

SYNTHESYS MANAGEMENT TEAMS

The screenshot displays the 'Teams' management interface in Noetica Synthesys Management. The top navigation bar includes 'Teams', 'User Management', and 'Applications'. A user greeting 'Welcome brigitte' and a 'logout' link are visible in the top right. The left sidebar lists various teams under the 'Teams' heading, including 'Global', 'B test', 'BR Order', 'BR OrderSub Team', 'BR Team Membership', 'Client Services', 'KIM2', 'KimTest', 'Mani CM Testing', 'Multi Entity', 'Pauls', 'SuDemo', and 'V2018 Testing'. The main content area shows a grid of team members, each represented by a person icon and a name. The 'Admin' team is highlighted, and a message above the grid states: 'Team Manager: This Team has not been assigned a Manager.' The grid contains the following members: Admin, Alli, AndrewM, automatic, Bev, brigitte, BrigitteR, Danny, elinapuro, elltest, emmanuel, Frederic-baud, fred-jones, fred-smith, gerbil, GMolyneux, guy, happy, IWeeverink, Jaros, jim, Kelly, lalo, Laurence, Lawrence, Lesley, LesleyM, Luke, m2, m3, mani, marky, martin, matt, Münchenf, Oleg, oran, Paul, peppe, RMcDonald, Roxy, rScheimann, sam, Sharon, su, suj, test, Test1, Testing43, TestingEI, Upgrade, vim, wendy, yagna, zara, Amend Customer, BBCOrderRe view, SpecialOffers, ABCOrderGroup1, ABC ORDER LINE - ABCOrderRe view, ABC ORDER LINE - ABCOrderSurvey, CRM Test1Data, CRMTTest, and Customer Consulting.

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SYNTHESYS MANAGEMENT TEAMS

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Introduction

Teams are essentially workgroups. Each team will be assigned to a manager who is responsible for the team and contains users, i.e. team members fulfilling different roles and work objects, such as *Scripted apps*, *Cases Inboxes* and *Outbound Call Lists*.

- Teams of users.
- Individual users.
- Scripted apps, also referred to as webflows.
- CRM definitions.
- Outbound Lists.
- Cases Inboxes.
- Further object types.

Users and User Roles

User roles such as agents, team leaders, supervisors, administrators, or additional roles that can be created as required, come with a set of permissions reflecting a person's role within the company and the tasks that they will have to carry out.

Each user has a primary team reflecting their line of reporting, and depending on the system set up, can also belong to other teams. **Team managers and supervisors** in the topmost or higher team also have the permissions associated with that role in teams lower down the hierarchy. Accordingly, they can supervise other lower teams, even if they are not in those teams directly.



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

Work Assignment

Work is assigned to individuals by having the relevant work object in their team. So for example:

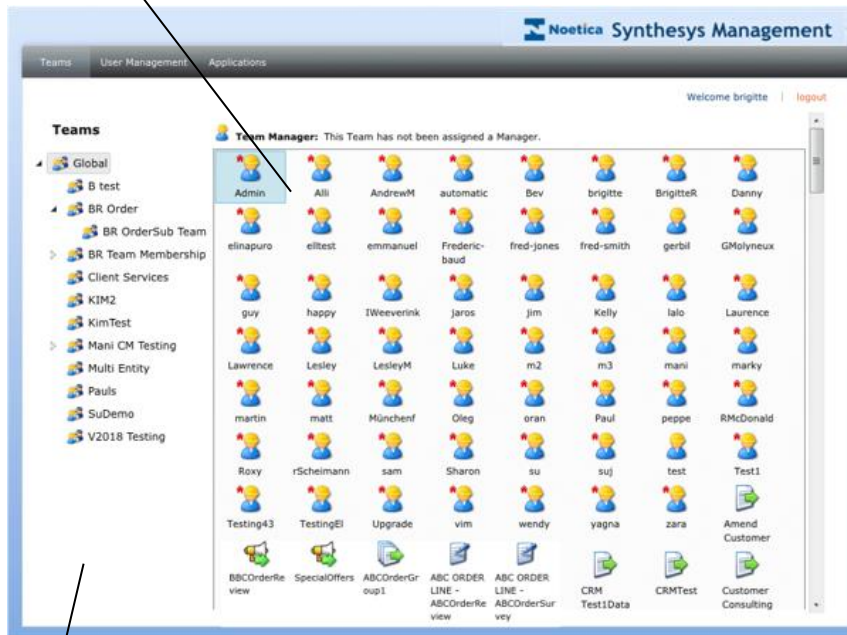
- If a Scripted app is in an agent's team, then the agent has permission to work that Scripted app.
- If a cases inbox is in an agent's team, then the agent will be assigned cases from that inbox.

