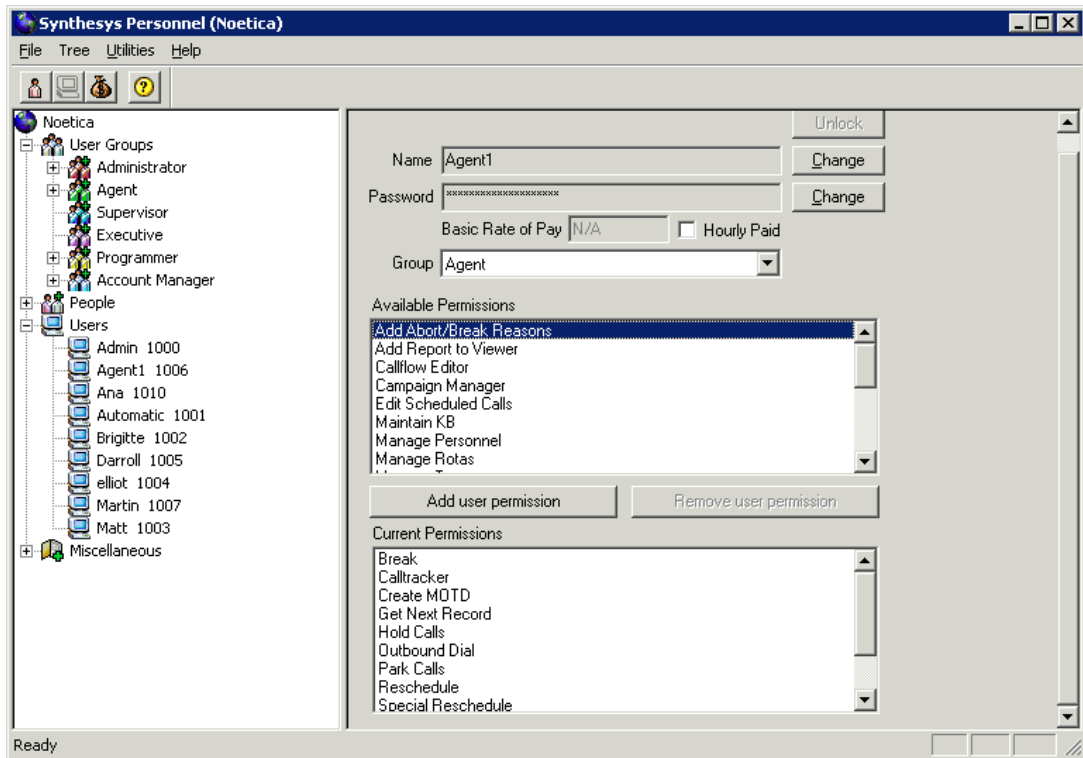


# SYNTHESYS PERSONNEL



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## Introduction

Synthesys Personnel is used to set up and maintain details about individuals using Synthesys. All staff members are assigned user accounts and permissions to determine the extent to which they can use the system. Access to Synthesys Personnel will usually be restricted to users such as System Administrators or Heads of Departments.

The key areas within Synthesys Personnel are *User Groups*, *People*, *Users* and *Miscellaneous*.



**User Groups:** All staff members are assigned to a particular user group, which indicates their role or responsibilities within the company. The predefined user groups include, among others, *Administrator*, *Agent*, *Supervisor* and *Account Manager*. Each standard user group has a set of permissions assigned to it, which can be changed if and as required

**People:** All personal information of call centre staff is kept under the *People* branch. Details recorded include name, address, telephone number and date of birth.

**Users:** This area contains details of each user account that has been set up. A user account is created for each member of staff that uses *Synthesys* and contains their user name, password, the user group they belong to and the permissions that have been assigned to them.

