Innovative Phone Alerts
Web Portal

User Manual (Beta version)

Legal Notices

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1.0 INTRODUCTION

The Innovative Phone Alerts Web Portal (also referred to as "the Web Portal") is part of the Innovative Phone Alerts application. The Web Portal provides real-time management and monitoring tools, allowing you to observe and manage your patron audio transactions.

The intended audience is library managers involved in library-to-patron audio transactions, as well as operation managers interested in reports and analytics relating to such functionalities.

Prerequisites to understanding this document are a broad knowledge of the following:

- Innovative Phone Alerts application
- the library's patron communication strategy

2.0   LOG IN AND LOG OUT

Authorized users can log in to the Web Portal using the following URL:

> https://ipa.cgsis.com/iii/login.php

Innovative provides the initial login credentials. After you log in, Innovative recommends you change your password. See the *My Account* section below for information on how to change a password.
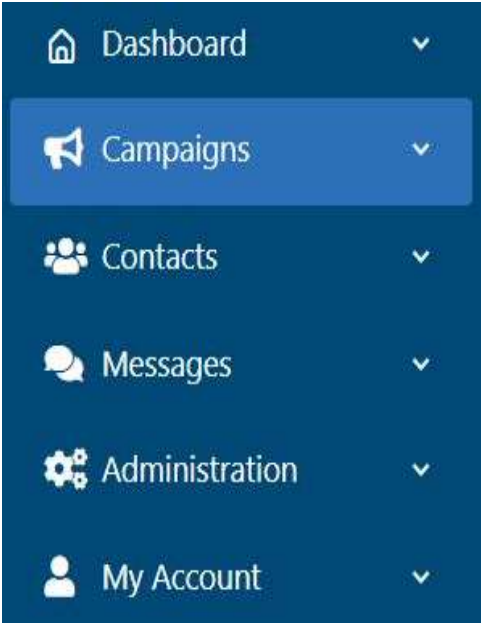
To log out of the Web Portal, select in the upper right corner.

3.0   MAIN DASHBOARD

After logging in, the Web Portal displays the main dashboard. This dashboard provides an overview of your campaigns and server status. For example:
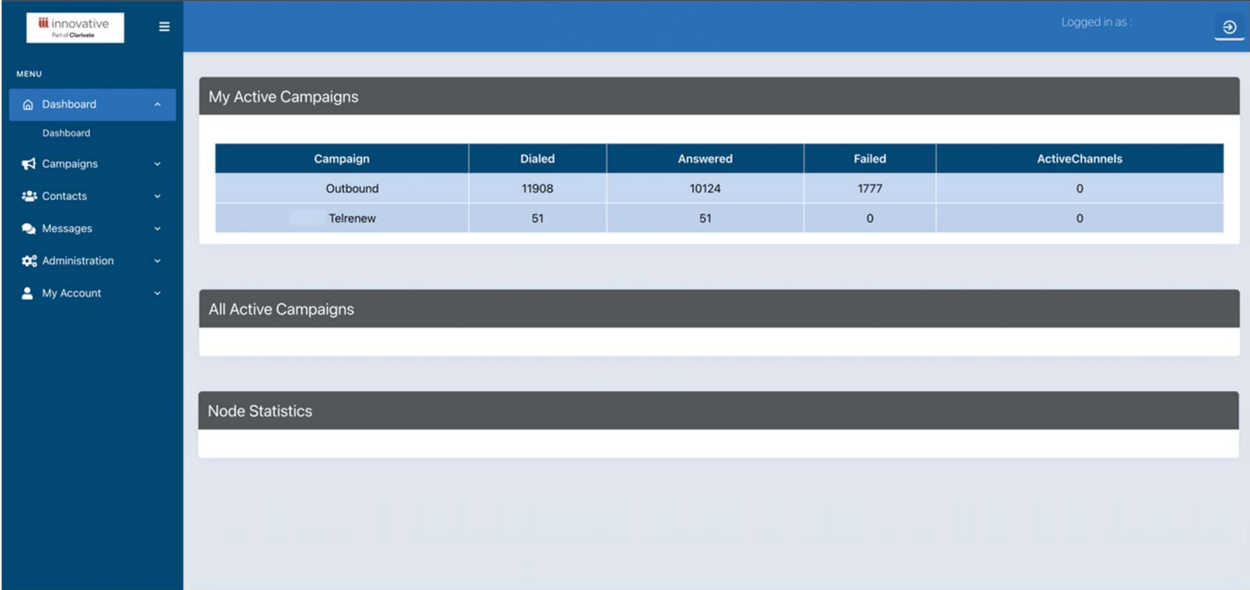
On the left side of the screen is the navigation menu.

