

# SYSTEM MAINTENANCE

## Server Maintenance: Disk Space & Backups



### Performing Housekeeping

**Configure**

Frequency

Perform housekeeping:

☐ Every 5 Minutes

☒ Every 1 Days, at 03:40 (HH:MM)

☐ Only perform Housekeeping manually from Housekeeper menu

Tasks to Perform

<input checked="" type="checkbox"/> Delete Transaction files that are more than 7 days old	<input type="checkbox"/> Purge Lead Tracking records after 180 days
<input type="checkbox"/> Delete Phoenix Switch records that are more than 360 days old	<input type="checkbox"/> Clean Phoenix_WebService_Service records that are more than 30 days old
<input checked="" type="checkbox"/> Auto Archive Inactive Sequences (Calls)	<input type="checkbox"/> Delete orphan extra information special reschedule files
<input checked="" type="checkbox"/> Check Database and log results to HouseKeeper log	<input type="checkbox"/> Delete special reschedule files without Queue item
<input checked="" type="checkbox"/> Delete Report Run spool files (e.g. TIF files) that are more than 30 days old	<input type="checkbox"/> Delete Phoenix_Audit records that are more than 365 days old
<input checked="" type="checkbox"/> Delete E-mail files that are more than 730 days old	<input checked="" type="checkbox"/> Delete Phoenix_DoNotCall records that are more than 5 days old
<input checked="" type="checkbox"/> Delete log files that are more than 7 days old	
<input type="checkbox"/> Delete CTI_Audit records that are more than 300 days old	
<input type="checkbox"/> Delete Phoenix_Statistics records that are more than 300 days old	
<input type="checkbox"/> Delete Dial records only Limit 0 records, Chunk size 10000 records	
<input type="checkbox"/> Fix Phoenix_Statistics Campaign IDs records that are more than 30 days old	
<input type="checkbox"/> Delete Phoenix_Recycling records that are more than 300 days old	
<input type="checkbox"/> Delete Phoenix_Report_Run records that are more than 360 days old	
<input type="checkbox"/> Delete orphan queue records	
<input type="checkbox"/> Delete license usage records that are more than 12 months old	
<input type="checkbox"/> Delete LOTRAN files that are more than 30 days old	
<input type="checkbox"/> Change state of running calls after 30 days	
Change state of running call to Attention	

OK Cancel

### Deleting Campaigns & Accounts

**Campaign Manager**

File View Help

All Accounts

- ALL Allianz
- BKX Brigitte Example
- BTR Brigitte Training
- 7 01 City Breaks
- BR Scheduled SQI
- Add Schedule
- Report Runs
- Schedule No. 2
- 02 Sales Survey
- 03 Express Loan
- cjs garefhs
- cob Karen
- CRM Noetica Testing
- DTS Demonstration and Training Scrip
- EGT Emmanuel
- EUM Emily
- GET emmanuelk
- GGS carotol outbound
- Joe joetest
- Joe joetestp
- MIC Microsoft
- MON MONDIAL
- MRK MarkW
- NOE Noetica
- OS2 oBTest2
- ...

Report Properties

Report Name: Report Name ID: NONE

Comment: Any relevant comments

Full Name: Full name or report path (\\OperationsServer\Synthesys\Reports\NestReport.rpt) Browse Reports

Created Date: 14/03/2003

Report Tool: Crystal Service Format: CSV

Printer/Export File Name (e.g. %d%m%y for dated filenames): \\OperationsServer\Synthesys\Reports\NestReport.txt

Output Service

Output Tool: Email Service

Parameter1: From Address

Parameter2: To Address

Save Delete Edit Report

Ready

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Prepared by Kim Constantine & Brigitte Reimer

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## Introduction to Synthesys Maintenance

The following guide has been written as a step-by-step account of things to check on the Synthesys server(s) everyday. It also explains some of the Synthesys software unknowns, such as: 'What do the Synthesys Services do?'

Hopefully we will have cleared up some of the mysteries of Synthesys, how it runs and what tasks it performs in the way of its own housekeeping.

This guide should be used as a starting point for putting into place a long-term maintenance strategy, one that can be added to and developed as the system matures.

Should you have questions or problems with implementing any of the recommended maintenance jobs, please ring the Noetica Helpdesk.



## PART 1: SYNTHESYS SERVER MAINTENANCE MANUAL

Disk Space

Database Backups

Synthesys Backups

Check Size of Database

Checking for Errors on the Database

Checking for General Server Errors

Synthesys Control Program

Synthesys Core Services

Synthesys Errors



## Part 1: SYNTHESYS SERVER MAINTENANCE

Guide to Maintaining a Synthesys Call Centre Server:

### Disk Space

The first and main part of Synthesys maintenance is to make sure there is enough available disk space on the Synthesys server, system drive and the main Synthesys drive(s).

- The disk drives should be checked daily, probably best if this is done once in the morning and once in the evening, then the system administrator can get a good idea of how much space is being used by the system in a typical day.
- The system drive also needs to be kept clear but this is purely down to your own systems administrator.
- The main Synthesys folder on the application server needs backing up. In the event of complete server failure, Noetica can use this folder backup to re-install a new machine in a relatively short time, as long as the database backups are available as well.

A majority of space on the Synthesys drive is used by the transactions directory and any email storage folders that may exist on the main application server.

**The 'Transactions' directory** is cleaned by the Housekeeper regularly, the Housekeeper can be configured to clear any archived transaction files once they are over x days old (the default is 7 days) but this can be changed based on the disk constraints. If you are running out of space on the Synthesys Drive change the Housekeeper to delete archived files over 5 days old, this should give you some more space for a while, if this is not enough reduce it again to 3 days and so on, see **chapter on 'Housekeeping'** for more details.

Another way to free up space from the transaction directory is to change the 'auto-archive' option for some of your bigger campaigns. The **Auto-Archive option** is set per campaign and determines how long a call in the database remains Active/Inactive, before the Housekeeper changes it's state to Archive, the default for this is 30 days. While the call is kept active/inactive the system also retains the corresponding transaction file in 'transactions\done', so the call may be re-run in the Call Tracker if required. The Auto-Archive option is set via the panels in the Campaign Manager (refer to the **sections 'Housekeeping' & 'Campaign Manager'** for more information).

Setting the Auto-Archive period to a lower number of days will allow the Housekeeper to Auto-Archive a call, therefore moving the corresponding transaction files to the 'Transactions\Archive' directory where the Housekeeper is then able to delete it after a certain time period.

## Database Backups

The only way to protect your data from corruption or deletion, is to regularly backup the databases, at least once a day, probably more in a busy environment. You should backup the database at least daily and put the backup files in a separate location.

Database backups and maintenance are the responsibility of the customer not Noetica. Noetica can advise, if required, on how to set SQL Maintenance Plans at installation time, but make sure you understand which databases are being backed up and check the backups have run correctly every day.

***Please see Appendix for an example of a SQL Server 2008 Maintenance plan for the Noetica Phoenix and Phoneyx databases.***

In addition, a database restoration check should be performed on a regular basis.

The maintenance plan that performs the DB backups should also perform these other tasks:

- Check Database Integrity
- Shrink Database
- Reorganize Index
- Rebuild Index

These tasks will also stop fragmentation of indexes and check integrity of indexes to alleviate performance issues in the Noetica Databases.

## Synthesys Backups

A regular backup of the core Synthesys components should be performed, as well as the database backup described above. The Synthesys core directory that should be backed up at least daily is:

**\\server\Synthesys\.....**

The directories above contain the core Synthesys system on the Application server and will allow recovery of a damaged system.

Synthesys\Emails :- This directory stores all email files that have been entered into the Synthesys system via the Popwatch Service (if applicable). By its nature, this directory can become extremely large and should be dealt with by the backup procedures separately. This folder can also be configured to be stored on another machine.

## Check size of Database

Each database, both Phoenix and Phoneyx, have two files associated with them:

a database file (\*.mdf in SQL Server) and  
a transaction log file (\*.ldf in SQL Server).

Both these files will grow in size as the database grows with the accumulation of data from call data, queuing, CRM and any other look up type data held in the Phoenix/Phoneyx database.

**The Phoneyx database**, is where all scripts are first designed before they are released and all 'test run' calls taken in the Campaign Editor go to the Phoneyx database, The Phoneyx database is therefore usually very small, and there is really no administration to be done here.

**The Phoenix database** on the other hand stores everything the Phoneyx database does as well as all call data, CRM data, call queuing data, event data and any other data used for running the system. Therefore the Phoenix database needs regular administration to keep it clear of unnecessary information.

***There are several jobs that should be performed daily on the databases:***

- the deletion of any old campaigns, which will delete all call data
- the deletion of outbound campaigns, which will also clear the outbound queue
- the deletion of old CRM's and clearing of CRM history events, which will clear old customer data

*Old campaigns* are deleted in the Campaign Manager (Part3 of this document).  
*Old outbound campaigns* are deleted in the Outbound Manager, *CRM's and CRM histories* are deleted from within the Callflow Editor. (see Synthesys manual 'Setup Campaigns – Callflow Design and Outbound Management').

After any unwanted call data has been deleted from the database the next thing is to check the size of the database transaction log file.

**Database transaction log files** store all sql commands performed on a database and checkpoints, so obviously these files grow quite fast.

As part of the maintenance plan within SQL Server these log files should automatically truncate once a successful backup operation has taken place. There are occasions that SQL server does not reduce these files, therefore we strongly recommend these are monitored on a daily basis, as they can grow several GB's per day.

***Please see Appendix for an example of a SQL Server 2008 Maintenance plan for the Noetica Phoenix and Phoneyx databases.***

If you notice a problem, please contact Noetica Helpdesk immediately

## Checking for Errors on the Database

Daily the database logs should be checked for errors.

SQL Server : all major errors are displayed in the Event Viewer for Windows, as well as the SQL logs within SQL Enterprise Manager.

Again these tasks should be performed on a daily basis.

## Checking for General Server Errors

The Event Viewer logs for the Windows OS on the Synthesys server should be checked every morning; any problems with networks, licensing and other windows applications installed on the server will be recorded in here.

There are three type of errors that can be listed in the Event Viewer on the server:

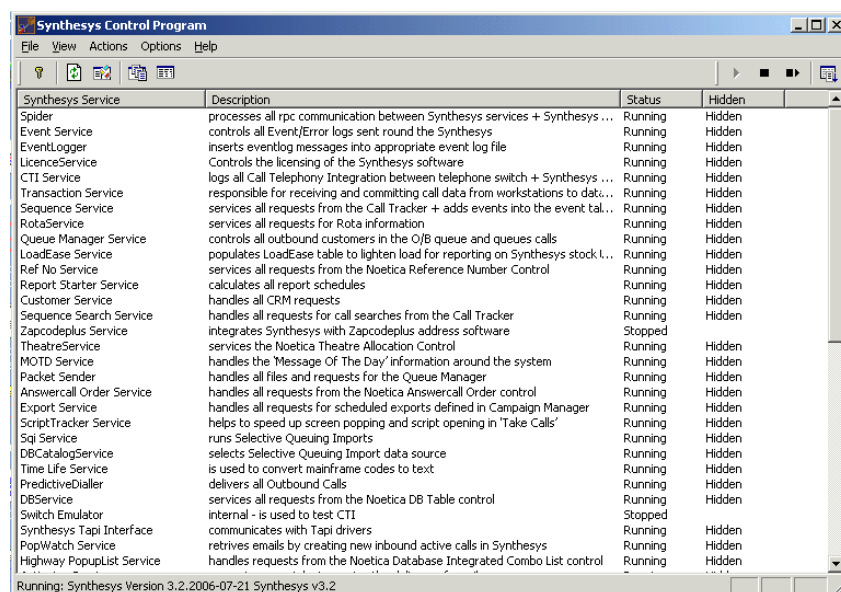
'system',  
'applications',  
'security'

All three of these should be checked daily and any major error reported to your Systems Administrator.

