Skills Management 9.0.0

# Training Manager for Genesys WFM Administrator Guide

About Genesys

Genesys powers 25 billion of the world's best customer experiences each year. Our success comes from connecting employee and customer conversations on any channel, every day. Over 10,000 companies in 100+ countries trust our #1 customer experience platform to drive great business outcomes and create lasting relationships. Combining the best of technology and human ingenuity, we build solutions that mirror natural communication and work the way you think. Our industry-leading solutions foster true omnichannel engagement, performing equally well across all channels, on-premise and in the cloud. Experience communication as it should be: fluid, instinctive and profoundly empowering. Go to www.genesys.com for more information.

Each product has its own documentation for online viewing at the Genesys Documentation website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

Notice

Although reasonable effort is made to ensure that the information in this document is complete and accurate at the time of release, Genesys Telecommunications Laboratories, Inc. cannot assume responsibility for any existing errors. Changes and/or corrections to the information contained in this document may be incorporated in future versions.

Your Responsibility for Your System's Security

You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.



Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

Ordering and Licensing Information

Complete information on ordering and licensing Genesys products can be found in the ***Genesys Licensing Guide***.

Released by: Genesys Telecommunications Laboratories, Inc. **http://www.genesys.com/**

**Document Version:** 90_skillsmanagement_training-manager_WFM_administrator_08-2019_v9.0.002.00

# Table of Contents

## Table of Figures

# 1 Preface

Welcome to the Training Manager for Genesys WFM *Administrator Guide.* This guide is designed to explain the application in user friendly terms and walk through how to administer the application from creating Locations, Trainers and Rooms to scheduling training into Genesys WFM.

Due to the integration into Genesys WFM, it is recommended that the Training Manager Administrators already have an understanding of Genesys WFM as this Admin Guide does not cover using Genesys WFM.

Note: for this version, the Skills Portal Users and Skills Assessor menu options have been removed, so please ignore this item in the screen shots.

# 2 About Training Manager for Genesys WFM

Training Manager enables companies to create, manage, and schedule multiple agent training activity, team meetings, and one-to-ones automatically in Genesys WFM. The training scheduling process can include rooms and trainers or any combination of agent, room, and training. For team meetings and one-to-ones, this automatically includes the manager. A browser-based web portal comes as part of the application, allowing visibility of the scheduled training and meeting activity together with any other details available; for example, reason for the training, room, trainer, and any pre-training work if required. The trainer updates attendance through their online attendance register, which they access directly through their web portal. This automatically updates Training Manager with who has attended; if there were any non-attendees they can be "mopped up" automatically as part of the scheduling process.

# 3 Intended Audience

This document is primarily intended for system administrators or other individuals who currently schedule using Genesys WFM.

# 4 Training Manager Administrator

The first time you run Training Manager you will be presented with a configuration screen as shown below. Enter the URL to the IIS virtual directory that contains the Training Manager services in the first field. The remaining fields can be left at their default value (if not using a proxy), or can be modified to suit your environment.

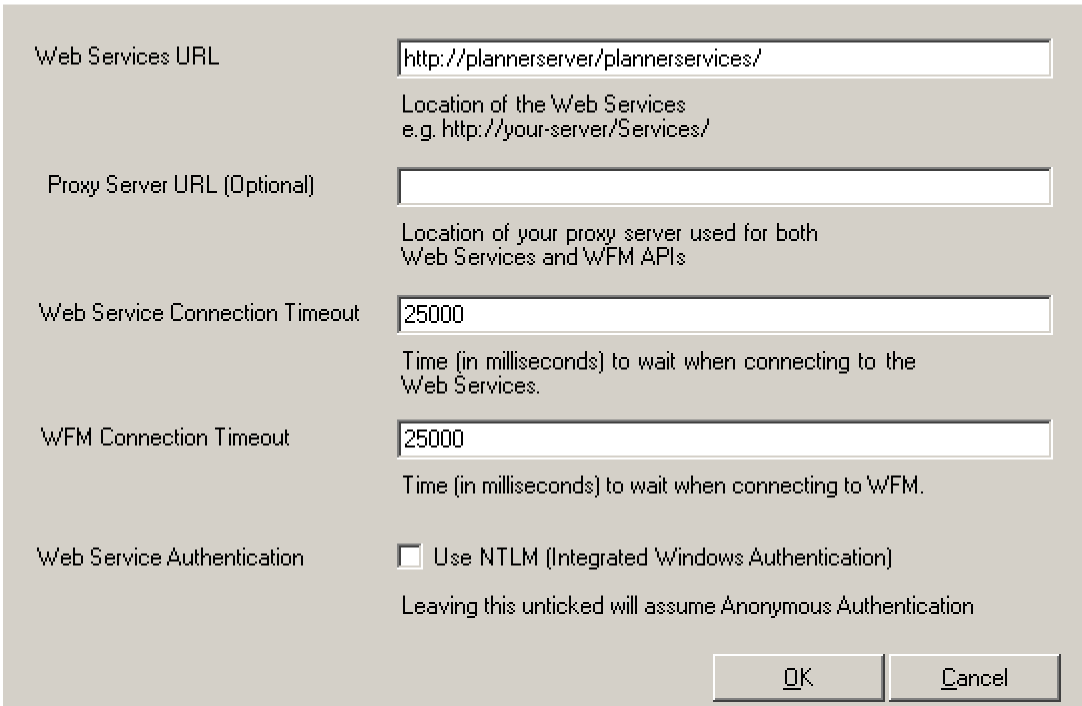



Figure 1: Training Manager Configuration Screen

## 4.1 Logging In

Providing that the user has authority to access the application, the **Login** screen will appear as follows:

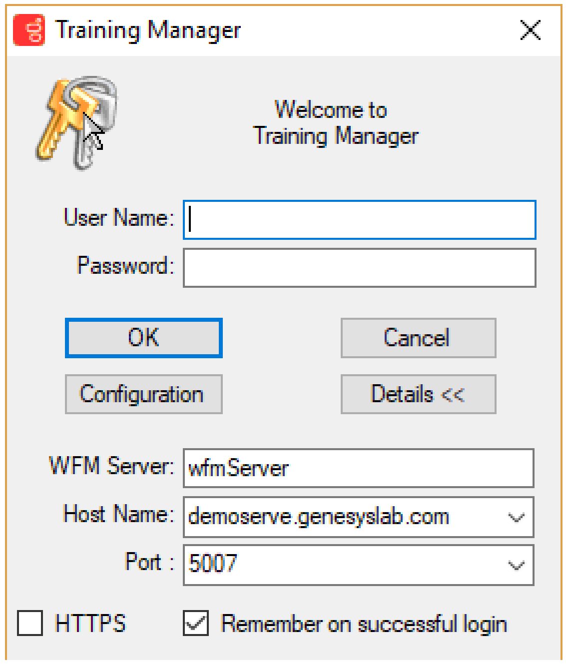



Figure 2: Login screen

Complete the details as required and select **OK**.

## 4.2 Logging Out

To log out of the application, click **File** and then **Exit** or click on the red X in the top right hand corner.

The Training Manager main menu will be displayed as in the example below.


Figure 3: Logging out

# 5 Training Manager Components Overview

Training Manager has several key components with a further component available for integration into the Performance DNA module:

1. **Training Requests** – select this menu option to create a training request.
    - Completion Status / Reports
2. **Meetings** – select this menu option to create and schedule any meetings or one-to-ones where the team manager is also required.
3. **Resources**
    - **Room Calendar** – all room activity will be visible here, from creating an individual manual room booking, to rooms booked as part of the optimized (or manual) scheduling process.
    - **Trainer Calendar** – as with room booking, all trainer activity will be visible here, from manual holidays and scheduled meetings, to training activity booked as part of the optimized (or manual) scheduling process. Trainers now have the ability to keep their calendar up-to-date directly through their web portal access.
    - **Manager Calendar** – the **Manager Calendar** has to be kept up-to-date with working hours and unavailable time for Training Manager to schedule team meetings. Managers keep their working hours and unavailability up-to-date-through their web portal access.
4. **Training Manager Portal Users** – select this menu option to manage access to the web portal. Administrators are created here. Trainer managers, trainers, managers and agents are created automatically; however, trainer managers, trainers, and managers must be granted access to the web portal. Agents are granted access to their portal through the agent option ‘Grant access to all from WFM…’
5. **Configuration** -
    - **Training Categories** – the different categories used in training activity for example, **Trainer Led**.

- **Meeting Types** - the different types of meetings associated with the specific meeting algorithm, for example, **One-to-One**, **Team Meeting**.
- **Booking Categories** – distinguish the type of category in the web portal, for example, **Holidays**. They are also color coded for easy visibility.
- **Selection & Exclusion** – record excluded users and / or excluded 'special dates' together with the reason e.g. long-term absence.
- **Resources** – locations, trainers, rooms and managers are created, configured, and managed here.

6. **Training Manager Portal** – select this menu option to manage authentication, branding, and visibility of training schedules in the web portal.

These components are covered in detail in the document.

# 6 Configuring Training Manager

Due to the integration into WFM, the following information will already be available to select through Training Manager:

- Management Units.
- Agent Groups, Skills (including proficiency levels), and Activities.
- Agent WFM schedules.

## 6.1 Time Zone

When first accessing Training, Manager check that the correct time zone has been selected as this will affect the scheduling activity.

Click on **Time Zone** in the bottom right hand corner and a separate window will be presented to use the drop-down box to select your working time zone. This only needs to be done in the first instance or if your working time zone changes.

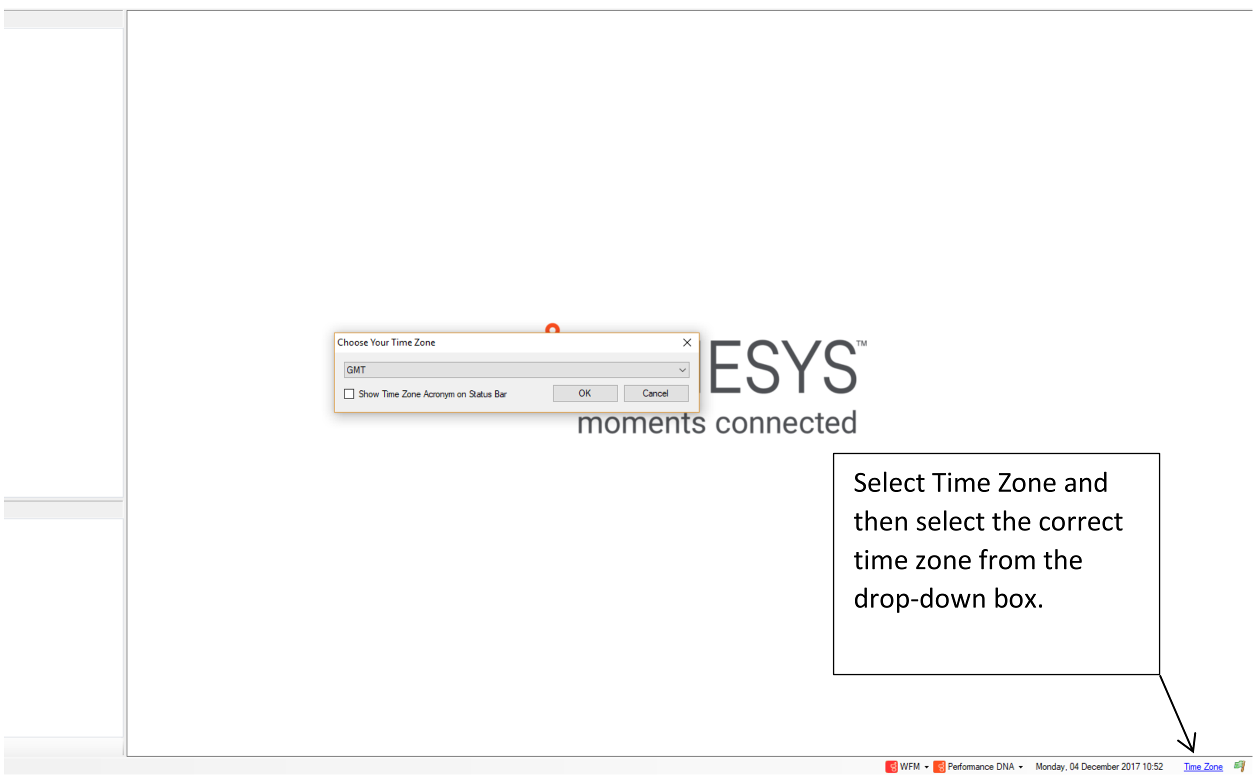



Figure 4: Setting your time zone

## 6.2 Locations

### 6.2.1 Creating Locations

Training Manager must be configured to identify the location that agents, trainers, managers and rooms are associated to. Training Manager needs this information to schedule training activity. The locations therefore must first be created in Training Manager.

To create a new location, expand **Configuration**, from the list under **Main Menu**. Expand **Resources** and then click on **Rooms & Locations**.

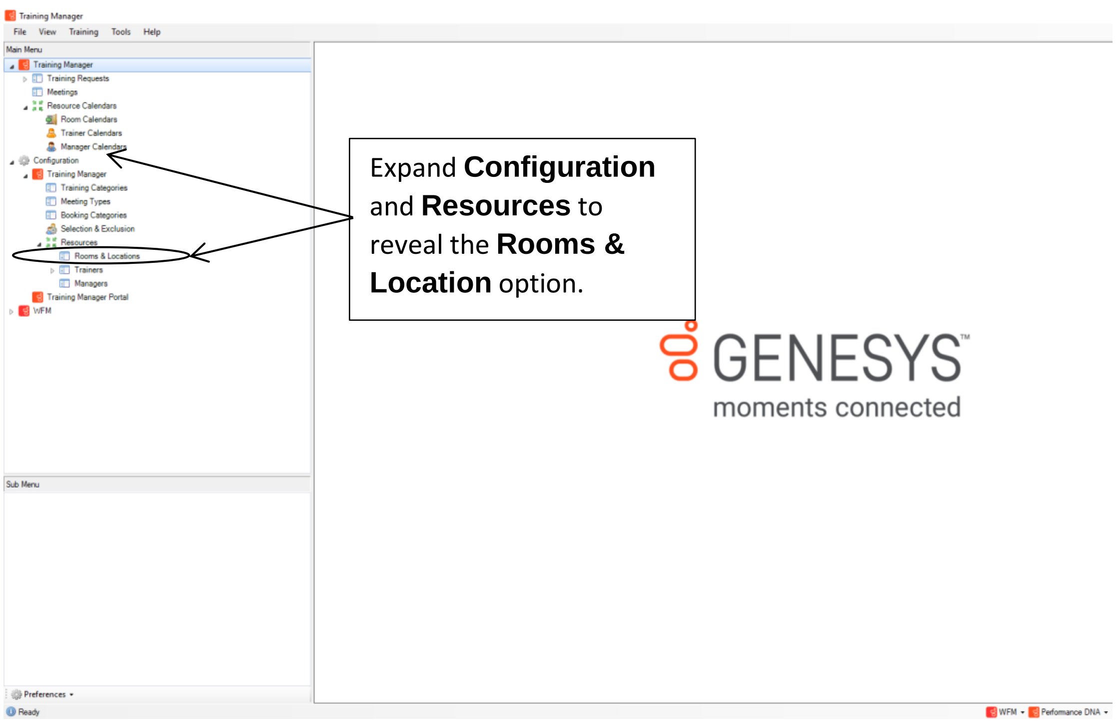



Figure 5: Managing locations

Expanding the **Internal** Sub Menu, displays a list of the internal sites. Expand the site to reveal any associated rooms.

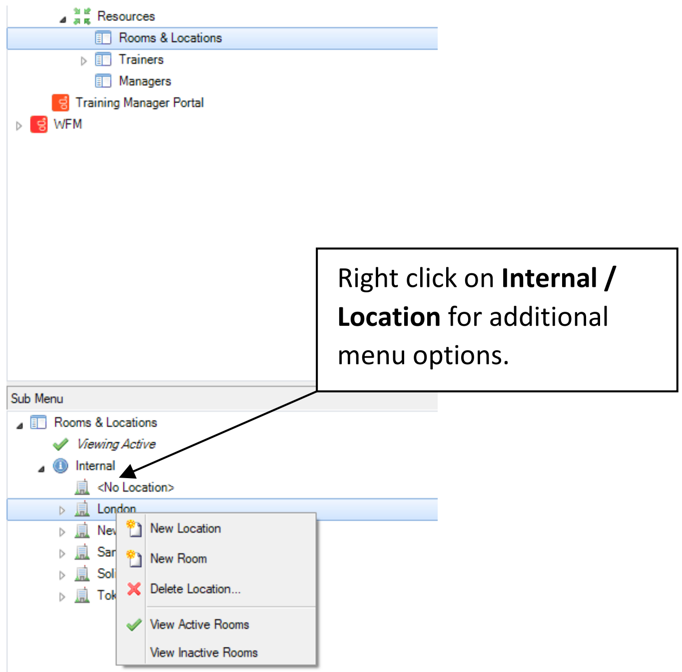



**Figure 6: Viewing additional options within the Internal sub menu**

To create a new location, right-click **Internal** in the **Sub Menu**; additional options will appear.

Select **New Location**, and complete the details as required. If the location is a satellite site, select it from the **Parent Location** drop-down menu. Once the location has been created, rooms, trainers, managers and agent teams can be associated to it.

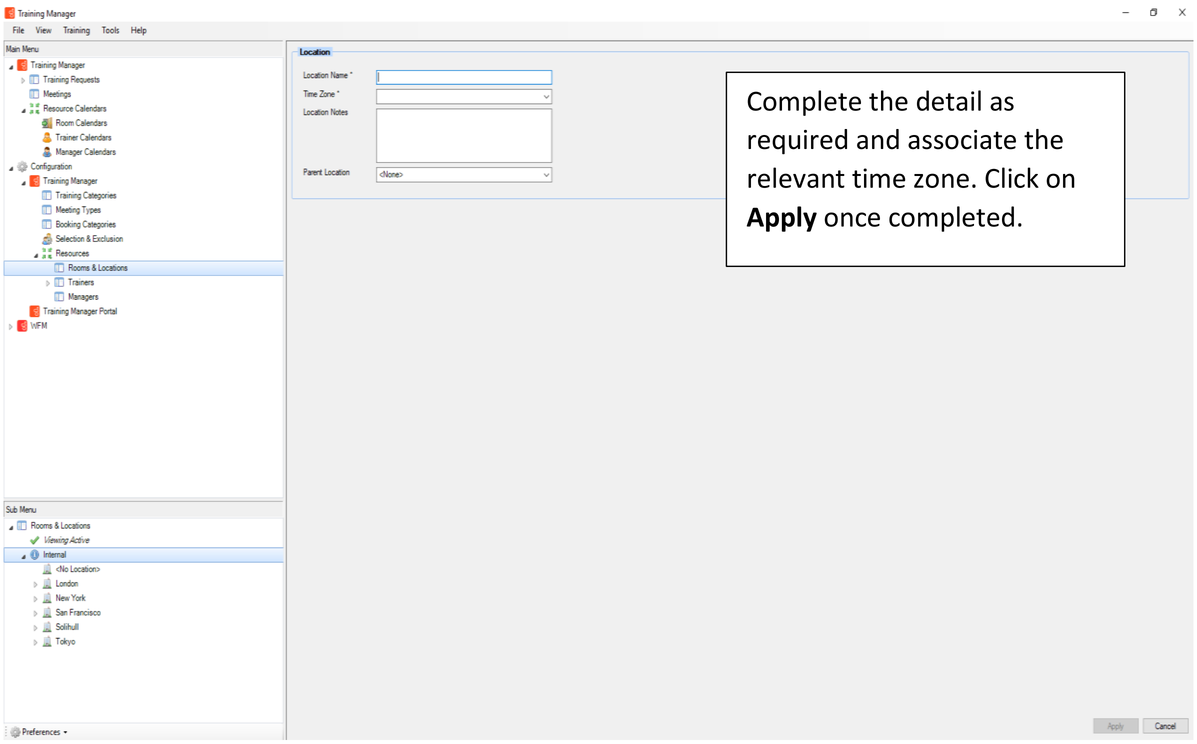



Figure 7: Creating a new location

### 6.2.2 Deleting Locations

To delete a location, select it from the **Rooms** Sub Menu, and then right-click the location and select **Delete Location**.

Note: A location can only be deleted if there are no activities associated with it.

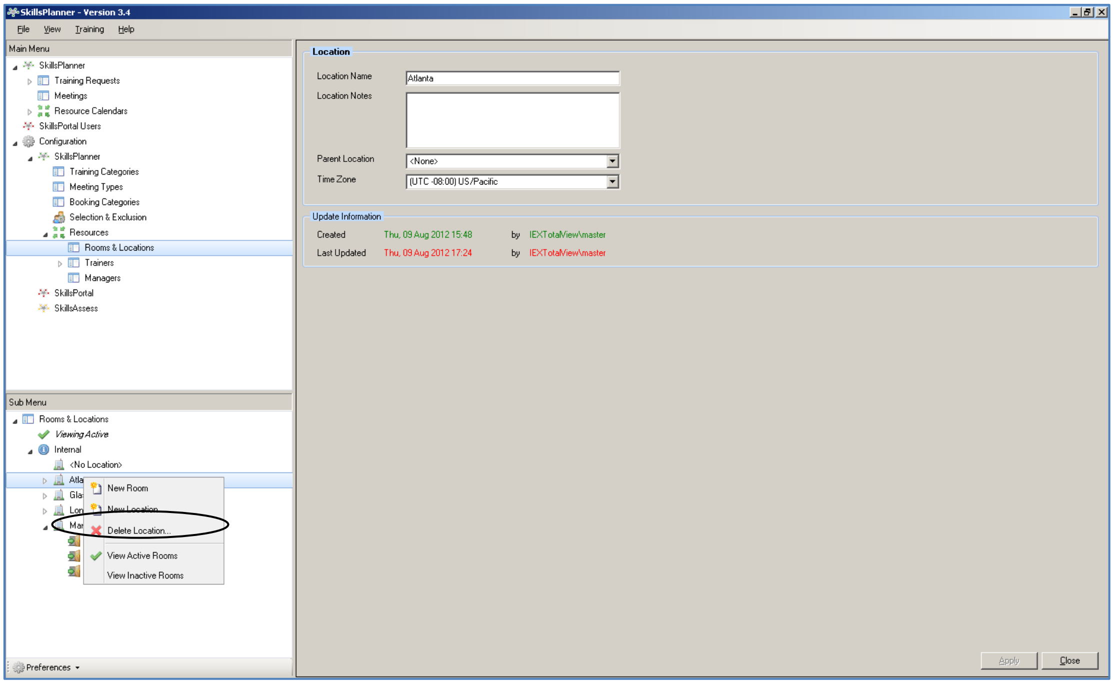



Figure 8: Deleting locations

## 6.3 Rooms

### 6.3.1 Creating Rooms

Rooms are created using the **Resources** option, similar to creating locations.

Select **New Room** from the **Rooms** Sub Menu; this will associate the new room with the location.

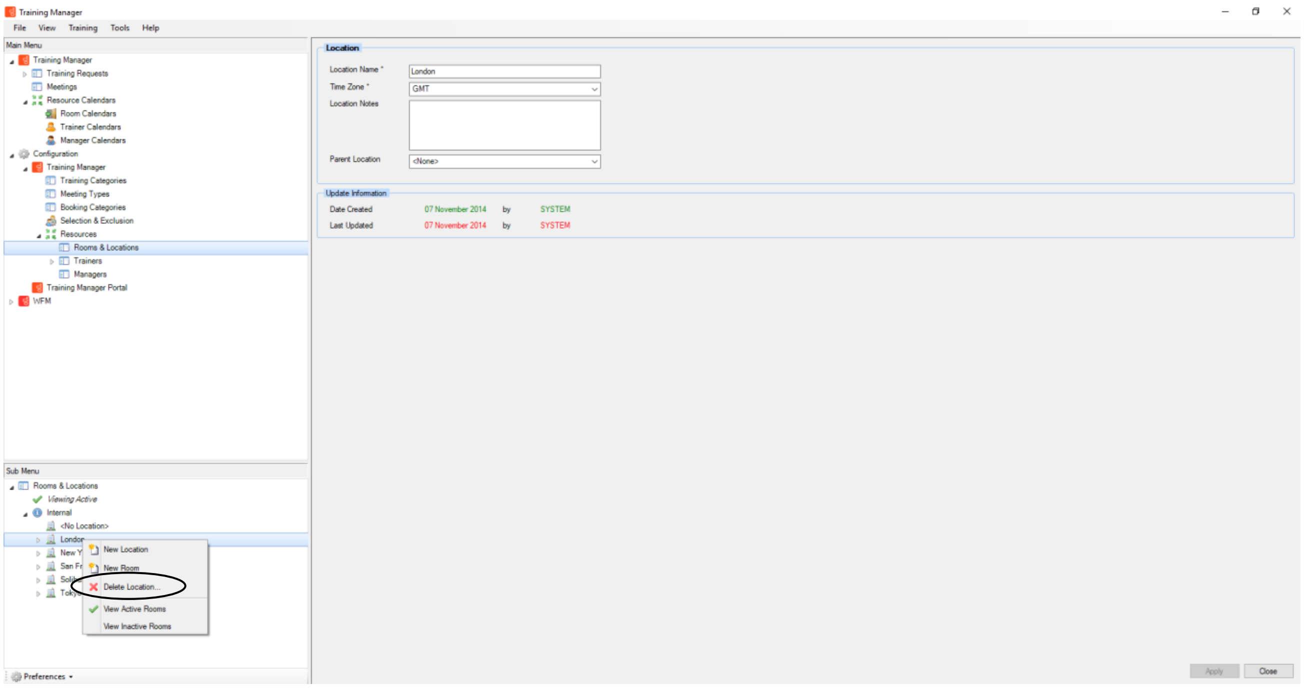


Figure 9: Creating rooms

After selecting **New Room**, the **Room** screen appears on the right-hand side of the window.

Enter a relevant room name (including the location as part of the room name identifies where the training will take place) and any other necessary details.

Select the location of the room from the **Location** drop-down menu (the location name will be populated automatically if the room is created against the location).

Enter the room constraints. For example, the minimum and maximum number that the room can accommodate for training. Leave the minimum capacity of the room as 0 and manage the training group size as part of the scheduling process.

If the room becomes unavailable for scheduling then uncheck the **Active** box. The room will not appear as available when selecting rooms in which to schedule training.

Once the room has been configured it will appear against the location in the tree view.

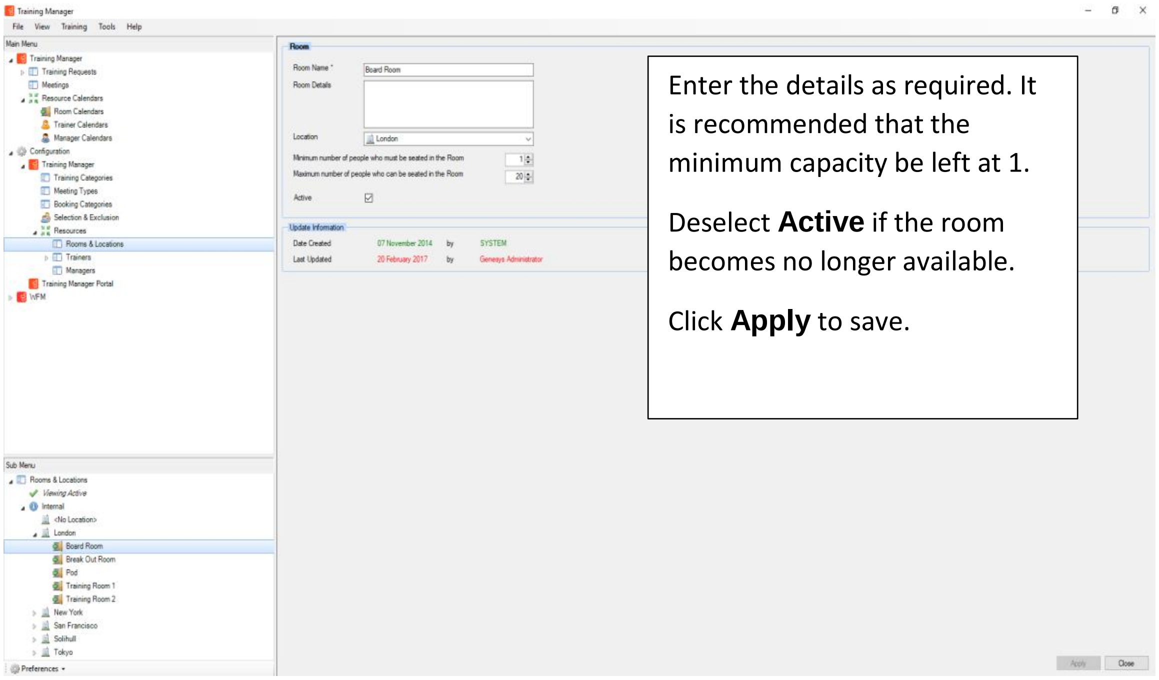



Figure 10: Setting room options

### 6.3.2 Deleting Rooms

To delete a room, expand the location and select the room that you want to delete. Right-click the room and select **Delete Room** as in the example below.

The room will only be deleted if there has been no activity associated with it.

There is, however, the option to make the room inactive, which removes it from the list of available rooms. Uncheck the Active box; the room is now inactive.

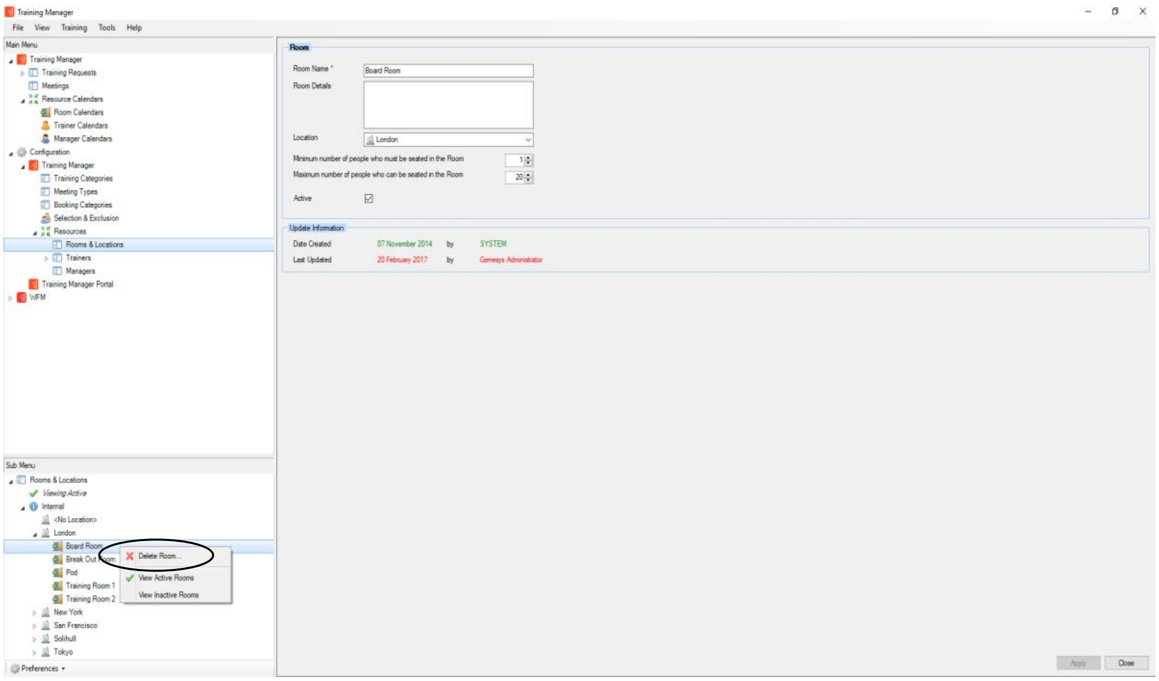



Figure 11: Deleting rooms

## 6.4 Trainers

### 6.4.1 Trainers

Trainers are managed in Performance DNA. Preferably using OrgData.

Select **Configuration**, then select **Training Manager**, and then select **Resources**. Select **Trainers**; the tree view will appear in the **Sub Menu** below.

Expand the tree view to view any configured internal trainers.

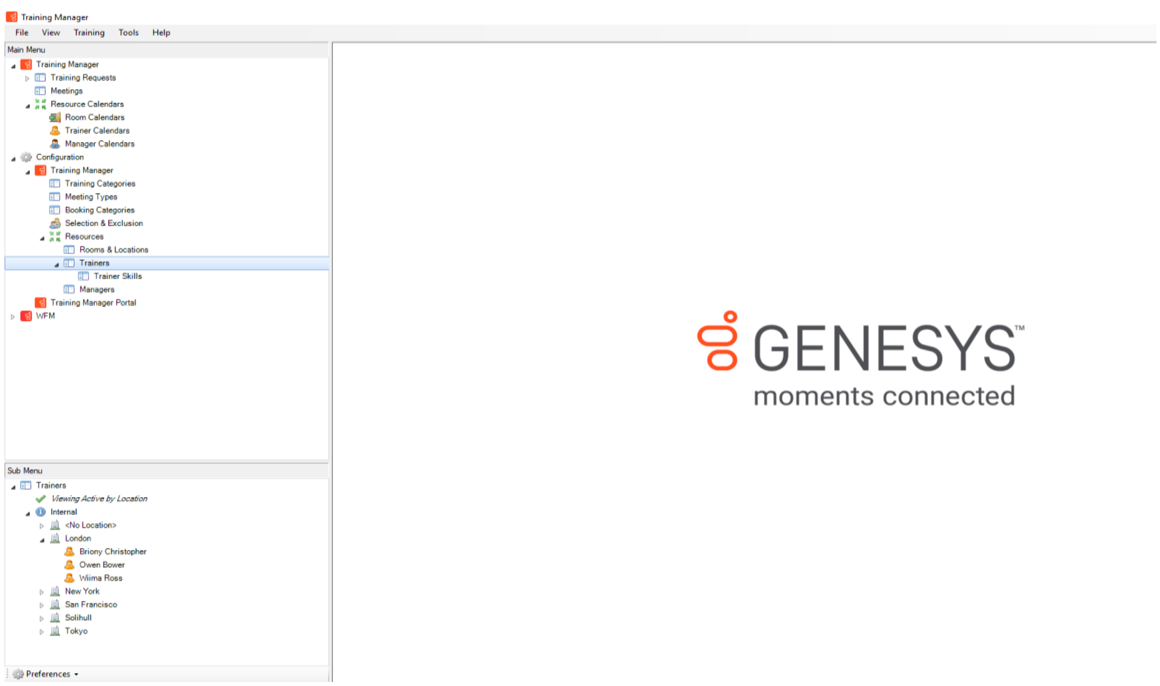



Figure 12: Creating trainers

There are three ways to view the trainer structure; the Sub Menu hints will indicate which view is displayed. Right-click **Internal** in the **Sub Menu;** the following options will be available:

1. **View by Location** - this lists all of the locations in the Sub Menu; expanding the location reveals the associated trainers.

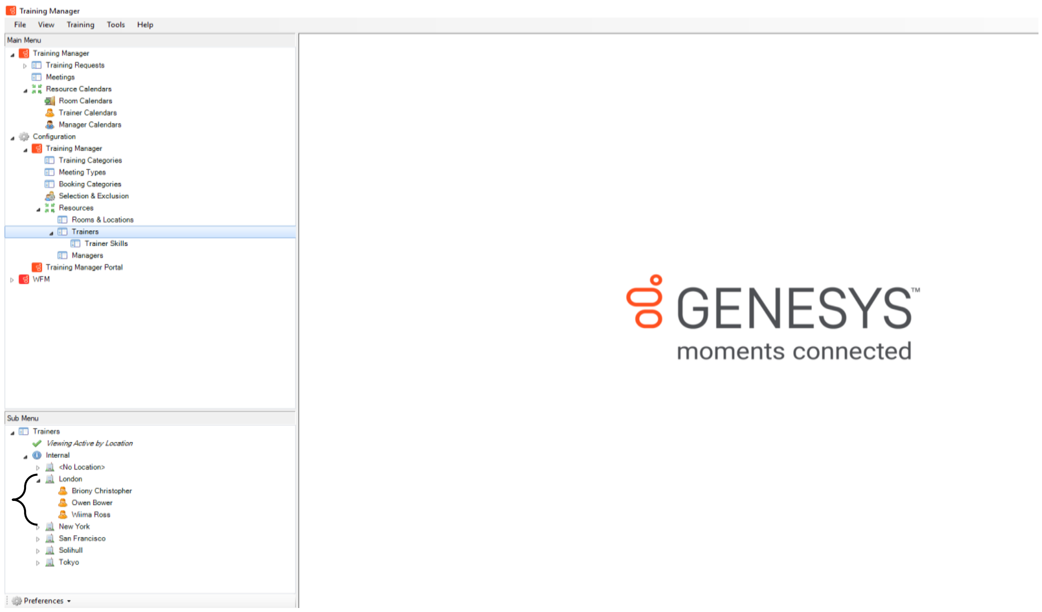



Figure 13: View trainers by location

2. **View by Hierarchy** –this lists the trainer manager and any associated trainers (creating the Trainers hierarchy will be covered later in the document).


Figure 14: View trainers by hierarchy

3. **View by Alphabetical Order** – lists all of the trainers in alphabetical order.

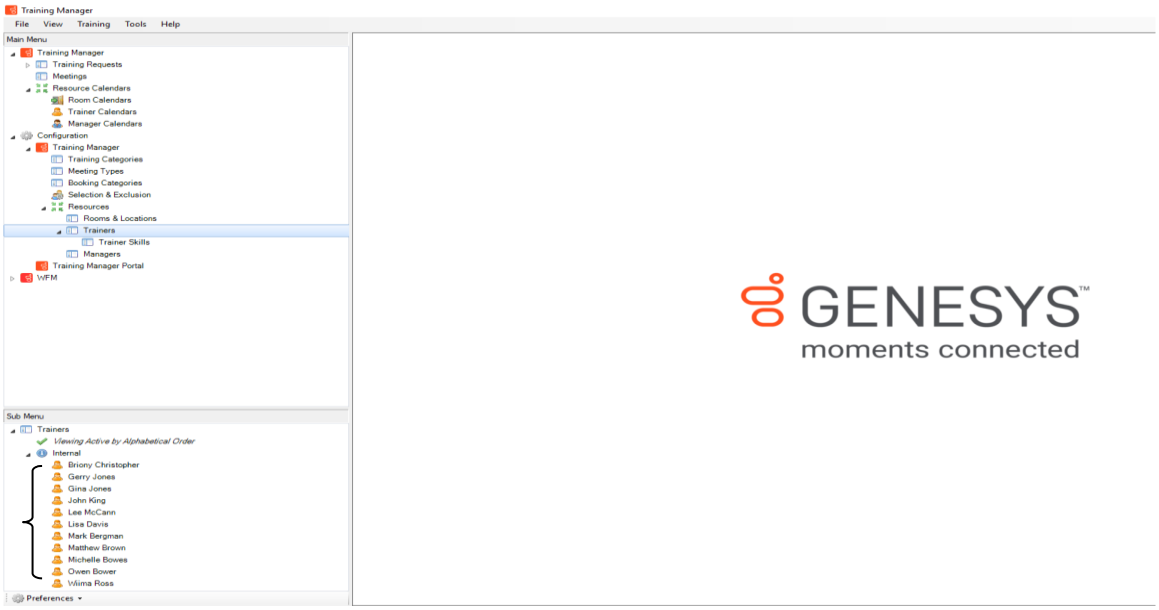



Figure 15: View trainers by alphabetical order

A new external trainer can be created by right-clicking a trainer category apart from Internal.

