MANAGING & MONITOR
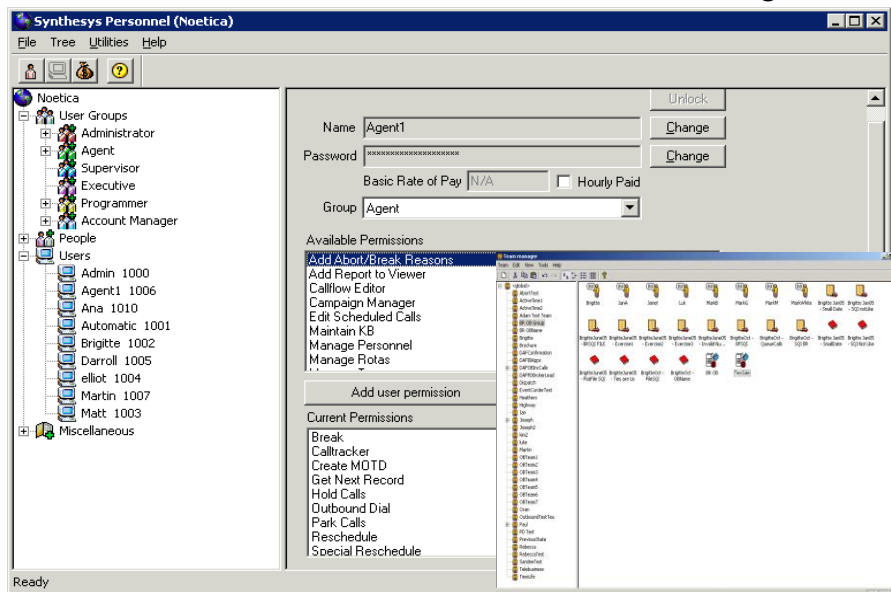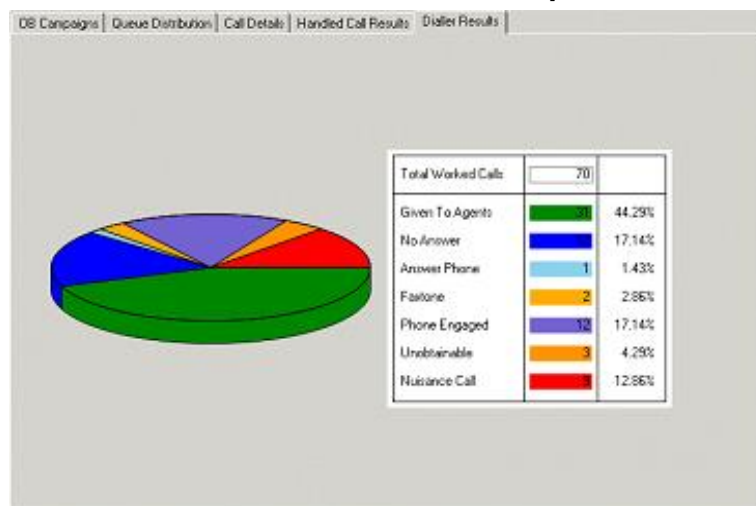
Functions

Personnel, Teams & Call Blender, Inbound Manager

Live Monitor, Switch Monitor & Report Viewer

Software Release Version 4.4

Document Version: 1.3

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Notes prepared by Brigitte Reimer and Luke Harris

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SYNTHESYS MANAGING & MONITOR FUNCTIONS

PERSONNEL

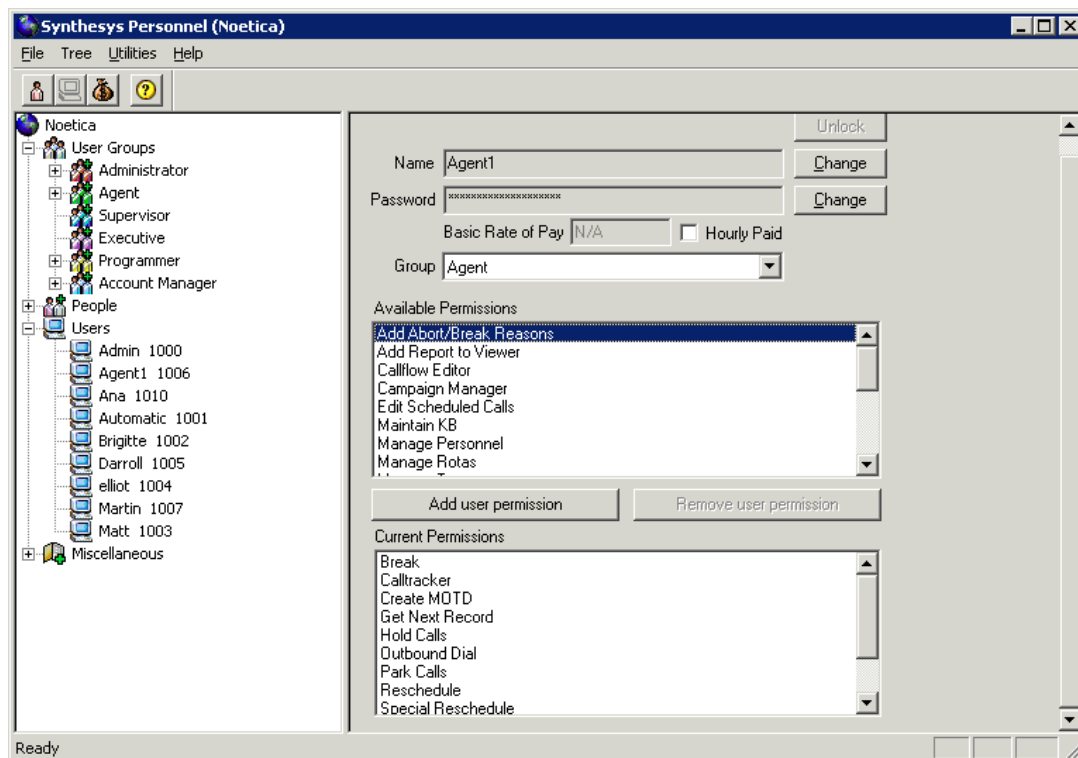## The Synthesys Personnel Manager

SYNTHESYS PERSONNEL MANAGER

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.

Menu Bar   Toolbar.   Details View Area.

The Toolbar

Synthesys Personnel has one main toolbar, which can be used to perform various tasks:

Create New Personnel   Systems Information
   Records

Save NewUser   Rates & Wage Details
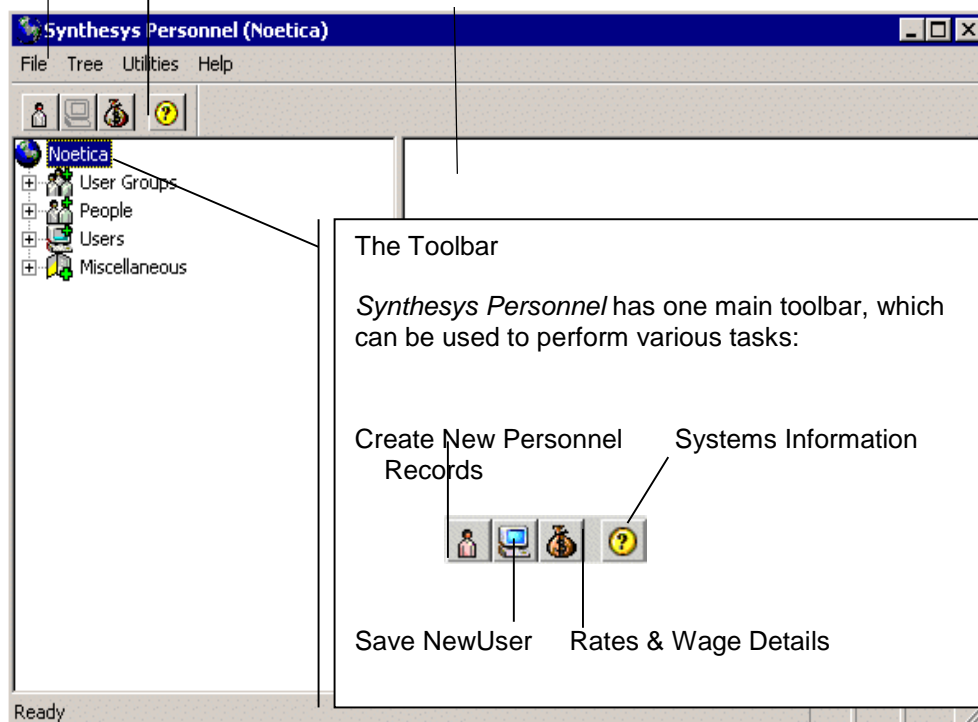
The Menu Bar

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

Option	Used To
Exit	Close Synthesys Personnel and return to the Synthesys main screen.

Tree Pull Down Menu

Option	Used To
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

Option	Used To
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

Option	Used To
About Synthesys Personnel	Display information about the version of Synthesys Personnel you are running.
Noetica Help Manual	Opens the *Noetica Help manual,* 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 D*etails View Area*.
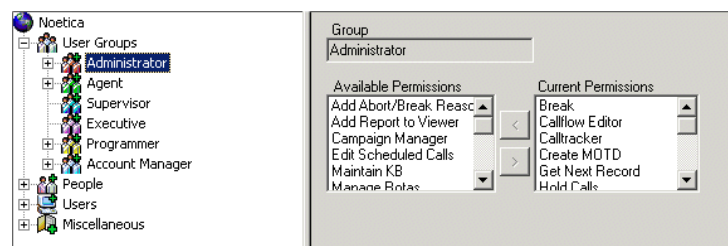
If there is no ⊞ symbol next to a branch, this means that no items are currently held in that area of *Synthesys Personnel*.

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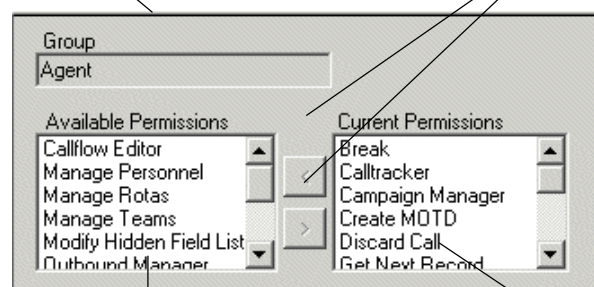
Permissions that can be
assigned to the user group
are shown here.

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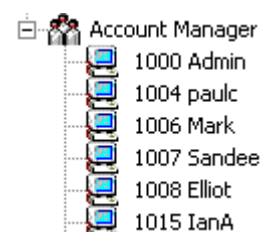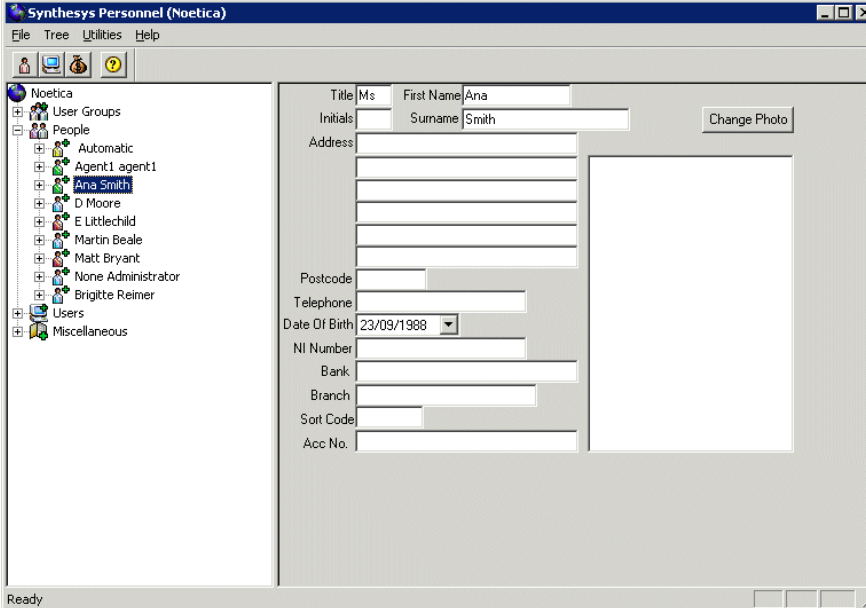
Clicking on one of the users will display that users account details.

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.
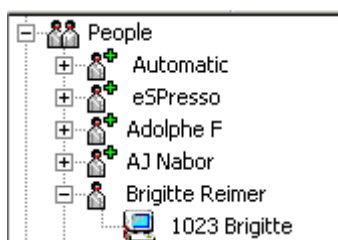
Adding a new User

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.

![New Person dialog box with Title "Ms", First Name "Brigitte", Initials blank, Surname "Reimer", Date of Birth checkbox "10/02/2009", OK and Cancel buttons]

- 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.

![New User dialog box with ID "1243", Name "BrigitteR", Password "*******", Group "Account Manager", Team "Global", OK and Cancel buttons]

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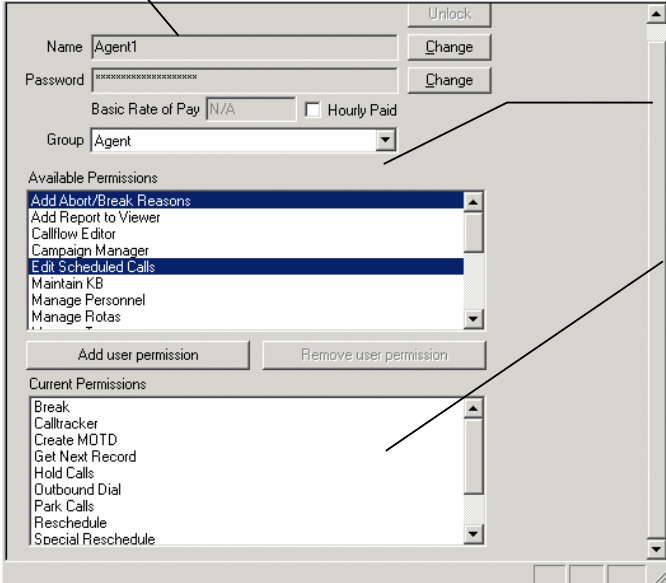
When staff details are entered into *Synthesys*, a user account is also defined, which allows them access to the system.

User account details are stored in *Synthesys Personnel* under the *Users* branch:
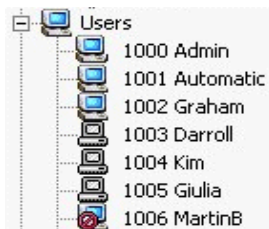
A *User* account controls which *Synthesys* modules a member of staff has access to and details their system *User Name* and *Password.*

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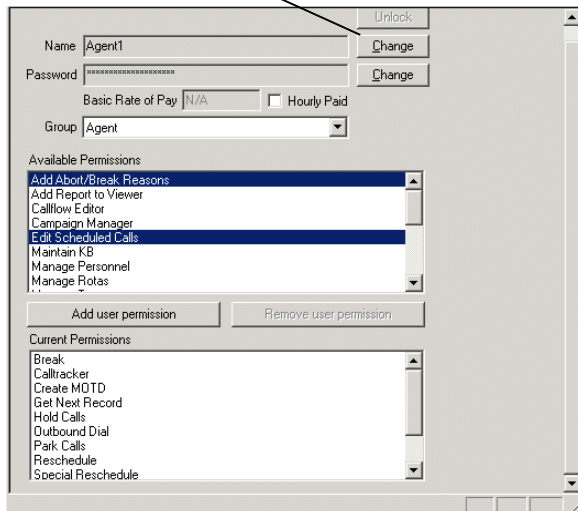
Please see the next section for details about modifying user details.

Modifying User Name and Password

The details associated with a user account can be modified at any time.
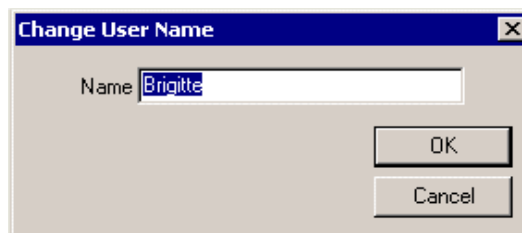
To change the *Name* assigned to a user:

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

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

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.

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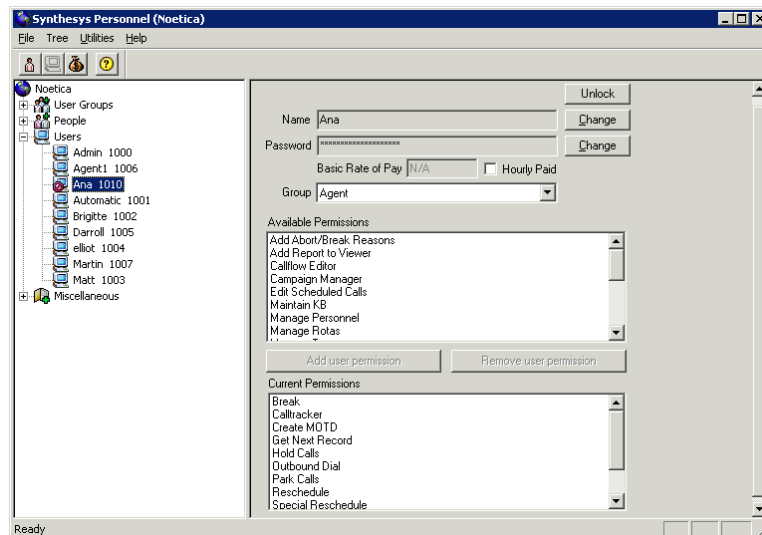
- Enter the old, or a new password for the user into the first field of the *Unlock User* dialog.

- 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 *Edit Scheduled Calls* permission at Agent GROUP level from the *Current Permissions* into the *Available Permissions* 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
Open Script Permissions *Allow Open Script*	If the *OpenScriptPermission=True* in the Synthesys INF file, agents need the **AllowOpenScript** permission, to use *Open* or *File Open* to manually open a callflow in the Agent – Start Work module. If *OpenScriptPermission=False* <u>no</u> permission check for *Allow Open Script* will take place.
Screen Pop with Data	The **Screen Pop with Data** permission is required to enable agents to open/ search for a customer record via the *Open with call data dialog,* rather than the record being presented by the dialler. Absence of the permission will disable the *Open with call data* option.
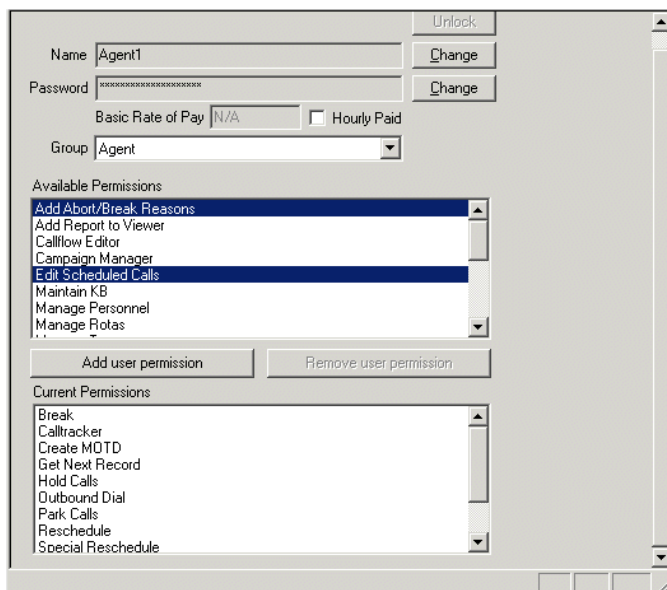
Permission	Used To
Outbound Dial	Enable the Dial and Hang up icons on the Telephony toolbar, to allow agents to dial and hang up Preview Outbound calls
Outbound Manager	Access the Outbound Manager, to enable users to add, modify and delete Outbound lists.
Park Calls	Enable the Park and Unpark icons on 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 callfows 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 *Hidden Fields* 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.

