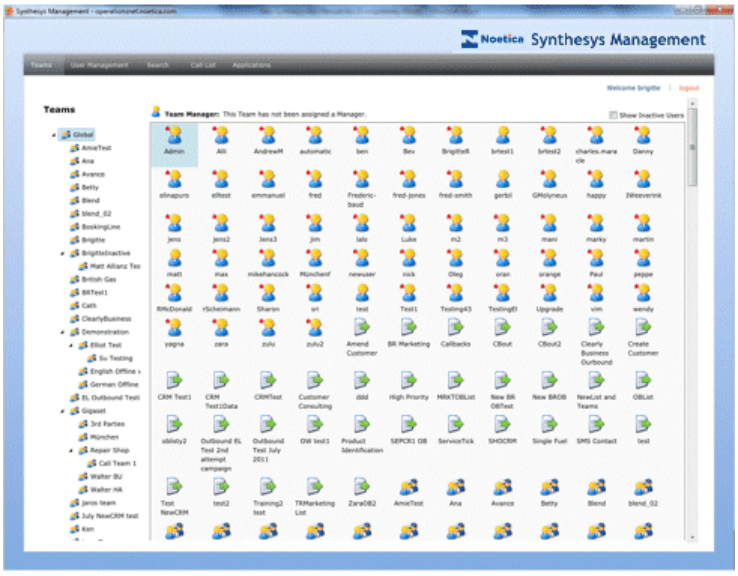
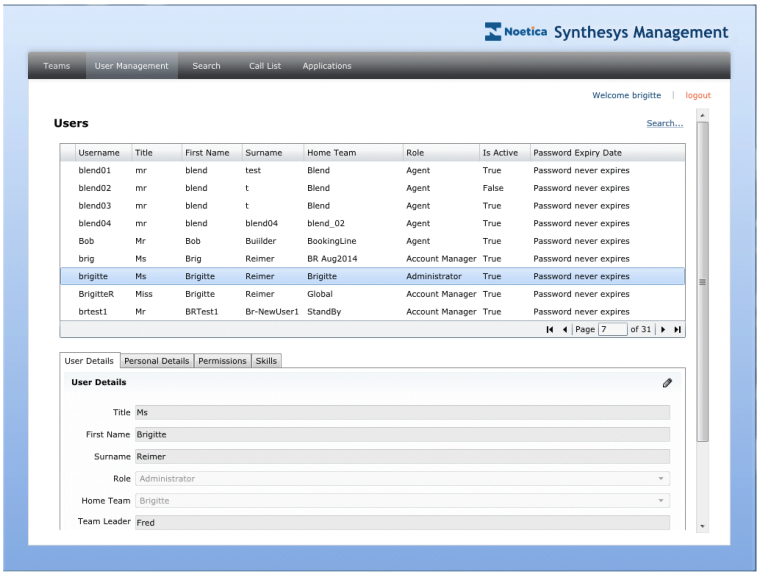
SYNTHESYS MANAGEMENT

Teams



User Management



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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 displays 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.