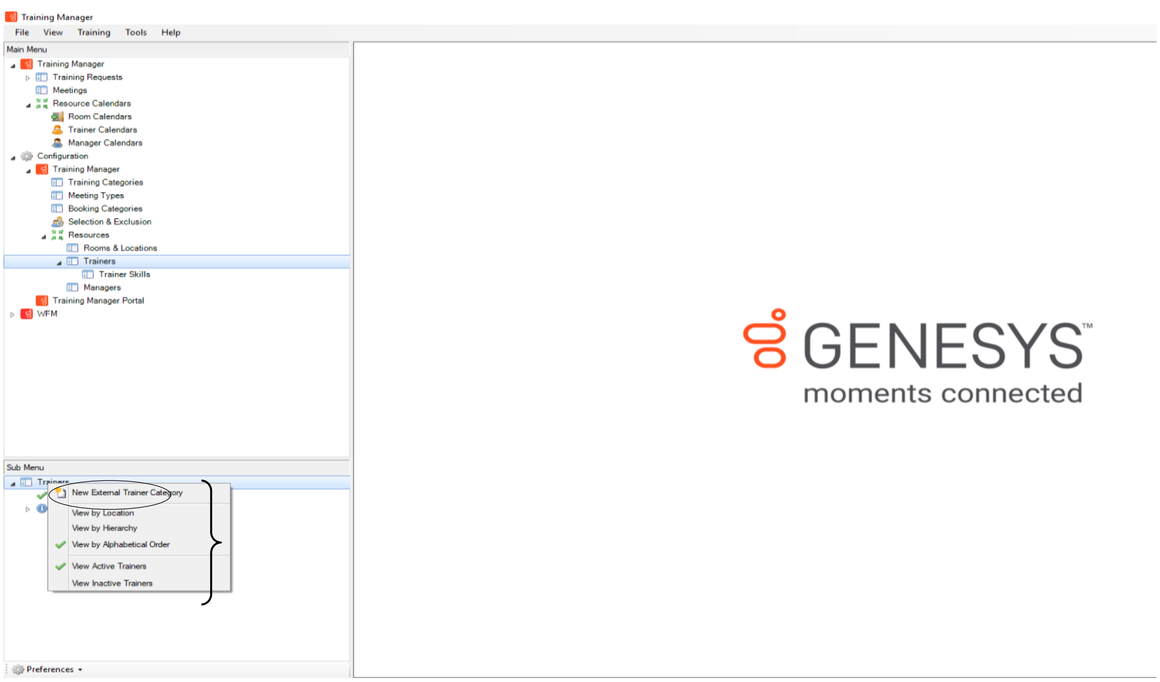



Figure 16: Creating a new trainer

Select **New Trainer** (only for external Trainers); the **Trainer** screen will appear on the right-hand side of the window.

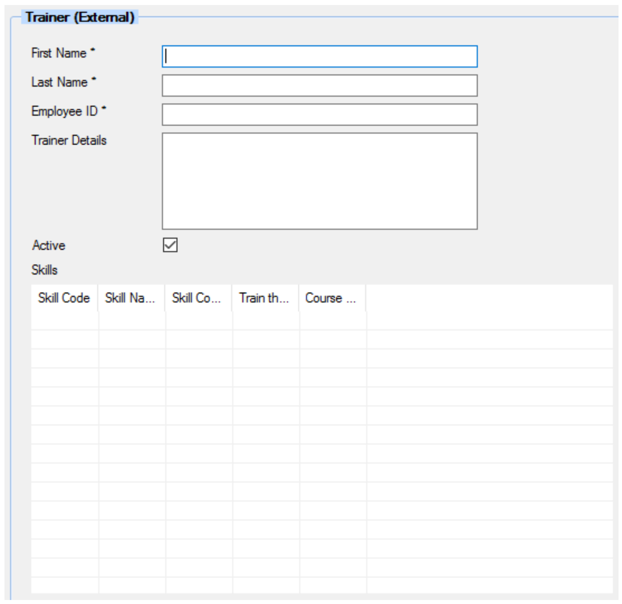



Figure 17: Creating a new trainer

Enter the details as required. If the trainer is external, an external reference can be included.

The option to mark the trainer as inactive is also available.

Information entered in **Working Hours** and **Locations** identifies when and where the trainer is available.

The **Skills** tab is used to associate specific skills with individual trainers.

### 6.4.2 Working Hours

This has to be updated in Training Manager, the top part of the screen is not editable because Trainers are maintained in Performance DNA.

Training Manager needs the following information for the application to understand what hours the trainer can work.

**Working Hours**:

**Start** –the earliest time that the trainer can start work.

**End** –the latest time the trainer can finish work.

**Lunch**– the earliest and latest times for lunch.

**Earliest** – the earliest time the trainer can have their lunch.

**Latest** – the latest time the trainer can finish their lunch.

This information allows the application to understand when the trainer can be scheduled and how flexible they are with their working hours.

**Note**: Training Manager supports the ability to select trainers for scheduling when their start time is midnight. Setting both Start and End working hour times to “00:00” indicates a non-working day so ensure that the End time is not set to “00:00” if you want the shift to start at midnight.

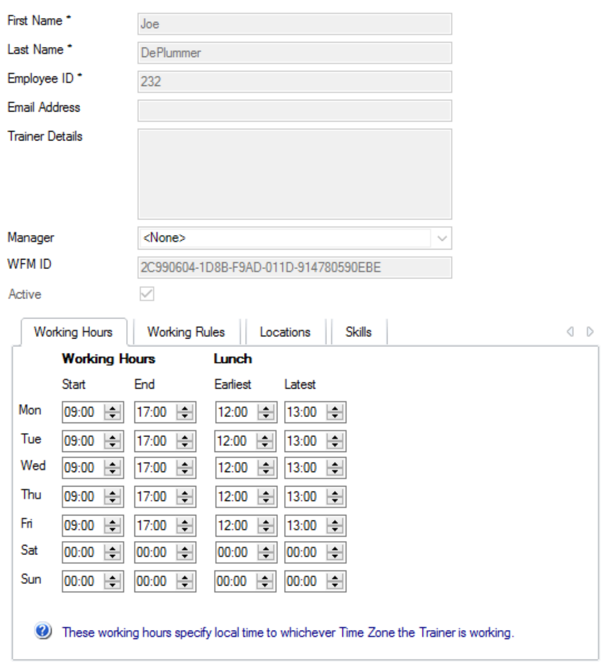



Figure 18: Creating a new trainer: working hours

### 6.4.3 Working Rules

**Maximum Hours Per Day** –the maximum number of hours the trainer can work per day.

**Maximum Hours Per Week** –the maximum number of hours the trainer can work per week. This field is not restricted to whole hours.

**Trainer Week Starts On** –enables Training Manager to calculate the trainer's working hours against their maximum hours per week.

**Minimum Hours Between Working Days** –the mandatory minimum rest time between shifts.

**Minimum Required Lunch Break in the Working Day** – the time entered here will ensure that the trainer receives this minimum amount of time for their lunch break.

**Total Minutes for all Breaks in the Working Day** - the time entered here will ensure that the trainer receives this minimum amount of time for their total lunch breaks.

This information allows the application to understand when the trainer can be scheduled and how flexible they are with their working hours.

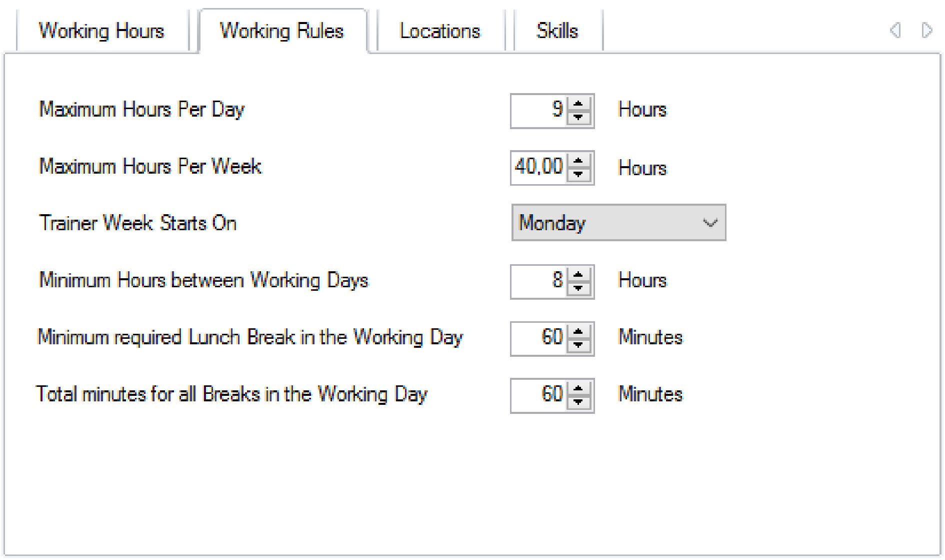



Figure 19: Creating a new trainer: working rules

### 6.4.4 Trainer Locations

The information on this tab must be completed as part of configuring a new trainer.

It identifies the location(s) where the trainer can deliver training. More than one location can be selected.

When the **Location** tab is selected, a list of locations in the application appears. Select the relevant location and check the box to the left of the location name. Do the same for each location where the trainer can deliver training. The trainer's home location must be clearly identified, as Training Manager will always prioritize training to trainers at their home location.

To set a location as a home location, click the icon to the left of the location name and then right-click it to view the **Add Home Location** option. Select **Add Home Location**.

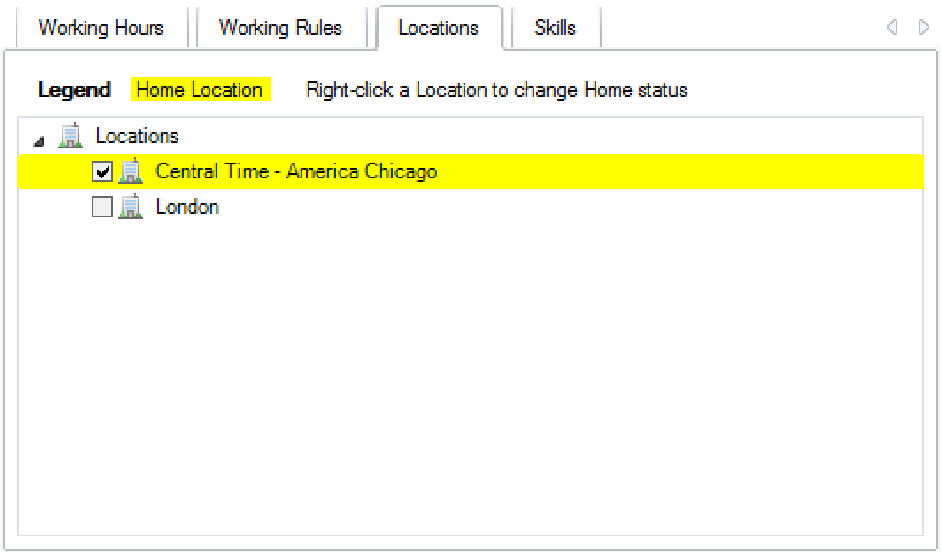



Figure 20: Creating a new trainer: locations

Once **Add Home Location** has been selected, the location will have a yellow box around it.

The option to remove the current home location is available by right-clicking the location and selecting **Remove as Home Location**.

You now have the option to select a different home location for the trainer.

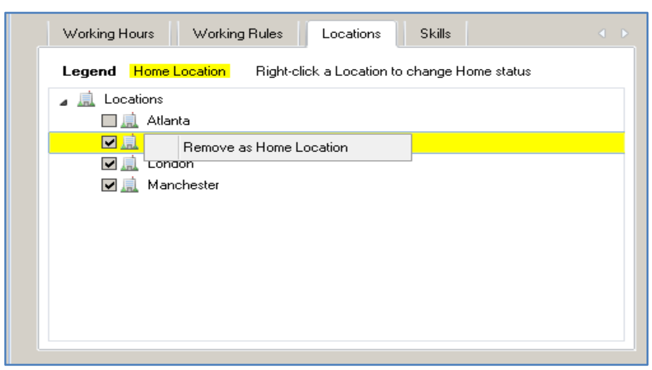



Figure 21: Creating a new trainer: removing a home location

### 6.4.5 Deleting Trainers

The option to delete a trainer is only available for external trainers. Internal trainers are managed through Performance DNA.

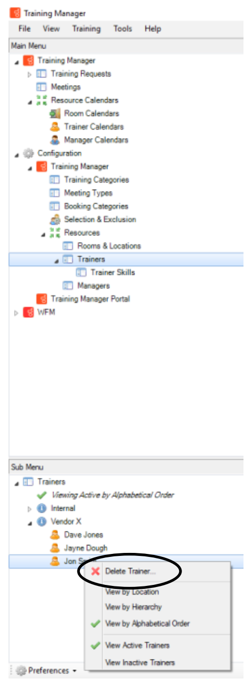



Figure 22: Deleting trainers

## 6.5 Trainer Skills

Training Manager includes features for managing trainer skill information. Associating skills and skill levels with trainers allows training schedulers to identify the best trainer for training requests based on their skill data.

### 6.5.1 Managing skill information

To create new skills, browse to the Configuration –> Skills Training Manager –> Resources –> Trainers –> Trainer Skills option from the Main Menu. Right click on the **Trainer Skills** option from the **Sub Menu** and select **New Trainer Skill**. The **Trainer Skill** screen will appear.

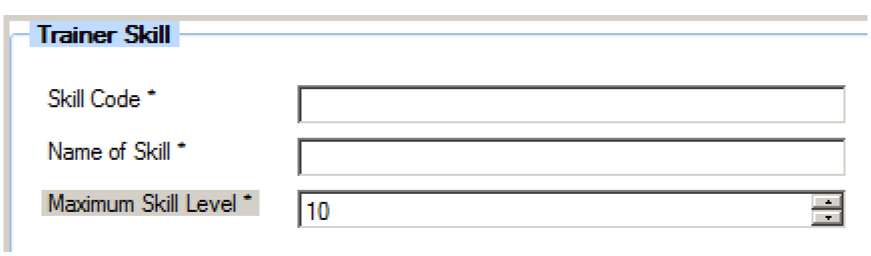


Figure 23: Creating new skills

To create a new skill, enter a Skill Code, Name of Skill and Maximum Skill Level then click the Apply button.

### 6.5.2 Associating skills with trainers

To assign skills to a trainer browse to the Configuration –> Skills Training Manager –> Resources –> Trainers section and select a trainer from the Sub Menu. The Trainer screen will appear. Select the **Skills** tab at the bottom of the screen.

The Skills tab shows a table containing the selected trainer's skills. The table includes information about skills (**Skill Code** and **Skill Name** columns), **Skill Competency**, **Train the Trainer Date** and **Course with Skill Last Trained**. The **Skill Competency** column shows the trainer's current skill value for each skill. The **Train the Trainer Date** should be used to indicate the date on which the Trainer was taught the skill (this field is optional). The **Course with Skill Last Trained** field will be automatically populated by Training Manager based on the most recent Training Session that the trainer taught and that required the listed skill.

To add a skill to a trainer right click on the table and select the **Add Skill** option. Note that this option requires that you have at least one skill present in the Skills section and that the selected trainer doesn't already have all skills assigned to them.

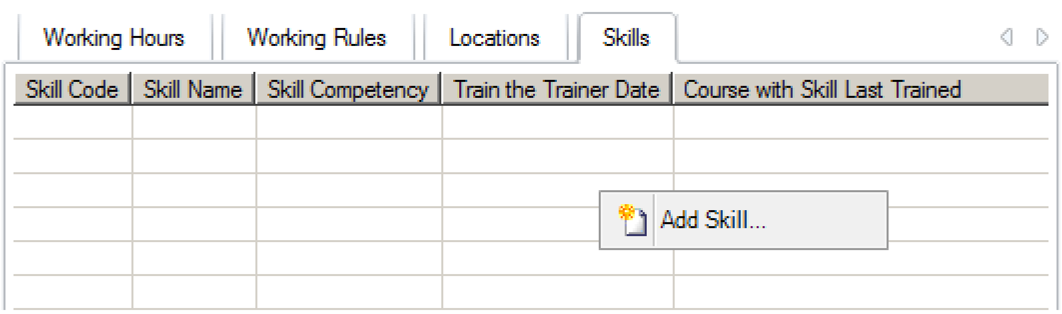



Figure 24: Adding skills to trainers

The **Choose Trainer Skill** dialogue will appear. Select a skill from the dropdown list, set a **Skill Competency** for the trainer and (optionally) set the **Train the Trainer Date**. Once you click **OK** the skill will be added to the selected trainer.

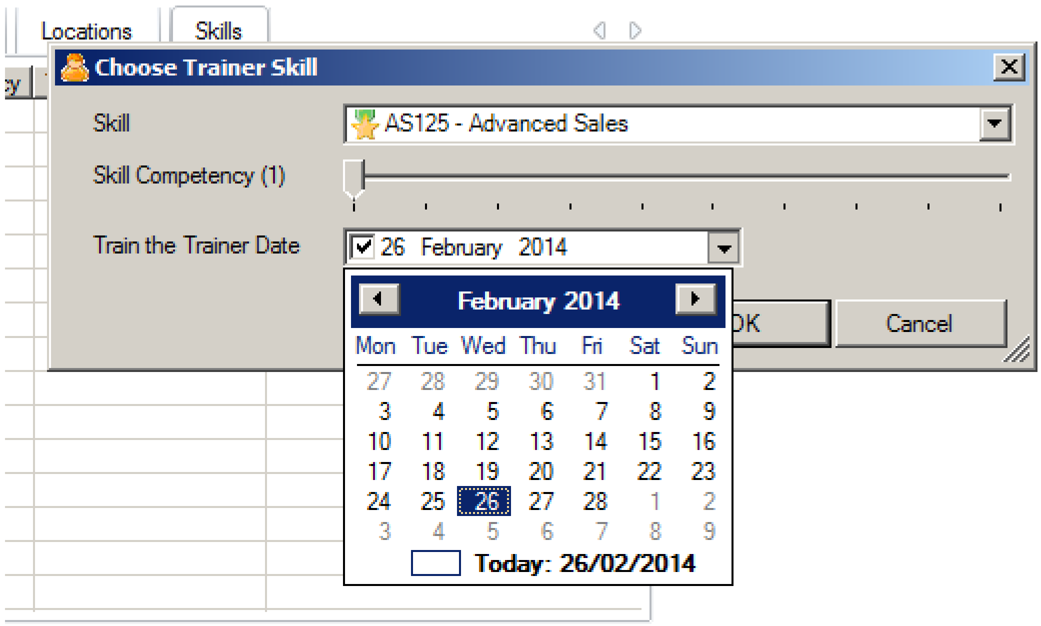



Figure 25: Resources view after setting required skills

Once you have created some skills and assigned them to trainers it will be possible to find the most suitable trainers for a training event based on required skills.

To do this create a training request and complete the start, user selection and training events tabs. Next click the **Schedule Event** button. The **Schedule Event** screen will appear. The skills required for the event should be specified in the **Skills** tab.

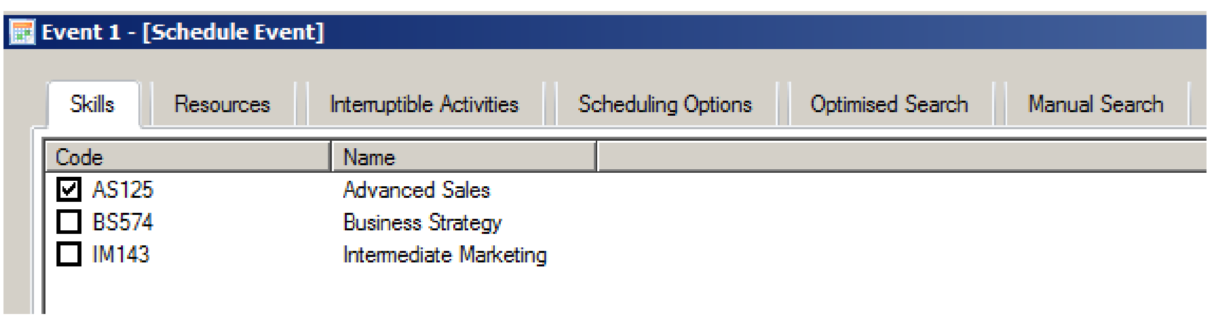



Figure 26: Setting required skills for a training event

Once you have selected the required skill/skills click on the **Resources** tab. The left side of the screen shows Resources, including locations, rooms and trainers. The right side of the screen lists trainers, trainer skills and their values. This section is divided into sub-sections per skill. All trainers that hold the skill will be included in the relevant skill section and their records will be sorted based on highest skill competency first.

This section will show all skills regardless of whether they were selected in the Skills tab, however, skills that were selected will appear highlighted. For example, the following screenshot shows the **Resources** tab after selecting only the “Advanced Sales” skill from the **Skills** tab.

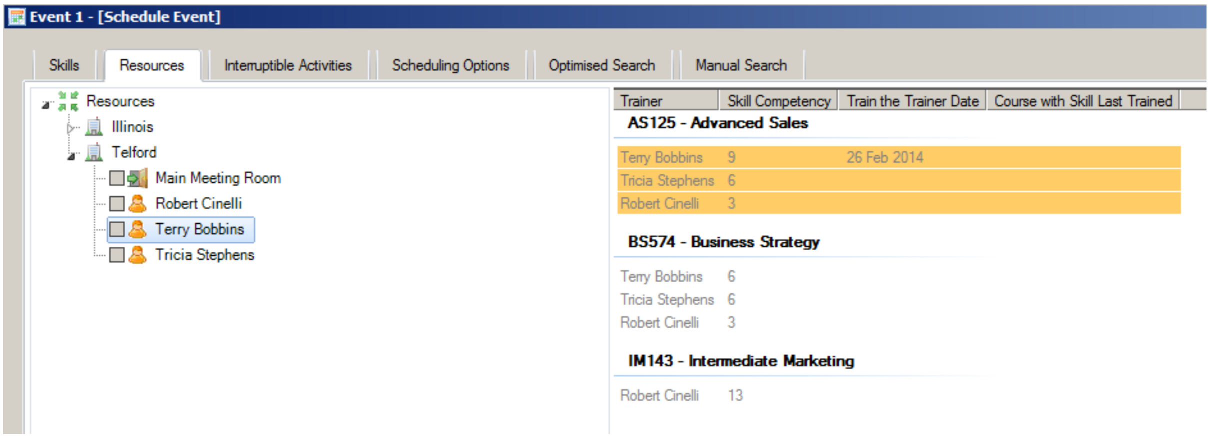



Figure 27: Resources view after setting required skills

Trainers that are not selected in the Resources hierarchy will be listed on the right with their details shown in grey. Checking trainers on the left side of the screen will result in their skill records being shown in black and rising to the top of the list relative to other checked trainers’ records based on skill competency.

It is possible to go back to the Skills tab and change the skill selection before returning to the Resources tab to review the trainer selection based on the newly selected skills.

Once you have selected some trainers for the event, continue to select **Interruptible Activities**, **Scheduling Options** and search for sessions using either **Optimised Search** or **Manual Search**.

When a trainer teaches a course with a skill that was required by the course, e.g. the skill was checked in the **Event - Skills** tab, Training Manager will automatically update the trainer’s **Course with Skill Last Trained** value for that skill with the details of the event (event name and date). Consequently, the value of the **Course with Skill Last Trained** field will be empty if the trainer has never taught a training event that required the skill or the most recent event (and date) that the trainer taught that required the skill.

**Feature Notes:**

- The Trainer Skills feature supports schedulers in selecting trainers for training requests. Once trainers are selected for a training request the skills and skill values have no impact upon the optimised search algorithms that produce training sessions.
- Deleting skills will result in the skills being disassociated from trainers and their related details, e.g. skill competency, Course with Skill Last Trained and Train the Trainer Dates, will be lost.

## 6.6 Managers

Managers must exist in Training Manager to be able to schedule them for team meetings and one to one sessions.

Managers are maintained in Performance DNA. Preferably using OrgData.

Select **Resources**, and then select **Managers**. Right click on **Managers** in the sub menu to view the different viewing options available.

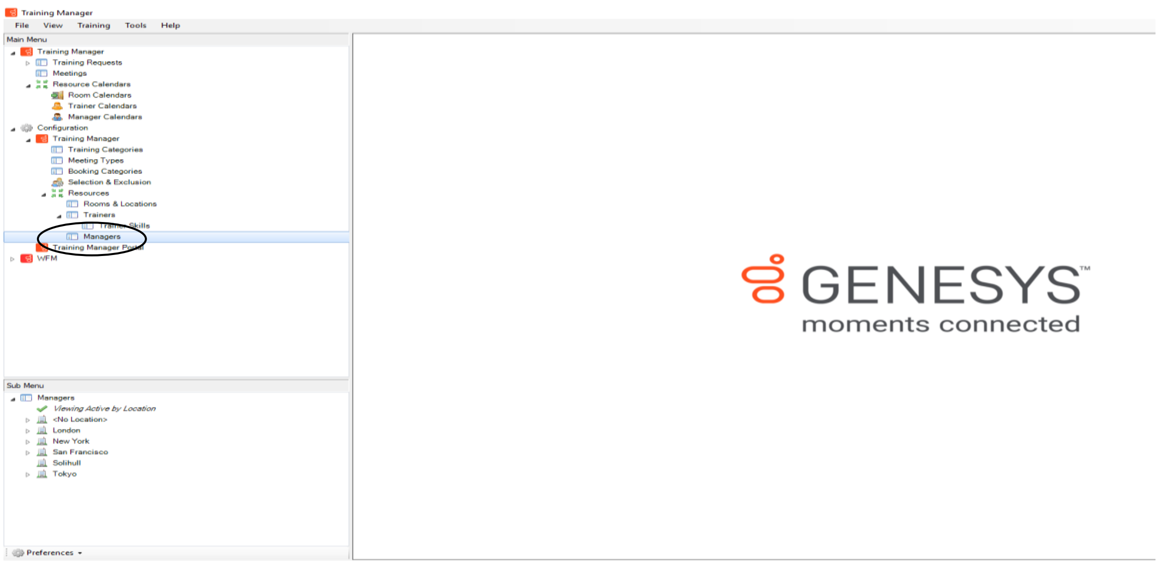



Figure 28: Creating new managers

If **View by Alphabetical Order** is selected, a list of existing managers is available in the **Sub Menu**. If **View by Location** is selected, a list of locations is available.

Sub Menu hints will identify which option has been selected.

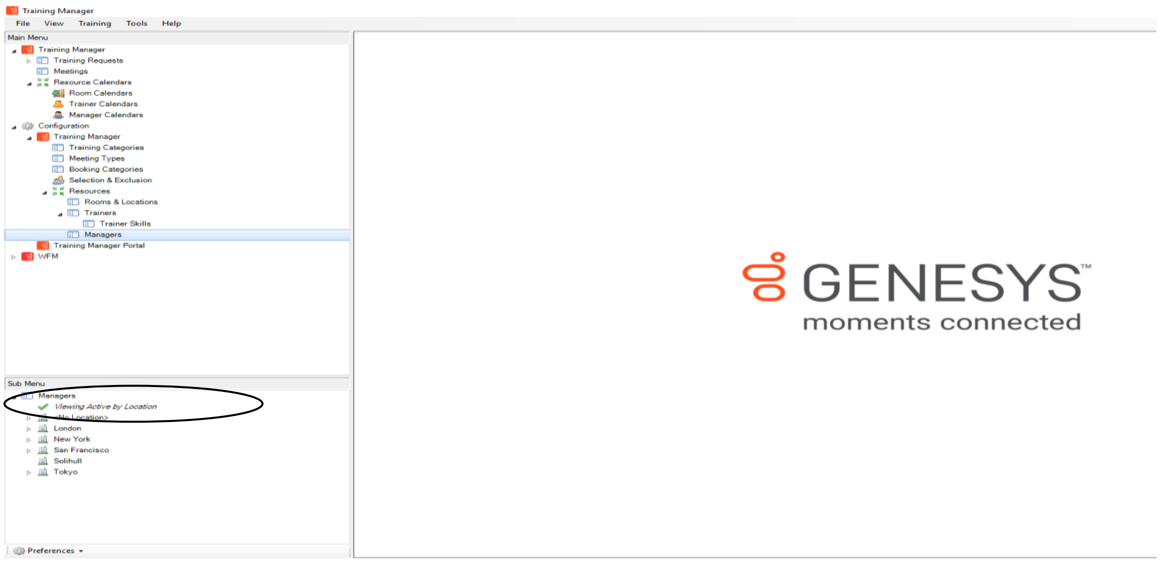



Figure 29: Creating new managers

Below is an example of the **View by Location** option.

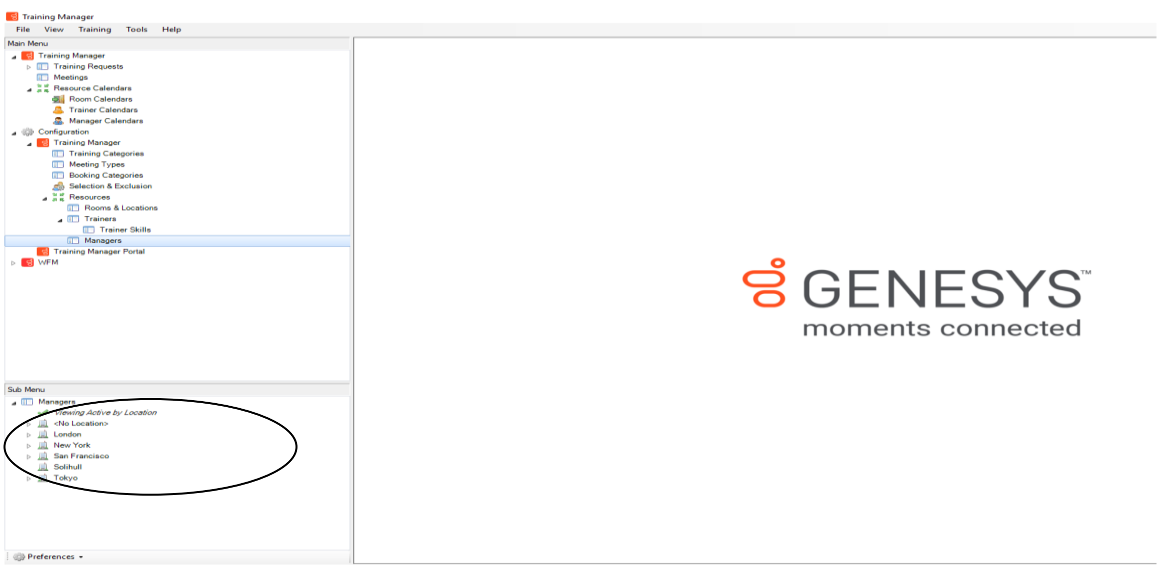



Figure 30: Viewing managers by location

The **Manager** screen appears, with options to configure information for the new manager. Configure the manager's default working hours in the **Working Hours** Tab. Managers are maintained in Performance DNA so the top section is not editable.

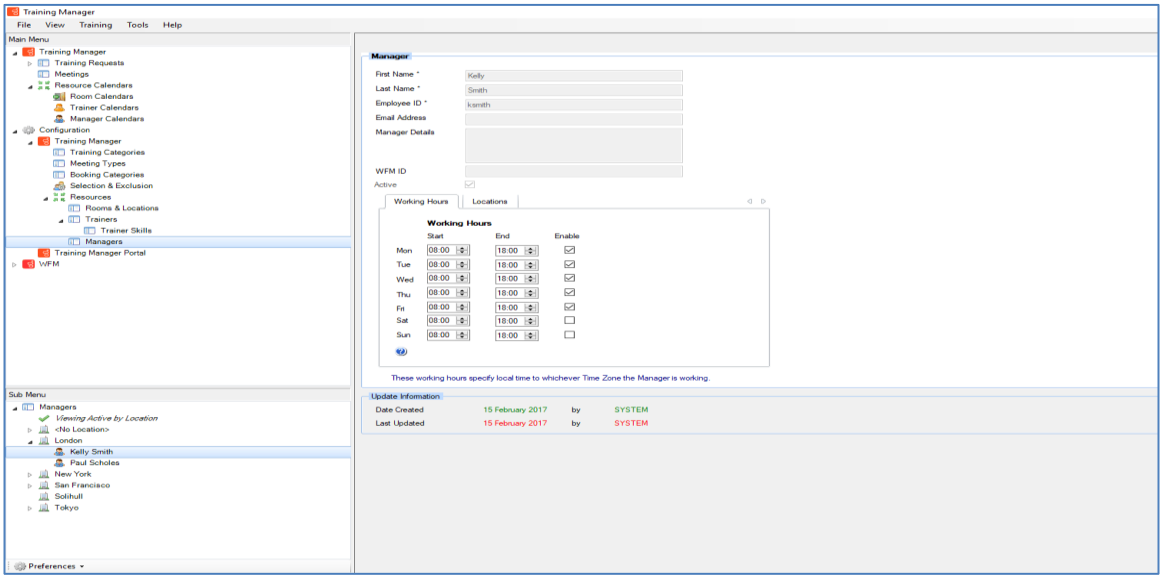



Figure 31: Configuring a new manager's working hours

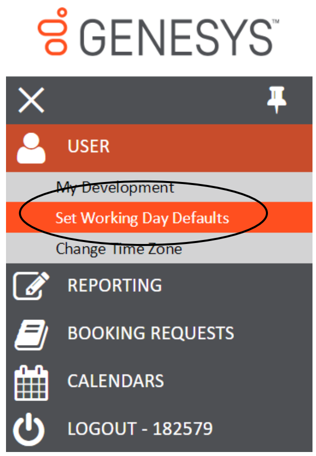



Figure 32: The training portal

Once the default working hours have been set in Training Manager, they can be changed in the manager's training portal.

The example below displays a manager's training portal home page with the following two options available under **your working hours**.

- **set your regular working hours**
- **set exceptions to your regular hours**

### 6.6.1 Setting Manager Regular Working Hours

After selecting an option, the **Set Working Day Defaults** window appears, enabling the manager to change their default working hours. The working hours must be defined, as Training Manager needs to know the manager's working hours.

Amend the hours as required, un-checking any days that are not working days. This automatically updates the manager's default working hours in Training Manager.

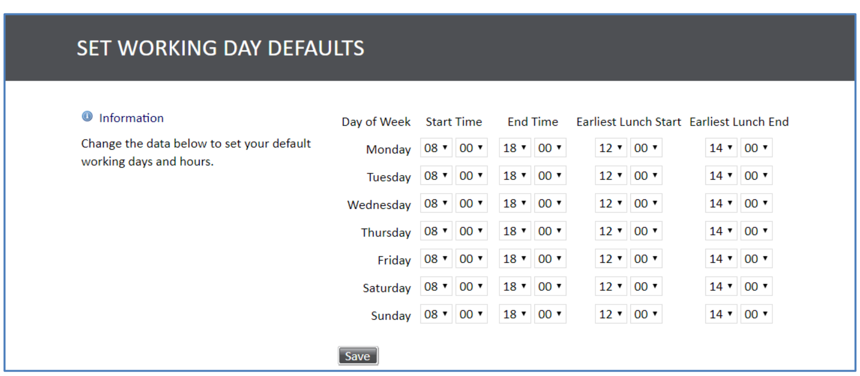



Figure 33: Setting regular working hours

## 6.6.2 Setting Exceptions to Regular Working Hours

This option allows the manager to define non-standard working hours where they are different than their default hours for whatever reason.

The working days table should not be used to take into account holidays or training days by selecting the dates as a non-working day.

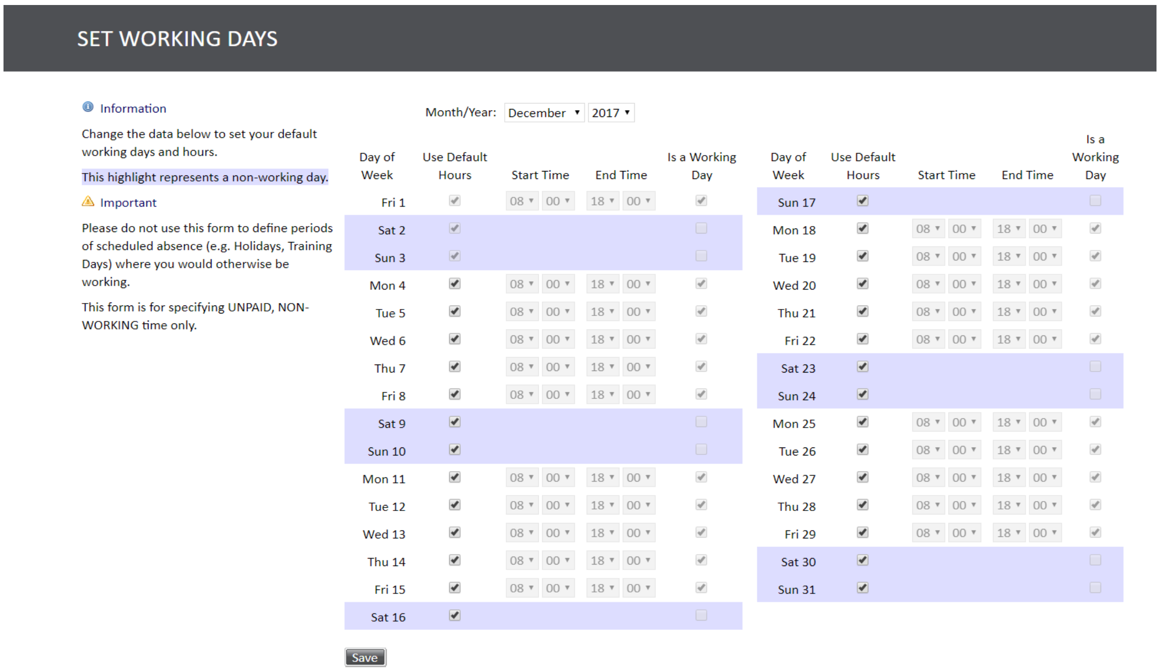



Figure 34: Setting exceptions to regular working hours

From the **Locations** tab, check the box to the left of the location that you want to associate with the manager. This is required as part of the meeting scheduling process, and will be covered in the **Meeting** section of this document.

After checking the relevant location, click **Apply**.

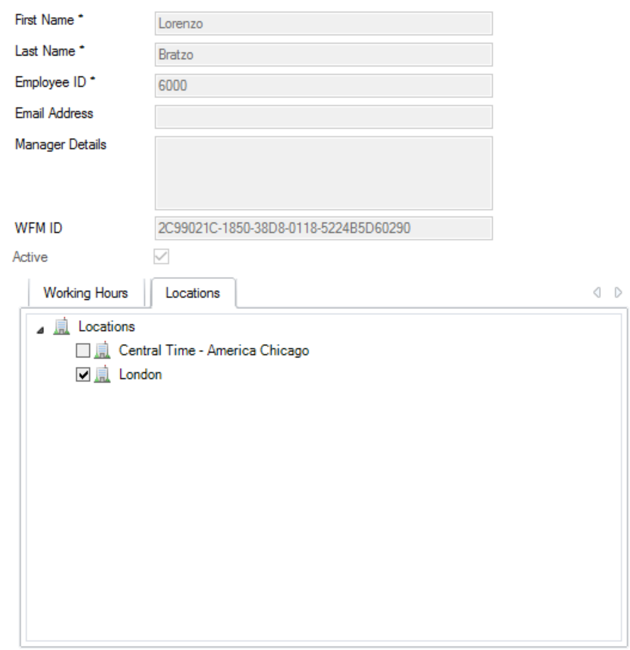



Figure 35: Associating locations with managers

### 6.6.3 Deleting Managers

Managers are maintained in Performance DNA. Updates there will populate through to Performance DNA.

## 6.7 Globally excluding agents

There are two tabs in the Meetings User Selection tab:

**Selection** – Allows for the selection of agents for the meeting

**Global Exclusions** – Mark individuals with reasons for non-scheduled activity, for example, long-term sick, reassignment, maternity, and so forth.

To globally exclude an agent:

- Right-clicking agents in the selection tab
- Select **Globally Exclude...**
- Enter a Reason for Exclusion
- Click OK

The user will then appear in the Global Exclusions tab. It is possible to edit/remove an exclusion by right clicking on the user in the Exclusions List view and selecting the relevant option.