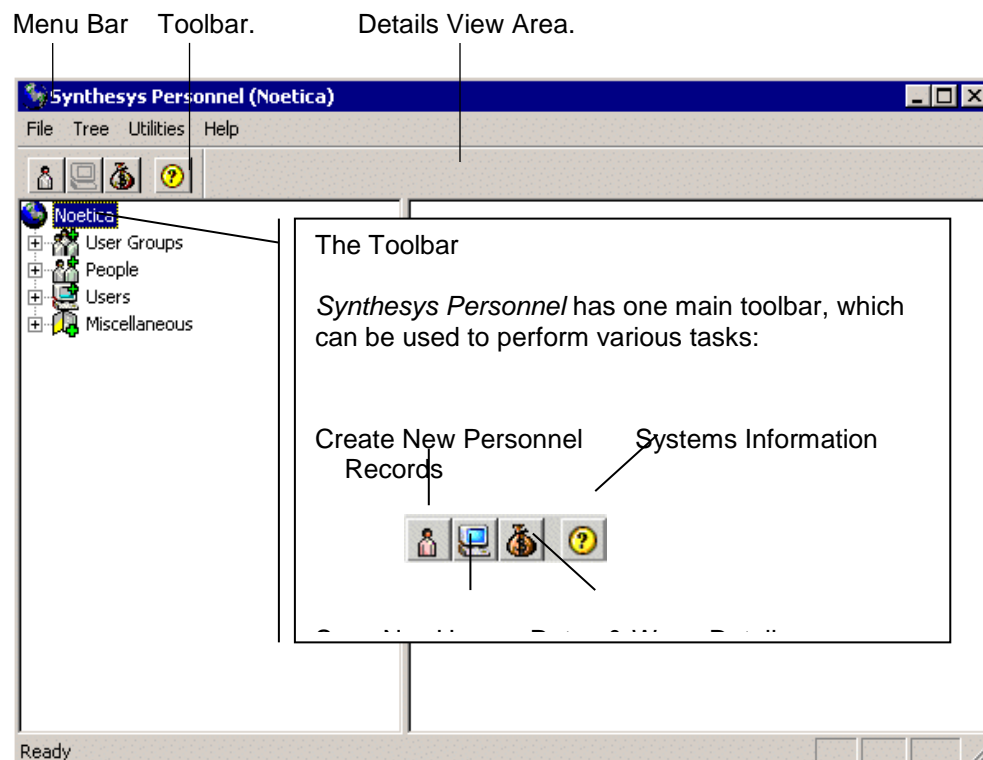
**Miscellaneous:** Details such as wage runs and payment rates for staff are recorded here.

## Synthesys Personnel Main Screen

To start the Synthesys Personnel Manager:

- Click on **Personnel** under the **Manage** heading of the Synthesys main screen.

This will open Synthesys Personnel, provided that you have the appropriate access permission.



## The Menu Bar

The menu bar at the top of the Synthesys Personnel Main Screen provides access to a series of menu options via two pull down menus.

### *File Pull Down Menu*

<b>Option</b>	<b>Used To</b>
Exit	Close Synthesys Personnel and return to the Synthesys main screen.

### *Tree Pull Down Menu*

<b>Option</b>	<b>Used To</b>
Show Users By ID	Sort and display users according to their ID.
Show Users By Name	Display user names in alphabetical order.

### *Utilities Pull Down Menu*

<b>Option</b>	<b>Used To</b>
Recover deleted User	Restore a deleted user back into the People and User.
Delete Rate	Delete the currently selected Rate entry.

### *Help Pull Down Menu*

<b>Option</b>	<b>Used To</b>
About Synthesys Personnel	Display information about the version of Synthesys Personnel you are running.
Noetica Help Manual	Opens the <i>Noetica Help manual</i> , providing guidance to using the Synthesys application.


## Directory

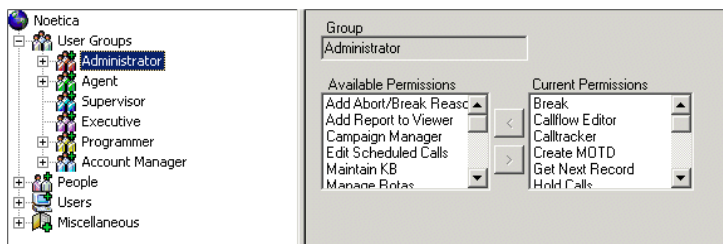
Details that are set up and maintained using *Synthesys Personnel* are grouped into four main areas, represented by branches.


