Synapse-Conectiv
SERVICE LEVEL GOVERNANCE

Multi-Role Training Guide

A structured onboarding curriculum for every role in Synapse-Conectiv — hands-on exercises, real scenarios, and a knowledge check for Administrators, Service Delivery Managers, Client Stakeholders and Customer Portal users.

LEARNING TRACKS	TOTAL TIME	EDITION
4	~3 hrs	v1.0

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How to Use This Guide

This is a **training curriculum**, not a reference manual — it's built to be worked through once, in order, either solo or as part of a run onboarding session. Each role has its own track with learning objectives, hands-on exercises marked ● **TRY IT YOURSELF**, and a knowledge-check checklist at the end.

Once you've completed your track, keep this guide's companions close by for everyday use: the **User Guide** for on-demand feature lookup, and the **Administrator Guide** for configuration reference. This guide teaches you the app; those two are what you'll actually reach for six months in.

What you'll need

- A Synapse-Conectiv login for the role (or roles) you're training — ask an Administrator if you don't have one yet.
- About 15 minutes for the shared fundamentals, plus your role's track (10–60 minutes depending on role).
- An authenticator app on your phone if you want to try the MFA exercise (entirely optional — you can Skip for Now).

Learning path overview

Track	Who it's for	Modules	Time
Shared Fundamentals	Everyone	2	15 min
Administrator Track	Admins	4	45 min
SDM Track	Service Delivery Managers	6	60 min
Client Stakeholder Track	Client Stakeholders	3	20 min
Customer Portal Track	Portal users	2	10 min
Cross-Role Scenario Workshop	Everyone (recommended)	1	30 min

> Training an Administrator or SDM? They should complete *every* track that role has visibility into — an Administrator, for instance, benefits from working through the SDM track too, since Admins can see and do everything an SDM can.

Shared Fundamentals

CLIENT STAKEHOLDER TRACK

15 MIN

Before You Start

Everyone completes this module first, regardless of role.

APPLIES TO **ADMINISTRATOR** · **SDM** · **CLIENT STAKEHOLDER** · **PORTAL**

Learning objectives

[ ] Sign in and understand what happens on first login.

[ ] Recognise the four roles and know which one you have.

[ ] Find your way around the sidebar and (if applicable) the client selector.

Module F1 — Signing in & MFA

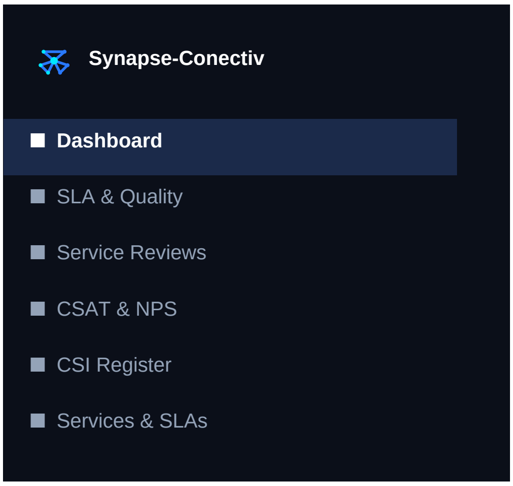
Every role signs in from the same screen. First-time logins are offered MFA enrolment via a QR code; you can activate it immediately or select **Skip for Now**.

● TRY IT YOURSELF — Sign in for the first time

1. Go to the Synapse-Conectiv sign-in page and enter your assigned username and password.
2. If you're offered an MFA QR code, either scan it with an authenticator app and enter the 6-digit code to activate it, or select **Skip for Now**.
3. Confirm you land on the Governance Dashboard (Admin / SDM / Client Stakeholder) or your service page (Customer Portal).

Module F2 — Navigating the App

Admin, SDM and Client Stakeholder accounts share a sidebar-and-content layout. The sidebar only ever shows the areas your role can access.



● TRY IT YOURSELF — Find the client selector

1. Look at the top of the page — Admins and SDMs see a dropdown listing every client account.

> 2. If you have one, switch to a different client and confirm the page content changes to match.
>
> 3. Client Stakeholder and Customer Portal accounts don't have this control — if that's your role, confirm instead that the page header already shows your organisation's name.

Checkpoint

[ ] I can sign in and I understand my MFA status.

[ ] I know which of the four roles my account has.

[ ] I can find my way to any area listed in the sidebar for my role.

Administrator Track

ADMINISTRATOR TRACK

45 MIN

Running the Platform

Provisioning accounts, users, portal access, and system settings.

APPLIES TO **ADMINISTRATOR**

Learning objectives

[ ] Create and configure a client account, including SLA targets and Cyber Services.

[ ] Create each of the four user types, including the fields unique to each.