## Synthesys Control Program

Synthesys is a client/server modelled system, and this is implemented by a suite of programs running on the server, which services all Synthesys workstations.

This group of programs are the 'Synthesys Services'. All the Synthesys Services are controlled by one program, the Synthesys Control program. There will be a shortcut to the control program on your desktop normally called 'Synthesys Services' or the Synthesys Control Program can be run from a windows service. The Control program will look as below: -



Synthesys Service	Description	Status	Hidden
Spider	processes all rpc communication between Synthesys services + Synthesys ...	Running	Hidden
Event Service	controls all Event/Error logs sent round the Synthesys	Running	Hidden
EventLogger	inserts eventlog messages into appropriate event log file	Running	Hidden
LicenceService	Controls the licensing of the Synthesys software	Running	Hidden
CTI Service	logs all Call Telephony Integration between telephone switch + Synthesys ...	Running	Hidden
Transaction Service	responsible for receiving and committing call data from workstations to dat...	Running	Hidden
Sequence Service	services all requests from the Call Tracker + adds events into the event tal...	Running	Hidden
RotaService	services all requests for Rota information	Running	Hidden
Queue Manager Service	controls all outbound customers in the OJB queue and queues calls	Running	Hidden
LoadEase Service	populates LoadEase table to lighten load for reporting on Synthesys stock l...	Running	Hidden
Ref No Service	services all requests from the Noetica Reference Number Control	Running	Hidden
Report Starter Service	calculates all report schedules	Running	Hidden
Customer Service	handles all CRM requests	Running	Hidden
Sequence Search Service	handles all requests for call searches from the Call Tracker	Running	Hidden
Zapcodeplus Service	integrates Synthesys with Zapcodeplus address software	Stopped	Hidden
TheatreService	services the Noetica Theatre Allocation Control	Running	Hidden
MOTD Service	handles the 'Message Of The Day' information around the system	Running	Hidden
Packet Sender	handles all files and requests for the Queue Manager	Running	Hidden
Answercall Order Service	handles all requests from the Noetica Answercall Order control	Running	Hidden
Export Service	handles all requests for scheduled exports defined in Campaign Manager	Running	Hidden
ScriptTracker Service	helps to speed up screen popping and script opening in 'Take Calls'	Running	Hidden
Sql Service	runs Selective Queuing Imports	Running	Hidden
DBCatalogService	selects Selective Queuing Import data source	Running	Hidden
Time Life Service	is used to convert mainframe codes to text	Running	Hidden
PredictiveDialler	delivers all Outbound Calls	Running	Hidden
DBService	services all requests from the Noetica DB Table control	Running	Hidden
Switch Emulator	internal - is used to test CTI	Stopped	Hidden
Synthesys Tapi Interface	communicates with Tapi drivers	Running	Hidden
PopWatch Service	retrives emails by creating new inbound active calls in Synthesys	Running	Hidden
Highway PopuList Service	handles requests from the Noetica Database Integrated Combo List control	Running	Hidden

Running: Synthesys Version 3.2:2006-07-21: Synthesys v3.2

Along the left hand side of the Control program window is a list of all the Synthesys services running on your system, with a brief explanation in the *Description* column.

On the right side of the Control Program window are two columns, 'Status' and 'Hidden'. The Status column should display 'Running', as all services should be running at all times. If 'Stopped' is displayed in the Status column, there is a problem.

If a service is NOT running, try to start it. Right click on Stopped along side the service in the 'Status' column and select 'Start'. The service should launch automatically. To stop a service in the Control program, right click on the appropriate service in the list and select 'Stop' or if you want to stop and then immediately start the service again, click 'Restart' in the 'Status' column. Stopping services should only be done after checking with the Noetica Helpdesk.

The second column, the 'Hidden' column either hides or displays the window of the corresponding service. If you wish to view any processing done by a particular service, locate the service, right click on 'Hidden' and select 'Show'. To hide a service right click on 'Visible' and select 'Hide'. The services that are worth viewing are discussed in 'Synthesys Core Services'.

## Synthesys Core Services

The Synthesys Core Service and their purpose in the Synthesys system are:

**Spider** – This Service processes all rpc communication between the Synthesys Services and the Synthesys Clients; this is the heart of the system if this service is not running then the entire Call Centre is not working!

**Event Service** – This program controls all the Event/Error logs sent round the Synthesys software system, these can be information or errors, the format of Synthesys errors are explained later.

**Event Logger** – Inserts event log messages into the appropriate event log file.

**CTI Service** – This service logs all Call Telephony Integration between the telephone switch and the Synthesys workstations.

**CallLogger Service** – All calls and CTI actions have an entry in the Phoenix\_Statistics table and this is populated by the CallLogger service.

**Licence Service** – Controls the licensing of the Synthesys software.

**Live Monitor Service** - Performs database work for the live monitor, i.e. regularly retrieves statistics about campaigns and agents and does a Spider RPC Broadcast so that all Live Monitors pick up the latest information.

**Transaction Service** – this service is responsible for receiving and committing all call data from the workstations to the database. If this service is NOT running then all call data is stored temporarily on the local workstation machine. When the Transactions Service is back up and running again, the workstations are able to re-send the transactions. When the Transaction Handler is unhidden you can view the Service processing all transactions. This is useful if you need to check that the Transaction Handler is working. It will also show you any call transactions it fails to put into the database, which are stored in 'Transactions\BadTrans'. These bad call transactions can then be processed later by going to the Service Window, 'Main' from the tool bar, then 'Process Transaction File'. This will display a dialog of all the transactions in the Badtrans directory. Select one and hit 'open', to try and re-submit the transaction to the database. If this errors again, ring the Noetica Helpdesk.

**Sequence Service** – performed by different service threads (Main Sequence Service, Worker Sequence Service, Worker Sequence Service No 1) This program services all requests from the Call Tracker. Without this service running all Call Tracker programs on the workstations will be unable to operate. The Sequence service also adds all events into the event table and without this service no events will be added to any calls. This would include all events added in the Call Tracker and any reporting events added by the report starter service or any events added by the Unified Messaging System (UMS).

**Sequence Search Service** – handles all requests for call searches from the Call Tracker.

**Crystal Service** – this program runs all scheduled Crystal reports, these schedules are set up in the Campaign Manager.

**Impromptu Service** – this program runs all scheduled Impromptu reports, these schedules are set up in the Campaign Manager.

**GSCScheduler Service** - schedules global queue state changes

**Export Service** – handles all requests for scheduled exports defined in the Campaign Manager.

**Housekeeper** – This service is run to maintain the Synthesys software on the server. It 'auto archives' inactive/active calls in the database after a configured time period and also deletes archived transaction files after a configured number of days.

**HTML Email Service** –send html reports scheduled in the Campaign Manager.

**Live Monitor Service** – performs database work for the Live Monitor.

**LoadEase Service** – populates the LoadEase table. This table is used to lighten the load for reporting on the Synthesys stock tables.

**MOTD Service** – handles all the 'Message Of The Day' information around the system.

**Packet Sender Service** – handles all files and requests for the Queue Manager Service to manage outbound calling.

**Predictive Dialler** – delivers all Outbound Calls.

**Queue Manager Service** – this service controls all outbound customers to be called in the Outbound Queue, therefore if the Agents are pressing 'Get Next Record' in 'Take Calls' and calls are not appearing check this service running. This service is also responsible for queuing calls.

**Quota Service** - services the *Managing Quota* functionality

**Recycling** – Recycles calls from recycle scripts in the Outbound Manager.

**Report Starter Service** – this service calculates all report schedules. Once the reports scheduled have been calculated the services like the impromptu service pick up the schedule and then run the actual reports.

**Rota Service** – services all requests for Rota information, which can come from the 'Call Tracker', the 'Call Flow Editor' and the 'Take Calls' programs on the local Synthesys workstations.

**Script Tracker Service** – This Service helps in the caching of Scripts in the 'Take Calls' module, to make screen popping and script opening faster.

**Synthesys Exe Service** – runs when a schedule is presented. The exe service can run a specific program with parameters passed from the Report Starter Service, basically the Exe Service allows any other program to be run. For example when a call is taken on Synthesys, when the call is committed to the Synthesys database, a record of some kind may be needed in a different database. The Exe service can then run a specific program and take the 'Sequence ID' of that call as a parameter from the Report Starter Service and run a specially written program to put the data in this external database.

**Synthesys Email Service** – handles any report schedules that are to be emailed.

**Synthesys Fax Service** – handles any schedules for reports that are to be faxed.

**Synthesys Bulk SMS Service** – handles all bulk SMS requests.

**Synthesys Bulk Email Service** – handles any schedules for reports that are to be emailed.

**SQL Service** – Service for running Selective Queuing Imports.

**SQM Service** - Service for running the Synthesys Queue Monitor.

**DB Catalogs Service** – Selects Selective Queuing Import data source.

**Token Server** – stops duplicate queuing operations at the same time

The following services support addressing software:

**Matchcode Service** – integrates Synthesys with Matchcode Address software.

**QASPro** – integrates Synthesys with Quick Address Software.

**Zapcodeplus Service** - integrates Synthesys with Zapcodeplus Software.

The following services support standard and non standard features and Noetica ActiveX controls and are client specific.

Your system may, in addition, have extra custom services which are only relevant to your particular installation. Contact Noetica should you need an explanation of any of these services.

**Activator Service** – supports popwatch by staggering the delivery of emails.

**Answercall Order Service** – handles all requests from the Noetica Special Order control.

**ComboService** - services all requests from the Noetica Combo List control.

**Customer Service** – handles all CRM requests.

**Data Viewer Service** - handles all requests from the Noetica Data Viewer control.

**DB Service** – this program services all requests from the Noetica DB Table control.

**DoNotCall Service** - will run nightly, to check the *PHOENIX\_DoNotCallList* table for telephone numbers and then remove associated persons from the Outbound call list.

**Highway DBCombobox Service** - handles requests from the Noetica Integrated Combobox control.

**Media Service** – handles all requests from the Noetica Media control.

**Multi Search Service** – searches accross multiple CRMs

**Picture Service** – Service for Noetica Picture control.

**Popwatch Service** – monitors a designated email box and retrives the emails onto the Synthesys system by creating new inbound active calls.

**Postwatch Service** – handles requests from the Noetica Postwatch control.

**Ref No Service** – services all requests from the Noetica Reference Number Control.

**Datacash Service** - handles all requests from the Noetica Datacash control.

**Newsagent Nearest Service** - handles all requests from the Noetica Nearest Newsagent control.

**Theatre Service** – services the Theatre Allocation Control.

**UMS Service** - handles all requests from the UMS control.

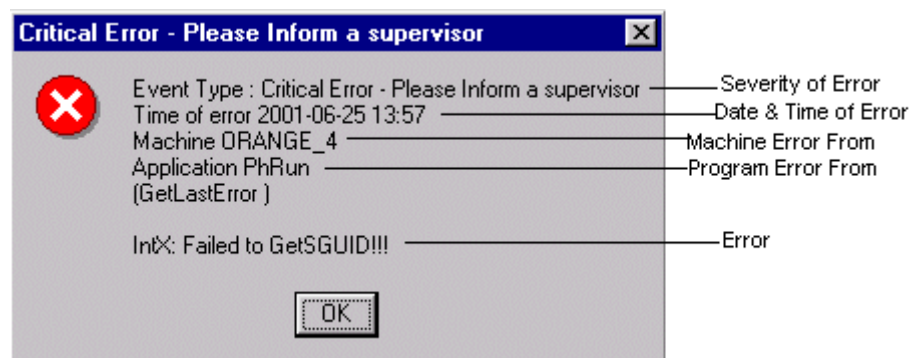
**UMS Email Service** - handles all email requests from the UMS control.

