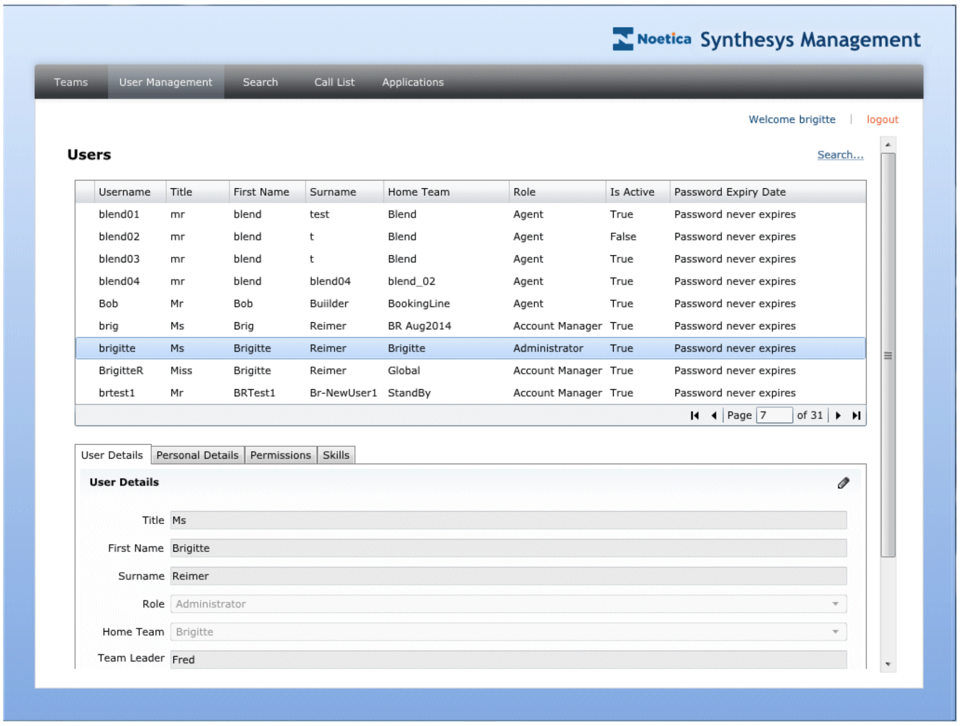
SYNTHESYS MANAGEMENT

User Management



SYNTHESYS .NET USER MANAGEMENT

INTRODUCTION

Depending on the permissions assigned to a user, individuals with access to the ***User Management*** page will be able to:

- View details of existing users
- Add new users
- Assign permissions to individual users
- Assign specific skills and attributes to users
- Modify details and permissions of existing users

New user skills and attributes are initially added to the CS_USERS table via the Entity/ CRM control. They are then assigned to the individual users in Synthesys Management, using the Skills tab of the User/ User Details dialogs.

*Using **Active Directory** integration, users will be created and managed directly through Active Directory, rather than via Synthesys User Management. Please see the section on Active Directory for more information.*

STARTING SYNTHESYS USER MANAGEMENT

In the Synthesys Management main page:

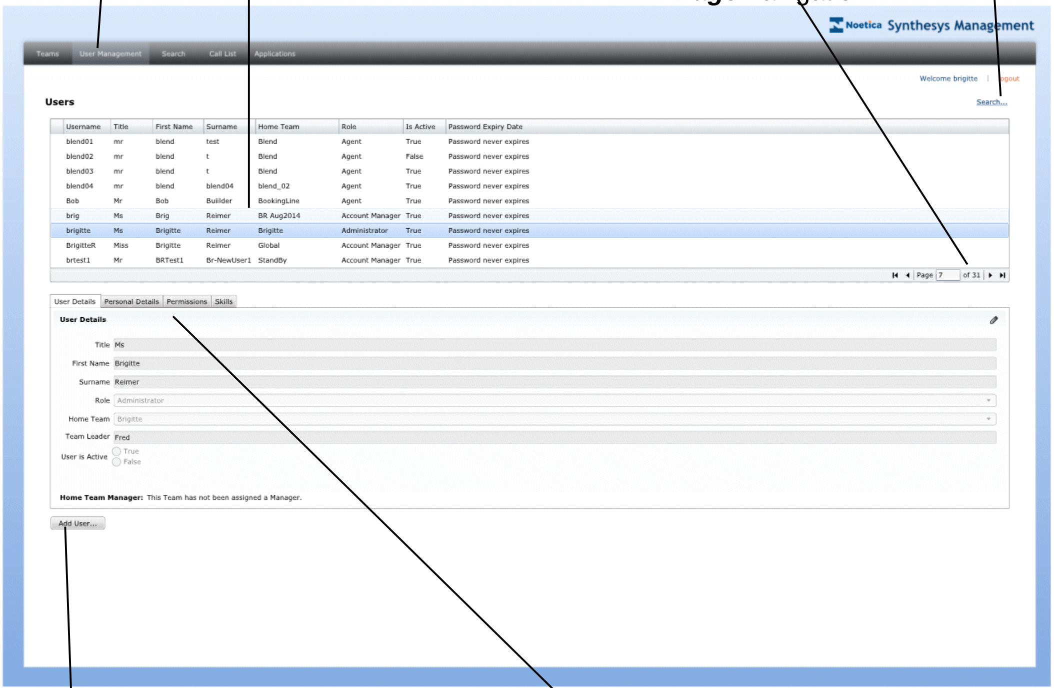
- Click the **User Management** tab at the top of the screen.
- The ***Users*** page will be displayed, showing the first ten Synthesys users in alphabetical order.

User Management tab, to open the *Users* pages

Users section, listing users set up in Synthesys

Search option

Page navigation



User Details section with Personnel Details, Permissions & Skills tabs

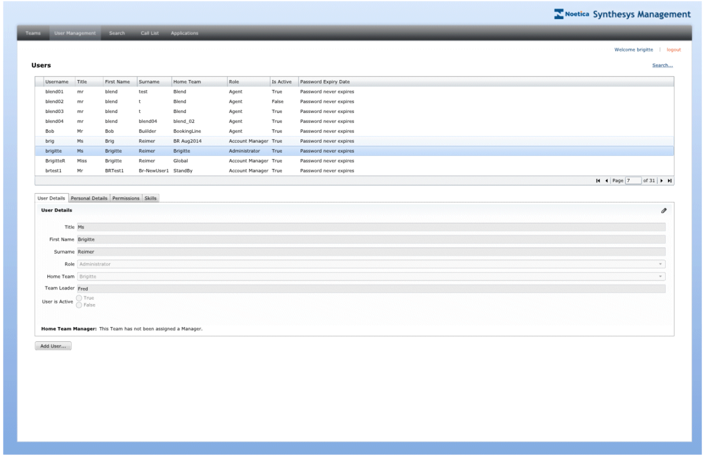
Add User button, for entering new user details

Please see the following pages for a description of the options available in the *User Management* page.