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.
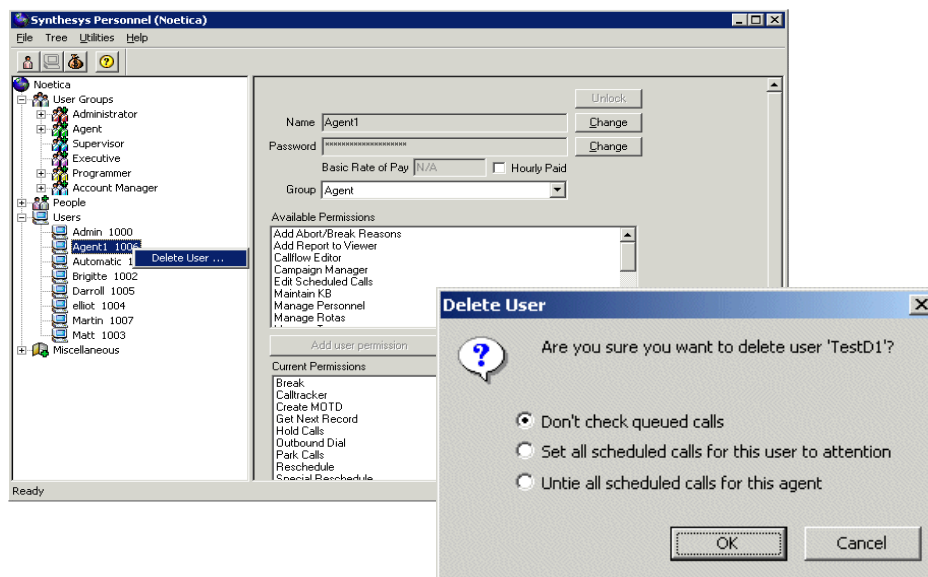
- You can ignore the call queue.

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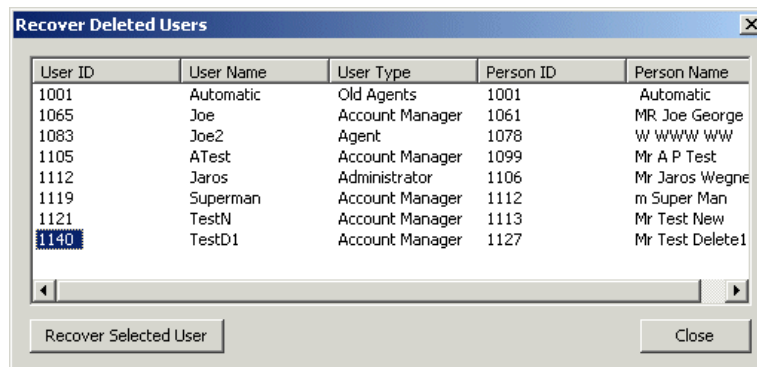
The system now checks that the user name does not match any user name currently in use.

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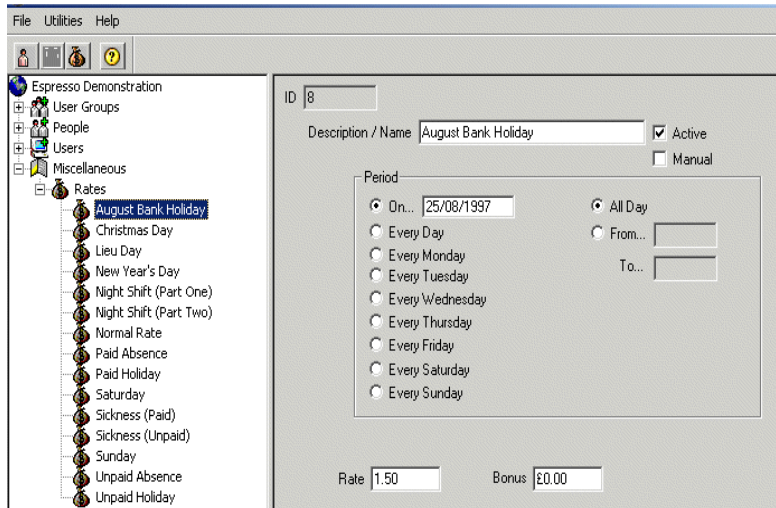
If not, the user will again be added to the *People* and *Users* directories and to the team the agent was previously assigned to.

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.

TEAMS

The Synthesys Team Manager

THE SYNTHESYS TEAM MANAGER

Introduction

The Team module of Synthesys allows you to assign individual agents to particular Inbound and Outbound lists, reflecting the skill level and expertise of the agents and to control the distribution of workload throughout the call centre.

To determine whether or not an operator has permission to use a given campaign, check, if the campaign is within the scope of the operator.

GLOBAL TEAM

The *Global Team* initially lists all agents that have been registered in Synthesys Personnel and all Inbound callflows, Outbound lists and Outbound groups that have been created in Synthesys.

Agents belonging to the *Global Team* have only permission to take calls on I/B callflows, O/B lists and O/B groups within the global team space.

OUTER TEAMS

Outer Teams are teams that have been set up under the directory of the *Global Team*.

Agents assigned to the *Outer Teams* can only take calls on any I/B callflows, O/B lists and O/B groups contained within the *Outer Team*.

INNER TEAMS

Inner Teams are teams set up under the directory of an *Outer Team* or any sub teams that are set up under an *Inner Team* directory.

Agents in the *Inner Teams* only have permission to take calls on I/B callflows, O/B lists and O/B groups from the *Inner Teams*.

Starting Synthesys Teams

To start the Synthesys Team Manager:

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

This will display the Team Manager main screen. Clicking on <global> displays the *Global Team*, initially listing all agents that have been registered in Synthesys Personnel and all Inbound callflows and all Outbound lists and groups that have been created in Synthesys.

The screen print below shows all agents and campaigns of the *Global Team*.

Menu Bar   Toolbar   Details View Area

The following section will give information about setting up New Teams and show how agents and campaigns can be added and removed.

 Agent

 Team

 Outbound list

 Inbound callflow

 Outbound Group

The Toolbar

The Synthesys Team Manager has one main toolbar, which can be used to perform various tasks:

Icon	Used To
	Set up a new Team
	Cut the current selection and place it on the Windows Clipboard.
	Copy the current selection.
	Paste the contents of the Windows Clipboard into the current record at the cursor point.
	Undo and Redo the last action that was preformed on the system.
	Display teams, agents, callflows and Outbound lists in large size icons.
	Display teams, agents, callflows and Outbound lists in small size icons.
	Display teams, agents, callflows and Outbound lists in a list format
	Display information such as name, type and description of teams, agents, callflows and Outbound lists.
	Display program information, version number and copyright details for Synthesys Personnel.
	Broadcast Teams Updates, to broadcast team changes instantly, so that agents can pick up any updates directly, without having to logoff and back on again.

Setting up New Teams

Any number of teams can be set up in the Team Manager, to allow the grouping together of specific agents and Outbound lists.

To set up a new team, initially under the global team and subsequently under any existing outer or inner teams:

- Locate and right click on the team and select *New Team* from the drop down menu.
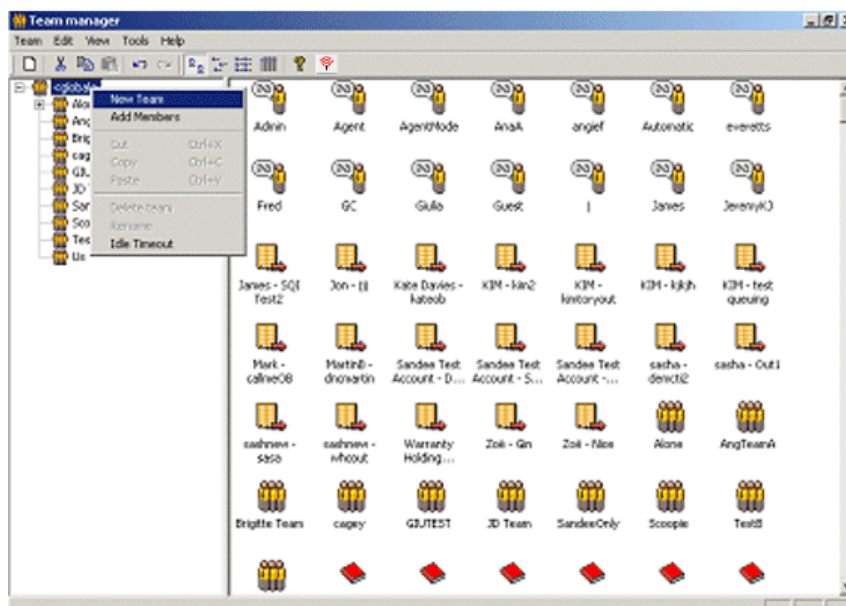
In the New Team dialog:

- Type the name of your team into the *Name* field and add any additional information, as required, into the *Description* box.
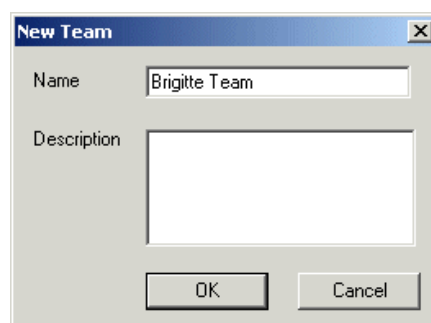
Teams set up under the Global Team directory are referred to as Outer teams.

Inner teams are teams set up under the directory of an Outer team or sub-teams set up under the directory of an inner team.

Adding Agents and Outbound Lists to a Team

Use the *cut and paste* option, if you wish to assign specific agents, Outbound lists or Outbound groups to a team but do <u>not</u> want them to remain in the Global or any other team.

Using cut and paste to add Members to a Team

In the Global team:

- Right click on the agents, Outbound lists and groups that you wish to assign to another team and select ***Cut*** from the drop down menu.
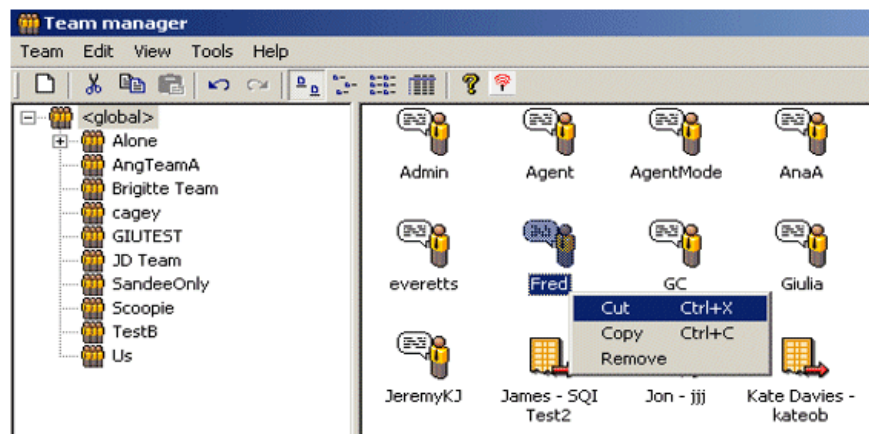
- Next, select the target team, right click and select ***Paste*** to paste the selected agents, Outbound lists and Outbound groups into that team.

When cutting & pasting an Outbound list, the callflow on which this Outbound list is based will automatically be moved into the team as well.

If you try to move a callflow without the corresponding Outbound list, a Message dialog will open, reminding you that you can't move the callflow without the associated Outbound list.
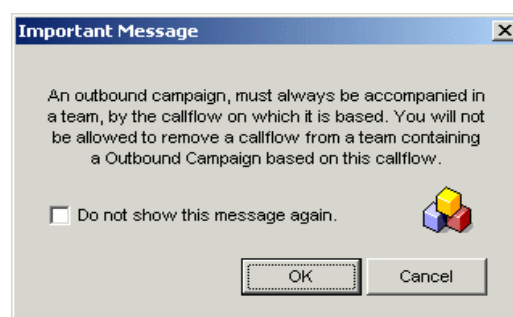
Using copy and paste to add Members to a Team

Use the *copy and paste*, *click and drag* or *Add Members* options, to assign specific agents, Inbound callflows, Outbound lists and Outbound groups to more than one team.

To copy and paste team members using the *Add Members* option:

- Right click on the target team and select *Add Members* from the list.
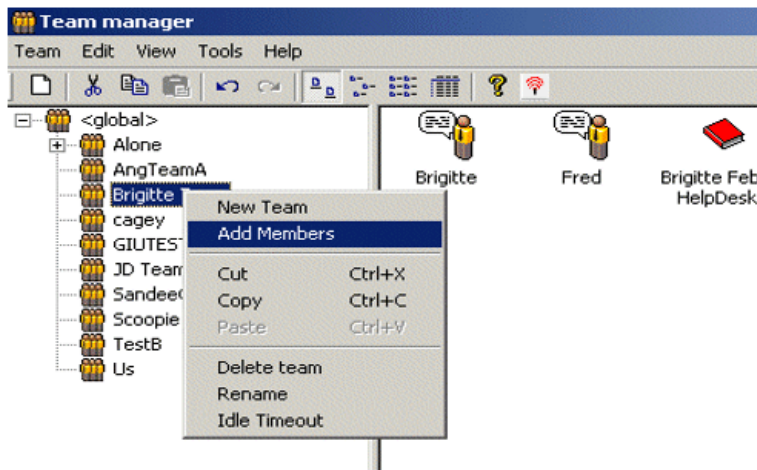
- In the **Add members** dialog select either *Operators*, *Campaigns*, *Callflow, Outbound Groups* or *Teams* to display all your existing agents, Outbound lists, callflows, Outbound groups or teams.

- Next, select the specific agents, Outbound lists, callflows or Outbound groups that you wish to add to the team and then click OK.
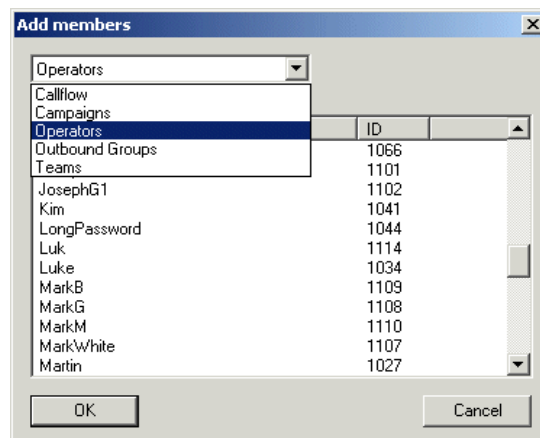
If you try to move a callflow without the corresponding Outbound list, a message dialog will open reminding you that you cannot move the callflow without the associated Outbound list.

Removing Agents and Campaigns from a Team

To remove specific agents, (callflows, Outbound lists and groups) from a team:

- Right click on the agent (callflows, O/B lists or groups) and select **Remove**.
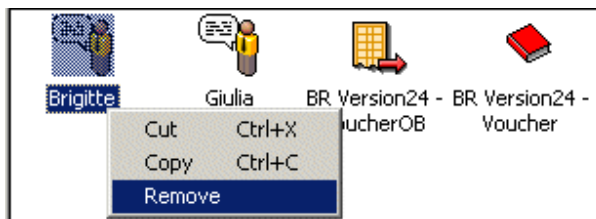
When removing an Outbound list, remember to select both the Outbound list and associated callflow.

If an agent (callflow, O/B list or group) that you wish to remove no longer belongs to any other team, they will automatically be moved back into the Global team.

Dynamic Team Changes

Historically, changes made to teams required an agent to logoff and logon again, to pick up the changes.

Customers now have the option to use the system as previously, i.e. setting up new teams assignments in advance of a new shift, which will take effect when agents re-login after a break, or to use the **BroadcastTeamsChanges** option to broadcast the changes instantly, so that agents can pick up any updates directly, without having to logoff and back on again.

To use the Broadcast Teams Changes option

- In the Synthesys main screen, click on *Teams* under the **Manage** heading.
- Select your team and make the required changes, moving users, callflows and outbound lists.
- To broadcast the changes instantly, click the **BroadcastTeamsChanges** icon on the toolbar.
- Agents can now pick up any changes immediately, without having to log off and back on again.
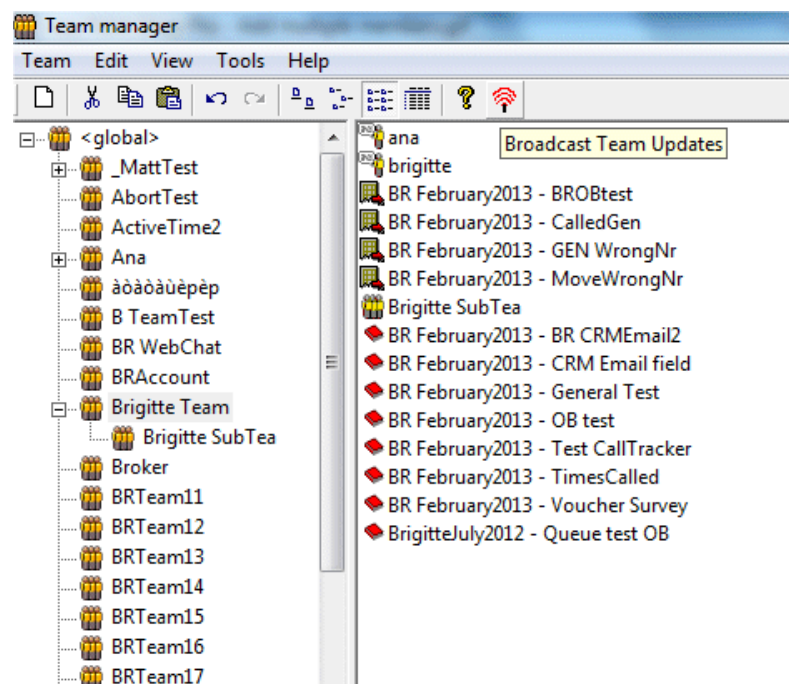
Locating Team Members

Team members can be located using the *List Teams* option on the **Tools** menu bar.

To establish of which team a particular *Operator, Outbound list, group, callflow or team* is a member:

- Select *List Teams* from the **Tools** menu, to open the *List Teams* dialog.

- Specify your search by selecting Operator (Callflow, Campaigns, Group or Teams) from the *Type* drop down menu.

- From the *Name* drop down menu, select the name of the Operator (callflow, Outbound list, group or team) that you wish to locate.