There is also the option to exclude either locations or teams for a specific date.

Click the **By Date** tab, and the hierarchy from WFM will appear to the right of a calendar. To exclude sites or teams for a specific date, click a date and then check the box next to the team(s) or site.

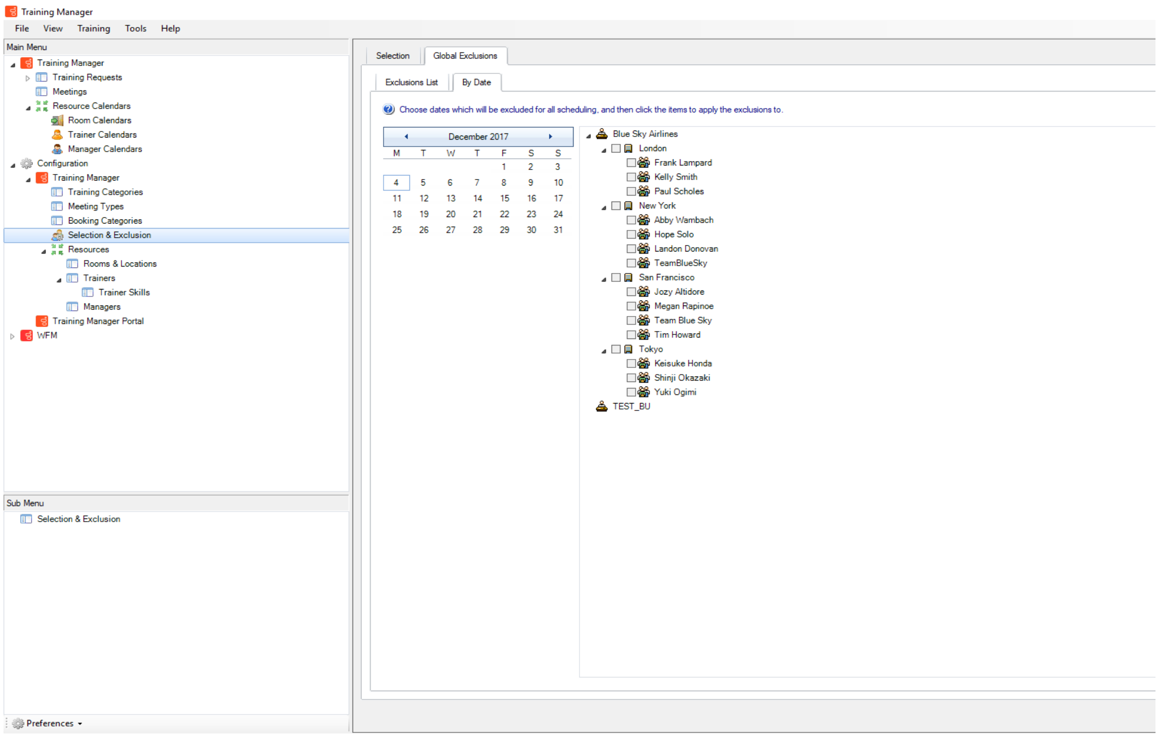



Figure 36: Excluding locations or teams by date

This will then highlight the date against the team.

To deselect a date and / or team, click the date and then un-check the team to remove the exclusion. When an exclusion has been set, the team or site can be selected as part of a training request but will not be scheduled on the configured exclusion date.

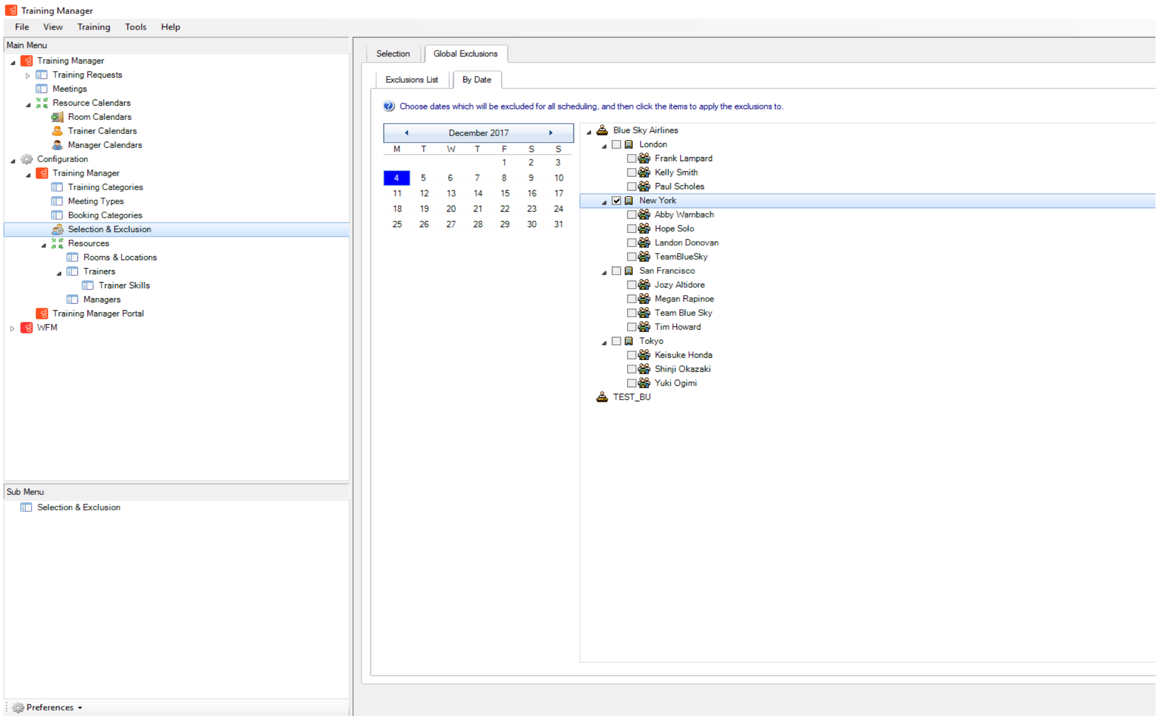



Figure 37: Removing exclusions

## 6.8 Viewing Scheduled Training Activity for an Individual

To view any historical training activity for an individual, find the individual in the **Main** view and then right click and select **Completion Status**.

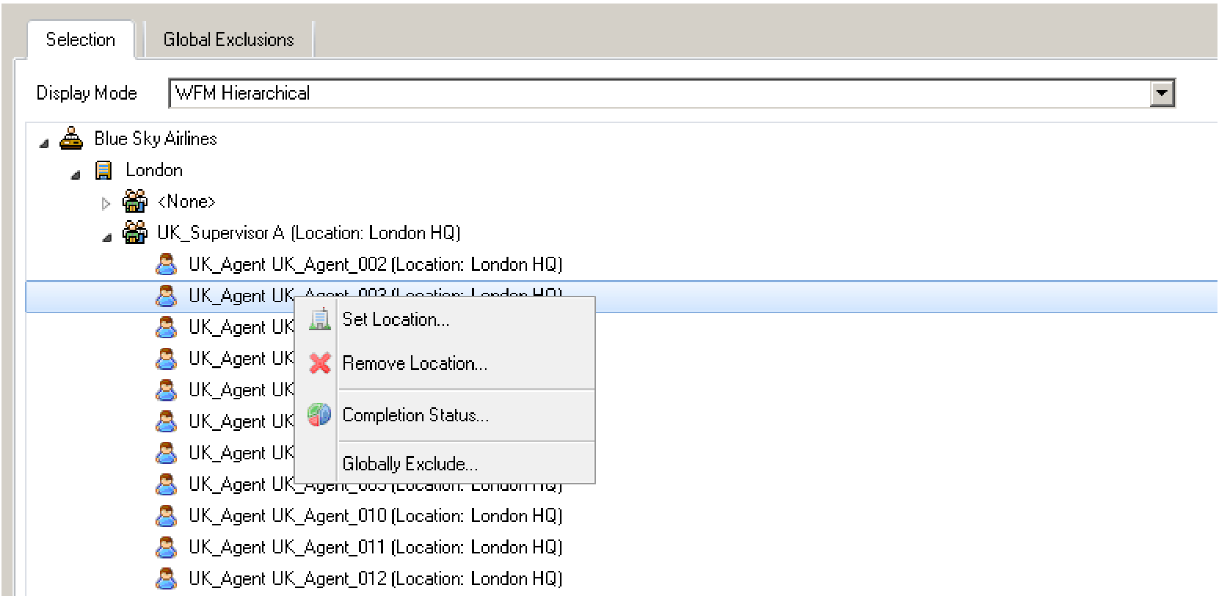



Figure 38: Viewing a user's past training activities

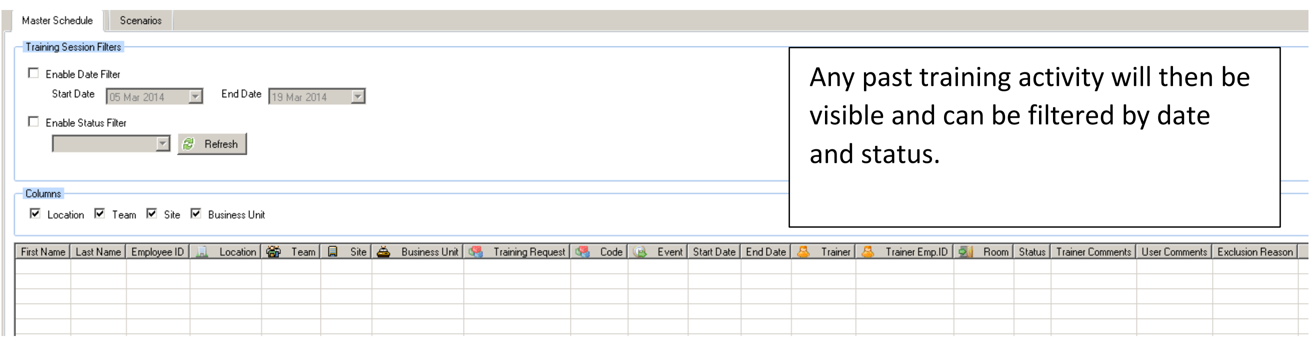



Figure 39: Viewing a user's past training activities

## 6.9 Room Bookings

### 6.9.1 Managing Room Bookings

Once rooms have been created they can be included as part of the optimized scheduling process.

The calendar management of the room must be kept up-to-date, as the application will avoid using any rooms that are not available.

Any scheduled room activity will automatically update the room calendar.

To manually enter a room booking, select **Room Calendars** from the **Main Menu**.

A similar tree view will appear in the **Sub Menu** listing all of the locations.

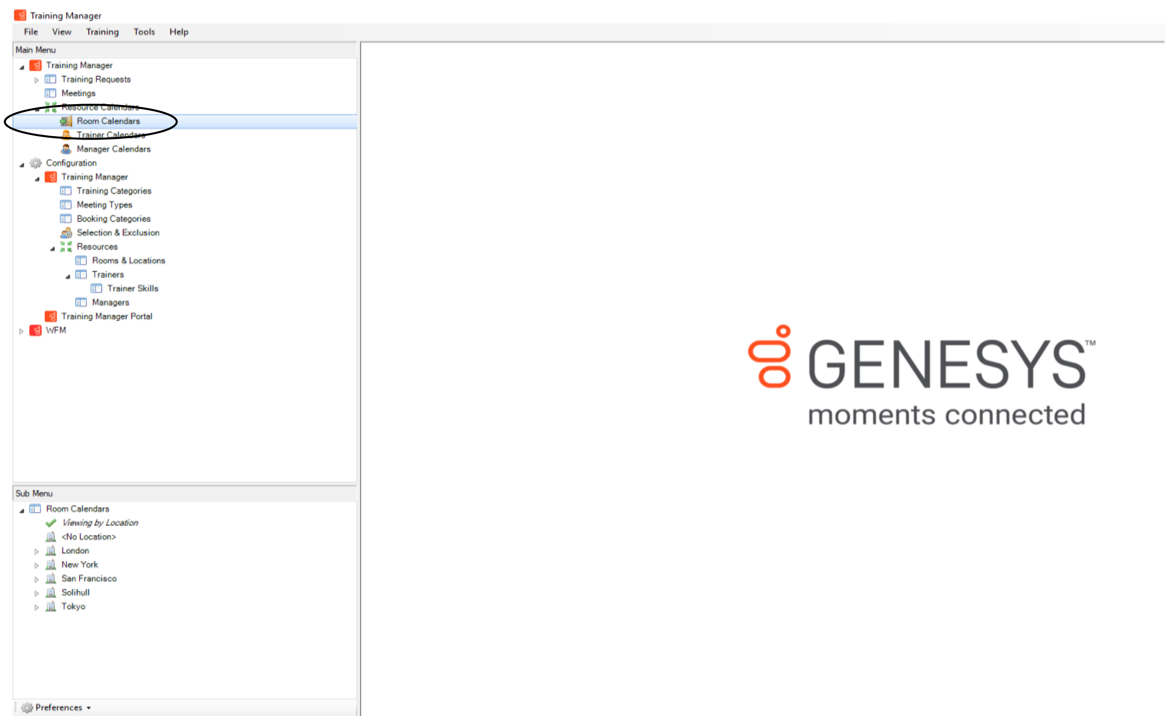



Figure 40: Manually creating a room booking

When you expand the location a list all of the rooms associated with it appears.

Right-click the required room and the **New Room Booking** option appears.

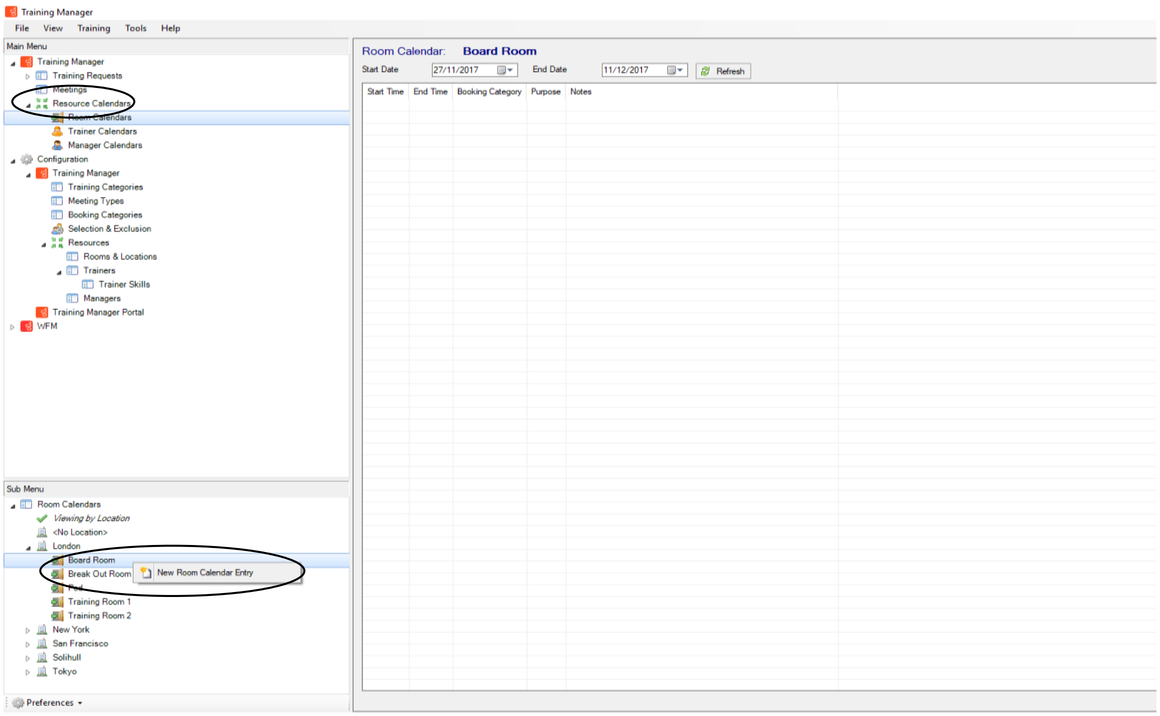



Figure 41: Manually creating a room booking

After selecting **New Room Calendar Entry,** the room booking form appears.

Complete the details as required and click **Apply**.

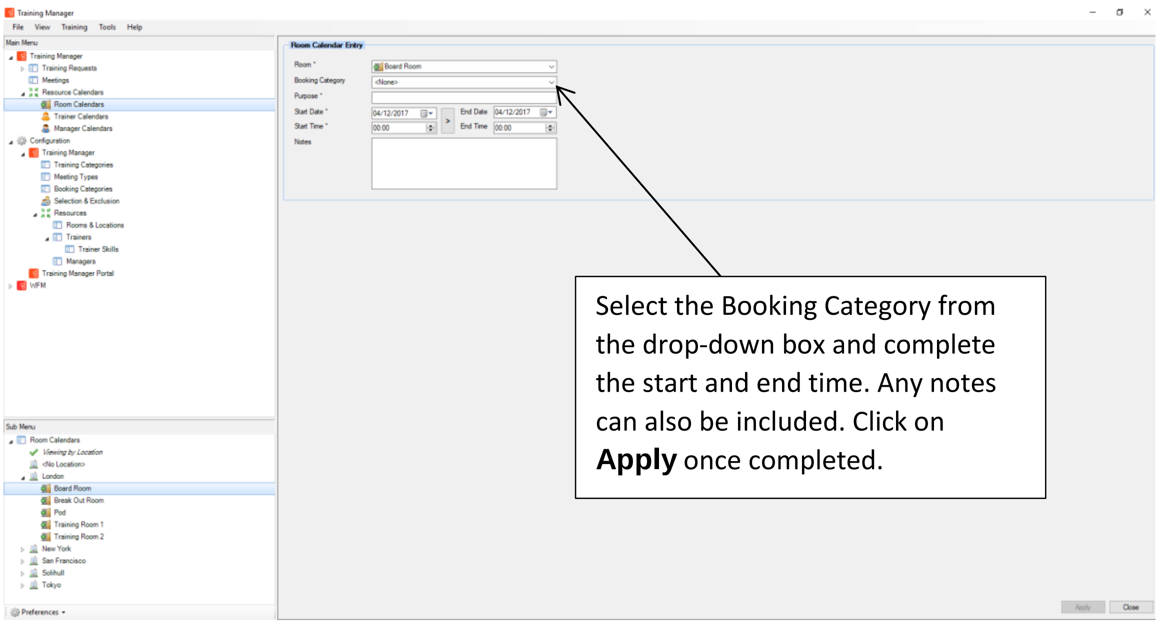



Figure 42: Manually creating a room booking

The Room Calendar will now be updated with the new booking and Training Manager will avoid scheduling any training on the date and time in question.

Only manually entered room bookings can be deleted in the Room Calendar.

### 6.9.2 Deleting a Manual Room Booking

To delete a manually-entered room booking, right-click the calendar entry and then select **Delete Calendar Entry…**

Training Manager will not allow deletion of any scheduled training activity in the Room Calendar.

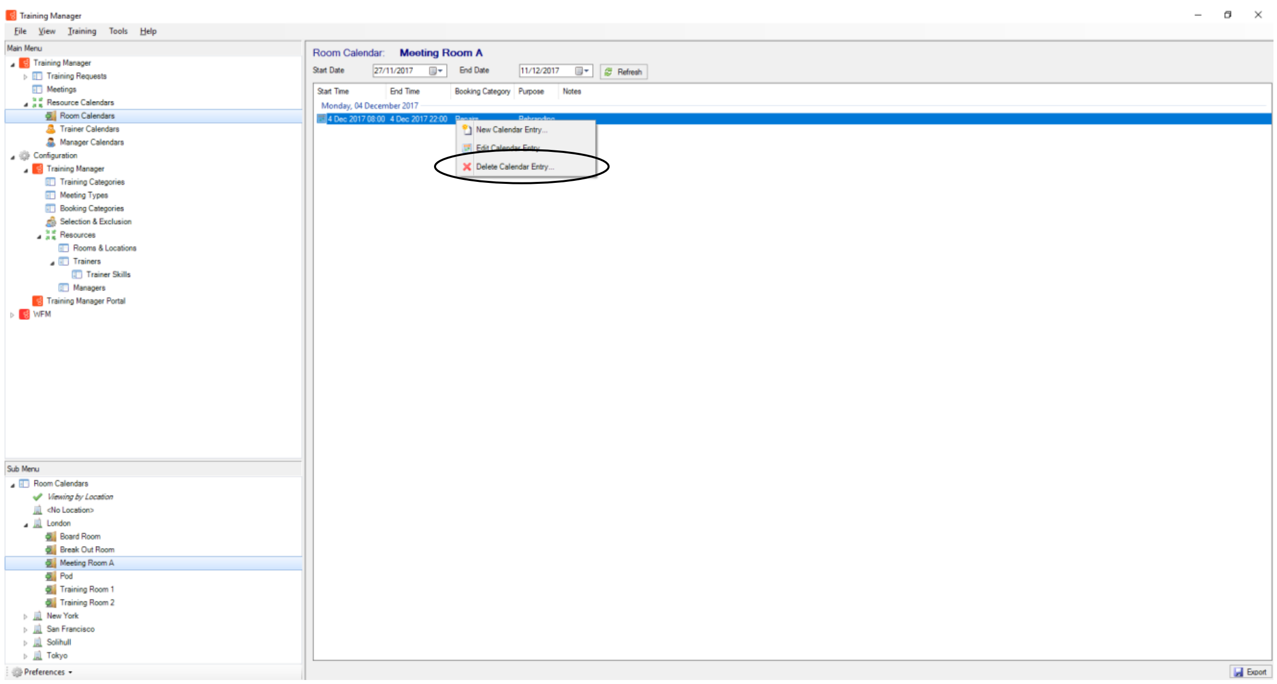



Figure 43: Deleting a manual room booking

## 6.10 Enhanced Trainer Configuration and Visibility

### 6.10.1 Trainer Hierarchy

The ability to create trainer hierarchy is managed through the Performance DNA hierarchy.

To view the trainer manager hierarchy, change the Sub Menu view to **View by Hierarchy** by right-clicking the **Trainers** option in the **Sub Menu**.


Figure 44: Viewing the trainer hierarchy

Expanding the detail in the **Sub Menu** will reveal the trainers that report to the trainer manager.

The trainer manager can view the trainers associated with them and can select to view their activity in the training portal.

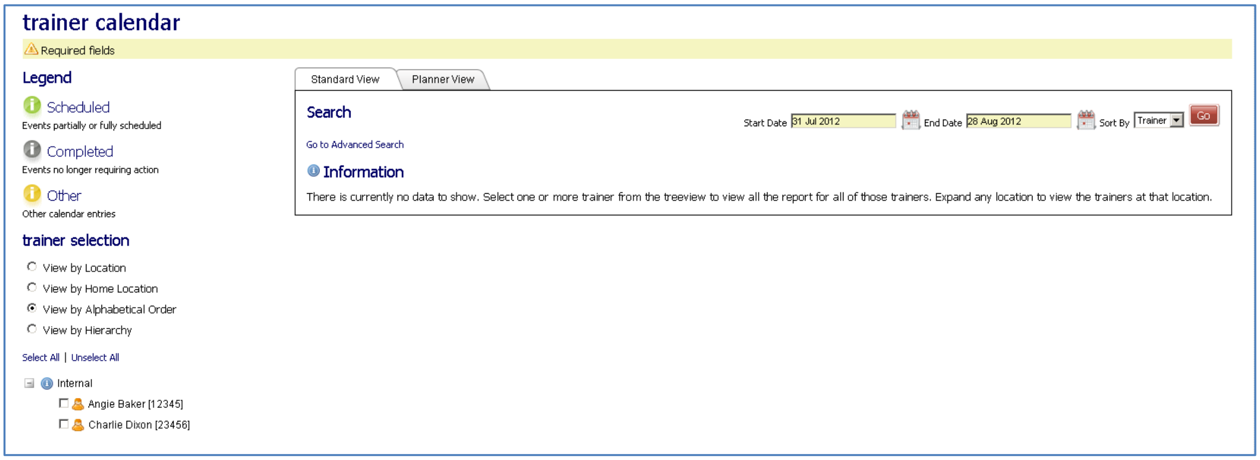



**Figure 45: Viewing trainer schedules within the Training Manager Portal**

## 6.11 Trainer Calendar

Trainer Calendar non-availability is managed either by updating the trainer calendar in Training Manager, or individual trainers updating their web portal calendars.

To manage trainer availability in Training Manager, select **Trainer Calendar** from the **Main Menu**. The locations are then listed in the **Sub Menu**. Right-click **Trainer Calendar** to amend the view if required.

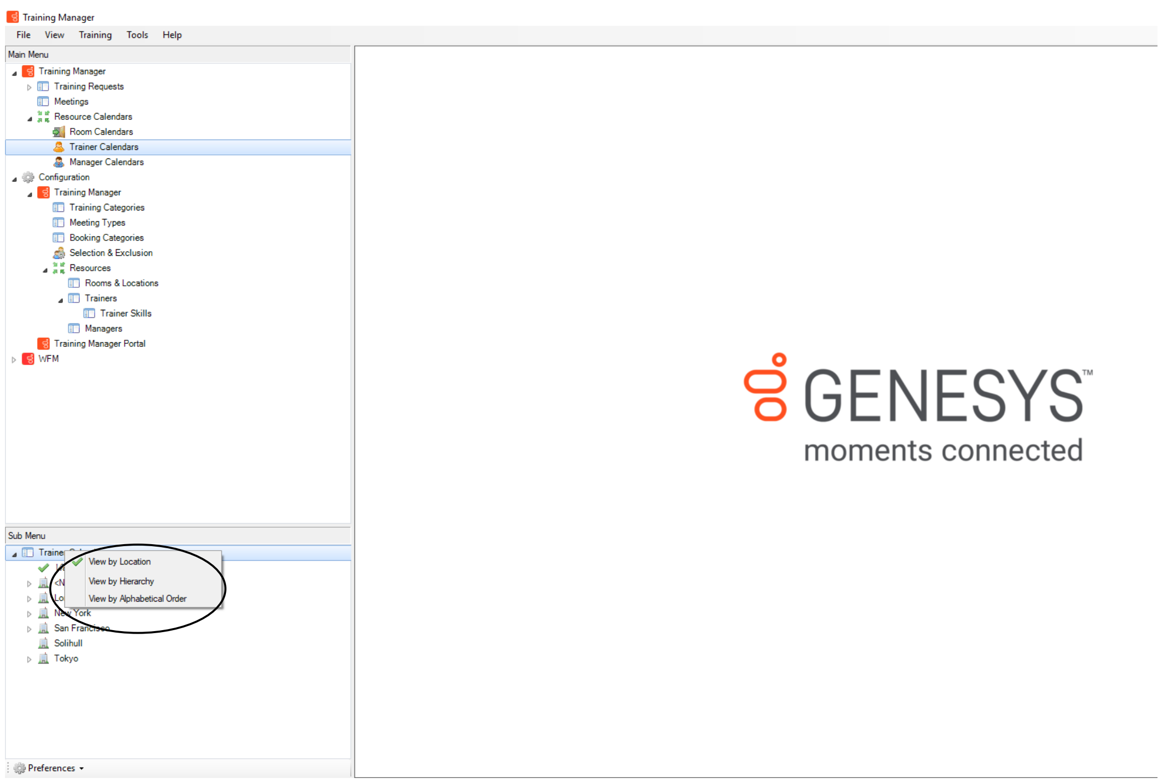



Figure 46: Setting trainer availability

To create a new calendar entry, right-click the required trainer and select **New Trainer Calendar Entry**.

There are also the options available to change the view.

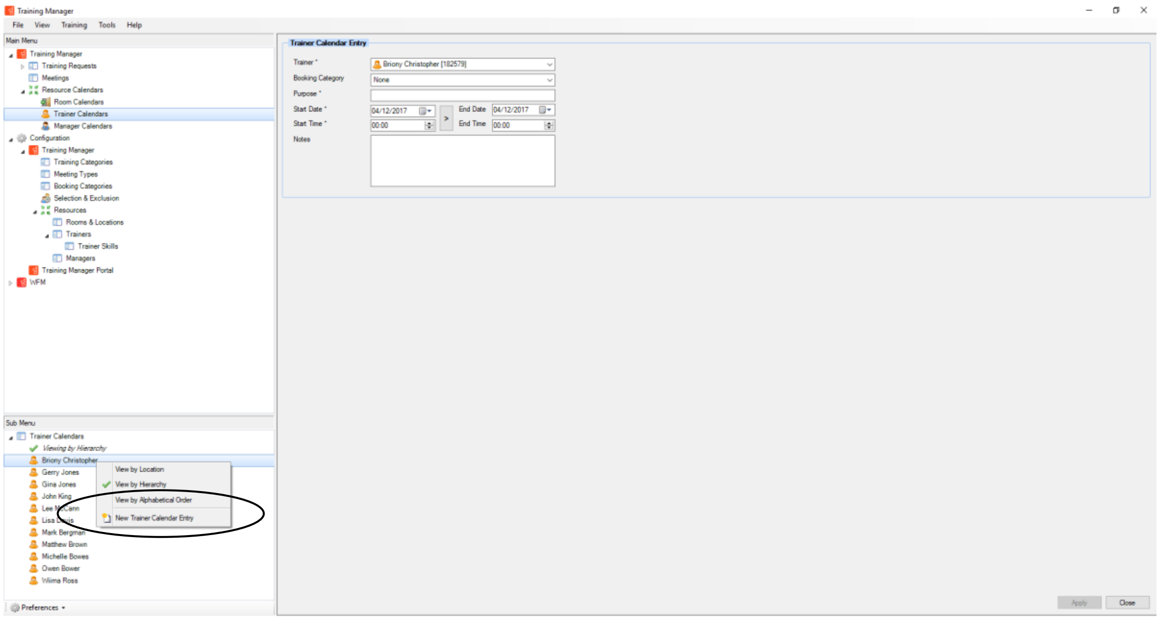



Figure 47: Setting trainer availability

Complete the details as required, select **Booking Category** from the drop-down menu, and then click **Apply** once all of the details have been entered.

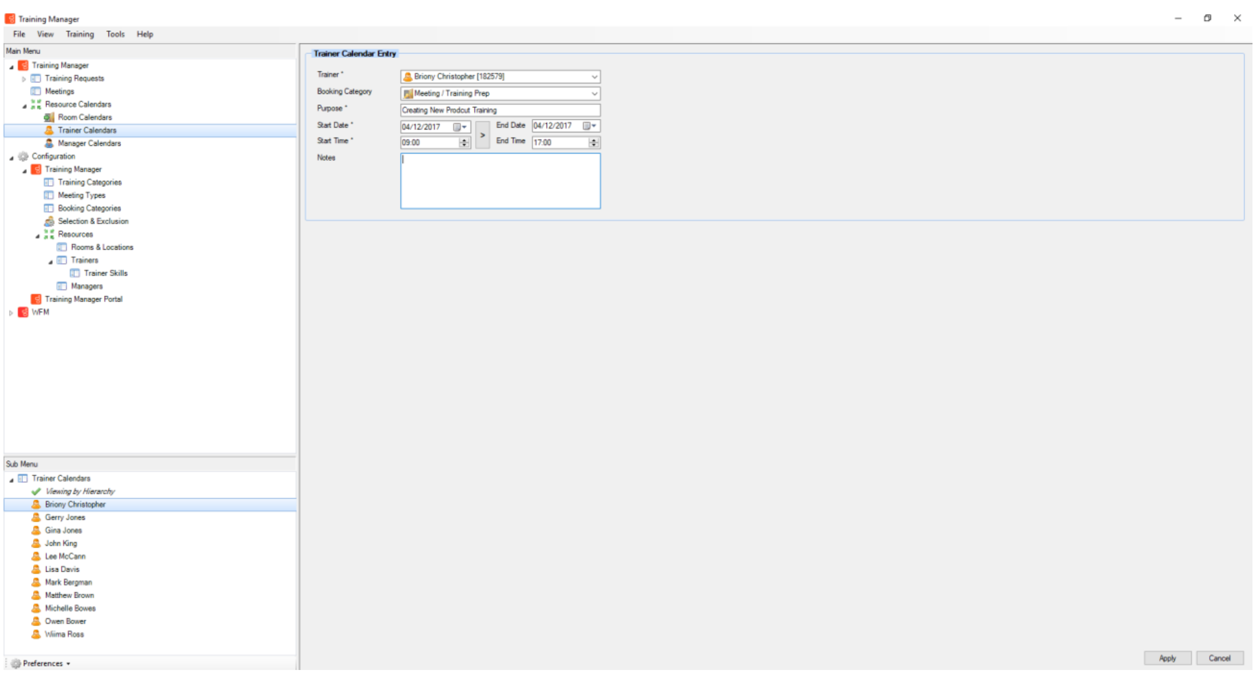



Figure 48: Setting trainer availability

To delete a Trainer Calendar entry right-click the calendar entry and select **Delete Calendar Entry…**

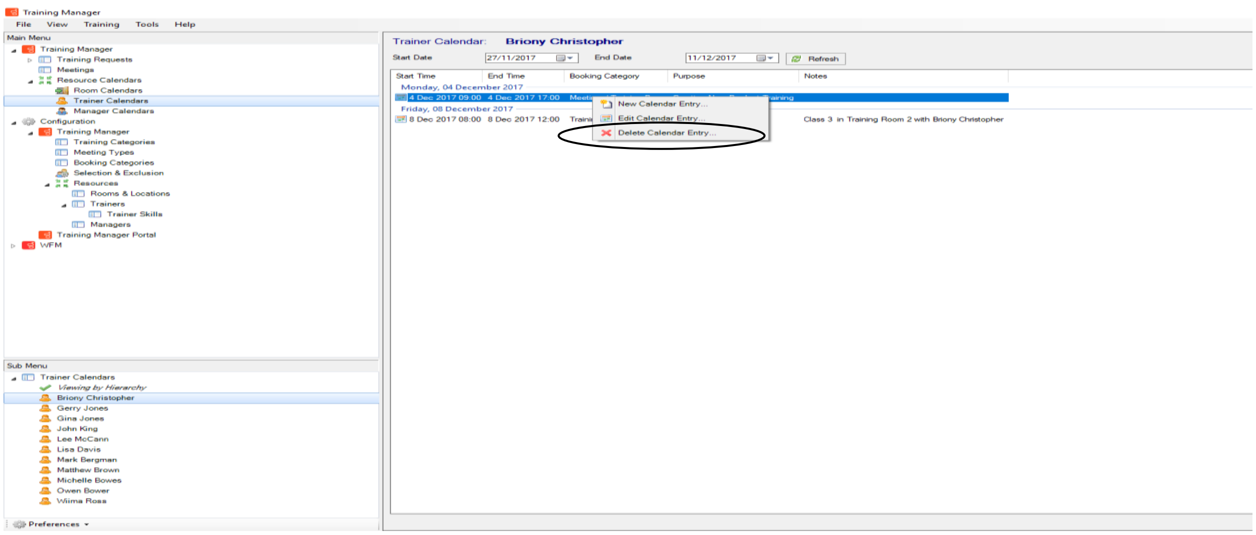



Figure 49: Deleting a trainer calendar entry

The trainer can also manage their availability through their training portal. The option to insert any new activity is available within the **Training Manager View** of the **Trainer Calendar** by right-clicking in the calendar and selecting **New**.

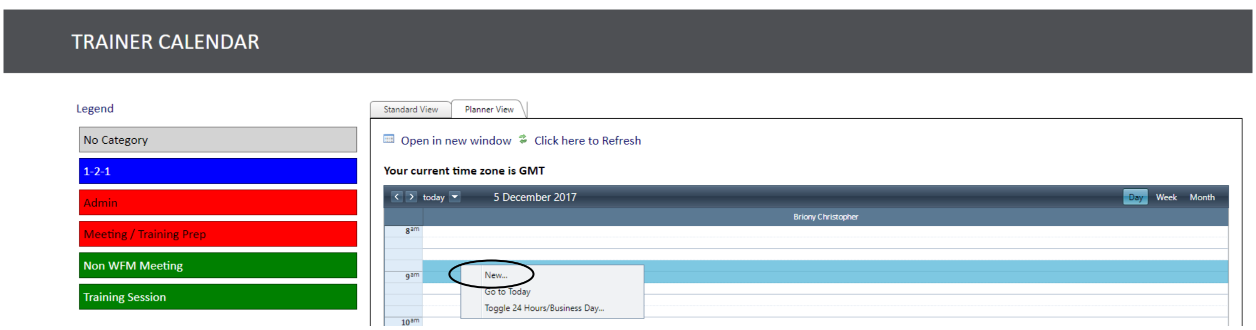



Figure 50: Managing trainer availability through Training Manager Portal

## 6.12 Training Categories

The training categories are linked to the exception codes in WFM, and a training category must be selected when creating a training request. When training is scheduled it is the exception code that is displayed in the agent schedules, and therefore must already exist in WFM. Genesys WFM takes into account the impact of the exception code on the staffing levels as part of the WFM configuration.

To create a new training category, select **Training Categories** from the **Main Menu;** a list of existing categories appear in the **Sub Menu**.

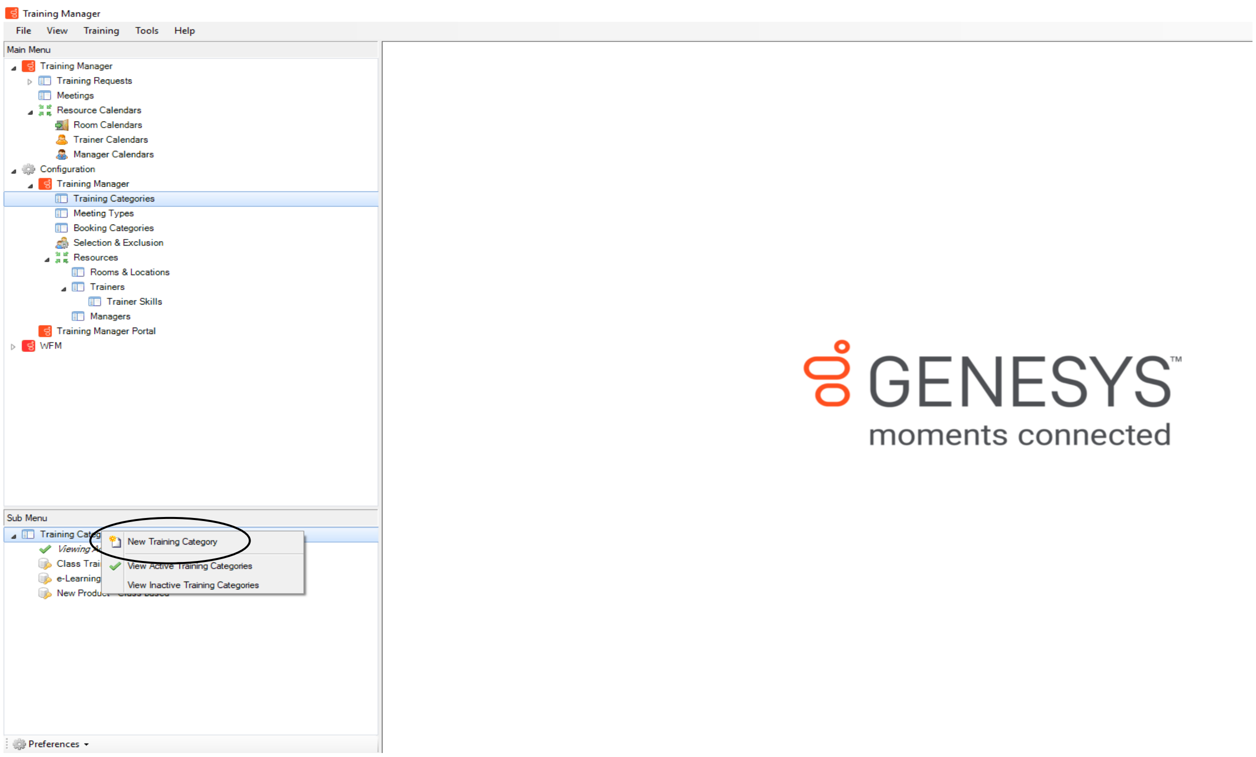



Figure 51: Creating a new training category

Right-click **Training Categories** in the **Sub Menu** and the **New Training Category** option appears.