**UMSServiceX** - handles all requests from the UMS control.

**UMS WIN SMS Service** – Dispatches SMS Messages to WIN

## Synthesys Errors

If a problem occurs in the Synthesys software an error message will appear on the Server and, depending on the severity, on the workstations as well. Depending on the type of error, the error messages will appear as below: -



The error messages show severity, data and time, machine of origin, program of origin and finally the error. When reporting errors to the Noetica Helpdesk you **MUST** have all this information in order for the problem to be logged. Ringing the Helpdesk and saying an error message has appeared on a machine is not informative enough.

## Running the Housekeeper

See the Housekeeping section of this document for information on how to configure the Synthesys system to self clear regularly. The Housekeeper should be configured to run once a day in the middle of the night when the Call Centre should be at it's quietest.

## Running the Outbound Manager

See the Outbound Manager section of the CRM, Outbound Manager & Teams manual for information on deleting old outbound campaigns.

## Running the Campaign Manager

See the Campaign Manager section of this document for information on deleting old campaigns from the database.

## The Daily Maintenance Check List for Synthesys

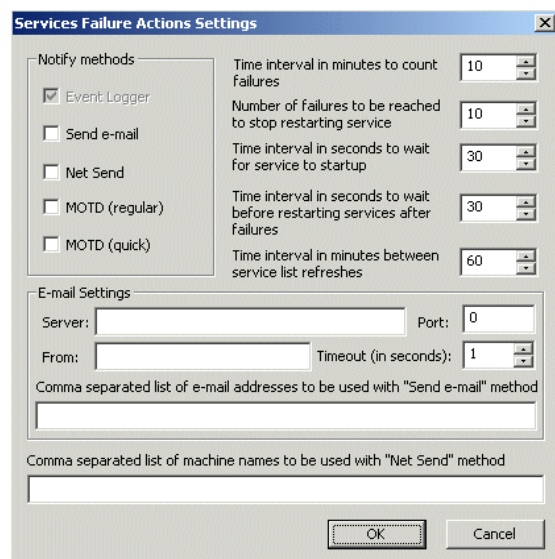
- Check overnight database backups have worked.
- Check overnight core Synthesys backups have worked.
- Check available disk space on the main Synthesys drive.
- Check disk space on the main System drive on the Synthesys Server.
- Delete any old/finished outbound campaigns from the Database and Synthesys file system via the Outbound Manager.
- Delete any old/finished campaigns from the Database and the Synthesys file system via the Campaign Manager.
- Check size of database and database transaction log files, if log files are bigger than 500m truncate them.
- Check Server Operating System for errors via Event Viewer and SQL Server logs.
- Check Database for errors as previously described.
- Dissect any Synthesys errors as already described above and report to the Noetica Helpdesk as required with appropriate screen shots.
- Check all Synthesys services are running.
- Check the Housekeeper has run by checking there are no transactions in 'Archive' greater than the configured number of days (default 7 days).

**N.B Under no circumstances should any deletion of files/Database tables take place outside of the Synthesys maintenance modules. Nor should anything be deleted directly from the DB.**

## Service Failure Notification

Via the 'Services Failure Actions Settings' users can notify their Synthesys System Administrator about any failures that occur.

To open the '**Services Failure Actions Settings**' dialog, go to **Options - Settings** on the menu bar in the **Synthesys Control Programme**.



**Services Failure Actions Settings**

Notify methods

- ☒ Event Logger
- ☐ Send e-mail
- ☐ Net Send
- ☐ MOTD (regular)
- ☐ MOTD (quick)

Time interval in minutes to count failures: 10

Number of failures to be reached to stop restarting service: 10

Time interval in seconds to wait for service to startup: 30

Time interval in seconds to wait before restarting services after failures: 30

Time interval in minutes between service list refreshes: 60

E-mail Settings

Server: Port: 0

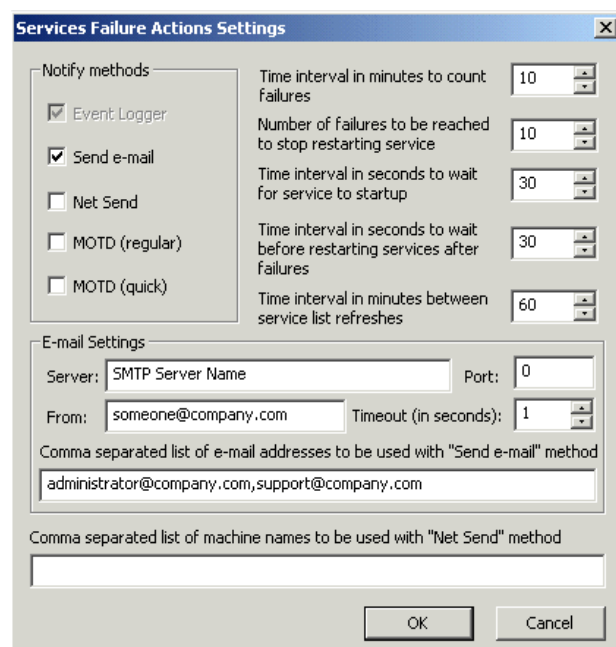
From: Timeout (in seconds): 1

Comma separated list of e-mail addresses to be used with "Send e-mail" method

Comma separated list of machine names to be used with "Net Send" method

OK Cancel

In the **Services Failure Actions Settings** window you can change the default settings associated with failures and service start up, select the notify method and if selecting *Send e-mail*, enter the relevant details in the *E-mail Settings* sections.



**Services Failure Actions Settings**

Notify methods

- ☒ Event Logger
- ☒ Send e-mail
- ☐ Net Send
- ☐ MOTD (regular)
- ☐ MOTD (quick)

Time interval in minutes to count failures: 10

Number of failures to be reached to stop restarting service: 10

Time interval in seconds to wait for service to startup: 30

Time interval in seconds to wait before restarting services after failures: 30

Time interval in minutes between service list refreshes: 60

E-mail Settings

Server: SMTP Server Name Port: 0

From: someone@company.com Timeout (in seconds): 1

Comma separated list of e-mail addresses to be used with "Send e-mail" method

administrator@company.com,support@company.com

Comma separated list of machine names to be used with "Net Send" method

OK Cancel

If selecting **Net Send**, enter the relevant machine names (machine1,machine2, etc) in the field under '**Net Send**'

## PART 2: SYNTHESYS HOUSEKEEPING

Housekeeper Service

Housekeeper Configuration

Tasks to Perform

Performing Housekeeping  
Tasks  
Immediately

Services Failure Notification to  
System Administrator

## PART 2: SYNTHESYS HOUSEKEEPING

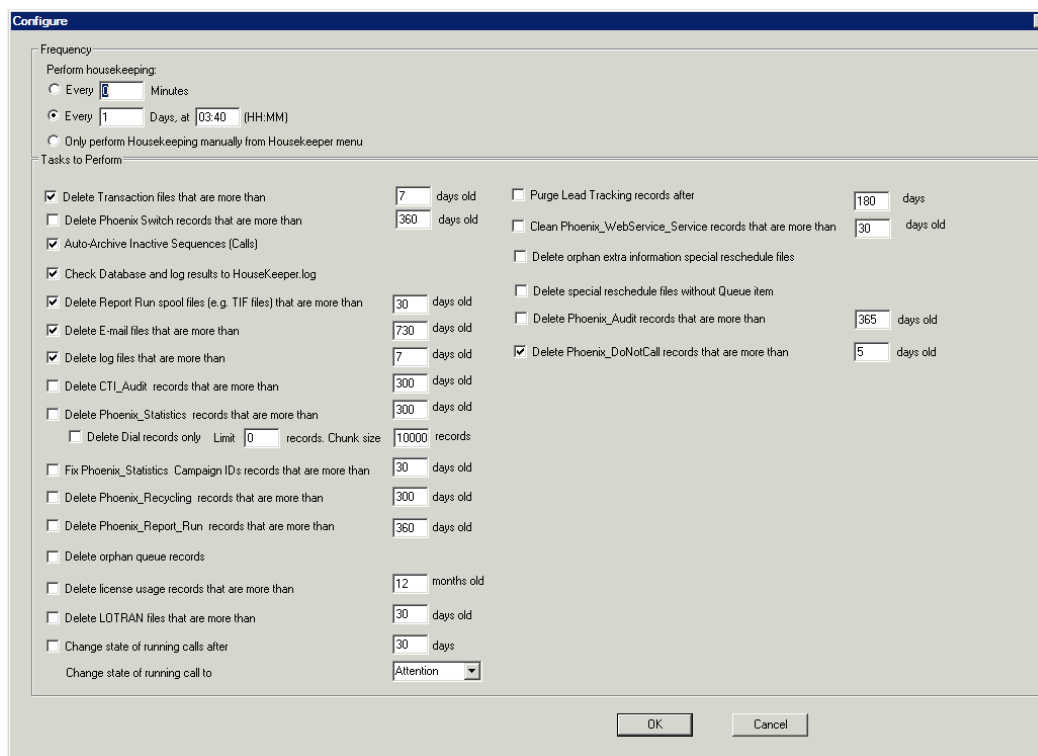
### **Housekeeper Service**

The Housekeeper is a constantly running Synthesys Service that manages Synthesys files and parts of the Synthesys database. The Housekeeper is responsible for system maintenance that can be performed automatically.

Users can configure the Housekeeper to perform only the tasks that are needed, and also the times when the Housekeeper is to perform the tasks.

## HouseKeeper Configuration

Selecting 'Tool>Configure' from the menu in the Housekeeper window displays the dialog below:



## Frequency

The Housekeeping functions can be set to run either:

- Every number of minutes between 60 and 1000. E.g. Every 60 minutes will run the tasks once per hour.
- Every number of days at a specified time of day. E.g.: Every 2 days at 23:00.

Or

- Manually only. The Housekeeper will not perform any task until it is manually selected from the menu.

## Tasks to Perform

The Housekeeper can be set to automatically perform all, none or some of the functions below, depending on whether or not the option is ticked.

The Housekeeper is set to automatically rename spi files, if they get to a certain size, 4MB, as 'toolong.spi' after it has run the nightly checks.

Any files that are in the SpecialReschedule directory but are not listed in the Phoenix\_SpecialQueue Table will automatically be removed, when the Housekeeper is running.

To delete files or records, please specify the number of days.

1. [Delete Transaction Files \\_\\_\\_\\_\\_](#)
2. [Delete Phoenix Switch Records \\_\\_\\_\\_\\_](#)
3. [Auto-Archive Inactive Sequences](#)
4. [Perform Database Checking \\_\\_\\_\\_\\_](#)
5. [Delete Report Run Spool Files](#)
6. [Delete E-mail Files](#)
7. [Delete Spam Files](#)
8. [Delete log files](#)
9. [Delete CTI Audit records](#)
10. [Delete Phoenix Statistics records](#)  
[\\_\\_\\_\\_\\_ Delete Dial records only](#)
11. [Fix Phoenix Statistics Campaign IDs records](#)
12. [Delete Phoenix Recycling records](#)
13. [Delete Phoenix Report Run records](#)
14. [Delete orphan queue records](#)
15. [Delete license usage records](#)
16. [Delete LOTRAN files](#)
17. [Change state of running calls](#)
18. [Purge Lead Tracking records](#)
19. [Clean Phoenix WebService Service records](#)
20. [Delete special reschedule files without Queue item](#)
21. [Delete Phoenix Audit records](#)
22. [Delete Phoenix DoNotCall records](#)

## 1. Delete Transaction Files

Every Call taken using Synthesys creates a file containing information about the call. These transaction files are only used when Active calls are re-run and as a historical record separate from the database. The Call data has already been added to the database so these files serve no other purpose and are deleted once they reach a certain age.