Each tab in the menu contains one or more suboptions. To view the suboptions, click the tab.

4.0   CAMPAIGNS

About Campaigns

Campaigns refer to a type of communication with the patron. There are multiple types of campaigns, including library notifications (outbound) and telephone renewals (inbound).

The Campaigns Tab

The Campaigns tab provides tools for managing your campaigns. To access these tools, select **Campaigns**, and then select the Campaign **Management** suboption. The Web Portal displays the Campaign Management screen, which contains a list of your campaigns, including the ones that are actively running. For example:

From the Campaign List screen, you can:

- Monitor the progress of a campaign
- View campaign results and statistics
- Research campaign transactions

Monitor the Progress of a Campaign

While a campaign is actively running (that is, dialing or receiving calls), you can select **Monitor** in the Operations column to view the **Campaign Monitor** screen. For example:

Campaign Statistics

Name	Phone	Status	Ring Time	Answer Time	action
	5555551111	initiated ▾	28 sec	0 sec	Array
	3338764321	answered ▾	22 sec	44 sec	[Hangup] ✗ ▾

This screen shows all active connections (the contacts actively being called or who have called into the system). For each connection, the Web Portal displays the following:

- The patron's phone number being serviced
- Status of the call. Possible values include:
  - Initiated - The system made the call, but it has not been answered yet.
  - Answered - The system answered the call. You can see the amount of time passed since the phone call was answered as noted in the Answer Time.
- Ring Time - The amount of time the call has been ringing.
- Answer Time - The amount of time that has passed since the phone call was answered.

For answered calls, you can end the call by selecting **Hangup** in the action column.

View Campaign Results and Statistics

From the Campaign Management screen, you can view the results of a specific campaign by selecting **Results** in the Reports column. The Portal displays the results for that campaign on the Campaign Summary screen.

Here is a sample Campaign Summary screen:

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This screen shows the number of calls answered vs. not answered and whether the calls were answered by a live person or an answering machine. Additionally, there are other details to further help you understand the results of the campaign.

From this screen, you can:

- Print the results by selecting **Print**.
- Export your results in CSV format and save them to your device by selecting **Export**.

Research Campaign Transactions

From the Campaign Summary screen, you can view transactions for a category by clicking the category name (for example, Answered). The Web Portal displays the transactions for that category. For example:

To help you navigate long lists, you can:

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- Use the pagination tool and the **Jump to Page** box at the bottom of the page.
- Filter the transactions using the Filter Settings at the bottom of the page. Enter a name and/or phone number, and select **Filter Calls**.