To create a new category, right-click **Training Categories** in the **Sub Menu** and select **New Training Category**.

Enter a new name together with any relevant notes.

Use the drop-down Activity Code list to select the correct activity code from WFM to associate to the training category (this will ensure that the WFM rules and reporting is correct). After selecting the required exception code, click **Apply**.

Please note that **Training Manager does NOT create exception codes in WFM.**

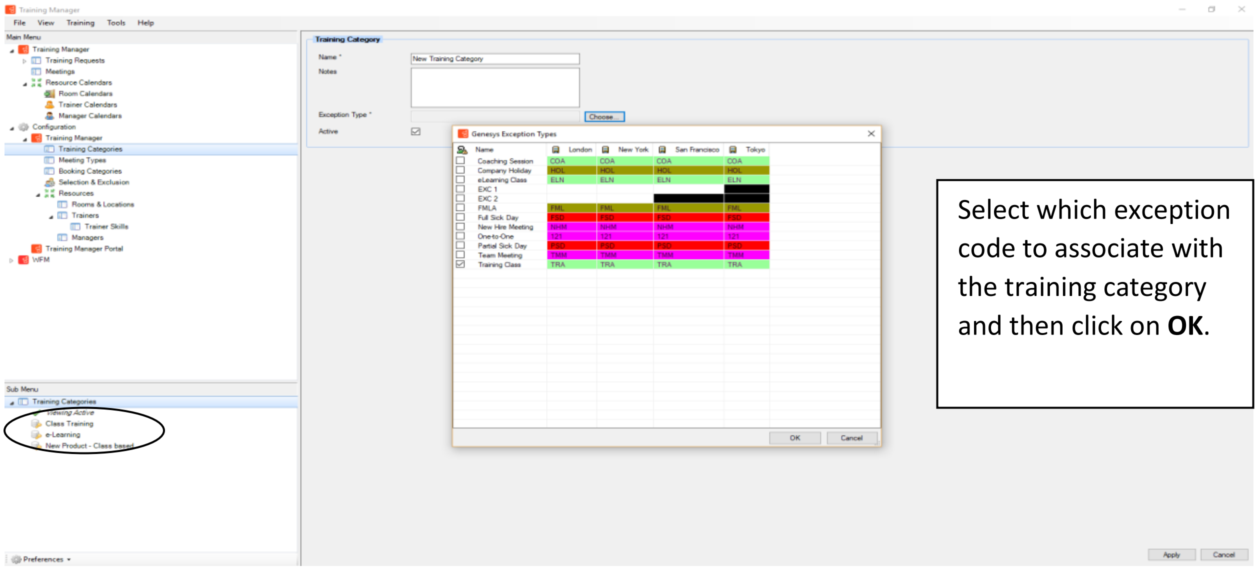



Figure 52: Creating a new training category

### 6.12.1 Deleting a Training Category

To delete a training category in Training Manager, right-click the training category and select **Delete Training Category**.

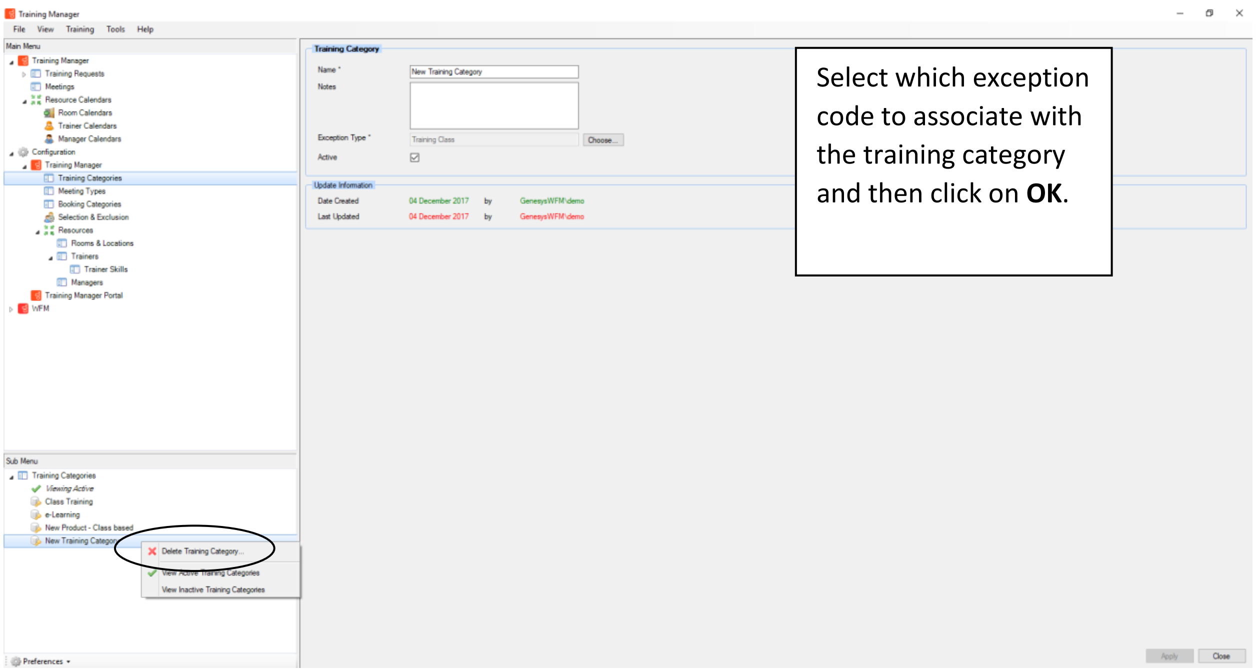



Figure 53: Deleting a training category

## 6.13 Meeting Types

Meeting types are used when creating and scheduling meetings and one-to-ones that include the team manager. Different algorithms have been created to manage team group meetings or individual agent meetings which include the team manager. These algorithms must be associated with the correct meeting type.

Select **Meeting Type** from the **Main Menu.** Any existing meeting types are now visible in the **Sub Menu**.

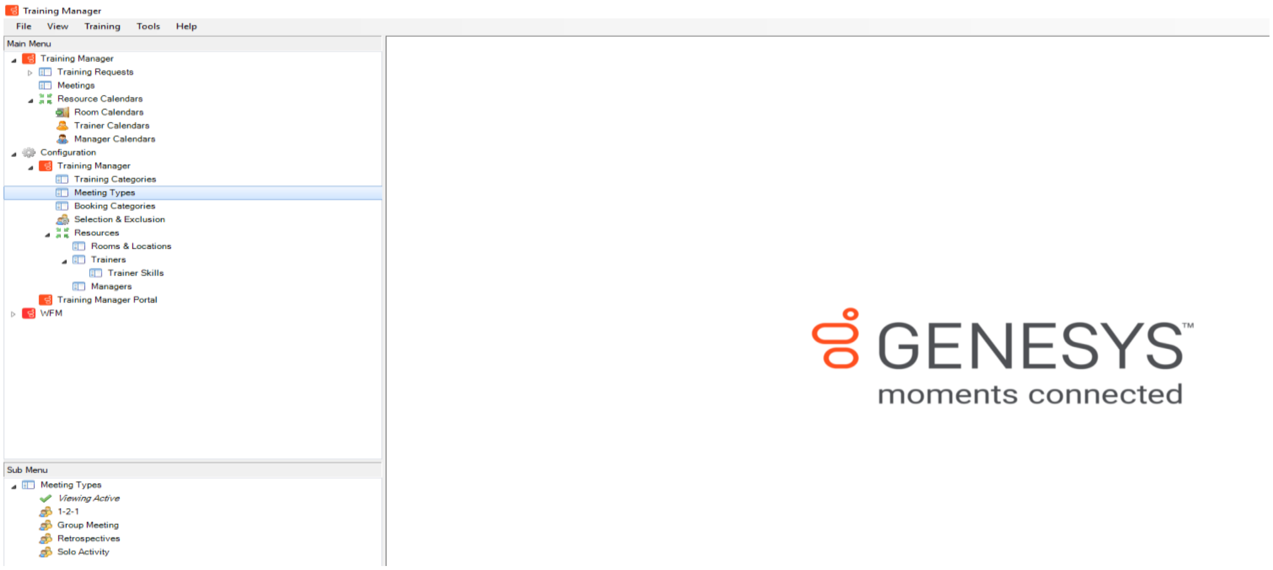



Figure 54: Viewing existing meetings by type

To create a new meeting type, right-click **Meeting Types** in the **Sub Menu** and select **New Meeting Type**.

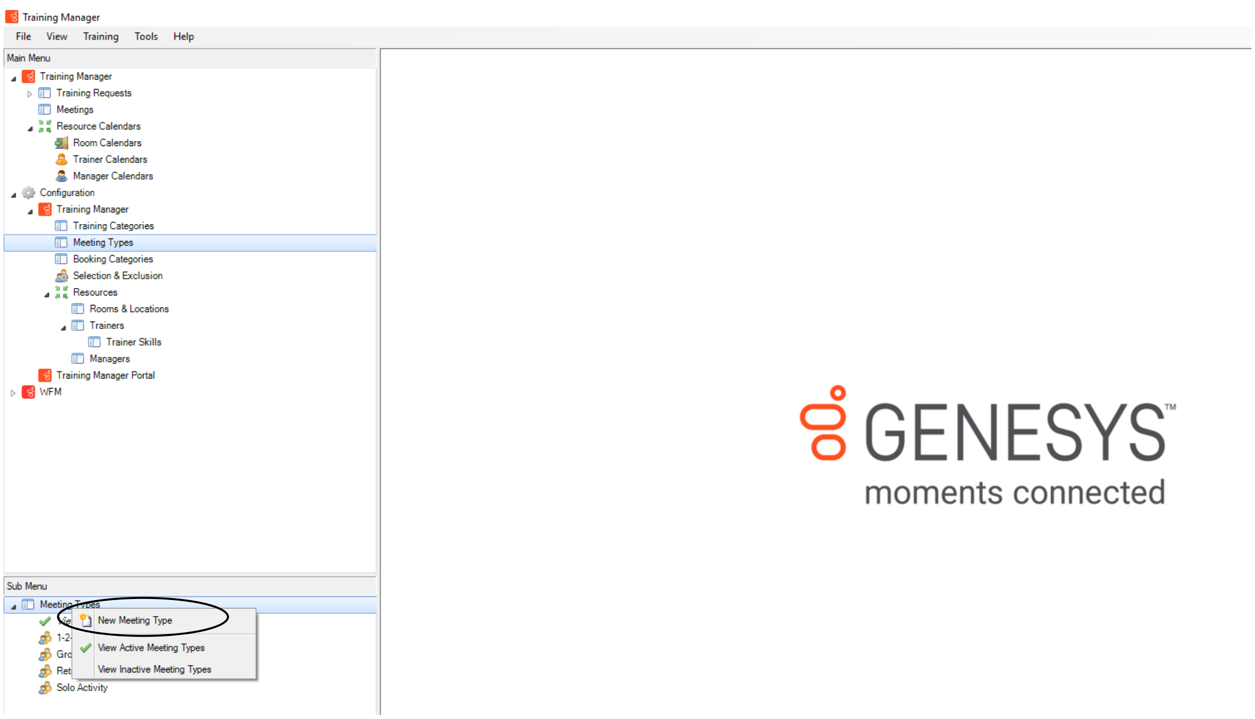



Figure 55: Creating a new meeting type

Complete the details as required, selecting the correct booking algorithm from the drop-down menu:

- **Meeting** – Group and team manager
- **One To One** – individual agent and team manager
- **Solo Task** – individual agent

Meeting types are configured the same way as training categories. As with training categories used in training requests, the WFM exception code must already exist in WFM and exactly match the **Default WFM Exception** code entered.

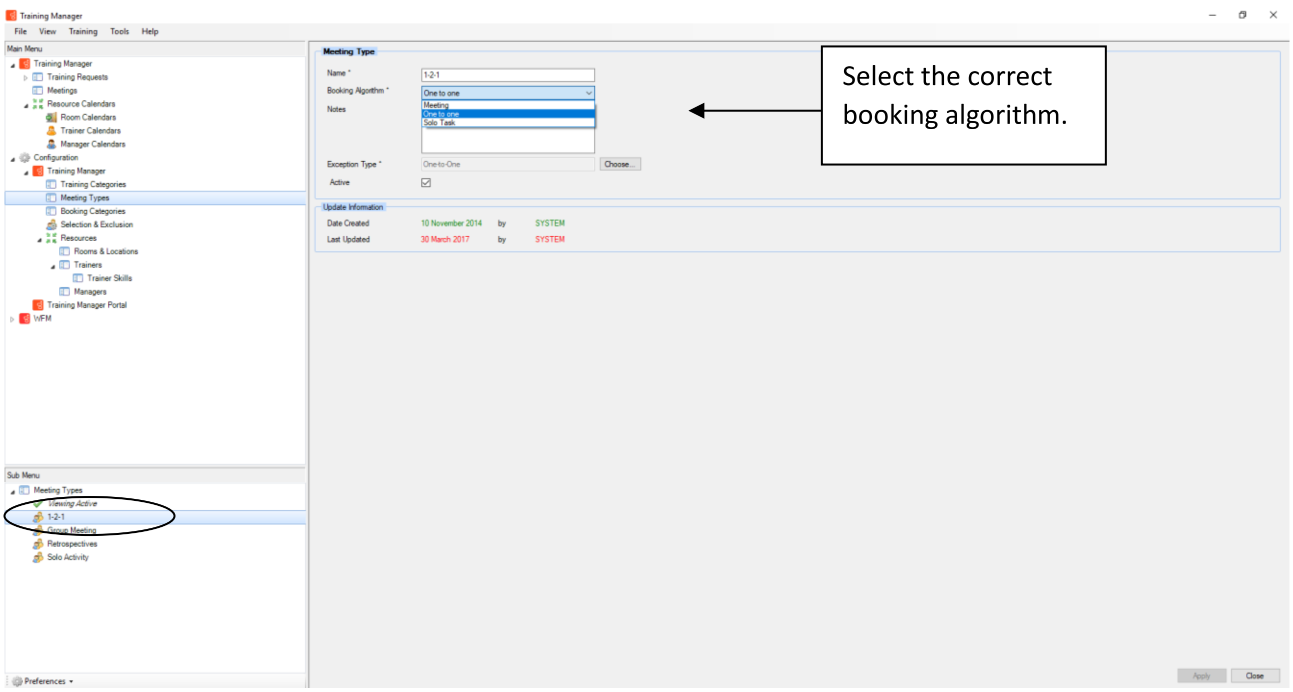



Figure 56: Creating a new meeting type

Use the drop-down box to associate the correct Activity code.

After selecting the Activity code, you want, click Apply to save your selection.

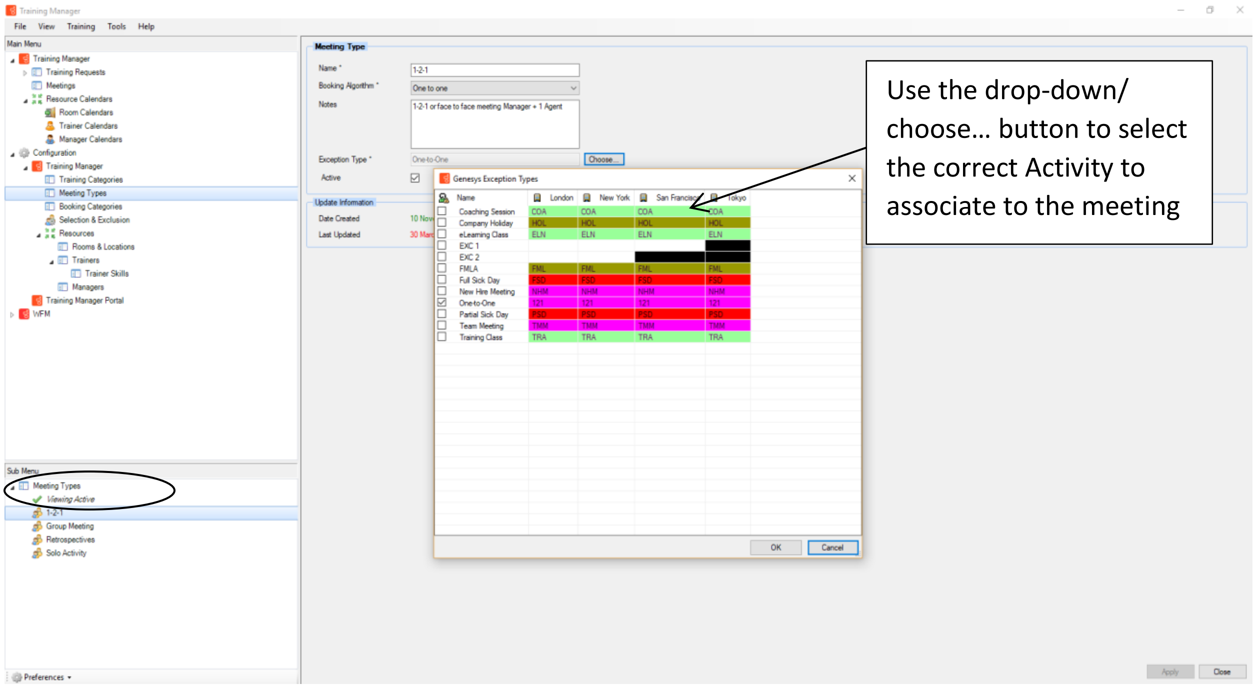



Figure 57: Associating an activity with the meeting type

### 6.13.1 Deleting Meeting Types

Delete a meeting type by right-clicking the meeting type and selecting **Delete Meeting Type...**

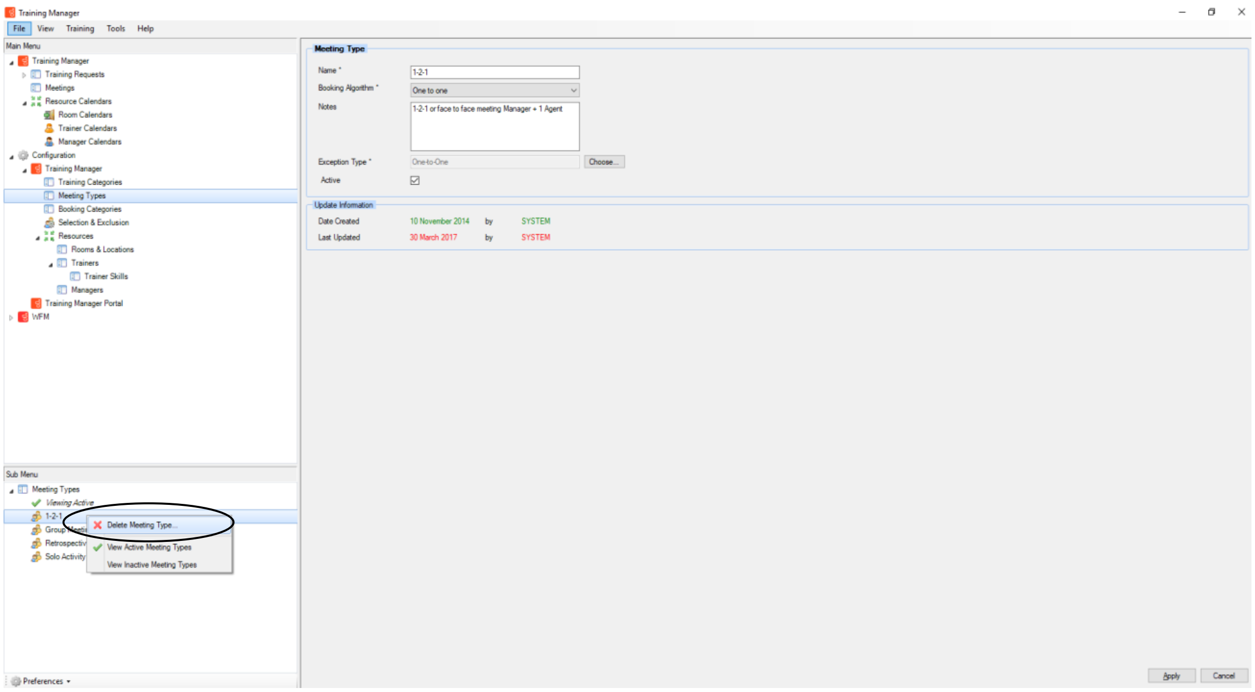



Figure 58: Deleting a meeting type

## 6.14 Booking Categories

Booking categories are created for use in Portal for recording non-available time for managers and trainers.

Management meeting and Training session booking categories are for use when scheduling training and meetings in Training Manager and cannot be deleted or amended.

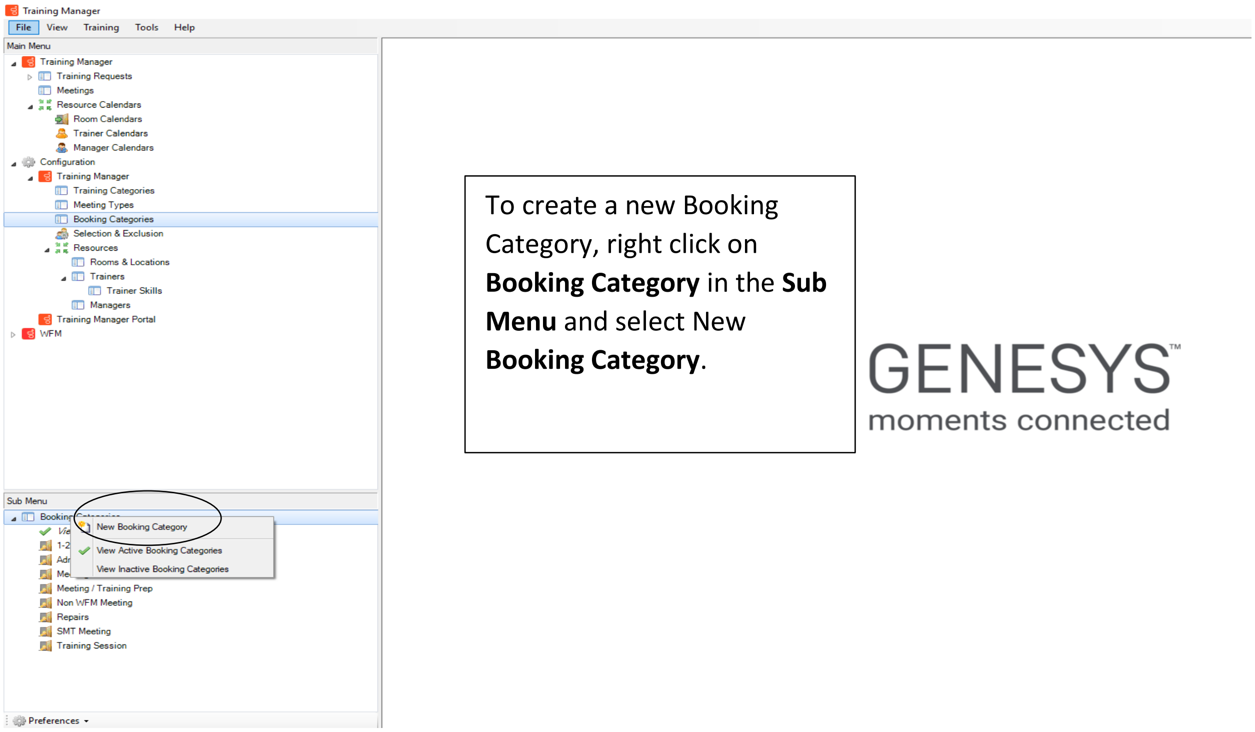



Figure 59: Creating a booking category

Give the booking category a name and select a colour to be displayed in the web portal.

There are several options now available for selection:

Room Calendar Category – Selecting this in the booking category applies to the room calendar. *This would not be applicable if the booking category was holiday.*

Trainer Calendar Category – Selecting this in the booking category applies to the trainer calendar.

Manager Calendar Category - Selecting this in the booking category applies to the manager calendar.

Is Working Time –This is not selected if this booking category does not constitute working time e.g. personal time which is unpaid by the organisation.

Active –The booking category is active and available for selection.

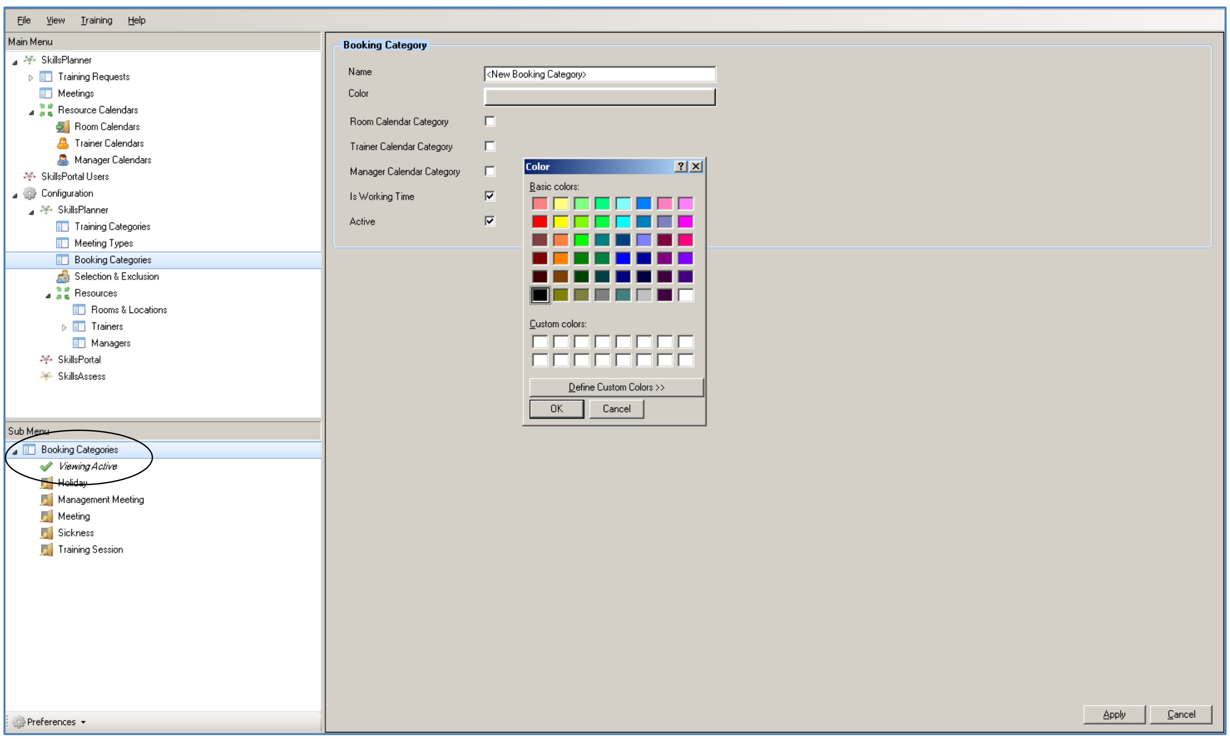



Figure 60: Creating a booking category

# 7 Training Manager Portal

## 7.1 Training Manager Portal Users

Training Manager Portal users are now configured in Performance DNA.

## 7.2 Training Manager Portal Configuration

Select the **Portal** menu option under **Configuration** to reveal additional functionality.

### 7.2.1 Authentication

There are Authentication options available in the Portal Configuration window that determine what mechanism is used when logging in.


Figure 61: Portal authentication configuration

### 7.2.2 Display of Items in Portal

Any changes required to the welcome or header title in Portal are managed in Training Manager, as are visibility of items on the training roadmap and the manager freeze window (i.e. the number of days that cannot be edited).

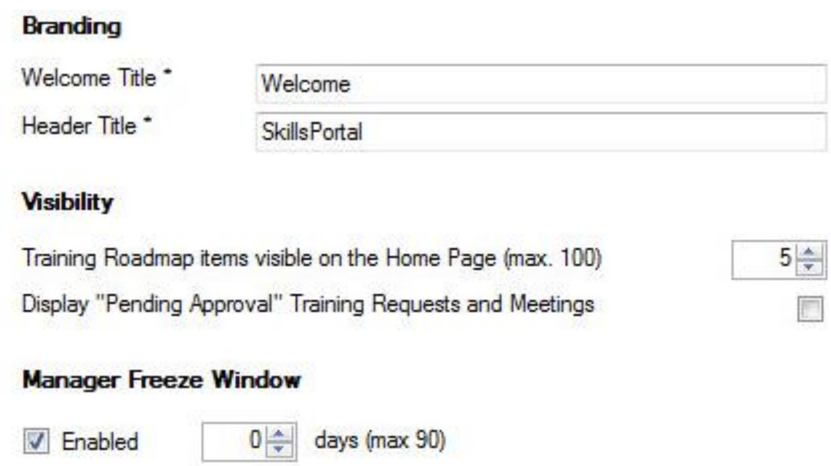



Figure 62: Portal item display configuration

### 7.2.3 Attendees in Calendar Requests

This setting controls when attendees are included in emailed and downloaded session notifications.


Figure 63: Attendees in calendar requests configuration

### 7.2.4 Pre-requisites for the Auto-Schedule Booking Requests from Portal Feature

To enable the auto-schedule booking requests from Portal feature, the feature must be enabled in the Configuration> Training Manager Portal screen in Training Manager and the WFM Settings must be validated.

To enable the feature, select the Configuration > Training Manager Portal option from the main menu in Training Manager. **Tick the Allow Auto-Scheduling of requests from Portal** option. Complete the User Name, Password, WFM Server Host WFM Server Proxy (optional) and Use HTTPS for WFM Connection (optional). Once these settings have been specified. Click the Validate WFM Settings button to test the provided settings. Click apply when the **Validation succeeded** message appears.

The option to automatically schedule booking requests through Portal will now be available providing at least one booking type exists and it has been mapped to a valid set of scheduling parameters via Portal.

# 8 Training Requests

To raise a training request, select **Training Request** from the **Main Menu;** the training request status menu will appear in the **Sub Menu**.

Training requests can be created by either right-clicking **Training Request** in the **Sub Menu**, or clicking the **Training** option above the **Main Menu**.

Create a training request through the relevant status option; for example, **Pending Approval**, and the application will automatically store the request.

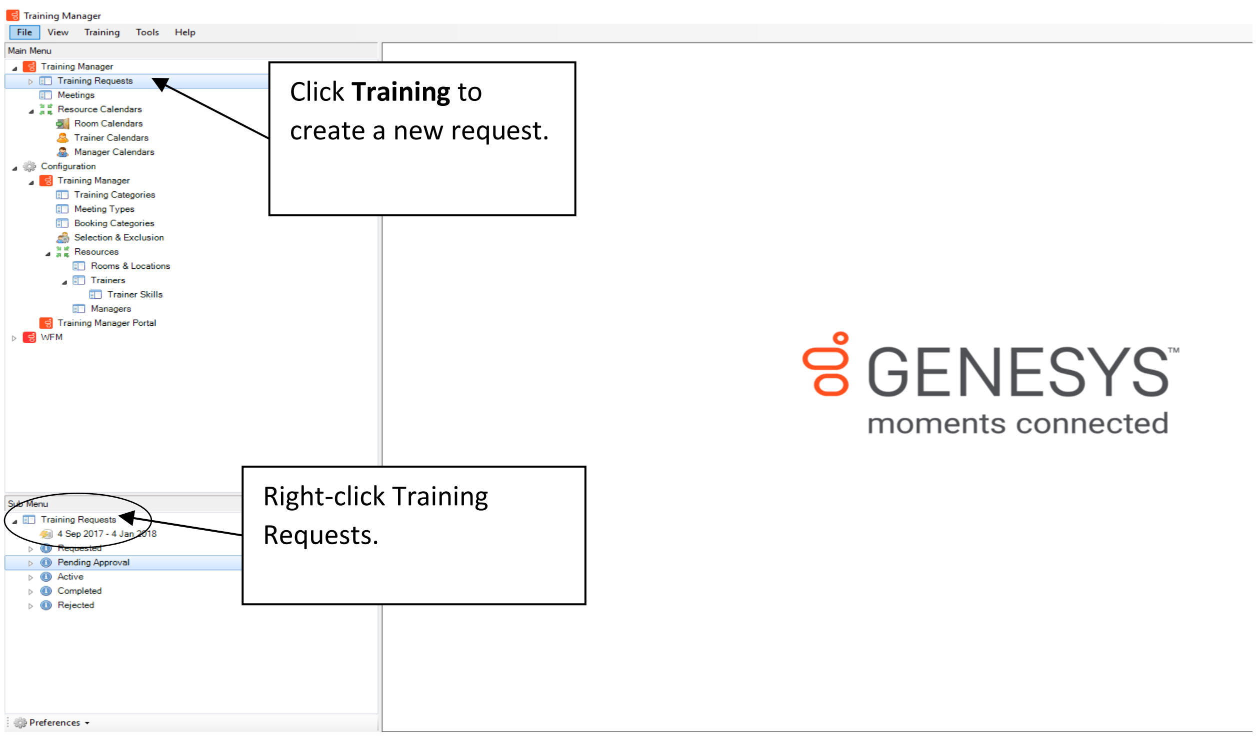



Figure 64: Creating a training request

When the **New Training Request** option is selected, the template will appear, as in the example below.

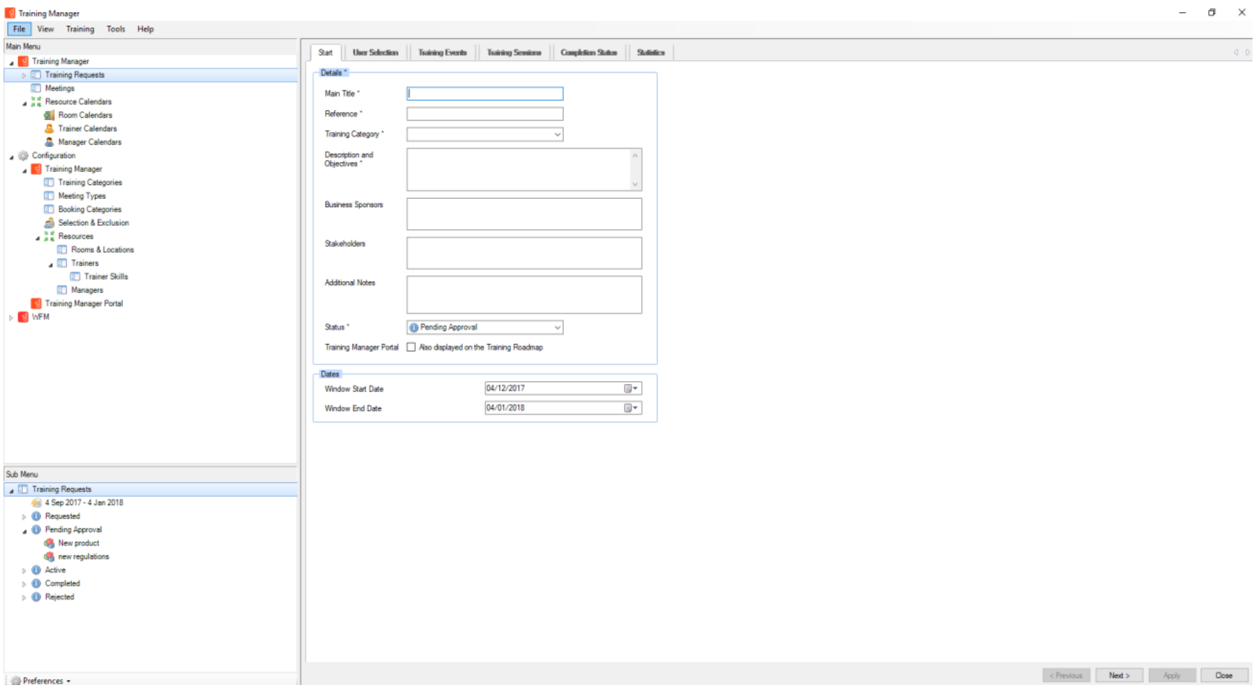



Figure 65: Creating a training request

Complete the template as required (each of the tabs in the template will be covered separately).

## 8.1 Training Request Start Date Filter

A training start date filter is available as an option underneath Training Requests.

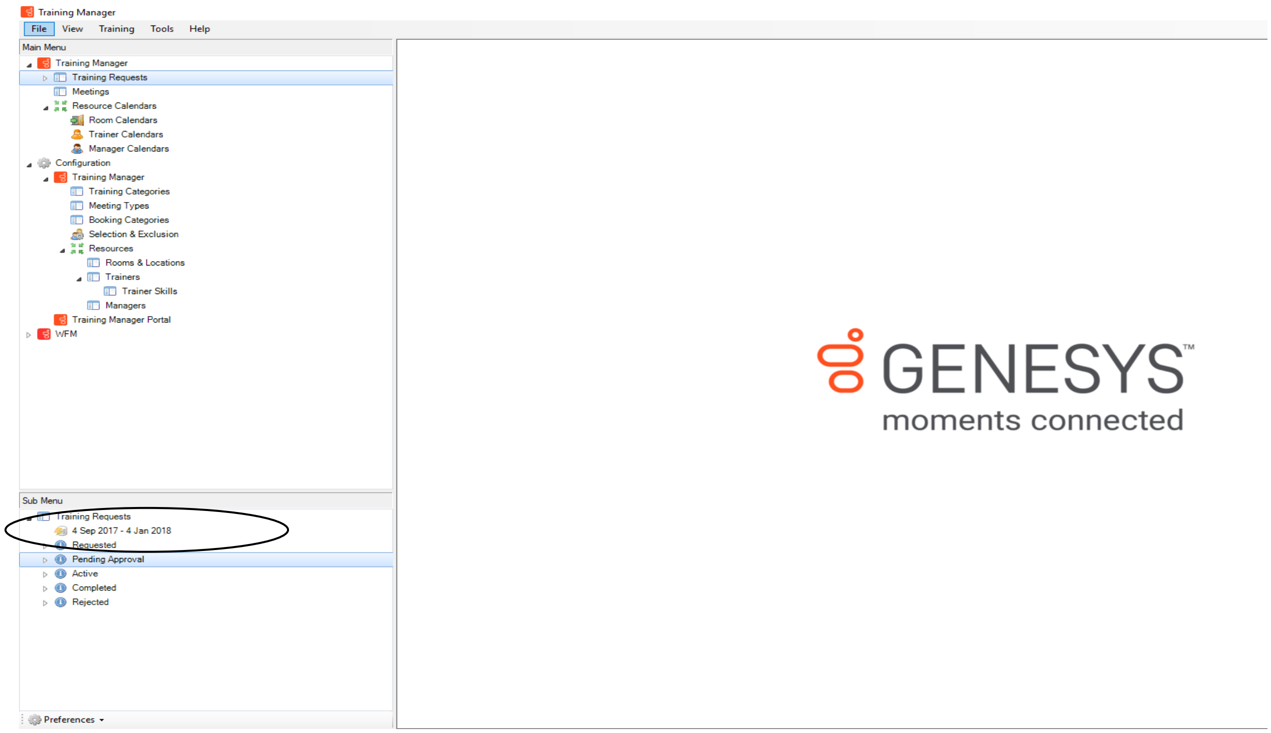



Figure 66: Training window start date filter

Training requests created outside of the date range will not be visible until you select the relevant date range.

Right-click the date filter; the option to open the training window filter appears, as in the example below.

Enter the required start date range and then click **OK**.

Only training requests that started within the date range selected will then be visible.

