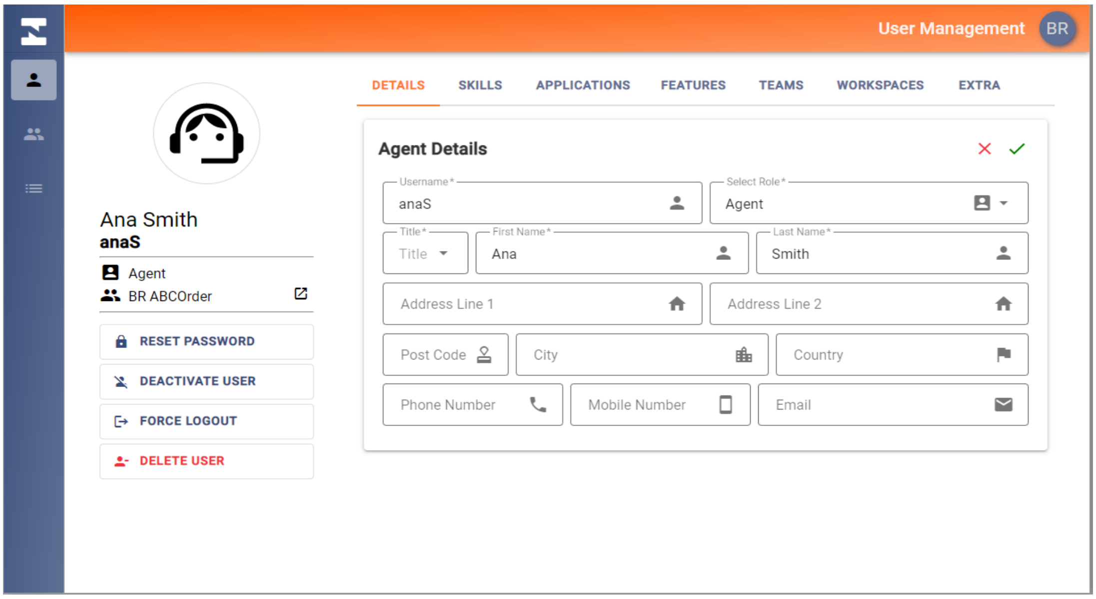
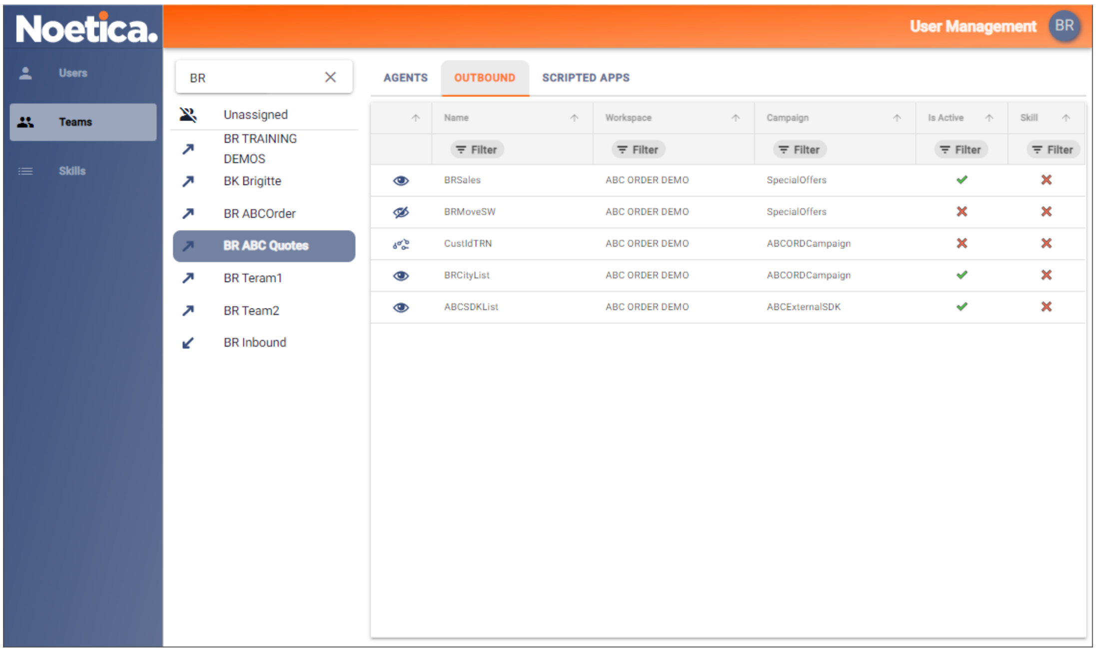
USER MANAGEMENT





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You must exercise care to ensure that your use of the software is in full compliance with laws, rules, and regulations of the jurisdictions with respect to which it is used.

The information contained in this document may change. We may issue revisions from time to time to advice of changes or additions. We operate a policy of constantly improving and enhancing our application software. There is a possibility, therefore, that the format of screen display and printed output shown in this documentation may differ slightly from that provided in the software. It is our policy to update this documentation whenever a major release of software takes place.

Noetica User Management

Last updated April 2022

CONTENT

NOETICA USER MANAGEMENT

Introduction

The Noetica User Management is a web application that enables contact centre administrators to create and manage users, teams, and skill levels. This includes the ability to specify Blending settings for the team(s), where enabled.

The level of access to and within User Management is determined by the permissions that have been granted to each User, or each Role.

In the **Users** dialog, you create and update user details, allocate access levels to User Management, and permissions to Synthesys™ applications and workspaces, and assign skill and competence levels to users, to enhance call routing for Inbound and Outbound campaigns.

Using Active Directory integration, new users and roles will be created and managed directly through Active Directory. Existing users can be imported into the Noetica User Management via an Import option in the Users dialog.

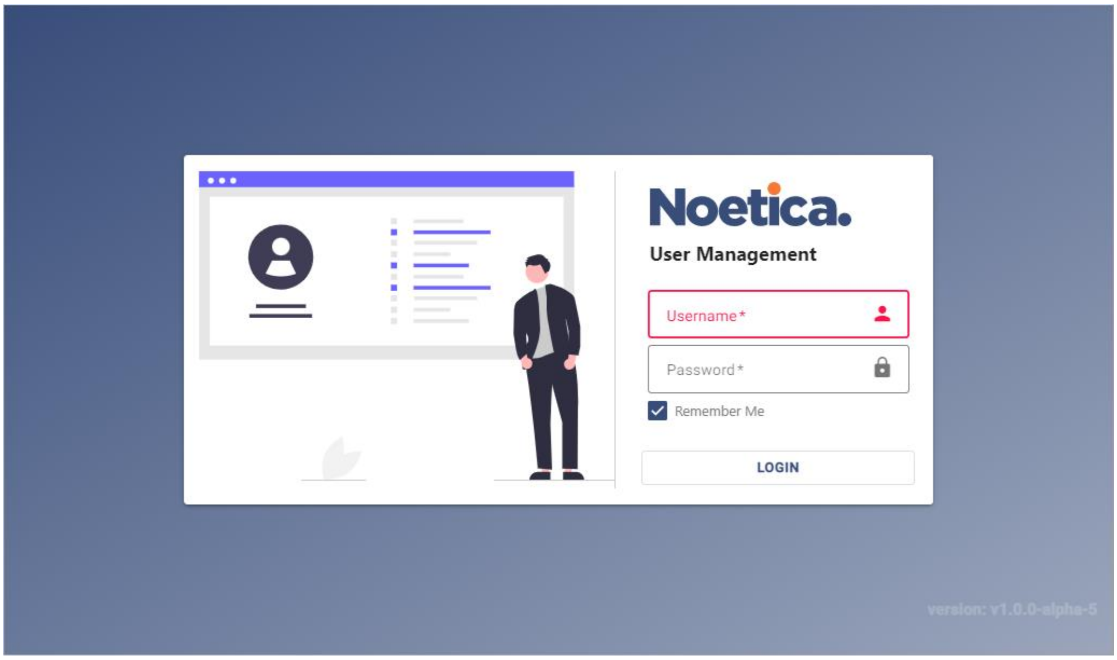
The **Teams** dialog is used to create teams and manage user team membership, to set the call mode (Inbound, Outbound or Blending), and to define team properties (CLI, and switch specific settings). In the Teams dialog, you can also view information associated with the agents, call lists, groups and scripted apps that have been assigned to a team.

In the **Skills** dialog, you can create and manage user skills and skill assignments to agents, and view the names of the campaigns, outbound groups, call lists and routing strategies that are currently using the selected skill.

Launching User Management

To access the Noetica User Management

- Launch User Management via the Noetica Admin Portal, or
- Enter the URL for the User Management into the address field of the web browser (all excepted, apart from Internet Explorer), e.g., http://WebserverName/UserManagement**.**
- Next, enter your username and password, as provided by your system administrator.



Access to the User Management will typically be restricted to Contact Centre Administrators or Team Leaders.

Please contact your system administrator for more information.