The following screen shot shows these navigation tools:

| 04/29/2022 12:00:36 | SMITH, JOHN | | 5555551111 | Answered | [Call Detail] ✏️ ▾ |
| 04/29/2022 12:00:13 | DOE, JOHN | | 1237893256 | Answered | [Call Detail] ✏️ ▾ |

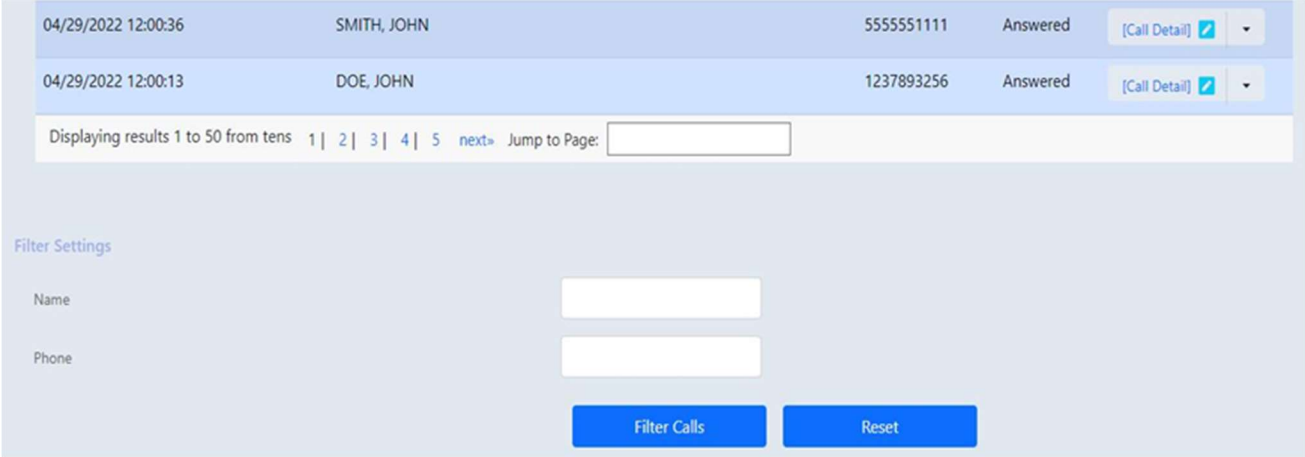Displaying results 1 to 50 from tens 1| 2| 3| 4| 5 next» Jump to Page: [＿＿＿＿＿＿]

Filter Settings

Name   [＿＿＿＿＿＿]

Phone [＿＿＿＿＿＿]

[Filter Calls]   [Reset]

Once you have located the desired transaction, select **Call Detail** to view the full transaction details. For example:

Call Time Info

Dialed At   09:19:00

Answered At   09:19:23

Ended At   09:20:22

Call Duration   58 sec

Call Response

AMD Detection   machine

Contact Info

Custom Value #1   123456   Phone Number   5555551111

Custom Value #2   p123321   Name (Last, First) SMITH, JOHN

Custom Value #3   11   Email

Custom Value #4   05-05-2022
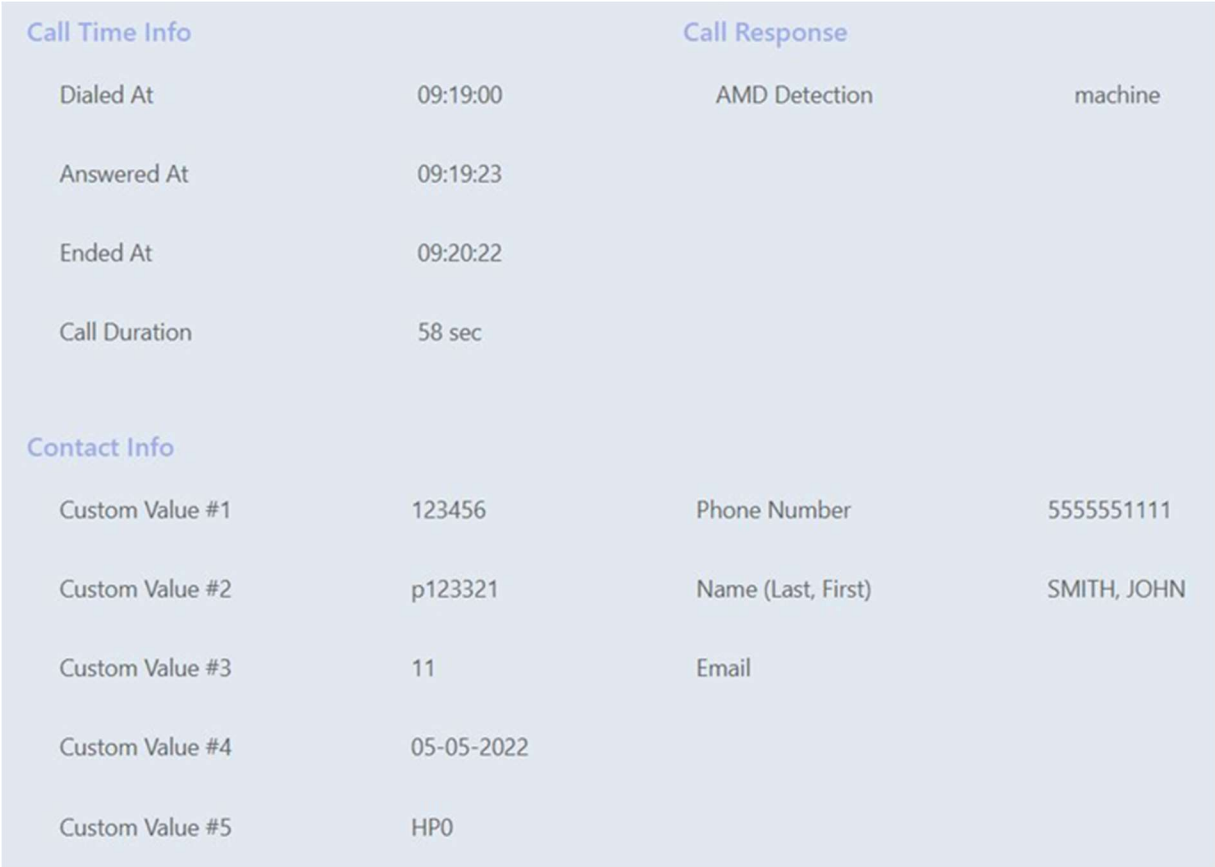
Custom Value #5   HP0

Understanding the Custom Fields

The Call Details screen includes details about the call, the patron's information, and how the call was answered. This screen also includes custom fields, as follows:

- Custom Value 1 - The unique Call ID assigned by the system
- Custom Value 2 - The contact's patron ID number, as received from the ILS
- Custom Value 3 - The port location, as received from the ILS
- Custom Value 4 - The Hold Until Date for held items, as received from the ILS
- Custom Value 5 - The message that was played for the patron (for example, "HP0" for a hold message 0 or "OD0" for an overdue message)

When the message refers to a hold, the value "HP0" appears in the custom value #5, and the date for the hold appears in custom value #4. For example:

Contact Info	
Custom Value #1	4321567
Custom Value #2	p5554321
Custom Value #3	10
Custom Value #4	4-20-2022
Custom Value #5	HP0

When the message refers to an overdue book, the value "OD0" appears in Custom Value #5, and the Custom Value #4 field is blank. For example:

Contact Info	
Custom Value #1	4321567
Custom Value #2	p5554321
Custom Value #3	10
Custom Value #4	
Custom Value #5	OD0

5.0   CONTACTS

About Contacts

IPA maintains contacts for the patrons using the system. Separate contacts are kept for inbound (renewal) and outbound (library notifications) transactions. Patrons who use both types of transactions will have two contacts in the system, however, the system does not link them together.

Inbound contacts contain only the phone number the patron used to call in and the barcode or Patron ID entered in the system. (The barcode/Patron ID is recorded in the **Custom Value #1** field.)