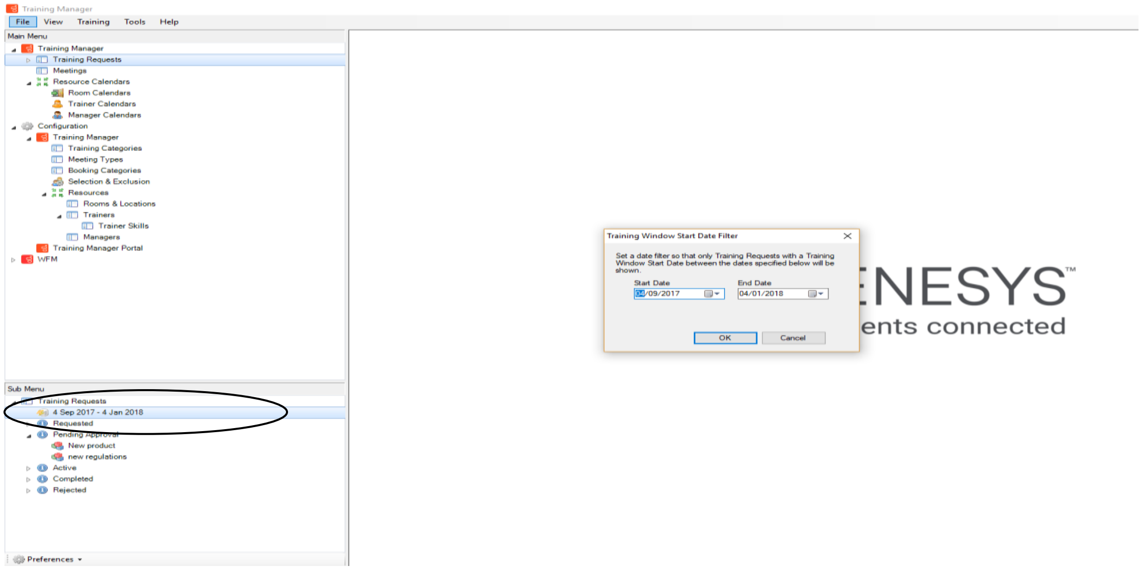



Figure 67: Setting the training window start date filter

## 8.2 Start Tab

**Main Title & Reference** – enter a title, and then enter the training code in the field to the right (this is mandatory).

**Training code** –the code associated with the training. This could be a code associated to some e-learning content.

**Training Category** – identifies the category of training and the exception code that will be inserted into the agent schedules in WFM. The categories are available from a drop-down menu.

**Description & Objectives –**should contain information relevant to the training and will show against the training in the training roadmap.

**Business Sponsors / Stakeholders / Additional Notes** – enter any information here that is relevant to the training request. This information will also appear against the training in the training roadmap.

**Status** –three options are available from the drop-down menu:

- **Pending Approval** – this is used in the first instance when a training request is raised.

- **Active** – this is used when the training request has been committed to WFM and is "good to go." For a training request to be visible in the web portal, the training request must be shown as **Active** and have **Displayed** selected on the **Training Roadmap**.
- **Completed** – is used to store any completed training request.

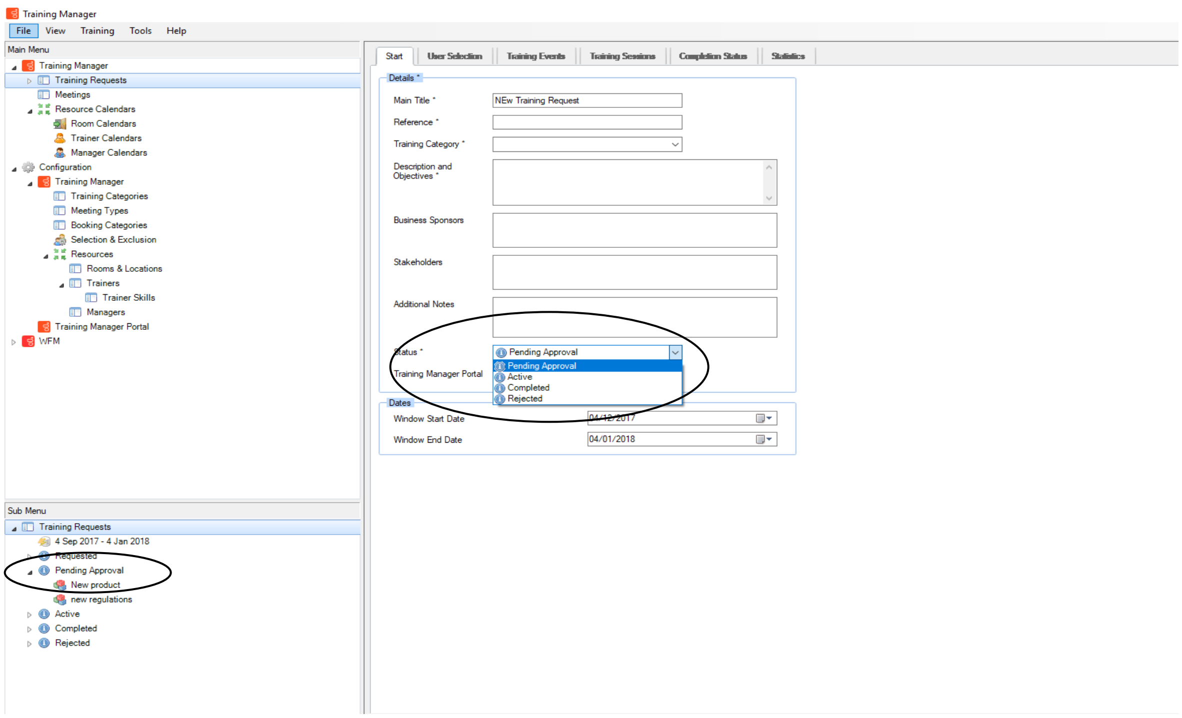



Figure 68: Creating a training request

By default, the training window dates will display one month from today's date. This can be manually changed so that training will be scheduled within a different date range.

The template will be updated with the administrator details (who created or updated the request and the date).

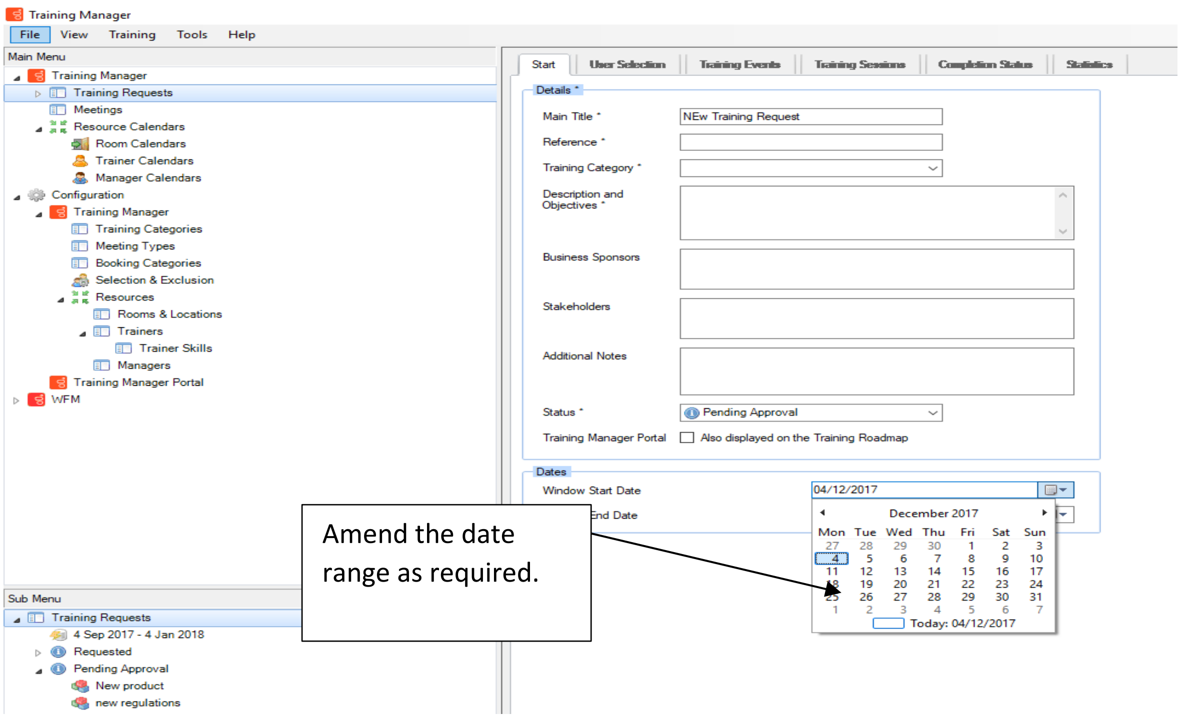



Figure 69: Creating a training request

Once all of the information has been completed, select **Apply,** or click the **User Selection** tab to move to the next stage.

## 8.3 User Selection

This is where the users are selected (there can be multiple selections).

In the example below, there are multiple sites and teams to select users from. Full teams or individual users can be selected by expending the Agent Group and selecting individual agents. A user count will be visible at the bottom of the screen.

There is the option to select individual agents or select all agents.

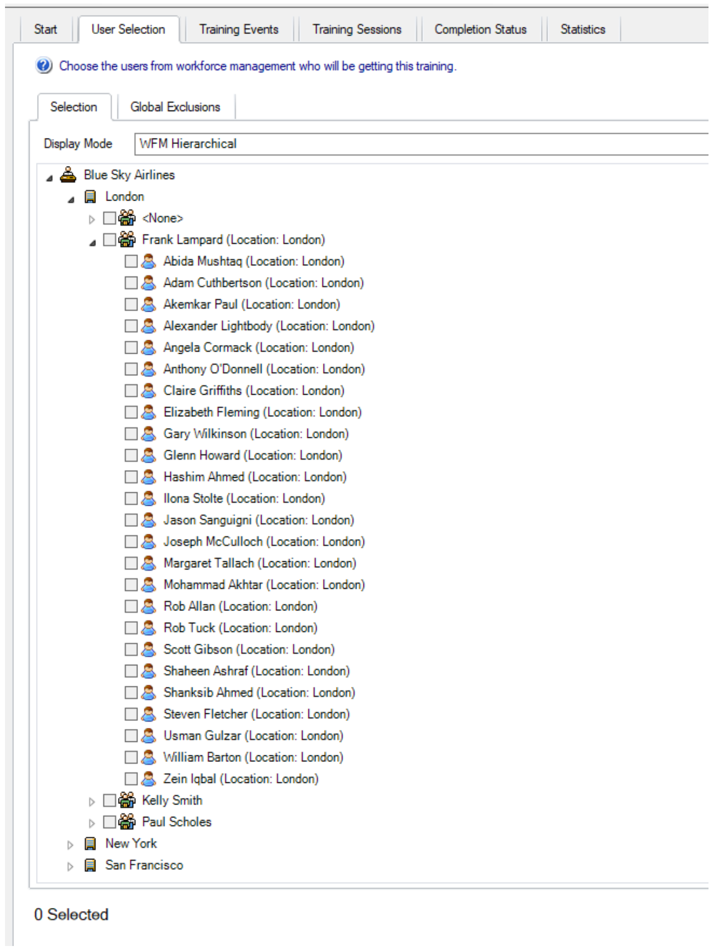



Figure 70: Selecting users

There is also the option to associate a Location with an individual if required.

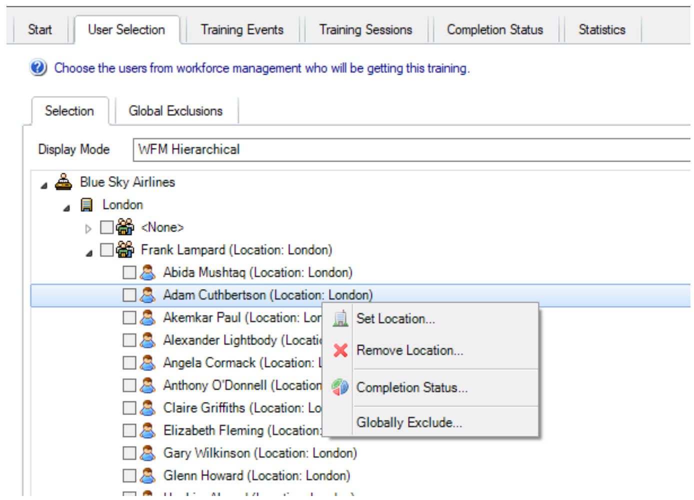



Figure 71: Associating a location with an individual

### 8.3.1 Choose

There are additional options available by clicking the **Choose** button. The **User Selection Filter** screen appears, as in the example at the bottom of the page.

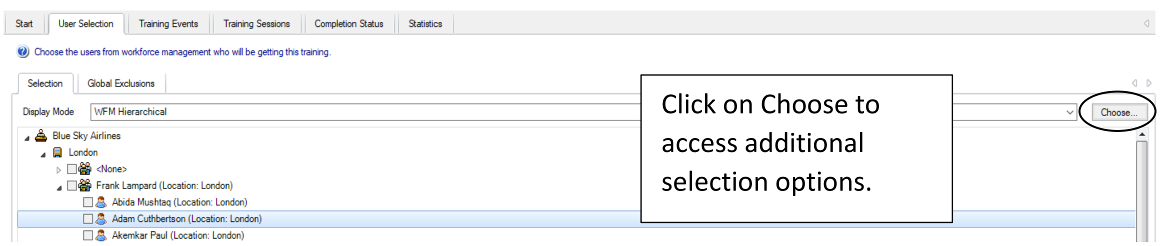



Figure 72: Filtering the user selection

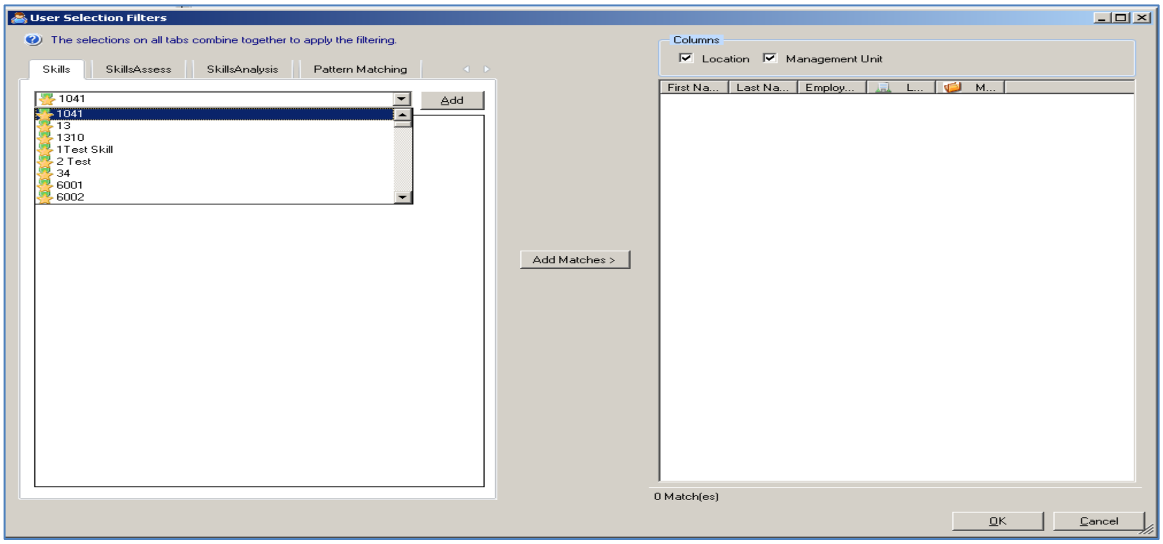



Figure 73: Filtering the user selection

Users can now be selected by the options available.

In this example users can be selected by Skill and level. Select the skill required and then click on **Add**.

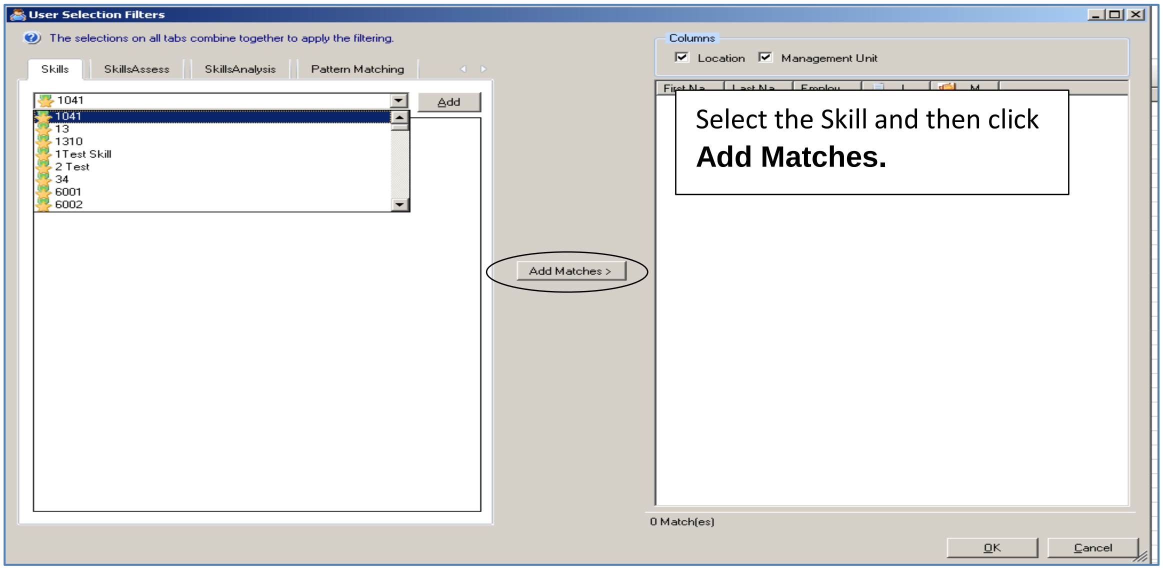



Figure 74: Filtering the user selection

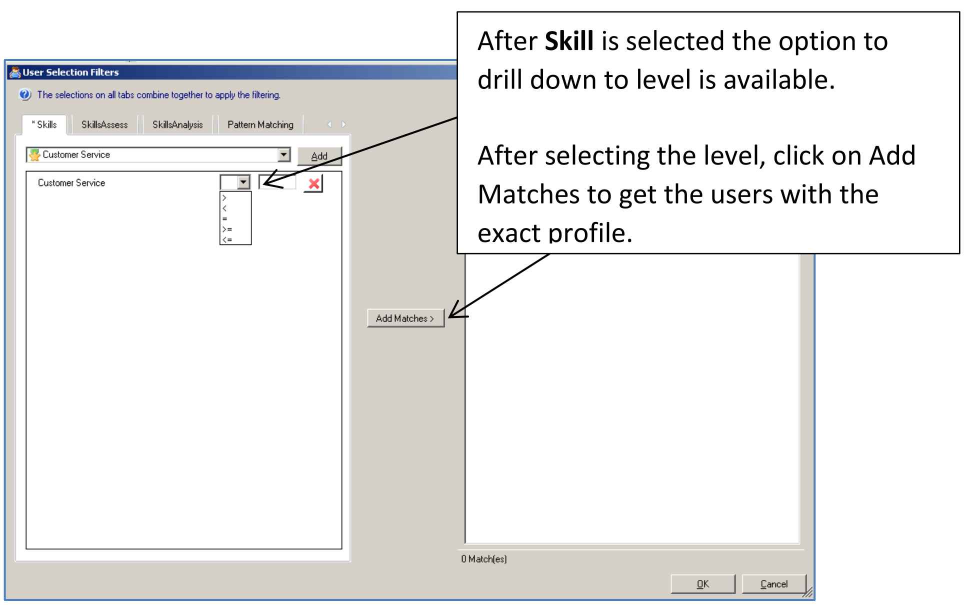


Figure 75: Filtering the user selection

Below is an example showing users in the right-hand pane who have the **Customer Service** skill in their profile.

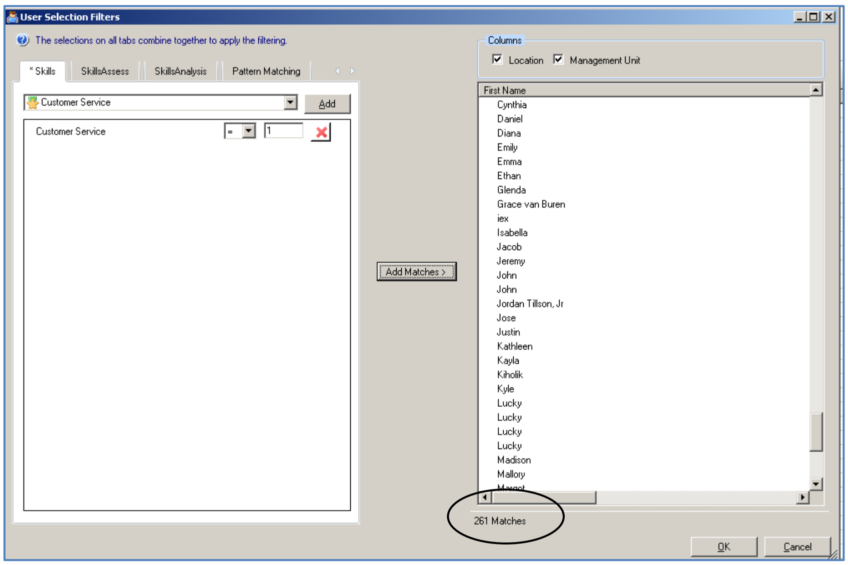



Figure 76: Filtering the user selection

Additional activities can be included within the **User Selection** list by selecting an additional Skill from the drop-down menu, removing the original selection first, and then clicking **Add Matches**. The **User Selection** window appears, with three options:

- **Add to existing** – add any agents that are not already in the user selection list.
- **Replace existing** – only show agents with the second activity in the user selection list.
- **Cancel** – cancel the selection and clear the user selection.

***This can be done as a combination across all of the user selection filter tabs.***

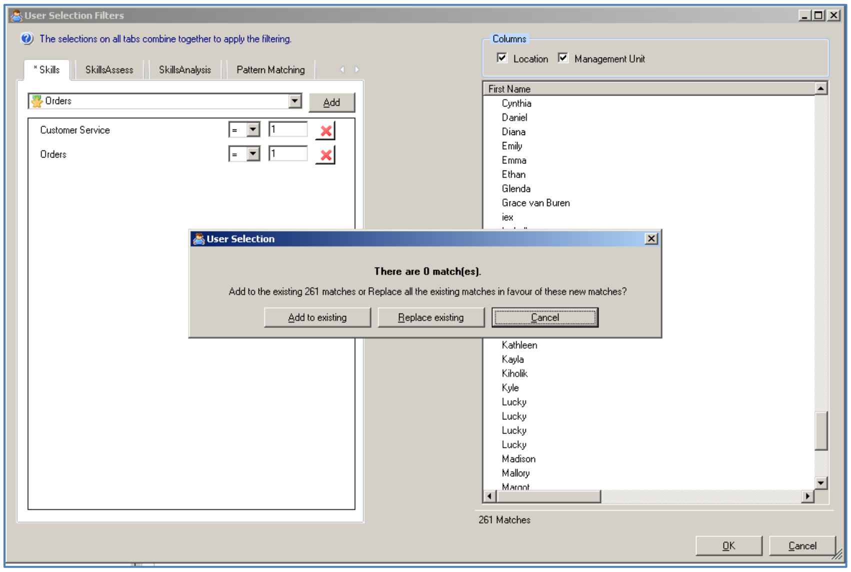



Figure 77: Filtering the user selection

When you click **OK** the users will be displayed in the user selection tree. See the example below.

### *8.3.1.1 Selecting Users for Training/Meetings by DNA Scores*

If Training Manager has been integrated with Performance DNA it is possible to select users for training/meetings based on their DNA scores. To do this. Select a meeting/training request and browse to the User Selection Tab. Click the right arrow button to the right of the set of tabs until the DNA tab is visible. Clicking on this tab allows for the specification of a strand and its strand parts within the drill down with a set of controls for setting the score range. Clicking the Add Matches button will then add all of the users who have the strand or strand part assigned to them and their score falls in the specified value range based on their most recent strand or strand part score.

Clicking OK will then add the users to the meeting/training request's user selection.

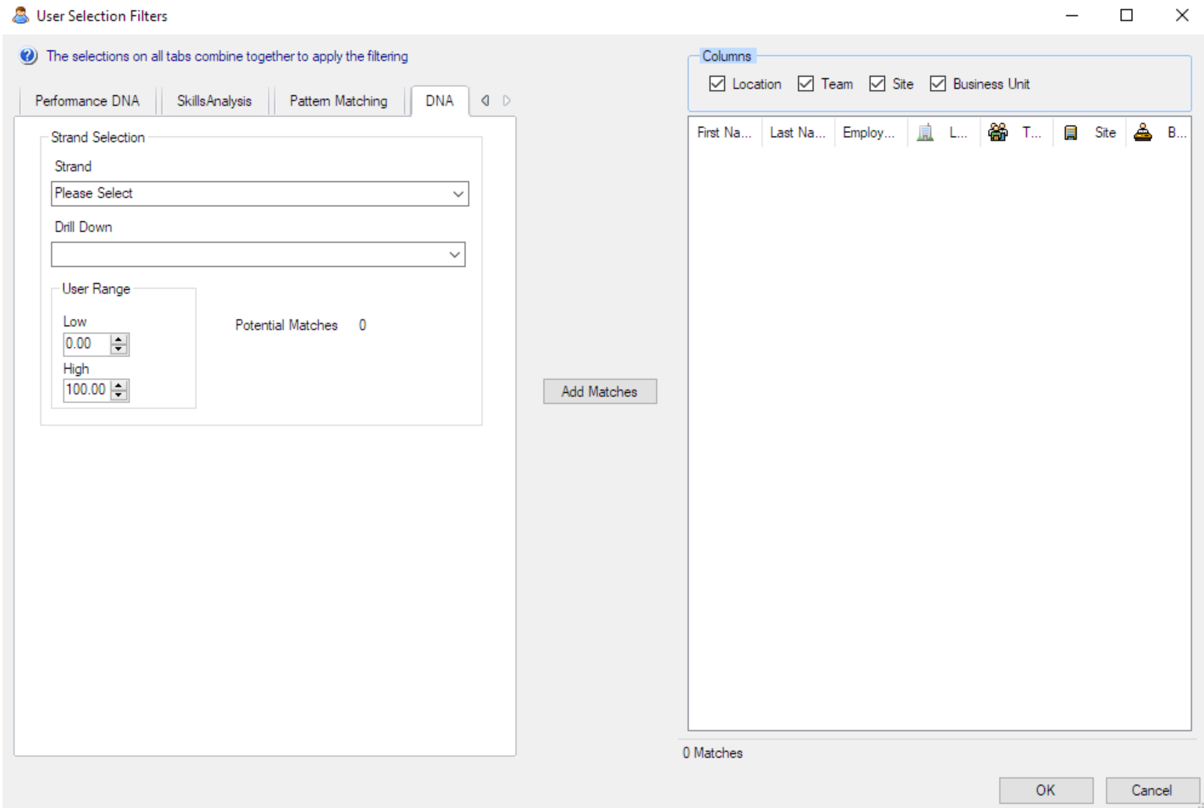



Figure 78: Choosing users by DNA score

Notes: Adding users from the DNA tab will result in the previous user selection being replaced by the users who matched the DNA score search.

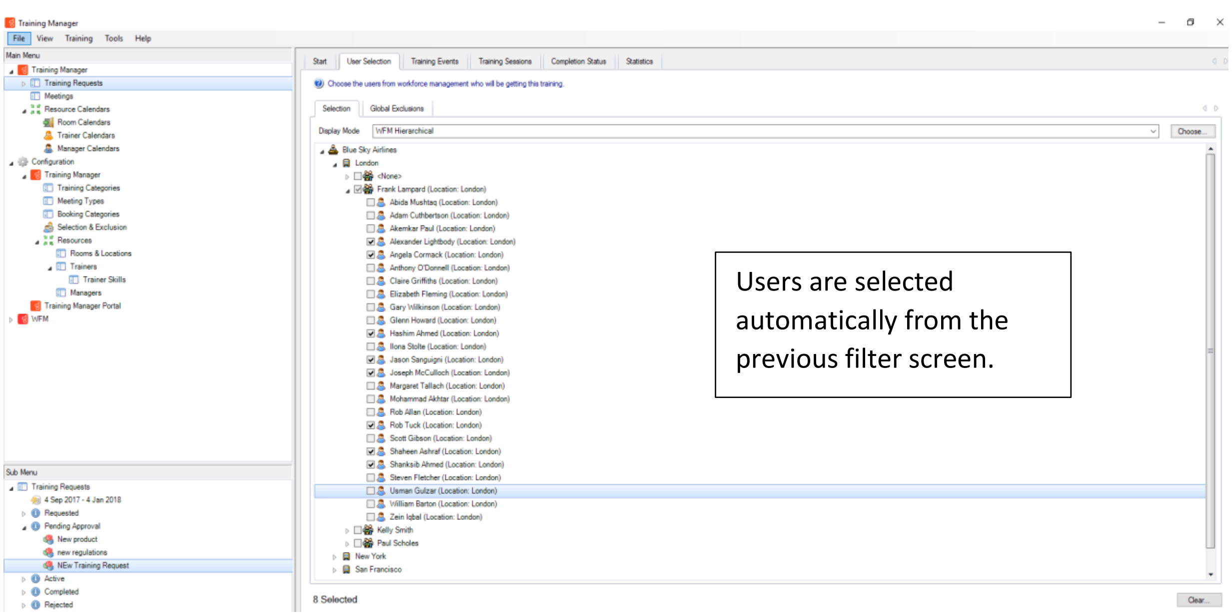


Figure 79: Display of selected users

There is also the option to remove or add any user to the **Global Exclusions** list.

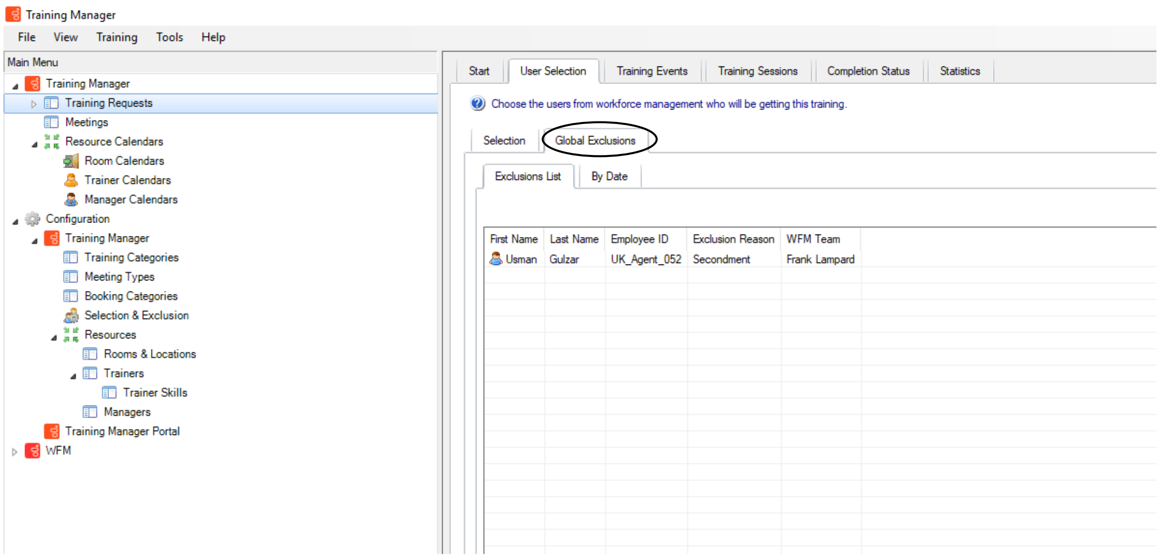



Figure 80: Managing the global exclusions list

### 8.3.1.2 Performance DNA

The Performance DNA option will only be available if Performance DNA is mapped across to Training Manager. This allows for the selection of users based on their assessment results at assessment or content level.

A list of assessments will be available for selection based on the date range.

The assessments can be expanded to view the associated modules to select from. In the example below, the **Hardware** module has been selected, and any agents who achieved results between 0% and 90% have been requested. Five users have been identified and are visible in the pane on the right. This allows training activity to be based on assessment results; therefore, only training based on knowledge or skill gaps will be scheduled.

#### *8.3.1.3 Skillsanalysis*

The option to select users based on the analytics area of Performance DNA is also available (providing that Performance DNA is integrated into Training Manager)

A list of the training sessions created in SkillsAnalysis will be visible and available for selection as per the example below.

#### *8.3.1.4 Pattern Matching*

This allows for keyword searching as in the example below.

Once agents have been identified and selected, update the agent count by clicking **Update Matches**. The individual agents will then be visible in the **User Selection** window.

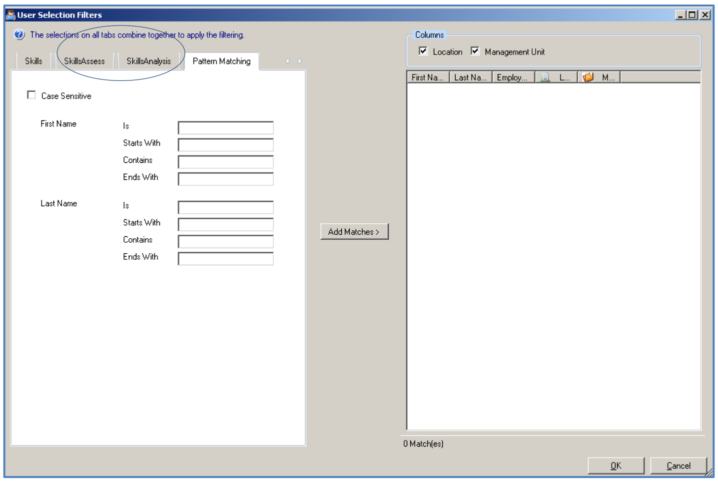



Figure 81: Using pattern matching to search for agents

Click **OK,** and then click **Apply** and move on to the next tab.

# 9 Training Events

This is where events are created for the training request. An event will be created for you automatically for each training request when you first access the Training Events tab. Right click on the training request and select New Event to create additional events. The training request name will appear automatically.

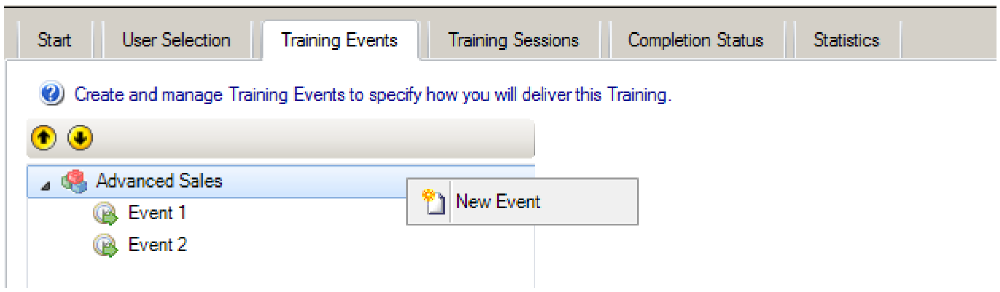



Figure 82: Creating an event for a training request

## 9.1 Creating a New Event

Once the new event icon has been selected the template will appear as per the example below. It can be renamed and a description can be included in the **Event Details** area:

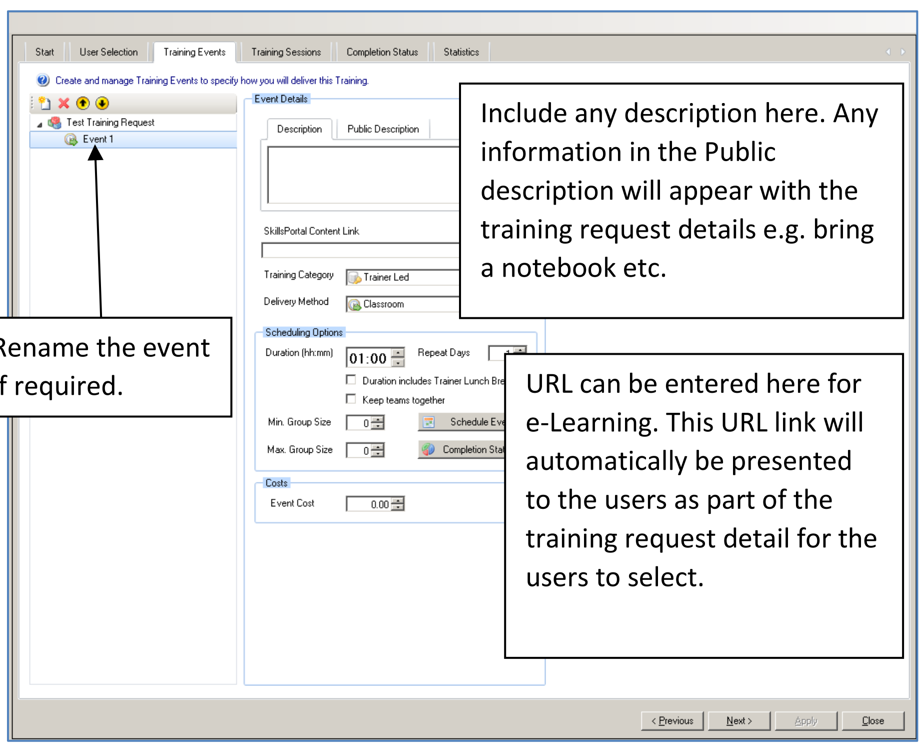



Figure 83: Creating a new training event

- **Description** – information entered here is only visible in Training Manager.
- **Public Description** – information entered here will be visible in the web portal and can be used to communicate any pre-attendance requirements to the delegates.

**Training Manager Portal Content Link** – a URL can be entered here that will allow a user direct access into the web page through their web portal view (this will depend on any internal firewall constraints).

**Training Category** – this is selected from a drop-down menu (the associated exception code and color will be published in WFM).

**Delivery Method** – this is selected from the drop-down menu; there are two methods available:

- Classroom – the agents will be scheduled in groups.
- E-Learning – the agents will be scheduled individually.
- Duration – this is the time duration of the training.
- Repeat Days – if this is a single day then keep this at 1. If the training is over consecutive days then amend this figure to the number of days e.g. 2

Duration includes Trainer Lunch Break – select this if the training will impact on the trainer lunch break requirements. If the training is for a full day then this will need to be selected as training cannot be scheduled to allow for the trainer to have a lunch outside of any training.

Keep teams together – select this if the teams are to be scheduled together with no other team members included in the sessions.

Min. Group Size – the minimum number of users to be scheduled.

Max. Group Size – the maximum number of users to be scheduled.

Enter the course duration. **Repeat Days** is selected if the training is for more than 1 consecutive day.

Select **Completion Status** to view the agents who were selected in the **user selection.**

Selecting **Duration Includes Trainer Lunch Break** will exclude the trainer lunch requirements as the trainer will manage lunch as part of their training session. If this is not selected then the application will try and schedule training around the trainers lunch break requirement which will be impossible if the training is set up as an all-day event.

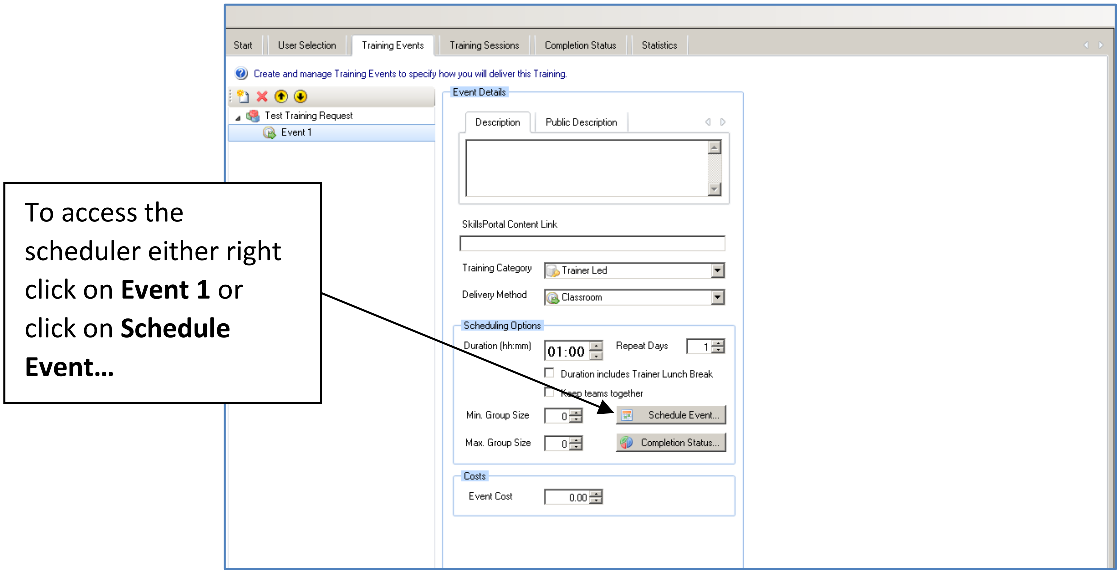



**Figure 84: Creating a new training event**

Once all of the details are entered, select **Schedule Event** or right-click the event name to open the Scheduler.

