Customer Experience Portal

Login and Registration

December 14, 2015
CXP User Guide

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Customer Experience Portal also known as CXP provides a single sign on (SSO) gateway for clients to access reports, dashboards, tool and other content.

### Table 1-1

<table>
<thead>
<tr>
<th>Date</th>
<th>Change Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/26/12</td>
<td>Formatting updated, and change history added.</td>
</tr>
<tr>
<td>10/9/14</td>
<td>Updating Guide from WIC Portal to Customer Experience Portal</td>
</tr>
<tr>
<td>12/14/15</td>
<td>Updated screenshots for version 4.0</td>
</tr>
</tbody>
</table>

### System Requirements

**Browsers supported:**

- Firefox 21.0+
- Google Chrome 30.0+
- Internet Explorer 8.0 – 11.0

- Documents Repository-specific features only supported in IE 11.0 when in Compatibility View

### Conventions in this Guide

This user guide adheres to the conventions outlined in the following section. These conventions help you locate, identify, and interpret information more quickly and efficiently.
Typographical Conventions

The following information describes the typographical conventions used throughout this user guide. These conventions ensure consistency, and aid in performing procedures more quickly and efficiently.

### TABLE 1-2

<table>
<thead>
<tr>
<th>Kind of Text</th>
<th>Text Style</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>important terms or concepts</td>
<td>sans serif bold</td>
<td>utterance</td>
</tr>
<tr>
<td>text that represents a variable, such as</td>
<td>default font italic</td>
<td><img src="image" alt="example" /></td>
</tr>
<tr>
<td>a filename or a value that the user must enter</td>
<td></td>
<td><img src="image" alt="example" /></td>
</tr>
<tr>
<td>keyboard options, button names, menu</td>
<td>Default font bold</td>
<td><img src="image" alt="example" /></td>
</tr>
<tr>
<td>sequences, and other GUI items</td>
<td></td>
<td><img src="image" alt="example" /></td>
</tr>
</tbody>
</table>

Icons

This user guide includes icons that appear in the margins. These icons focus your attention to the following types of important information:

**Caution Icon:** warns you that a step you are about to take may produce undesirable results

**Note Icon:** highlights an important piece of information or explains the reason we do things a certain way
Accessing the Customer Experience Portal

At the top of the West Interactive web site (http://www.westinteractive.com), click the ‘Login’ link, and then select Customer Experience Portal. Alternatively, users may open CXP directly at https://portal.westapp.com

**FIGURE 1-3**

Login from West Interactive Page

**FIGURE 1-4**

Customer Experience Portal Login Page
XP gives clients a single link to access reporting and tools. CXP is accessed from the West Interactive website.

First Login

Enter the assigned Username and initial Password, which was sent via email and then click ‘Login’.

It is suggested to highlight the password, right-click the mouse and ‘copy’ the password. Then click in the password field, right-click the mouse again and select ‘paste’.

---

Dear [name],

Welcome to the Customer Experience Portal! A new user account has been created for you to access this site.

Username: [username]

Temporary Password: [password]

Please login into Customer Experience Portal to access your account.

Please bookmark this link as this is the address to access the Customer Experience Portal from this point forward.

As a first time user, you will see a registration page. Fill out the required information along with selecting a new password.

Thank you,
The Customer Experience Portal Team
Interactive Services

New User Welcome Email
New User Registration

At first login, a new user must complete the user registration. All fields except for Username can be edited. Fields with an asterisk (*) must be completed.

To register, follow these steps:

1. Enter CXP password
2. Confirm CXP password
3. Choose 3 Security Questions/Answers (used if user forgets password)
4. Click ‘Register & Logout’

Password must have at least eight (8) characters, of which at least one must be a numeric (0 to 9), or special (e.g. @,$,%,&,+,-) character and at least one must be an alpha character, and a character may not appear consecutively more than twice.

New User Registration Page
Security Questions

Select three (3) unique questions from the following security questions, and enter the answer to the right. The security questions are used when resetting a forgotten password.

Security answers are free-form text with no formatting requirements, for example, the phone number answer can have any format 402-111-2222 or 4021112222. Security answers are case-sensitive and users will need to remember how they formatted their answer.

FIGURE 2-3

Security Questions

Completing New User Registration

To complete registration, click ‘Register & Logout’ button. The user is automatically logged out, and must login again using the new password. A confirmation email is sent.

FIGURE 2-4

New User Registration Confirmation Email
Login

After User Registration is complete, the user must use their Username and new Password to login.

Login Page

Forgot Username/Password

Click the link under the login button to retrieve Username or Password.

Forgot Username/Password Links
Forgot Username

Enter Email address, and then click ‘Submit’. Username will be sent via email.

*FIGURE 2-7*

*Forgot Username Page*
Forgot Password

Click the ‘Forgot password’ link under the login button to reset the password. Enter Username, and then click ‘Submit’. Complete security question answered during registration.

**FIGURE 2-8**

Forgot Password Page

**FIGURE 2-9**

Forgot Password Security Questions Page
Reset Password Page

Expired Password

Passwords expire every 90 days. If a password expires, user is prompted to change it immediately after logging in.

CXP sends an e-mail notification to the user 5 days prior to the date of password expiration. If the user does not take any action, another e-mail is sent 2 days prior to the password expiration date.

Password Expired Reminder Email
Expired Password

Delete User Account for Inactivity

The user account will be permanently deleted after 60 days of password expiration. CXP sends email notifications 30 days after and 55 days after the password has expired.