**'Purge Transaction files'**, i.e. delete transaction files from Server that are older than a certain date. The conditions for this are that:

The status of the Call is 'Archive'. (Every Call, or Sequence, in the database has a status of either 'Active', 'Inactive', or 'Archive')

The Call is older than the 'Auto\_Purge' period for the Campaign to which it belongs.

The Auto-Purge period (in days) is set when the Campaign is created by the Call-Flow Editor and can be changed using the Campaign Manager.

## 2. Delete Phoenix Switch Records

Used to clean Phoenix\_Switch\_Recoding and Phoenix\_Switch\_Billing, by removing records which are older than specified interval. By default, the cleaning is disabled, and records are deleted from the tables which are more than 360 days old. The task can be scheduled or run manually, from the File menu of the Housekeeper.

## 3. Archive Inactive Sequences

**'Archive Inactive Sequences'** i.e. set status of Inactive calls to Archive if they are older than their Campaign's 'Inactive Period'.

This function changes the status of 'Inactive' Calls to 'Archive' for calls that are over a certain age.

Call-flows that use the Call Tracker usually remain Active once the initial Call has ended. These Calls can be archived manually from the Call Tracker, but those that are not are automatically set to Archive by the Housekeeper.

The number of hours that an 'Inactive' call will remain as Inactive before its status is automatically changed to 'Archive' by the Housekeeper is known the 'Inactive Period' When a Call-Flow is created the user chooses the 'Inactive Period' for the Call-Flow. The 'Inactive Period' can also be changed using the Campaign Manager.

Only calls that have been Inactive for longer than the 'Inactive Period' will have their status changed to 'Archive'.

## 4. Perform Database Checking

**'Perform Database Checking'** i.e. check that Phoenix and Phoneyx database tables contain no errors.

The Housekeeper checks the validity of database tables. The results of these checks are logged to the screen and to Housekeeper.log. Things that are checked, and logged to housekeeper.log are:

- That Every SequenceID (Phoenix\_Sequence table) has an Event (phoenix\_event table)
- Every user (Phoenix\_User )has a person (Phoenix\_Person)
- Date field values in Sequence & Event are valid i.e. not(too far) in future
- Call\_Results for released scripts are the same in Phoenix & Phoneyx databases
- Script files exist for every Campaign (in Scripts folder) and are bigger than 0K in size
- The number of calls in main tables equals the number of productive sequences for that Campaign

## 5. Delete Report Run Spool files

**'Delete spool files'** i.e. delete files created by Report Services that are over a certain age. Currently this only purges files for Impromptu Service, Exe Service, Email Service, Fax Service, and Crystal Service.

Deletes files from the 'Output file folder' for each of the following report tools:

Impromptu Service  
Exe Service  
Email Service  
Fax Service  
Crystal Service

The folders are set up in the Campaign Manager and are used to hold files created by reports, e.g. attachment files for emailing etc.

The Housekeeper checks that the folder exists (folder paths should be set up using the full network path) and will delete any files in the folder that are older than the period set up in the configuration dialog above.

If the path does not exist or does not contain a 'spool' folder in the path, no files will be deleted. The path must include 'spool' as a precaution against the deleting of the wrong files by accident. The path, for example, should be: [\\server\d\synthesys\spool](#).

## 6. Delete E-mail Files

This option allows you to delete E-mail files entering the Synthesys system via 'Popwatch' once they are over a certain number of days old.

## 7. Delete Spam Files

Popwatch integrates with your inhouse Email system. Any E-mail classed as Spam by your Email system can be deleted (providing your email system has this function), once they are over a certain number of days old.

## 8. Delete log files

This option clears up Eventlogs, where the log file has a modified date which is over a specified number of days old, including old CRM service logs, old PD logs, old CTI logs, etc

## 9. Delete CTI\_Audit records

This option allows you to clean up the CTI\_Audit table by configuring in the Housekeeper which records to keep, based on time, ie delete entries over x days old.

## 10. Delete Phoenix\_Statistics records

The option '**Delete Phoenix\_Statistics records that are more than**' in the Housekeeper has been changed from deleting selected dialler events only, to deleting **all records** from before a certain date from **Phoenix\_Statistics**. This however has no effect on any other tables.



**TO KEEP THE OLD BEHAVIOUR** which only deletes Dial Events older than x days, ensure that you go into the Housekeeper Config Dialog and **tick** the '**DELETE DIAL RECORDS ONLY**' sub tick box under the Delete Phoenix\_Statistics records....

Please see next page for more information.

## 10. Delete Phoenix\_Statistics records continued...

### Delete Dial records only

As some client reports may rely on the previous behaviour of *Delete Phoenix\_Statistics records....* , a new option **Delete Dial records only** has been added as a sub tick box under 'Delete Phoenix\_Statistics records....'

**Delete Dial records only** clears only *Dial events* before the specified time, i.e. users can configure the Housekeeper to delete none call specific entries in the Phoenix\_Statistics table, which are mostly Predictive and Runner Dial events. Basically any records without a Sequence\_id greater than the specified time period can be deleted.



*Dialling events are defined as events corresponding to dialling out, either by Take Calls or by Predictive Dialler. In the Phoenix\_Statistics table, such records have field EventID equal to 'Runner Dial' or 'Predictive Dialler' respectively. Also, the records with field Sequence\_ID equal to 0 are considered to be dialling event records.*

**The default for this will NOT be set. The default behaviour is to delete all records for before a certain date from Phoenix\_Statistics .**

## 11. Fix Phoenix\_Statistics Campaign IDs records

Allows users to specify the number of days (determined by the EventTime field of the Phoenix\_Statistics table) after which the records in the Phoenix\_Statistics table, with a Campaign\_ID equal to 0 are updated, setting the Campaign\_ID from the corresponding records in the table Phoenix\_Sequence.

## 12. Delete Phoenix\_Recycling records

This option allows you to remove any recycled records from the Phoenix\_Recycling table, where the recycled date is older than the specified number of days. It is recommended that the default period is set to 150 days.

## 13. Delete Phoenix\_Report\_Run records

This option allows you to clean up the Phoenix\_Report\_Run table, removing records that are more than a specified number of days old. The default period is set to 10 days.

## **14. Delete orphan queue records**

This option allows you to delete orphan records, i.e. records without a Customer ID, from the Phoenix\_Queue table.

## **15. Delete license usage records**

Deletes the records from the Phoenix\_License\_Audit table with a Timestamp field ( i.e. the last date the license for the record is used), if this is less than the current date, depending on the specified number of days.

## **16. Delete LOTRAN files**

The LOTRAN folder contains auditing files for the LoadEase Service.

To ensure that this folder does not grow beyond a certain size, the files with extensions .ttl and .lea are deleted from the directory Synthesys\Transactions\lotran if they are more than the specified number of days old.

## **17. Change state of running calls**

This option allows you to specify the number of days (with a minimum of (1) and a maximum of (30) days, after which the state of Running calls will be changed to either 'Attention', 'Queued', 'Sleeping' or 'Done'.

The state that calls in a Running state should be changed to, is selected from a dropdown box. The Default setting is [30] days and 'Attention'.

## **18. Purge Lead Tracking records**

Removes records from the phoenix\_lead and phoenix\_lead\_tracking tables if they are no longer required. The default purge period is set to 180 days.

## **19. Clean Phoenix\_WebService\_Service records**

This option allows the clean up the Phoenix\_WebService\_Service table, removing records that are more than a specified number of days old. The default period is set to 30 days.

## **20. Delete special reschedule files without Queue item**

Used to remove files from the folder Synthesys\Transactions\SpecialReschedule which refer to non existing Phoenix\_Queue items. Has no configuration. Also Extra Info files in that directory which have no corresponding Special Reschedule files can be removed. Task can run both as part of House Keeping job and manually, from menu.

## **21. Delete Phoenix\_Audit records**

The Phoenix\_Audit table contains information about changes made to the rota table when creating new rotas, or editing existing rota details.

This option allows you to clean up the Phoenix\_Audit table, removing records that are more than a specified number of days old. The default period is set to 365 days.

## **22. Delete Phoenix\_DoNotCall records**

This option allows users to delete expired records from the Phoenix\_DoNotCall table, if they have expired for more than the specified number of days.

The default setting is to delete records only if they have expired for more than 30 days. Users can however override this setting, entering the number of days, as required.

## Performing HouseKeeping Tasks Immediately

Any of the functions described above can be invoked directly from the menu, by selecting File and:

- Archive Inactive Calls Now
- Purge Transaction Files Now
- Check Database Now
- Delete Spool Files Now
- Delete Email Files Now
- Delete Log files now
- Clean up CTI\_Audit now
- Clean up Phoenix\_Statistics now
- Clean up Phoenix\_Recycling now
- Clean up Phoenix\_Report\_Run records
- Fix Phoenix\_Statistics Campaign IDs now
- Clean up license usage table now
- Purge LOTRAN files Now
- Change state of the calls running for too long now
- Clean Phoenix\_Switch table now
- Phoenix\_Web\_Service\_Service records now
- Delete special reschedule files without Queue item
- Delete Phoenix\_Audit records
- Delete Phoenix\_DoNotCall records

## Email to Synthesys System Administrator

**Bad Transactions:** The Housekeeper now is configured, to check if there are any bad transactions. If badtrans are found, an email (manual or scheduled) will be send to your Synthesys System Administrator. The email address can be defined in the Synthesys.inf. file.

**Recycling Files:** The Housekeeper will now check for any Recycling files that have not been processed. If unprocessed Recycling files are found, an email (manual or scheduled) will be send to your Synthesys System Administrator. The email address can be defined in the Synthesys.inf. file.

**CallLogger files:** The Housekeeper will now check for any CallLogger files that have not been processed, ie any \*.blk files that do not have today's date as a creation date. , If unprocessed CallLogger files are found, an email (manual or scheduled) will be send to your Synthesys System Administrator. The email address can be defined in the Synthesys.inf. file.



## PART 3: SYNTHESYS CAMPAIGN MANAGER

Renaming Accounts & Campaigns

Re-setting a Synthesys Session

Assign Telephone Numbers to  
Campaigns

Remove Intermediate Versions

Deleting Accounts

Deleting Campaigns

Deleting Reports & Schedules

## PART 3: SYNTHESYS CAMPAIGN MANAGER

### Managing Accounts and Campaigns

The Campaign Manager shows a tree structure of all the accounts and campaigns created and released in the Campaign Editor.