## 9.2 Schedule Event

There are five tabs in the **Schedule Event** section:

- Resources
- Interruptible Activities
- Scheduling Options
- Optimized Search
- Manual Search

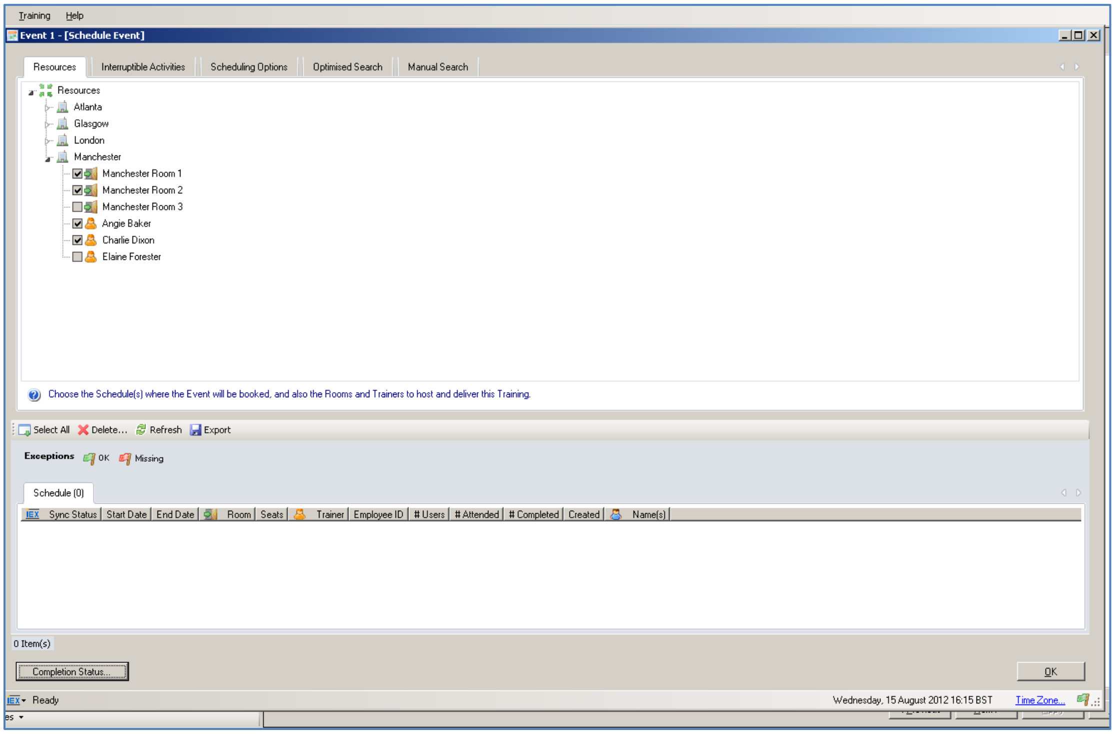



Figure 85: Scheduling an event: resources

## 9.3 Resources

This is where the rooms and /or trainers are selected as part of the training request.

Expand the location(s) for the training, and any associated rooms and trainers are then visible for selecting.

Select the room(s) and trainer(s) by clicking the box to the left.

If no room(s) and / or trainer(s) are required, nothing should be selected.

If there is only a requirement for reserving rooms, right-click the location name and select **Reserve Places**.

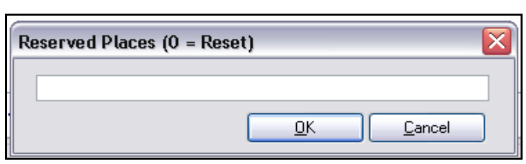



Figure 86: Reserving places

Enter the number of places and click **OK**. This will show against the location name.

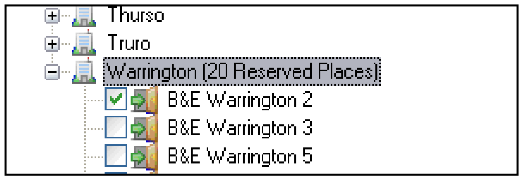



Figure 87: Display of reserved places

Select the preferred rooms by checking the box to the left of the room name. Training Manager will reserve room(s) up to the number of places requested as part of the scheduling process. Remember to select the rooms to be reserved and the trainers, if required.

To remove **Reserved Places,** enter **0** to reset.

Training Manager can create any combination of room, trainer and agent. The following pages will demonstrate some of the different training scenario options available.

### 9.3.1 Scheduling a Combination of Trainer, Room and Agent

Where a trainer and room are required as part of the agent scheduling process, first identify the locations that are affected and then expand to view the **Rooms** and **Trainers** that are associated with them.

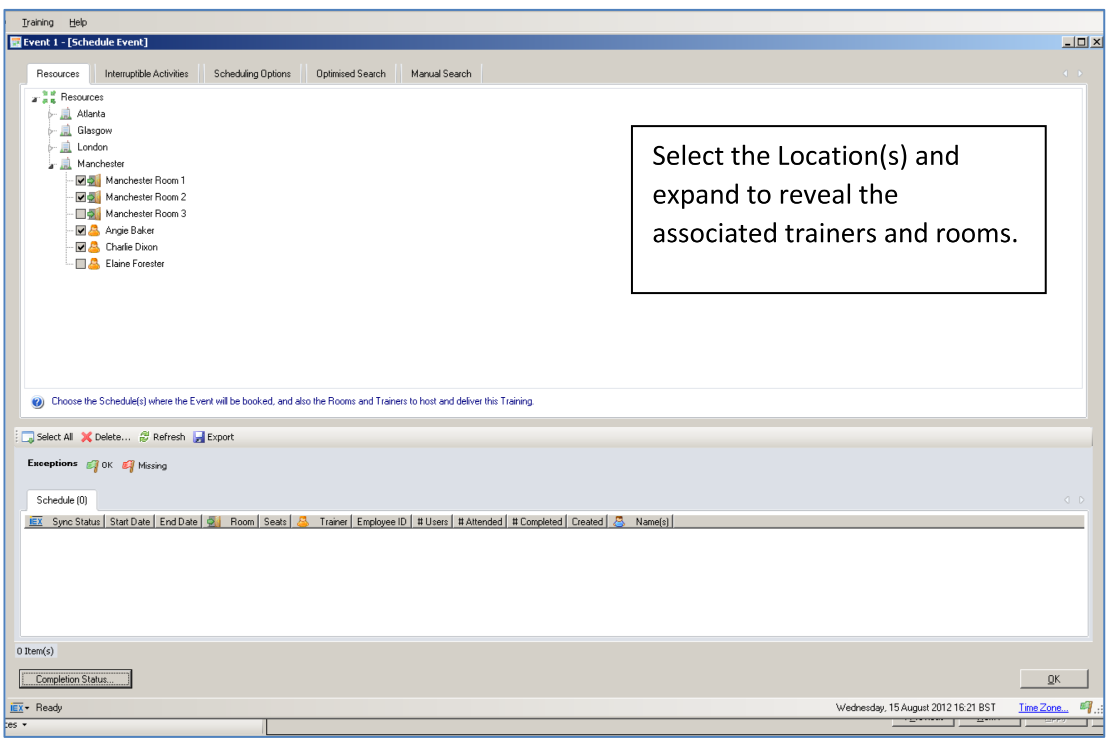



Figure 88: Scheduling a combination of trainer, room and agent

The room(s) and trainer(s) required are selected by checking the box to the left.

Once the room(s) and trainer(s) have been selected, click the **Interruptible Activities** tab to confirm/select which activities are interruptible.

If **Trainer Endpoints** are configured from **Skills Management Portal > System Settings**, then the trainer schedules/diaries will be checked in all systems configured.

### 9.3.2 Interruptible Activities

Activities will automatically be selected as interruptible in Training Manager. Activity Sets, Meals, Breaks, Marked Time and Exceptions are manually selected.

If a new Activity has been created, then it will not be retrospectively selected as interruptible. If this needs to be included in the training request it will have to be manually selected.

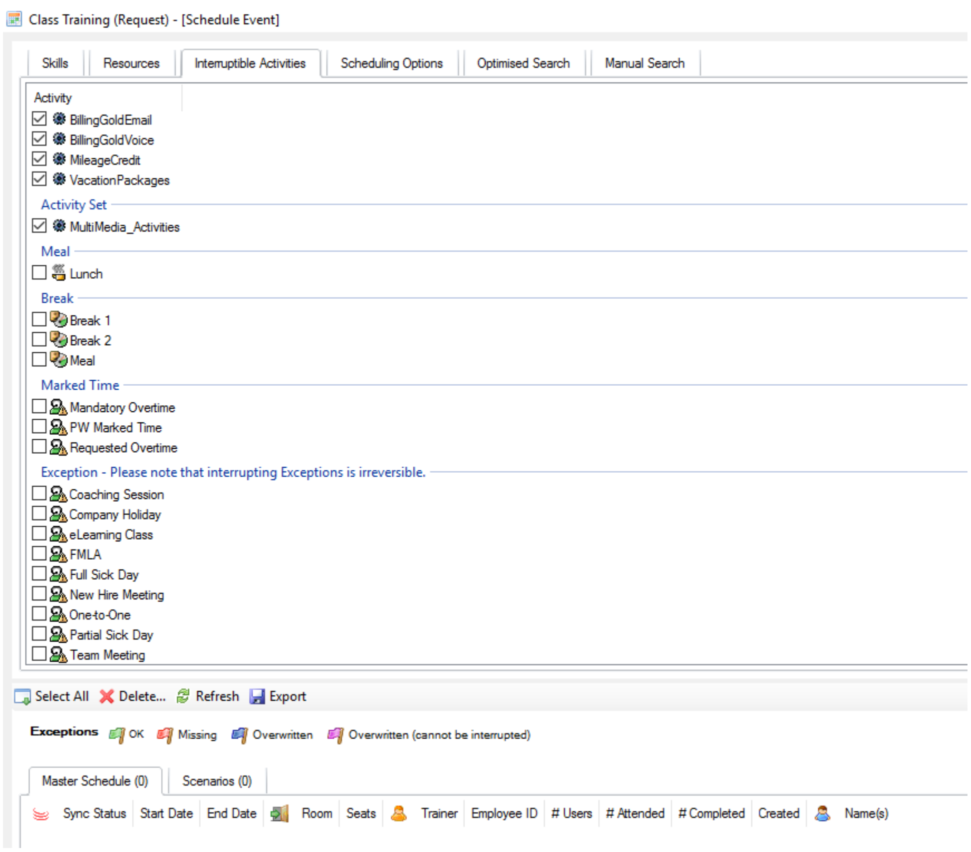



Figure 89: Interruptible activities

#### *9.3.2.1 Marked Time and Time Off Overlay Exceptions*

When a scheduled Training slot is over written within WFM with either a Time off type or Marked Time the status flag with change colour. The flag will be purple to show that the slot has been overwritten by Time Off and blue for Marked Time.

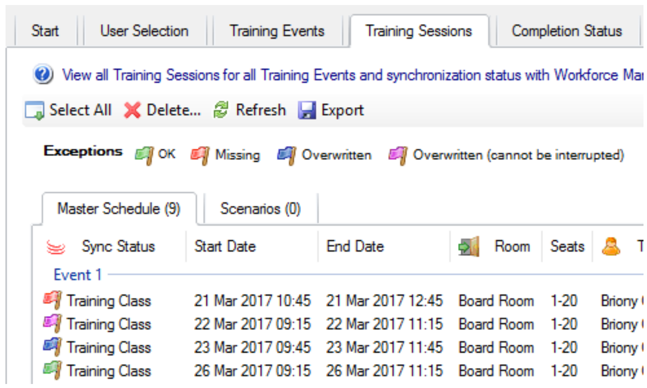



Figure 90: Overwritten slots

### 9.3.3 Scheduling a Combination of Room and Trainer Only

To create a training schedule for room(s) and trainer(s) only, for example, where there is a new intake of agents who have not commenced employment and are therefore not scheduled in WFM, Training Manager still must be configured with all of the relevant information. This excludes the User Selection up to the Scheduler stage, as in the example below.

To reserve the correct number of rooms, right-click the required location. A **Reserve Places** option appears.

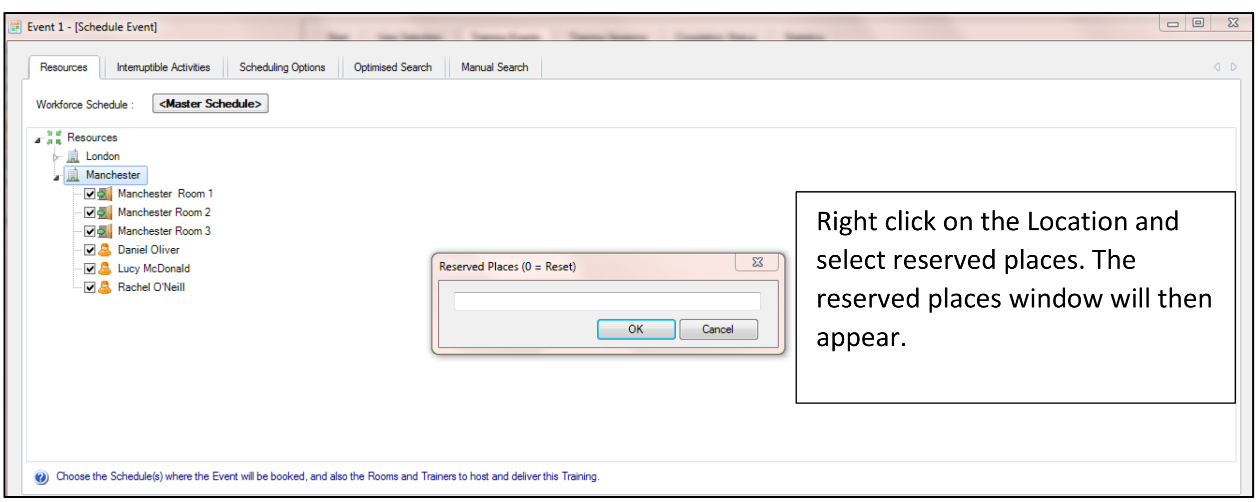



Figure 91: Scheduling a combination of room and trainer only

After selecting **Reserve Places**, enter the number of agents expected and click **OK**.

This identifies the number of places Training Manager needs to reserve for training.

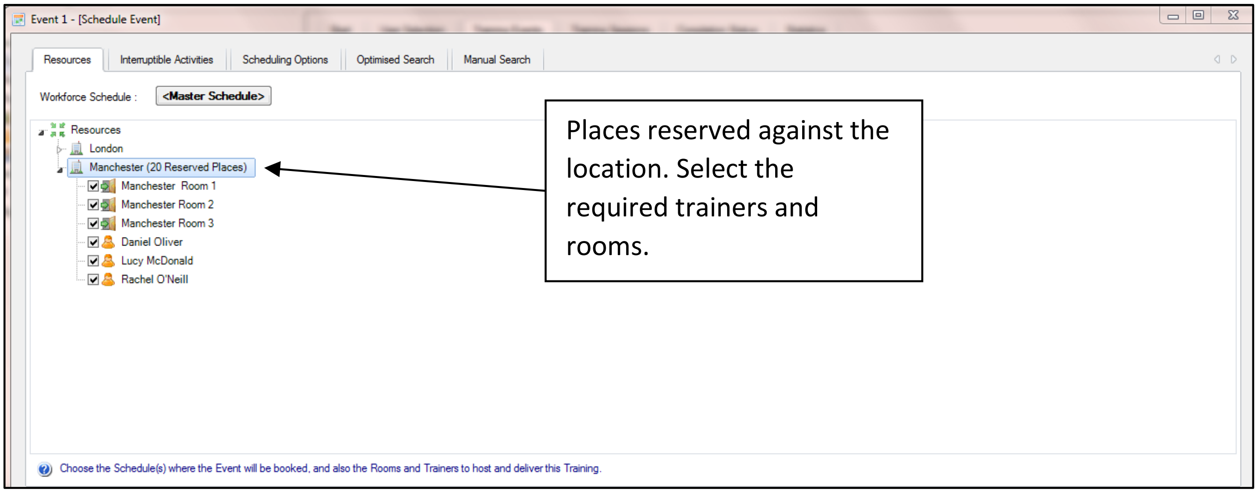



Figure 92: Display of reserved places

Once the resources have been identified, click the **Interruptible Activities** Tab. Select any activities that can be interrupted by Training Manager.

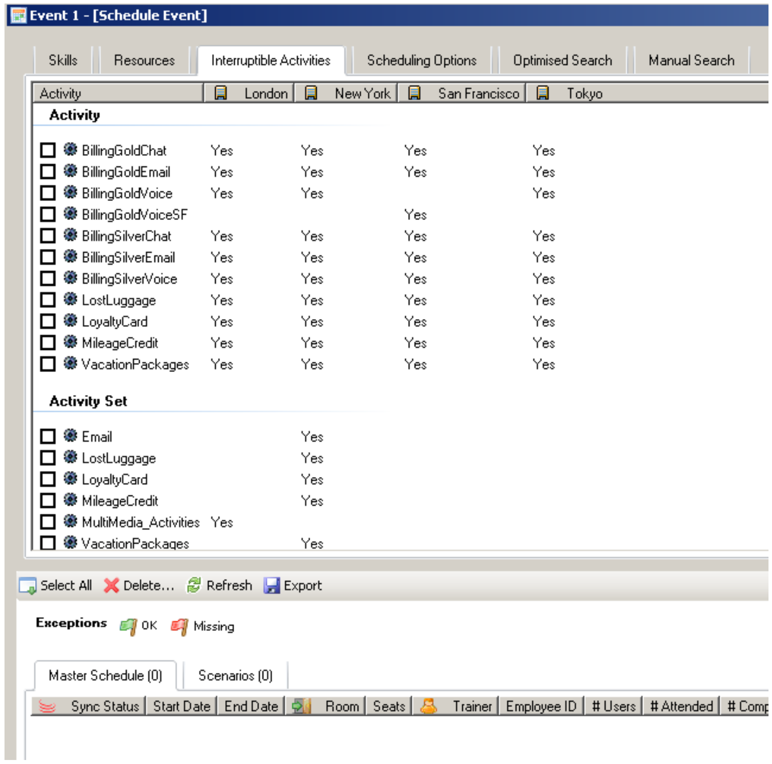



Figure 93: Setting interruptible activities

### 9.3.4 Agent Only Scheduling

To schedule agents only, create the training request using the template wizard as usual, selecting the required agents in the **User Selection** window. Ignore **Resources** and continue from the **Optimised Search** tab.

## 9.4 Scheduling Options

The scheduling options tab allows for any amendments to be made before scheduling the training activity.

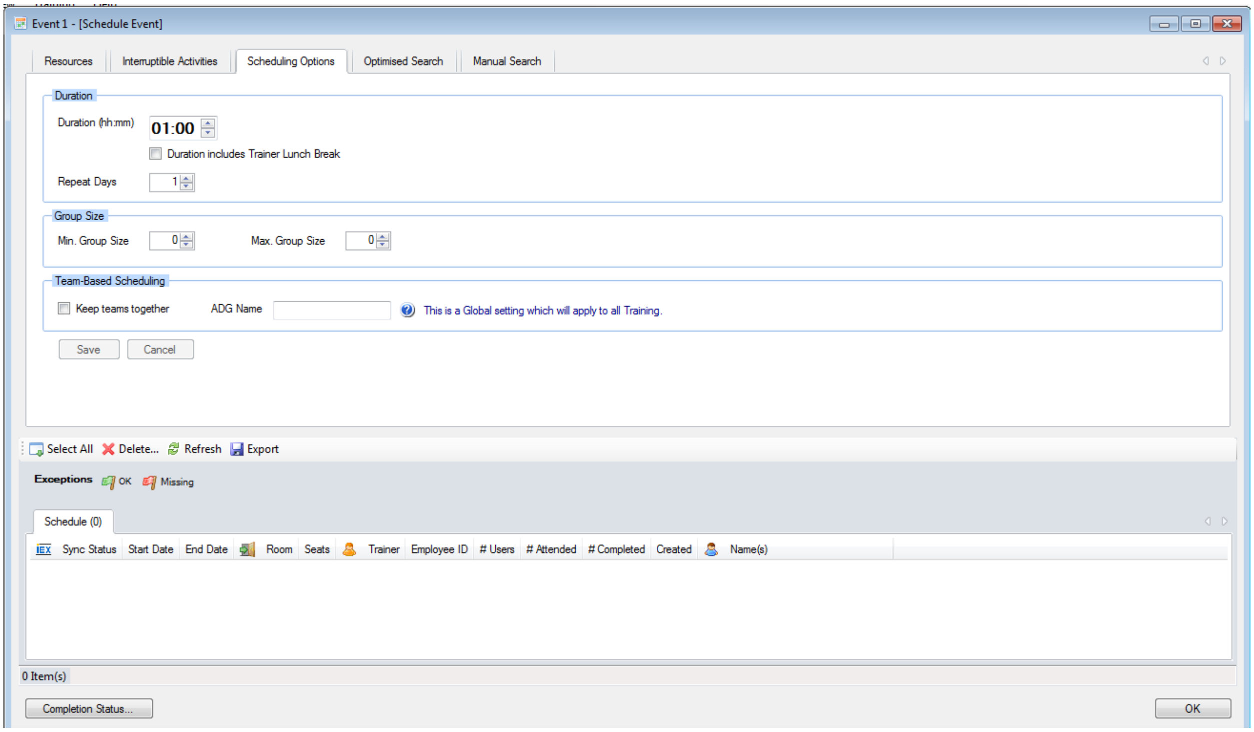



Figure 94: Setting scheduling options

## 9.5 Optimised Search

The Optimisation Search Template (see the example below) uses business constraints when scheduling training activity.

It is divided into five sections:

1. Training Window
2. Time & Travel Constraints
3. Performance Constraints
4. Booking Strategy
5. Training Sessions

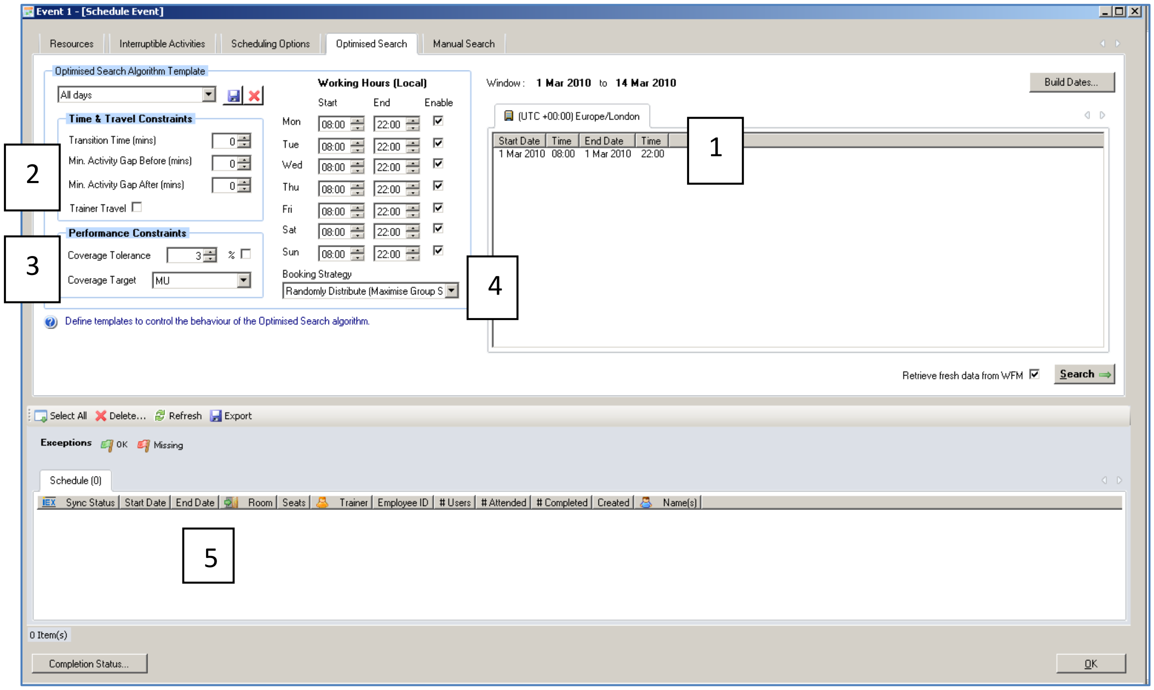


Figure 95: Optimized search options

## 9.6 Training Window

The dates in the Training Window are brought over from the date range entered in the **Start** tab of the **Training Request**. The training times are built from the **Working Hours** start and end dates and from the enable days.

Different templates can be created by changing the **From** and **To** times, and selecting or deselecting any days between Monday to Sunday. Information can also be changed within **Time & Travel Constraints** and **Performance Constraints** and saved as a new template by clicking the **Save** button. Once the template is saved, the option to rename it appears, which then creates a new template. Once the template has been saved it will be available for selection in the drop-down menu.

Once the training window has been configured with the required days and times, click the **Build Dates** button. This will create the training window slots based on the dates and time constraints.

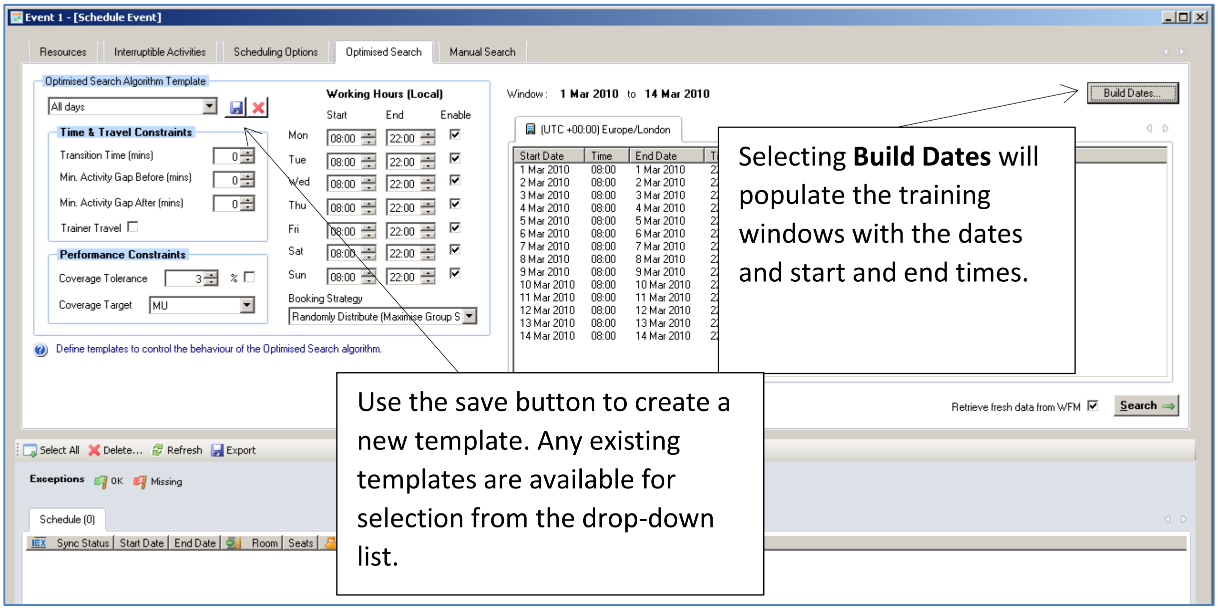



Figure 96: Creating optimised search algorithm templates

### 9.6.1 Excluding Training Dates

To exclude specific dates from scheduling training activity, right-click the specific date within the training window and select **Remove**.

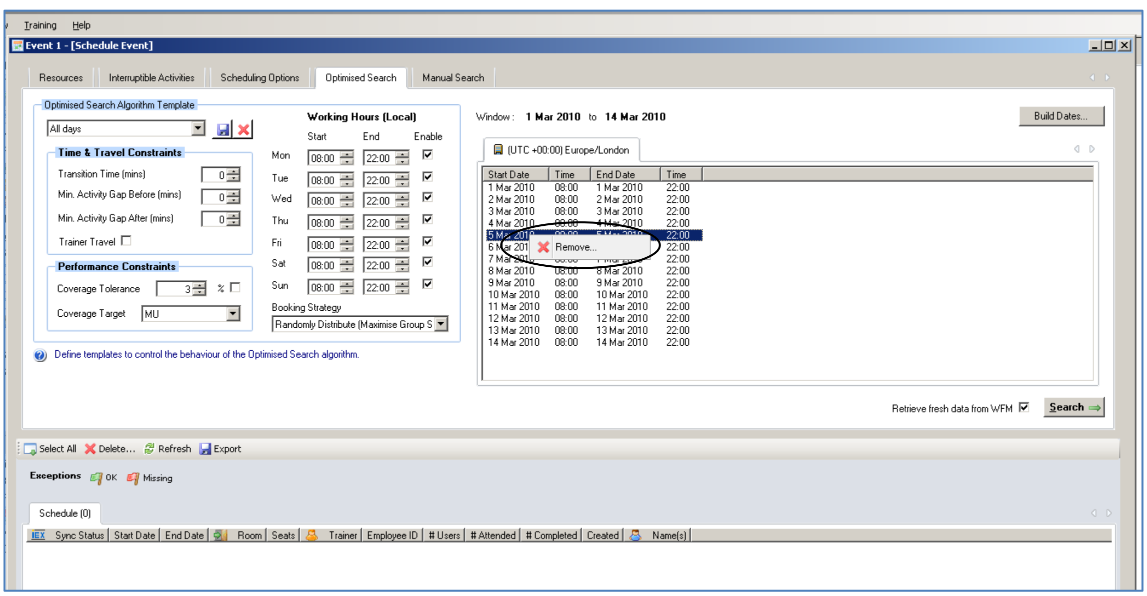


Figure 97: Excluding training dates

## 9.8 Time and Travel Constraints

This relates only to the room and trainer activity.

### 9.8.1 Transition Time (minutes)

This allows the application to build in a natural break for the trainer and the room between the training sessions.

In the example on the previous page, 15 minutes has been entered against transition time. Training Manager will build in a natural 15 minute gap between the previous training session and the next, for both the room and the trainer if this resource has been selected as part of the scheduling process. Training Manager will also look to see if it can schedule the transition gap of 15 minutes at the start or end of the shift so as to minimise non-productive time.

### 9.8.2 Minimum Activity Gap Before

The **Minimum Activity Gap Before** specifies a minimum amount of time that an agent has to be on the phones before they can have a training session scheduled if the training session is booked after the user starts their work day (this will not affect a training session that has been scheduled for the beginning of an agent's work day). This could be at the start of the day or after some other off-phone activity, for example, breaks.

### 9.8.3 Minimum Activity Gap After

This is similar to **Minimum Activity Gap After** but specifies the minimum amount of time an agent has to be on the phones after a training session has finished. For example, it would not be ideal if the session finished 10 minutes before the end of the agent's shift, as the agent may not sign back on the phones, which would affect their adherence.

### 9.8.4 Trainer Travel

This option is selected when non-home trainers are selected to be used as part of the training resource. It is recommended that this is not selected in the first instance in order to prioritize home-location trainers first; you can then re-run the scheduler to use trainers that have to travel.

## 9.9 Performance Constraints

### 9.9.1 Coverage Tolerance

This is the difference between staffing required (calculated) and the scheduled open for the duration of the training session, so how much tolerance can be given for scheduling the training.

The application looks at the required staffing based on forecast service level and the scheduled open, so actual scheduled against required. The coverage tolerance is the difference between the staffing you have working (scheduled open) and what is required (required).

For example, if the required number of agents is 100 across the duration of the training, and the scheduled open is 90, if the coverage tolerance was -20 only 10 would be selected, as the staffing is already 10 short. Training Manager would not schedule any training activity if by doing so the coverage would then drop below the -20 requirement.

### 9.9.2 Coverage Target

Use the drop-down box to select a Coverage Target, e.g. Site (Forecast), Site (Required), Activity (Forecast) or Activity (Required).

### 9.9.3 Retrieve Fresh Data from WFM

This can be left as selected, as Training Manager will retrieve the most up-to-date information from WFM to start scheduling training activity.

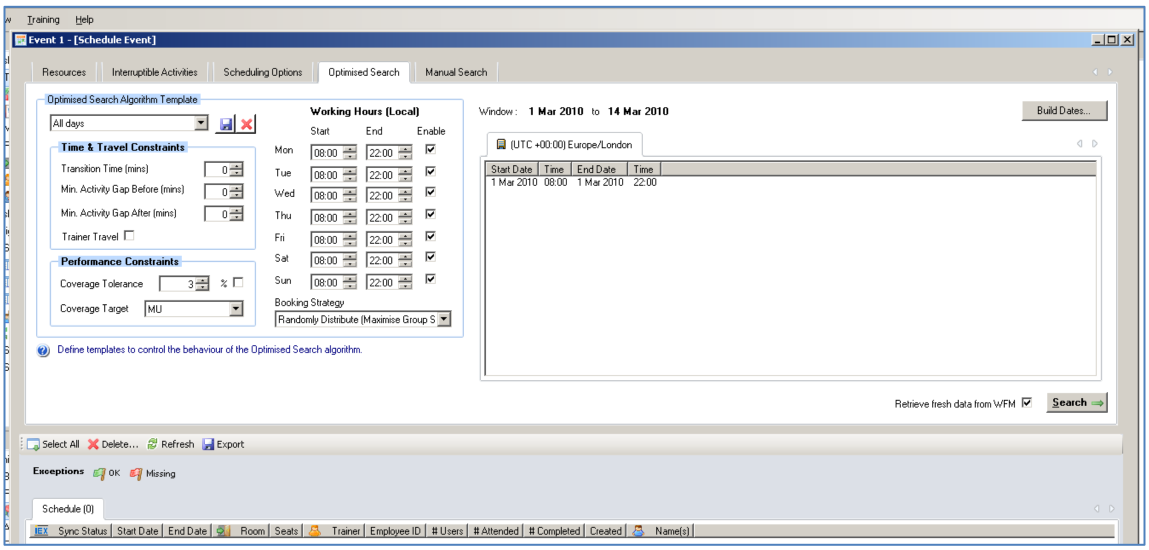


Figure 98: Default retrieval of fresh data from WFM

## 9.10 Booking Strategy

Booking Strategy gives the user the option to specify whether the training requests should be front loaded, randomly distributed, back loaded together with the option to maximize group size, or scheduled to minimise coverage disruption.

By selecting **Front Load** or **Back Load**, Training Manager will try to schedule all of the training sessions at the front or the back of the training window, while taking into account the performance constraints, as in the example on the next page.

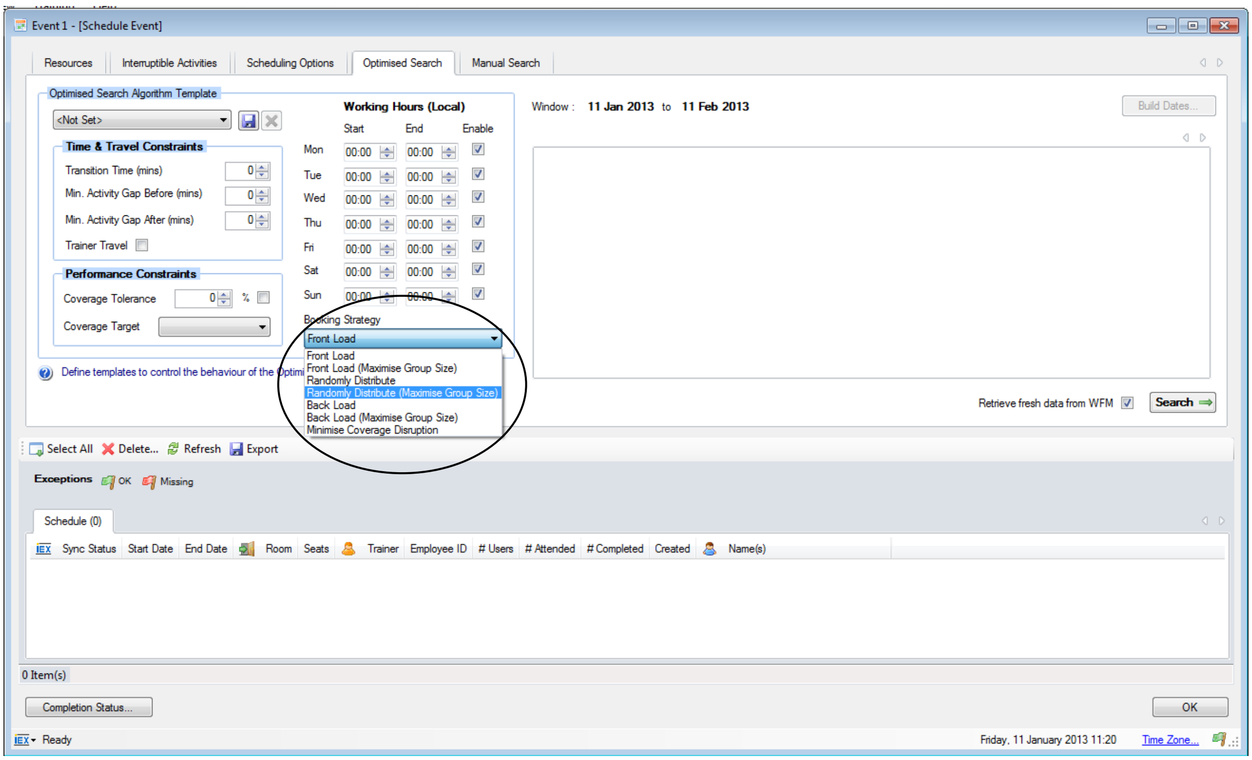



Figure 99: Selecting a booking strategy

Select **Randomly Distribute** from the drop-down menu under **Booking Strategies** and Training Manager will try to schedule the training activity across the training window, taking into account the performance constraints, as in the example on the next page.

The **Minimise Coverage Disruption** strategy will cause Training Manager to prioritise potential booking slots that have the biggest difference between coverage and the WFM forecast, i.e.it will maximise the ‘headroom’ between the actual staffing level and the required level according to the WFM system.

Once everything has been entered, update the Optimization Search Algorithm Template by clicking the **Save** button. You will have the option to either save the template with the same name, or give the template a new name, which will appear in the drop-down menu as a separate template for selection.

Click **Search** to retrieve fresh data from WFM.