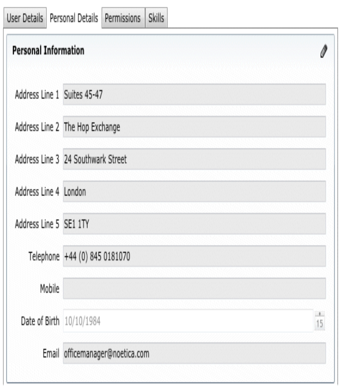
Viewing User Details

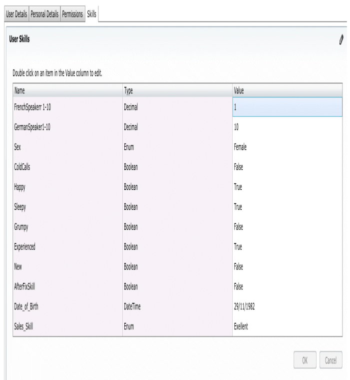
In the Synthesys Management main page:

- Click the **User Management** tab at the top of the screen, to display the ***Users*** page, initially showing the first ten Synthesys users in alphabetical order.
- To display further users on subsequent pages, enter a specific page number, or use the arrow buttons  , to move to the next page.



- Select a specific user in the ***Users*** *section*, to display additional details in the ***User Details*** section, including *user name*, the *Role, Primary Team* and current user state.
- Click the ***Personnel Details*** tab, to view further information associated with the user.
- Click the ***Permissions*** tab, to view the access permissions assigned to the user.
- Click the ***Skills*** tab, to view skills and attributes assigned to the user.

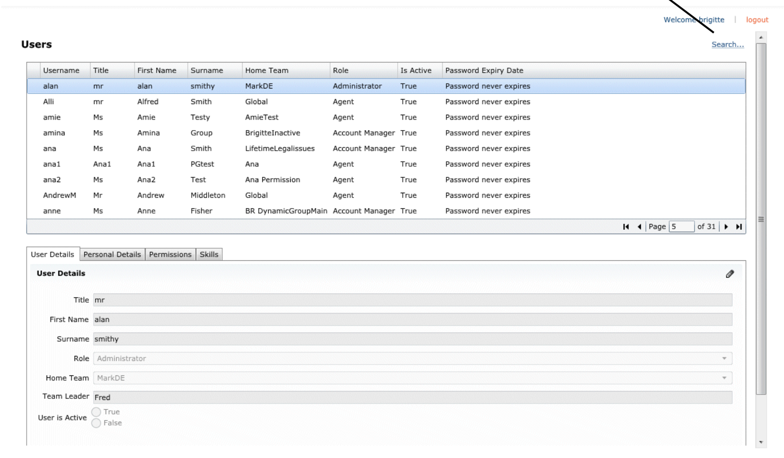




Locating individual Users

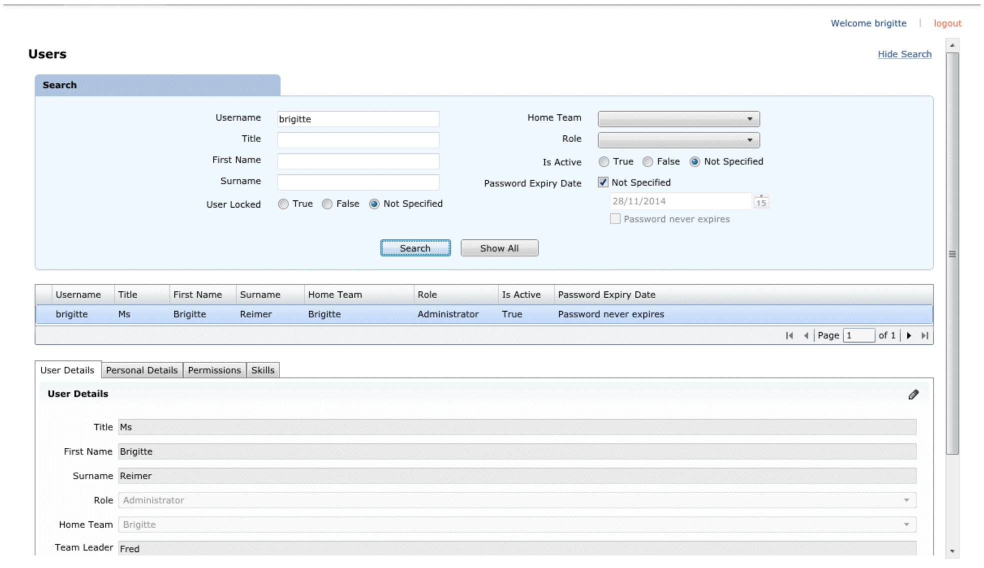
To quickly look up details for a user or users assigned to a specific role, use the **Search** option in the ***User Management*** screen.

- On the top right of the *Users* page, click **Search**.



This will open the Search dialog.

- Enter your search criteria, as required, into the relevant field(s).
- Click the Search button, to display the relevant information.

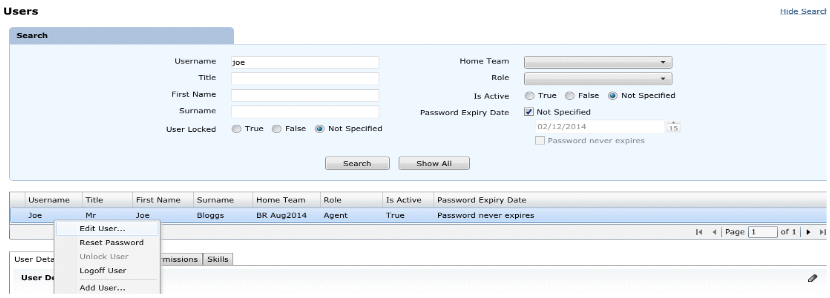


- To edit user details, click the *pencil icon* on the right.
- To show the list of all users again, click the ***Show All*** button.