Starting Synthesys Teams

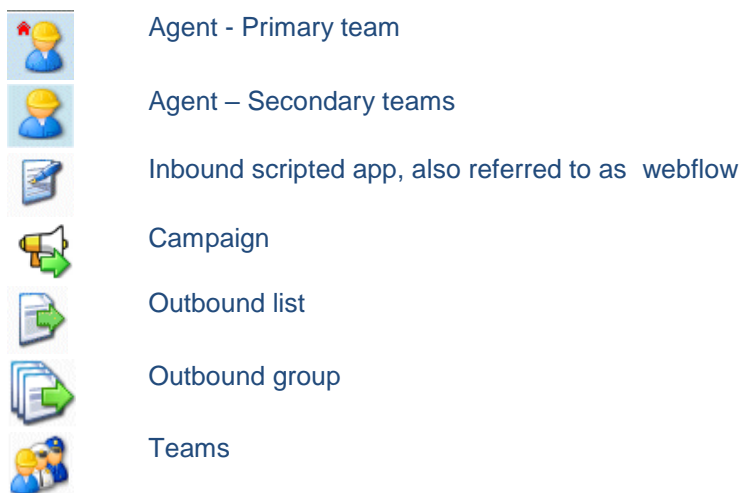
Initially Synthesys Teams will display the **Global Team**, listing all users registered in Synthesys and all campaigns (Inbound scripted apps & Outbound call lists) that have been created in Synthesys:

- Click the **Teams** tab at the top of the **Synthesys Management** screen.

Teams displaying users, scripted apps, outbound call lists & subsidiary teams for a selected team and the name of the team manager, if assigned



A list showing the *Global team* and any other teams that have been created



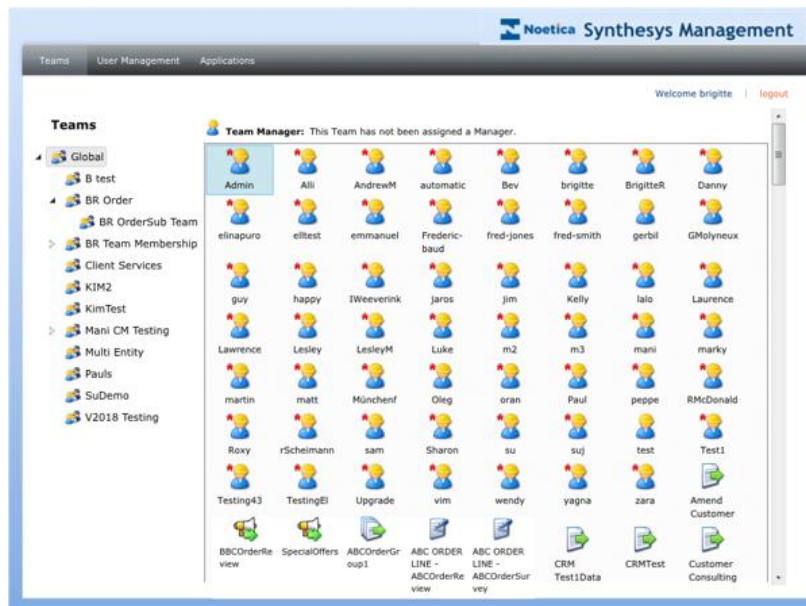
The following section will give information about setting up **New Teams** and show how agents and campaigns can be added and removed.

ADDING NEW TEAMS

Any number of teams can be set up in the **Teams** page, to allow the grouping together of specific agents and work objects, such as scripted apps and outbound lists.

To set up a new team, initially under the *Global* team, and subsequently under any other existing teams:

- Click the **Teams** tab at the top of the **Synthesys Management** screen.
- Locate and right click on the team under which you want to set up the new team and select **New Team** from the menu.



In the **New Team** dialog:

- Type the name for your new team into the **Team Name** field.
- Add a caption or brief description into the Team description field.
- Select the person that is to manage the team, from the **Manager** list.

New Team

Please enter the name of the new team and select a manager:

Team name:

Team Description:

Manager:

- ade jones
- Happy Administrator
- alan smithy
- Amina Group
- Arthur Teacake
- bert ernie
- Brigitte Reimer