Outbound contacts contain information provided by the ILS system, including:

- Patron name
- Patron's phone number
- Custom values, as follows:
    - Custom Value 1 - The unique Call ID assigned by the system
    - Custom Value 2 - The contact's patron ID number, as received from the ILS
    - Custom Value 3 - The port location, as received from the ILS
    - Custom Value 4 - The Hold Until Date for held items, as received from the ILS
    - Custom Value 5 - Type of message played for the patron (for example, "HP0" for a hold message 0 or "OD0" for an overdue message)

The Contact Tab

The Contacts tab allows you to view and edit contacts and to manage the Do Not Call (DNC) list. You can view the entire list of contacts or the contacts associated with a group (for example, all telerenew contacts).

The following shows a sample contact list:
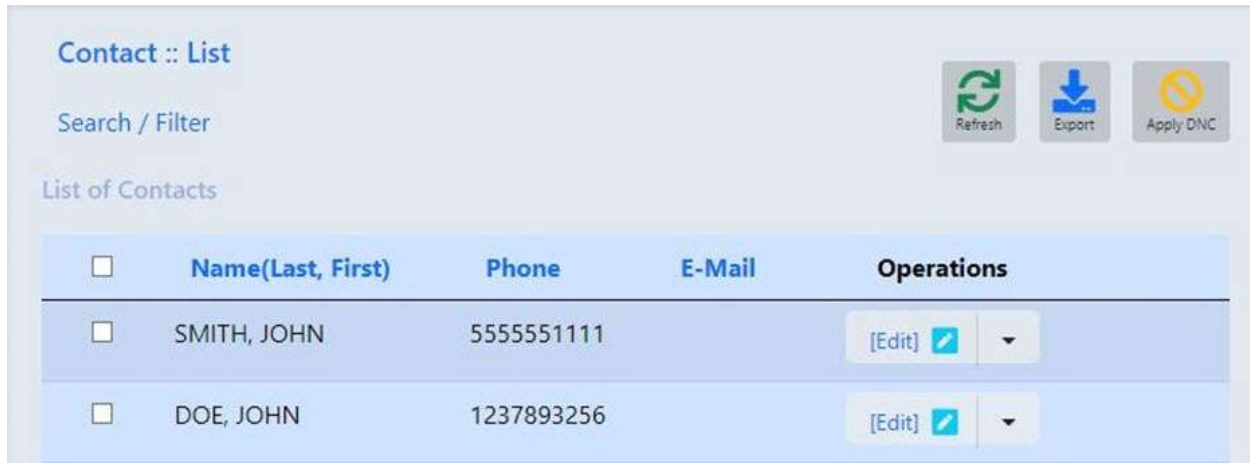
View and Edit Contacts

To view or edit a contact:

1. Do one of the following:
   - To view contacts for a specific group, select **Contacts**, and select the **Contact Groups** suboption. Then select **View Contacts** under the Operations column to view the contacts for that group.
   - To view the entire contact list, select **Contacts**, and select **Contacts** suboption.

   A list of contacts appears.

2. (Optional) You can filter the contacts by selecting **Search / Filter**. Select your search and filter criteria, and select **Search**. Note: you can click the **Date** field to access the full range of date-related search options.
   You can return to the full list at any time by selecting **Search / Filter** and selecting **Reset**.
3. Locate the contact you want to view or edit. You can use the pagination tool and the **Jump to Page** box at the bottom of the page to help navigate long lists.
4. Once you have located the contact, select **Edit** under the Operations column. The Web Portal displays the information for the contact.
5. Do one of the following:
   - To edit the contact, enter your changes, and select **Save**.
   - To finish viewing the contact (without making changes), select **Cancel**.
   The Web Portal returns you to the list of contacts.
6. (Optional) From the list of contacts, you can also do the following:
   - To export the list of contacts, select **Export**. The Web Portal generates a comma-separated values (.csv) file named "contact.csv" and saves it to the **Downloads** folder on your computer.
   - To add one or more contacts to the DNC list, check the boxes on the left-hand side of the screen beside the contact you want to add to the list, and select **Apply DNC**. The Web Portal adds them to the DNC list. See "Managing the Do Not Call (DNC) List" for more information.

