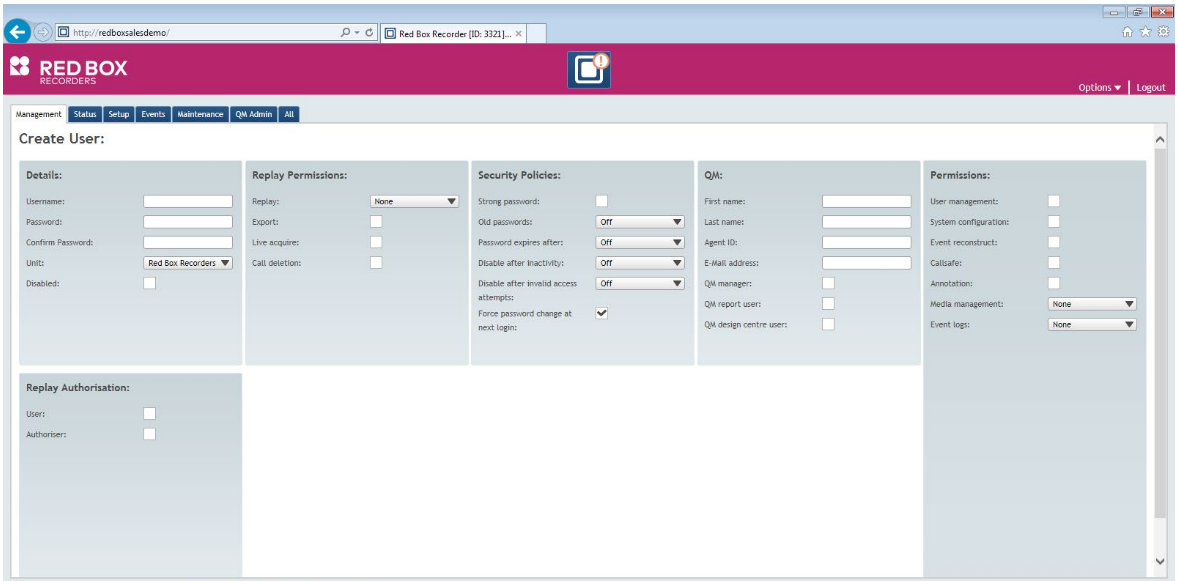
To create a user:

1. Login to Quantify with an administrator account (User Management permissions).
2. Go to **Configuration** > **Management** > **Users** and click the **Create** button.
3. Complete the **Create User** form (see below), and click the **OK** button when you're done.

Create User – Config Form

The six form panels are:

- **Details**: Main account details.
- **Replay Permissions**: Call replay permissions.
- **Security Policies**: Password and login security.
- **QM**: Quantify QM permissions. If you don't have Quantify QM, this panel won't be available.
- **Permissions**: General Quantify permissions.
- **Replay Authorisation**: Replay Authorisation role/permissions. If you don't have Quantify Replay Authorisation, this panel won't be available.

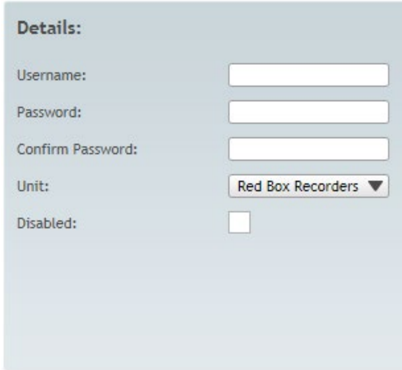


Red Box

Create User – Form Panels

The tables below provide detailed information on each of the panels and fields in the **Create User** form.

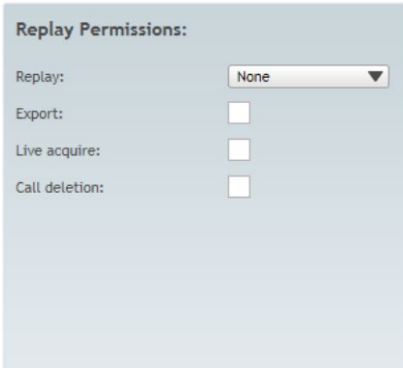
Details	
Username	Account username used for login.
Password & Confirm Password	Account password used for login.
Unit *	Assign the user to the selected "Unit". *
Disabled	Prevent the user from logging in. This can be useful where you want to disable an account (permanently or temporarily) but don't want to delete it - for example, if you use temporary agents on a regular basis you could enable and disable as needed.



* Units are only applicable to a licensed hosted recorder and may display using a different name.

Note: Active Directory users will also have some additional settings here.
Refer to your Active Directory Guide for information.

Replay Permissions	
Replay	Set the user's replay permissions: **None**: No calls can be replayed by this user. **Specific**: Allow user to replay specific calls only. You can specify database fields and/or security filters to define what calls can be replayed. **All**: Allow user to replay all calls. If this field is set to **Specific** or **All**, you can further restrict access to calls via **Replay Authorisation** (see below).
Export	Allow the user to export recorded calls to WAV files using Quantify Replay.
Live acquire	Allow the user to listen to live calls using Quantify Live Acquire.
Call deletion *	Allow the user to delete recorded calls. *



* The **Call Delete** function is very rarely available within Quantify. If you don't have **Call Delete**, this field won't be available.