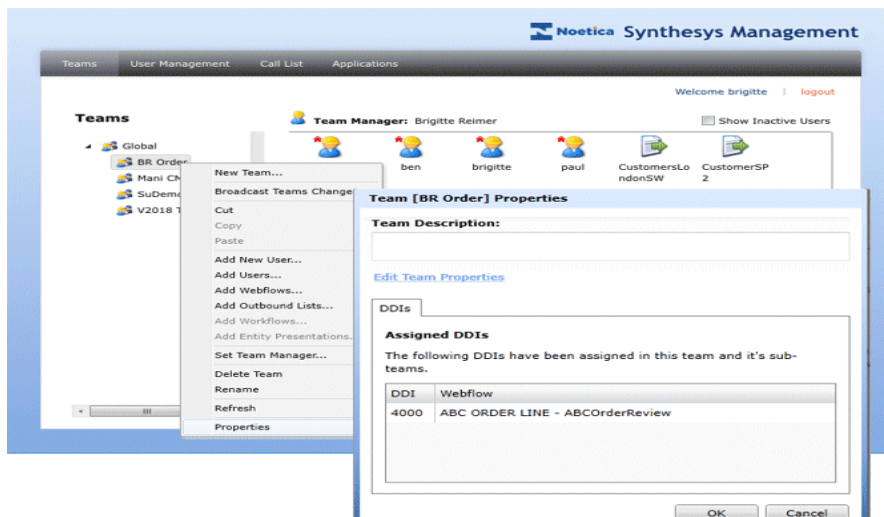
Editing Team Properties

Clicking the **Edit Team Properties** link, you can configure additional team properties, such as the CLI to present, or switch specific settings.

To enable active blending when using Synthesys with the Mitel MiVB platform for example, you need to specify the Mitel ACD Paths in the Synthesys Team Properties dialog. The Mitel CTI interface will monitor all Mitel ACD paths assigned. When an inbound call arrives into one of the monitored ACD paths, the Predictive Dialler will be notified and an agent from the corresponding team will be made available to take the waiting inbound call.

To set up the Team properties

- Open Synthesys Management, right click on the relevant team in the tree structure on the left of the Teams dialog, and select **Properties**.
- In the Team properties dialog, click the **Edit Team Properties** link.



The options available in the *Property Editor* section will depend on your installation and switch configuration.

- Add the Mitel ACD paths (i.e. the DDI number that is used to direct the inbound calls to agents), and any other properties, as required, into the associated **Value** fields and click the **Save** button.



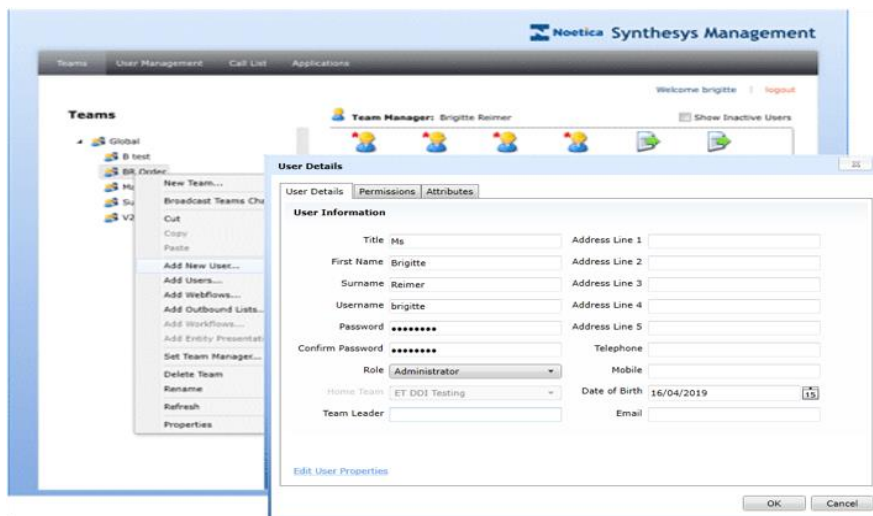
If Multiple Telephony Platforms are installed, you will be able to select the relevant platform for the team via a drop-down list.

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 NEW USERS TO TEAMS

New users can be added in the User Management section, or in Teams. To create a new user in teams:

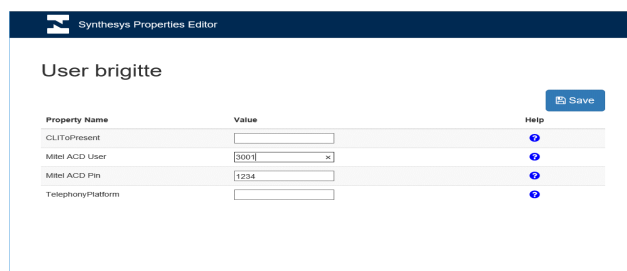
- Click the **Teams** tab at the top of the **Synthesys Management** screen.
- Right click on the Team into which you want to place the user and select **Add New User** from the menu.
- Enter the personal details and login details for the new user and select a role, a primary (home) team and add a team leader, as required.
- Click the Permissions tab, to assign the required access permissions for the user.



Editing User Properties

Clicking the **Edit User Properties** link, you can configure additional user properties.

The options available in the Property Editor section will depend on your installation and switch configuration and may include, for example, the CLI to present, the Mitel ACD User and Mitel ACD Pin and switch specific settings.