[ ] Grant Customer Portal access end-to-end, using both required steps.

[ ] Change the system-wide currency and check MFA enrolment across your users.

Module A1 — Provisioning a Client Account

Client accounts are the top of the hierarchy — everything else (services, reviews, CSAT, CSI, users) hangs off one.

● **TRY IT YOURSELF — Create a test client account**

1. Open **Client Accounts** and select **New Client**.
2. Give it a name (try “Training Co — Delete Me”), an industry, a contract reference, and today's date as the contract start.
3. Leave the default SLA targets in place and save.
4. Confirm the new account appears in the client selector immediately, with no history yet.

Module A2 — Managing Users & Access

Role	Extra field required
Administrator	None
Service Delivery Manager	None
Client Stakeholder	A Client Organisation
Customer Portal User	A portal-enabled Service

● **TRY IT YOURSELF — Create an SDM and a Client Stakeholder**

1. Open **Users & Access** → **New User**. Create a Service Delivery Manager with a username, name, email and password.
2. Repeat, this time choosing Client Stakeholder — pick the training account from Module A1 as its Client Organisation.

3. Open the Client Stakeholder account you just made and confirm the **Status** field shows Active, and the **MFA** column shows Pending.

Module A3 — Granting Customer Portal Access

This always takes two separate actions — a service-level toggle, then a tenanted login:

1. Enable the toggle	→	2. Create the login	→	3. Customer signs in
Services & SLAs		Users & Access		Sees only that service

● **TRY IT YOURSELF — Provision a portal login end-to-end**

1. In your training client account, open **Services & SLAs** and create a new service.
2. Open it and switch on **Enable Customer Portal**.
3. Go to **Users & Access** → **New User**, choose Customer Portal User, and confirm your new service now appears in the picker.
4. Create the login, then sign in as that user in a private browser window and confirm you see only the one service, with no sidebar.

Module A4 — System Settings & Security

● **TRY IT YOURSELF — Change the currency and audit MFA**

1. Open **Admin Settings** and switch the currency, then open **CSI Register** for any client and confirm the symbol changed.
2. Switch it back.
3. Open **Users & Access** and scan the MFA column for any account still showing Pending — in a real rollout, this is your follow-up list.

Knowledge check

[ ] I created a client account and understand what each SLA target field controls.

[ ] I created all four user types and know which extra field each one needs.

[ ] I can explain why enabling a service's portal toggle alone doesn't grant anyone access.

[ ] I know where to look to see who hasn't enrolled in MFA yet.

Scenario: A Monday Morning at Synapse-Conectiv

Alex Novak ADMINISTRATOR

It's Monday morning, and Alex has two things in the inbox: a new client just signed, and Meridian Financial Group wants their new Trading Systems Monitoring service opened up to their own ops team via the Customer Portal. Alex creates the client account first — name, contract reference, SLA targets from the signed agreement — then hands it to the assigned SDM by adding them as a user if they're not already in the system. For Meridian, Alex checks with the SDM that the service's portal toggle is already on, then creates a single Customer Portal login for the client's ops lead, tenanted to that one service. By 9:15, both requests are done — and neither took more than a couple of minutes.

Service Delivery Manager Track

SDM TRACK

60 MIN

Running Governance Day to Day

SLA data, reviews, CSAT, CSI, and custom service SLAs.

APPLIES TO **SDM**

Learning objectives

[ ] Read a client's Dashboard and know what each KPI is telling you.

[ ] Record monthly SLA figures and a custom service SLA actual.

[ ] Schedule a service review and manage its action item register.

[ ] Log a CSAT response and move a CSI initiative through its lifecycle.

[ ] Configure a service's custom SLAs and a client's CSAT collection schedule.

Module S1 — Your Morning Review Routine

Most SDMs start the day the same way: pick a client, scan the Dashboard, and note anything that's slipped since yesterday.

● **TRY IT YOURSELF — Read a Dashboard like an SDM**

1. Select a client account and open the Dashboard.
2. Identify the status colour on each KPI card — is anything At Risk or Breached?
3. Check the Open Action Items list for anything overdue.
4. Check whether a CSAT Due banner is showing, and if so, its status.

Module S2 — Recording SLA Data

● **TRY IT YOURSELF — Record a month's SLA figures**

1. Open **SLA & Quality** for a client and select **Record Month**.
2. Enter a period, Availability %, MTTR, FCR % and OLA Compliance %, plus incident counts.
3. Save and confirm the new month appears at the top of the register and in the trend chart.