A branch is displayed for each of the area *User Groups*, *People*, *Users* and *Miscellaneous*:



To view items stored within an area:

- Click on the  symbol located next to the area to expand the branch.
- Click on the items belonging to an area to display permission details in the *Details View Area*.



If there is no  symbol next to a branch, this means that no items are currently held in that area of *Synthesys Personnel*.

Please see next page for more information.

## User Groups


User Groups are set up to group individuals into areas of responsibility, authorisation level or job role.

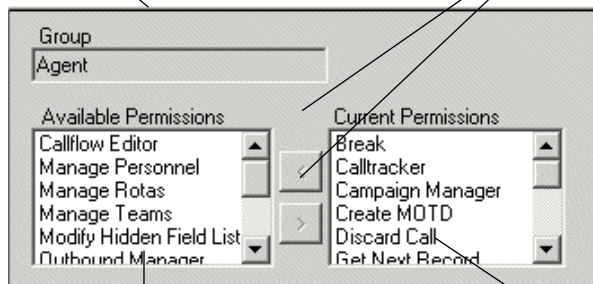


The groups shown above are pre-defined groups that come with the software. It is not possible to add or rename the existing user groups but you can change the current access permissions available for each *User Group* as required.

User Groups are configured in the Details View Area:


The name of the group is displayed here

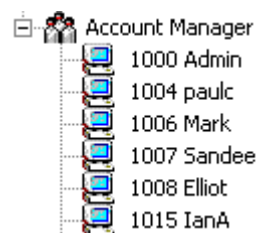
These  buttons are used to assign or remove permissions to the group.



Permissions that can be assigned to the user group are shown here.

The permissions that have been assigned to the user group are shown here.

If any *Users* have been assigned to a *User Group*, a  symbol is displayed next to the *User Group* branch. If you click on this symbol to expand the branch, the *Users* belonging to that group are displayed:

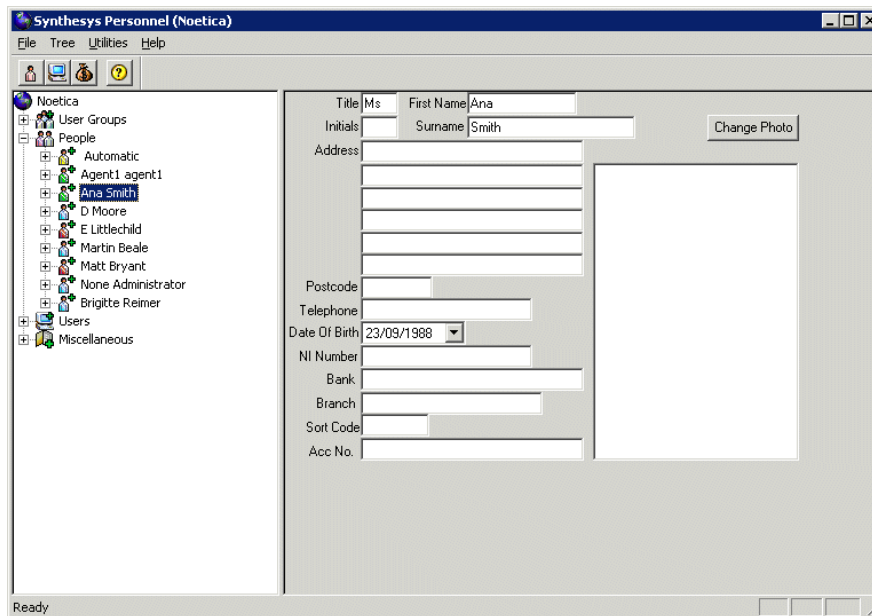



Clicking on one of the users will display that users account details.