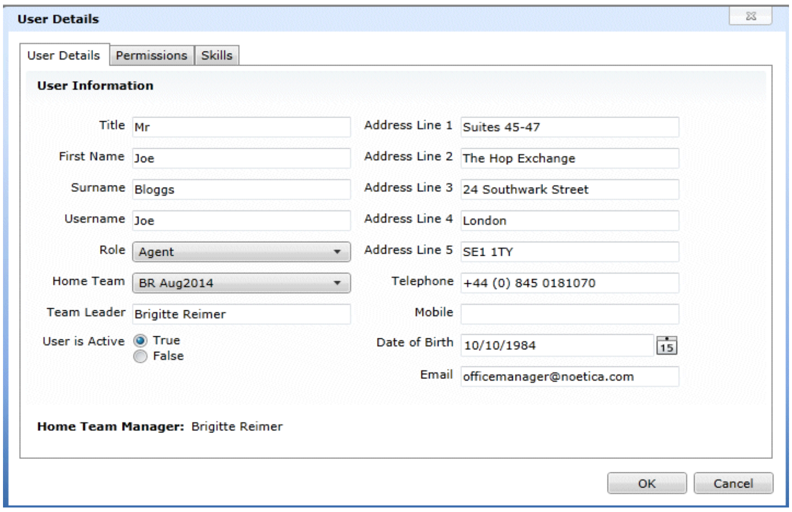
Modifying User Details

To edit information for existing users:

- Click **User Management** in the *Synthesys Management* main page.
- In the **Users** page click on **Search** in the top right of the *Users* page
- Click your right mouse button on the user and select ***Edit User***... from the list.



- In the **User Details** dialog now displayed, make any changes to the existing details, as required.
- To change existing permissions, click the **Permissions** button.
- To change existing skills, click the **Skills** tab.

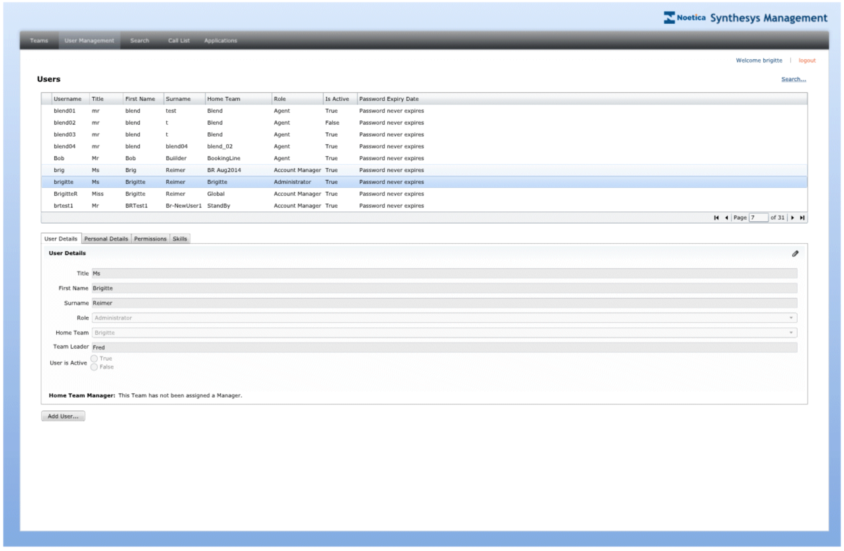


Click **OK** to save the information, or **Cancel** to cancel the action without saving the changes.

*Using **Active Directory** integration, a user's details will be modified directly through Active Directory, rather than via Synthesys User Management. Please see the section on Active Directory Integration for more information.*

Alternatively, edit details by selecting the user in the **Users** screen

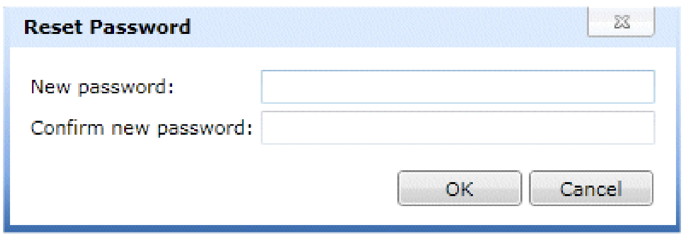
- Click the pencil icon  to open the *Edit* mode.
- Exit the *Edit* mode by clicking on the *pencil icon* again, before selecting another tab.



Resetting an existing Password

To reset an existing user password:

- Click **User Management** in the *Synthesys Management* main page.
- In the **Users** page, click your right mouse button on the user and select ***Reset Password***... from the list.
- Enter and confirm the new password, then click OK

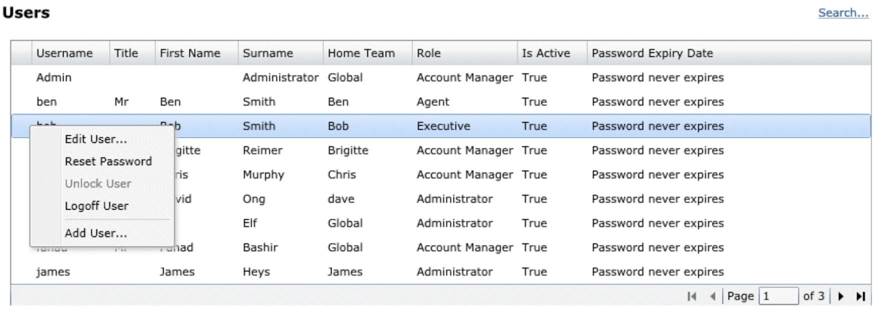


*Using **Active Directory** integration, a user's password will be changed directly through Active Directory, rather than via Synthesys User Management. Please see the next section on Active Directory Integration for more information.*

Unlock User

To enable a user to log back into the Synthesys Portal after being locked out for using an incorrect user name or password

- Click **User Management** in the *Synthesys Management* main page.
- In the **Users** page, right click on the user, and select ***Unlock User*** from the drop down list.

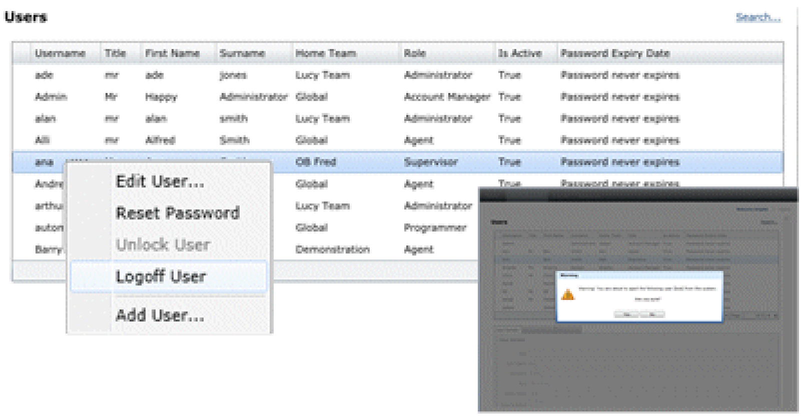


Logoff User

Using the **Logoff User** option users can be ejected from the system. This is useful if, for example, a user is logged out following a system crash and unable to log back in.

To force the simultaneous logoff from all Synthesys.Net modules, including Synthesys Management, the Synthesys Interaction Studio and the Synthesys Portal

- Click **User Management** in the *Synthesys Management* main page.
- In the **Users** page, right click on the user, and select ***Logoff User*** from the drop down list.



- A message will inform you that you are about to eject the selected user from all Synthesys.Net modules.

Adding New Users

Details for new users are added via the ***User Details*** and ***Permissions*** tab headings in the **User Details** dialog.