Synthesys Management Basics

Last updated April 2018

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SYNTHESYS MANAGEMENT

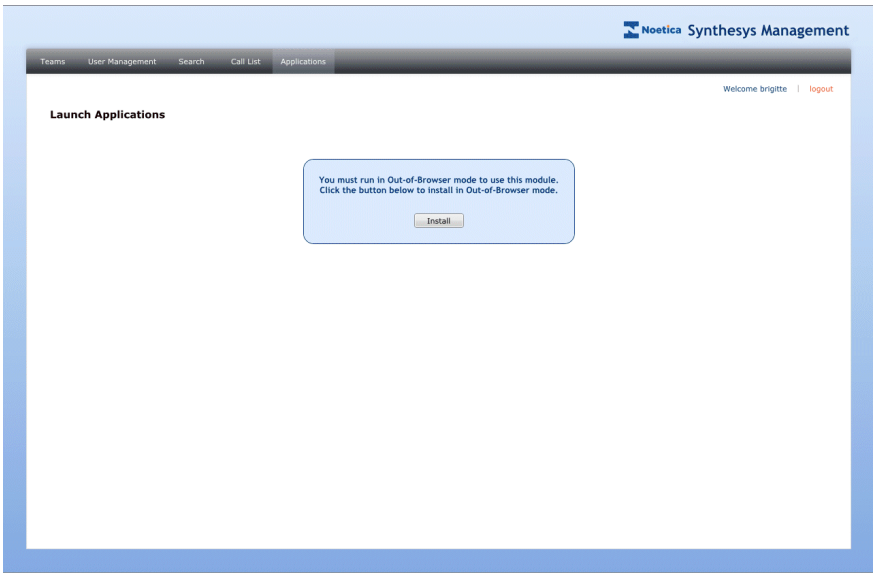
Synthesys Management is a Silverlight application, hosted on a web page or on the desktop.

The interface consists of a launch page with a number of applications, currently including *Synthesys User Management and Synthesys Teams.*

Users that wish to use the Applications tab to launch CRM and Outbound functionality need to **install** Synthesys Management onto their local machine.

To install Synthesys Management

- Enter the *URL address* into the *Address* field of the Web Browser
- Log on and select the ***Applications*** tab.
- Click the ***Install*** option to install Synthesys Management to the desktop.



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Synthesys Management Features

The access available to users in Synthesys Management depends essentially on the permissions that have been assigned to the individual users.

Users with full administration rights will currently have permissions to set up and maintain user accounts and permissions, manage teams and view and manage call lists.

Option	Description
Teams	Are groups that contain users, i.e., team members fulfilling different roles and work objects, for example Scripted Apps, *Cases Inboxes,* and *Outbound Call Lists*. If the system is ***Active Directory*** enabled Synthesys Management users will be able to import Synthesys users directly from the company's Active Directory.
User Management	Depending on the permission rights assigned, allows users to set up and maintain user accounts, adding and editing user details, permissions and passwords. Using ***Active Directory***, users will be managed directly through Active Directory, rather than in Synthesys. Please see the section on *Active Directory Integration* for more information.
DDI Maintenance	Adding and maintaining DDI numbers for Inbound scripted apps.
Search	Enables the advanced user search, based on user skills and attributes.
Call List	The *Call List* option in Synthesys Management enables users to view and manage *Unprocessed, Held* and *Parked* calls.
Applications	Allows users to launch CRM, Outbound Wizard, Outbound, Reports and Live Monitor for the creation and management of customer data and outbound call lists. Users that wish to launch applications, to allow use of Customer Relationship Management and Outbound functionality need to install Synthesys Management on their local machine.

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User Login

To access the Synthesys Management application, either to an in-house server or an outside website, users need access to a Web Browser and the relevant URL address.

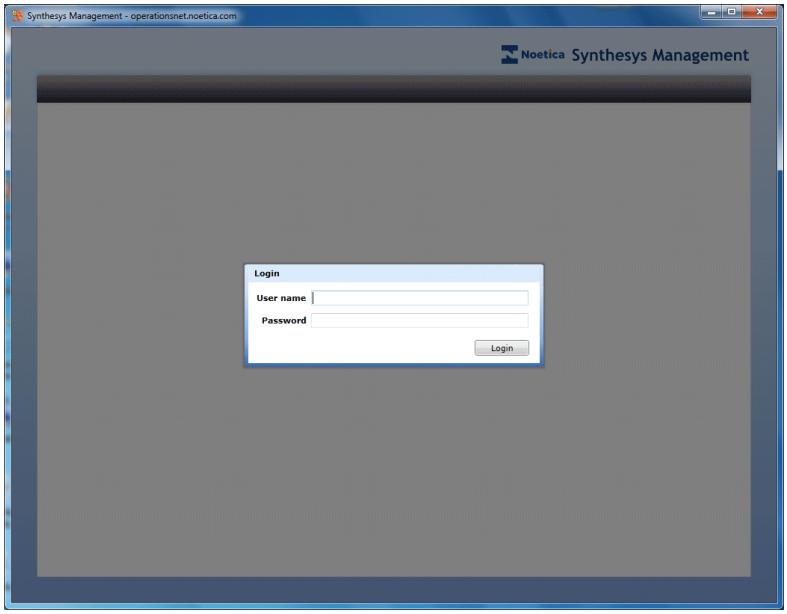
- Enter the URL address into the Address field of the Web Browser.