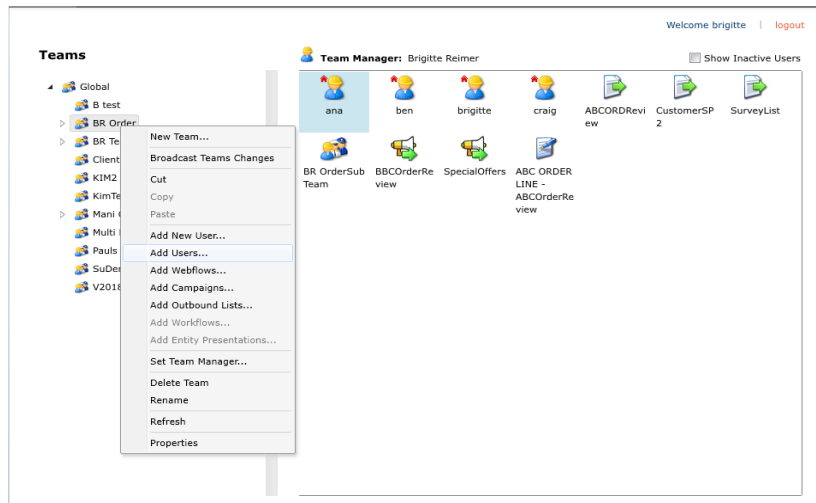
If Multiple Telephony platforms are installed, you will be able to select the relevant platform for the user via a drop-down list.

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) then the user will be able to select the Telephony Platform to be used from a drop-down menu.

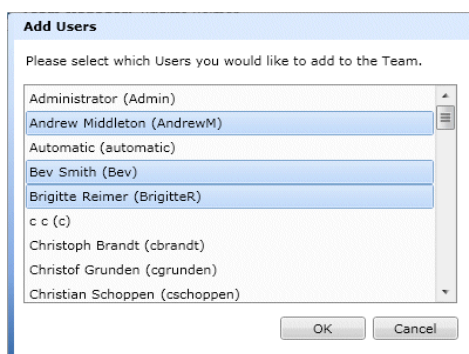
Copying Users to a Team

If you copy users to another team they will remain in their original team(s) as well, unless they are removed from these teams. To copy specific users/ agents to a team:

- Click the **Teams** tab at the top of the **Synthesys Management** screen.
- Locate and right click on the relevant team and select **Add Users** from the list.



- In the **Add Users** dialog, select the agents to be copied to the selected team.



Holding down the Ctrl key enables you to select multiple names.

- Click **OK** to add the agents to the team, or **Cancel** to cancel the action, without saving the changes.
- For team changes to take effect instantly, without agents having to log off and back on again to pick up changes, click the **Broadcast Teams Changes** option.

Multiple Team Membership

It is only possible for users to belong to more than one team, if the system has been configured to allow multiple team membership.

Please contact your system administrator for more information.

PRIMARY TEAMS

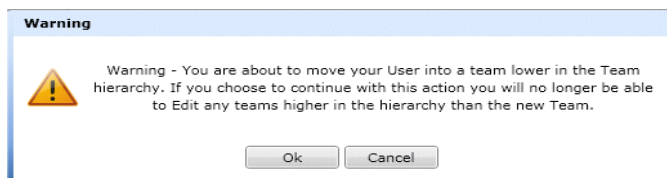
The user  icon shows that a user or agent is displayed in his/her primary team.

Users can be represented in multiple teams, provided that the system has been configured accordingly, but the primary team reflects their line of reporting.

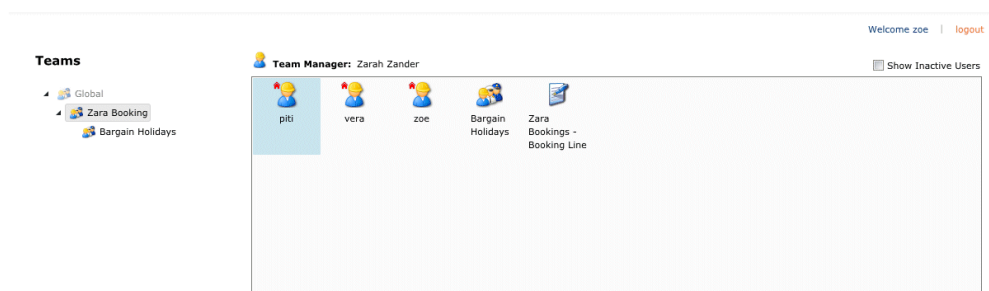


Users, unless they have Administrator permission, will only be able to see or edit teams of which they are members or teams that are lower in hierarchy to their current teams.