Our search shows that Ana (Operator) is a member of both, the *Global* and the *Marketing* team.
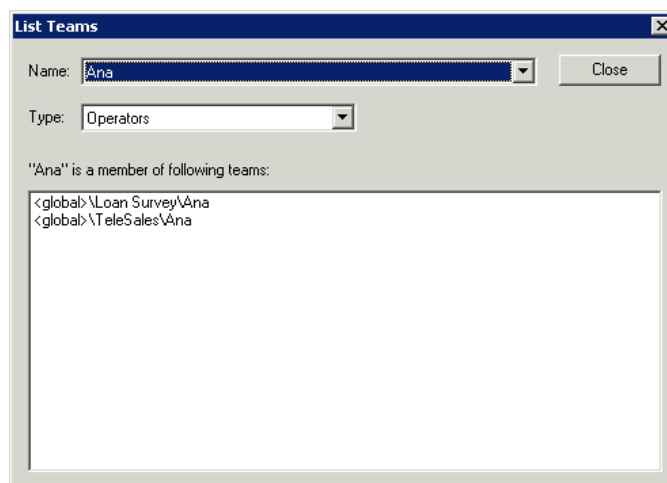
Idle Timeout

Idle Timeout is used to automatically pop records from *preview Outbound lists* to your agent's workstation, rather than agents having to click *Get Next Record* at run time.

*To improve functionality, we have removed the option from Teams, and instead you set up **Idle Timeout** in the **Advanced** Options page of your Outbound lists, adding, in seconds, the frequency for the next screen pop.*

*For more information please see the chapter Advanced Options for Outbound Lists, either in the Synthesys manual **Callflow Design and Outbound**, or in the Synthesys Core module **Synthesys Outbound Manager Basics**.*

If your system has not yet been upgraded to the latest Synthesys version, you can still activate the Idle Timeout function in the Team Manager:

- Right click on the team that contains the call lists that should automatically pop to the agents' workstation.

- The **Idle Timeout** by default is set to **Indefinite**, which means no automatic screen pop takes place.

- To enable automatic screen pops, specify the required time sequence, i.e. 00:15 seconds, to pop records from preview outbound lists to your agent workstation.

Using the Teams Menu Bar

New Teams can be set up, renamed and deleted and agents and campaigns can be added to individual Teams by using the *Pull Down Menus* on the *Menu Bar*.

Team Pull Down Menu

Option	Used To
New	Set up a new team.
Delete	Set up a new team.
Rename	Change the name of an existing team.
Exit	Close the Team Manager and to return to the Synthesys main screen.

Edit Pull Down Menu

Option	Used To
Undo & Redo	Undo or redo the last action.
Cut & Copy	Remove or copy the currently highlighted selection and place it on the Windows clipboard
Paste	Paste the contents of the Windows clipboard at the cursor /insertion point
Select All	Select all agents, Outbound lists, callflows, groups and teams within the Team.
Insert Selection	Deselect all selected agents, Outbound lists, callflows, groups and teams and select those that were not previously selected.

View Pull Down Menu

Option	Used To
Toolbar	Display or hide the toolbar. A 'tick' next the option indicates that the toolbar is visible.
Status bar	
Large/small Icons, List	Display agents, Outbound lists, callflows, groups and teams in large or small size icons or in a list format
Details	Display information such as name, type and description of agents, Outbound lists, callflows, groups and teams.
Arrange Icons	Sort icons by Name, Type, Description or User ID.
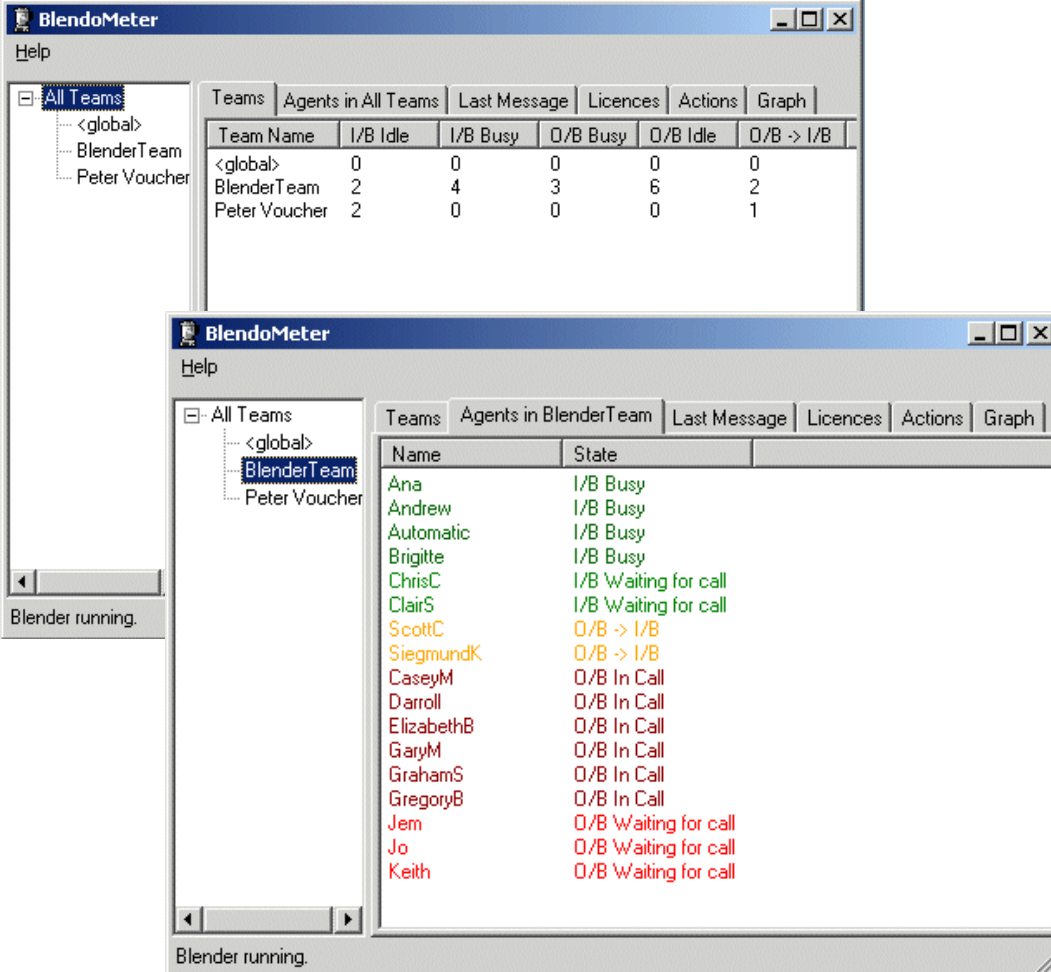
Tools Pull Down Menu

Option	Used To
List Teams	Locate the teams of which a specific *Operator, Outbound list, group, callflow or team* is a member.

Help Pull Down Menu

Option	Used To
About TeamMgr	Displays information about the version of the *Synthesys Team Manager* you are running.

The BlendoMeter

THE SYNTHESYS BLENDER

Introduction

The BlendoMeter is used to blend Inbound and Outbound calls. For each team created, you can decide how many agents should remain free to take Inbound calls using the *Free Agent Target* and *Priority* sliders. For example, for your 'Outbound Only' team, you may set your available *Agents Target* (free to take Inbound calls) down to 0, but keep a mixed team to a target of 2 available agents.

The Blender checks the call centre status every five seconds. It relies on the Predictive Dialler for all its information. If the Blender decides that a team has too many agents in 'I/B Waiting' state then it will move some of them to 'O/B Waiting' if there are enough free licences.

If the Blender decides that a team has too few agents in 'I/B Waiting', then it tries to find agents to move to Inbound. It first moves 'O/B Waiting' agents, so they become 'I/B Waiting'. If there aren't enough of these to achieve the target, it tells the PD to move **all** the other agents to Inbound after the current call. They all move to 'O/B -> I/B' state. This may result in too many agents in Inbound a little later, but this is not a problem since they will quickly be moved back into Outbound if necessary.

Once Call Blending has been configured, customers are not able to switch the BlendoMeter on and off. Blending is system wide and effects all Teams.

*With Blending installed, **ALL teams** will initially go to **'Inbound'** mode by default. **To enable Outbound calling**, users with access permission to the BlendoMeter must change this setting for each existing team, and for any new team that is subsequently created.*

The Blender ignores the Global Team, and only takes account of ONE team membership for each agent, so the teams need to be set up accordingly.

If rescheduled calls that are tied to an agent are due, the respective agents will be released for outbound so that they can make their callbacks.

Since the Blender must monitor when an agent is ready to take an Inbound call, it is necessary that the customer's CTI correctly keeps the PD informed when an agent logs off, makes a manual call, goes 'busy' on their extension or otherwise changes state. The Blender can only work effectively to the extent these functions are provided by CTI.

Call Blending is not a standard feature but needs to be purchased separately.

The Blendo Meter

To open the Synthesys *BlendoMeter*

- Go to **Manage** and select *Blending*, to open the *BlendoMeter.*

The left hand side of the BlendoMeter shows a tree view listing all teams set up in the Synthesys Team Manager. On the right, you can see the Teams, Agents in Teams, Last Message, Licences, Actions and Graph tabs with associated information.
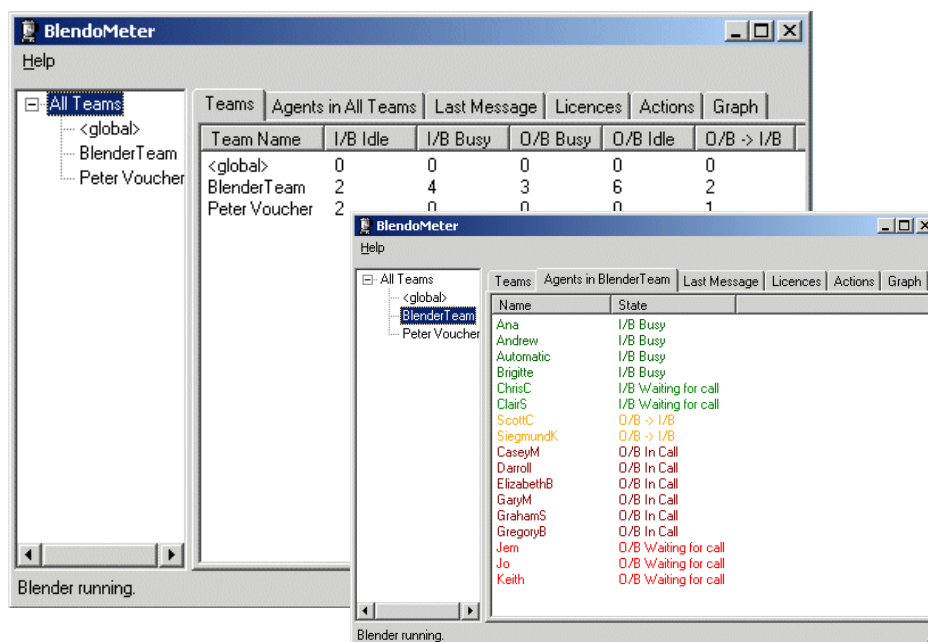
Option	Shows
Teams	All teams set up in the Synthesys Team Manager, with a count of the number of logged in agents in each different state per team, i.e. I/B Idle; I/B Busy; O/B Idle; O/B Busy; O/B-> I/B.
Agent in All Teams/ Agents in a selected Team	Detailed current agent state for the team selected on the left (which can be all teams or just one team).
Last Message	Snapshot of the decisions the Blender made the last time it ran. This is also logged in Blender.Details.Log on the server.
Licences	Summary of available Outbound licences and when they ran out (if ever). This is also logged in Blender.Licence.Log.
Actions	Summary of actions the Blender has made, such as moving agents to Inbound or Outbound.
Graph	Graph of the last hour's activity. If you move the mouse over the graph, a tool tip will give you a legend explaining the scale and the different lines. This information is also logged in the Phoenix_BlenderLog table.
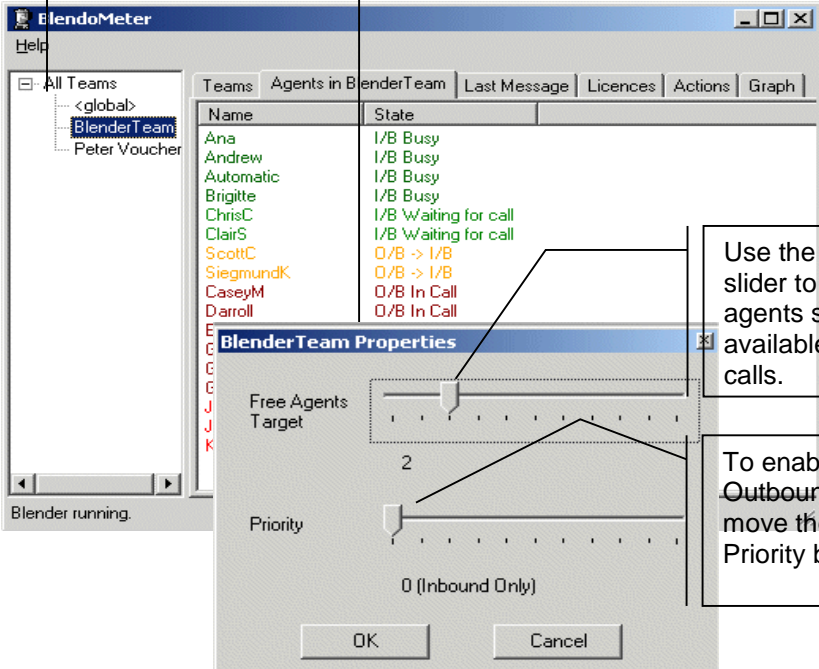
Enabling agents to take outbound calls

With Blending installed, **ALL teams** will initially go to '**Inbound'** mode by default. To enable Outbound calling, you must change this setting for each existing team and for any new team that is subsequently created, by using the **Free Agent Target** and **Priority** sliders in the *Blender Team Properties* page.

- Select and right click on the relevant team to open the *Blender Team Properties* dialog.

- There are two sliders available. A team defaults to *Free Agents Target=2* and *Priority=0 (Inbound Only)*.

Tree view, listing all Teams

BlenderTeam Properties
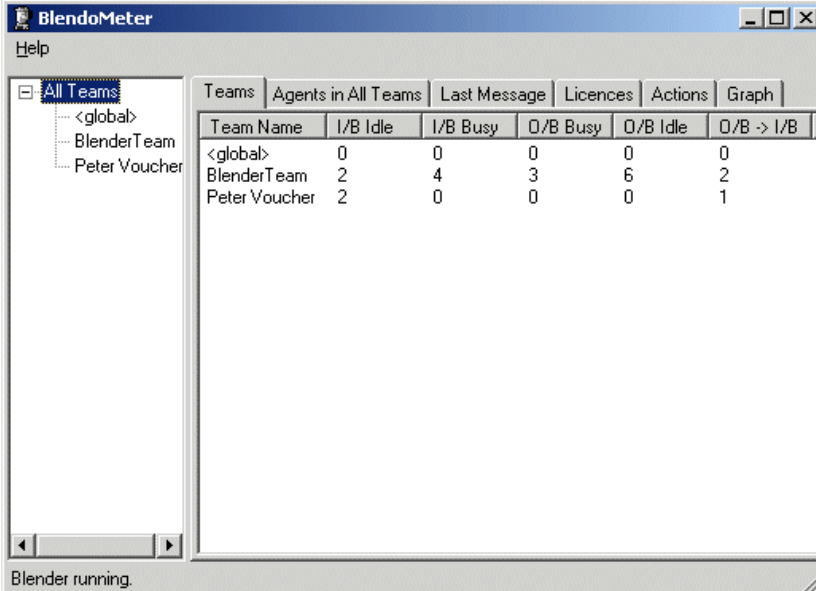
Use the **Free Agent Target** slider to determine how many agents should remain available to take Inbound calls.

To enable agents to take Outbound calls, you must move the slider to set the Priority between Priority 1-10.

- Move the **Free Agent Target** slider to specify the number of agents that should always remain available to take inbound calls, for the team selected.

- Move the slider to change the **Priority** setting from 0 (agents can take Inbound calls only) to a setting between Priority 1-10 (1 = Low Priority; 10 = High Priority). Higher priority teams take Outbound licences from lower priority teams. This applies specifically, if fewer Blender licences are used than Synthesys licences.

- Information about the Free Agent Target, Priority Setting and Team ID is stored in the database in Phoenix_BlenderSettings table.

Teams

The *Teams* option in the BlendoMeter shows a summary of all teams, with the number of agents in different states.

Option	Shows
Team Name	Names of the different teams set up in the Synthesys Team Manager.
I/B Idle	Number of agents free and waiting to take Inbound calls.
I/B Busy	Number of agents currently on an Inbound call.
O/B Busy	Number of agents currently on an Outbound call.
O/B Idle	Number of agents free and waiting to take Outbound calls.
O/B -> I/B	Outbound Transition: the number of agents about to be moved from Outbound to Inbound calls.

If agents log on they initially go to state 'I/B Idle', waiting for an Inbound call. If they get an Inbound call they are moved to state 'I/B Busy' and back, when the call is finished.

When outbound calling has been enabled the agent will go to O/B Waiting, when they get a call they are moved to state 'O/B Busy.'

If agents log off Synthesys they are disregarded and dropped from the BlendoMeter statistics.

Agents in Selected Team

The *Agents in selected Team* option lists the names of all agents for the team selected on the left (which can be all teams or just one team), and shows their current states.
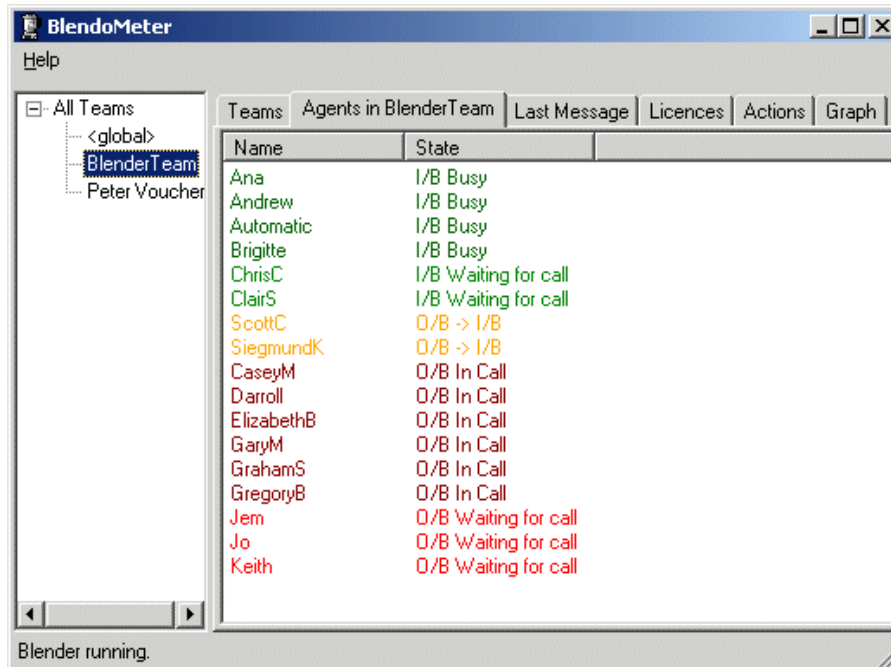
Option	Shows
Name	User names of all agents for the team selected on the left (which can be all teams or just one team).
State	Current state of the agent.

When the Predictive Dialler passes a call to the agent, the agent will go to 'O/B In Call' state.

If rescheduled calls that are tied to an agent are due, the respective agents will be released for outbound so that they can make their callbacks.

If agents log off Synthesys they are disregarded and dropped from the BlendoMeter statistics.