In the Campaign Manager you can rename and delete accounts & campaigns, reset sessions, add and schedule reports and view report run histories and delete reports and report schedules. For more information about managing reports from the Campaign Manager, please refer to 'Creating and Managing Reports'

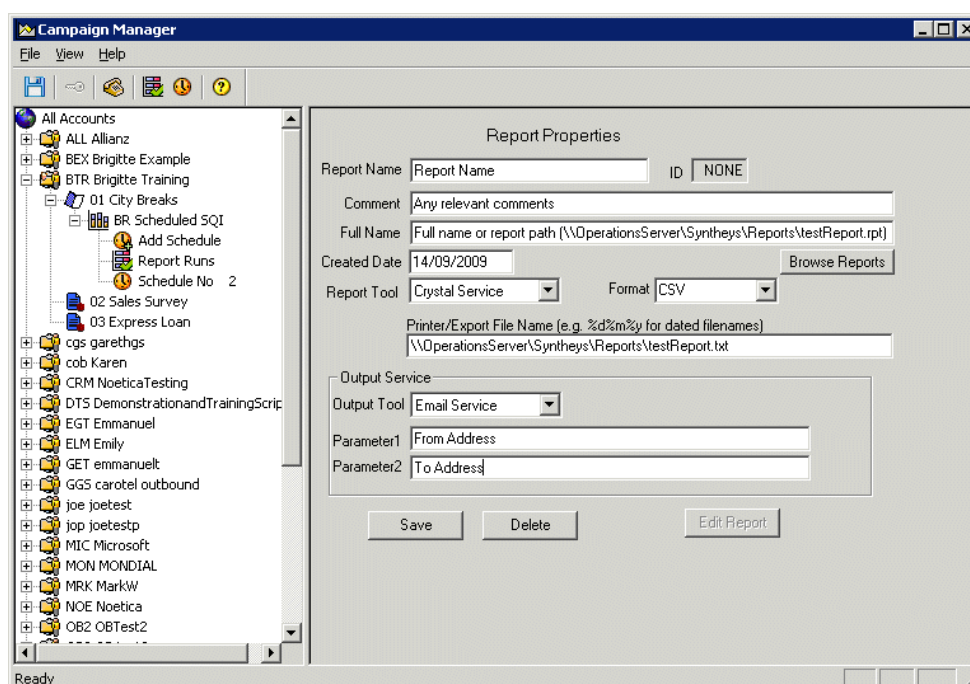
N.B. A 'Campaign' is synonymous with a 'CallFlow' in that a campaign always has one callflow associated with it. This document uses the term 'Campaign' rather than 'CallFlow'.

To start the Campaign Manager, click on **Reports** under the **Setup** heading of the Synthesys main screen..

## Renaming Accounts and Campaigns

In the Campaign Manager:

- Expand the **All Accounts** icon and select the account or campaign you want to rename. Account or Campaign details will be displayed on the right-hand side of your screen.
- Put your cursor into the *Account* or *Campaign Name* field and edit as required.
- Click **Save** to commit the changes. You will see that your account or campaign listed on the left-hand side has been renamed.



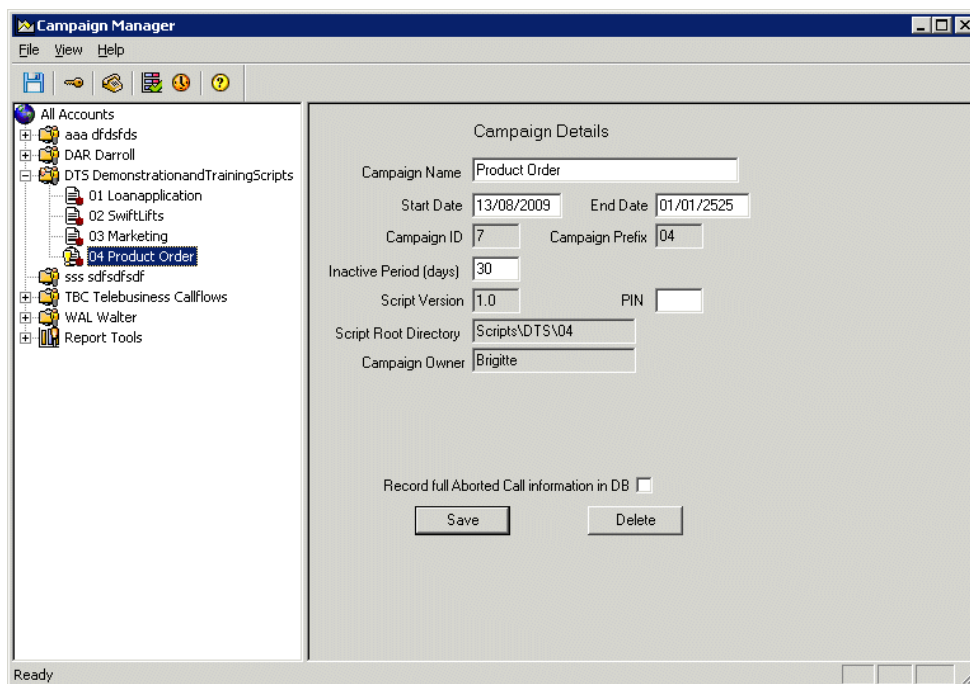
The account or campaign you have renamed will now be displayed with its new name in the *Select a Callflow* dialog of the Campaign Editor and in the Agent module.

## Auto Archive Option

The number of hours that an **Inactive** call will remain as inactive before its status is automatically changed to 'Archive' by the Housekeeper is known as **Inactive Period**.

When a callflow is created the user chooses the 'Inactive Period' for the callflow. The 'Inactive Period' can also be changed using the Campaign Manager.

The default setting for the 'Inactive Period' is 30 days but this can be reduced as required.



The screenshot shows the 'Campaign Manager' application window. On the left is a tree view of accounts and callflows. The 'Product Order' callflow is selected. The main area displays the 'Campaign Details' form with the following fields:

Campaign Details	
Campaign Name	Product Order
Start Date	13/08/2009
End Date	01/01/2525
Campaign ID	7
Campaign Prefix	04
Inactive Period (days)	30
Script Version	1.0
PIN	
Script Root Directory	Scripts\DTTS\04
Campaign Owner	Brigitte
Record full Aborted Call information in DB <input type="checkbox"/>	
<input type="button" value="Save"/> <input type="button" value="Delete"/>	

The status bar at the bottom left shows 'Ready'.

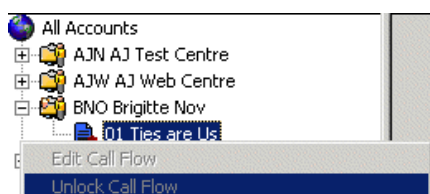
Only calls that have been inactive for longer than the 'Inactive Period' will have their status changed to 'Archive'.

## Re-Setting A Synthesys Session

If you exit from the *Synthesys Campaign Editor* using non-standard methods, such as **Ctrl+Alt+Del**, or through a system crash, your user account will normally be reset automatically and on accessing the system a message **Recovered Phoenix Session** will be displayed.

Sometimes however you need to reset your session manually in the Campaign Manager.

- Expand the **All Accounts** icon to display the list of your Accounts.
- Next, select the **Account** and **Campaign** for which you need to reset the session.
- **Right click** on the Campaign and click **Unlock Call Flow**.



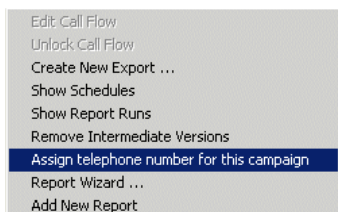
The session is now reset and you will be able to access the Synthesys Modules without receiving any error messages regarding invalid sessions.

Information about the **campaign\_owner**, i.e the person who has the script open (or who had it open when they crashed) is logged in the 'Phoneyx' database, with a reference in phoenix\_session, which records the username, machine name etc.

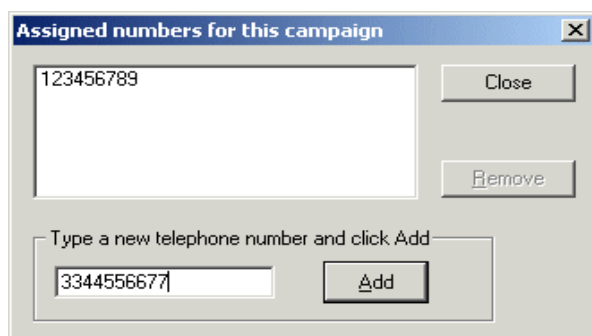
## Assign Telephone Numbers to Campaigns

Assigning telephone numbers to campaigns allows calls for a campaign to be routed to the available agent(s), automatically displaying the appropriate callflow.

- To assign a DDI (Direct Dial In) number to the campaign in the Campaign Manager, Right click on the relevant campaign and select *Assign telephone numbers to this Ccampaign*.



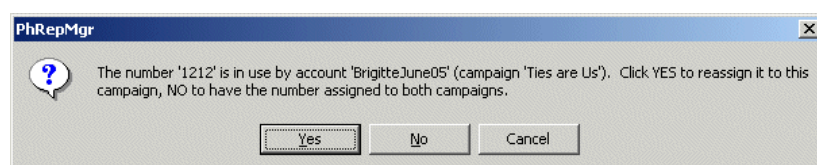
- In the *Assigned numbers for this campaign* dialog enter the DDI number in the *Type a new telephone number field* click the *Add* button and then *Close* to exit the dialog.
- To remove a DDI number, select the number and click the *Remove* button.



It is possible for one campaign to have more than one dial in number and it is also possible for several campaigns to share an incoming line.

If the telephone number to be added is already used in another campaign, a message will be displayed and you can either:

- Click *Yes* to reassign the number to the current campaign or *No*, to assign the number to both campaigns.



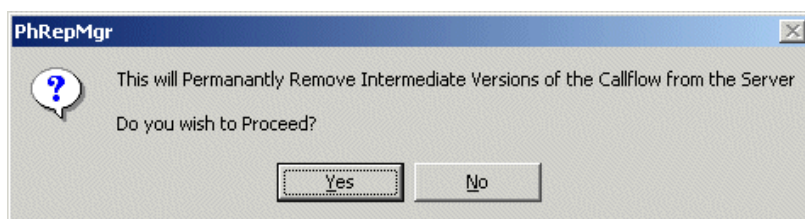
***If different campaigns share an incoming line, a box is displayed when taking calls, asking agents to select the campaign they wish to run.***

## Remove Intermediate Versions

The new Campaign Manager has the functionality to delete interim versions of callflows.

- Right click on the campaign, for which you want to delete the interim (saved) versions and select *Remove Intermediate Versions*.

A message will inform you that this will permanently remove all previously saved versions for the selected campaign.

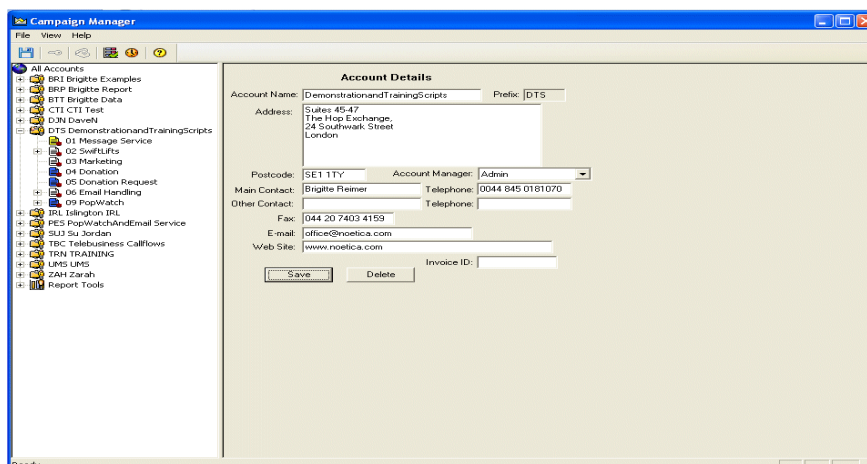


To go ahead click *Yes*, to cancel the action click *No*.

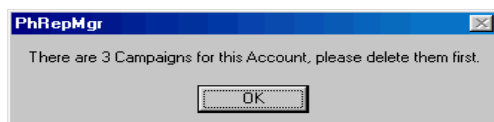
## Deleting Accounts

To delete Accounts or Campaigns:

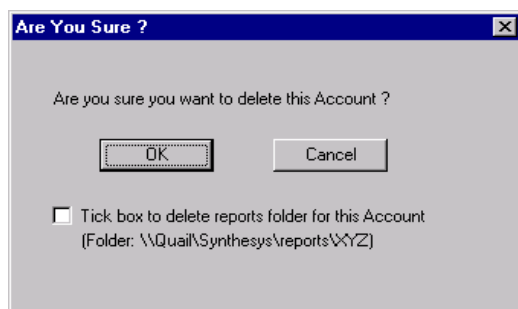
- Expand the **All Accounts** icon in the Campaign Manager and select the account or campaign you want to delete.
- To delete the selected account or campaign, click the **Delete** button.