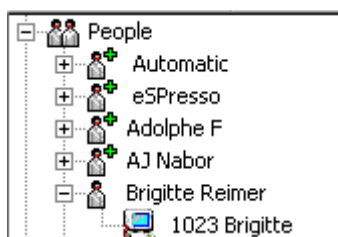
## People

Details relating to each call centre member of staff are stored in *Synthesys Personnel* under the *People* branch:

- Select a name to show the details recorded for that member of staff, including name, address, contact telephone numbers, date of birth and bank details.
- To attach a photo of the person, click the **Change Photo** button.



Clicking on the  symbol displayed next to a persons name will expand the branch and display the *User* account.

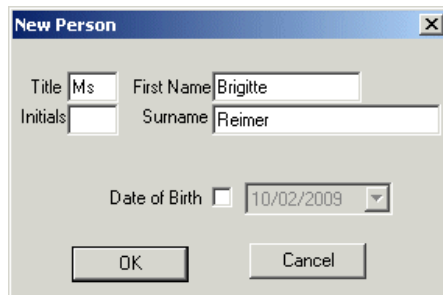




## Adding a new User

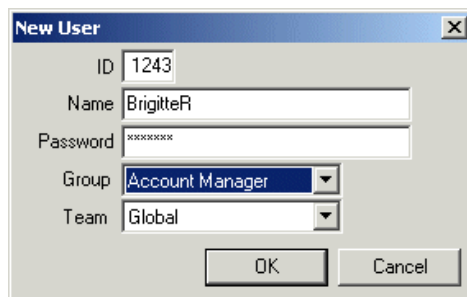
Staff using *Synthesys* must be set up within *Synthesys Personnel*.

- Click on the **New Person**  icon at the *Personnel main screen* and enter the user details as required.



- Click OK to display the *New User* window.

The user *ID* is automatically generated by *Synthesys*. The user name entered is displayed, showing the user's first name and the first letter of the surname.



- Enter the *Password* that the new user will use to access *Synthesys*.
- Next, select a *User Group* for the member of staff. The *Group* to which individuals are assigned determines the access privileges within *Synthesys*.
- Finally, select the *Team* to which you want to assign the user.
- Click OK to confirm the details for the new user, who will now be able to log on and use the *Synthesys* system.

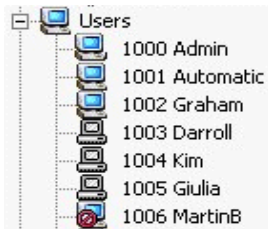


*Any changes made in Synthesys Personnel are automatically saved on exiting the Synthesys Personnel Manager.*

## Viewing User Accounts and Details

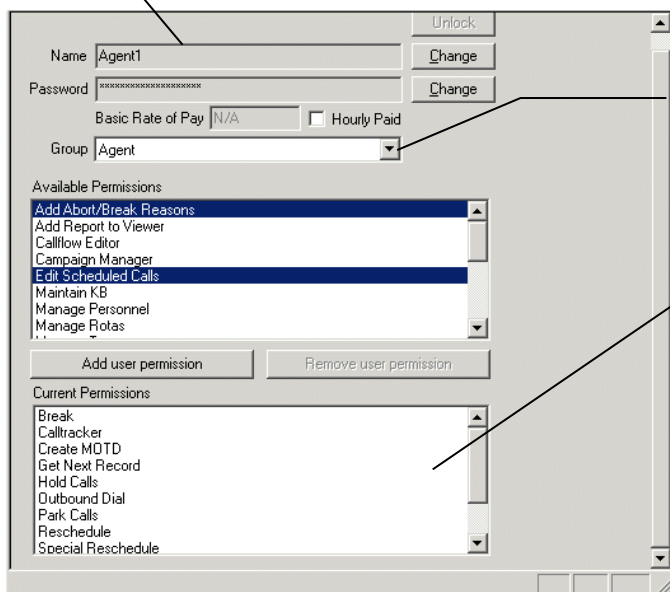
When staff details are entered into *Synthesys*, a user account is also defined, which allows them access to the system.

User account details are stored in *Synthesys Personnel* under the *Users* branch:



A *User* account controls which *Synthesys* modules a member of staff has access to and details their system *User Name* and *Password*.

The name and password to be entered by the member of staff to access *Synthesys*.