Access to User Management

Content visibility, and the actions that a user can perform within User Management are determined by the Feature permissions that have been allocated to the User, or the User Role.

To access User Management, user's need to have been granted at least one of the relevant Features listed below, in addition to the Application permission.

Features	Access in User Management
User Features	
All .NET Manage Users Manage Personnel	The "All", ".Net Manage Users" and/ or "Manage Personnel" Feature permissions enable the user to access to the Users page and to "View User Details", "Create/Import User", "Edit User Details", "Assign User Skills*, "Delete User" and "Reset Password".
Manage Credentials	Will give the user permission to "Reset Password", but only if it is, as a minimum, assigned in conjunction with the "View Users" feature.
View Users	Will allow the user to view (but not edit) details of other users, with only details up to the level that the user itself holds being visible.
Team Features	
All Manage Team	With the "All" and/ or "Manage Team" feature assigned, the user will have access to the Teams page, with permissions to "View Teams", "Create Teams", "Edit Team Blending", "Move Team Members" and "Delete Teams".
Manage Team Members	Will give the user access to the Teams page, and permissions to "View Teams" and to "Move Team Members" between teams.
Manage Team Settings	Will give the user access to the Teams page and permissions to "View Teams" and "Edit Team Blending" settings.
Skill Features	
All Manage Skills	With "All" and/ or "Manage Skills" assigned, the user will be able to access the Skills page, and to "View Skills", "Create Skill", "Edit Skill Details", "Unassign User Skill" and "Delete Skill". To "Edit User Skills", the user also needs to be granted access to the Users page, with a minimum of the "View Users" feature assigned, if read-only access to other User details is desired for specific Users or Roles.

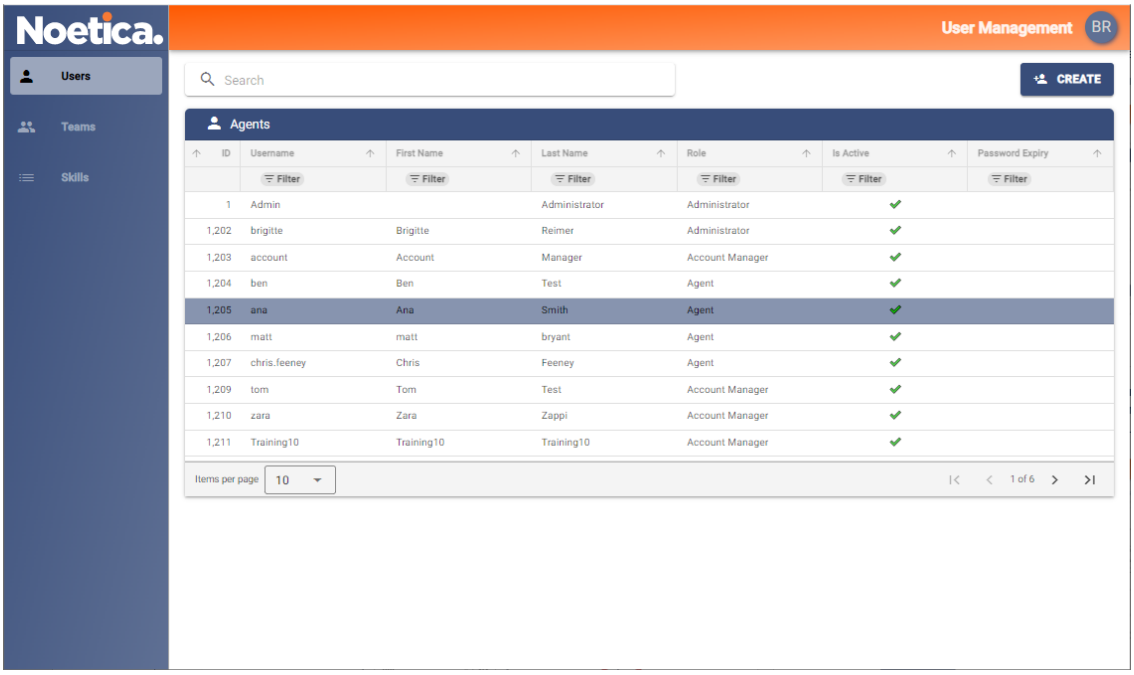
Further permissions, to enable a user to carry out additional tasks within the Synthesys™ applications as required, can be allocated via the Skills, Features, Applications, Workspaces and Teams sections of the **Users** dialog

USER MANAGEMENT FEATURES

Once logged-in, the default view will depend on your level of access in User Management.

With only the “Manage Skills” or “Manage Teams” permission, you will navigate directly to either the Skills or Teams page and will only have access to this item in the navigation sidebar.

If you have access to all pages, or only the User page, the Users landing page will open upon logging-in. Column text filters and sorting can be applied to search for and display existing users.



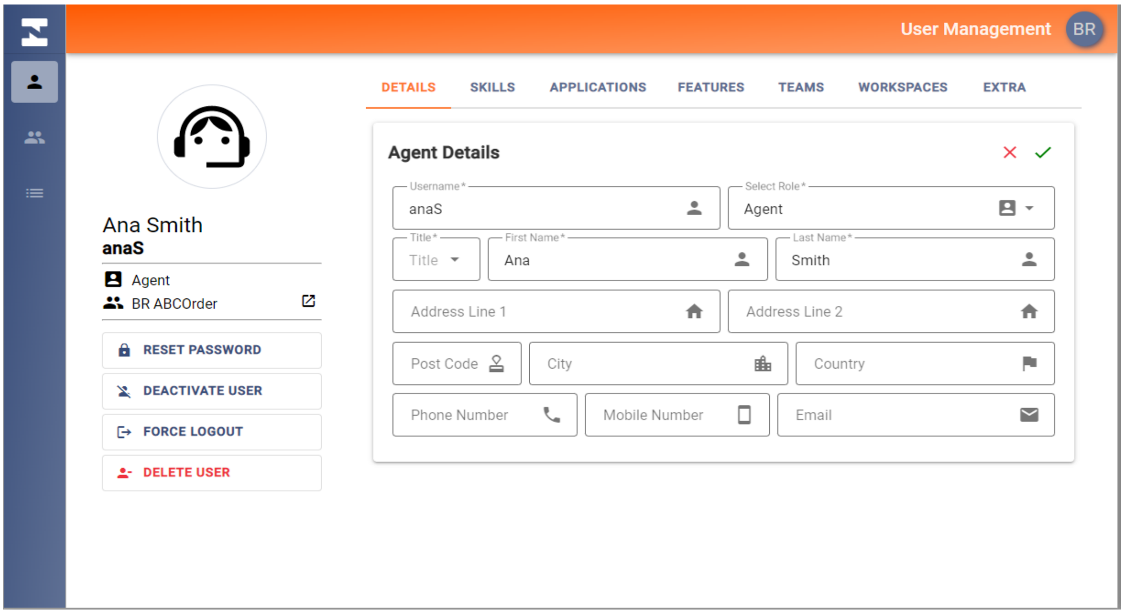
Available dialogs in the Noetica User Management include Users, Teams and Skills.

Option	Used To
Users	Create new users and to manage existing user details, including skill levels and access to available Synthesys^{TM} applications.
Teams	Create new teams and manage team user membership, and to show the call lists and scripted apps assigned to the team, and associated details.
Skills	Create and manage user skills, and to view the agents, campaigns, groups, lists and routing strategies that are currently using a selected skill.

Buttons	User To
Import	Import users, who are created and managed through Active Directory, into the Noetica User Management.
Create	Create new users, adding user and login details, and the appropriate permissions to Synthesys^{TM} modules.

USERS

In the **Users** dialog of the Noetica User Management, you can create new users, or search for, view and update details associated with an existing user.



Tab Heading	Used to view & edit
Personal Details	General information associated with the selected user, including username, address, telephone, and email details.
Skills	Skill and competence levels of a selected user, for improved Inbound and Outbound call routing.
Applications	User access to selected Synthesys™ modules, such as the Agent Portal, or Teams, Outbound, the Dashboard and the Call Monitor.
Features	User permissions to perform tasks within assigned Synthesys™ application, such as managing teams and outbound campaigns, or simply handle calls.
Teams	User access to view details of selected teams in the Noetica Dashboard.
Workspaces	Access to manage selected workspaces in the Campaign Manager.
Extra	Additional Team properties, i.e., CLI to present, or switch specific settings.

Buttons	User To
Reset Password	Auto generate a password, which can be changed using the Change Password option, when logged in to the Synthesys™ Agent Portal.
Deactivate User	Render a user inactive, so the user can no longer log in to Synthesys™ applications.
Force Logout	Eject the selected user from all Synthesys™ modules.
Delete User	Delete the selected user from the Synthesys™ system.