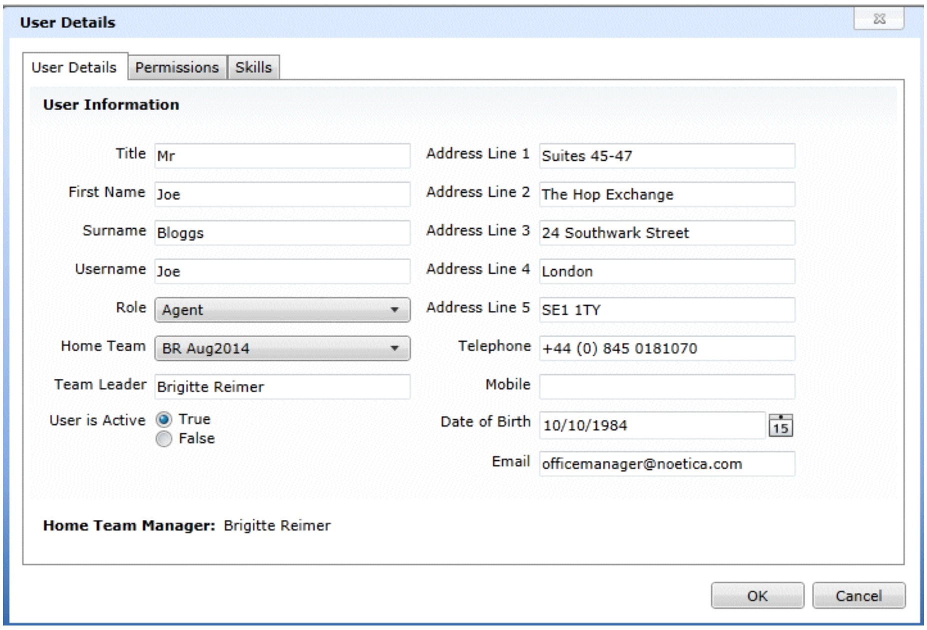
*Using **Active Directory** integration, new users will be created directly through Active Directory, rather than via Synthesys User Management. Please see the section on Active Directory for more information*

To add details for new members of staff using *Synthesys Management*:

- Click the ***User Management*** tab at the top of the *Synthesys Management* screen.
- In the **Users** page, right click on a user and select *Add User*... from the drop down menu, or alternatively click the ***Add Users*** button at the bottom left of the *User Details* section.

In the **User Details** dialog subsequently displayed

- Enter the personal details and login details for the new user and select a role, a primary team and date of birth, as required.



- Click the **Permissions** tab, to assign the required access permissions for the user.

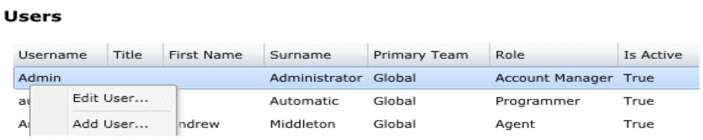
Please see next page for more information.

Assigning User Permissions

When adding new users, the users are assigned to a role, reflecting the tasks that they will carry out within Synthesys.

Each role, i.e. ***Agent*** or ***Account Manager***, has a set of standard permission associated with the role. Additional permissions can then be assigned to a selected user via the *Permissions* dialog.

- Click the **User Management** tab in the Synthesys Management screen.
- In the ***Users*** page, locate and right click on the user, whose permissions you wish to edit.
- Select ***Edit User..*** from the drop down menu.



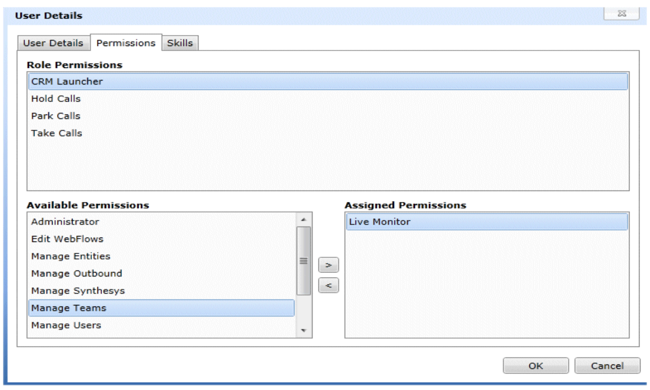
- In the User Details dialog, select ***Permissions***.
- The existing user permissions are displayed in the *Role Permissions* section.

To add additional permissions

- Select the permission in the ***Available* Permissions** section.
- Use the arrow > to move it into the **Assigned Permissions** section.

To remove additional permissions

- Use the arrow < to move the permission from Assigned Permissions back into the ***Available*** Permissions section.



- Click **OK** to save the information.
- Click **Cancel,** to cancel the action without saving the changes.

Available Permissions

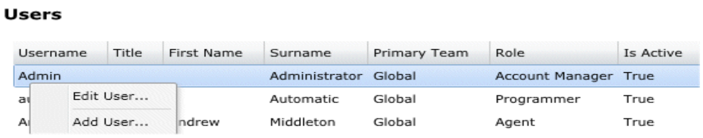
Permission	Description
Administrator	The Administrator permission automatically allows access to all available permissions.
CRM Launcher	Not applicable in the current version.
Edit Webflow	Permission to edit webflows in the Synthesys.Net Interaction Studio. If the *Use Team Based Webflow Edit Permission* option is enabled, then users without Administrator permission need to be a member or team manager of the same team as the webflow, or of one of the parent teams of the team containing the webflow, to edit/ publish webflows.
Hold Calls	Permission to *Hold and* retrieve *held* calls via the Synthesys Portal in the Web Browser and to view call details of held calls.
Live Monitor	Permission to view *real-time* information of call centre activities in the Synthesys Dialler Platform, with information about Queue distribution, Agent State, Handled Call Results being visually represented in graphs.
Manage Outbound	Not applicable in the current version.
Manage Teams	Permission to add and delete teams in the Synthesys Management module and to assign agents and campaigns to teams.
Manage Users	Permission to add and modify users in the Synthesys Management module and to manage user permissions.
Parked Calls	Permission to *Park* and retrieve parked calls via the Synthesys Portal in the Web Browser and to view details of parked calls.
Publish Webflows	Permission to publish webflows in the Synthesys.Net Interaction Studio so that agents can take calls on the latest version. If the *Use Team Based Webflow Edit Permission* option is enabled, then users without Administrator permission need to be a member or team manager of the same team as the webflow, or of one of the parent teams of the team containing the webflow, to edit/ publish webflows.
Report Viewer	Not applicable in the current version.
Take Calls	Permission to handle calls via the Synthesys Portal in the Web Browser.
Manage Entities	Permission to configure the Entity control and Entity Input and Output actions.
Manage Synthesys	Gives users the right to access Workspace Management and to manage users and teams.
Manage Workflows	Not applicable in the current version.