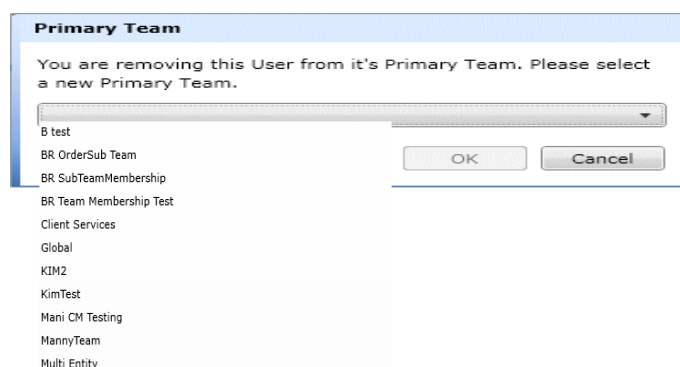
A message to this effect will be displayed when users that are currently logged in move themselves into a lower team.



The user in our example can only see her current team and teams lower in the hierarchy.



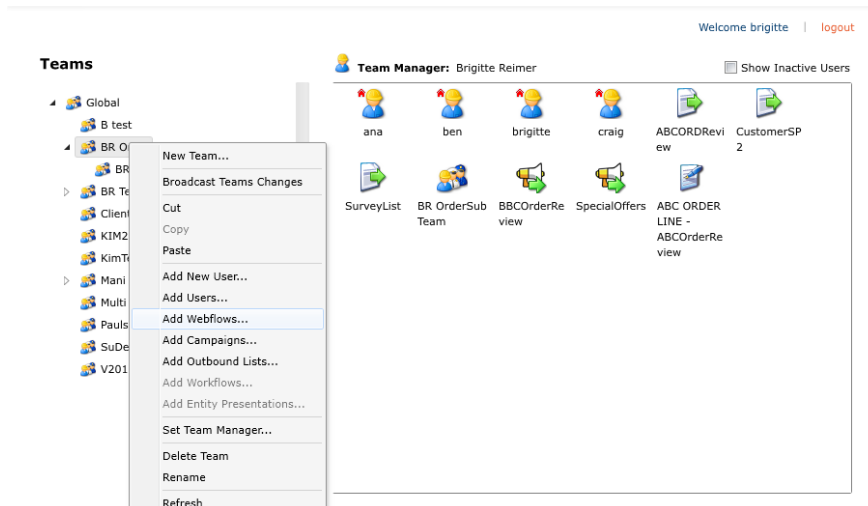
When removing a user from his/ her primary team, a message will prompt you to select a new primary team for that user.



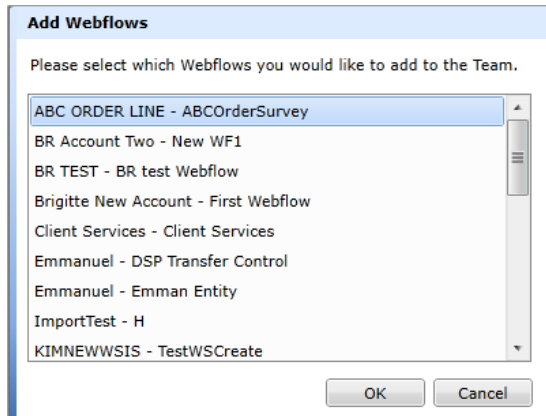
Copying Scripted Apps and Call Lists to a Team

To add specific scripted apps and/ or outbound lists, to a team:

- Click the **Teams** tab at the top of the *Synthesys Management* screen.
- Locate and right click on the relevant team and select **Add Webflows** or **Add Outbound Lists** from the list subsequently displayed.



- In the **Add Webflows** or **Add Outbound Lists** dialog, select the Scripted app(s) or Outbound list(s) that you wish to add to the selected team.



- Click **OK** to add the scripted apps or outbound lists to the team. Click **Cancel** to cancel the action, without saving the changes.



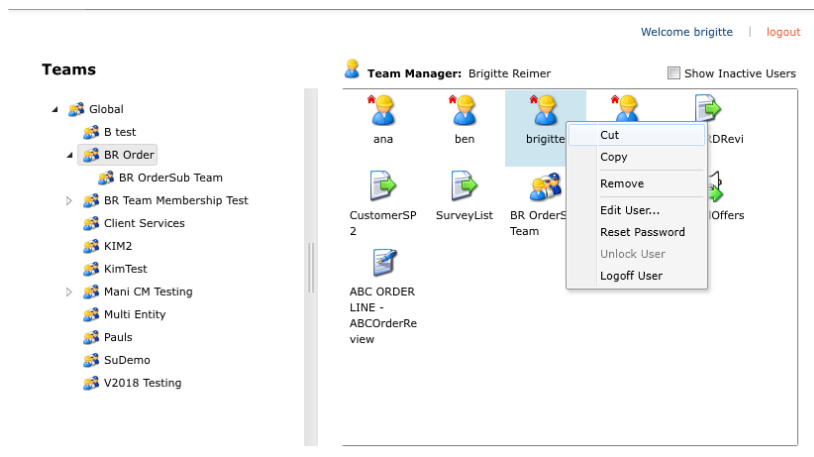
Work Objects that have been copied will remain in their original team(s), as well as being part of the new team.