Creating new Users

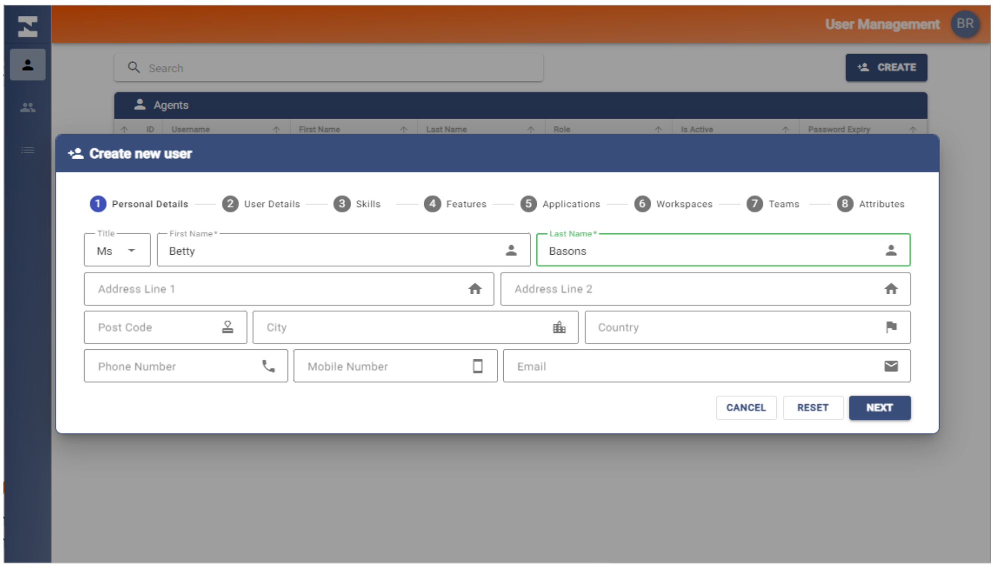
When creating a new user, you start by adding personal and login details for the user.

Moving through the available tab headings of the *Create new user* section, you then assign skills and competence levels, determine system access to selected applications, workspaces, and teams, and you can add switch specific settings.

Personal Details

In the **Personal Details** section, you can add, edit, and view a user's personal details.

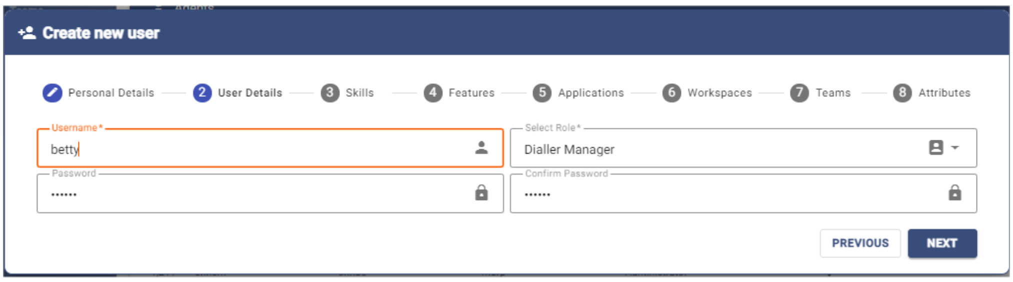
- For a new user, add the user's First Name and Surname.
- Adding a title, address details, telephone numbers and email is optional.



User Details

In the *User Details* section, add the user's login details, and assign a role, reflecting the tasks that the user will be able to carry out within Synthesys^{TM}.

- Enter the **Username**, for logging in to the Synthesys^{TM} system.
- Select the **Role** to be assigned to the user, to determine system access.
- Enter and confirm the user's log in **password** to access the Synthesys^{TM} modules.



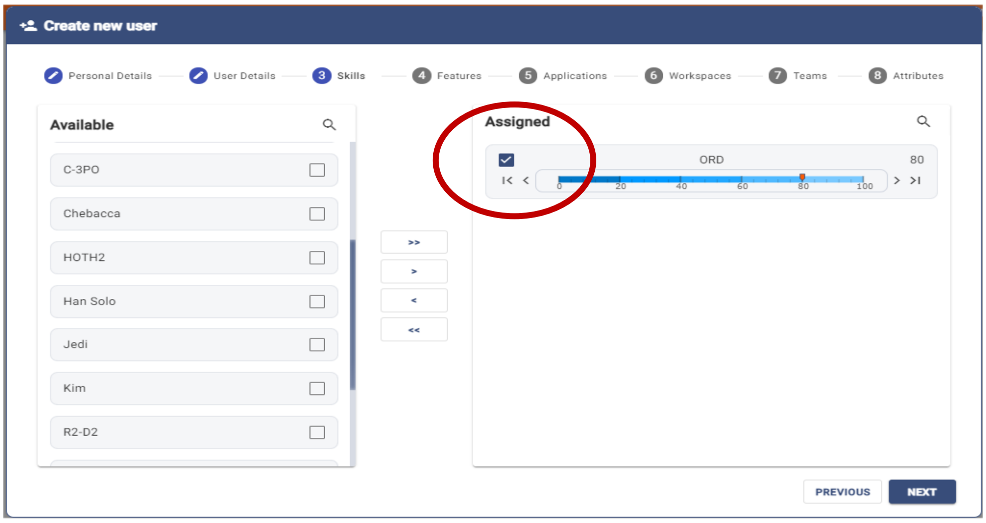
Passwords can be reset in the User Details dialog, by auto generating a password, which can be changed by the user, when logged in to the Synthesys^{TM} Agent Portal.

Skills

The **Skills** section of the *Create new user* screen displays all skills that have been created in the Skills dialog of the Noetica User Management,

To assign skills to a new or existing user, and to manage skill levels:

- Use the **>** arrow, to move selected skills into the **Assigned** column on the right.
- Select the skill assigned, and use the **Ability slider**, to set the user's competence level.
- To remove selected or all assigned skills, use the **<** or **<<** arrows.

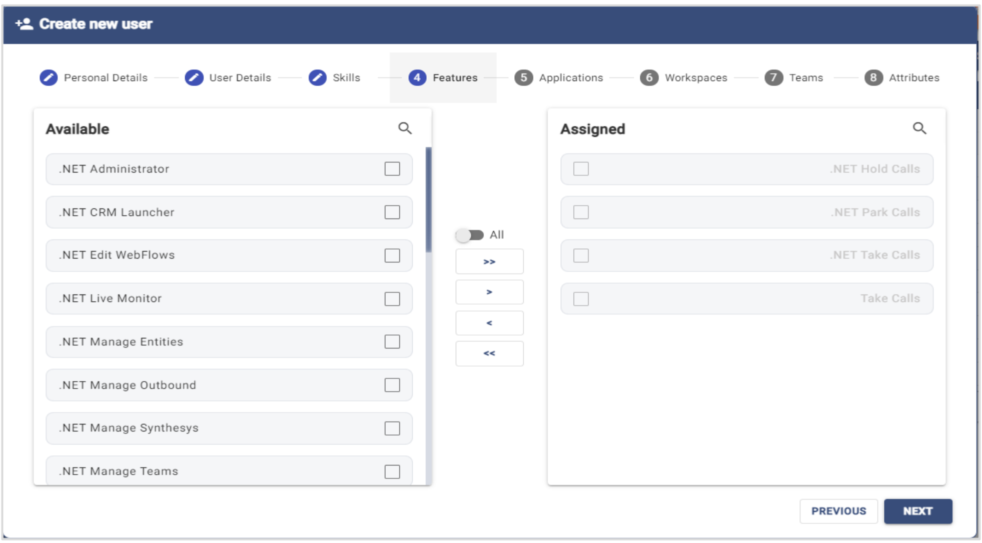


Features

In the **Features** section, you can assign any permissions, as required, to allow the user to perform tasks in addition to those automatically allocated as part of the selected user's role.

To access the Campaign Manager for example, a user must have been assigned the .Net Manage Outbound permission.

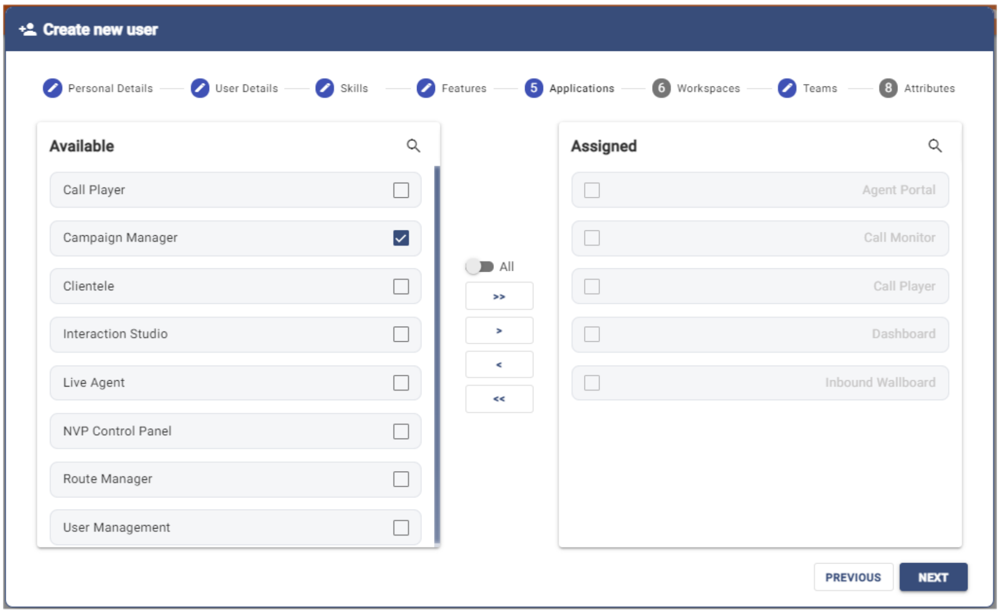
- Use All, or the **> <** arrows, to move selected features in/ out of the **Assigned** column.
- To remove selected or all additionally assigned features, use the **<** or **<<** arrows.