Assigning User Skills and Attributes

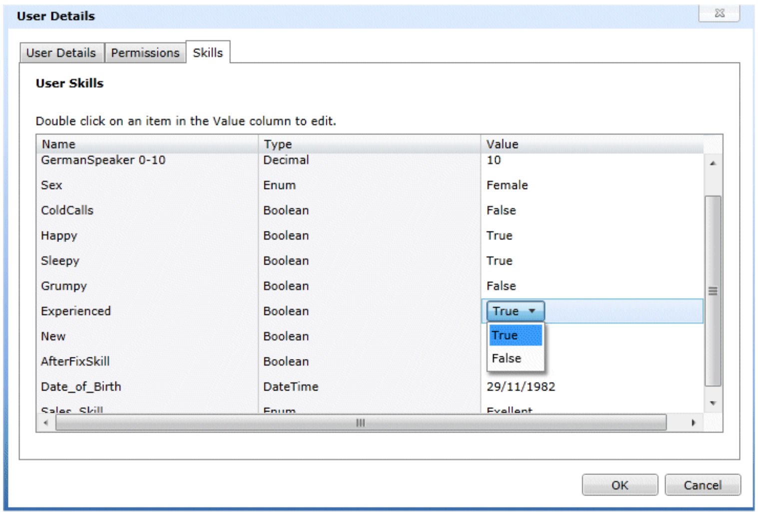
Skills and attributes are assigned to users via the **Skills** tab of the *User Details* dialog.

New user skills and attributes are initially added to the CS_USERS table via the Entity/ CRM control. They are then assigned to the individual users in Synthesys Management, using the Skills tab of the User/ User Details dialogs.

- Click the **User Management** tab at the top of the Synthesys Management screen.
- Locate and right click on the user and select ***Edit User..*** from the drop down menu to open the User Details dialog.



- In the User Details dialog, select ***Skills***.
- In the Skills page, all available user skills and attributes, as added to the CS_USERS table via the Entity/ CRM control, are displayed.



- Assign the skills and attributes for the selected user, as required, in the **Value column** of the Skills dialog.
- Click **OK** to save the information.
- Click **Cancel,** to cancel the action without saving the changes.

SKILLS BASED USER SEARCH

Using the **Search** tab in Synthesys Management, contact centre managers or supervisors can search for users based on their skills and attributes, and to assign these users to the relevant teams.

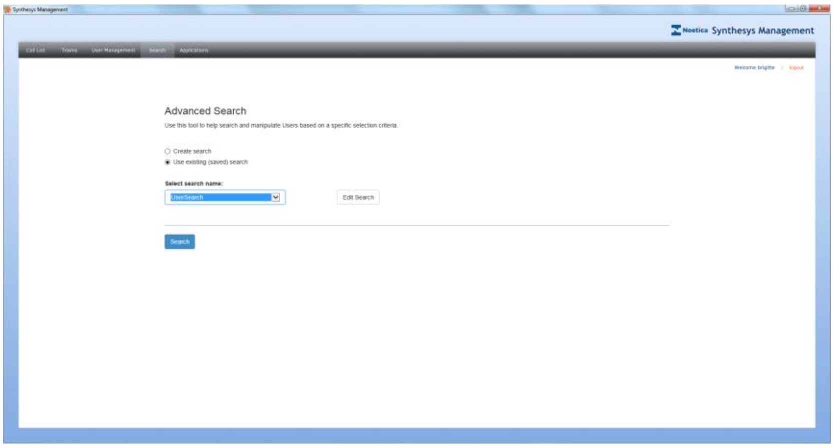
Clicking the **Search** tab will open the ***Advanced Search*** dialog, where supervisors can specify conditions for a new search or select a previously defined search.

Staff members that match the search criteria are displayed in the **Search Result** dialog, from where they can be moved or copied to the appropriate teams.

New skills and attributes are initially added to the CS_USERS table via the Entity/ CRM control. They are then assigned to the individual users in Synthesys Management, using the Skills tab of the User/ User Details dialogs.

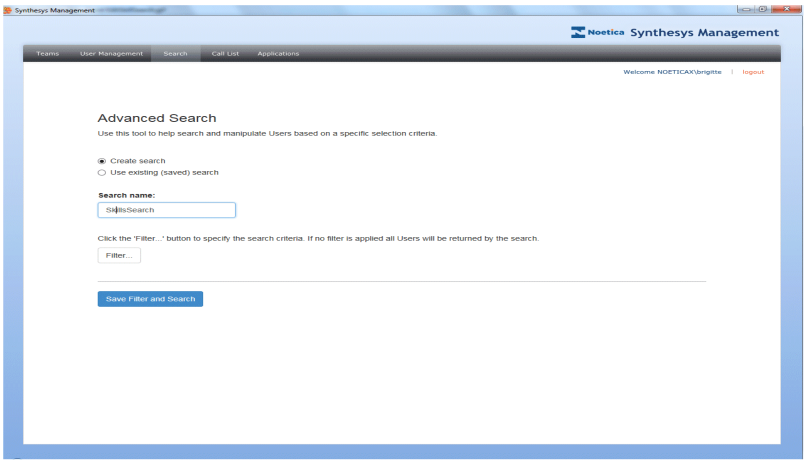
Selecting existing search criteria

- Click the **Search** tab in Synthesys Management.
- Select **Use existing (saved) search** in the ***Advanced Search*** dialog.
- In the **Search name** field, select the relevant search name from the drop down list.
- To edit existing conditions created for the selected search name, click the **Edit Search** button. Please see page 17 of this document for more details.
- To view the results for the selected search click the **Search** button.



Creating a new search

- Click the **Search** tab, to open the ***Advanced Search*** dialog.
- Select **Create search,** click into the **Search name** field, and enter a new search name.
- Click the **Filter…** button, to define the new search criteria, as required.



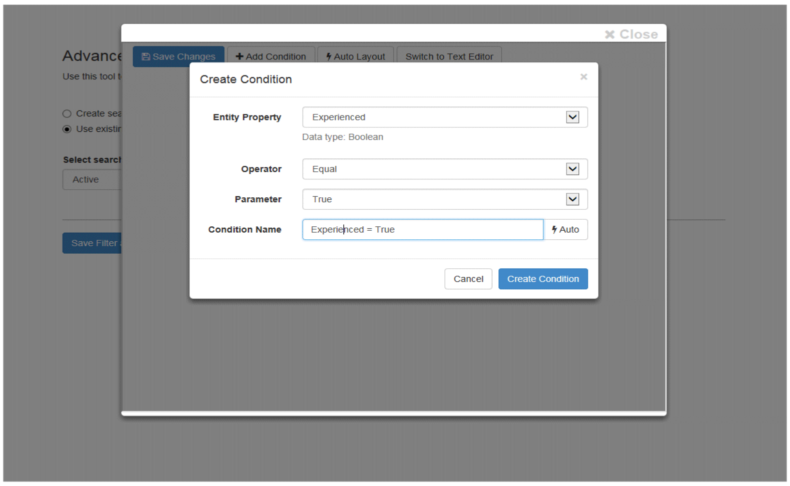
Please see next page for more information.