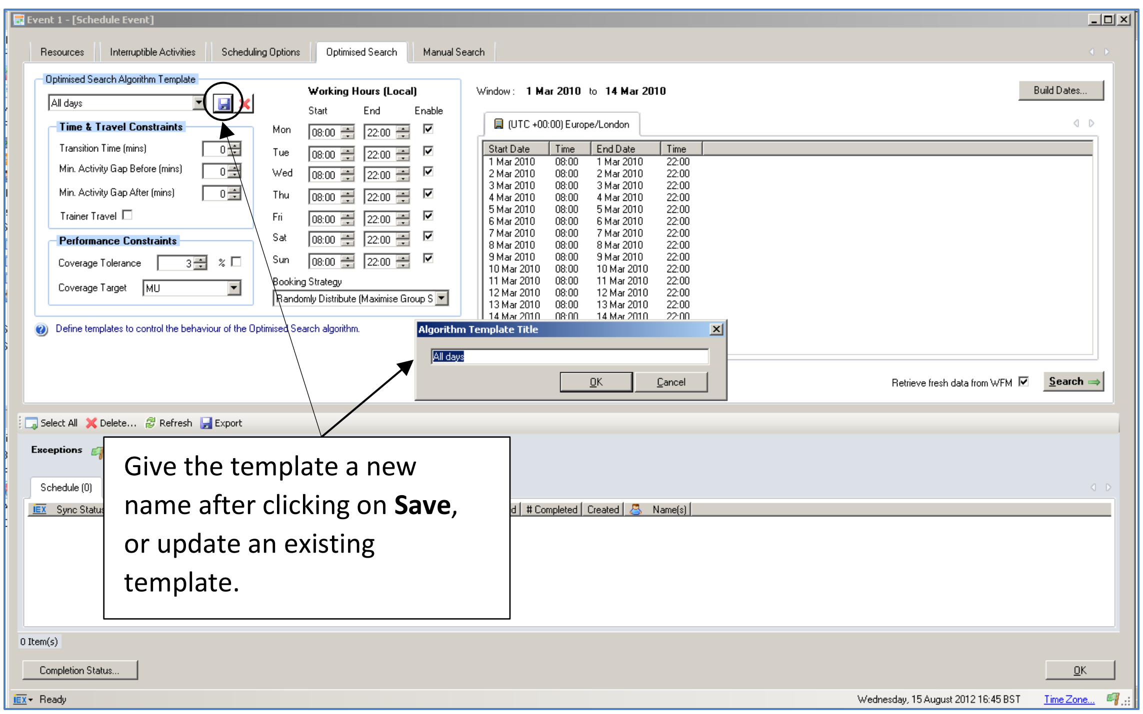



Figure 100: Saving an optimization search algorithm template

Training Manager is retrieving information from WFM, and information about what the application is doing will appear at the bottom of the window.

The option is also available to cancel at any time during the scheduling process. Refresh the screen during the scheduling process will update any training sessions created or after cancelling to ensure that there were no training sessions created prior to cancelling.

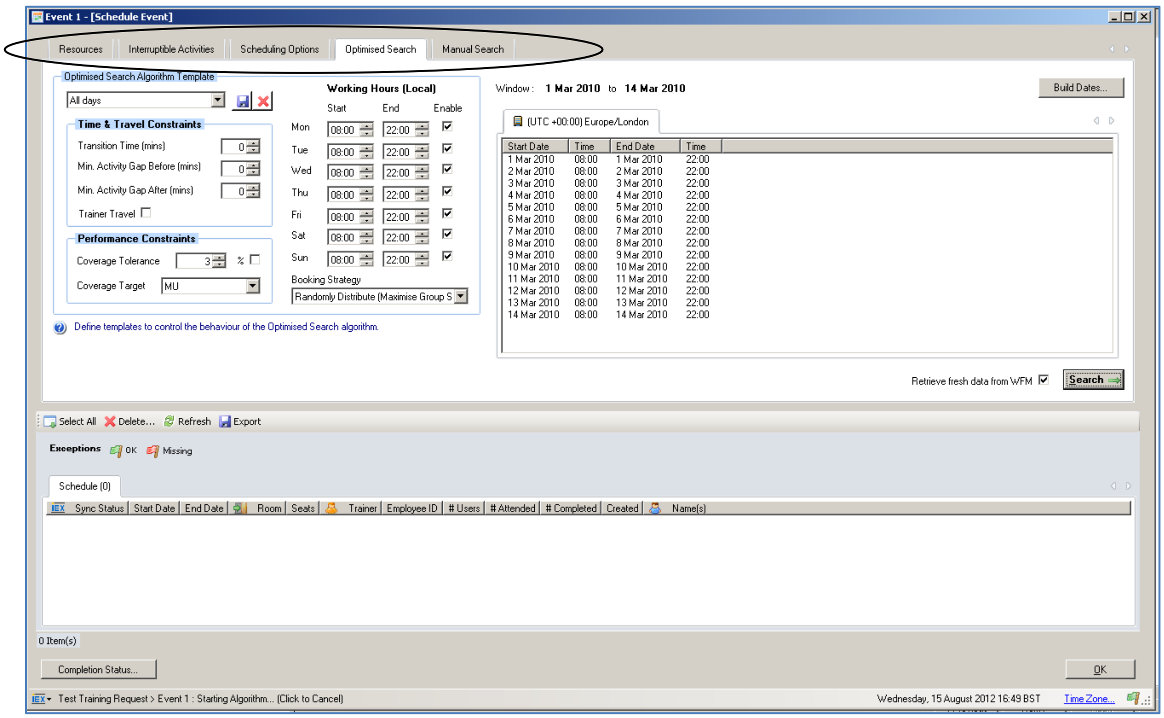



Figure 101: Progress status

Notification that Training Manager has finished will be given at the bottom of the screen.

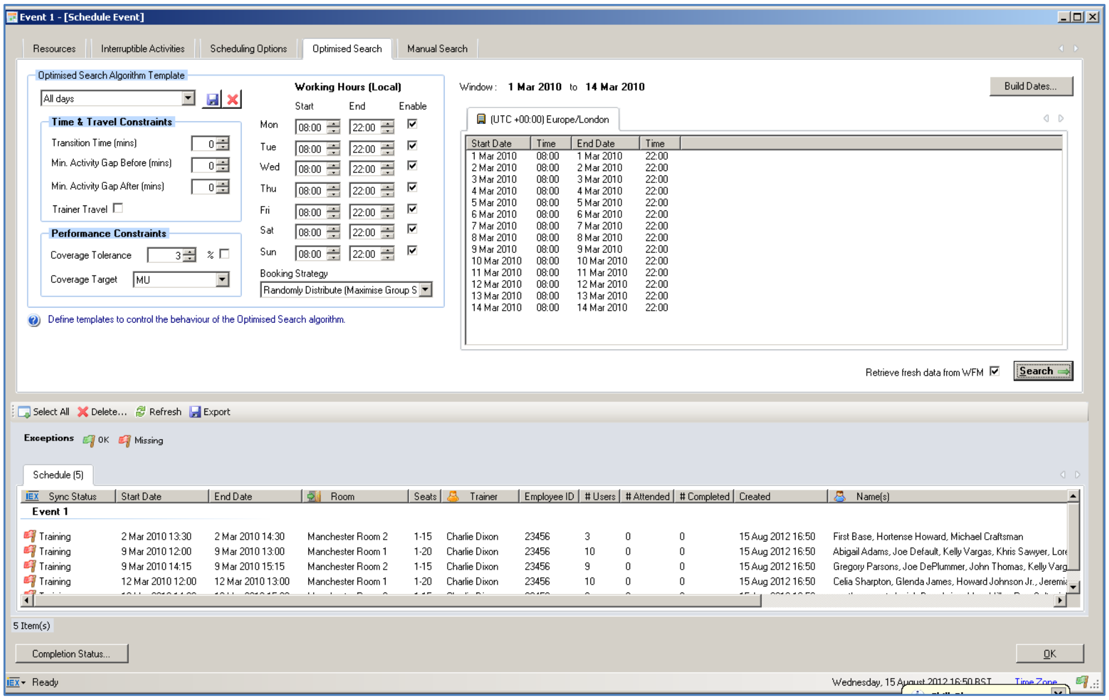


**Figure 102: Notification of completed search**

## 9.11 Training Sessions

Once completed, the training sessions are visible in the **Training Sessions** window, and the red flag to the left indicates that the training has been created in Training Manager but has not been committed to WFM.

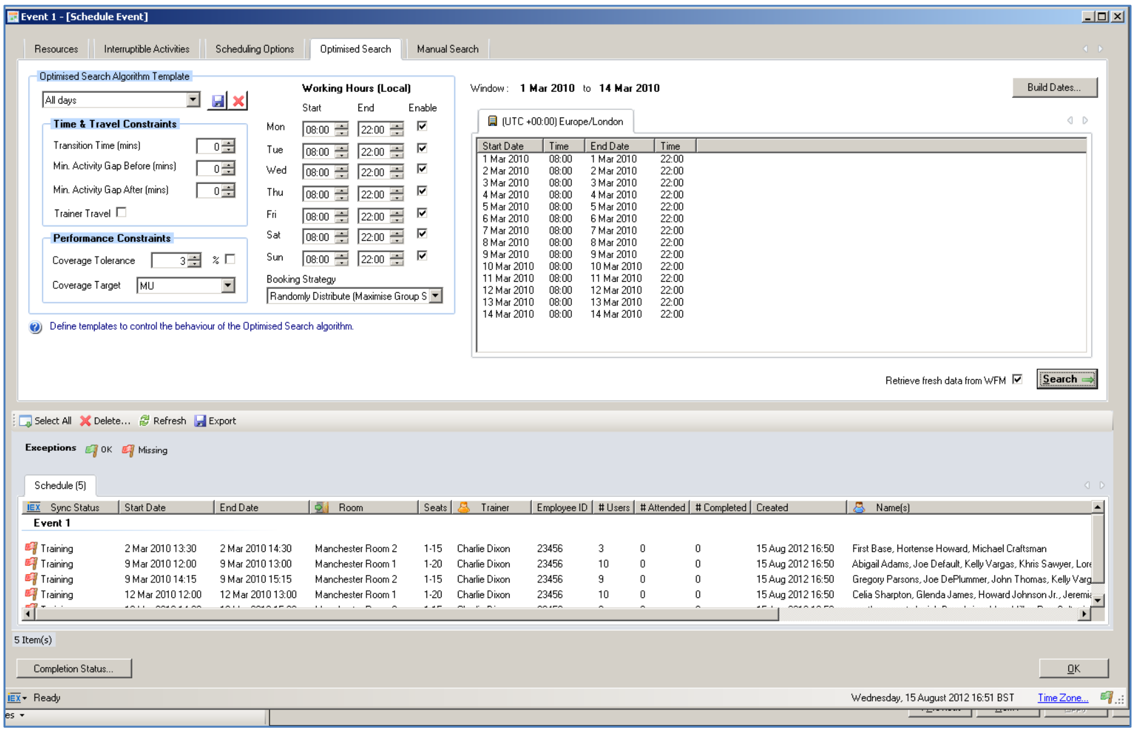


Figure 103: Display of search results

A breakdown of the information in the **Training Sessions** window is as follows:

**Start Date** – identifies the date and time that Training Manager has scheduled the session.

**End Date** – identifies the date and time that the session is scheduled to end.

**Room –** the room scheduled to hold the training. Training Manager will have looked at the room availability and facilities, such as the minimum and maximum number the room can hold for training.

**Seats –** the capacity of the room.

**Trainer** – The scheduled trainer. Training Manager will have checked the trainers' calendar to make sure that they are available and can train in the required location.

**EmployeeID** – the trainer's Employee ID.

**#Users** – the number of agents who have been identified from their shifts in WFM and are available.

**#Attended** – attendance is updated through the register by the trainer from their web portal view.

**#Completed** – as per Attended.

**Created** – the date and the time that the training sessions were created.

**Name(s)** – the names of the delegates.

**Completion Status** – selecting this will present the status of all agents selected for training, as in the example on the next page.

To view any additional information select the **Completion Status Report** which will include the following information:

- Location
- Team
- Site
- Business Unit

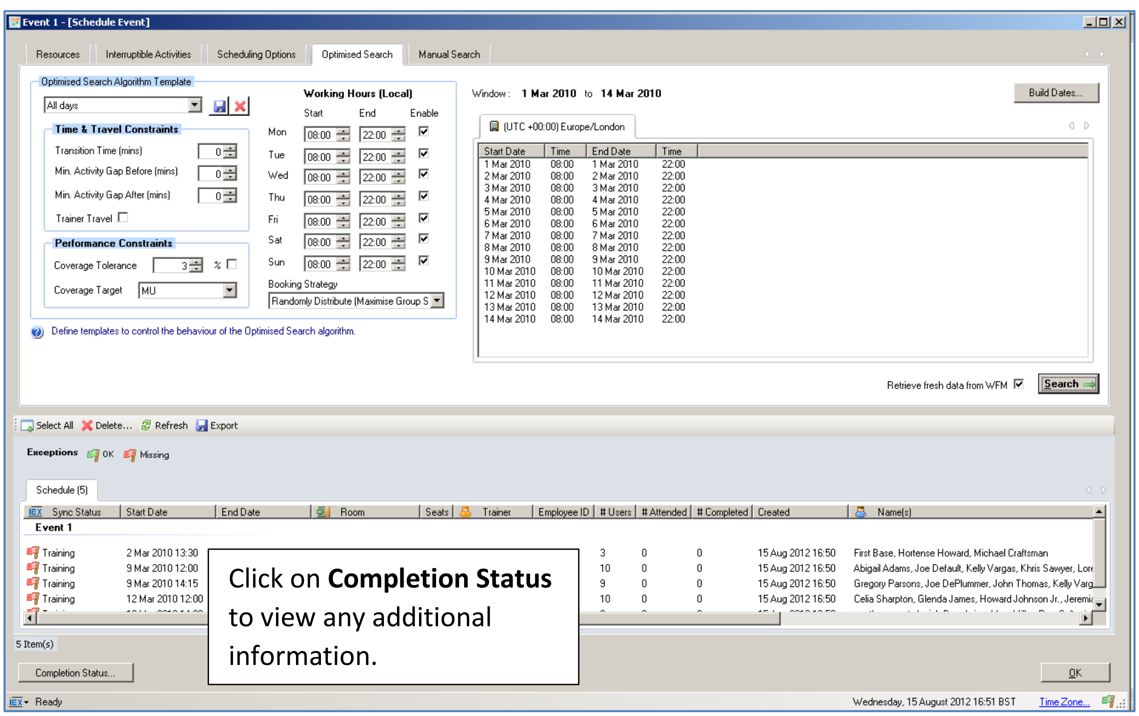



Figure 104: Viewing additional information via the completion status report

See the example below.

A gauge has also been included which allows you to view how complete the training event is. There is an export option in the bottom right-hand corner where you can export the information into Excel.

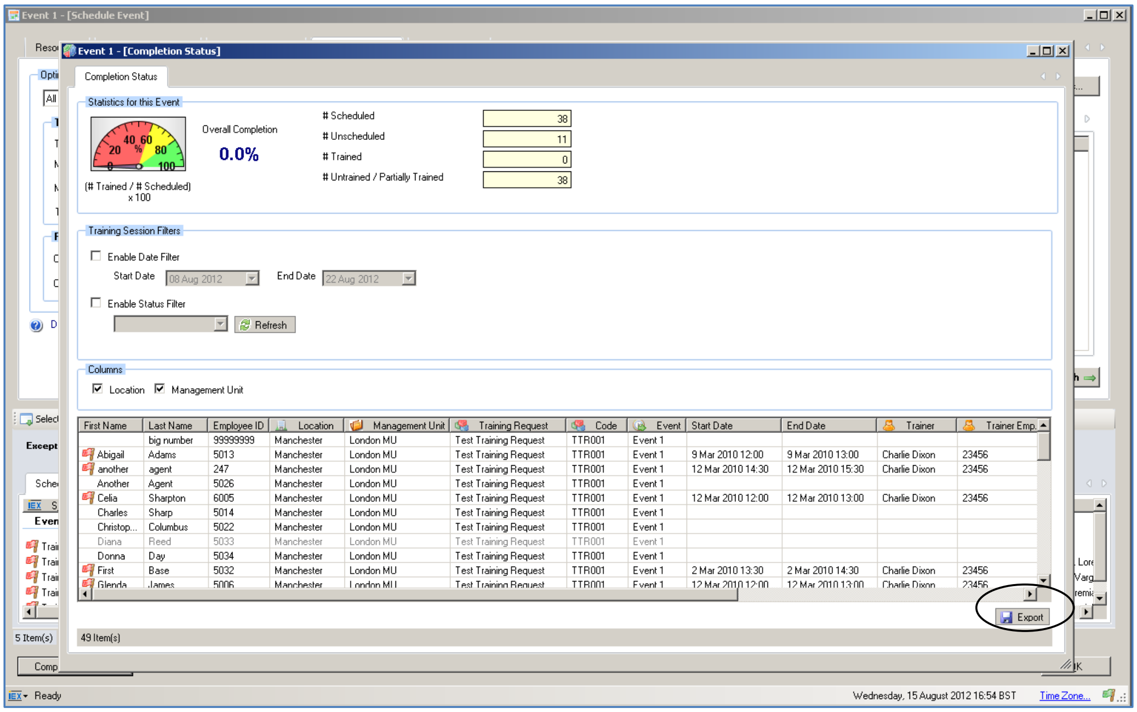


**Figure 105: Exporting results to an Excel spreadsheet**

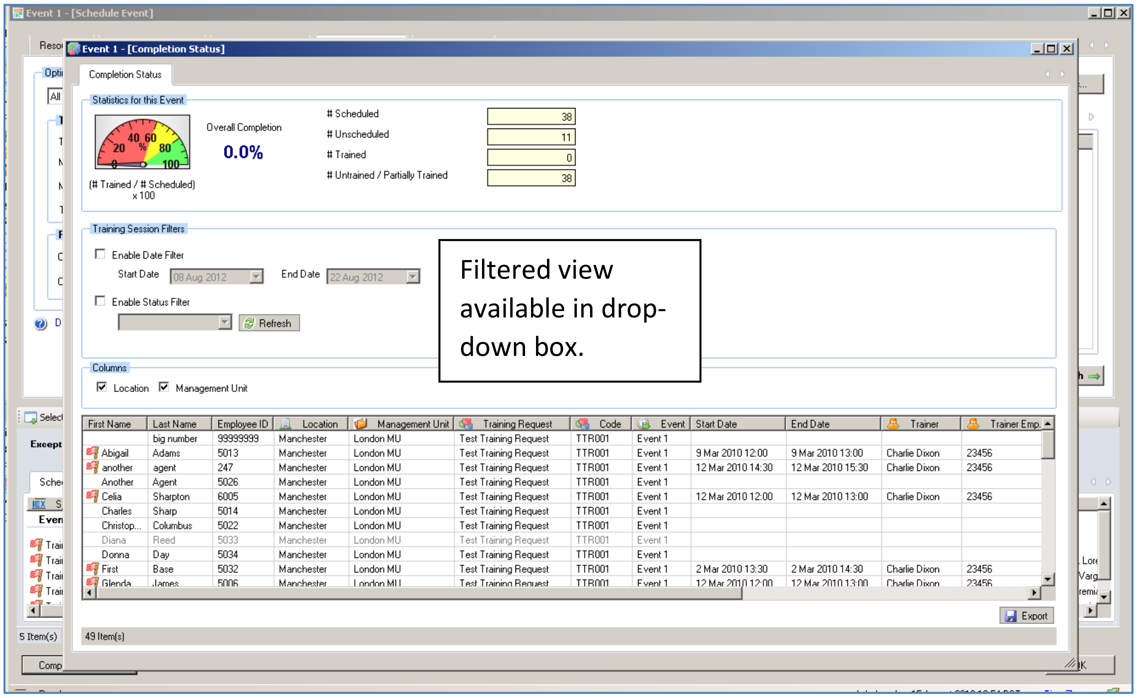



Figure 106: Filtering results using the drop-down menu

## 9.12 Optimized Algorithm Results for Trainer and Room Only Scheduling

When scheduling for trainer and room activity using the Reserved option, the scheduler only creates training sessions for the room and trainer, taking into account the minimum and maximum group size and the room capacity.

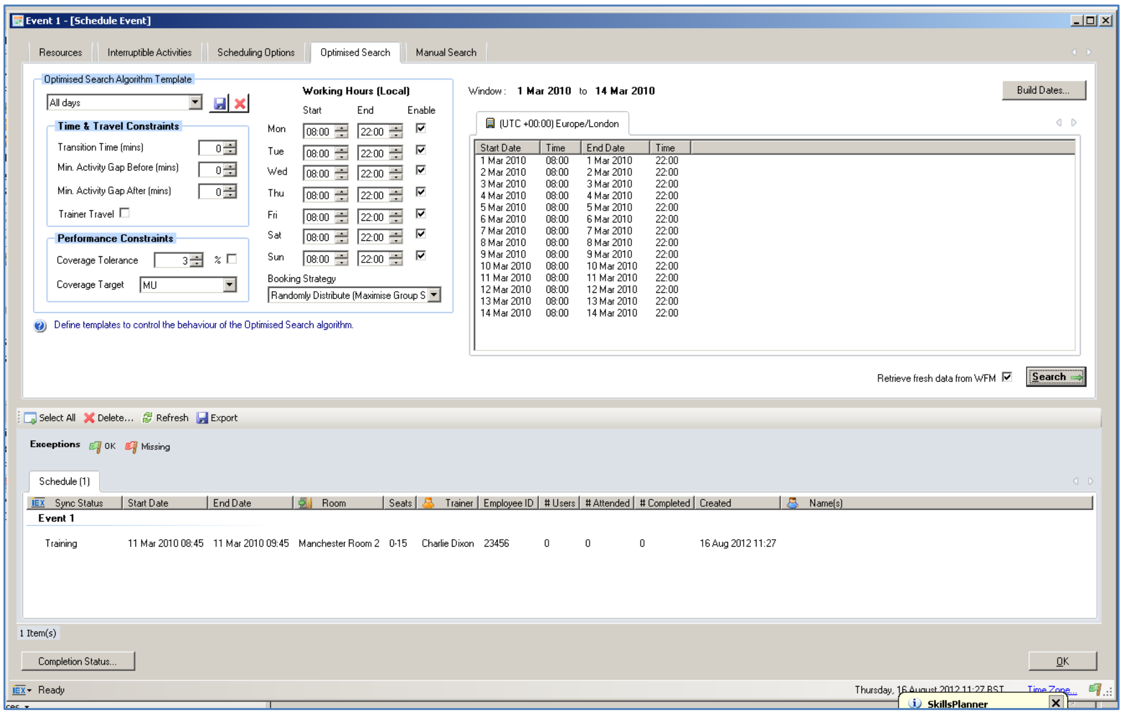


Figure 107: Scheduling training sessions for trainers and rooms using the reserved option

Agents can be scheduled into these training sessions at a later date, either by cancelling the room and trainer sessions and then re-running the Scheduler after selecting the users from the **User Selection** tab,

or

by selecting the agents in the **User Selection** tab and then right-clicking the individual training sessions, as in the example below.

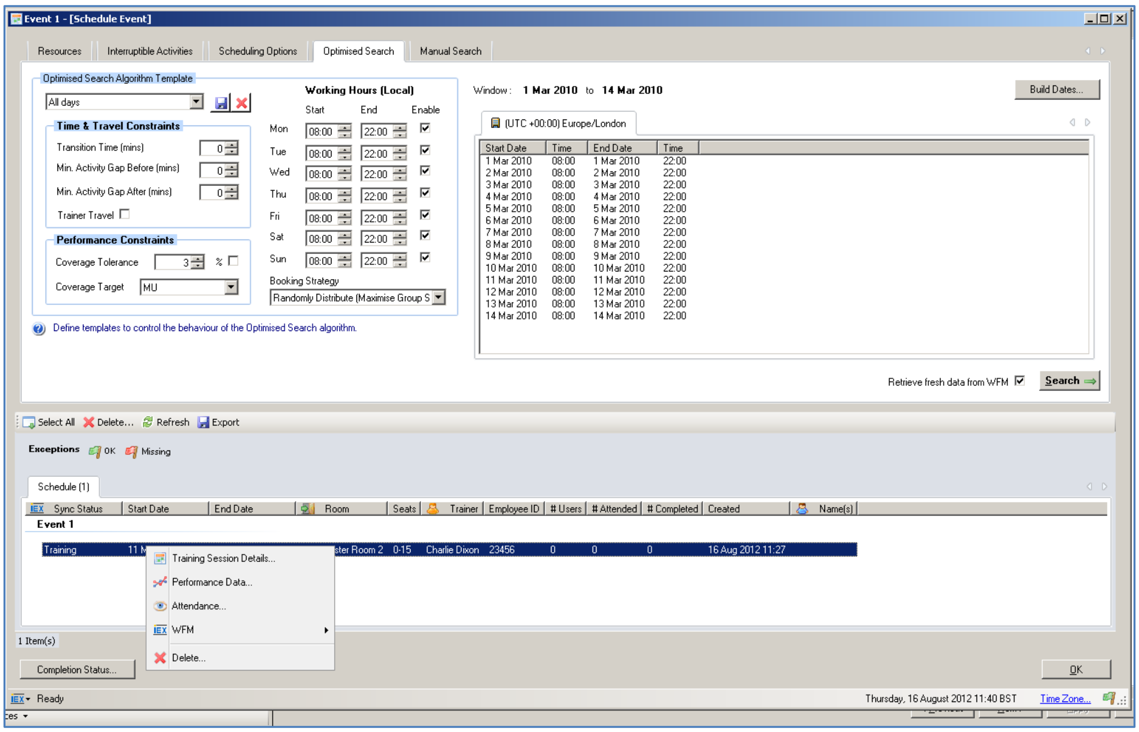



Figure 108: Selecting agents in the user selection tab

Manually select the users from the right pane and click **<Add>.** This will assign the user to the training session.

**Note**: If the user's schedule does not fit the training window an error will appear. This option could be used for an individual user, but deleting the training sessions and re-running the schedules with the users as part of the equation is recommended.

It is possible to amend the training session end time if required using the up and down keys. After selecting OK, Training Manager will check that there are no conflicts with the trainer or room, or whether the agent schedules still fit within the training session times. If the time is extended, the coverage tolerance will not be taken into account due to the change being manual.

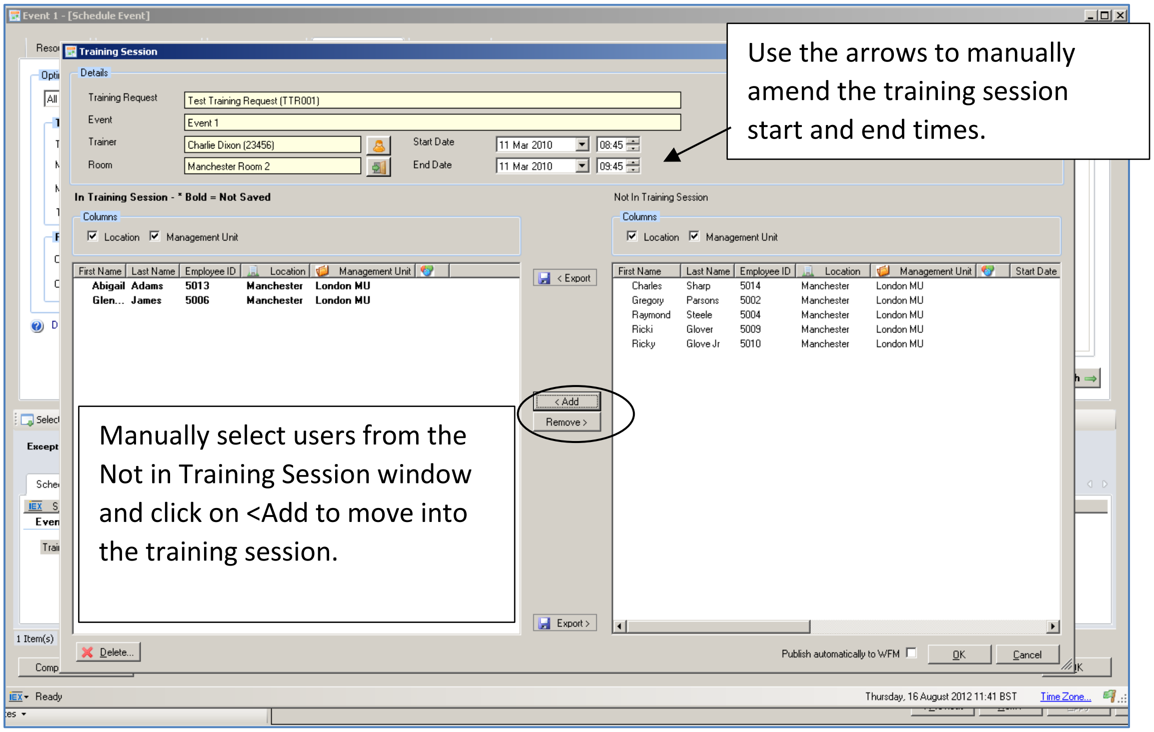



Figure 109: Amending training session details

## 9.13 Committing Training Activity into WFM

The training must be committed to WFM in order to view the impact. Highlight the training sessions (this can be done in bulk or individually) by highlighting one session and then right-clicking it and selecting **WFM**, or use the **Select All** button.

After selecting **WFM** the available options are:

- **Publish** – this will commit the training session and publish in WFM.
- **Remove** – this allows for the training sessions to be removed but still keep the created training session details.

To remove and delete the training sessions either click **Delete** or click **Select All** and then click the 

button.

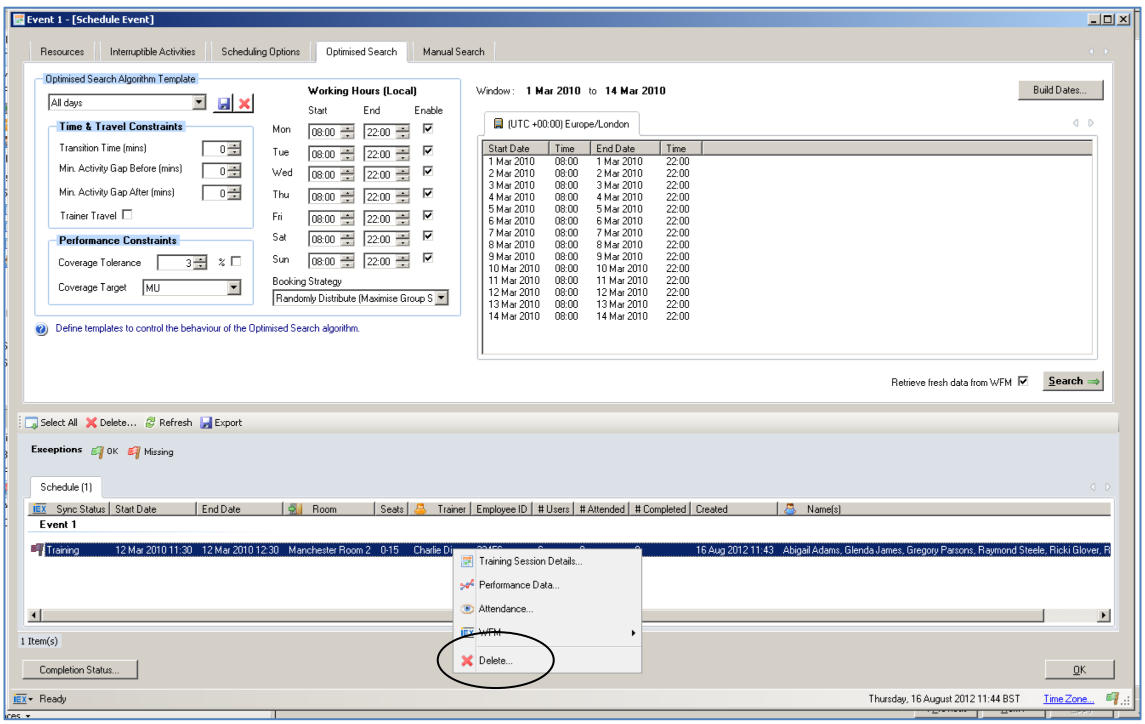



Figure 110: Removing training sessions

If you select **Publish**, Training Manager will then start to commit the training to WFM. A pop-up window will appear alerting you that publishing the training sessions may take a few minutes. Click **Yes** to continue.

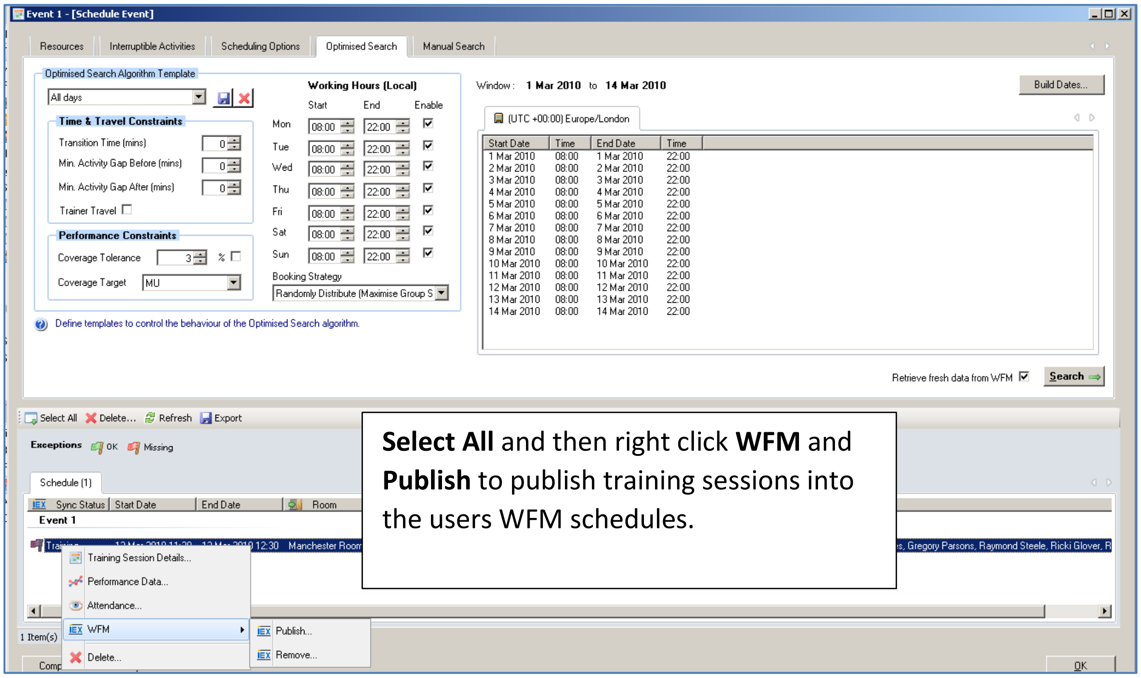



Figure 111: Publishing training sessions

When publishing is complete, the red flags will turn green to confirm that the training exceptions have been committed to WFM.

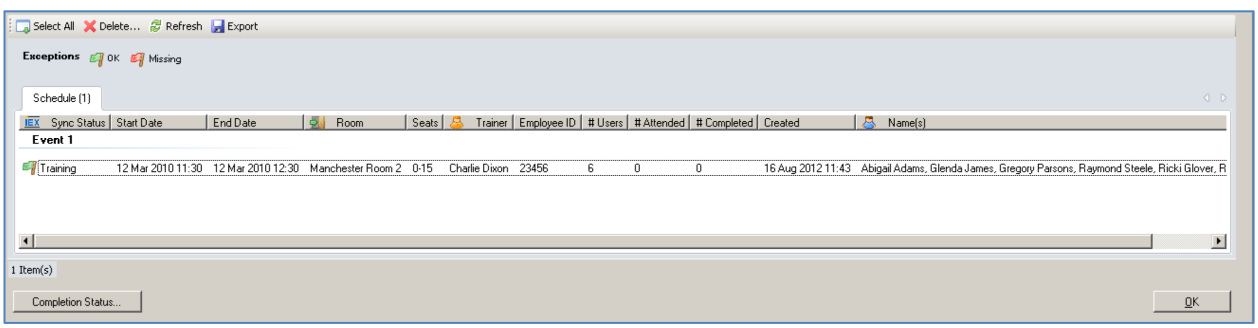



Figure 112: Notification that the training exceptions have been committed to the WFM

Click **Refresh** to update the schedules with the new activity.

WFM will now include the training exceptions within the schedule or scenario selected in the **Resources** Tab. Training Manager has inserted the exception into the relevant agent schedule, which has automatically reduced the coverage by the number of agents and the time and duration of the training.

## 9.14 Cancelling a Training Session

Training sessions created through Training Manager should only be cancelled by Training Manager, as the application will track the training requirements and activity.

To cancel a training session and remove the exceptions from WFM, highlight the training session to be cancelled and then right-click it and select **Delete**, or use the 

button.

There is also the option to only remove the training sessions from WFM to view whether the training needs to be cancelled if by taking agents off the phone for training will impact performance.

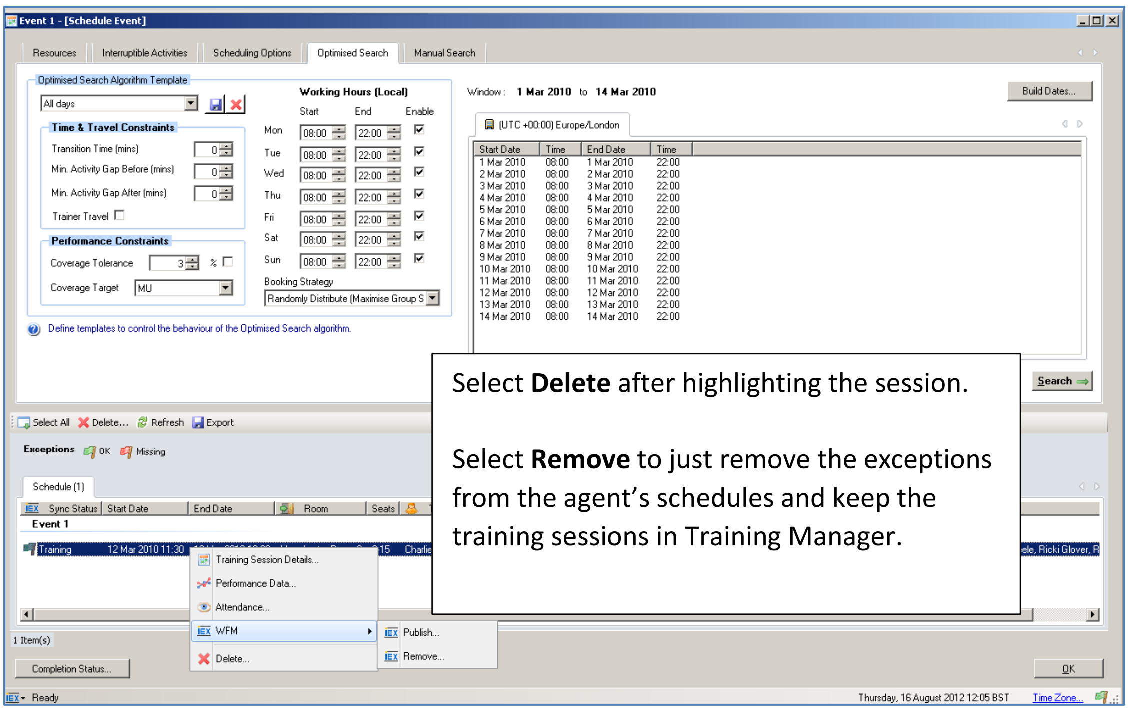



Figure 113: Cancelling a training session

The session will be removed from the **Training Sessions** window and the agents that were scheduled for that session will be identified as unscheduled when viewed in the **Completion Status Report**.

The exceptions will be removed from WFM after refreshing the data.

## 9.15 Cancelling a Training Session for an Individual

A training session can be cancelled for an individual by expanding the training session, right-clicking the session, and then selecting **Training Session Details**. This will list all of the delegates for that training session together with the room and trainer if they have been scheduled as part of the training session. See the example on the next page.

