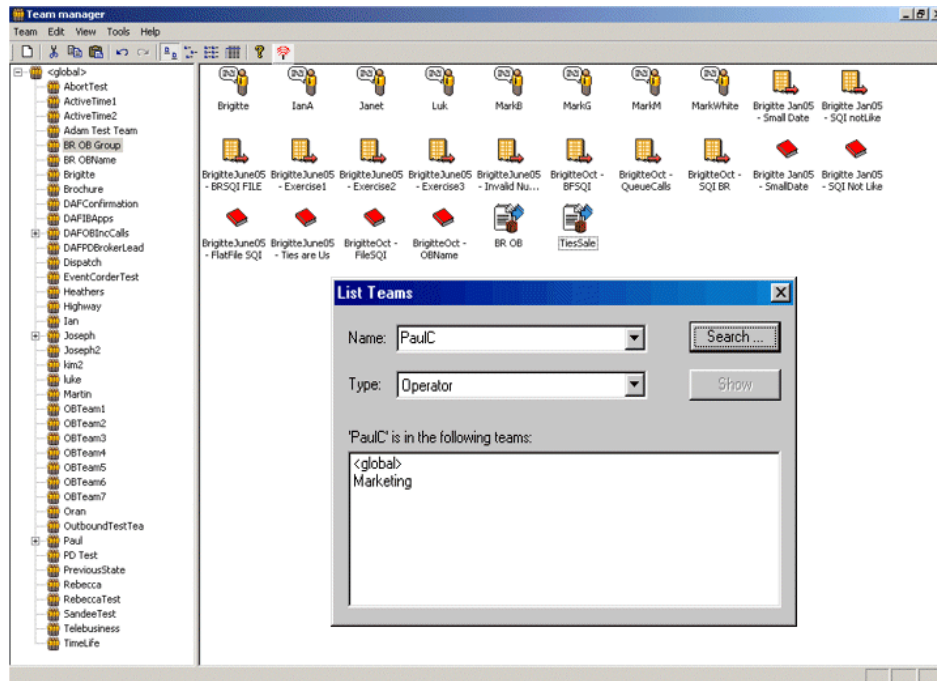


# SYNTHESYS TEAMS



## SYNTHESSYS MANAGING FUNCTIONS

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## 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*.

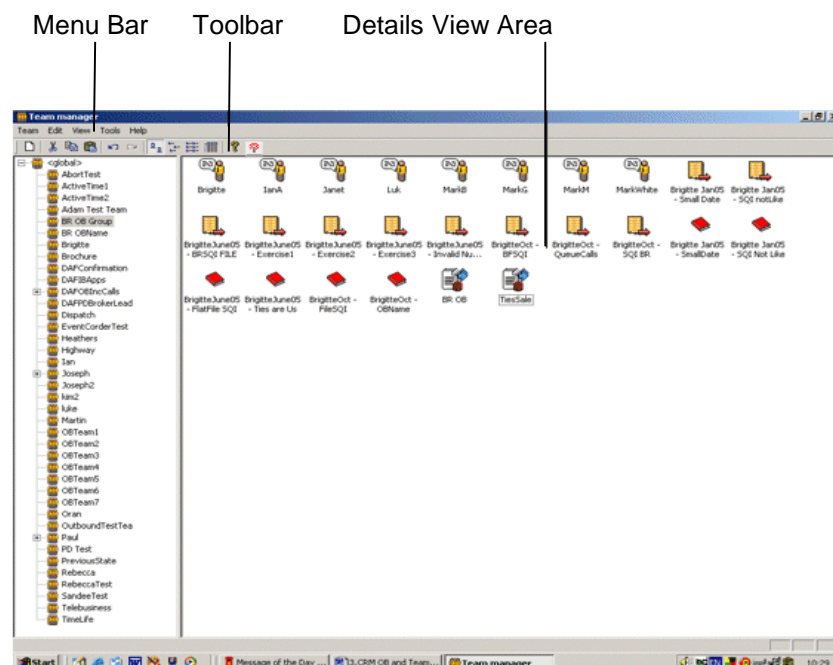
## Starting Synthesys Teams

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*.