Last Message

The *Last Message* option shows a snapshot of the decisions the Blender has made the last time it ran. This is also logged in *Blender.Details.Log* on the server.

The information is useful for understanding why the Blender decided to carry out certain actions.
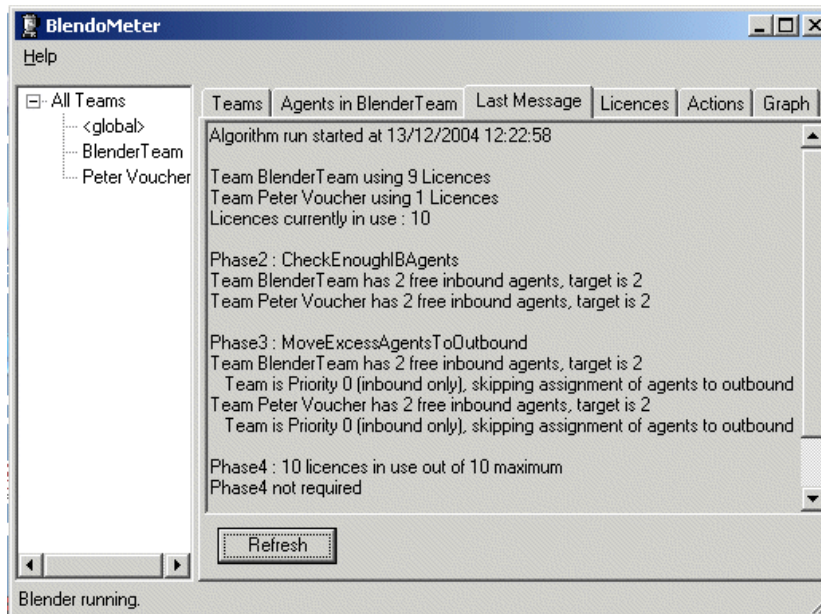
Click the *Refresh* button, to display the latest message update.

Licences

The *Licences* option provides a summary of available outbound licences and when they ran out (if ever). This is also logged in Blender.Licence.Log.
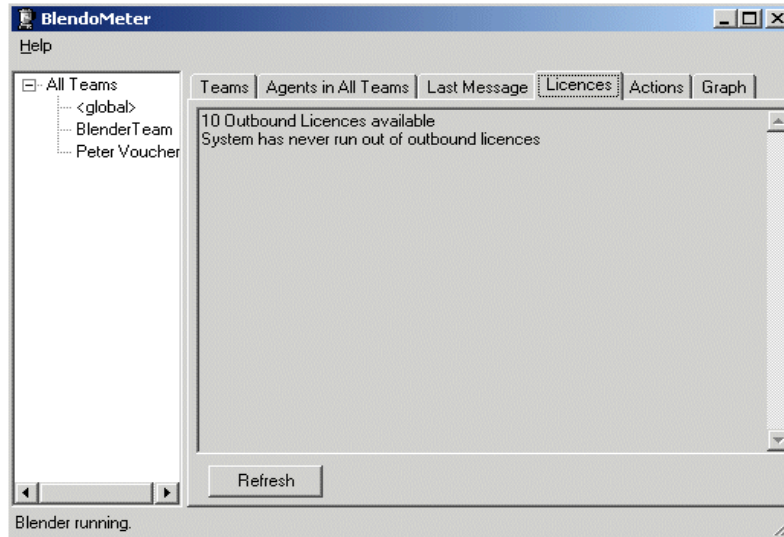
Click the **Refresh** button, to display the latest update.

Actions

The *Actions* option shows a summary of actions the Blender has taken, such as moving agents to Inbound or Outbound.
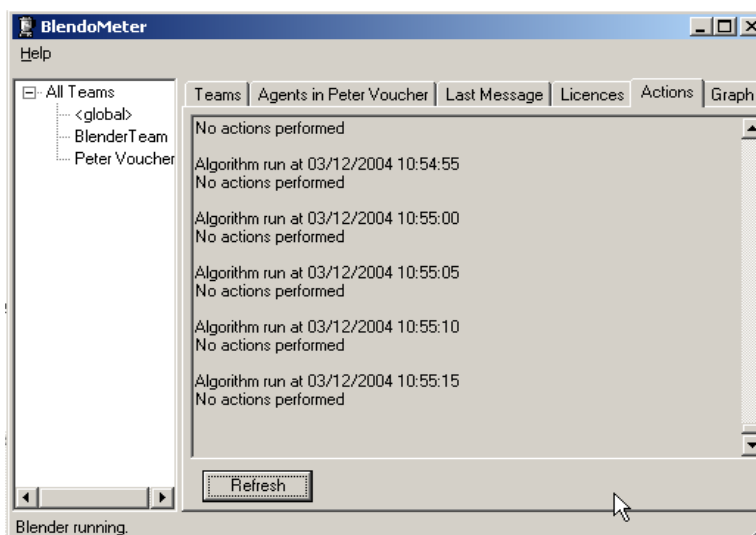
Click the Refresh button, to display the latest actions the Blender has taken.

Graph

The *Graph* option displays a graph of the last hour's activity.

If you move the mouse over the graph, a tool tip will give you a legend explaining the scale and the different lines.

This information is also logged in Phoenix_BlenderLog table.
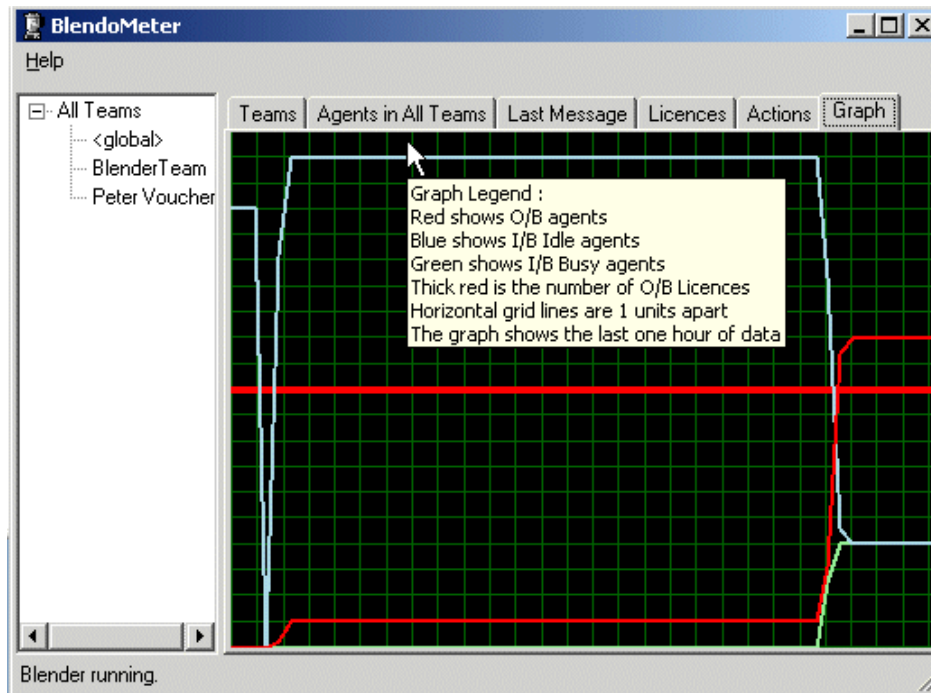
SYNTHESYS VOICE PLATFORM

Synthesys Switch Manager Inbound Strategies
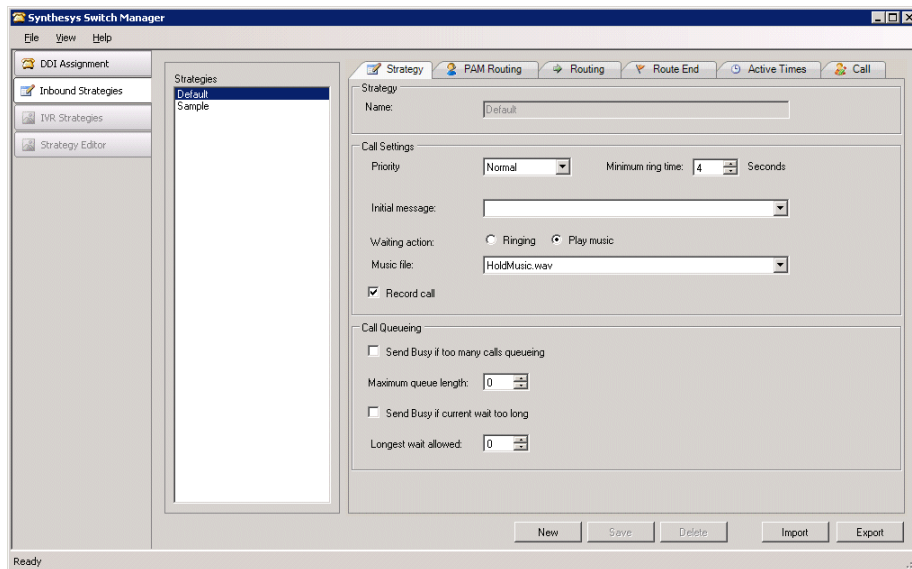
Synthesys Switch Manager IVR Strategies
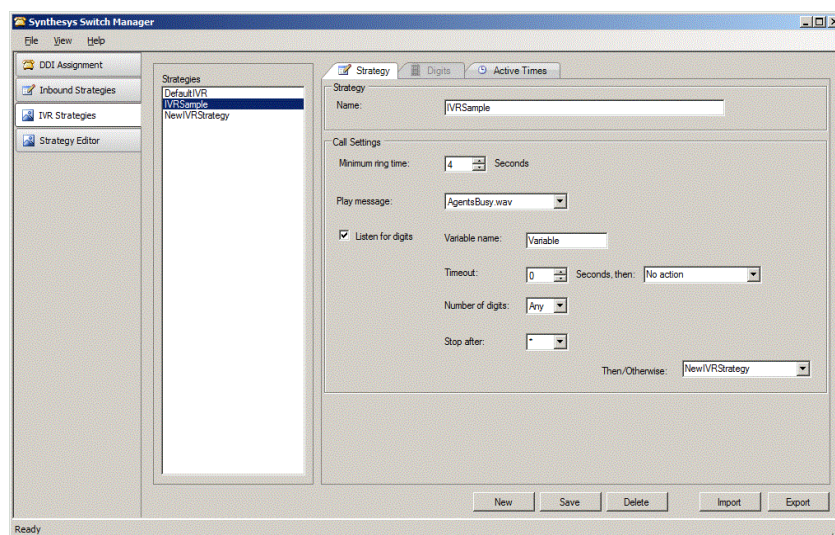
THE SYNTHESYS SWITCH MANAGER

Introduction

The **Synthesys Switch Manager** is opened via the **Manage** tab of the Synthesys workstation.

In the DDI Assignment dialog, users associate each incoming DDI with an Inbound or IVR strategy.

Inbound Strategies are used to define call settings and the queuing process. Users can set a minimum ring time before calls are answered, decide if a regulatory message or music should be played while callers are waiting and if the call should be recorded. For each stategy defined, users can then specify further details under the **PAM Routing, Routing,** **Route End,** **Active Times** and **Call** tabs**.**

IVR Strategies (Interactive voice response) allow you to define strategies for customer interaction using message requests and DTMF tones input via the telefone keypad to route the call to the appropriate agent.

As part of the IVR strategy users can define *Variables*, and associate single digit entries with specific Inbound or IVR strategies (1 for Customer service, 2 for Sales), which subsequently can be used in Callflow calculations and branching, and for reporting.

The Strategy Editor *can hold, if requested, more complex bespoke strategies designed in XML, to add extra functionality. Please contact your Noetica Account Manager for more information.*

All system messages are held in WAV files and can be customised per inbound campaign. If you need guidance to creating WAV files, please get in touch with Noetica and we can provide further information. (Document Reference NDID-33-72 : 'Recording Sound Files for the Synthesys Voice Platform')

All call details (successful or abandoned) are logged to a database for reporting on call centre performance.

Variables set up as part of IVR strategies can be used in Callflow calculations and branching to determine the flow of the conversation, and in reporting.

The Synthesys Voice Platform is not a standard feature but needs to be purchased separately.

DDI ASSIGNMENT

Using the **Synthesys Switch Manager,** users can configure the Inbound and IVR strategies that are to be associated with each incoming DDI.

IVR and Inbound strategies are assigned to DDI numbers in the **DDI Assignment** dialog**.**

- Enter the DDI number into the **DDI** field at the bottom of the dialog.

- Select the desired strategy from the **Strategy** drop down menu.

- Click the **Add** button now enabled, to display the DDI and associated strategy in the **DDI** and **Strategy** columns of the *Assign strategies to DDI below* section.

- To update information, click the Refresh button on the right of DDI and Strategy columns.

DDI Assignment – to associate DDI with Inbound strategy

Inbound Strategies - to configure the Inbound strategy to be used

IVR Strategies - to configure the IIVR strategies to be used

Strategy Editor – advanced strategies configured by Noetica

Refresh – to update strategy assignments
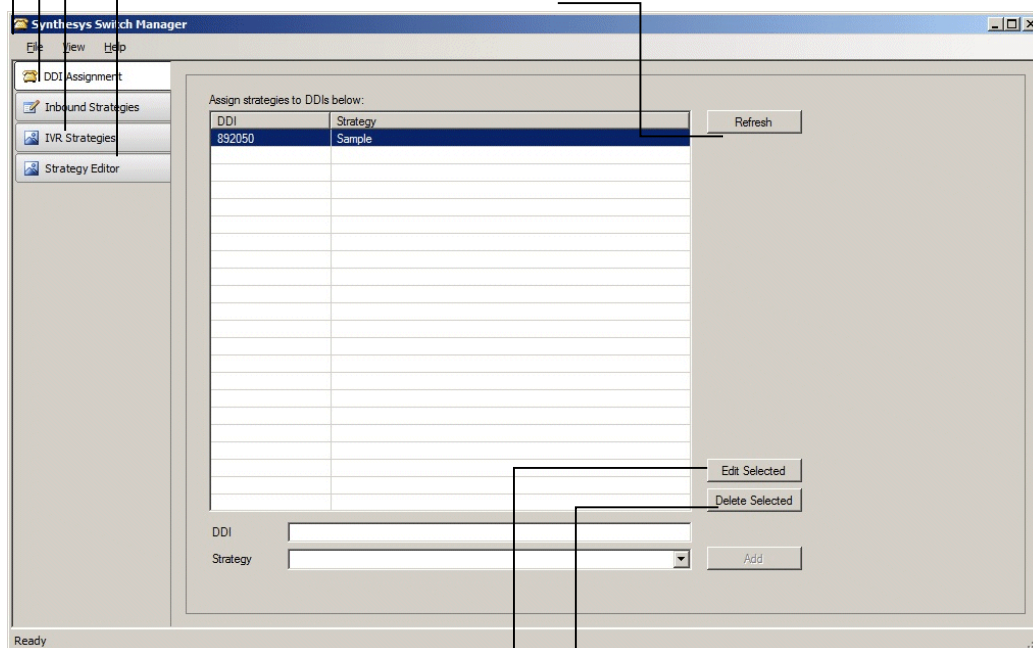
Edit Selected – to modify the currently selected strategy
Delete Selected - to remove the currently selected strategy

The next pages will describe how you can configure new Inbound and IVR strategies.

INBOUND STRATEGIES

Strategy

To configure the Inbound Strategy, specifying the **Call Settings** to be applied for each call:

- Create a new Inbound strategy clicking the **New** button at the bottom of the Strategy screen, and type a name for the strategy into the *Name* field.

- Select a *Priority* of Low, Normal, High or Urgent to determine which calls from the available strategies should be presented to available agents first.

- Select, in seconds the ***Minimum ring time*** before the call is answered.

- Select an ***Initial message*** (Wav file)**,** if one is to be played before a caller joins the queue (e.g. *your call may be recorded for training purposes*).
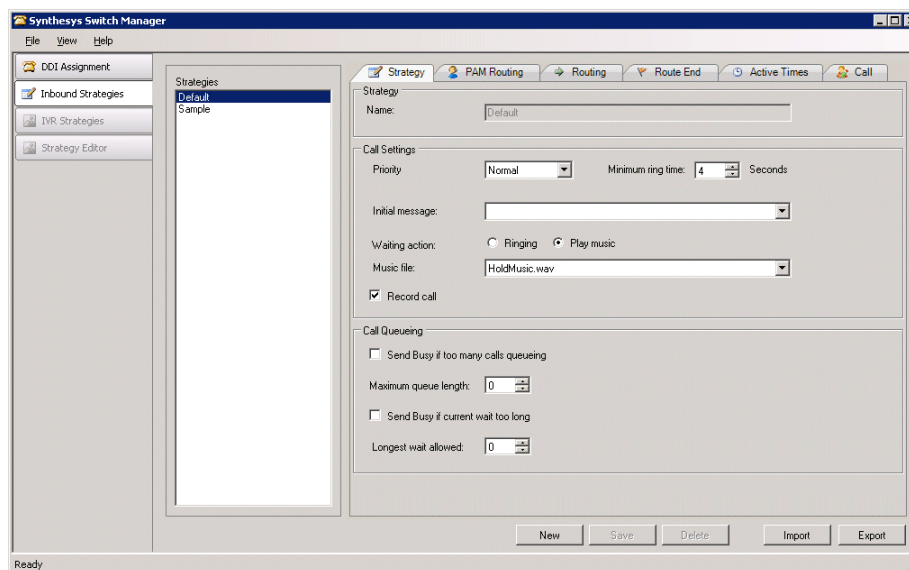
- Specify the *Waiting action*, i.e. ***Ringing*** for the caller to hear a ringing tone while waiting, or ***Play music*** and select a WAV file, to play music.

- Tick the ***Record call*** option, if the call is to be recorded.

You can also configure details for the **Call Queuing** process:

- Tick ***Send Busy if too many calls queuing*** and as **Maximum queue length,** enter the maximum number of callers allowed in the queue. If the limit set is exceeded any new caller will hear a busy signal.

- Tick ***Send Busy if current wait too long*** and enter, in seconds, the **Longest wait allowed,** to send a busy signal to any new caller, if the waiting time for any caller in the queue exceeds the limit set.

Use the *Import* and *Export* buttons to import or export Inbound strategies as xml files.

PAM Routing

PAM (Personal Account Manager) routing allows for customers to be routed to preferred agents or teams, depending on successful CLI recognition.

To enable PAM routing you initially need to use call scripting to add an AGENTS and/or TEAMS field to the relevant CRM, and then use CRM imports, to populate these fields with a comma separated list of Agent Ids and Team Ids.

In the *Synthesys Inbound Strategies* page, under the PAM Routing tab you then:

- Tick the **Use PAM** option and enter the relevant **CRM Prefix**.

- Based on the incoming caller's number, PAM will search for the matching customer record, using the CRM prefix specified.

- If there is an AGENTS field containing Agent IDs, and one of the agents is available, the call will be passed to that agent. If there is a TEAMS field containing a list of Team IDs, the call will be passed to one of the available agents in that team.