For team changes to take effect instantly, without agents having to log off and back on again to pick up changes, click **Broadcast Teams Changes**.

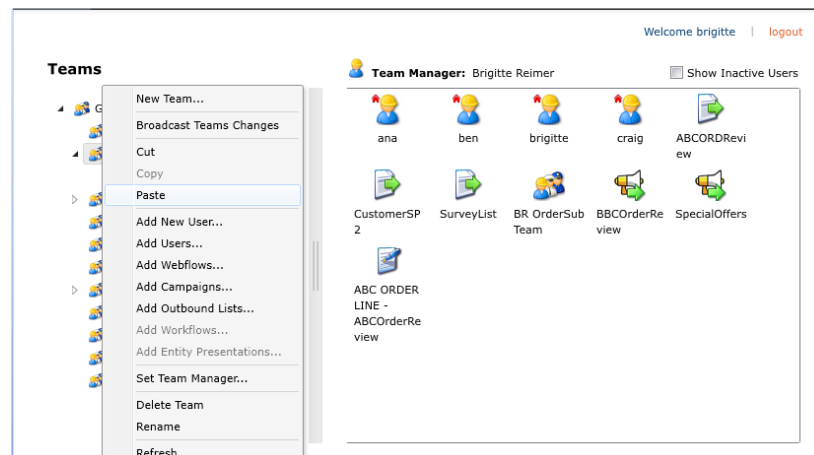
Using Cut & Paste to move Users & Work Object

Use the *cut and paste* option, rather than copy and pasting, to assign agents or work objects (scripted apps, outbound lists, workflows and entity presentations) to a specific team, without these remaining in the original team(s).

- Click the **Teams** tab at the top of the **Synthesys Management** screen.
- Select the relevant source team, to display its content on the right-hand side.
- Locate and right click on the relevant user or work object. To select multiple team members, use Ctrl and/or Shift key.
- Select **Cut** from the drop-down list.



- Locate and right click on the destination team.
- Select **Paste** from the list displayed, to add the item to the selected team.



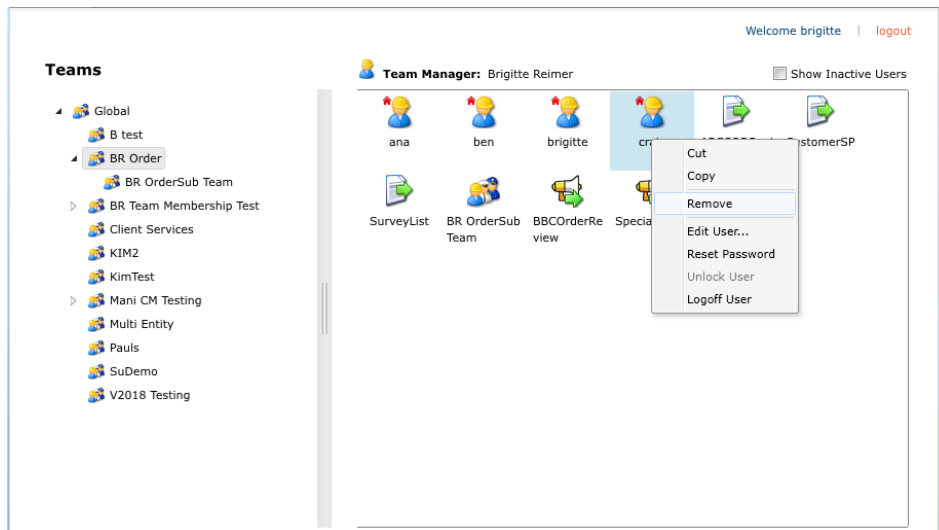
Users and work objects that are removed from a team using the **Cut & Paste** option will no longer be represented in that team.

For team changes to take effect instantly, without agents having to log off and back on again to pick up changes, click **Broadcast Teams Changes**.

Removing Agents and Work Objects

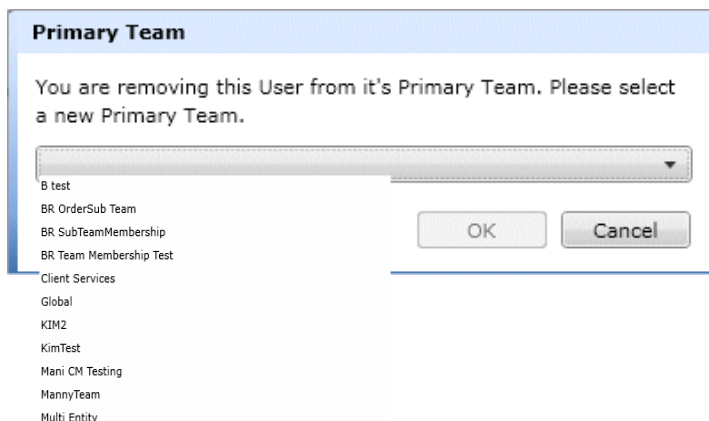
To remove specific agents, (callflows, outbound lists and groups) from a team:

- Click the **Teams** tab at the top of the **Synthesys Management** screen.
- Select the relevant source team, to display its content on the right-hand side.
- Locate and right click on the relevant user, scripted app or outbound list and select **Remove** from the list displayed. To select multiple team members, use Ctrl and/or Shift key



When removing a user from his/her primary team:

- Click on the arrow in the **Primary Team** message box displayed and select a new primary team into which to place the user.