Defining Conditions for a new Search

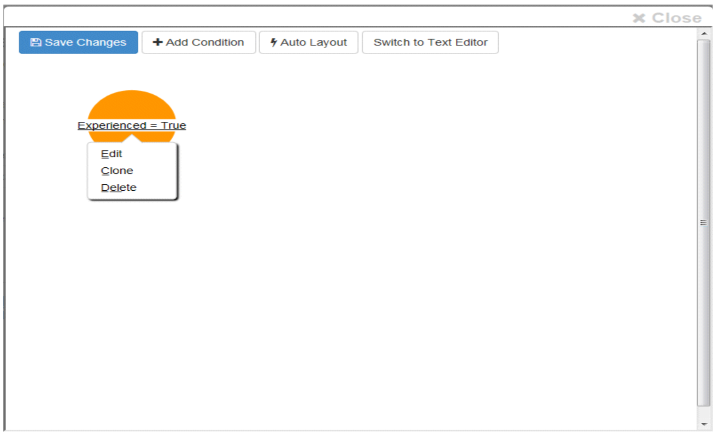
In the *Create Search* dialog you can add conditions to help search and manipulate Users based on a specific selection criteria. You can create criteria for a new search, and edit or delete the condition discs created. The condition discs can be displayed in auto layout or via the text editor.

To define the first condition for the new search criteria

- Click the **Add Condition** button, to open the ***Create Condition*** dialog.
- Use the **Data Field** drop down list, to select the criteria on which to base your search, e.g. Experienced.
- Select the relevant **Operator and Operator Parameter** from the respective drop down lists, i.e. Operator **= Equal** and Operator Parameter = **True.**
- The **Condition Name** field shows the search criteria set: Experienced = True.



- Click the **Save Condition** button, to save the criteria for the current conditions.
- Click **Cancel**, if you do not wish to create the condition.



- Create any further conditions as required following the above steps.

Edit, Clone or Delete a Search Condition

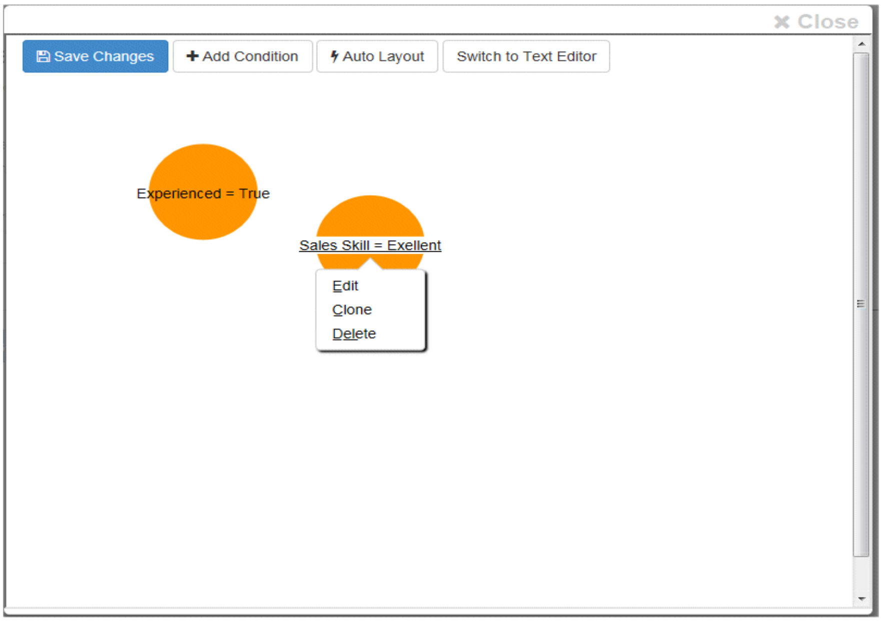
To edit, clone or delete a condition created

- Select the condition disc that you wish to edit.
- Click on the condition name and select **Edit, Clone** or **Delete** as required.
- Make the relevant changes in the Edit Condition dialog.
- Click the **Save Condition** button, to create the condition.
- Click **Cancel**, if you do not wish to create the condition.

Saving Changes to Conditions set

To save all search criteria defined for the new Search name

- Click the **Save Changes** button.
- A message: ***Success! Filter saved*** will appear at the bottom right of the dialog, to confirm that the condition has been saved.



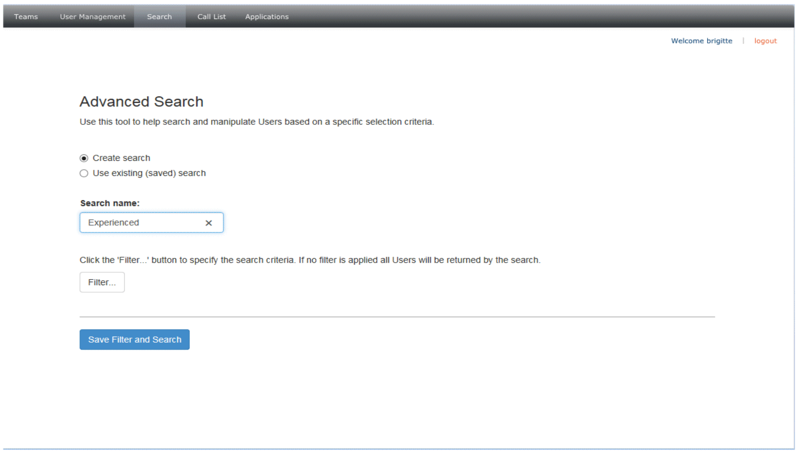
- Click the CLOSE button at the top right of the screen, to return to the *Advanced Search* page.

The next page describes how to view the search results for your condition(s) set.