- If no Teams or Agents options are available routing continues as normal.
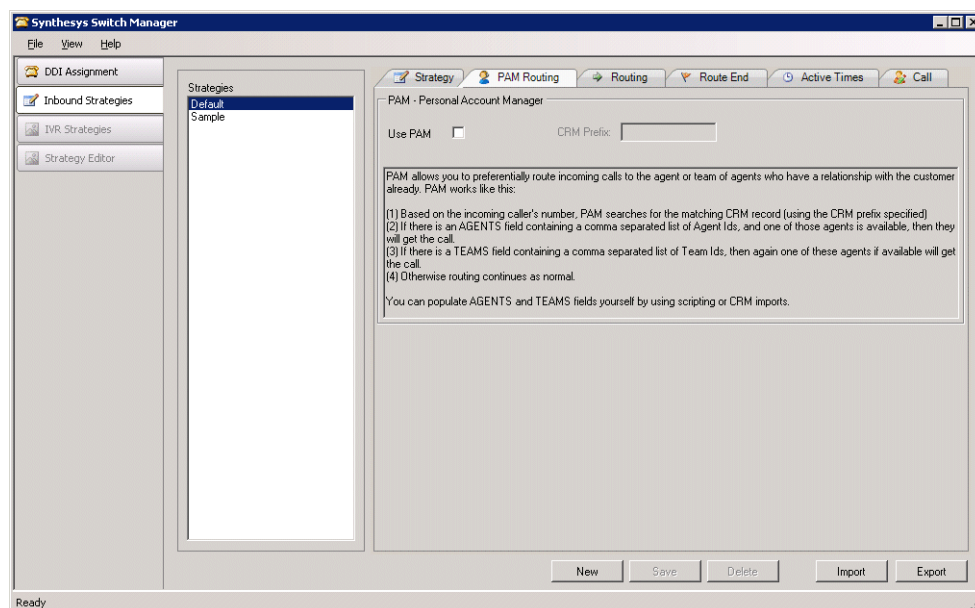
Routing

Under the Routing option, users can assign teams and specify how to deal with a call, if it hasn't been answered within a given time:

- Use the **Primary Teams/ Available Teams** option to assign a list of Primary Teams to each strategy.

- If the call isn't answered in a configurable time (**Time before including further teams**), the call can be routed to **Secondary Teams**, if they have been specified.

- A **Message** (Wav file) can be played while the caller is waiting in the queue.

- If the call isn't answered in a configurable time (**Time before including additional teams**), the call can be routed to further **Teams**, if they have been specified.

- A **Message** (Wav file) can be played while the caller is waiting to be put through to an agent.
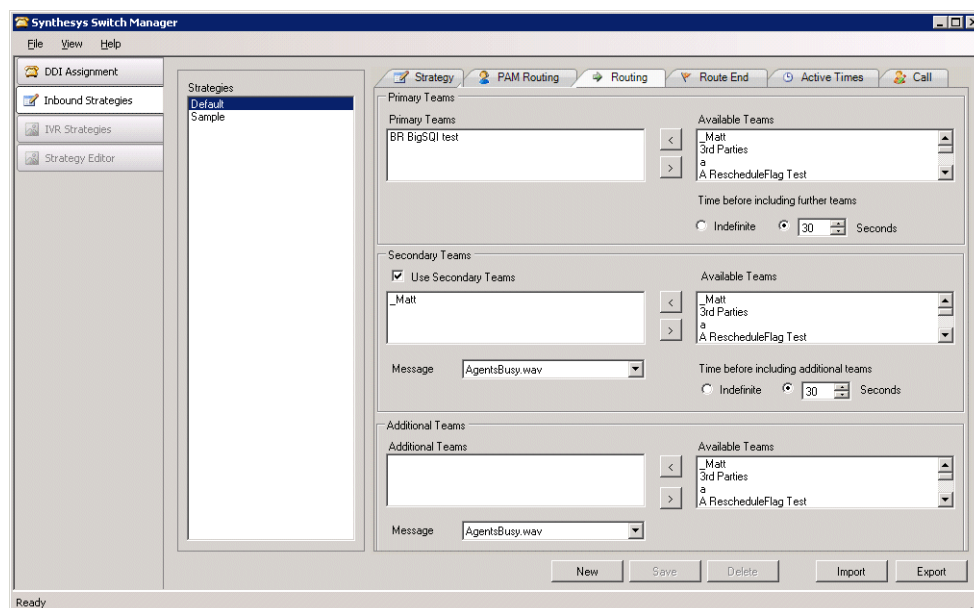
The number of inbound calls that can be queued is only limited by the number of lines configured on the system.

If multiple teams have been set up, all teams will be searched to locate an available agent.

The longest waiting call is answered first, and is given to the longest waiting agent who is in the correct teams and not on wrap.

Route End

Under the *Route End* tab you decide details for abandoning or diverting inbound calls.

- Users can specify, in seconds, the **Time before abandoning queue.**

- In the **Play Message** field you can select a message (Wav file), if one is to be played before the call is either dropped or diverted.

- To drop the call, select **Drop Call.**

- To redirect a call to an external number, select **External divert to** and enter the telephone number (with full DDI) for the external transfer.
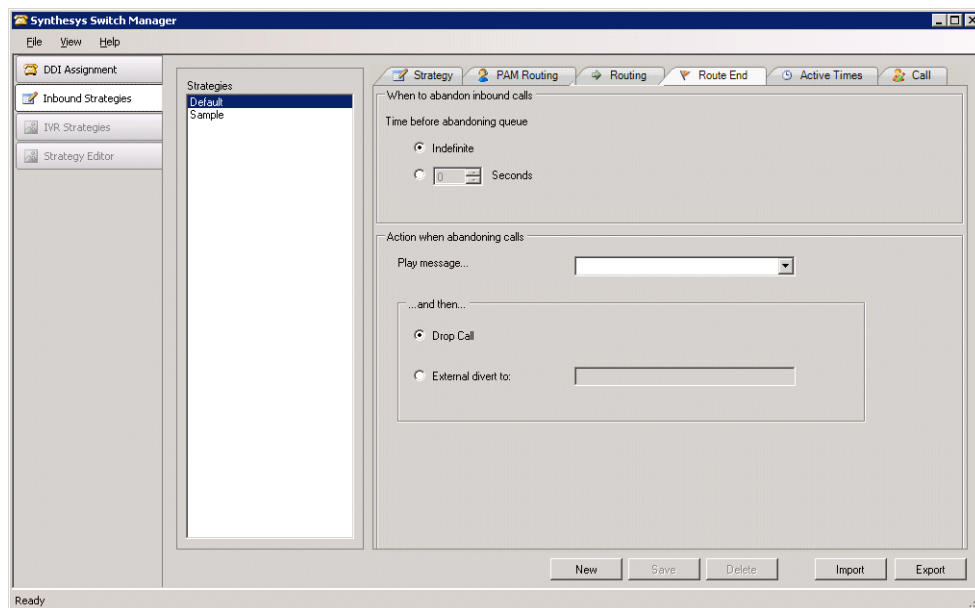
Active Times

Under **Active Times**, users can specify the opening hours during which the Inbound strategy will be used and select an Out of hours message.

When abandoning calls, you can specify an required action, i.e. to play a message, and then either drop or divert the call.

- Configure the opening hours weekdays, Saturday and Sunday, as required.

- In the **Play Message** field you can select the message (Wav file) to be played when the offices are closed. If no message is selected callers will hear a busy tone.

- To drop the call, select **Drop Call.**

- To redirect a call to an external number, select **External divert to** and enter the telephone number (with full DDI) for the external transfer.
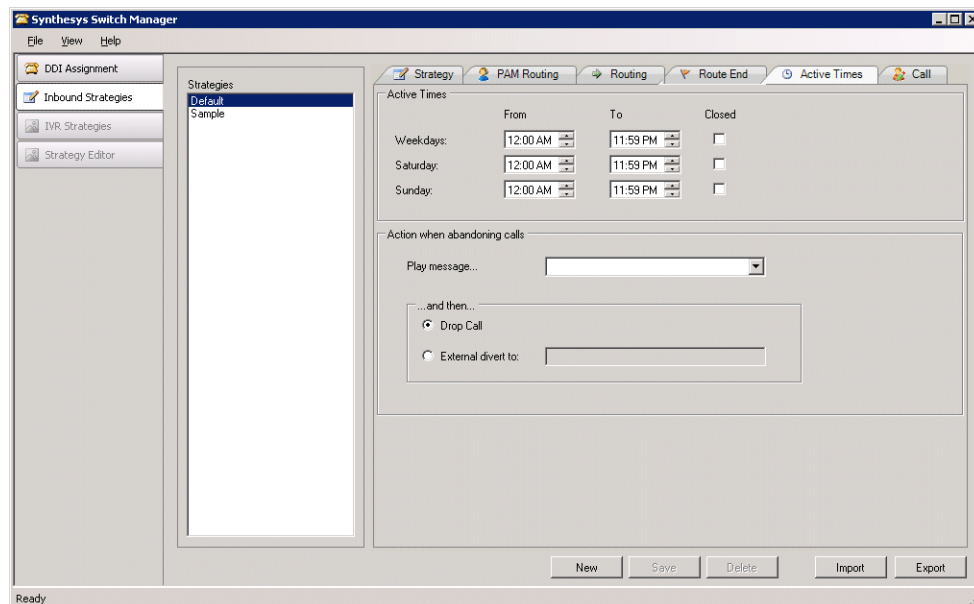
Call

Use the **Call** tab to specify the number of rings that will sound after the call has been passed to the agent, to notify the agent of an incoming call. You can also decide to play music while the caller is waiting in the queue.

- In the *Answering* section, enter or select the **Number of Rings** before the call is answered.

- In the *Wrap Up* section enter or select, in seconds, the *Agent wrap-up time* to be used.

- In the **Music on Hold** section users can select a Wav file to be played when the caller is put on hold by the agent, after the call has been transferred.
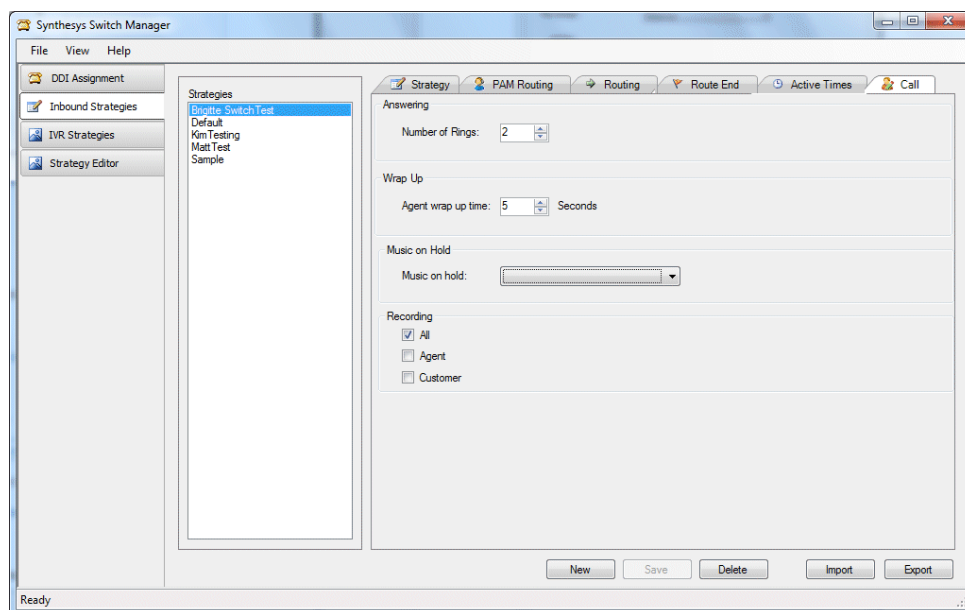
Under **Recording,** you can either tick all options, or select any option(s) as required.

- Tick **All,** if you wish to record the conversation of both the agent and the customer.

- Tick **Agent** if you wish to create a recording file for the conversation of the agent.

- Tick **Customer** if you wish to create a recording file for the conversation of the customer.

IVR STRATEGIES

Strategy

To configure IVR Strategies to deal with response requests that require callers to enter digits on the telephone keypad

- Type a name for the new Strategy into the *Name* field.

- Enter or select, in seconds, the *Minimum ring time* before the call is answered.

- Select the message to be played from the **Play message** drop down list.
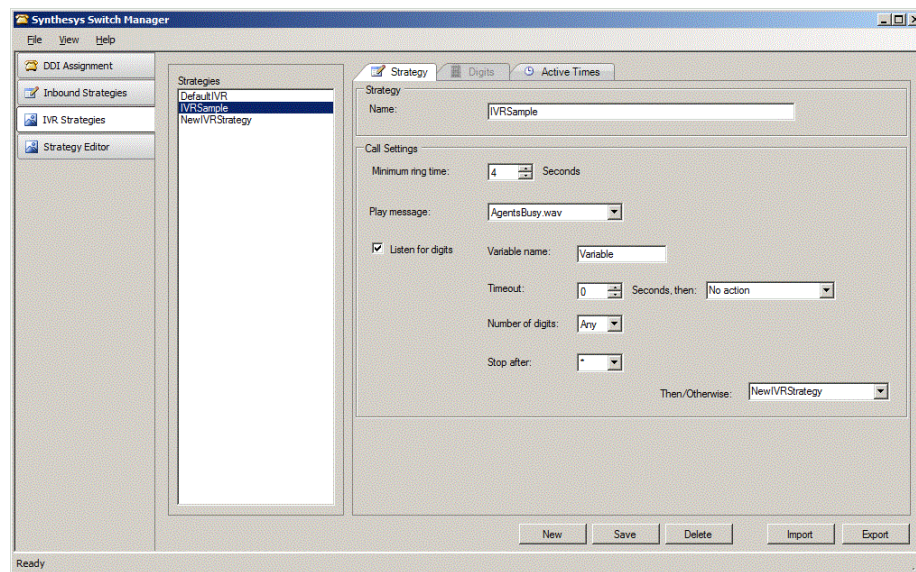
Tick **Listen for digits** if you wish to specify Variable settings:

- Enter a name for your variable into the **Variable names** field.

- In the **Timeout** field, enter the number of seconds the system will wait for a response, after which the selected **Timeout Action** is activated.

- If the digits to be entered on the telephone keypad are of a fixed length, specify the **Number of digits.** If there is no match, the selected **Timeout Action** will be activated. If the digits required are entered or if no timeout action has been selected, then the action selected in the **Then/ Otherwise** field will be activated.

- If the digits to be entered are of variable length, specify a **Stop after** point, i.e. a # tag, after which the selected **Inbound or IVR strategy** will be activated.

To associate single digit entries with specific Inbound or IVR strategies, enter **1** into the *Number of digits* field. Please see the next page for a list of available actions and **Digits** information.

Digits

The *Digits* tab is enabled if the response requested from a caller requires a single digit entry on the telephone keypad and if a **1** has been entered into the *Number of digit* **field** in the IVR Strategy page.

Each DTMF digit can be associated with a specific Inbound or IVR strategy. This way callers can be routed to the next logical IVR or Inbound strategy, or action, depending on the option requested when pressing a digit on the telephone keypad, for example, 1 for Customer Service; 2 for Sales.

To associate the **DTMF Digit** with an action in the **Branch to** column

- Click into the **Branch to** column, and from the drop down menu subsequently displayed, select the required action.

- If no action is selected for the DTMF digit, then the action selected in the **Then/ Otherwise** field under the Strategy tab will be activated.
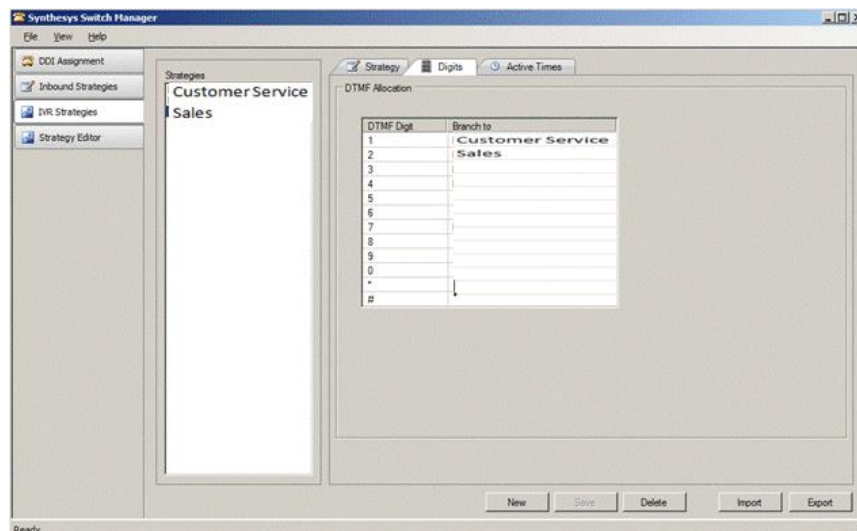

Action	Used to
Inbound Strategy	Start the selected Inbound strategy
IVR Strategy	Start the selected IVR strategy
Repeat Recording	Play the previously played recording again
Hang Up	Hang up the call
No Action	Hang up the call

Active Times

Under **Active Times**, users can select the opening hours during which the IVR strategy will be used and select an Out of hours message.

- Configure the opening hours weekdays, Saturday and Sunday, as required.