The *User Group* to which the member of staff belongs is selected from the Group drop down menu.

The permissions that are assigned to the selected user group are automatically displayed in the Current

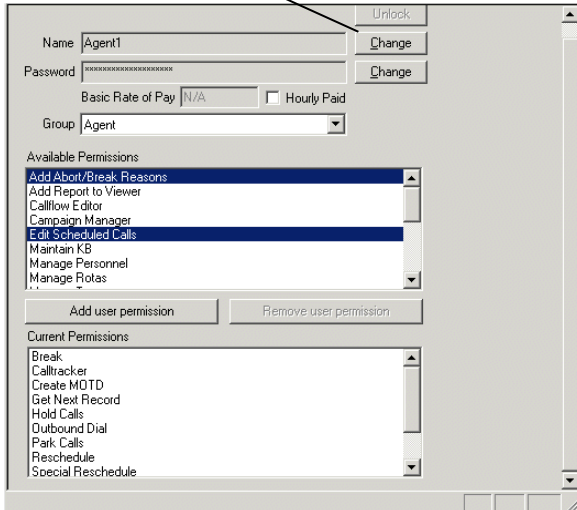
Please see the next section for details about modifying user details.

## Modifying User Name and Password

The details associated with a user account can be modified at any time.

To change the **Name** assigned to a user:

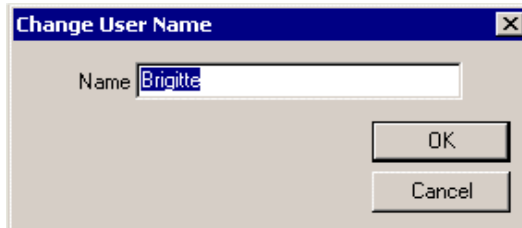
- Click the **Change** button next to the user name field.



The screenshot shows a user management window with the following fields and buttons:

- Name: Agent1 (with a **Change** button next to it)
- Password: [Redacted] (with a **Change** button next to it)
- Basic Rate of Pay: N/A
- Hourly Paid:
- Group: Agent (dropdown menu)
- Available Permissions list:
  - Add Abort/Break Reasons
  - Add Report to Viewer
  - Callflow Editor
  - Campaign Manager
  - Edit Scheduled Calls
  - Maintain KB
  - Manage Personnel
  - Manage Rotas
- Buttons: Add user permission, Remove user permission
- Current Permissions list:
  - Break
  - Calltracker
  - Create MDTD
  - Get Next Record
  - Hold Calls
  - Outbound Dial
  - Park Calls
  - Reschedule
  - Special Reschedule

- Enter the new user name into the **Change User Name** dialog.



The 'Change User Name' dialog box contains:

- Title: Change User Name
- Name field: Briqitte
- Buttons: OK, Cancel

To change the **Password** for a user account:

- Click the **Change** button next to the user password field to open the **Change Password** window.
- Enter the old and the new password and confirm the new password.



The 'Change Password' dialog box contains:

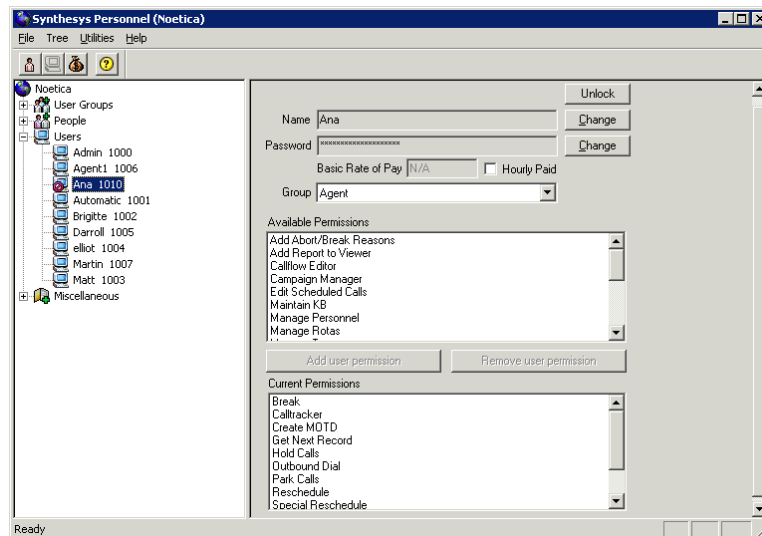
- Title: Change Password
- Old Password field: [Redacted]
- New Password field: [Redacted]
- Confirm New Password field: [Redacted]
- Buttons: OK, Cancel

## Unlock Access

Users logging on entering an incorrect password will be locked out of the system after the third incorrect attempt.