Managing the Do Not Call (DNC) List

The Do Not Call (DNC) list prevents patrons from being contacted in any campaign. To access the DNC, select **Contacts**, and select the **Contact Groups** suboption.

The following shows a sample DNC List:

From this list you can:

- **Remove a contact** - To remove a contact from the DNC list, check the box next to the contact, and select **Delete Selected**.
- **Add a new contact** - To add a contact to the DNC list, click **Add new**, enter the patron's name and phone number. The phone number must be the complete number without the country code or any spaces or punctuation. For example, a phone number of (312) 555-1234 must be entered as "3125551234". When finished, select **Save**. The Web Portal adds the contact to the list and returns you to the DNC list.
- **Export the list** - To export the DNC list, select **Export**. The Web Portal generates a comma-separated values (.csv) file named "contact_dnc.csv" and saves it to the **Downloads** folder on your computer.

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6.0   MESSAGES

The Messages Tab provides a list of your library's current recorded messages, including Hold, Overdue, Library announcements, IVR inbound and outbound menus. To access this list, select **Messages**, and select the **Recordings** sub-option.

The following shows a sample list of recordings:

From this screen, you can:

- Listen to a recording - Select **Play** under the Operations column.
- Download a recording - Select the down arrow under the Operations column, and then select **Download**.

To help you navigate longs lists, you can:

- Use the pagination tool and the **Jump to Page** box at the bottom of the page.
- Filter the recordings by selecting **Search / Filter**. Select your search and filter criteria, and select **Search**. Note: you can click the **Date** field to access the full range of date-related search options.

7.0   ADMINISTRATION

The Administration Tab allows you to manage the staff users who can access the Web Portal. Use this screen to:

- Add new users and roles
- View and edit current Web Portal users

When you select **Administration | User Management**, the Web Portal displays a list of users.

Adding a New User to the Web Portal

To add a new user:

1. Select **New User** in the upper-left corner. The User Detail form appears.

Personal Contact Info	
Email	
First Name	
Last Name	
Phone	
Mobile	
Street Address	
Library	
Country	Canada
Locale Settings	
Timezone offset	Friday, April 29, 2022 16:26 (GMT)
Language	English, American

2. Do the following:
    a. Enter a **User Name**. Note that this field cannot be changed after you create the user's account.
    b. Ensure the **Status** is set to "Active".
    c. In the **User Role** section, select "iii_library". The Web Portal moves it to the Selected list.
    d. Enter a **Password**.
    e. (Optional) In the **Personal Contact Info** section, enter the user's personal information.
    f. In the **Locale Settings** section, select a timezone and language.
3. Select **Save** to save the user.

Editing the Information for an Existing User

After adding a user, you can edit their information at any time.

To edit a user's information:

1. From the list of users, select **Edit** on the right-hand side of the screen under the Operations column. For example:

	Username	First Name	Last Name	Email	Library	Owner	Role	Status	Operations
☐	Network			Library@local.library	Library	Library	iii_library	Active	[Edit] ✐ ▾

The Web Portal opens the User Details form.

2. Enter your edits.

   Note**:** You cannot delete a user; however, you can change the **Status** to "Disabled" to prevent that user from accessing the Web Portal.

3. When you are finished, select **Save**.

8.0   MY ACCOUNT

The My Account Tab allows you to manage the Web Portal's main account. Using these options, you can:

- View details for the library's main account
- Change the password for the main account

View the details for the library's main account

To view the details for the library's main account manager:

- On the menu, select **My Account**, and then select the **My Account** suboption.

  The Web Portal displays the details for the library's main account. For example:

Change the password for the main account

To change the password associated with the main account:

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1. On the menu, select **My Account**, and then select the **Change Password** suboption. The Password screen appears.

2. Enter a new password.

3. Select **Save**.