Module S3 — Running a Service Review

● **TRY IT YOURSELF — Schedule a review and log an action**

1. Open **Service Reviews** and select **New Review**. Choose Monthly, set a date, and list attendees.

2. Open the review and select **Add Action** — give it a description, an owner, a due date and a priority.

3. Change the action item's status from Open to In Progress directly from the register.

Module S4 — CSAT & CSI

● **TRY IT YOURSELF — Log a survey response and move a CSI card**

1. Open **CSAT & NPS** and select **Log Response** — enter a period, respondent, CSAT (1–5) and NPS (0–10) score.

2. Open **CSI Register** and select **New Initiative** in the Proposed column.

3. Drag it into Active, then open it and update its status to Completed.

Module S5 — Services & Custom SLAs

● **TRY IT YOURSELF — Create a service-level SLA and record an actual**

1. Open **Services & SLAs**, open (or create) a service, and select **New SLA**.

2. Give it a name, a unit, a target value and a comparison direction (at least / at most).

3. Select **Record Actual** and log a value for the current period — confirm the status colour and trend chart update.

Module S6 — CSAT Collection Scheduling

● **TRY IT YOURSELF — Set a recurring CSAT schedule**

1. Open **Client Accounts**, open a client, and set the CSAT Due Schedule to “3rd week of month”.

2. Tick **Repeat automatically each month** and save.

3. Open **CSAT & NPS** for that client and confirm the status banner now shows a due date and colour.

Knowledge check

[ ] I can record a month's SLA figures and explain what each field feeds into.

[ ] I can schedule a review and manage its action items through to Completed.

[ ] I can log a CSAT response and explain how NPS is calculated from it.

[ ] I can define a custom SLA on a service and record a monthly actual against it.

[ ] I can set up a recurring CSAT schedule and explain repeatable vs. one-time.

Scenario: Preparing for a Quarterly Business Review

Sarah Jones SERVICE DELIVERY MANAGER

Sarah's Quarterly Review with Meridian Financial Group is in three days. She opens the client's Dashboard first to catch anything that's slipped, then works through SLA & Quality to make sure this month's figures are actually recorded — nothing kills a QBR faster than a gap in the trend chart. She checks the CSI Register for anything sitting in Completed that hasn't had its realized value logged yet, closes out a couple of stale action items from last month's review, and finally opens Executive Reports and downloads the PDF to send ahead of the meeting. Fifteen minutes, and the account is audit-ready.

Client Stakeholder Track

CLIENT STAKEHOLDER TRACK

20 MIN

Reviewing Your Service

A read-only view of your account, and how to prepare for a review.

APPLIES TO **CLIENT STAKEHOLDER**

Learning objectives

[ ] Read your Dashboard and understand what each KPI means for your account.

[ ] Download an Executive Report ahead of a meeting.

[ ] Review the action item register before a service review.

Module C1 — Your Dashboard

As a Client Stakeholder, you always see your own organisation — there's no client selector to worry about. Everything you see is read-only: identical data to what your Service Delivery Manager sees, minus the edit controls.

● TRY IT YOURSELF — Explore your Dashboard

1. Sign in and note the KPI row — Availability, MTTR, CSAT, NPS.
2. Open SLA & Quality and find the 12-month trend chart.
3. Open CSI Register and see which improvement initiatives are currently Active.

Module C2 — Reviewing SLA Performance & Reports

● TRY IT YOURSELF — Download an Executive Report

1. Open **Executive Reports**.
2. Read through the Service Level Snapshot and the Service-Level SLA Summary.
3. Select **Download PDF** and confirm it saves — this is the document you'd forward internally ahead of a review.

Module C3 — Preparing for a Service Review

● TRY IT YOURSELF — Check the action item register

1. Open **Service Reviews** and find the most recent completed review.
2. Read its summary and check the status of each action item — anything still Open or Overdue is worth raising at the next review.

Knowledge check

[ ] I can read every KPI on my Dashboard and know whether it's meeting target.

[ ] I can download an Executive Report PDF on demand.

[ ] I know how to check what's outstanding before my next service review.

Customer Portal Track

PORTAL TRACK

10 MIN

Your Service, At a Glance

A one-page, read-only view of a single service's SLAs.

APPLIES TO **PORTAL**

Learning objectives

[ ] Sign in and understand what you can (and can't) see.

[ ] Read an SLA card and its status.

[ ] Understand what the CSAT Due pill is telling you.

Module P1 — Signing In & Your Service Page

A Customer Portal login is tenanted to exactly one service. There's no sidebar and no client selector — signing in takes you straight to that service's page.

> **● TRY IT YOURSELF — Explore your service page**
>
> 1. Sign in with your Customer Portal account.
> 2. Read your service's name and description at the top of the page.
> 3. For each SLA card, note the current value, the target, and the status colour.