- Select the message to be played when the offices are closed. If no message is selected callers will hear a busy tone.
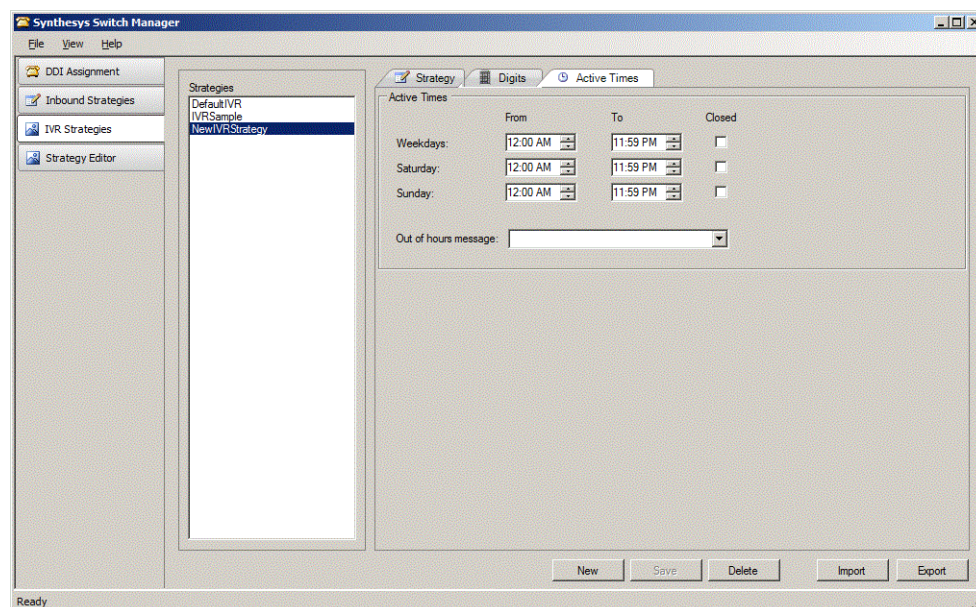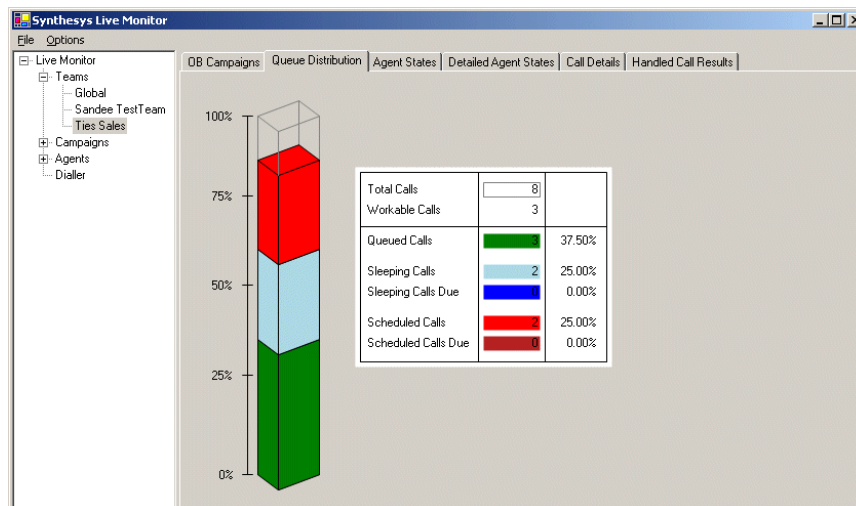

THE STRATEGY EDITOR
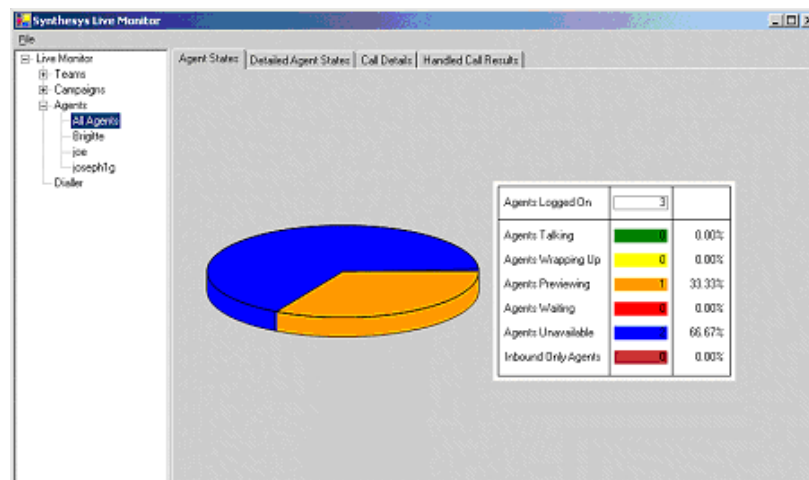
The Strategy Editor can hold, if requested, more complex bespoke strategies designed in XML, to add extra functionality. Please contact your Noetica Account Manager for more information.

SYNTHESYS LIVE MONITOR

Queue Distribution

Agent State

SYNTHESYS LIVE MONITOR

Introduction

The core function of the *Synthesys Live Monitor* is to provide *real-time* information of call centre activities for call centre supervisors and managers.

You can view the current state of all live campaigns that are running and observe individual agent activity within your call centre in real-time.

Detailed data statistics are displayed for the individual teams, campaigns, Outbound lists and Outbound groups, agents and the dialler, with information about Queue distribution, Agent State, Handled Call Results and Dialler Results being visually represented in graphs.

The data shown includes, for example, the average agent talk time and you can see how long an agent takes on a particular section of a callflow. This allows you to identify problem areas or congestion points within a callflow, which can be refined in the Campaign editor, to improved performance.

The performance monitor works on the .net framework, and additional software may need to be installed before the monitor will work correctly.
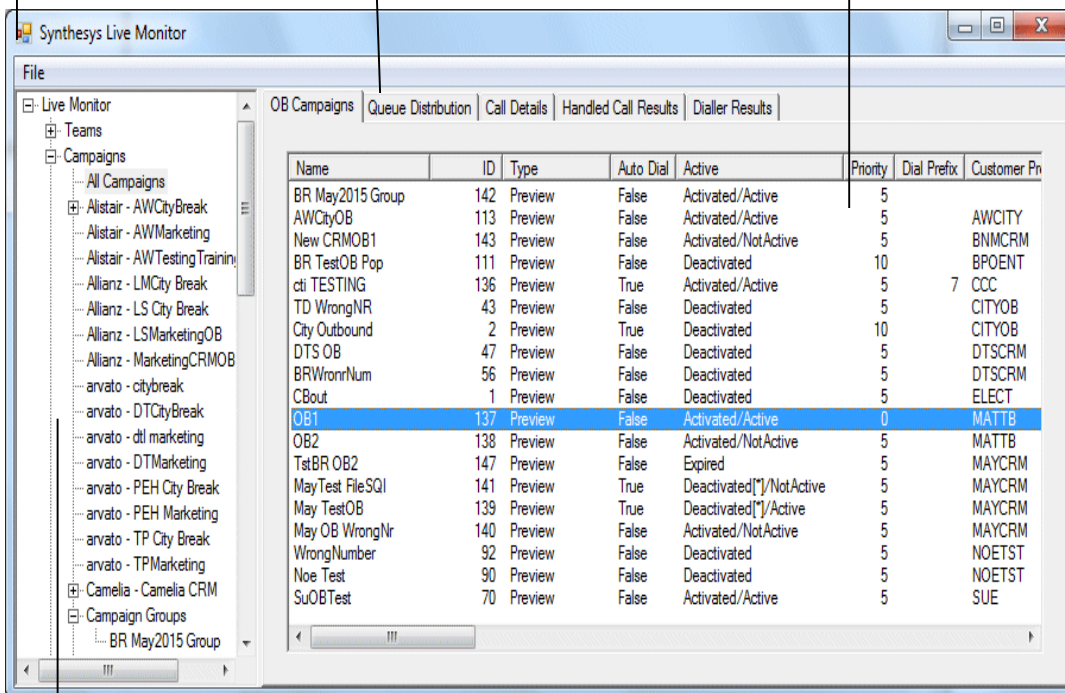
The Synthesys Live Monitor Main Screen

To open the Live Monitor:

- Click on *Live Monitor* under the **Monitor** heading in the Synthesys main screen.

Using the Live Monitor, you can view the current state of all live campaigns that are running and observe individual agent activity within your call centre in real-time.

Menu Bar   Tab Options   Data Statistics

Live Monitor Directory

Live Monitor Directory

The *Synthesys Live Monitor Directory* shows a tree structure. Using the category headings *Teams, Campaigns, Agents, Dialler* and *Licensing*, detailed data statistics can be displayed for the individual teams; campaigns, outbound lists/ outbound groups, agents and the dialler and licensing arrangements can be viewed.

To display the available options:

- Click on the ⊞ sign next to the Live Monitor caption.

- Click on the ⊞ sign next to Teams and Campaigns respectively, to display a list of all teams and campaigns, including the Outbound lists and outbound groups set up on the Synthesys system.

- Click on the ⊞ sign next to Agents, to display all agents currently logged on to Synthesys and in the *Start Work* screen.

- Select Dialler, to view dialler statistics.

- Select Licensing, to view the current Synthesys and Predictive Dialler licensing arrangements.

Selecting the individual team, campaign, outbound list, outbound group or agent, you can view the corresponding detailed data statistics.

Available Tab Options

The Live Monitor displays detailed data statistics for the individual Teams, Campaigns, Outbound lists, Outbound groups, Agents and the Dialler.

Option	Displays:
OB Campaigns	Detailed statistics for Outbound lists. This option is available on Team and Campaign level.
Queue Distribution	A graph showing queue details. This option is available on Team, Campaign and Outbound list/ Campaign group level.
Agent States	A graph representing the different Agent States. This option is available on Team, individual Campaign & Outbound list/ Campaign group and 'All Agents' level.
Detailed Agent States	Real time statistics for all agents. This option is available on Team, individual Campaign & Outbound list/ Campaign group and 'All Agents' level.
Call Details	Shows detailed call statistics of all calls completed in the current user session. This option is available on Team, Campaign, Outbound list/ Campaign group and Agent level.
Current Call Details	Shows Customer details of the call in progress. Supervisors can follow the advancement of the call, with section names and time spent in each section displayed and supervisors can view history events associated with a customer.
Handled Call Results	A graph showing all Handled calls in 'real time', including the Call Results. This option is available on Team, Campaign, Outbound list/ Campaign group and Agent level.
Dialler Results	A graph showing dialler result details. The option is available on Campaign and Outbound list/ Campaign group level.
Factor details	Displays the factor details, i.e. the value used to calculate how many calls to dial on a predictive campaign. This option is available on Outbound list/ Campaign group level.
Group Summary	Detailed statistics for Outbound groups. This option is available on Campaigns Group level, located under the Campaigns level, as part of the All campaigns options.
CTI Details	Displays details of the Predictive Dialler and the Switch. This option is available on the Dialler level
Licensing	View current Synthesys and PD licensing arrangements. This option is available on the Licensing level.

Terminology

Term	Definition
Talking	Refers to agents taking calls, with the 'talking' state starting as soon as the telephone becomes unavailable, for example, when agents press the dial button or even just take the phone of the hook.
Talk Time	The time when the agent starts the 'talking' state, or is actually connected on the phone and still in the script. (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP)
Previewing	Starts when the agent is in the script BEFORE entering the 'talking' state or being connected.
Connected	The term connected refers to the point when the Synthesys CTI interface receives a notification from the switch that the agent is no longer available. There may be a variation of up to 1 second between the call being connected and the Synthesys CTI interface being notified by the telephone switch.
Wrapping	Starts when an agent is no longer both on the phone and in a script following a dial, regardless of whether or not the dial results in a connected call.
Wrap Time	Starts when the agent enters the 'wrapping state' plus any switch wrap up time (set in the inf file Default 2 seconds).
Idle Time	The time between an agent ending wrap up state and getting the next screen pop (except for the first call of the day, where it is from the log in to the first screen pop.

OB Campaigns and Campaign Group Options

The *OB Campaigns Option* is available on Team and Campaign level and shows detailed statistics of your Outbound lists and Outbound groups.

Option	Displays:
Name	The names of the Outbound lists/ OB groups.
ID	The Outbound list/ OB group ID's.
Type	Type of Outbound list/ OB group: 'Preview or Predictive'.
Auto Dial	True or False, depending if Auto Dial is activated or not.
Active	**Activated/ Active** = the OB list is activated and on active times; **Activated/ Not Active** = the OB list is activated but outside of its active times; **Deactivated** = the OB list is deactivated; **Deactivated[*]/Active** = the OB list is deactivated, but on active times in at least one OB Group using Group settings (i.e. 'Use Campaign State' is NOT ticked); **Deactivated[*]/Not Active** = the OB list is deactivated and outside of its active times in at least one OB Group using Group settings (i.e. 'Use Campaign State' is NOT ticked); **Expired =** the OB campaign has expired, i.e. it is past the end date specified using the Campaign Expires option.
Priority	The priority rating of the Outbound list/ OB group: Low = 0; High = 10
Dial Prefix	The initial number (i.e.'9') used to dial out.
Customer Prefix	The customer prefix of the CRM.
Idle Agents	The number of agents waiting' in 'Start Work' without currently taking calls.
Expected Free Agents	The number of agents that the dialler expects to be free within the average connect time for the campaign.
Unavailable Agents	The number of agents in 'Start Work', but currently not available to make or take calls (i.e. 'On Break').
Previewing Agents	The number of agents previewing calls.
Talking Agents	The number of agents in the taking state, with 'talking' starting as soon as the telephone becomes unavailable, i.e. agents press the dial button or begin to dial, or even just take the phone of the hook.
Wrapping Agents	The number of agents in the process of completing calls, from clicking OK in the conclusion window of a Callflow to hanging up the phone, or from hanging up the phone to clicking OK in the conclusion window of a Callflow.

Total Agents	The total number of agents available to take calls.
Avg Idle Time	The average time an agent is waiting in 'Start Work' without being in the talking state, in any one session.
Queued Calls	The total number of calls queued in the Outbound Manager.
Sleeping Calls Due	The total number of sleeping calls due to be taken.
Rescheduled Calls Due	The total number of rescheduled calls due to be taken.
Calls in Hopper	The total number of calls in the Dialler cache.
Total Calls Worked	A count of predictive dials, plus preview records handed to agents.
Calls To Make	The total number of predictive calls that the Dialler has calculated it needs to make for an Outbound list/ OB group.
Calls Requested	The actual number of calls the dialler requests the CTI layer to make.
Max NC Rate	The maximum nuisance % rate acceptable for predictive Outbound list/ OB group.
Current NC Rate	The current nuisance % rate for the predictive Outbound list/ OB group .
Current SR	The current success rate (SR) in percent (%) of calls that are given to the agents.
Avg Connect	The average time it takes for predictive dialled calls to be connected.
Trunks Allocated	The number of lines allocated for predictive dialling.
Next Start Time	The next time the campaign becomes live based on the active time settings in the Synthesys Outbound Manager.
Next End Time	The next time the campaign is due to finish based on the active time settings in the Synthesys Outbound Manager.
Estimated Time left	The estimated time the campaign runs out of call data, based on the number of records still to be worked, the number of agents and the average duration of the calls.
Weight	Weighting set for the Outbound groups to determine the number of calls to be taken from a selected Outbound list within a group, before moving to the next.

Detailed Agent States Option

This option is available on Team, individual Campaign, Outbound list, Campaign group and 'All Agent' level and shows real time statistics for all agents.

Option	Displays:
User Name	The name used to log on to Synthesys.
Agent ID	The agent's ID, as allocated in Synthesys Personnel.
First Name	The agent's first name, as entered in Synthesys Personnel.
Last Name	The agent's surname, as entered in Synthesys Personnel.
Machine	The name of the workstation.
Switch	The name of the switch / PBX used.
Extension	The extension number for the workstation.
Status	The current status of the agent, i.e. 'Waiting' 'Previewing' etc.
Detailed Status	The current agent state ('Available'; 'Unavailable – Break') or the agent's progress within a campaign, showing the campaign and current section name, or 'Wrap-up' once the agent has reached the conclusion window.
Time in State	How long agents have been in the current Status.
OB Campaign	The name of the Outbound list currently allocated to the agent.
Handled Calls	All calls that the agent has taken. Aborted I/B calls are displayed as completed calls, aborted O/B calls show the selected aborted type.
Finished Calls	All Inbound and Outbound calls that an agent has completed, but NOT the aborted O/B calls.
Time Logged On	The time an agent has logged on and accessed 'Start Work'.
Total Talk Time	The length of time an agent is both, connected on the phone and in a Synthesys Callflow.
Avg Talk Time	The average length of time the agent is connected on the phone and in a Synthesys Callflow (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP).
Total Wrap-up Time	The total time when an agent is not both on the phone and in a script following a dial, whether the dial results in a connected call or not, plus any switch wrap up time.

Detailed Agent States continued

Avg Wrap-up Time	The average time when an agent is <u>not</u> both on the phone and in a script following a dial, whether the dial results in a connected call or not, plus any switch wrap up time.
Total Idle Time	The total time between an agent ending wrap up status and getting the next screen pop.
Avg Idle Time	The average 'Idle Time' between an agent ending wrap up status and getting the next screen pop in any one session.
Total Preview Time	The total time an agent is in a Synthesys callflow BEFORE the call is connected.
Avg Preview Time	In average length of time an agent is in a Synthesys callflow BEFORE the call is connected.
Total Unavailable Time	The total time of an agent being unavailable to take calls in any one session.
Avg Unavailable Time	The average time of an agent being unavailable to take calls in any one session.

Call Details

This option is available on Team, Campaign, Outbound list, Campaign group and Agent level and shows call statistics of all calls completed in the current user session.

Option	Displays:
User Name	The name of the user logged into Synthesys.
Sequence ID	The unique ID for the completed call in the current user session.
Customer ID	The Customer ID (CRM Prefix) of the completed call.
Call Type	'Inbound' or Outbound', depending on whether it was an Inbound or Outbound list.
Call Result	The outcome of the call. Finished calls display the Call Results, as set up in the conclusion flags in the Callflow Editor; aborted calls show the aborted type, i.e Rescheduled; Phone engaged; etc.
Campaign	The name of the campaign.
OB Campaign	The name of the Outbound list.
Queue ID	The Queue ID of an Outbound list (or IB for an Inbound call).
Time Started	The date and time the call started.
Time Finished	The date and time the call finished.
Preview Time	The length of time an agent was in a Synthesys callflow BEFORE the call was connected.
Talk Time	The time the agent was in the talking state and in the Synthesys Callflow. (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP)
Wrap Time	The time when an agent spent <u>not</u> both on the phone and in a script following a dial whether the dial results in a connected call or not, plus any switch wrap up time (set in the inf file Default 2 seconds).
Total Time	The total time it took the agent to take a call, from the time of the Callflow pop, including preview time, dialling, talk time and wrap-up time, to the point at which the agent was available again to take the next call.
Idle Time	The time spent between the agent ending the wrap up state and getting the next screen pop (on the first call of the day from login until the first screen pop.