Before an account can be deleted from Synthesys, all associated campaigns must be deleted first. A message to this effect will be displayed and the account will not be deleted.



- When all campaigns have been deleted for the account, press the **Delete** button will display the following message:



If the check box is ticked, the reports folder for the account will also be deleted.

- Press OK to delete the Account.

A message will inform you that the account has been deleted and the icon for the account will disappear from the Campaign Manager.

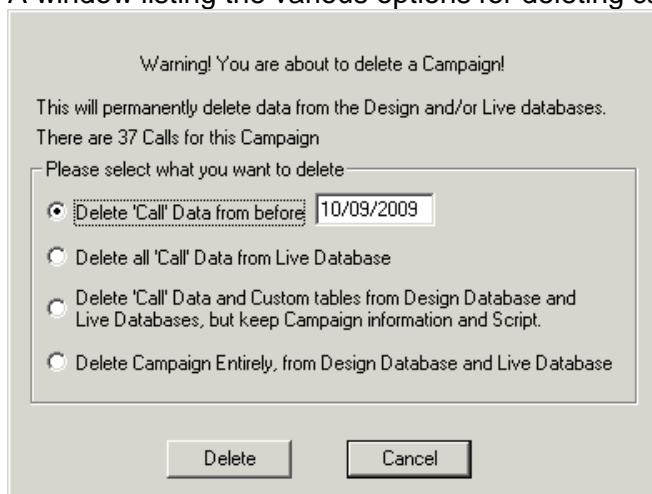
When deleting an Account, the following takes place:

- The Account is deleted from the 'Reports' folder on the Server (if applicable).
- The Account is deleted from Phoenix\_Account table (Phoenix database).
- The Account is deleted from Phoenix\_Account table (Phoneyx database).
- The Account is deleted from the 'Scripts' folder on the Server.

## Deleting Campaigns

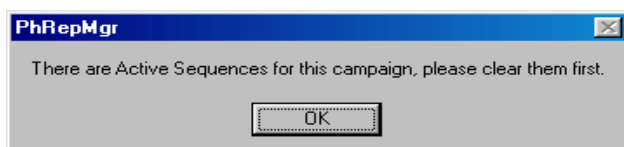
- Select the campaign you wish to delete and click the Delete button.

A window listing the various options for deleting campaigns is displayed:



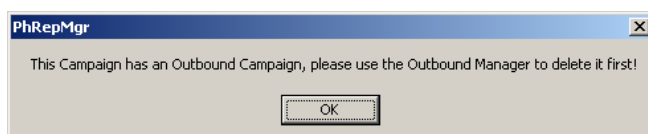
## Campaigns and Active Sequences

If there are *Active Sequences* associated with this campaign, you must go to the Call Tracker and archive any active and inactive calls, before the campaign can be deleted.



## Campaigns with Outbound Campaigns

Any Outbound campaigns that have been set up under the campaign that you wish to delete need to be deleted first in the Outbound Manager.



## Options for Deleting Campaigns

A record of the SQL commands used to delete the Campaign is recorded on the Server in EventLogs\DelCampaign\ folder, in .SQL files prefixed with the CampaignID.

### Option 1: Delete Call Data from before date

This option will delete data for this Campaign prior to the specified date. This option is useful for deleting 'test' calls for the Campaign before it goes live. This ensures that only live data is contained in the database.

The following takes place when this option is selected:

1. Transaction files for this Campaign are deleted from the Transactions folder on the Server.
2. CallFlow data is deleted from tables prefixed with the three-letter Account-prefix and two-digit Campaign-prefix, e.g. ABC01\_Main, from before specified date (Phoenix database).
3. Data is deleted from Phoenix\_Event table from before specified date (Phoenix database).
4. Data is deleted from Phoenix\_Sequence table from before specified date (Phoenix database).

The above is then repeated for the Phoneyx database.

### Option 2: Delete all Call Data from database

This option will delete all call data for this Campaign, but the tables themselves will remain. Use this option to delete all Campaign data, e.g. when re-starting an old Campaign.

The following takes place when this option is selected:

1. Transaction files for this Campaign are deleted from the Transactions folder on the Server.
2. All CallFlow data is deleted from tables prefixed with the three-letter Account-prefix and two-digit Campaign-prefix, e.g. ABC01\_Main (Phoenix database). N.B. data in the CALL\_RESULT table is not deleted, as this relates to the CallFlow itself.
3. Data is deleted from Phoenix\_Event table (Phoenix database).
4. Data is deleted from Phoenix\_Sequence table (Phoenix database).

The above is then repeated for the Phoneyx (Design) database.

### **Option 3: Delete Call data and Custom tables from Design Database and Live Databases, but leave Campaign information and Script**

This option deletes all database tables specific to this Campaign, and all other call data. The Campaign still remains in the Campaign Manager and the CallFlow itself can still be edited by the Campaign Editor.

Use this option when a CallFlow has been edited and changed significantly in its layout, and you no longer need tables or columns that were created by previous releases. As long as you are sure that you have no historical data that you need to retain, this option will delete all custom tables, but keep the CallFlow file. The CallFlow can then be re-released creating a fresh set of tables.

The following takes place when this option is selected:

1. Transaction files for this Campaign are deleted from the Transactions folder on the Server.
2. All CallFlow tables are deleted – those prefixed with the three-letter Account-prefix and two-digit Campaign-prefix, e.g. ABC01\_Main (Phoenix database). N.B. the CALL\_RESULT table is not deleted, as this relates to the CallFlow itself.
3. Data is deleted from Phoenix\_Event table (Phoenix database).
4. Data is deleted from Phoenix\_Sequence table (Phoenix database).

The above is then repeated for the Phoneyx (Design) database.

### **Option 4: Delete Campaign entirely, from Design database and Live Database**

This option deletes the campaign entirely. All database tables relating to the Campaign are deleted from both databases, as are the CallFlow files and transaction files.

The user will be stopped from deleting the Campaign by a pop-up message box if:

- There are any 'Outbound Campaigns' for the Campaign. These can be deleted using the Outbound Manager.

Or

- There are any reports set up for the Campaign. These can be deleted using the Campaign Manager, see 'Deleting Reports and Schedules' below.

The following takes place when this option is selected:

1. Transaction files for this Campaign are deleted from the Transactions folder on the Server.
2. All CallFlow tables are deleted – those prefixed with the three-letter Account-prefix and two-digit Campaign-prefix, e.g. ABC01\_Main (Phoenix database), including the \_CALL\_RESULT table)
3. Data is deleted from Phoenix\_Event table (Phoenix database).
4. Data is deleted from Phoenix\_Sequence table (Phoenix database).
5. Data is deleted from Phoenix\_Release table (Phoenix database).
6. Data is deleted from Phoenix\_Invoice table (Phoenix database).
7. Data is deleted from Phoenix\_DDI table (Phoenix database).
8. Data is deleted from Phoenix\_Search table (Phoenix database).
9. Data is deleted from Phoenix\_Campaign table (Phoenix database).

The above is then repeated for the Phoneyx (Design) database.

The Campaign icon disappears from the Campaign Manager.

## Deleting Reports and Schedules

Reports and Report Schedules are deleted via the Campaign Manager. With the 'Report Properties' dialog showing in the Campaign Manager, pressing the 'Delete' button will delete the report.

The user will be prevented from deleting the report if the report has any run 'Schedules' set up. Schedules can be deleted by selecting the 'Schedule' icon for the report and clicking on the 'Delete' button.

When a Report is deleted:

1. The Report is deleted from Phoenix\_Report.
2. The Report icon in Campaign manager disappears.

When a report 'Schedule' is deleted:

1. Data from Phoenix\_Report\_Run table is deleted for this Schedule.
2. The Schedule is deleted from Phoenix\_Schedule table.
3. The Schedule icon in Campaign manager disappears.



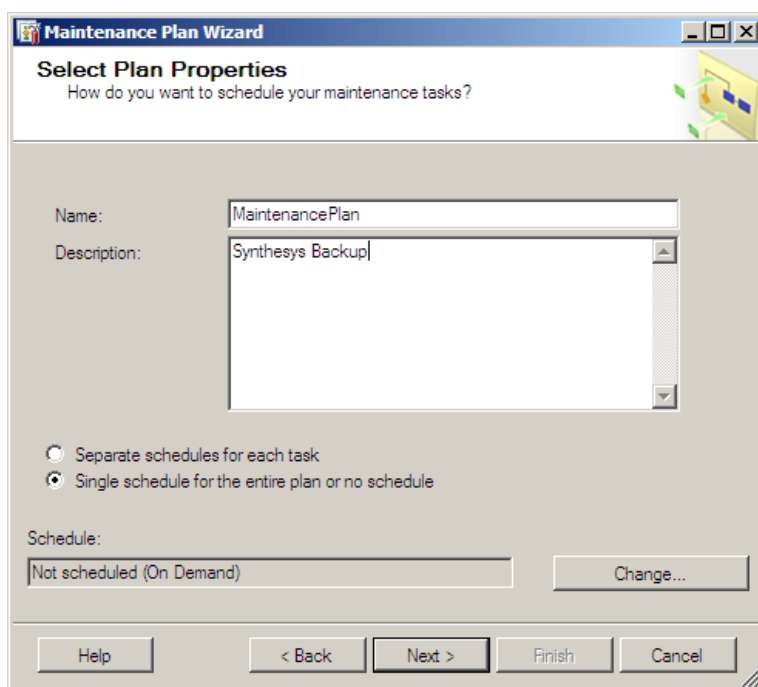
## APPENDIX

Setting up a  
SQL Server 2008 Maintenance  
Plan  
for Noetica  
Phoenix and Phoneyx databases

## SQL 2008 Maintenance Plan for Noetica Databases

The easiest way to set up the plan is through the **Maintenance Plan** wizard.

1. First enter / select a plan name and the scheduling option required.
2. Noetica recommend running these jobs when the system is not being used, or during quiet periods.
3. The schedule can be set, by pressing the change button. A scheduling dialog is presented:



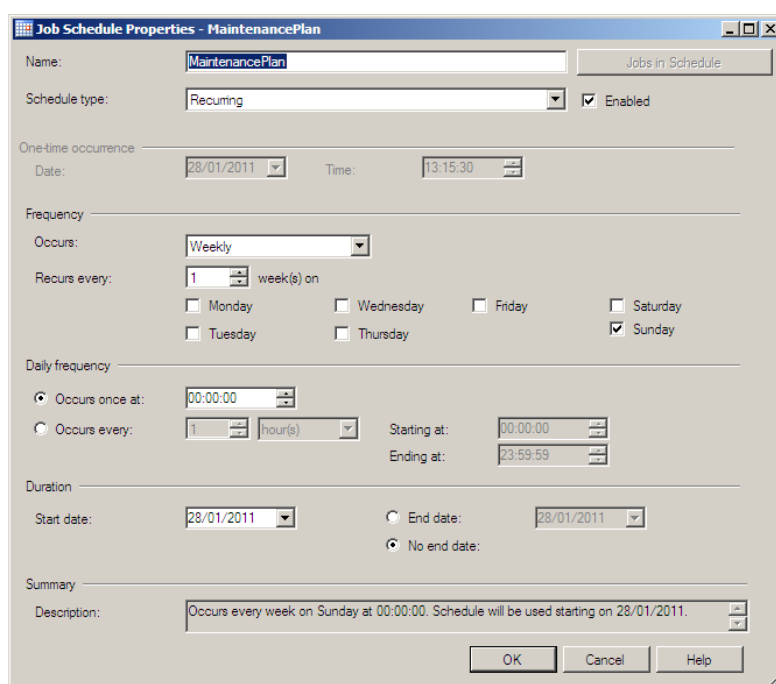
**Maintenance Plan Wizard**  
Select Plan Properties  
How do you want to schedule your maintenance tasks?