To enable access again, supervisors need to:

- Select the name of the person under the **Users** category and click the **Unlock** button.



- Enter the old, or a new password for the user into the first field of the **Unlock User** dialog.
- Confirm the password and click OK.



## Available User Permissions

Permissions	Used To
Add Report to Viewer	Permission to add a new SQL report to the Report Viewer.
Break	Enable the Break icon on the Telephony toolbar, to allow agents to notify the dialler that they wish to go on a break.
Callflow Editor	Access the Campaigns module, to enable users to design, edit and save callflows
Call Tracker	Access the Call Tracker, to enable users to take follow-up actions
Campaign Manager	Access the Reports module, to enable users to delete accounts and campaigns and to manage reports and report schedules in the Campaign Manager.
Create MOTD	Allow agents to create and delete messages of the day
Discard Call	Permission to use the Discard Call icon in the Call Tracker to move a selected call into the Discarded folder.
Edit Scheduled Calls	Permission to edit rescheduled calls displayed in the Call Diary. To disallow agents editing calls via the call diary, remove the <i>Edit Scheduled Calls</i> permission at Agent GROUP level from the <i>Current Permissions</i> into the <i>Available Permissions</i> box.
Get Next Record	Enable the Next Record icon on the Telephony toolbar, to allow agents to pick up the next Preview Outbound call
Hold Calls	Enable the Hold and Take off Hold icons on the Telephony toolbar, to allow agents to put calls on hold and to retrieve them
Maintain KB	Maintain the Synthesys Knowledge Base, currently in development.
Manage Personnel	Access the Personnel Manager, to enable users to add, modify and delete users and to manage user permissions
Manage Rotas	Allow users to create and manage rotas for call out procedures in the Call Tracker
Manage Teams	Access the Team Manager, to enable users to add and delete teams and to assign agents and campaigns to teams
<b>Open Script Permissions</b>	If the <i>OpenScriptPermission=True</i> in the Synthesys INF file, agents need the <b>AllowOpenScript</b> permission, to use <i>Open</i> or <i>File Open</i> to manually open a callflow in the Agent – Start Work module. If <i>OpenScriptPermission=False</i> <u>no</u> permission check for <i>Allow Open Script</i> will take place.
<i>Allow Open Script</i>	
<i>Screen Pop with Data</i>	The <b>Screen Pop with Data</b> permission is required to enable agents to open/ search for a customer record via the <i>Open with call data dialog</i> , rather than the record being presented by the dialler. Absence of the permission will disable the <i>Open with call data</i> option.