Queue Distribution

This option is available on Team, Campaign, Outbound list and Campaign group level, displaying a graph showing queue details.
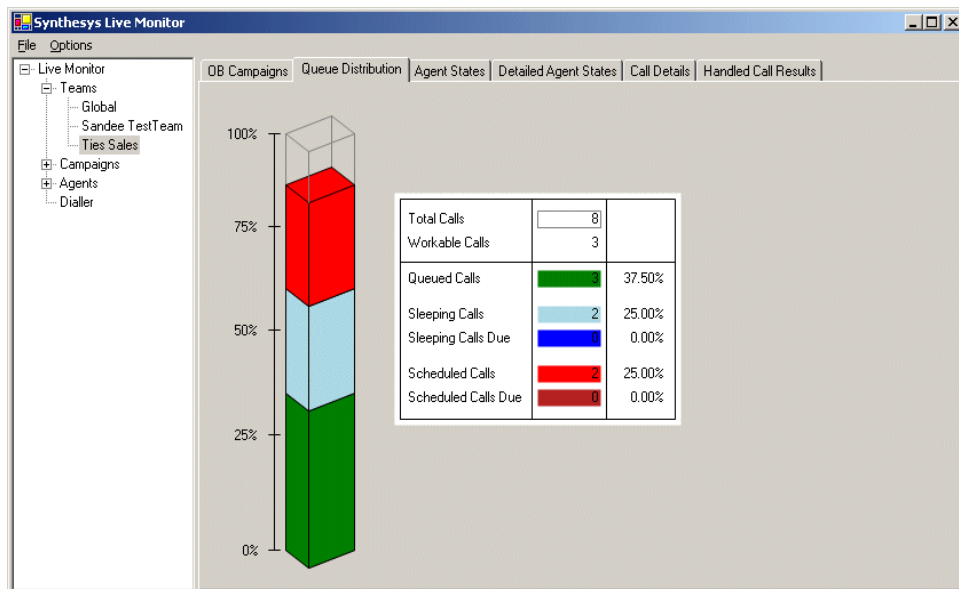
Agent State

The option is available on Team, individual Campaign, Outbound list, Campaign group and 'All Agent' level, displaying a graph representing available Agent States.
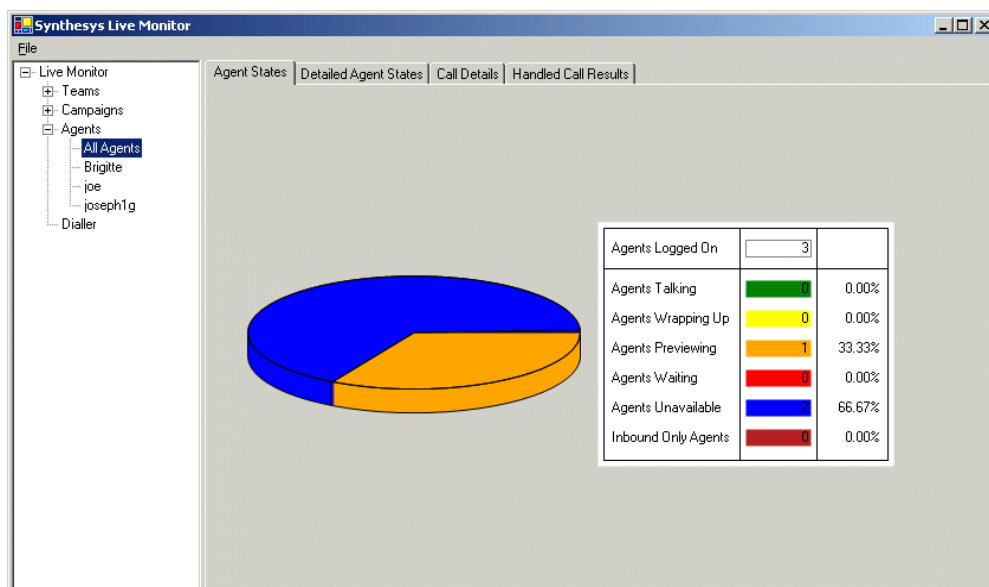
Handled Call Results

This option is available on Team, Campaign, Outbound list, Campaign group and Agent level and displays a graph showing all Handled calls in 'real time', including the Call Results.
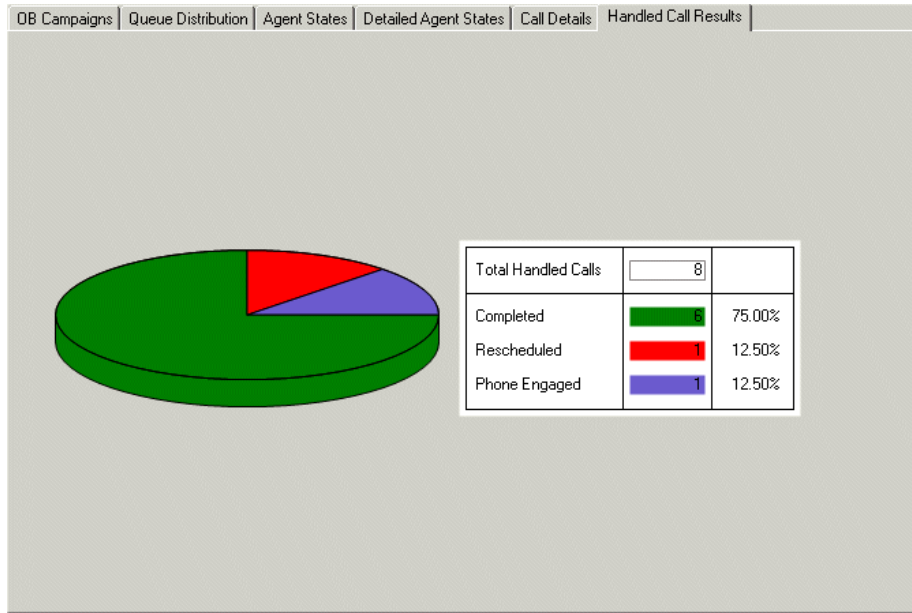
Dialler Results

This option is available on Campaign, O/B campaign and Campaign group level and displays a graph showing dialler result details.
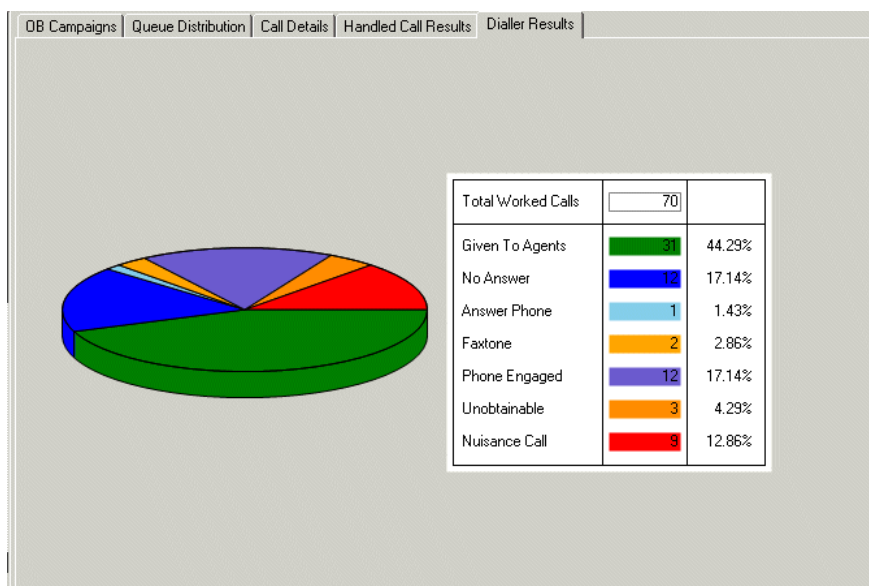
Dialler

CTI Details displays details related to the Predictive Dialler and the Switch.

Option	Displays:
Switch	The switch agents are logged into; if multi switch is used, the different switches, agents are logged into.
CTI Available	True or False, depending on whether or not CTI is available.
Agent Count	The number of agents logged into the specific switch.
Calls in Progress	The number of predictive calls being dialled.
Trunks Available	The number of Trunks available for the Dialler on that switch.
Trunks Allocated	The number of Trunks allocated to Outbound lists.
Trunks Unallocated	The number of Trunks not allocated to Outbound lists.

Licensing
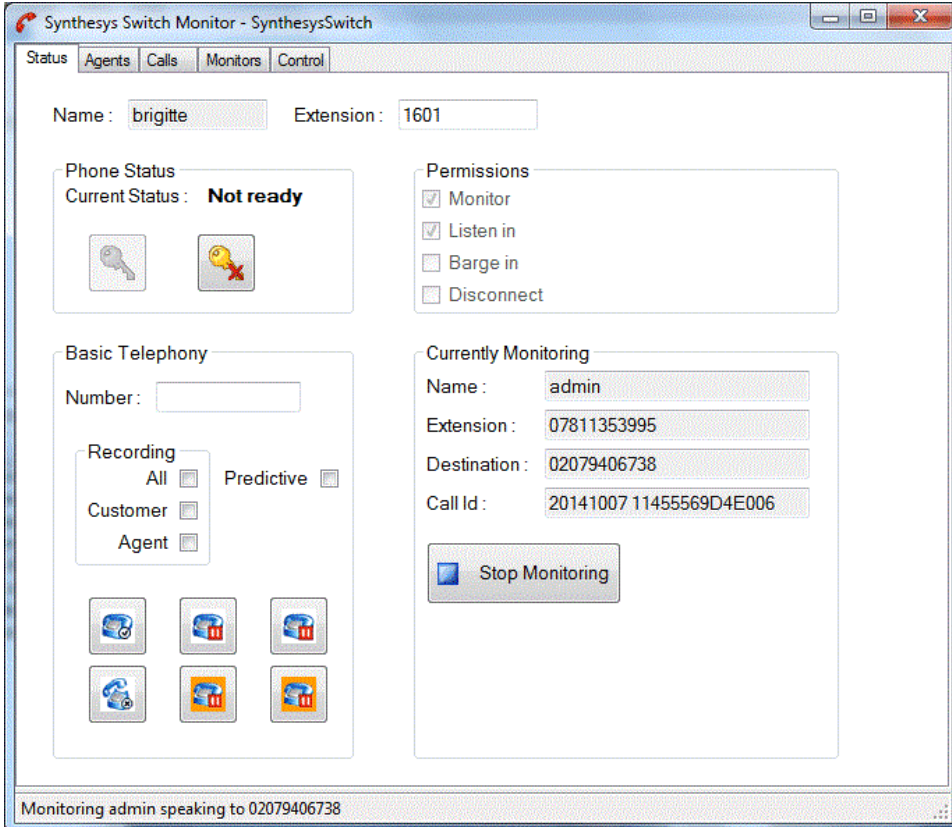
Selecting the *Licensing* option, you can view the current Synthesys and Predictive Dialler licensing arrangements, including:

System ID	Shows the System ID that is generated when Synthesys is installed.
Expiry date	Date the licence expires.
Agent limit	Maximum agents that can be logged on at any one time.
Currently in use	Number of agents that are currently logged on.
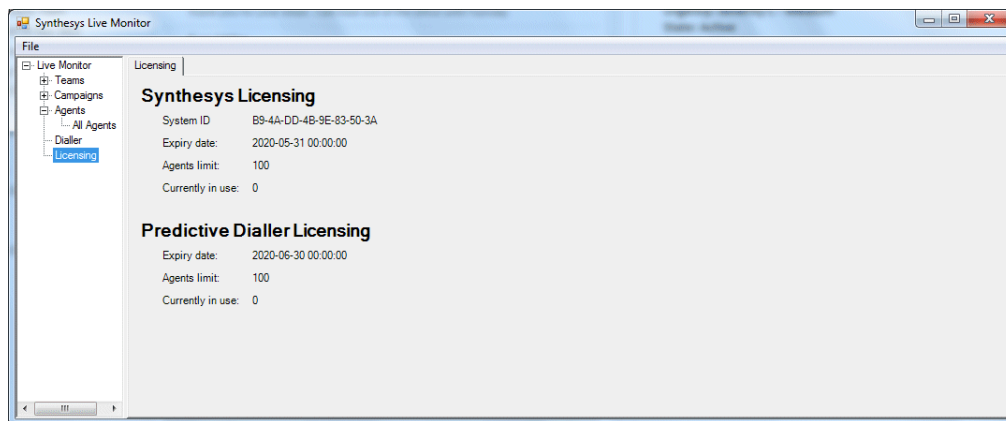
SYNTHESYS VOICE PLATFORM

The SYNTHESYS SWITCH MONITOR

SYNTHESYS SWITCH MONITOR

Introduction

The *Synthesys Switch Monitor* enables supervisors to view and monitor calls made using the Synthesys Voice Platform.

Supervisors can select the type of call that they wish to monitor, for example all predictive calls, or all calls with a specific extension.

The supervisor will then hear a selection of calls, from the moment the call is placed, through to the delivery of the call to an agent, to the call being finished or until the supervisor chooses to stop monitoring the call.

The *Synthesys Switch Monitor* is not a standard feature but needs to be purchased separately.

The Status Screen

To start the Synthesys Switch Monitor:

- Click on *Synthesys Switch Monitor* under the **Monitor** heading of the Synthesys main screen.

The *Name* and *Extension* are taken from the details entered when logging into Synthesys, and should include a valid extension.

In our example, we are logging in with username 'brigitte', using extension '1601'.
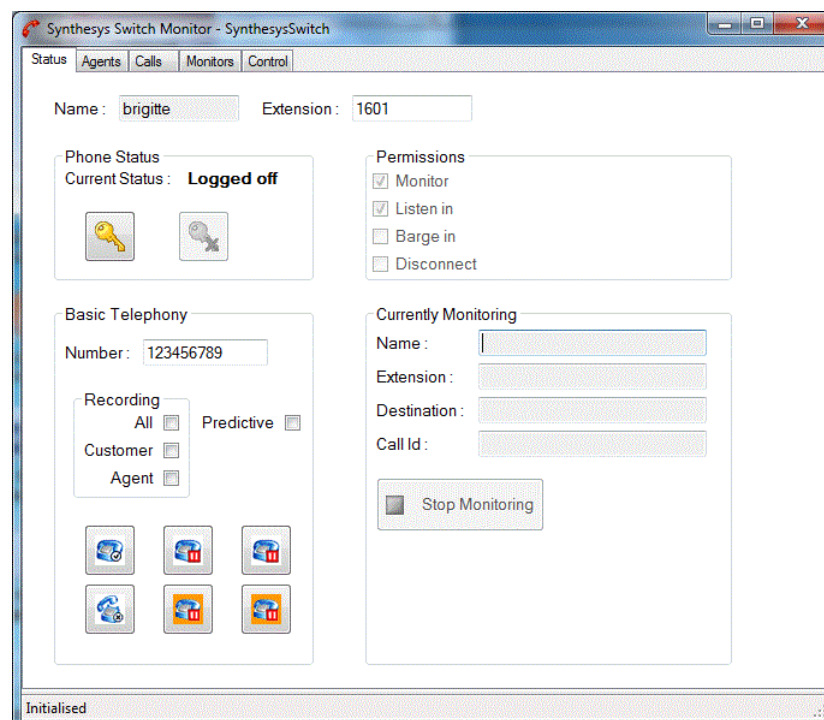
The **Status Bar** shown above saying *initialised* also displays *current call progress* information and other messages.

Please see next page for more information.

The sections available in the Synthesys Monitor main screen include:

Phone State
Permissions
Basic Telephony
Currently Monitoring

Phone State

Logging in the phone

Clicking the 🔑 key icon connects the *Synthesys Voice Platform* to the supervisor phone, when the call is connected then status will turn to *Ready.*

Logging out

Click the key 🔑 icon with a red cross to disconnect and logout from the Synthesys Voice Platform.
Closing the *Synthesys Switch Monitor* will not disconnect the phone, since the phone can still be in use at the same time by the *Synthesys Agent* module.

Permissions

To access the advanced monitoring screens, you need to have the Synthesys *Run Live Monitor* permission, which can be set up in Personnel module.
The permissions ticked show the permissions that are available on your phone system.

Basic Telephony

This allows the CTI engineers to test extensions after an upgrade or the installation of new phone software.

Number: For entering the extension number to be dialled.
Recording: Tick to determine the type of recording file to be created.
Predictive: Tick to call predictively, do not tick to test Preview calling.

📞	Making a call	📞	Hold a call
📞	Hang it up	📞	Unhold a call
📞	Stop recording	📞	Resume recording

The call can be recorded, but is not tagged within Synthesys Call History and so needs to be located manually on disk.

Telephone control should normally be done using the Synthesys Agents module.

Currently Monitoring

When monitoring a call, details of the monitored call appear here.

The Agent Screen

This shows all the currently logged on agents.

- Right click on an agent and select the Monitor option to add the agent to the items being monitored. If the agent is currently on a call, the current call is immediately monitored, otherwise the next call (and all subsequent calls) are monitored.

- To stop monitoring an agent, choose the Stop Monitoring menu option, or use the Monitors tab.

- To log an agent off, select the Logout option.
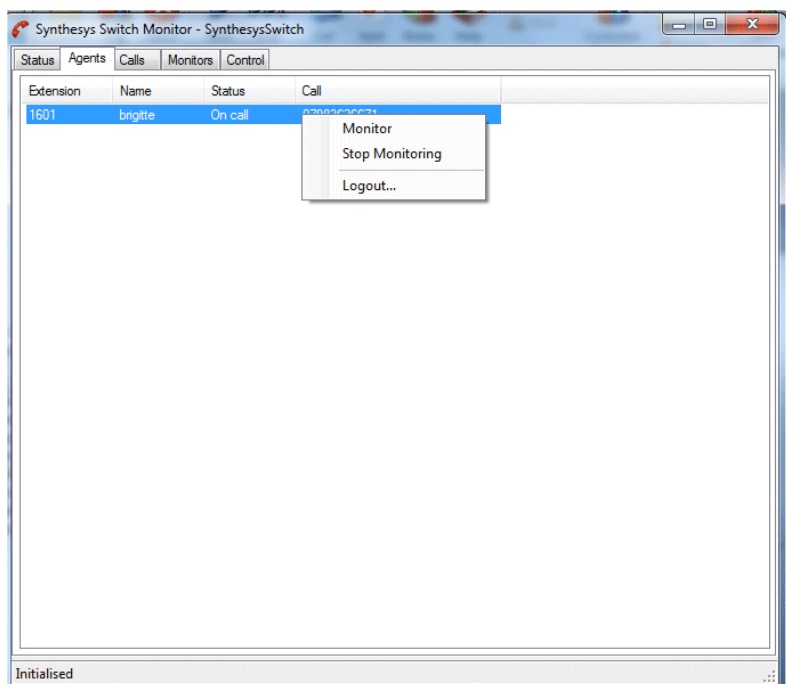
The Call Screen

The Calls Screen is similar to the Agents screen, but **showing all currently active calls** (including calls not currently assigned to an agent).

Again, the call can be monitored from this screen by using the right-click menu option.

The Monitors Screen

For more advanced call monitoring, the Monitors screen can be used.

This is a tree of all the entity types that can be monitored. For example below, we have requested to monitor:

> **All predictive calls**

> **All agents with extension 'Lucifer', and**

> **All Outbound lists.**

Items can be selected or deselected here by pressing the checkbox.
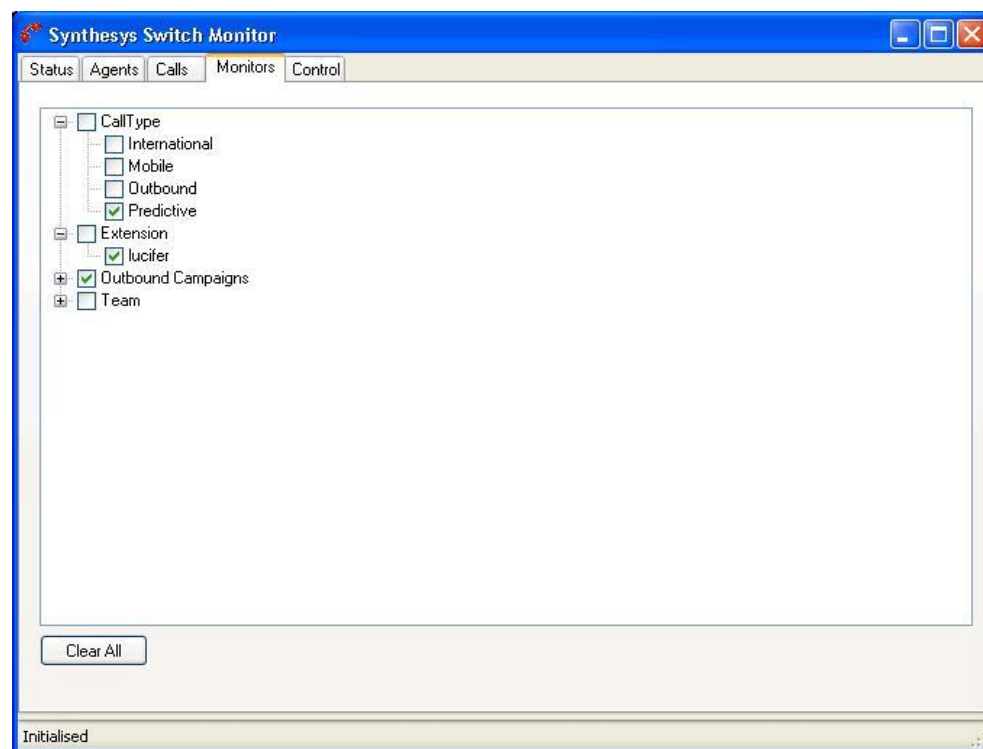
Clear All

The **Clear All** button provides a rapid way of clearing all the monitored items in the tree.

> Note that this won't necessarily stop monitoring the current call, (unless it was associated with a request to monitor an agent); this must be done from the 'Status' screen.