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:



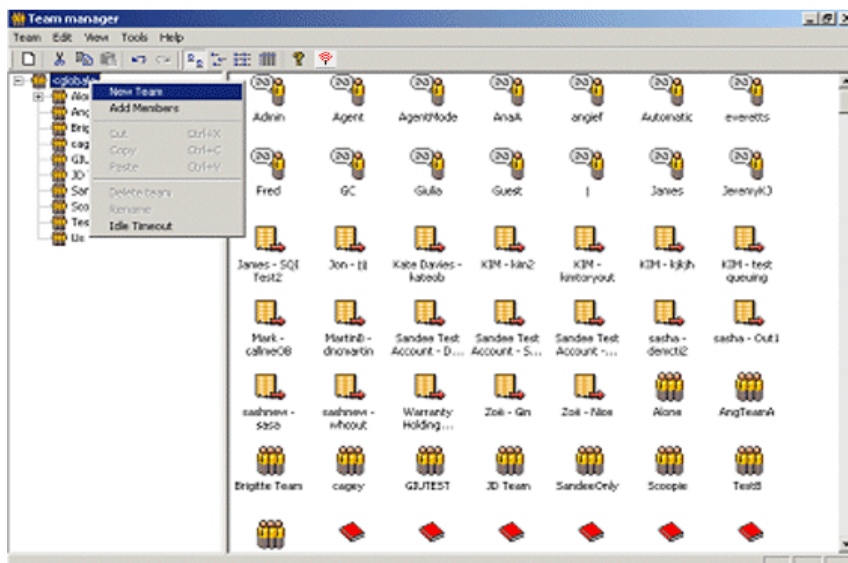
Icon	Used To
	Set up a new Team
	Cut the current selection and place it on the Windows Clipboard.
	Copy the current selection.
	Paste the contents of the Windows Clipboard into the current record at the cursor point.
	Undo and Redo the last action that was preformed on the system.
	Display teams, agents, 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.
	<b>Broadcast Teams Updates</b> 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.

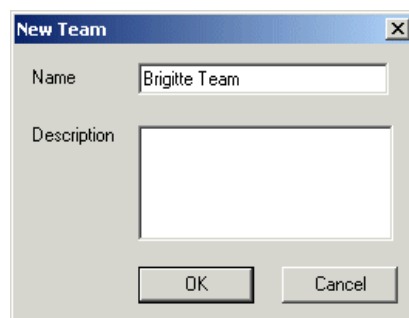
To set up a new team, initially under the global team and subsequently under any existing outer or inner teams:

- 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.*

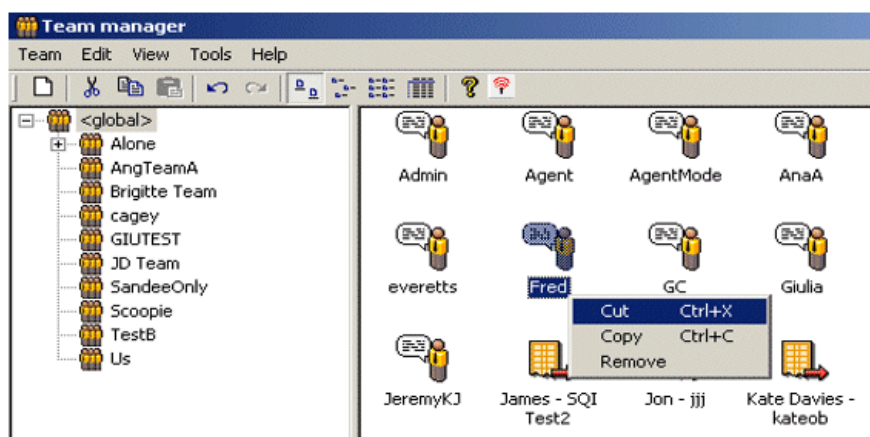
## Adding Agents and Outbound Lists to a Team

Use the *cut and paste* option, if you wish to assign specific agents, Outbound lists or Outbound groups to a team but do not 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.