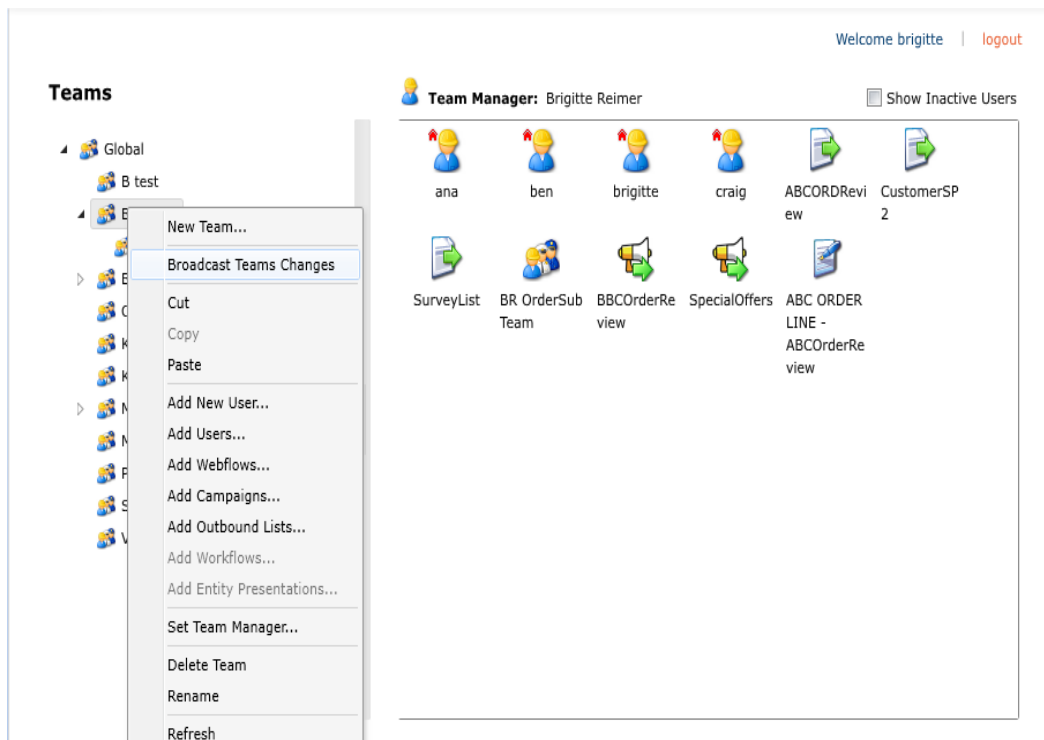
For team changes to take effect instantly, without agents having to log off and back on again to pick up changes, click **Broadcast Teams Changes**.

Broadcast Teams Changes

Historically, changes made to teams required an agent to logoff and logon again, to pick up the changes. Customers now have the option to use the system as before, i.e. setting up new teams assignments in advance of a new shift, which will take effect when agents log back in after a break, or to use the **Broadcast Teams Changes** option to broadcast the updates instantly, so that agents can pick up any changes directly, without having to log off and back on again.