Call Monitoring

Providing that the supervisor who has requested this type of call to be monitored is available and not on or monitoring another call, he or she can monitor a new call whenever it is started to its conclusion, or until the supervisor chooses to stop monitoring the call from the 'Status' tab.

Selecting *Predictive,* for example, the supervisor will hear a selection of predictive calls, from the moment the call is placed, through to the delivery of the call to an agent, to the call being finished.

Call Monitoring Details

Back in the first screen **Status**, we can view details of the currently monitored call.

In our example, the agent *Admin* logged on to extension 07811353995 has called the number '02079406738'. The status bar also provides current call information.
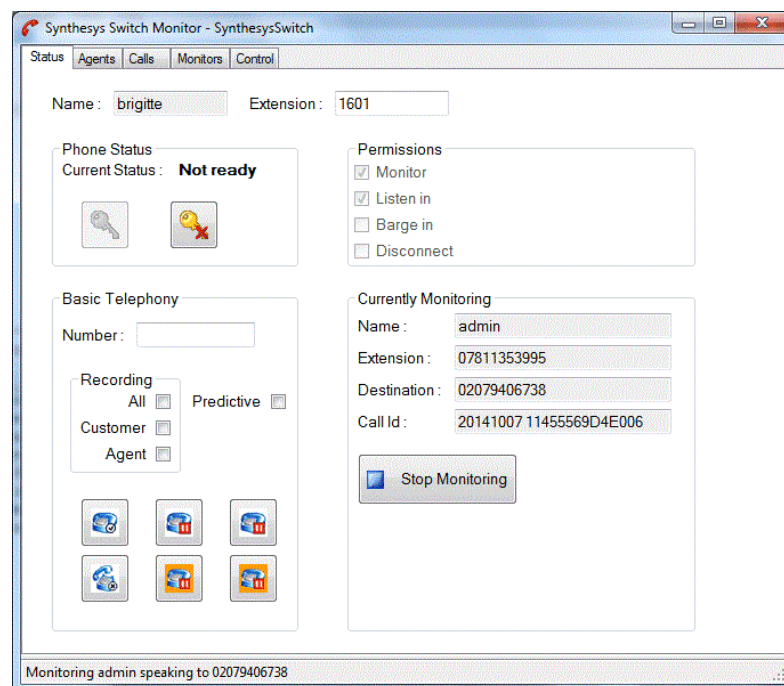
The supervisor can stop monitoring this call by pressing the *Stop Monitoring* button.

The supervisor will then be ready to monitor the next call. To stop monitoring this agent or other classes of calls, the relevant option is deselected in the 'Agents' or 'Monitors' tab.

REPORT VIEWER

SYNTHESYS REPORT VIEWER

Introduction

The Report Viewer is used to add and view SQL reports.

A range of standard SQL reports will be available in the *Report Viewer* as part of the Synthesys installation. Included are for example, the *Agent Utilization*, *Outbound Queue Summary* and *Dashboard* reports.

Your reporting team can design further SQL reports, which you then can add to the *Report Viewer* under the relevant *Global, Agents or Campaigns* categories.

Starting the Report Viewer

To start the Report Viewer:

- Click on *Reports* under the *Monitor* heading of the Synthesys main screen.
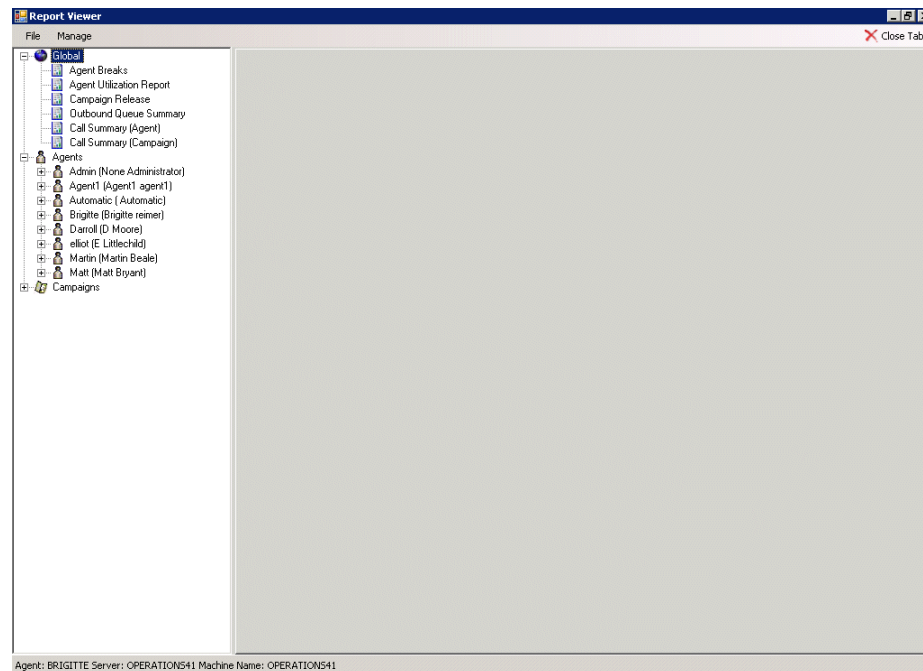
File Options

RefreshTree. To update the list of reports displayed.

Exit. To exit the Report Viewer and return to the Synthesys main screen.

Manage Options

Add Report. To pick up a new SQL report from the server and to display it under the selected categories.

Remove Report. To remove an SQL report from the category lists.

Viewing Reports
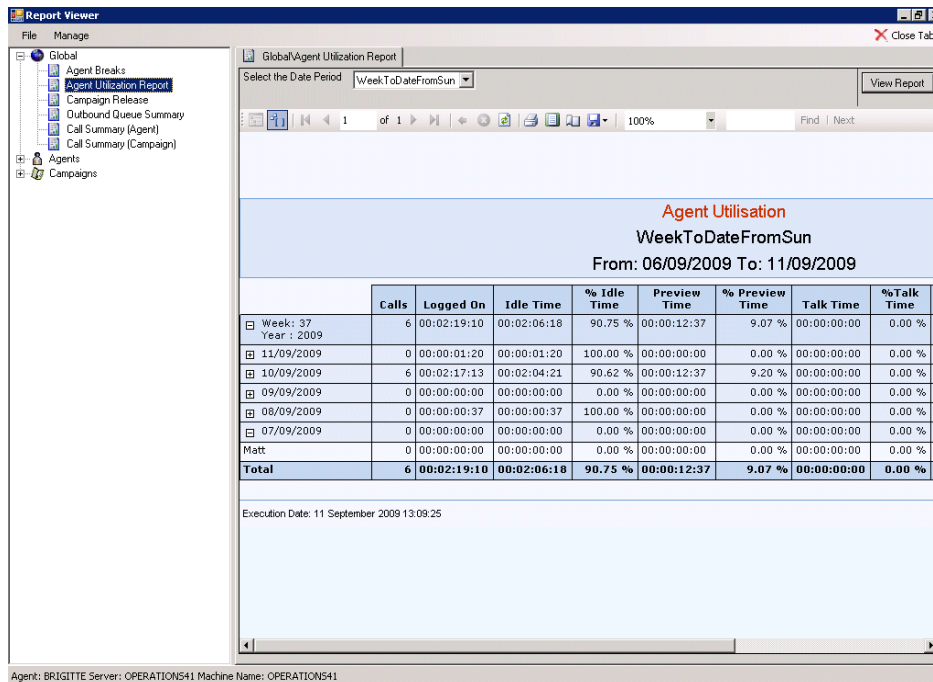
To open a report:

- Select the report under the relevant category **Global, Agent** or **Campaign** in the tree structure on the left side of the Report Viewer

- Double click on the report to display report details on the right side of the Report Viewer.

Some reports, for example the Agent Utilization, Outbound Queue Summary and Dashboard reports, will open automatically.

For other reports you need to specify a date period parameter, before the report opens, displaying the required information.

Please see next page for more information.

Entering Date Period parameters

Some reports have been set up to display data for a specified time range automatically, for example the *Agent utilization report*, for others a date period needs to be selected.

To specify the desired date period:

- Select the report that you wish to open in the tree structure on the left side.

- Choose the required date period parameter from the **Select a date Period** drop down menu.

- Click the **View Report** button on the top right of the Report Viewer.

The report will open displaying the data for the selected time period.

Adding new SQL Reports

A range of standard SQL reports will be available in the Report Viewer as part of the Synthesys installation. Other SQL reports can be designed by your reporting team. To add these reports:
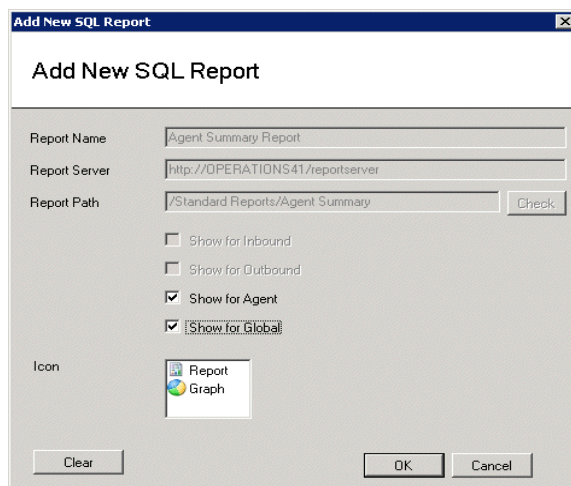
- Go the **Manage** on the Menu bar and select the *Add Report* option.

- In the Add New SQL Report dialog, enter the *Report Name,* the URL address for the *Report Server* and the *Report Path*

If the report path entered is incorrect, a message will prompt you to check the path.

- Click the *Check* button, to locate the report.

- Next, select the *category* under which the report is to be displayed. Options not relevant for the type of report selected will be disabled.

- Select the *icon* that should be displayed with the report.

If you forget to select a category or icon, a message will prompt you do to do so.

APPENDIX

MESSAGE OF THE DAY

MESSAGE OF THE DAY

The **Message of the Day** enables Account Managers and Supervisors to send *Quick Messages* containing simple text or *HTML Messages* with more complex information around the Call Centre to the Agents' workstation.

It is also possible to switch on and off tune sound on the Agent workstation, when a new *Message of the Day* arrives.

Details of quick messages will be stored in the Phoenix Audit table, including information about who has sent a message and to whom it was sent, the date it was sent and from which machine, and the content of the message.

To access details of the Phoenix_Audit table, you need to either query the table directly, or write a report to analyse audits for quick messages.

Sending Messages

The Message of the Day window will open as soon as the Agent logs on to the Synthesys system. Messages can be sent either as a quick, instant Message or as a HTML Message.

Quick Messages contain simple text messages and can only be sent out to agents currently logged on to the Synthesys system.

The message will pop up on the bottom right hand corner of the screen and will be automatically deleted once the message has been read and is closed.
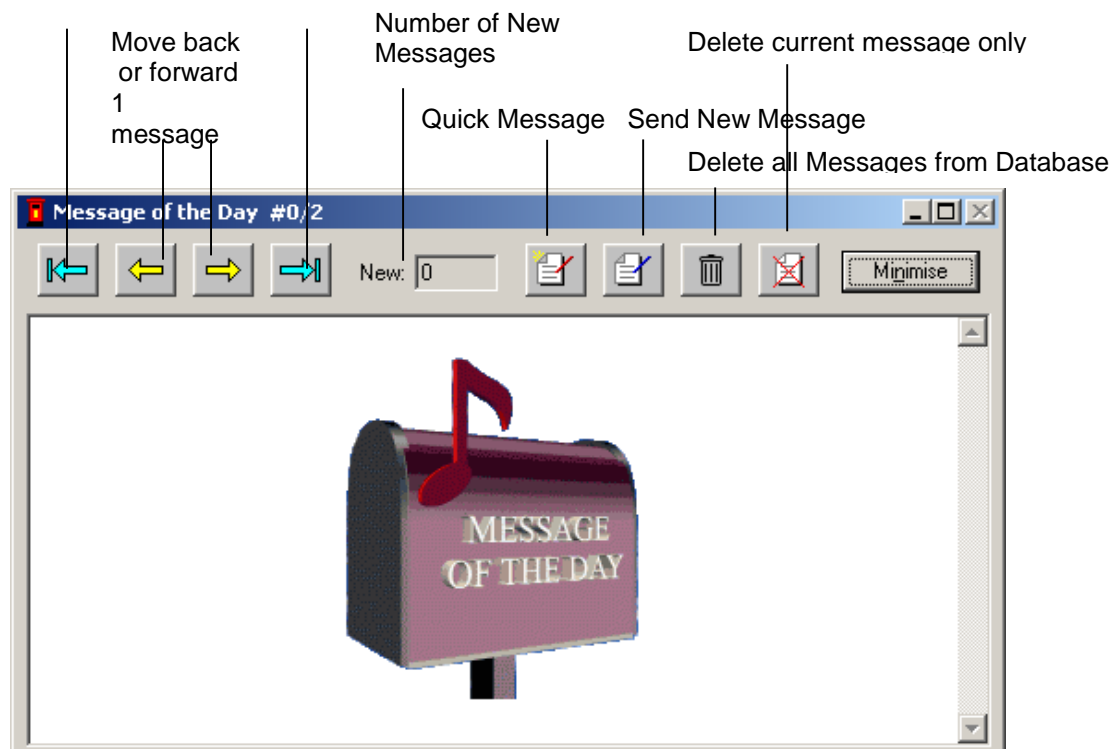
HTML Messages contain more complex messages, which are saved to the database and can be opened as required.

If messages are dispatched while agents are busy taking calls, a post-box icon will be displayed on the right-hand side of the taskbar, alerting the agent to the fact that a new message has arrived.
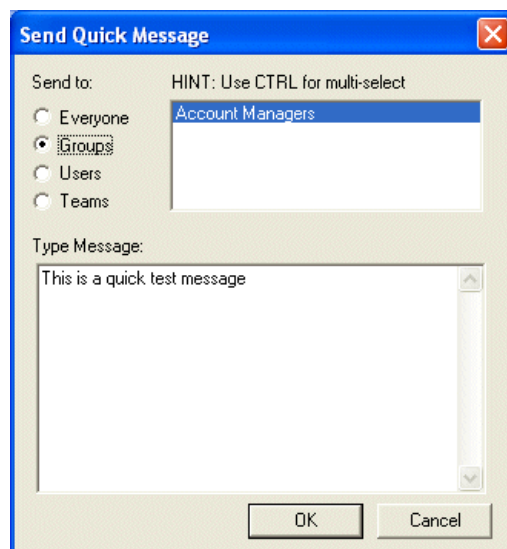
Send Quick Message

If you wish to send a quick and simple text message

- Click the **Quick Message** icon represented by the notepad with a red pencil.

- From the *Send To* list, choose the user group (Everyone, Groups, Users or Teams) that should receive your message.

- Next, select the individual groups (Account Manager, Agent, etc.) users, or teams, as required, holding down the *Ctrl* button on the keyboard for a multiple selection.

- Type your message into the *Type Message* field and click OK to send the message.

When the *Quick Message* has been dispatched, the **Quick Message** dialogue window will open, displaying the information to all selected users or persons in the selected groups and teams, as long as they are currently logged on to Synthesys.
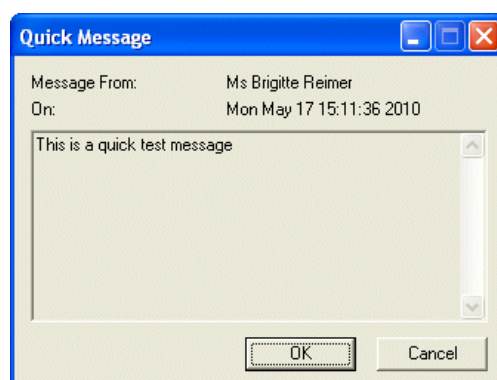
Send New HTML Message

To send an HTML message

- Click on **Send New Message** , represented by the notepad with the blue pencil, to open your HTML Editor (Front Page or Word), where you can enter your message.

- After closing your HTML Editor, click YES to save your message to the Database.
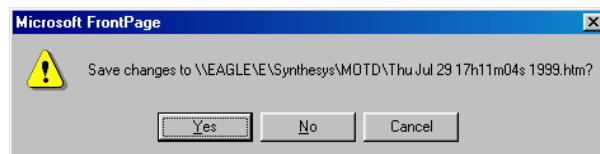
A post-box icon will be displayed on the right-hand side of the taskbar on the agents' workstation, showing that a new message has arrived.

Reading your HTML Messages

In the *New* field the number of new, unread messages will be displayed.
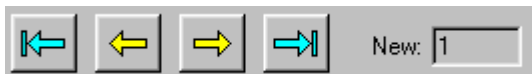
The yellow arrow keys enable you to move back or forward one message at the time, the blue arrow keys allow you to move to the first or the last message received.

Deleting HTML Messages

To delete all HTML messages from the Database

- Click on the bin icon .

- Only Account Managers or Supervisors with access permission to the Callflow Editor are able to delete HTML messages.

To delete the currently displayed message only

- Click on the 'Delete current message' icon .

Message of the Day Sound

It is also possible to switch on and off tune sound on the Agent workstation, when a new *Message of the Day* arrives.

The sound to play, i.e. short, long, or broadcast is defined by registry value *Sound* of the key:
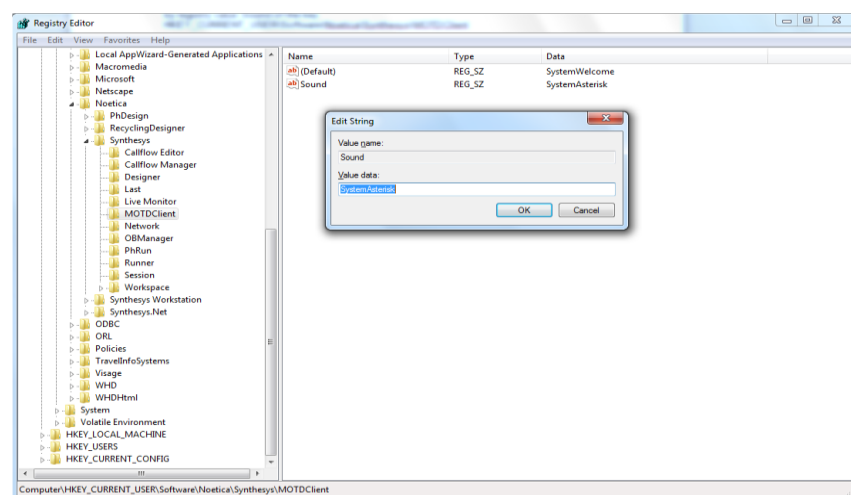
HKEY_CURRENT_USER\Software\Noetica\Synthesys\MOTDClient

If the value is from the following list

SystemAsterisk
SystemQuestion
SystemHand
SystemExit
SystemStart
SystemWelcome
SystemExclamation
SystemDefault

then the respective sound from the system defined sound scheme is played. If the value is not from the list, the SystemDefault sound is played."

No sound is played, if the key or the value in it does not exist, or if the value is an empty string.

If you wish to use sound, we will send you a text file MOTDClient. To run the key you have to change the extension from .txt to .reg.

Windows Registry Editor Version 5.00

[HKEY_CURRENT_USER\Software\Noetica\Synthesys\MOTDClient]

"sound"="SystemAsterisk"

NOTES

NOTES