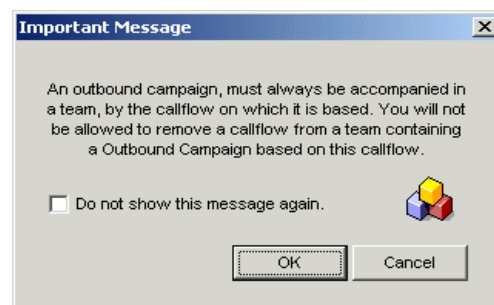


- Next, select the target team, right click and select **Paste** to paste the selected agents, Outbound lists and Outbound groups into that team.



*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.*

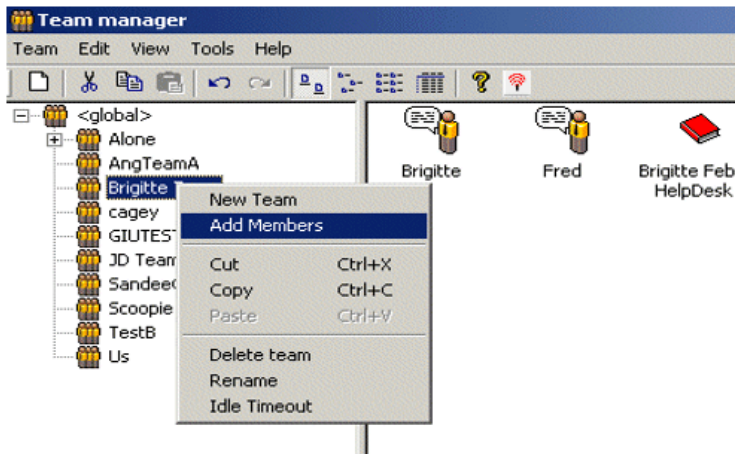


## Using copy and paste to add Members to a Team

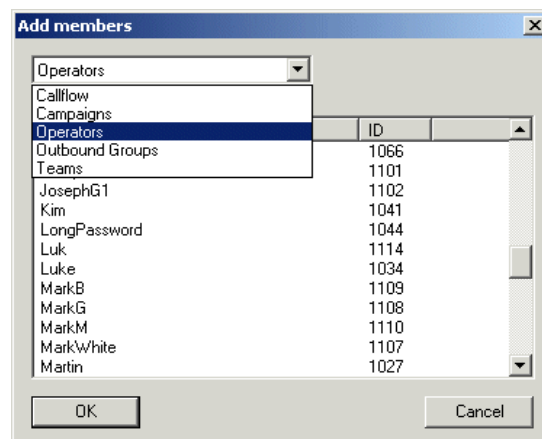
Use the **copy and paste**, **click and drag** or **Add Members** options, to assign specific agents, Inbound callflows, Outbound lists and Outbound groups to more than one team.