Module P2 — The CSAT Due Pill

If your Service Delivery Manager has scheduled a satisfaction survey cycle, a pill appears top-left, next to the logo:

● CSAT DUE 22 Jul	● CSAT DUE 15 Jul	● CSAT DUE 01 Jul
Not due yet. Today is before the scheduled date.	**Due.** The scheduled date has arrived, within 7 days.	**Overdue.** More than 7 days past due — pulses red in the live app.

> **● TRY IT YOURSELF — Check your CSAT Due status**
>
> 1. Look at the top-left of your service page.
> 2. If a pill is showing, note its colour and the date — green means not due yet, amber means due soon, and a pulsing red pill means it's more than 7 days overdue.
> 3. If no pill is showing, no survey cycle is currently scheduled for your account.

Knowledge check

[ ] I understand my login only shows one service, and why.

[ ] I can read an SLA card's status at a glance.

[ ] I know what each CSAT Due pill colour means.

Cross-Role Scenario Workshop

CROSS-ROLE TRACK

30 MIN

Seeing the Whole Loop

One account, four roles, one governance cycle — recommended for everyone.

Every track so far has trained one role in isolation. This workshop follows a single client account — Acme Global Retail — through one governance cycle, so you can see how each role's work connects to the next.

Alex Novak ADMINISTRATOR

Alex sets up Acme Global Retail as a new client account: SLA targets from the signed contract, Sarah Jones assigned as SDM, and — at Acme's request — the Customer Portal enabled on their E-Commerce Platform Hosting service, with a login created for Acme's own IT lead.

Sarah Jones SERVICE DELIVERY MANAGER

Over the following weeks, Sarah records Acme's monthly SLA figures, runs their Weekly and Monthly service reviews, logs CSAT responses from Acme's stakeholders, and tracks a handful of CSI initiatives — including one to automate Sev-1 incident notifications, which she moves from Proposed through to Benefits Realized over the quarter.

Priya Shah CLIENT STAKEHOLDER

Priya, Acme's governance lead, checks the Dashboard weekly and downloads the Executive Report ahead of each Quarterly review. She never edits anything — but she doesn't need to; everything Sarah records is visible to her the moment it's saved.

Ethan Ward CUSTOMER PORTAL USER (E-COMMERCE PLATFORM HOSTING)

Ethan, on Acme's own IT team, checks the portal page a couple of times a week — just the SLAs for the one platform he owns. When the CSAT Due pill turns amber, he flags it to Priya, who follows up with Sarah to make sure the survey goes out on time.

> Notice what didn't happen: Ethan never saw Acme's contract details or SLA targets for other services, Priya never had an edit button to accidentally press, and nobody outside Synapse-Conectiv's Admin and SDM roles ever touched a client account's configuration. That's the access model working as intended.

Workshop discussion questions

- If Acme added a second service tomorrow, what would need to happen before anyone on Acme's team could see it through the Portal?
- Priya spots a metric trending the wrong way. What's her next move — and what could Sarah's have looked like a week earlier to catch it sooner?
- What's the difference between what Priya sees and what Ethan sees, and why does that difference exist?

Training Completion Checklist

Use this page to record sign-off once a track is complete — for a self-paced learner, or for a trainer running a group session.

Administrator Track

Trainee name	Date completed	Signed off by

SDM Track

Trainee name	Date completed	Signed off by

Client Stakeholder Track

Trainee name	Date completed	Signed off by

Customer Portal Track

Trainee name	Date completed	Signed off by

> Completing a track here doesn't change anything in the application itself — Synapse-Conectiv has no built-in training-record feature. This page is a physical or scanned record for your own onboarding files.

Quick Reference

A trimmed-down permission matrix for a fast recap. For the full version, and for everyday feature lookup, see the User Guide and Administrator Guide.

Area	Admin	SDM	Client Stakeholder	Portal
Governance Dashboard	Full	Full	Read-only	—
SLA & Service Quality	Full	Full	Read-only	—
Service Reviews & Actions	Full	Full	Read-only	—
CSAT & NPS Tracker	Full	Full	Read-only	—
CSI Register	Full	Full	Read-only	—
Services & Custom SLAs	Full	Full	Read-only	Own service only
Cyber Security Services (if enabled)	Full	Full	Read-only	—
Executive Reports (PDF)	Full	Full	Read-only	—
Client Accounts — create / delete	Full	—	—	—
Client Accounts — edit (SLA targets, Cyber, CSAT schedule)	Full	Full	—	—
Customer Portal toggle (per service)	Full	Full	—	—
Users & Access	Full	—	—	—
Admin Settings (currency)	Full	—	—	—

Where to go next

Guide	Use it for
User Guide	Everyday feature lookup — Dashboard, SLA, Reviews, CSAT, CSI, Services, Cyber, Reports, Portal.
Administrator Guide	Client Accounts configuration, Users & Access, Portal provisioning, currency, security.