Applications

In the **Applications** section, you can grant the user access to selected Synthesys^{TM} modules, in addition to those automatically assigned with the user's role.

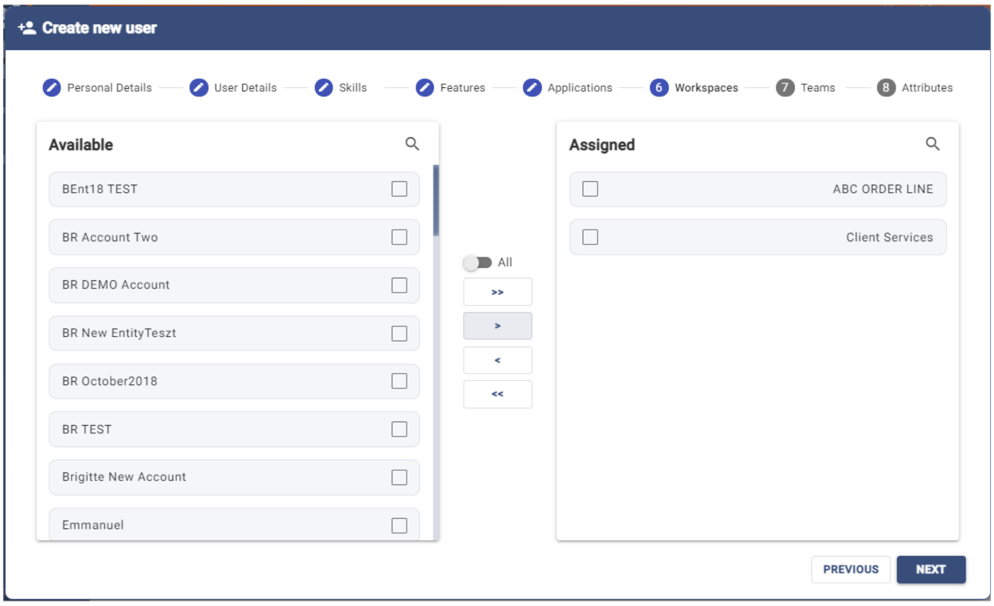
- Use All, or the **> <** arrows, to move selected application in/ out of the **Assigned** column.
- To remove selected or all additionally assigned applications, use the **<** or **<<** arrows.



Workspaces

In the **Workspaces** section, you determine which workspaces the selected user will be able to manage in the Synthesys^{TM} Campaign Manager.

- To restrict the user's access to specific workspaces only, select the workspaces, as required, to move **>** them into the **Assigned** column.
- To grant the selected user access to all workspaces, click the **All** option.
- To remove selected or all assigned workspaces, use the **<** or **<<** arrows.

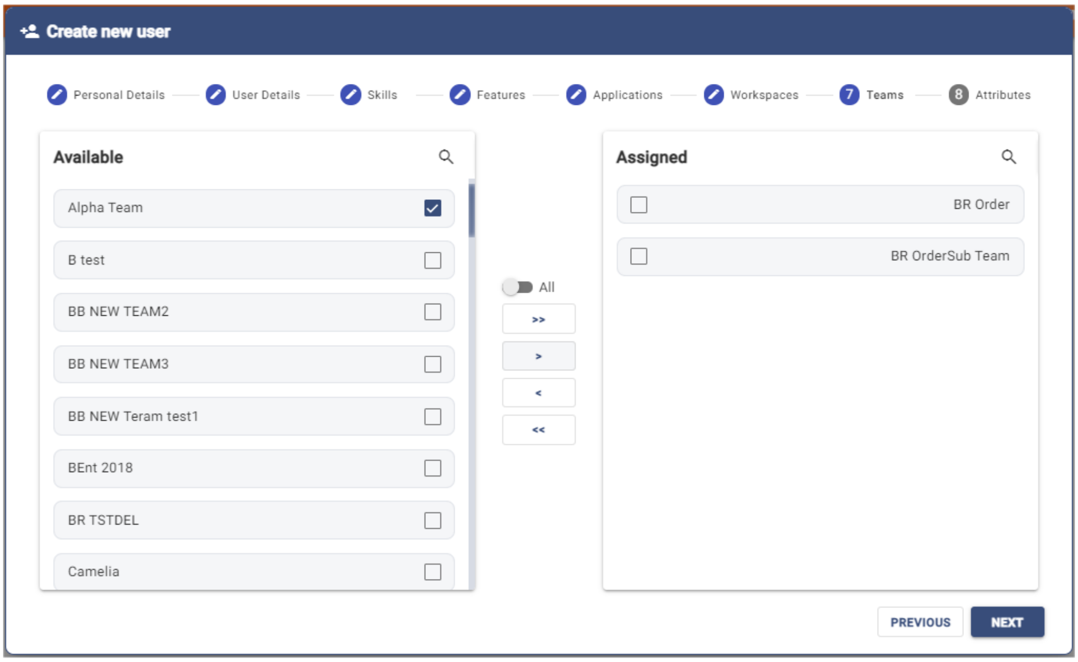


Teams

The **Teams** section displays a list of all teams that have been created in Teams dialog of the Noetica User Management.

Here you determine for which teams the user, typically a supervisor or dialler manager, will be able to view agent details and data statistics in the Dashboard.

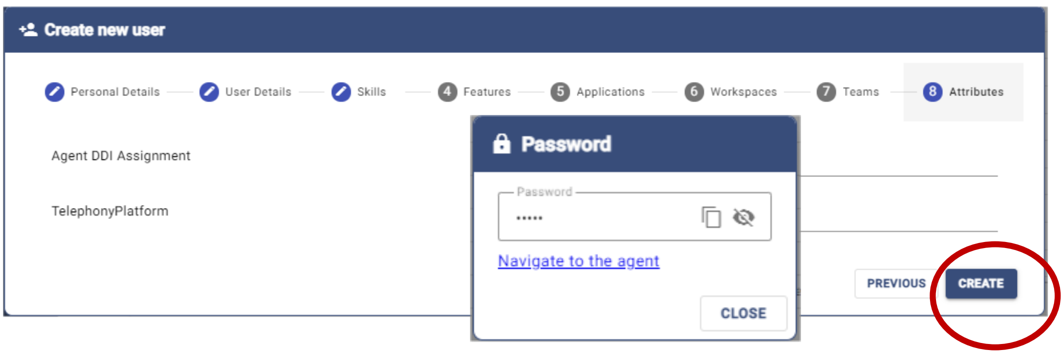
- Use the **>** or **>>** and **<** or **<<** arrows, to move selected teams into and out of the **Assigned** column on the right.



Attributes

Use the **Attributes** section of the *Create new user* screen to set additional properties and switch specific settings, e.g., Agent DDI Assignment and Telephony Platform.

The options available will depend on your installation and switch configuration.



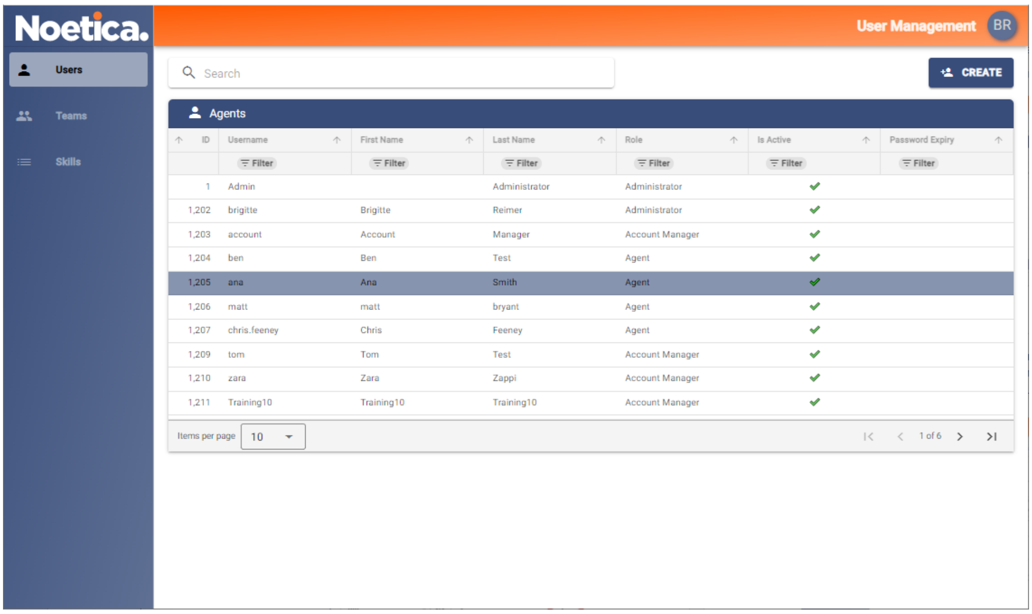
Create User

- Click the **Create** button, to create the new user, and to add the details to the user list
- You will be given the option to view the password entered, and to navigate directly to the new user's detail page, or you can **Close** the dialog.