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.*




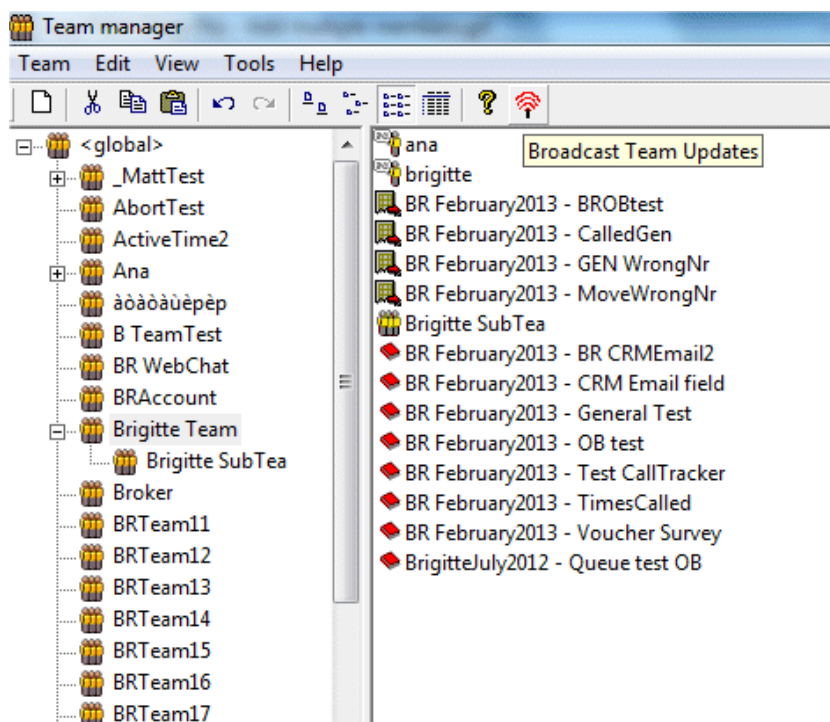
## Dynamic Team Changes

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 **Broadcast Teams Updates** 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 Updates** option

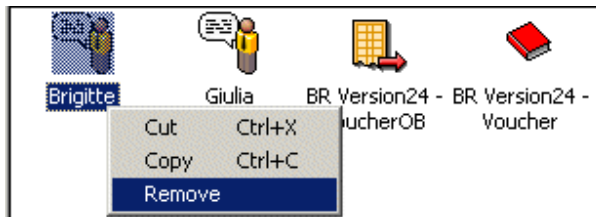
- In the Synthesys main screen, click on **Teams** under the **Manage** heading.
- Select your team and make the required changes, moving users, callflows and outbound lists.
- To broadcast the changes instantly, click the **BroadcastTeamsUpdates**  icon on the toolbar.
- Agents can now pick up any changes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



## 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.*

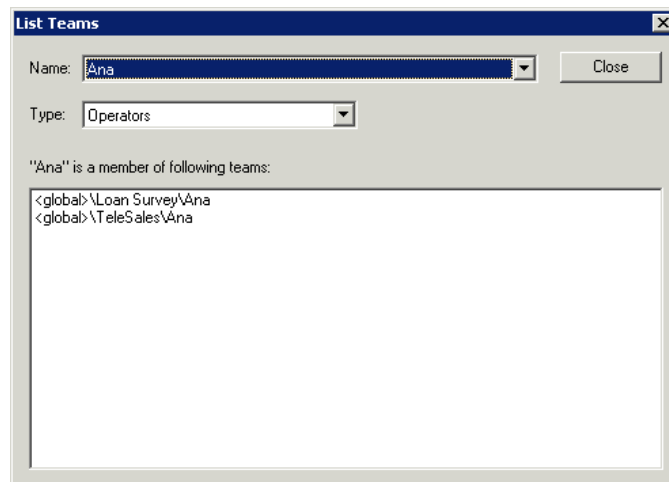
## Locating Team Members

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 bar 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 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***

<b>Option</b>	<b>Used To</b>
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***

<b>Option</b>	<b>Used To</b>
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***

<b>Option</b>	<b>Used To</b>
Toolbar	Display or hide the toolbar. A 'tick' next the option indicates that the toolbar is visible.
Status bar	
Large/small Icons, List Details	Display agents, Outbound lists, callflows, groups and teams in large or small size icons or in a list format
	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***

<b>Option</b>	<b>Used To</b>
List Teams	Locate the teams of which a specific <i>Operator, Outbound list, group, callflow or team</i> is a member.

### ***Help Pull Down Menu***

<b>Option</b>	<b>Used To</b>
About TeamMgr	Displays information about the version of the <i>Synthesys Team Manager</i> you are running.