Name: MaintenancePlan  
Description: Synthesys Backup

☐ Separate schedules for each task  
☒ Single schedule for the entire plan or no schedule

Schedule: Not scheduled (On Demand) Change...

Help < Back Next > Finish Cancel



**Job Schedule Properties - MaintenancePlan**

Name: MaintenancePlan Jobs in Schedule

Schedule type: Recurring ☒ Enabled

One-time occurrence  
Date: 28/01/2011 Time: 13:15:30

Frequency  
Occurs: Weekly  
Recurs every: 1 week(s) on  
☐ Monday ☐ Wednesday ☐ Friday ☐ Saturday  
☐ Tuesday ☐ Thursday ☒ Sunday

Daily frequency  
☒ Occurs once at: 00:00:00  
☐ Occurs every: 1 hour(s) Starting at: 00:00:00 Ending at: 23:59:59

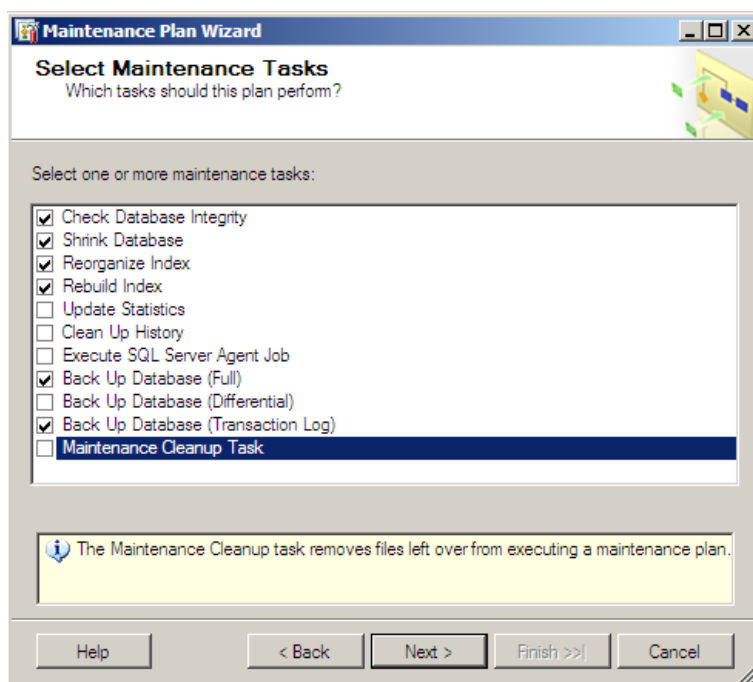
Duration  
Start date: 28/01/2011 ☐ End date: 28/01/2011  
☒ No end date

Summary  
Description: Occurs every week on Sunday at 00:00:00. Schedule will be used starting on 28/01/2011.

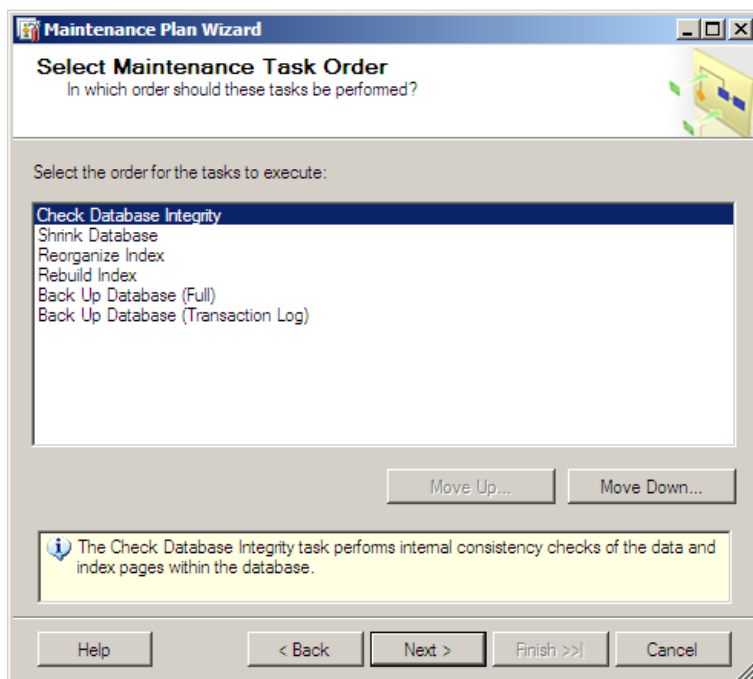
OK Cancel Help

4. Noetica recommend the following tasks to be performed in the **Maintenance Plans**:

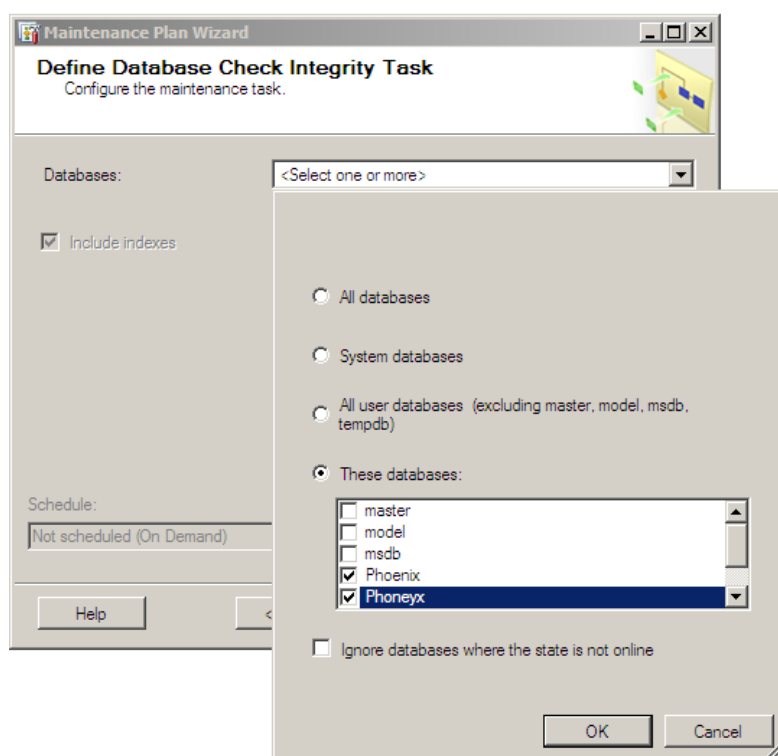
- Check DB integrity
- Index reorganising
- Index rebuilding
- DB shrinking and backup



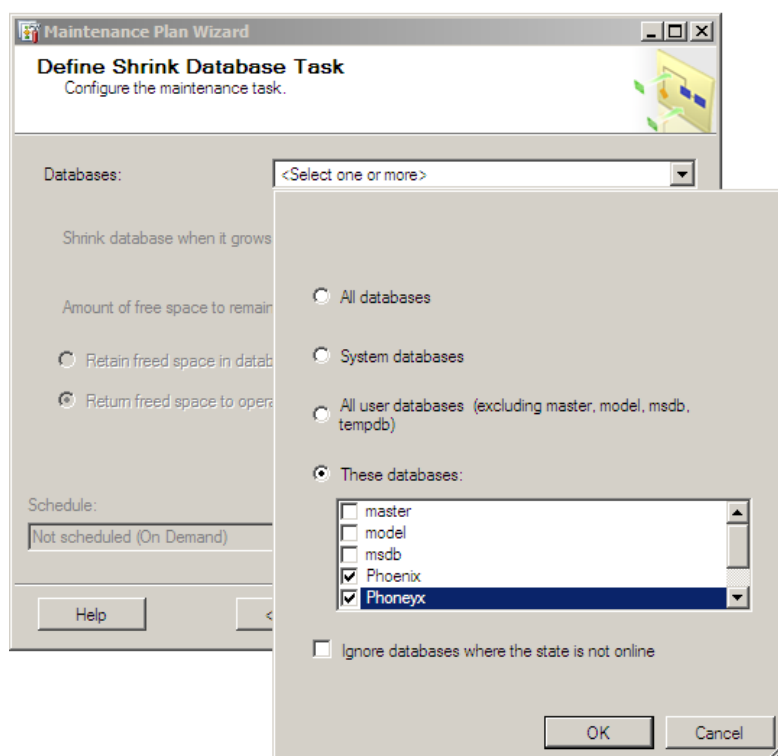
5. Select the **Order of the Maintenance Tasks**:



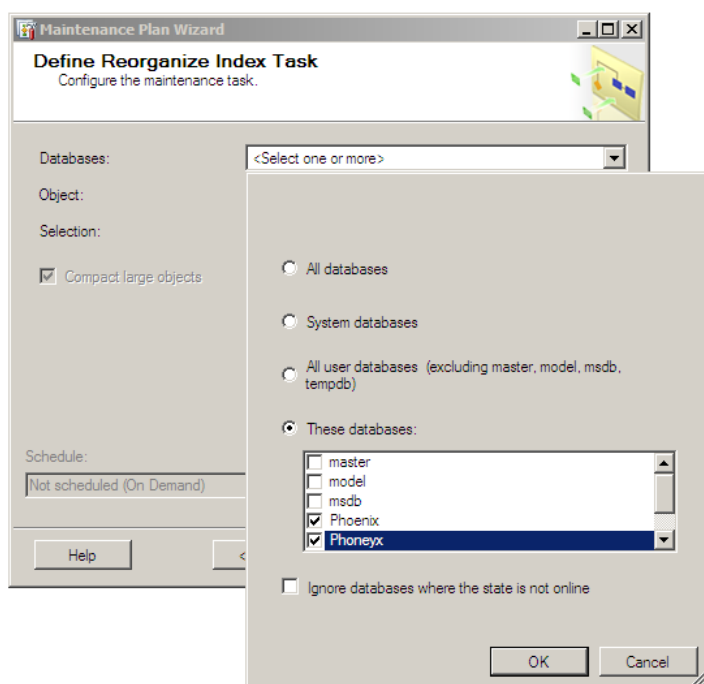
6. Specific Phoenix and Phoneyx DB's to run the **DB Integrity Check** task on:



7. Specific Phoenix and Phoneyx DB's to run the **DB Shrink Task** on:

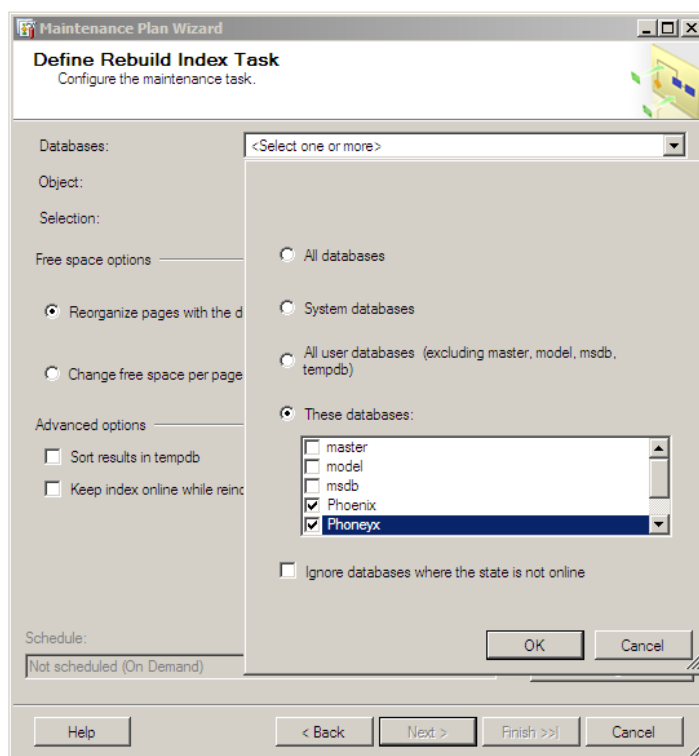


8. Define Phoenix and Phoneyx to run the **Reorganize Index Task** on:

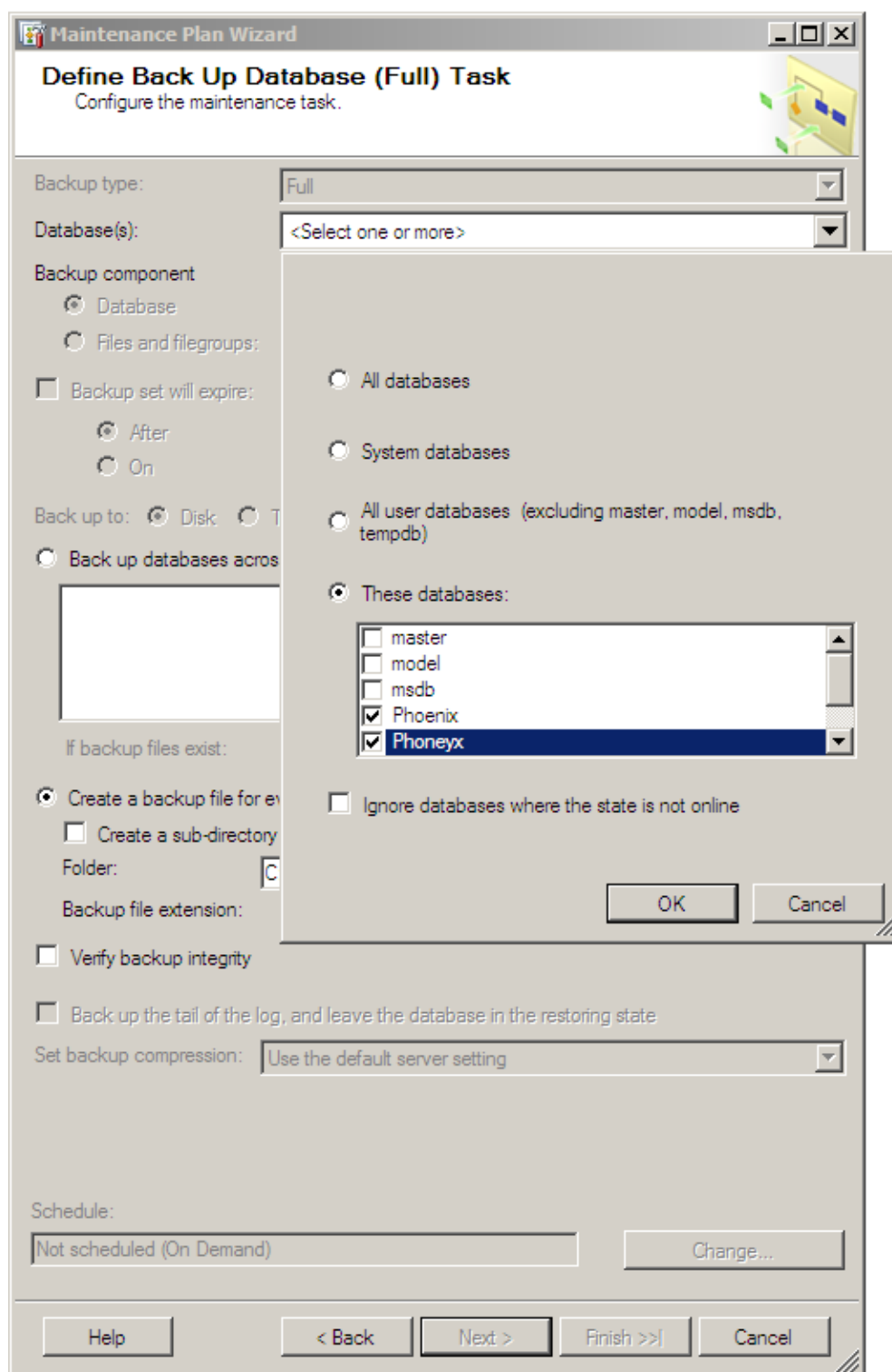


9. Select Phoenix and Phoenix Db's to run the **Rebuild Index Task** on

Please be aware that you will need to select the option 'Keep index online while reindexing', if running this while the system is operational



10. Select Phoenix and Phoenix DB's to run the **Full Backup Task** on:



**Maintenance Plan Wizard**  
**Define Back Up Database (Full) Task**  
 Configure the maintenance task.

Backup type: Full

Database(s): <Select one or more>

Backup component:  
☒ Database  
☐ Files and filegroups:

☐ Backup set will expire:  
☒ After  
☐ On

Back up to: ☒ Disk ☐ Tape

☐ Back up databases across

If backup files exist:  
☒ Create a backup file for every database  
☐ Create a sub-directory

Folder: C:\

Backup file extension: .bak

☐ Verify backup integrity

☐ Back up the tail of the log, and leave the database in the restoring state

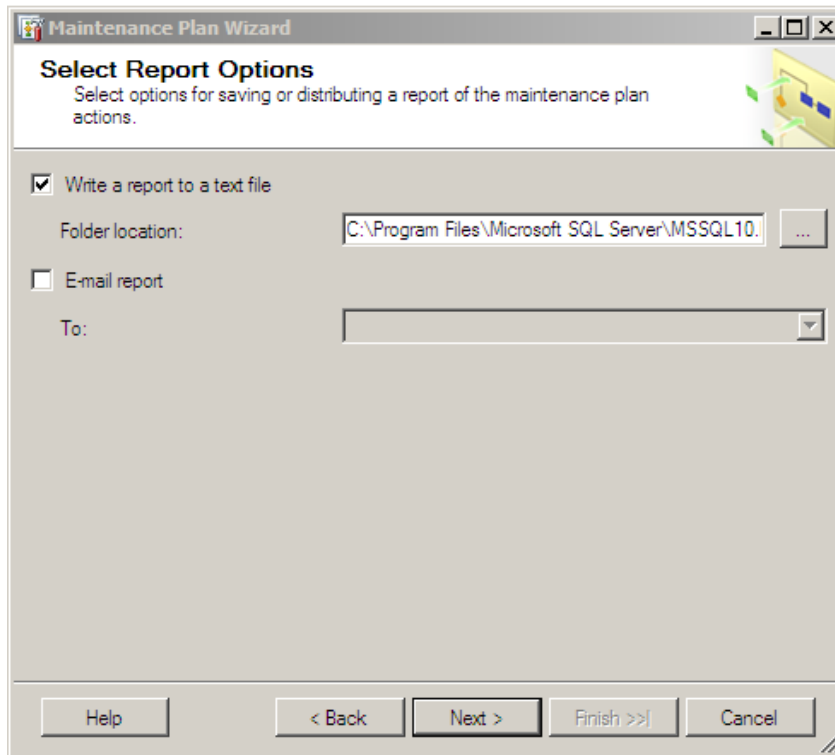
Set backup compression: Use the default server setting

Schedule:  
 Not scheduled (On Demand) Change...

OK Cancel

Help < Back Next > Finish >> Cancel

## 11. Select **Report Options**:



The screenshot shows the 'Select Report Options' step of the Maintenance Plan Wizard. The window title is 'Maintenance Plan Wizard'. The main heading is 'Select Report Options' with a sub-instruction: 'Select options for saving or distributing a report of the maintenance plan actions.' There are two options: 'Write a report to a text file' (checked) and 'E-mail report' (unchecked). The 'Folder location' for the text file is 'C:\Program Files\Microsoft SQL Server\MSSQL10...' with a browse button. The 'To:' field for email is empty. At the bottom are buttons: 'Help', '< Back', 'Next >', 'Finish >>', and 'Cancel'.

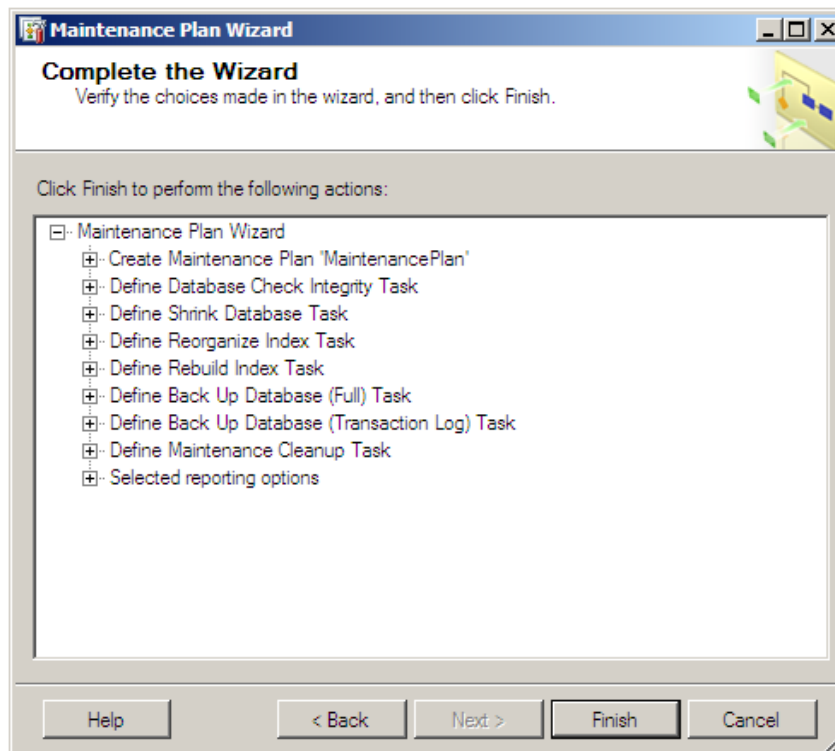
**Select Report Options**  
Select options for saving or distributing a report of the maintenance plan actions.

☒ Write a report to a text file  
Folder location: C:\Program Files\Microsoft SQL Server\MSSQL10... ..

☐ E-mail report  
To: .....

Help < Back Next > Finish >> Cancel

## 12. **Backup Summary** screen, Finish:



The screenshot shows the 'Complete the Wizard' step of the Maintenance Plan Wizard. The window title is 'Maintenance Plan Wizard'. The main heading is 'Complete the Wizard' with a sub-instruction: 'Verify the choices made in the wizard, and then click Finish.' Below this, it says 'Click Finish to perform the following actions:'. A list of actions is shown with expandable icons: 'Maintenance Plan Wizard', 'Create Maintenance Plan 'MaintenancePlan'', 'Define Database Check Integrity Task', 'Define Shrink Database Task', 'Define Reorganize Index Task', 'Define Rebuild Index Task', 'Define Back Up Database (Full) Task', 'Define Back Up Database (Transaction Log) Task', 'Define Maintenance Cleanup Task', and 'Selected reporting options'. At the bottom are buttons: 'Help', '< Back', 'Next >', 'Finish', and 'Cancel'.

**Complete the Wizard**  
Verify the choices made in the wizard, and then click Finish.

Click Finish to perform the following actions:

- Maintenance Plan Wizard
  - + Create Maintenance Plan 'MaintenancePlan'
  - + Define Database Check Integrity Task
  - + Define Shrink Database Task
  - + Define Reorganize Index Task
  - + Define Rebuild Index Task
  - + Define Back Up Database (Full) Task
  - + Define Back Up Database (Transaction Log) Task
  - + Define Maintenance Cleanup Task
  - + Selected reporting options

Help < Back Next > Finish Cancel

# NOTES