To use the Broadcast Teams Changes option

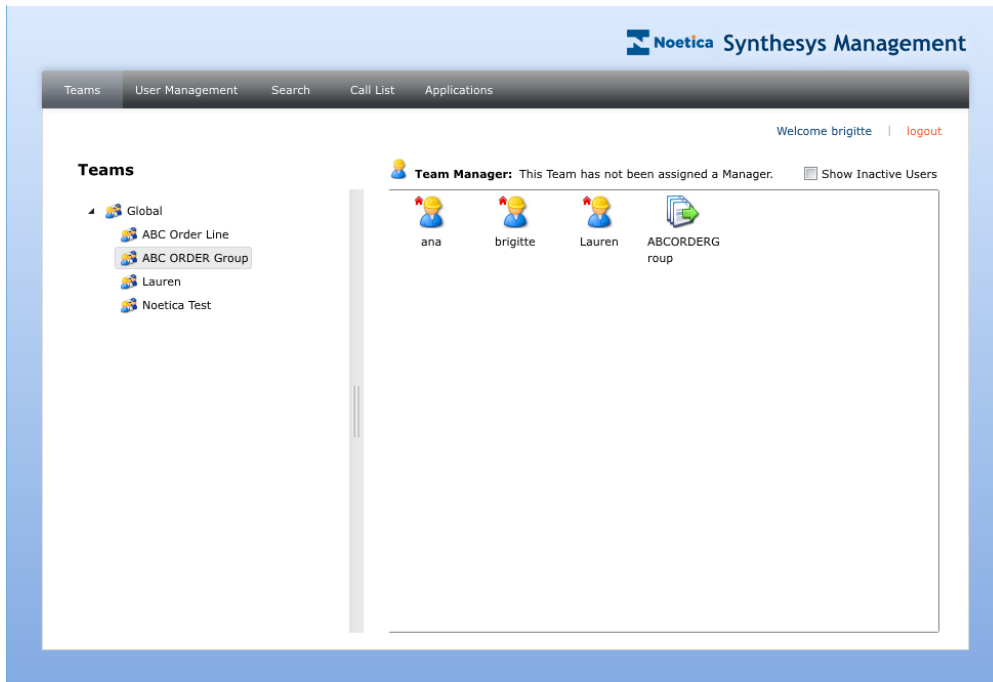
- Click the **Teams** tab at the top of the *Synthesys Management* screen.
- Locate and right click on the relevant team and select **Broadcast Teams Changes** from the list displayed.
- Any updates will now be broadcast, and the changes can be picked up immediately by the agents currently logged in to Synthesys.



TEAM SET-UP USING OUTBOUND GROUPS

Outbound Groups are used to present agents with a combination of calls from multiple call lists of multiple Outbound campaigns. The ratio of records presented from each list at run time is determined by the weighting set per list within the group.

- To use outbound groups, you need to ensure that the Group icon is in the team with the agents that are to make the calls.



You can also place the scripted apps (webflow)s and campaigns in this team, but it is not necessary.

If you want to keep the call lists that form part of the group in the same team as the group as well, you should assign a higher priority to the group, to ensure that the records presented are taken from the multiple lists within the group according to their weighting, rather than being presented and exhausted from an individual call list.

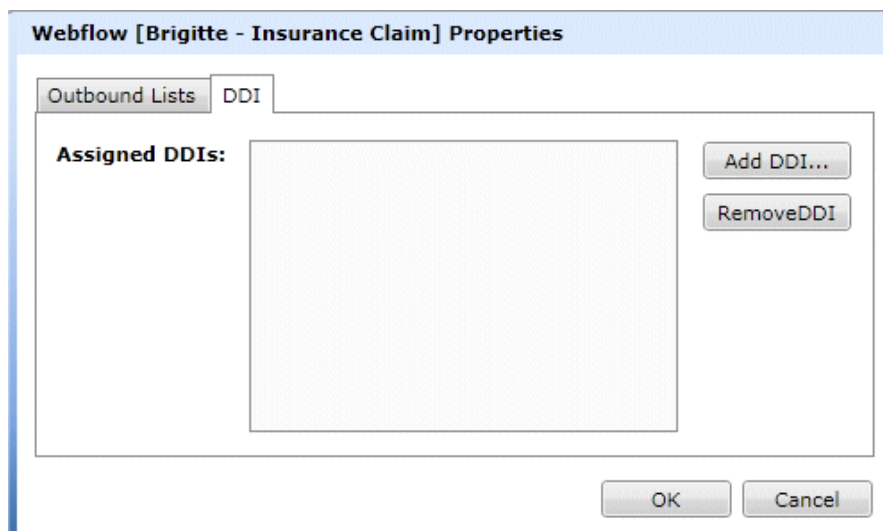
DDI MAINTENANCE

The *DDI* option in Synthesys Management is used for adding, modifying and deleting **DDI** (*Direct Dial In*) details.

Assigning DDI to an Inbound Scripted app

To assign a DDI number to an Inbound scripted app

- Right click on the relevant scripted app and select **Properties** from the drop-down menu to open the *Webflow Properties* dialog.
- Select the **DDI** tab to view DDIs currently assigned to the selected scripted app or to enter a new DDI.
- To enter a new DDI, click the **Add New DDI** button on the right of the dialog.
- Enter the DDI number to be used for the scripted app in the **Enter DDI** dialog.



- Click OK to save the DDI number entered.
- Click Cancel to close the dialog without saving the changes.

To remove an existing DDI number from the selected scripted app

- Select the DDI that you wish to remove and click the **Remove DDI** button.



A DDI can only be assigned to one Scripted app at a time. If the DDI entered has already been assigned, a message will be displayed: "The ddi <DDI Entered> has already been assigned to <Webflow Name>."

User then can either **Cancel** the current add DDI operations or select the

Change Assignment option to remove the assignment from the current campaign and assign the new campaign.