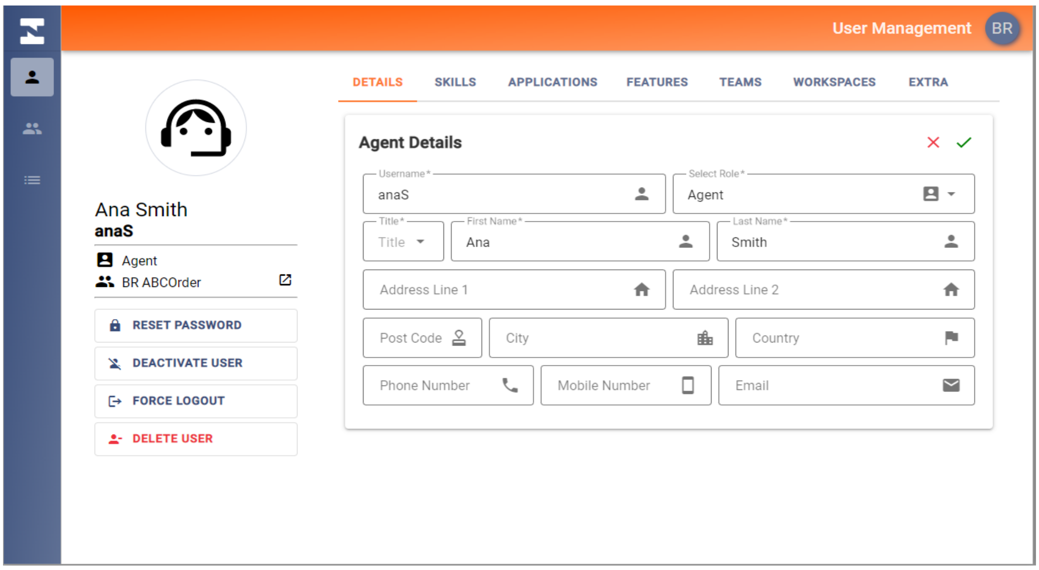
Editing Users

To view or edit details for an existing user in the Noetica User Management

- Use the column text filters and sorting option to search for and display the user.
- Double click on the username in the **Users** dialog, to open the **Agents Details** page.



- Move through the **Details, Skills, Applications, Features, Teams, Workspaces** and **Extra** sections, to view and/ or update any details as required.
- Click the edit icon to update user information, then Save the changes.



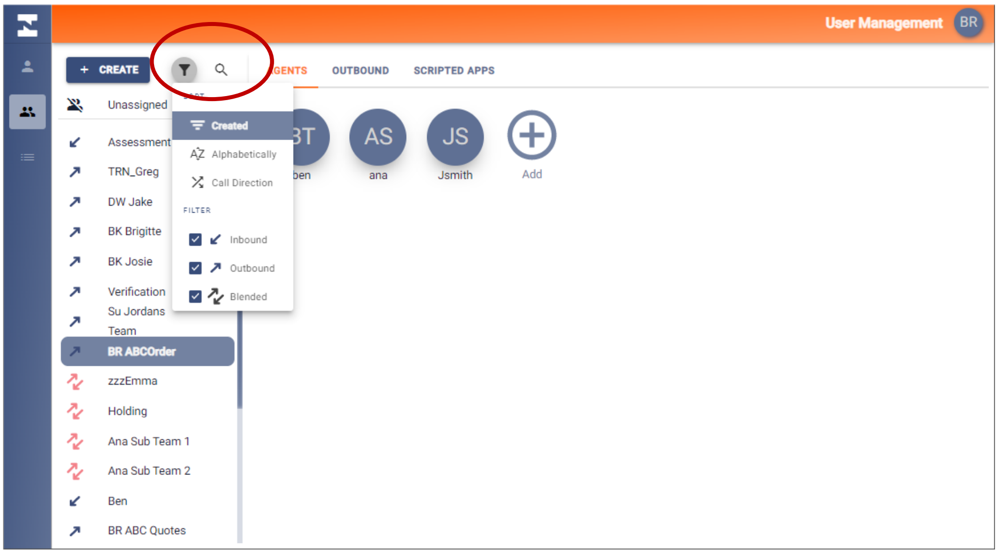
- Use the **Reset Password** button, to auto generate a password, which can be changed via the Change Password option, when logged in to the Synthesys™ Agent Portal.
- Click the **Force Logout** button, to eject the selected user from all Synthesys™ modules.
- Use the **Deactivate** or **Delete** buttons, to deactivate or delete the selected user.

TEAMS

Teams are essentially workgroups that contain the users, i.e., team members fulfilling different roles, and the work objects, such as *Call Lists, Outbound Groups, and Scripted apps*.

In the **Teams** dialog of the User Management you create, update, and delete teams, and view details of agents, call lists, groups and scripted apps that have been assigned to a team.

- Use the **Filter** or **Search** options, to display a specific team or teams. To locate Blended, Inbound or Outbound teams, or to sort teams alphabetically, use the **Filter** option.

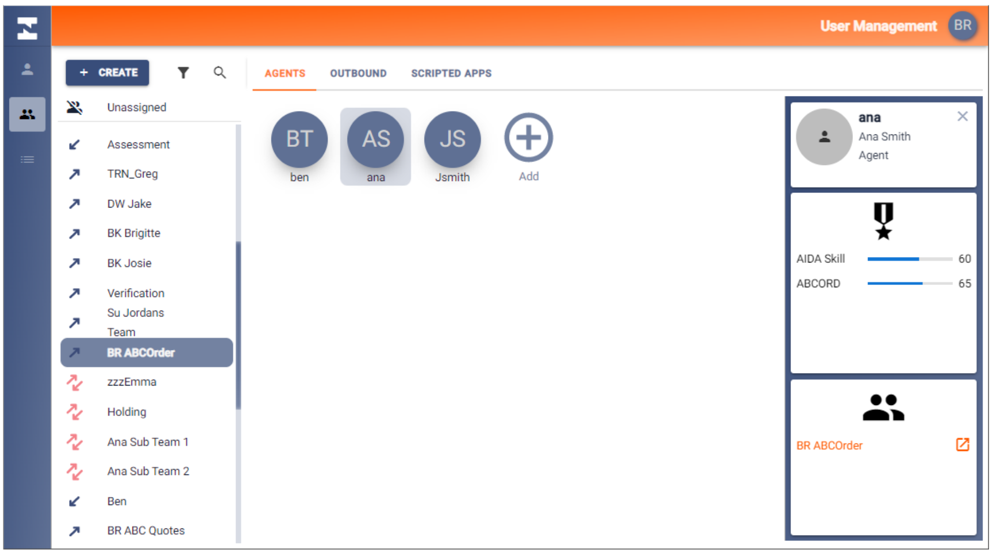


Viewing Team Membership

All users, when created or imported via the **Users** dialog in the Noetica User Management, are initially placed in the **Agents** page of the **Unassigned** team, until they are moved into the appropriate teams.

Agents

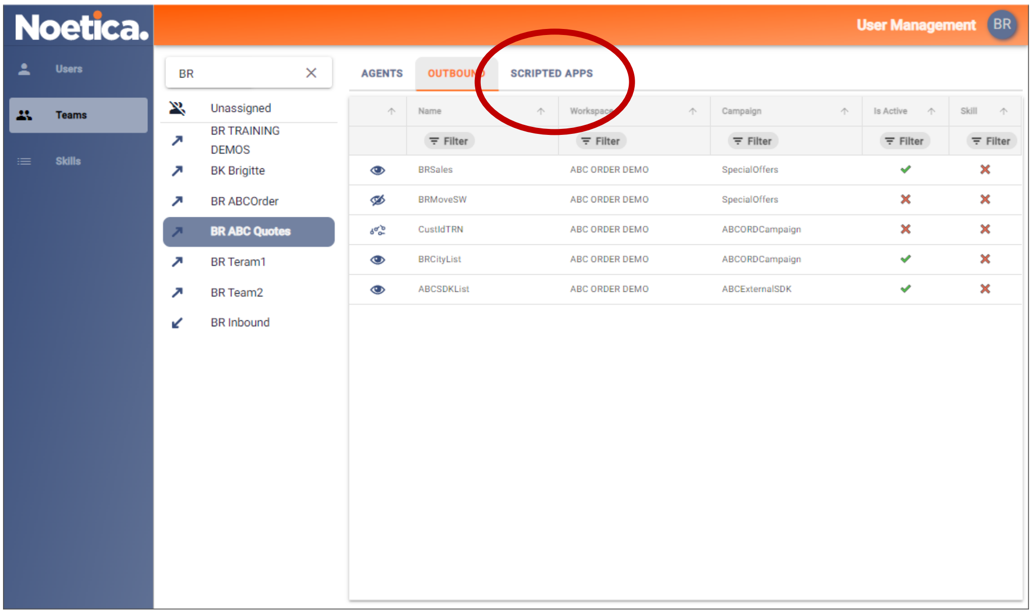
Selecting the agent's name icon in the Agents page, you can view associated details in the column on the right, such as the agent's login and full name, the role allocated and the skills assignments.