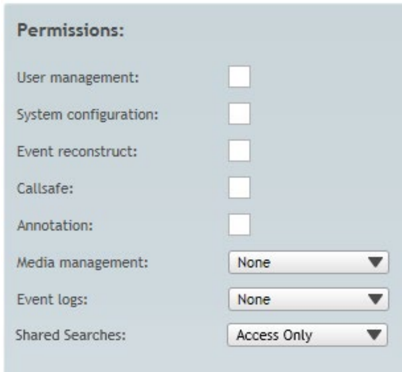
Security Policies	
Strong password	The password must contain at least one uppercase letter, one lowercase letter and one number.
Old passwords	Stops the user entering previously used passwords.
Password expires after	Password expires after specified period of time – user must then change their password.
Disable after inactivity	Account is disabled if the user does not log in within the specified period of time.
Disable after invalid access attempts	Account is disabled if more than the specified invalid logins attempts are made consecutively.
Force password change at next login	When the user next logs in they're forced to change their password.

QM *	
First name	User's first name.
Last name	User's last name.
Agent ID	Unique ID used to identify an agent. This is often used to specify a staff ID number or extension number.
Email address	User's email address used by QM to send Coaching emails.
QM manager	Assign QM Manager permissions to the user. A QM Manager can perform evaluations, run reports, and view available evaluation form types.
QM report user	Allow the user to run QM reports.
QM design centre user	Allow the user to view and edit available evaluation form types.

* If you don't have Quantify QM, this panel won't be available.

Permissions	
User management	Admin permissions – allow the user to create, modify and delete users (except their own details).
System configuration	Admin permissions – allow the user to configure and control the Red Box Recorder. For example, set up recordable devices, turn the recorder on/off, etc.
Event reconstruct *	Allow the user to access Quantify Event Reconstruct (if available).
Callsafe *	Allow the user to access Quantify Callsafe (if available).
Annotation	Allow the user to annotate recorded calls.
Media management	Set the user's media management permissions: **None** – no permissions. **Remove/Replace Replay Media** – remove replace removable archive media. **Full Media Control** – full removable archive media and Network Attached Storage (NAS) control.
Event logs	Set the user's event log access permissions: **None**, **Own logs only**, or **Full** (all users' logs).
Shared Searches	In Quantify 5C and above, you can set the user's access permissions for shared searches: **No Access** – no visibility of shared searches. **Access Only** – can view and use shared searches. **Create & Share** – create, share, view, use, and delete shared searches. Note that for Quantify 5A & 5B, only system administrators can create and share searches.

* Event Reconstruct and Callsafe are optional Quantify applications. If you don't have these applications, the fields won't be available.



Replay Authorisation *	
User	Allow the user to request to replay a call. Note that the user must also have their **Replay Permissions** set to **Specific** or **All** (see above) – although they will be able to see the calls in Quantify Replay and QM, they will have to request replay access.
Authoriser	Allow the user to receive, authorise and reject replay requests.

* If you don't have Quantify Replay Authorisation, this panel won't be available.

Edit, Delete, and Copy Users

Go to **Configuration** > **Management** > **Users**, highlight the user, and click the **Edit**, **Delete** or **Copy** button:

- **Edit**: Edit user account details, including password reset.
- **Delete**: Delete the user account. To delete multiple accounts, use the **Shift** and/or **Ctrl** keys to highlight multiple accounts, and click **Delete**.
  Note that although the user is deleted, all associated user data (annotations, event logs, QM evaluations, etc.) will not be deleted. Also, you can disable an account rather than delete it (**Edit** > **Details** > **Disabled**).
- **Copy**: Create a new user account, copying all non-personal data and settings from the highlighted user. This option is particularly useful when setting up users with very similar profiles.

Export User Account Data

5A

From Quantify 5A, you can export user account data. Go to **Configuration** > **Management** > **Users**, and click the **Export** button to export user account data to a CSV file. General account information will be exported (name, username, etc) along with a record of when the user last logged in. No passwords will be exported.

Note that data is exported as an unencrypted, accessible format, CSV file. Once exported, the data should be regarded as "uncontrolled" so you'll likely want to implement additional data protection measures for the file.

User Options

There are a few additional options available for user settings – go to **Configuration** > **Setup** > **User Options**

User Options	
Enable Client Browser Cookies	Tick to enable system use of cookies with Quantify.
Login Expiry Time	Select the idle time after which a user will be automatically logged out of Quantify.
Event Log Limit	Select the number of event logs to display "per page" (in the **Configuration** > **Events** pages).
Device Configuration Text	**Always show device text**: Use the device text automatically assigned by the recorder to identify the device in recording alarms. You can view **Device Text** for all devices from **Configuration** > **Setup** > **Recording** **Show channel names**: Use channel names (if available) to identify devices. In general, this is the preferred setting as channel names are usually more "user friendly".
Default Language	Select the Quantify UI language for all users. Only installed language packs are available.
Enable Downloads	This feature is provided for legacy customers only and can be ignored.

Troubleshooting

The following are a few common issues you may encounter:

Issue:	User can't login
Problem/ Solution:	• Incorrect password. To reset a user password, go to *User* > **Details** > **Password** and change the password, then go to the **Security Policies** panel and tick **Force password change at next login**. • Account disabled. To re-enable an account, go to *User* > **Details** and untick the **Disabled** option. • Account deleted.

Issue:	User can't see Quantify Search & Replay
Problem/ Solution:	• No replay permissions assigned. To assign replay permissions, go to *User* > **Replay Permissions** and assign appropriate permissions.

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