*Permissions in Synthesys Personnel continued*

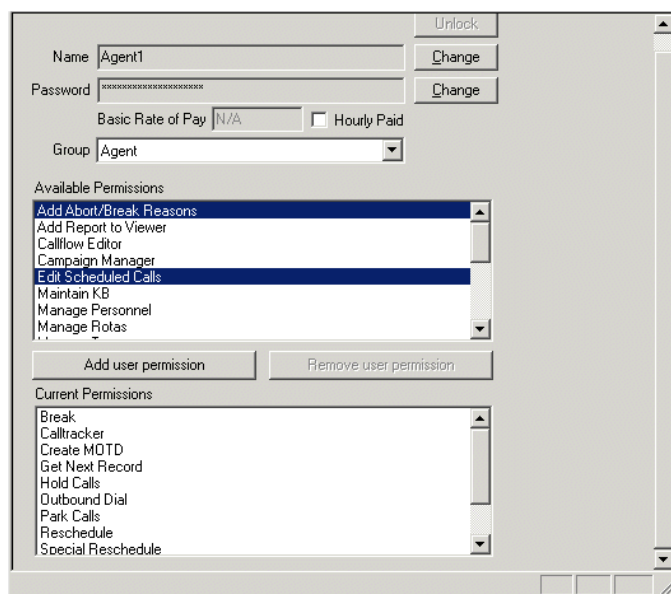
<b>Permission</b>	<b>Used To</b>
Outbound Dial	Enable the Dial and Hang up icons on the Telephony toolbar, to allow agents to dial and hang up Preview Outbound calls
Outbound Manager	Access the Outbound Manager, to enable users to add, modify and delete Outbound lists.
Park Calls	Enable the Park and Unpark icons on the Telephony toolbar, to allow agents to park and retrieve parked calls
Queue Calls	Access the Outbound Manager, to enable users to create and manage call lists
Re edit Call	Access the Call Tracker, to enable users to re run callflows and to edit call data
Release Scripts	Enable users to release callflows in the Campaigns module so that agents can take calls on the latest version.
Report Viewer	Access the Report Viewer to view available SQL reports.
Reschedule	Enable the Reschedule icon on the Telephony toolbar, to allow agents to arrange callbacks
Run Live Monitor	Access the Live Monitor, to enable users to view real-time statistics on all live campaigns and agent performance
Special Reschedule	Enable the Special Reschedule icon on the Telephony toolbar, to allow agents to arrange call-backs, rescheduling calls with call data
Take Calls	Allow access to the Start Work screen in the Agents module, to enable agents to take calls
Transfer Calls	Enable the Transfer icon on the Telephony toolbar, to allow agents to transfer calls
View Hidden Fields	Allows users to view 'hidden' database information in the Synthesys Call Tracker. For security reasons certain information, i.e. credit card numbers, can be hidden from the view of agents by entering the corresponding database column names into the Blank.ini file, which is located in the Synthesys etc folder on the Server.
Modify Hidden Field List	Allows users to view the database column names associated with <i>Hidden Fields</i> in the Call Tracker.
View Scheduled Calls (no CRM; with CRM)	View details of rescheduled calls with including or excluding CRM information in the Call Diary

## Adding and Editing User Permission

All access permissions that are available in Synthesys are displayed in the *Available Permissions* box. The actual access permissions assigned to an individual user are displayed in the *Current Permissions* box.

To assign Synthesys access permissions for a selected user:

- Select the access permissions that you wish to assign in the *Available Permissions* box.
- Click the **Add user permission** button to move the selection from the *Available Permissions* box into the **Current Permissions** box.



The screenshot shows a user management window with the following fields and sections:

- Name:** Agent1 (with a Change button)
- Password:** [Redacted] (with a Change button)
- Basic Rate of Pay:** N/A (with an input field and a checkbox for **Hourly Paid**)
- Group:** Agent (dropdown menu)
- Available Permissions:** A list box containing: Add Abort/Break Reasons, Add Report to Viewer, Callflow Editor, Campaign Manager, Edit Scheduled Calls, Maintain KB, Manage Personnel, Manage Rotas. Below this list are **Add user permission** and **Remove user permission** buttons.
- Current Permissions:** A list box containing: Break, Calltracker, Create MDTD, Get Next Record, Hold Calls, Outbound Dial, Park Calls, Reschedule, Special Reschedule.

To remove Synthesys access permissions for a selected user:

- Select the permissions that you wish to remove in the *Current Permissions* box.
- Click the **Remove user permission** button to move the selection out of the *Current Permissions* box into the *Available Permissions* box.