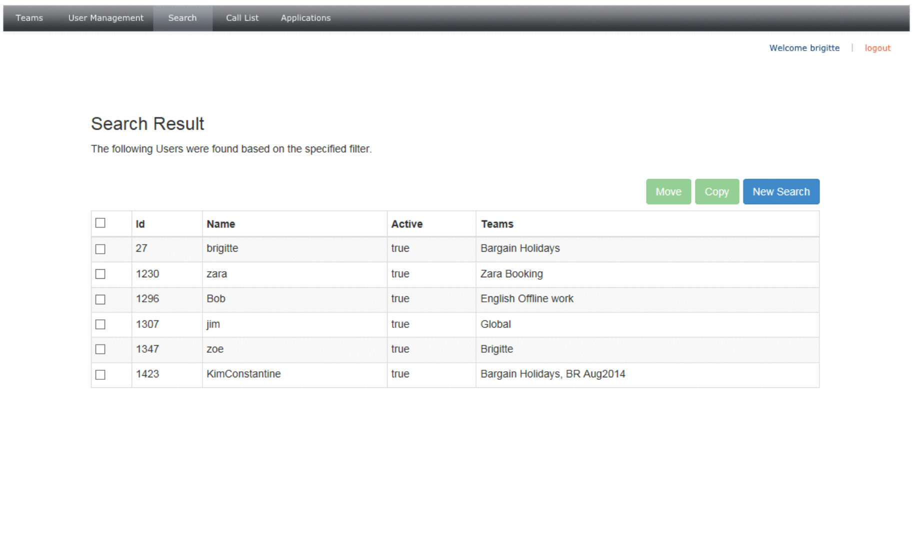
Viewing Search Results

To return the users that match either a newly created or existing search

- Check that the **Search name** field contains the name of the relevant search.
- Click the **Save Filter and Search** button, to open the *Search Result* dialog.



- All users that match the particular skills and attributes defined under the selected search name will now be displayed in the *Search Result* screen.
- The **ID** and **Name** columns in the grid show the user ID and username of staff members displayed. The Active column shows *True* if a user is active, else *False*. The **Team(s)** column lists the teams of which the users displayed are currently members.



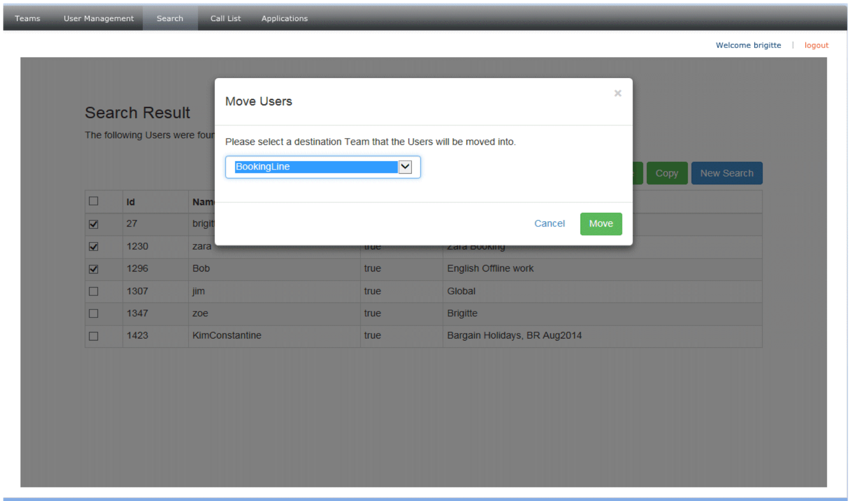
For information about assigning users to the required teams, please see the next page.

Assigning Users to Teams

Any user displayed in the Search Result dialog can now be moved or copied to the appropriate team.

To move users out of their current team(s) into a selected team

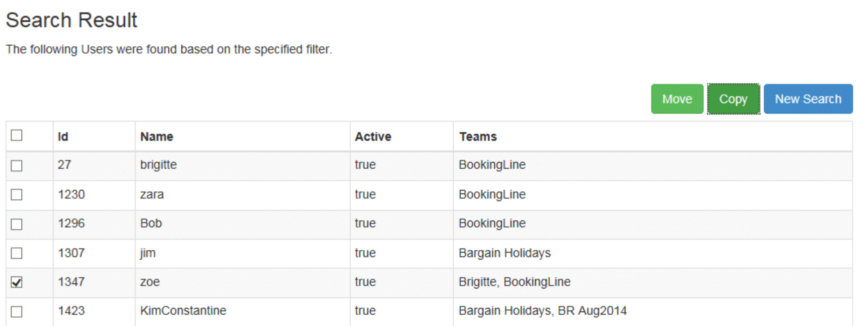
- Tick the checkbox next to the user(s) that you wish to move.
- Click the **Move** button at the top of the grid.
- In the ***Move User*** page, select the target team from the drop down list.
- Click the **Move** button at the bottom right of the dialog, to re-assign the agent to the selected team, or **Cancel** the action.



To copy users to a another team, in addition to their current team(s)

- Tick the checkbox next to the user(s) that you wish to copy.
- Click the **Copy** button at the top of the grid, to open the ***Copy User*** page.
- Select the target team from the drop down list and click **Copy** to add the agent to the selected team, or **Cancel,** to cancel the action**.**

The Search Result grid will update, listing the team(s) in which the users are now represented.



ACTIVE DIRECTORY INTEGRATION

If your system is ***Active Directory*** enabled you will have the ability to import users directly from your companies Active Directory.

Running with active directory integration enabled does change the behaviour of ***Synthesys User management*** as a lot of the management of users is managed outside of Synthesys.

Using active directory, the following functions in Synthesys are not available or affected:

Changing passwords Is no longer managed in Synthesys User management but via the windows change password mechanism.

Deactivating users This is no longer possible from within Synthesys. To deactivate a Synthesys user they must be removed from Active Directory.

Synthesys will periodically scan Active Directory for removed or deactivated users and will then deactivate them from within Synthesys.

Reactivating users This is no longer possible from within Synthesys. If a user with the same credentials (User name) is reactivated or recreated in Active Directory the following behaviour can be enabled within Synthesys when the user is reimported.

a. When the user is imported again Synthesys will reactivate the user
b. When the user is imported again a new user will be created.

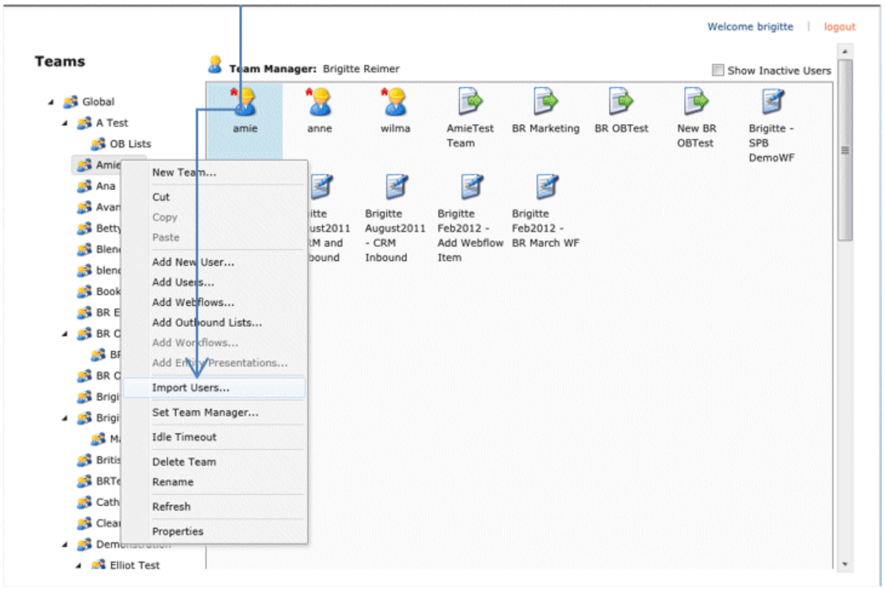
The behaviour described above is determined by the System administrators, only one of the above behaviours will be enabled.