http://servername/Management/Synthesys.Management.ApplicationTestPage.aspx#/Login

Alternatively, if you wish to launch the *Customer Relationship Management* and *Outbound* applications

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.

The next step is to log on to the system.



- Enter your User Name and Password as they have been set up for you.
- Click the Login button.

If you have not received the required URL address or your User Name and Password, please contact your System Administrator. If the secure password option is used, remember to enter at least 10 characters, including a number between 0-9 and one of the special "-_?!%&*#%$§" characters.

Using **Active Directory** integration, users will be logged on automatically.

The Synthesys Management main screen will open.

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Synthesys Management Main Screen

From the **Synthesys Management** main screen users can access a range of different modules.

The access permissions available to the individuals logged on reflect their role within the company and the tasks that they will have to carry out.

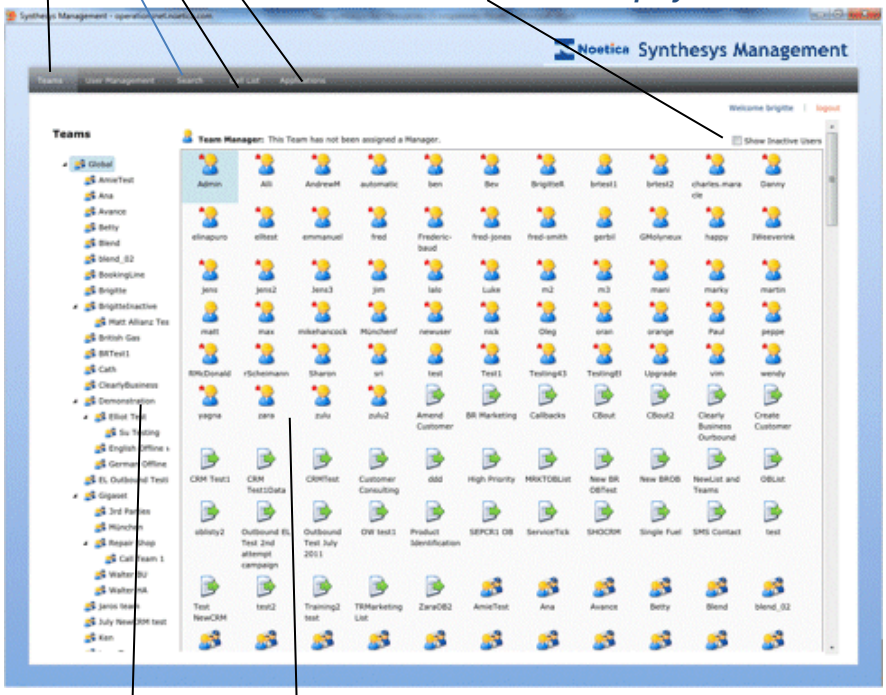
Teams and **User Management** tabs, to open the *Teams* and *Users* pages

Search tab, enables skills based user search

Call List tab, to view and manage unprocessed, parked and held calls

Applications tab to launch CRM and Outbound modules

Tick box to ***display inactive*** as well as active users



Teams section, showing the *Global team* and any teams that will be created subsequently

Users, campaigns and **teams** that have been set up in Synthesys

For more information, please take a look at Synthesys *User Management* and Synthesys *Team.*

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