Outbound

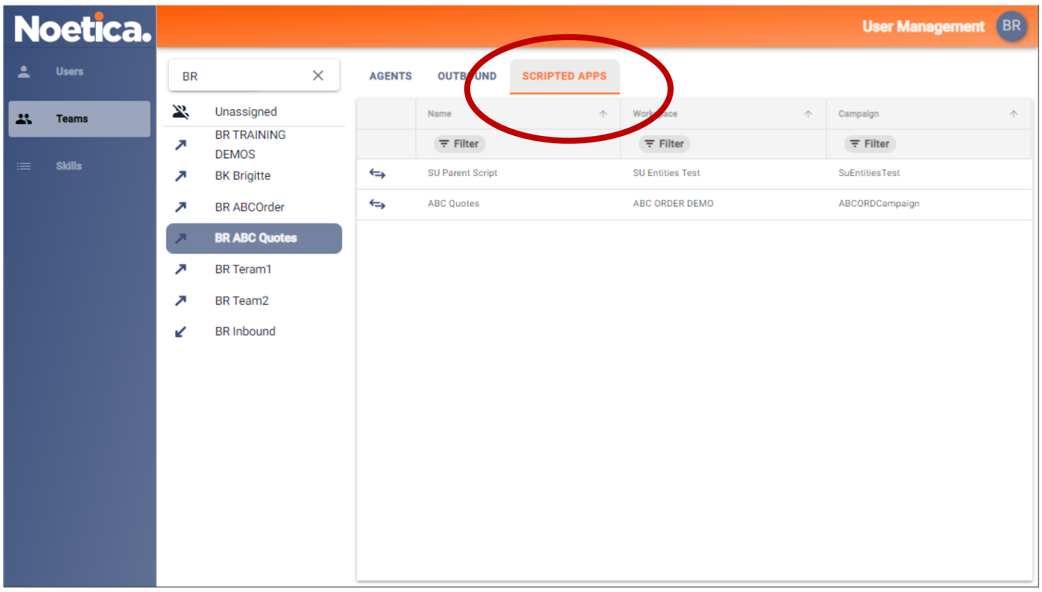
Selecting the **Outbound** tab, you can view all call lists and outbound groups that have been assigned to the selected team in the Synthesys^{TM} Campaign Manager, and associated workspace and campaign information.

It also shows if the call lists and groups are currently active, and if any skills have been applied.



Scripted Apps

The **Scripted Apps** page displays the scripted apps that were assigned to the selected team in the Synthesys^{TM} Campaign Manager, and associated workspace and campaign information.



The Inbound numbers that will pop the scripted app for the campaign the agent is working, is assigned at scripted app level via a DDI tab in the Synthesys^{TM} Campaign Manager, for non NVP (Noetica Voice Platform) users.

For NVP users, scripted app details will be assigned as part of the Inbound routing strategy in the Noetica Route Manager.

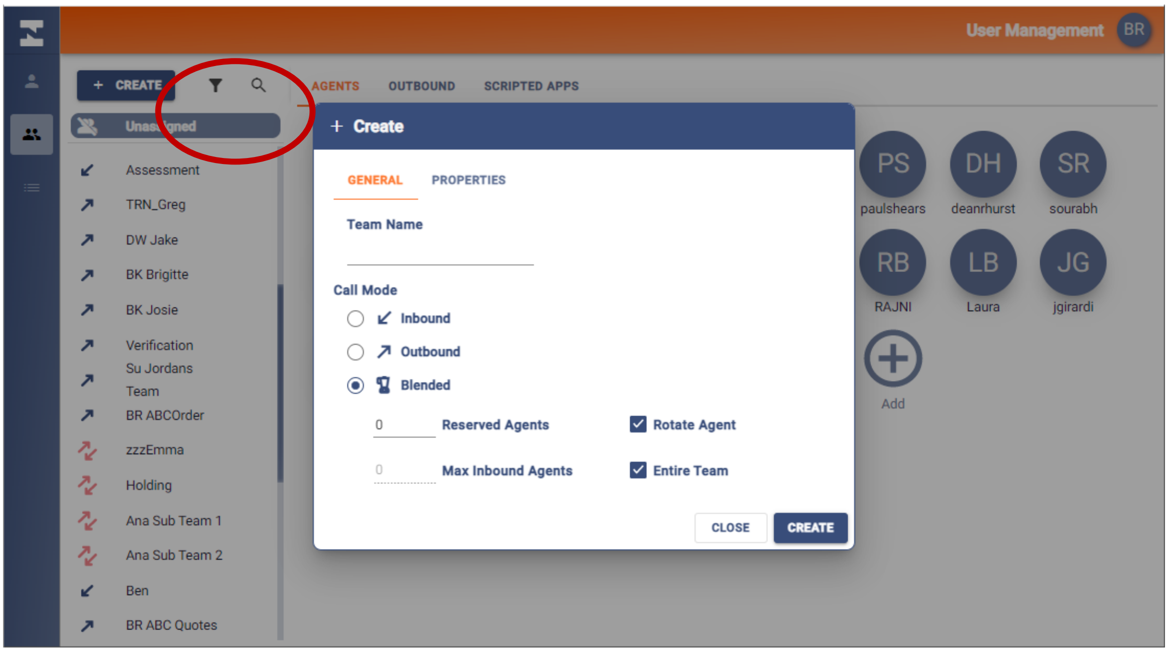
Creating new Teams

When creating a new team, use the **General** page to add a team name, and to define the call mode and blending settings. Use the **Properties** page, to add switch specific details.

General

To create a new team

- Click the **Create Team** button at the top left of the Teams dialog.
- Enter a unique name for the team into the **Team Name** field.
- Select the **Call Mode** for the Team, i.e., Inbound, Outbound or Blended.



Blending Settings

For **Blended** teams, which contain both Inbound and Outbound campaigns

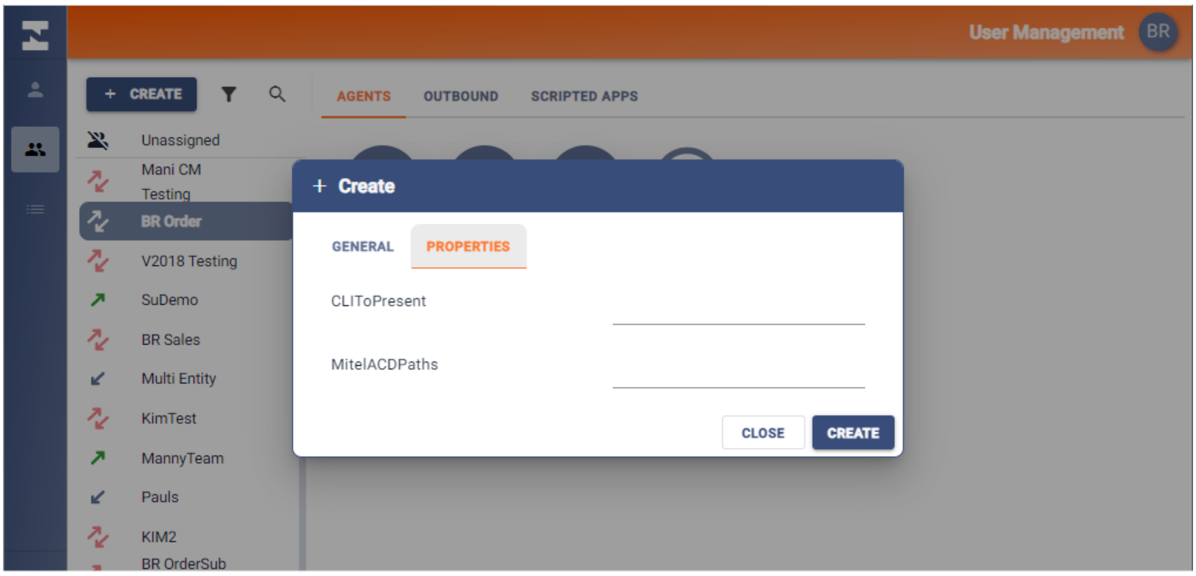
- Specify the number of **Reserved Agents** that should remain free to take Inbound calls.
- Or alternatively, set the **Reserved Agents** to zero (0), in which case all agents are assigned to outbound, and only when Synthesys™ is notified by the telephony platform of an incoming call, will the system move the next free agent to Inbound work.
- Specify the **Max Inbound Agents** that can be either in or are waiting for Inbound calls.
- Tick the **Agent Rotate** option, if you want to ensure that the Inbound work is evenly distributed among the available agents.
- Tick the **Entire Team** option, to allow the entire Team to take Inbound calls, increasing and decreasing the maximum number of agents automatically and dynamically, rather than using a set number of agents.