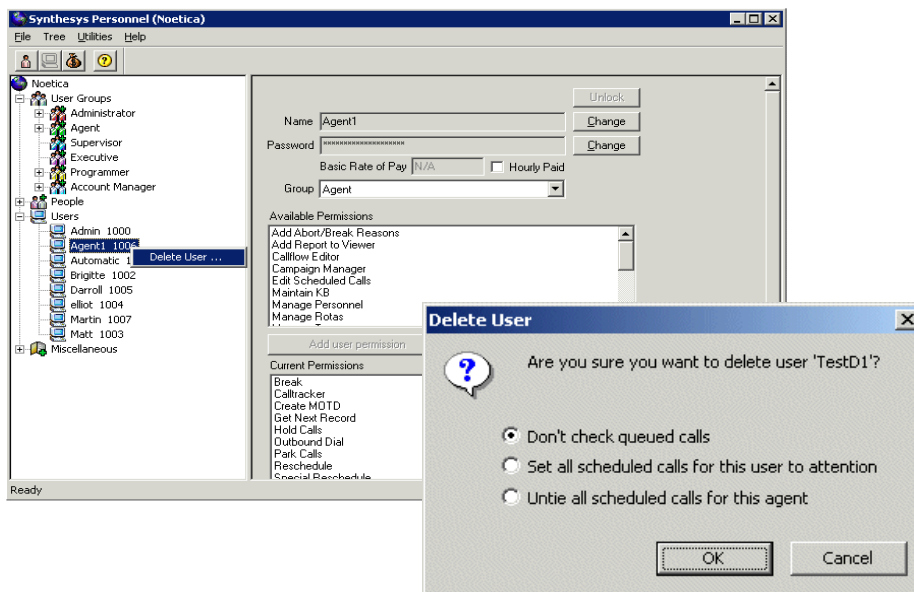
*The access permissions that have been assigned to a user are shown in the Current Permissions window.*

## Deleting Users

A user can be removed, for example, if staff members reach the end of their contract.

To remove a user from Synthesys Personnel:

- Go to the **Users** directory, right click on the user that you want to delete and select **Delete User**.
- In the **Delete User dialog**, specify how you want to deal with calls that have been scheduled for the user that is to be deleted.



- You can ignore the call queue.
- Set all calls scheduled for the selected user to *Attention* supervisor.
- Untie them from the user to enable other agents to take these calls.

On clicking **OK** the user will be removed from Synthesys Personnel.



*Deleted users will also automatically be removed from any team to which they had been assigned and the queue table will be updated, as required.*

*Users currently logged into the Synthesys system cannot be deleted.*

*To maintain DB integrity and to facilitate the running of your reports, users are not actually deleted, but rather deactivated. It is therefore possible to recover deleted users again, together with all associated details.*

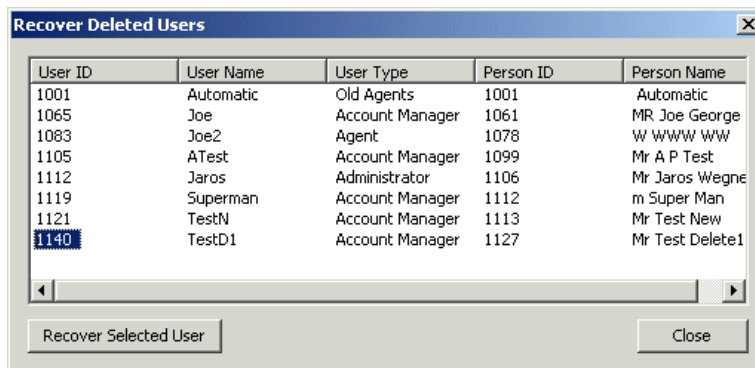
*Please see the next page for details.*



## Recovering deleted Users

To recover a deleted user:

- Go to **Utilities** on the menu bar and select **Recover Deleted User**.
- In the dialog now displayed, select the **User ID** of the user that you wish to recover and then click the **Recover Deleted User** button.



The system now checks that the user name does not match any user name currently in use.

If the name is being used by an existing user, the message '*This name is already being used, user cannot be reactivated*', will be displayed.

If not, the user will again be added to the *People* and *Users* directories and to the team the agent was previously assigned to.

Should this team no longer exist, the system will automatically assign the user to the Global team.

## Rates and Wage Details

Details recorded under the *Miscellaneous* branch of the Personnel Directory, include Rates and Wage Run Details.

These details relate to the wages that members of staff receive, the hours that they work and the rates that apply to the hours of work.