Changing roles This is no longer possible in Synthesys. The roles of a user are determined by the import mechanism, as part of the original configuration, the Active Directory Security groups will be mapped to Synthesys user roles.

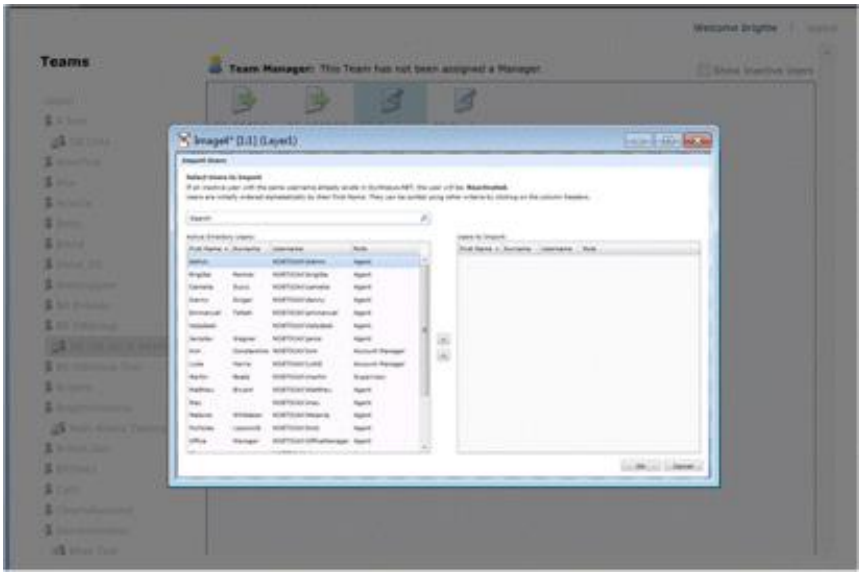
Importing Users from Active Directory

In order to import users from Active Directory

- Click the ***Teams*** tab at the top of the **Synthesys Management** screen.
- Select the ***Import Users*** option from the drop down menu.

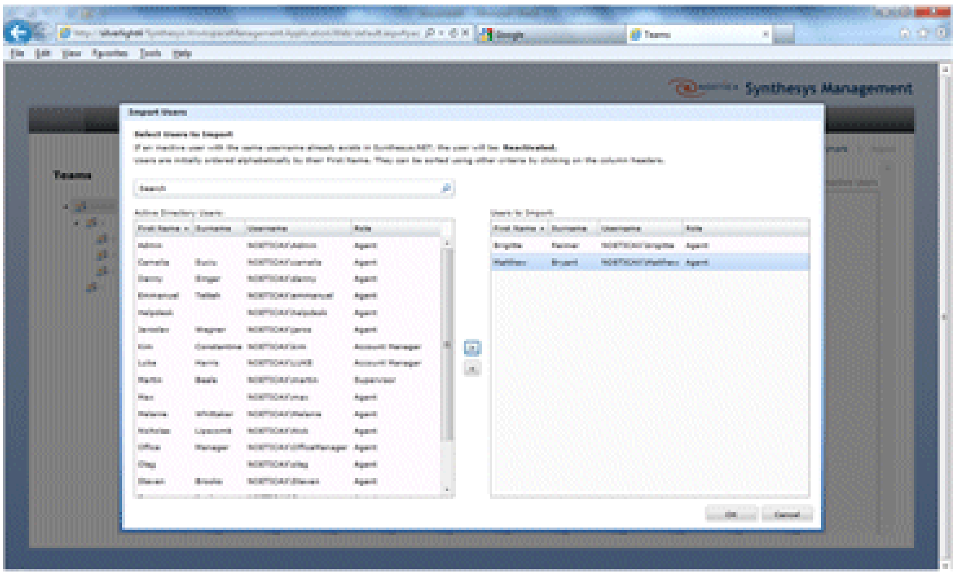


When selected, a list of available users will be shown. This may take up to 60 seconds to display whilst it is querying Active Directory.



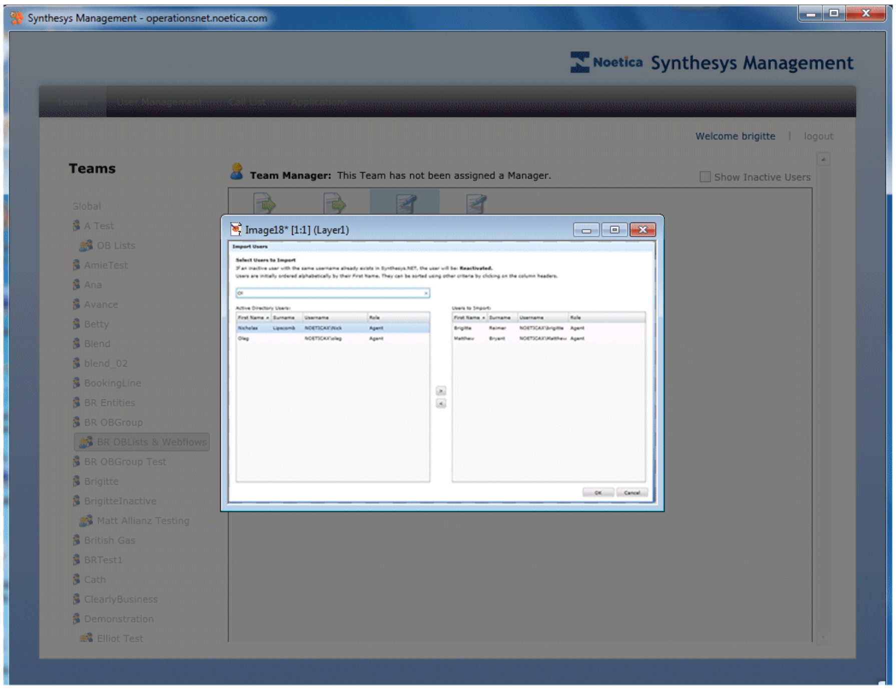
To import a user

- Select a user from the list and press the arrow to move the selected user into the ***Users to Import*** list



If you need to search for a user

- Enter the user's first name, surname or username in the search box to. The search will start automatically when the second letter is typed.



When you have added all the users that you wish to import into the ***Users to Import*** list

- Press ***OK*** to return to the team view, displaying the new users.