Properties

In the Properties page of the Create team dialog, you can set additional team properties, as required, such as the CLI to present, and other switch specific settings.

The options available will depend on your installation and switch configuration. In our example, you can enter the

- Caller Line Identity number (CLIToPresent) to pass on when a call is made.
- Mitel ACD Paths, i.e., the DDI number that is used to direct the Inbound calls to agents.



If Multiple Telephony Platforms are installed, you will be able to select the relevant platform for the team via a drop-down list.

At logon in the Agent Portal, the Telephony Platform assigned will be displayed automatically in the CTI dialog.

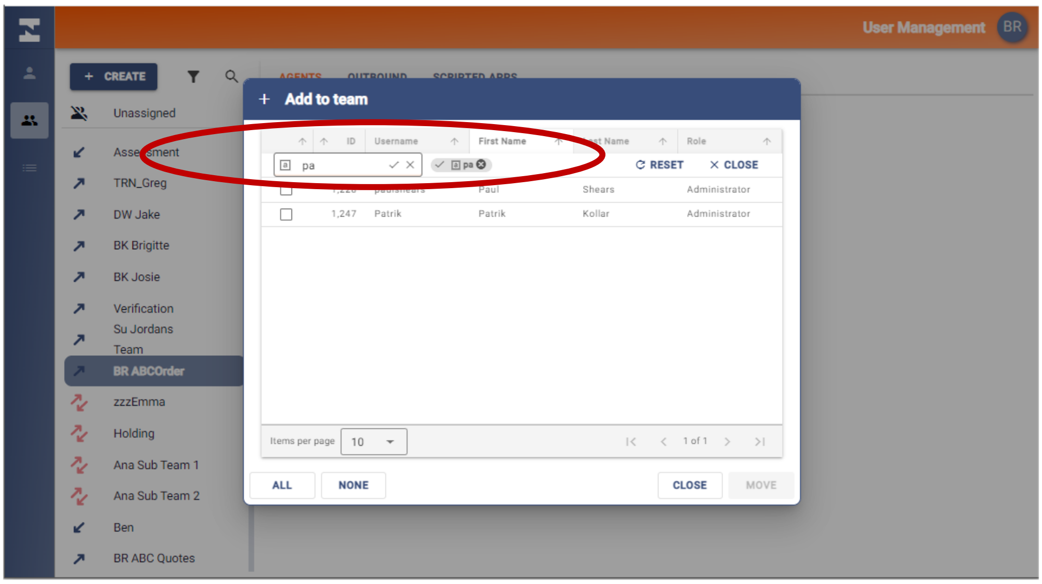
If the user is part of multiple teams with differing Telephony Platform settings (and the user does not have a TP set individually, which would override the team settings), the user will be able to select the Telephony Platform to be used from a drop-down menu.

Adding Users

Newly created or imported users will initially be stored in the Agents page of the Unassigned team.

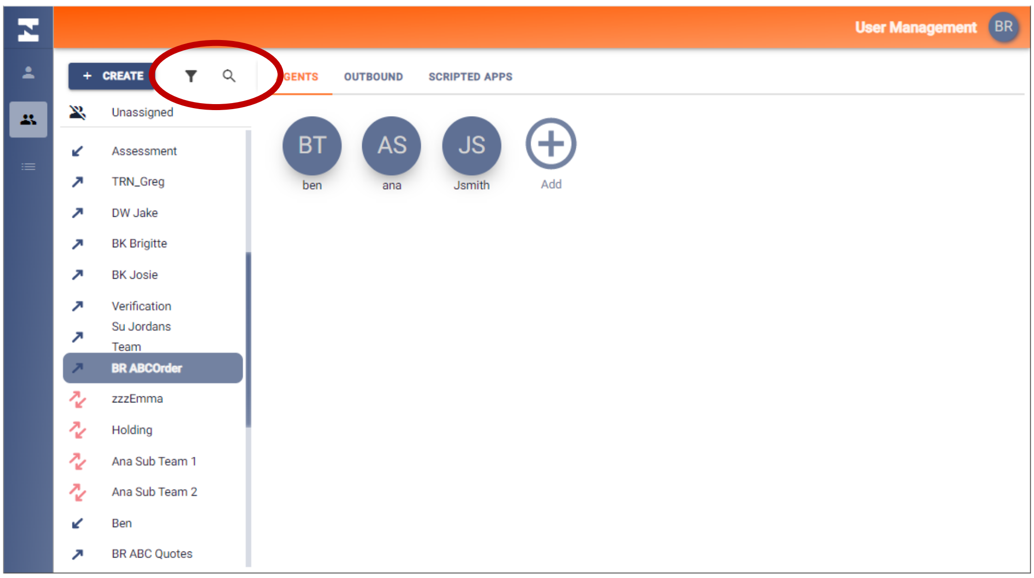
To move users from the **Unassigned** team into the appropriate teams

- Select the target Team and click the **Add** icon.
- In the **Add to team** page now displayed, use the column **Sort or Filter** options, to locate and select the users that you wish to add.
- Select the users and click the **Move** button, to remove the selected users from their original team and place them into the target team.



To move users between any other teams

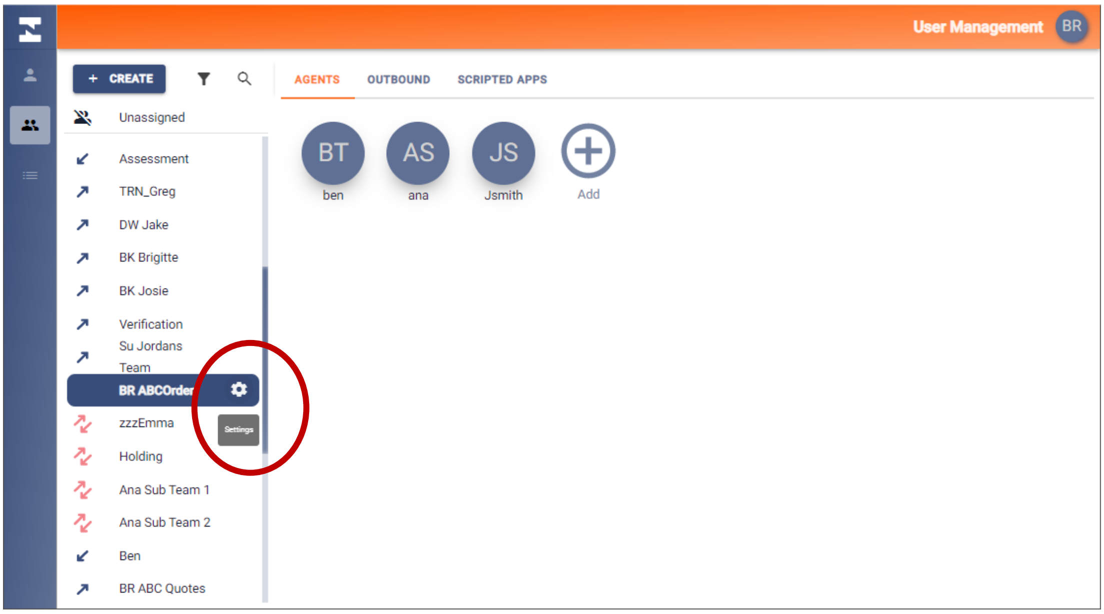
- Use the Team **Filter** or **Search** options, to locate the users in their current team.
- **Drag the user icons** from the original team into the target team, to change the user's team assignment.



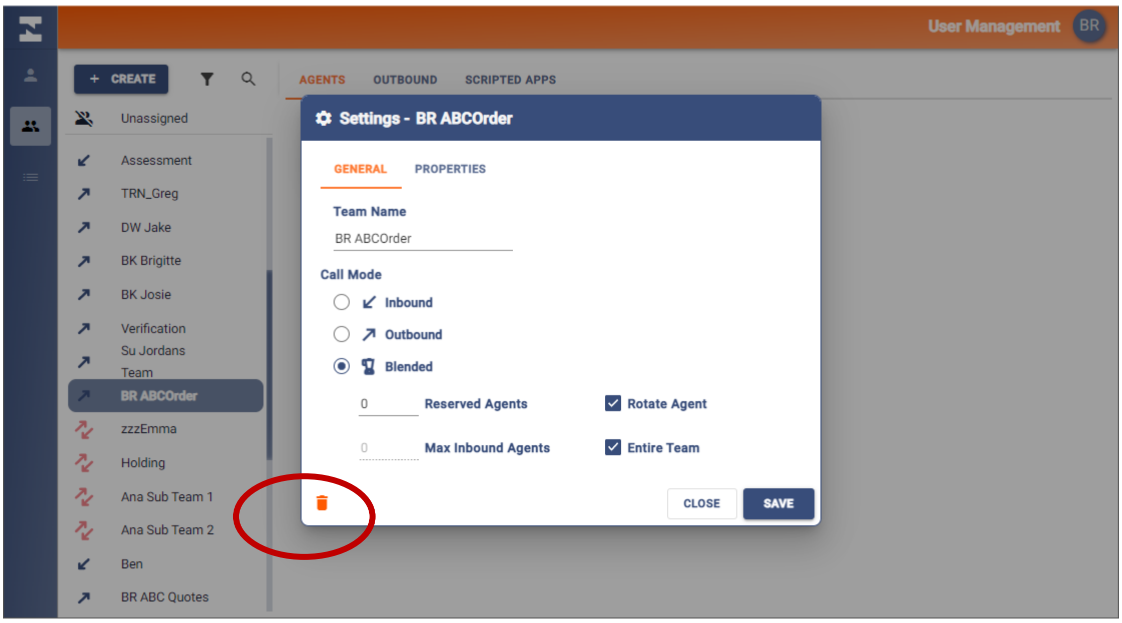
Editing Team Settings

To make any changes to a team's general or property settings

- Use the **Filter** or **Search** options, to locate the relevant team in the **Teams** dialog of the Noetica User Management.
- Select the Team name, and click the **Settings** icon, to open the Team Settings page.



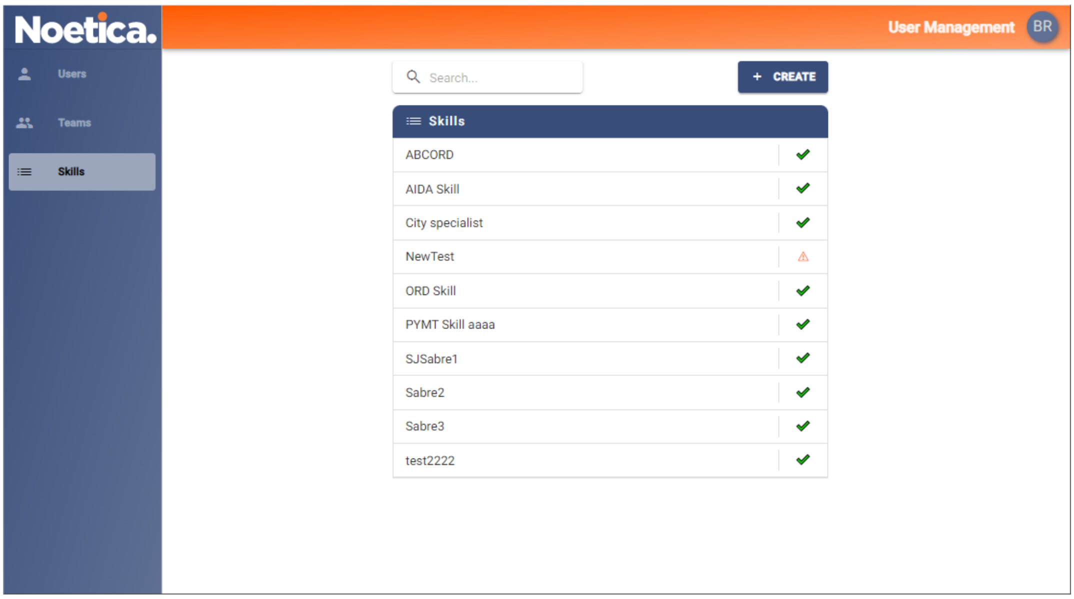
- In the **Properties** page, change or add any switch specific details, as required.
- In the **General** page, make any changes, as required, to the Team Name, Call Mode and Blending settings.
- To **Delete** a team without assigned members (users, scripted apps, lists or groups), click the red bin icon at the bottom left.



SKILLS

Skills are created, updated, and deleted in the **Skills** dialog of the Noetica User Management.

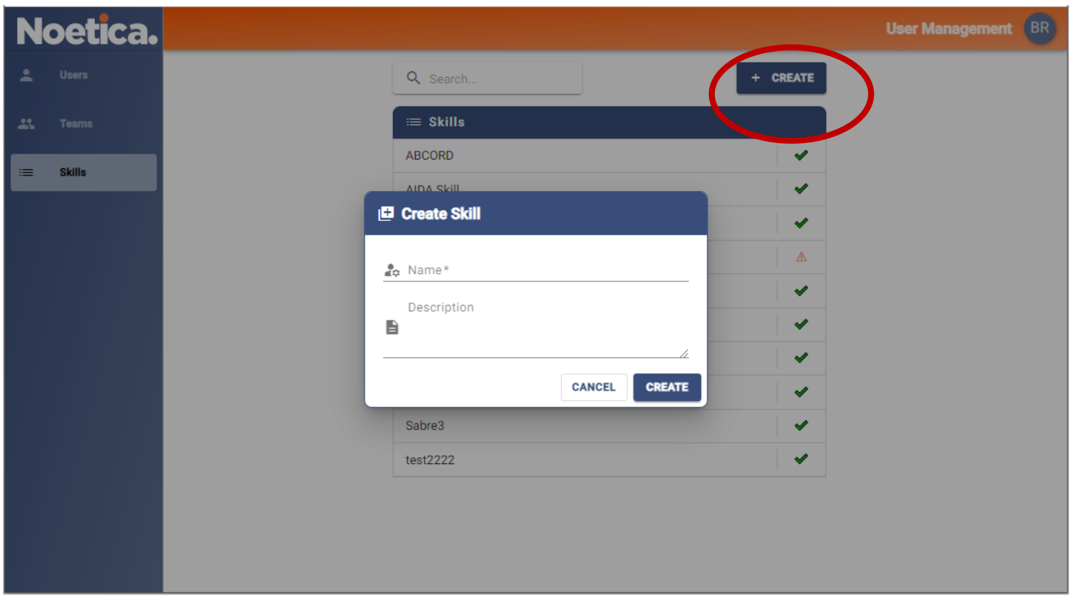
Existing skills are assigned to users in the **Users** page (Skills section) and they can be applied in the Campaign Manager and the Route Manager, to enhance call routing for Inbound and Outbound campaigns.



Creating new Skills

To add a new skill

- Click the **Create Skill** button at the top right of the **Skills** dialog.
- Enter a unique name for the new skill into the **Name** field.
- Add a brief comment into the **Description** field, to describe the skill.

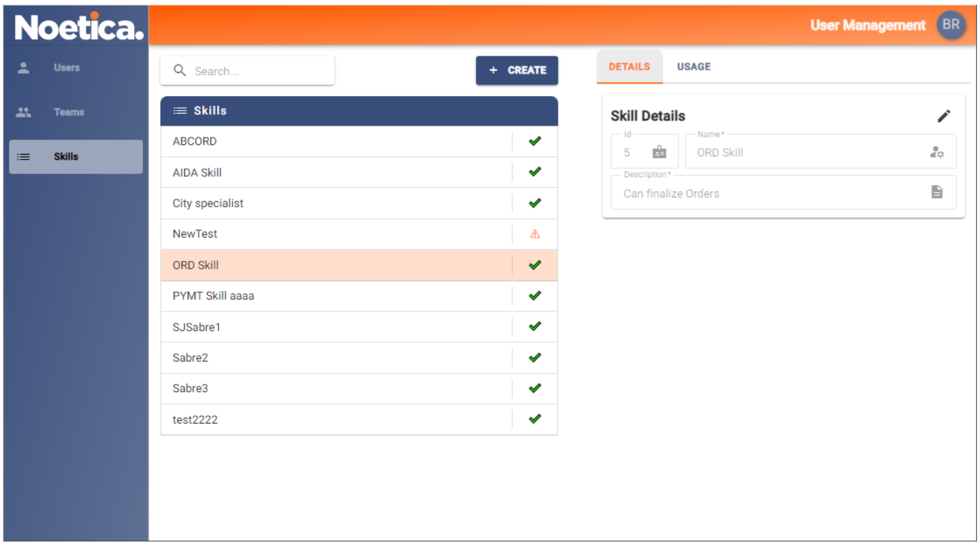


Skill Details and Assignments

When selecting an existing skill, you can check and edit details in the **Details** section and view current skill assignments in the **Usage** section.

Viewing and Editing Details

- Select the relevant skill and click the **Details** button.
- To change the skill name and description, click the **Edit** icon, then Save.
- Use the Delete icon, if you wish to delete a selected unassigned skill.



Viewing Usage

To view skill assignments, to see which agents, outbound campaigns, groups, call lists and routing strategies are currently using the selected skill

- Select the relevant skill and click the **Usage** button.
- Click the **Agents, Campaigns, Groups, Lists** and **Strategies** heading in turn, to show current skill assignments.