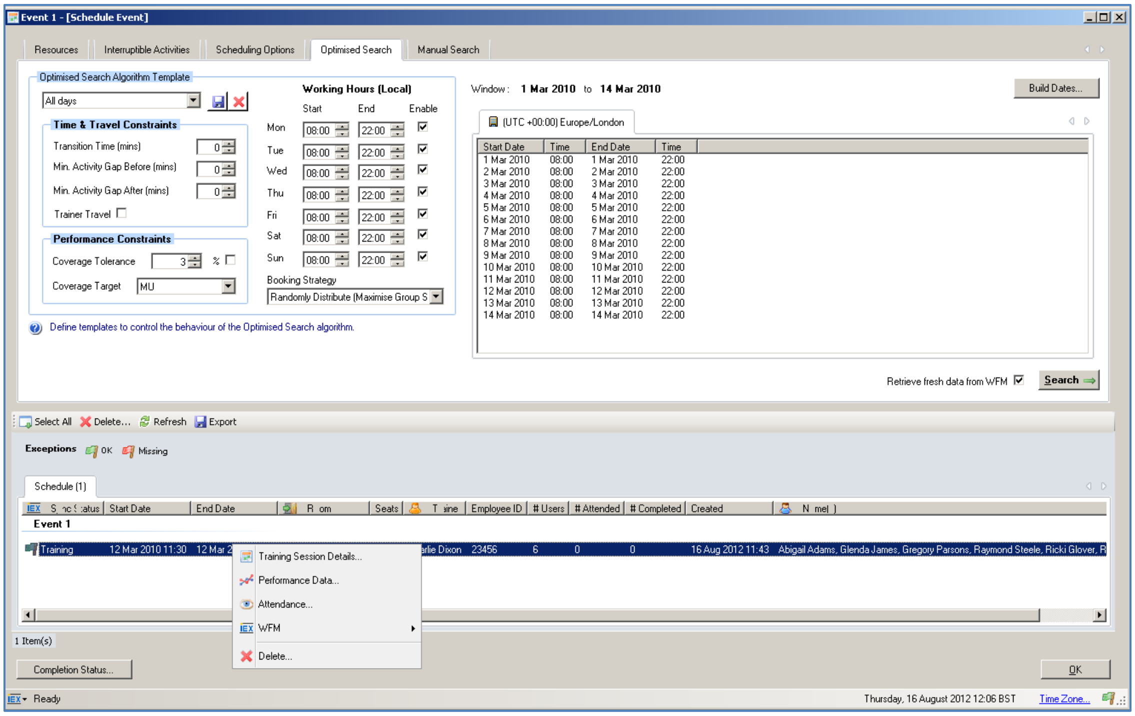



Figure 114: Cancelling a training session for an individual

Once the agent details are visible in the **Training Session Details** window, users can be manually removed by highlighting the individual and clicking **Remove**. This will remove the user and put them in the **Not in Training Session** pane on the right.

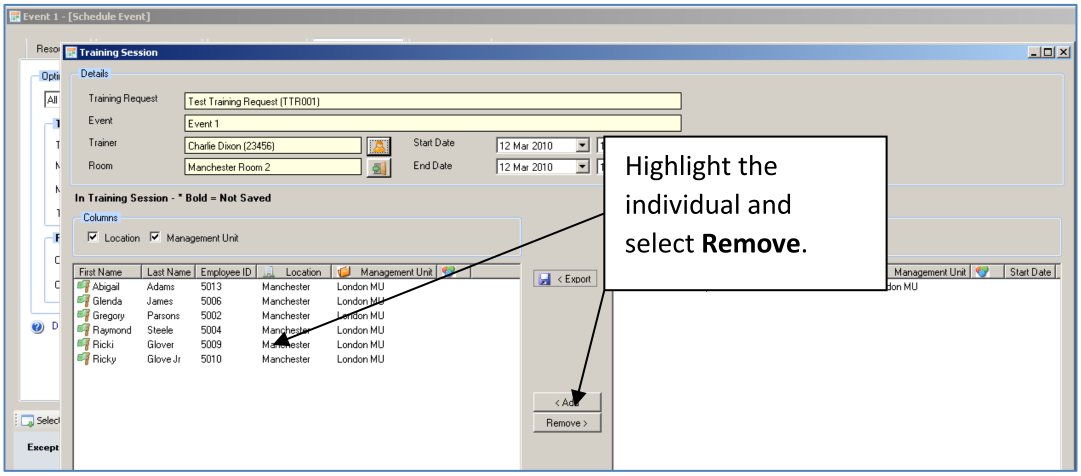



Figure 115: Cancelling a training session for an individual

The agent will then appear in the **Completion Status Report** as unscheduled.

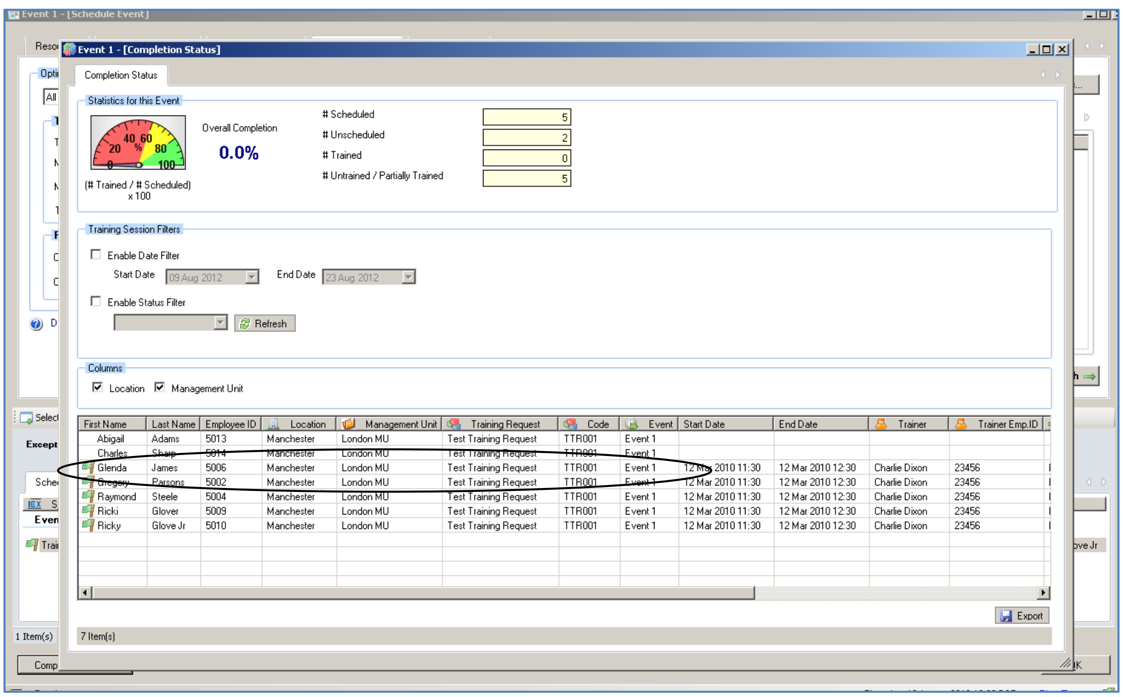



Figure 116: Display of completion status report for unscheduled agents

Agents that have not been scheduled or have not attended the training and need to be scheduled later will remain as part of the original training schedule and can then be scheduled as "Mop Ups" if required.

## 9.16 Training Session Backfill

The backfill feature provides the ability to add users to existing training sessions that have spaces available, rather than automatically creating new training sessions. This feature can be used to add users who have not previously been scheduled or who have missed previous training sessions (mop-ups) to existing sessions.

Backfill is enabled on a per-training event basis and is enabled by default. It can be enabled/disabled from the Training Events tab when creating or editing training requests, or from the Scheduling Options tab when scheduling a training event.

Searching for training sessions with the backfill option disabled will result in the search algorithm creating new sessions for users as normal.

**Notes:**

- Backfilling of users only applies to future sessions (it is not possible to backfill users into training sessions that occurred in the past).
- Backfilling is not supported for meeting requests/meeting sessions.
- The ‘Keep teams together’ option will be respected for users who are backfilled into existing sessions.
- Backfill is supported for both the master schedule and for scenarios. It is possible to copy backfilled sessions from scenarios into the master schedule. Once users are booked onto sessions on either the master schedule or a scenario, they will no longer be available for backfilling on another schedule.

# 10 Scheduling pre/post course assessments from Skills Training Manager

Skills Training Manager supports the ability to associate Performance DNA assessments with training requests. Assessments can be set to be completed either before the training course begins, after it ends, or both. This feature can be used to, for example, assess how valuable a training event was by comparing the assessment results of a group of users prior to and after the training session. A single training session can have multiple pre and post course assessments associated with it. It is also possible to associate the same assessment to be taken before and after the course. Assessments assigned to users will then be visible to training attendees either by logging in to Performance DNA, Portal or via the Notifications application.

## 10.1 Assigning pre/post course assessments

Create a new training request. Complete the start tab and click next. Complete the user selection tab and click next. Create a new training session under the event. Right click on the new session and hover over the ‘Add’ option. This will cause two sub-options to appear: ‘Pre-Course Assessment’ and ‘Post-Course Assessment’. Select which type of assessment you wish to add. A Performance DNA login window will appear. Enter the details of a valid Performance DNA user and click OK. Once logged in, an ‘Assessments’ screen will appear listing all available Performance DNA assessments.

By default, if the training session is removed from the WFM, the assigned pre and post-course assessments will also be unassigned from the course’s users by the PrePostHelper application. This option can be overridden via the checkbox on the right side of the Assessments page.

There is also an additional option for pre-course assessments which allows the training scheduler to decide on the number of days the assessment will be available for prior to the beginning of the training session. This option is located on the right side of the Assessments window when assigning pre-course assessments. If this option is left at the default value of ‘0’, the pre-post assessment will be available from the time it was published to the WFM until the first day of the training session. Alternatively, entering a value in this field will cause the assessment to be available for the set number of days prior to the beginning of the training session.

Once you have specified which assessment to assign and configured the remaining availability options, click OK to associate the assessment with the training session.

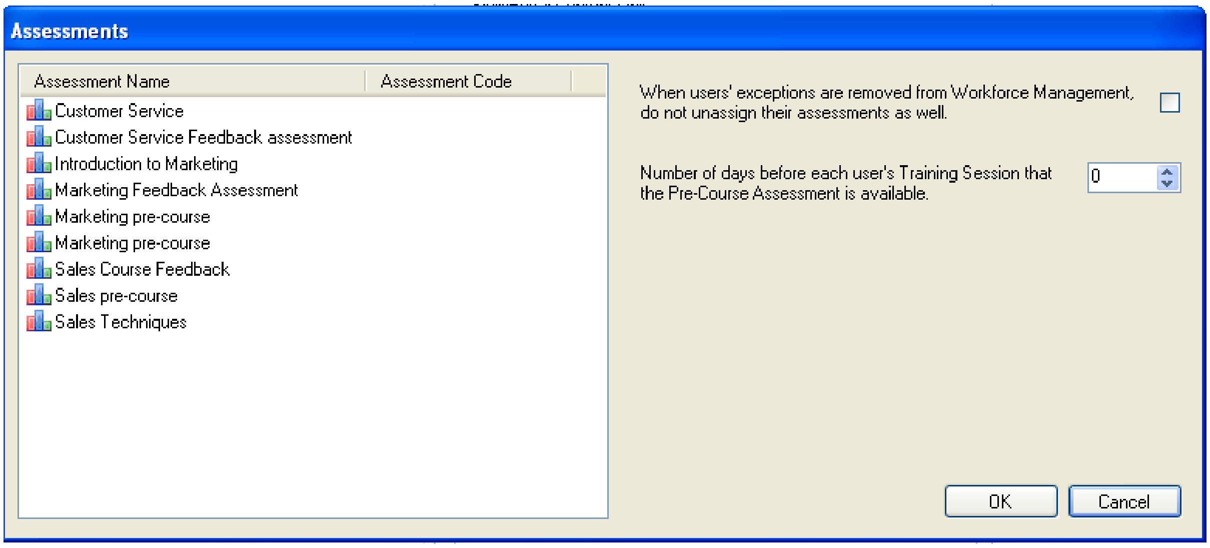



Figure 117: Assigning assessments

It is possible to assign the same assessment as both a pre-course and a post-course assessment. However, the same assessment may not be reused across multiple training events, i.e. once an assessment has been associated with a training request (as either a pre or post-course assessment), it will not be available for assigning in other training events.

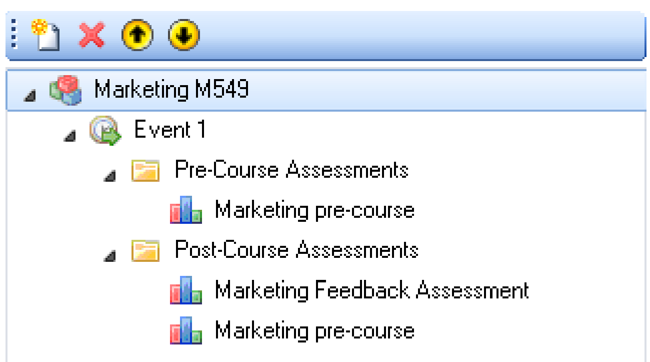



Figure 118: Assigning assessments

## 10.2 Removing pre and post-course assessments

To remove an assessment from a training session right click on it in the Training Events tab and select the **Remove** option. Click the **Apply** button in the bottom right corner of the screen to save the change.

If a session has already been published it will not be possible to remove either pre or post-course assessments until the session is removed from the WFM.

## 10.3 Events that trigger the assigning of pre and post-course assessments

### 10.3.1 Pre-course assessments

Pre-course assessments are assigned once the session is published to the WFM and the preposthelper application has run. Pre-post assessments may not immediately be available to course attendees and may not be listed in their My Development pages depending on whether restrictions were placed on the assessment's availability prior to the course.

### 10.3.2 Post-course assessments

The assigning of post-course events is triggered by the completion of the attendance register (either via the Training Manager client or Training Manager Portal) and the running of the preposthelper application. For single session training requests, the post-course assessment will be assigned once the register for the session has been completed. For multi-session training requests, the post-course assessments will be assigned only when the register for the last training session has been completed. Course attendees need only to attend and complete one of the sessions to be eligible to have the post-course assessment assigned to them, i.e. attendees need not attend and complete all training sessions in order to have the post-course assessment assigned to them.

Unlike pre-course assessments, post-course assessments will only be assigned to those users whose attendance records have been set to both 'attended' and 'completed' for any session in the training request. Users who have either attended or completed (or who have neither attended nor completed) the training session (or multiple training sessions) will not have the post-course assessment assigned to them.

# 11 Scheduling Mop Ups

Agents can be scheduled as part of the original schedule using the Mop Up process. The application will take any agents that have been identified as unscheduled (this will depend on the reason; for example, if the agent has not been scheduled any training activity due to them not having a schedule in WFM they will remain unscheduled) and look at scheduling them for a training session within the original constraints. For example, training window dates, days, hours, and minimum and maximum training numbers in a session.

To schedule agents that have either not been scheduled or have missed training, return to the Scheduler. To access the Scheduler, click the **Training Events** tab, select the event and then select **Schedule Events**.

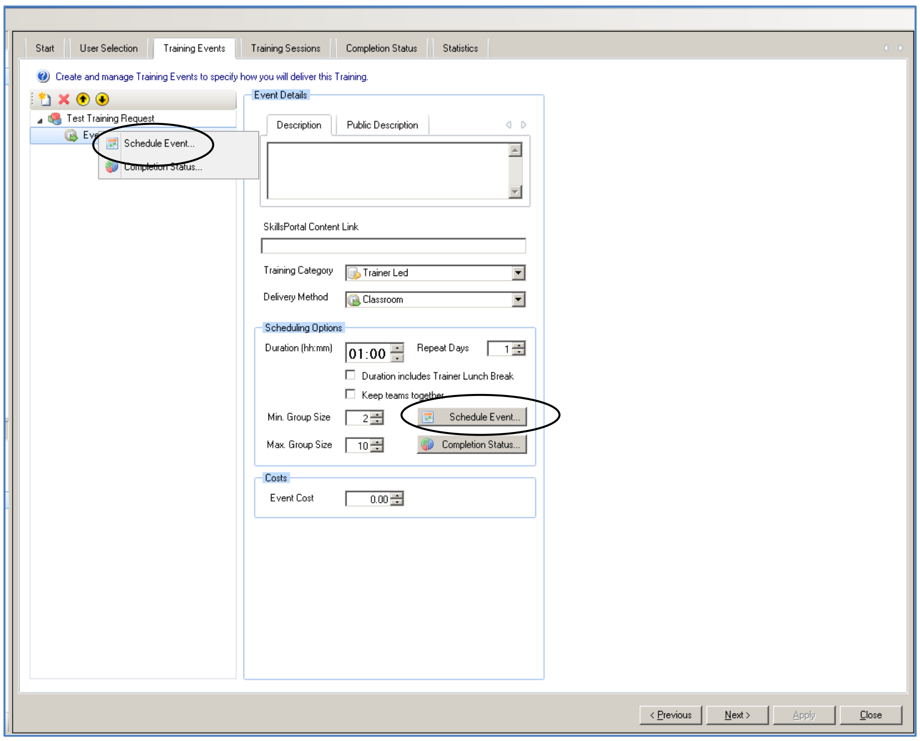



Figure 119: Scheduling mop ups

To re-run the Scheduler, select **Search**; the Scheduler will schedule any unscheduled agents for further training sessions, taking the original constraints into account.

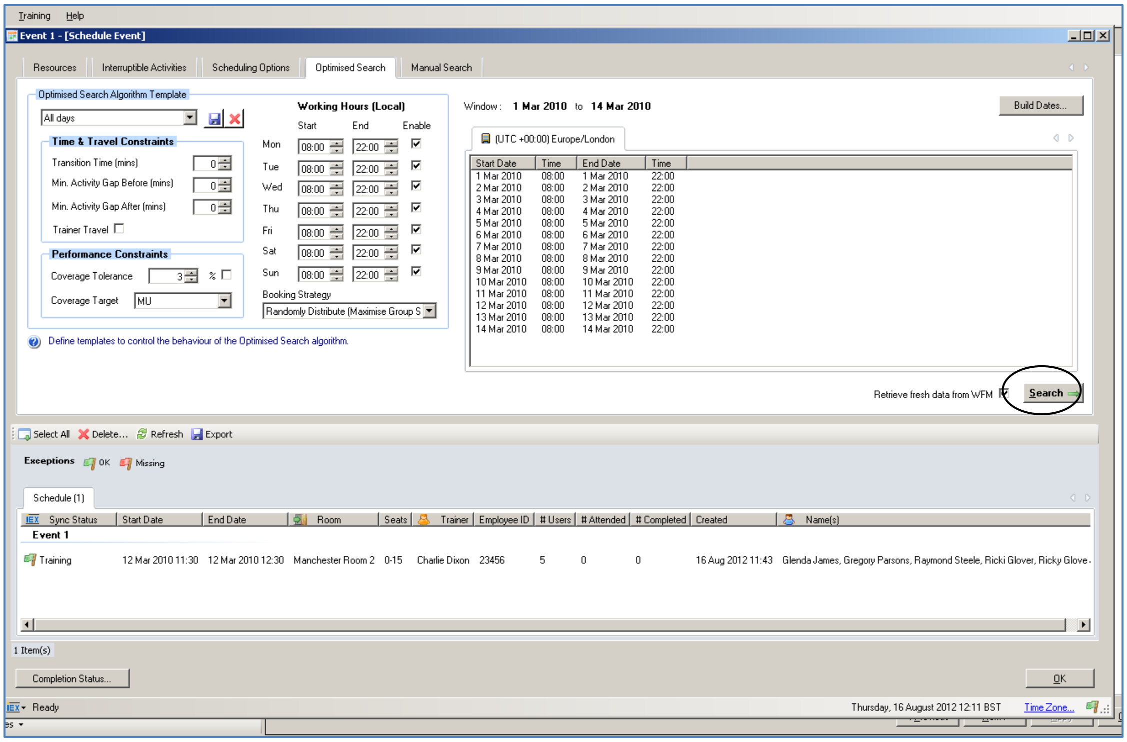


Figure 120: Re-running scheduler to mop up unscheduled agents

Once the Scheduler has finished, the **Completion Status Report** can be used to view any additional agent training sessions.

In the example below, Charlie Dixon has been scheduled for training and the red flag identifies that some or all of the training session is missing from the Master Schedule.

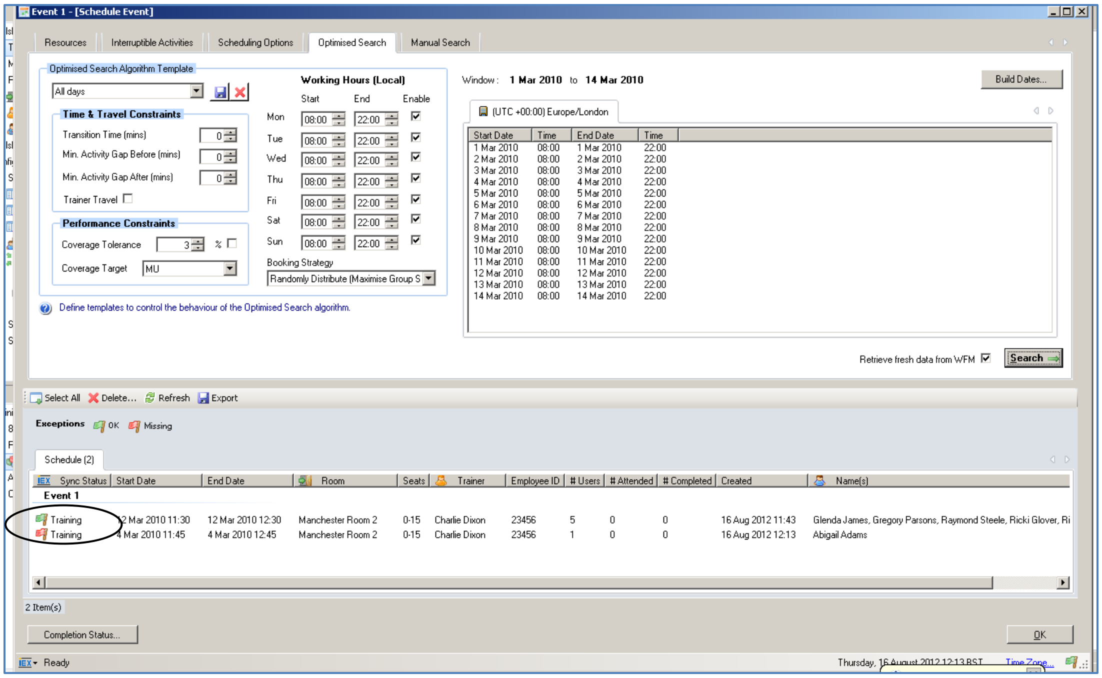


Figure 121: Warning that some or all of the training session is missing from the master schedule

To schedule the additional training into either the Master Schedule or the Scenario, return to the main **Optimization Search Algorithm Template** and select the affected training session. Right-click it to select the relevant option, for example, **copy into the Master Schedule** or **schedule into Genesys WFM.**

# 12 Trainer and Room Hot Swaps

Trainers and / or rooms can be manually changed at any time within a scheduled training session.

To make any changes, the **Training Session Details** window has to be visible, as in the example below. To hot swap a room or a trainer, click the icon to the right of the room or trainer and the tree view with the trainer and room details by location appears. See the example below.

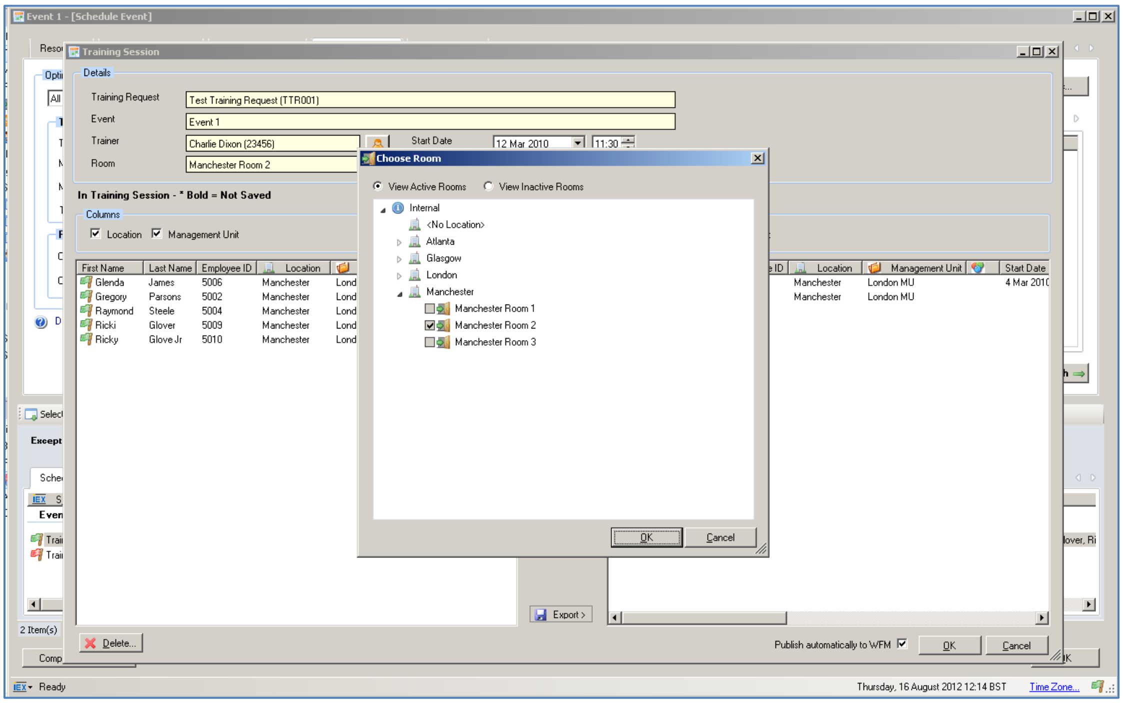


Figure 122: Manually hot swapping trainers and rooms

In the example below, **Room** has been selected, and the option to choose a different room appears.

After selecting an alternative room, click **OK**.

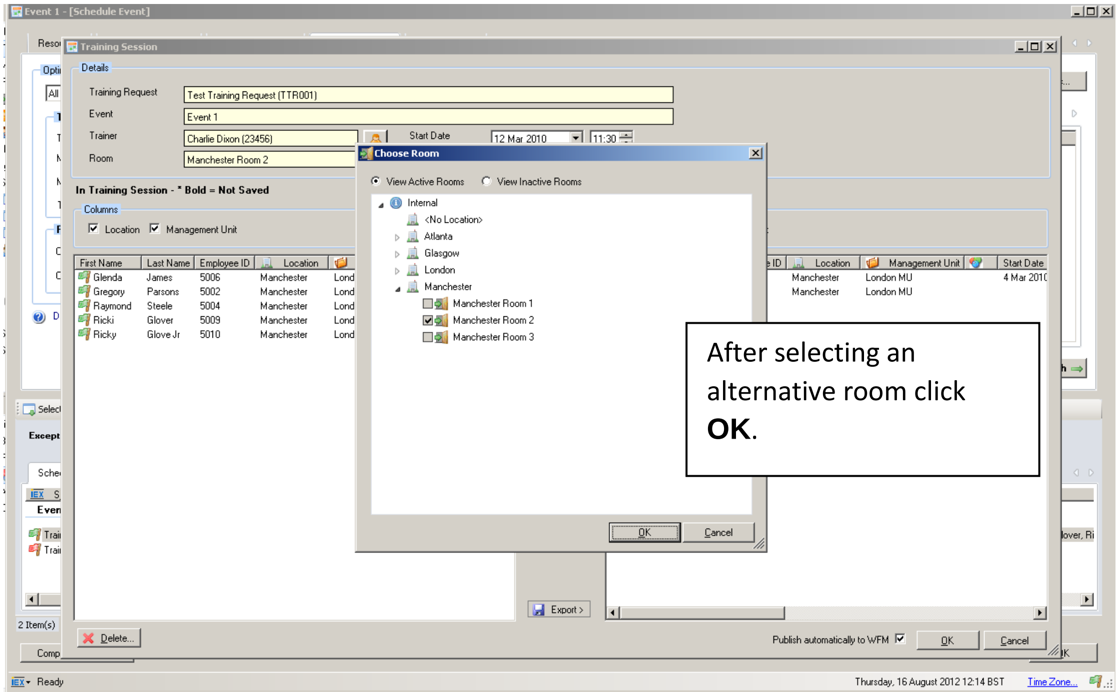



Figure 123: Manually hot swapping trainers and rooms

The application will then check to make sure that the room is available using the information in the **Room Calendar** and it will also make sure that there is sufficient capacity for the number of users selected.

If the room is not available for any reason, an error will be displayed to the administrator allowing them to select another room, as in the example on the next page.

Once the training session has been updated with the new information, the relevant amendments will be made in the associated calendar entries.

Apply the same process when changing the trainer.

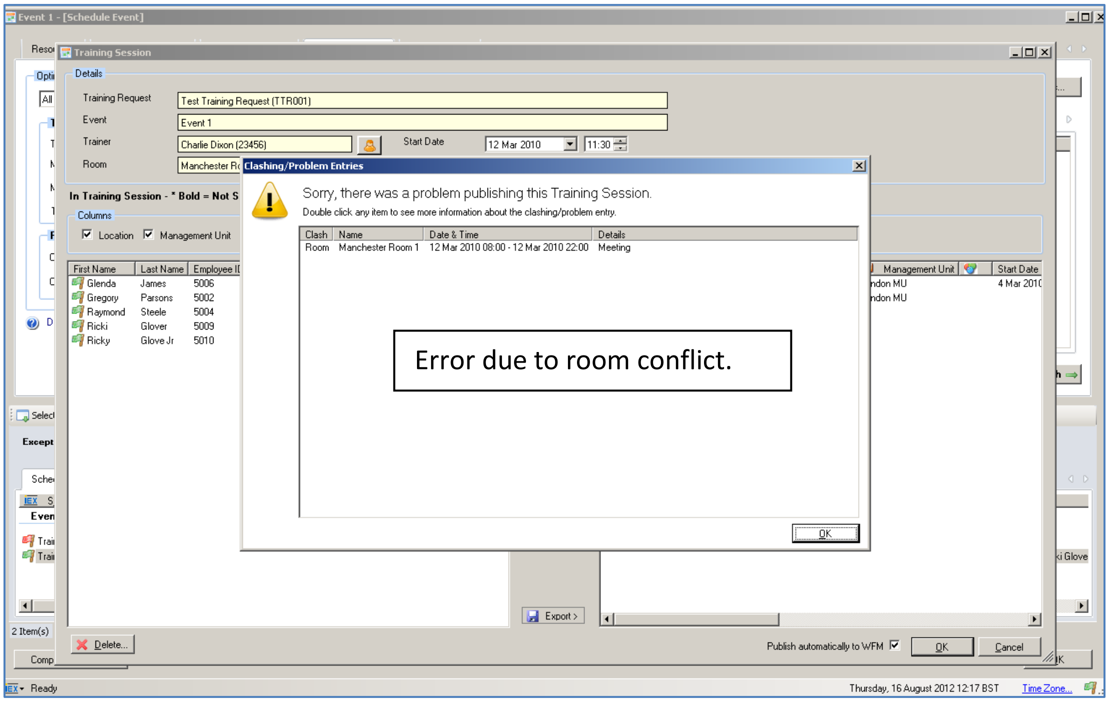



Figure 124: Room conflict error notification

## 12.1 Manual Scheduling

This option is available in Training Manager; however, we see its usage being very limited if at all and recommend that the Optimization Algorithm Template be used instead.

To schedule training session manually, the Training Request template needs to be completed up to the Scheduler or Optimization Algorithm Template option.

No resources are pre-selected as part of the manual scheduling process.

Select **Manual** from the tabs available; the **Training Time Slots** window will change as in the example below.

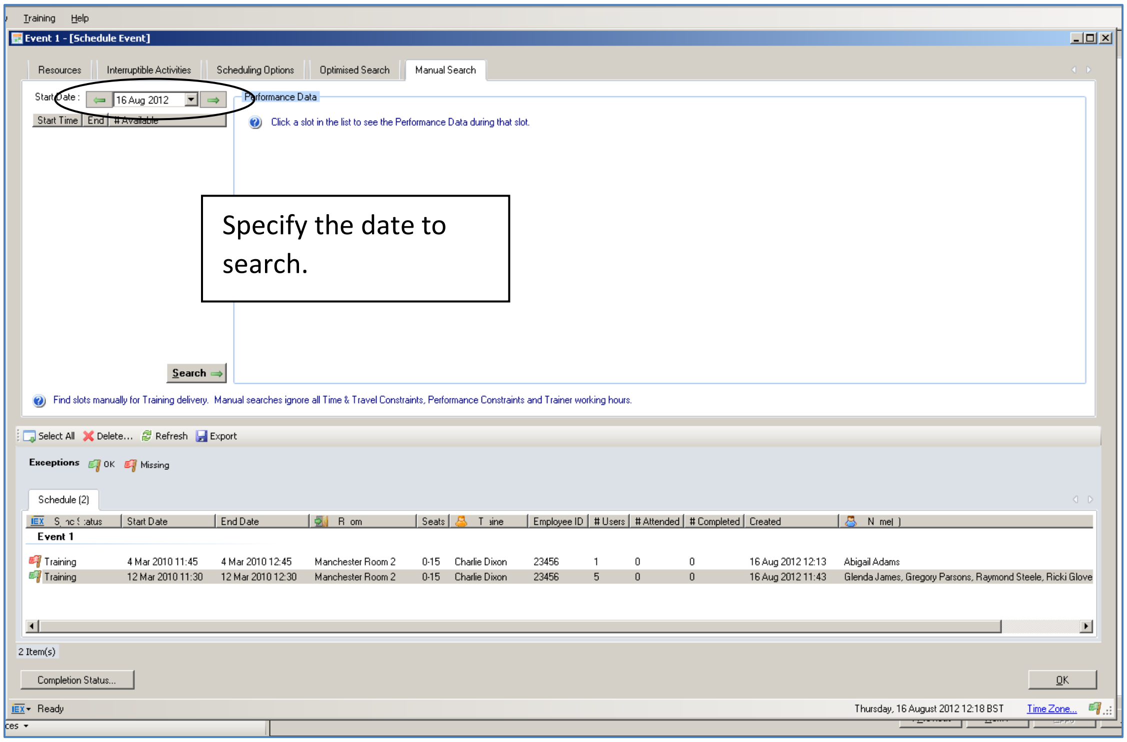



Figure 125: Scheduling training sessions manually

The Event Details information is still visible, which identifies the name of the training together with the training window, duration, and minimum and maximum group sizes. This can be amended if required.

The date to search for users who fit the training criteria must be specified in the **Start Date** drop-down menu. After you have selected a start date, click **Search**.

Training Manager will present the time slots that fit the criteria in the training request.

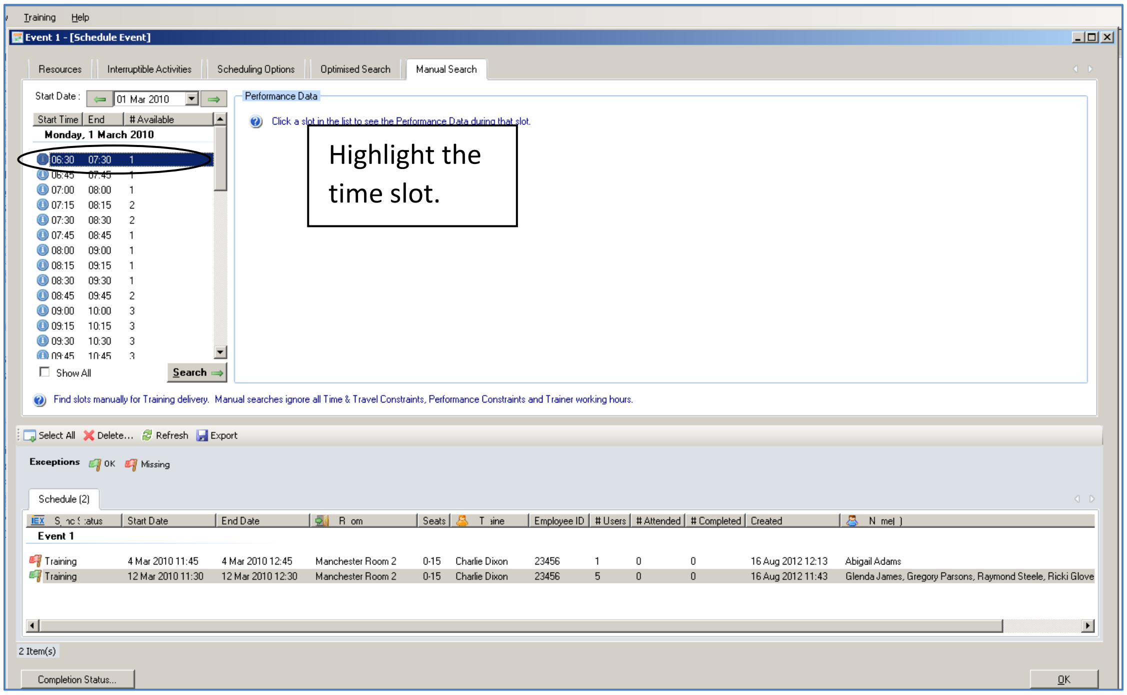



Figure 126: Display of available time slots

To schedule training, double-click the time slot; the **Training Session** window appears. This lists the agents available, the date, and the time of the session.

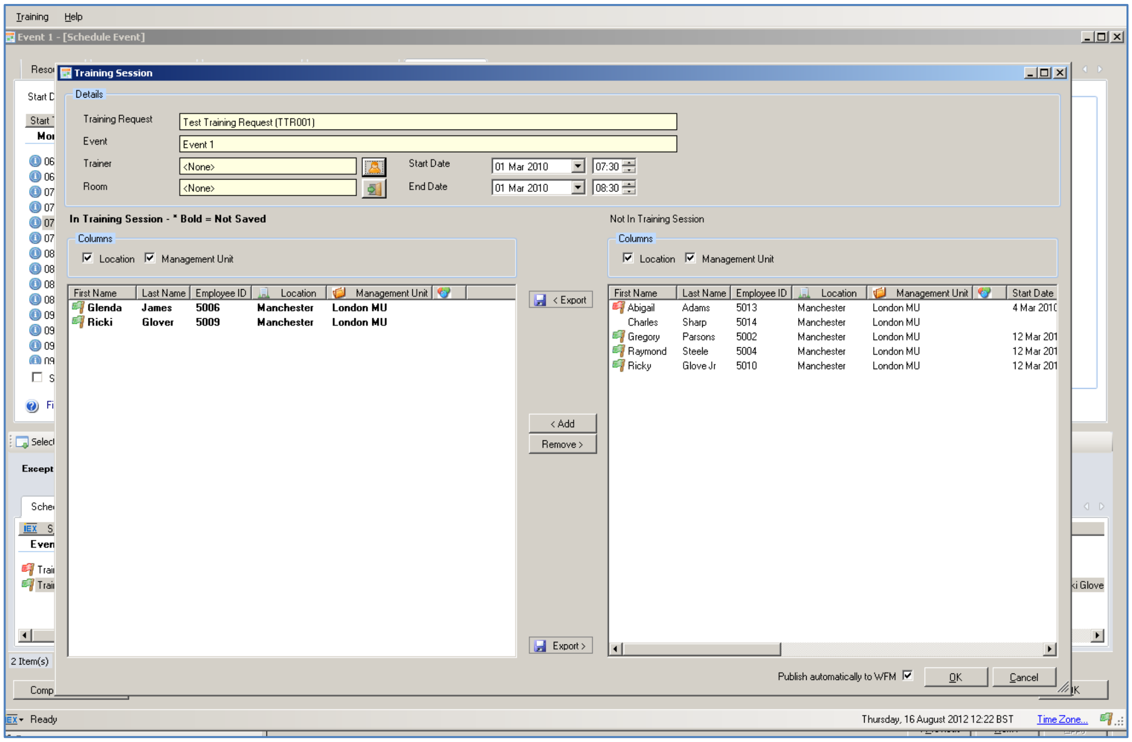


Figure 127: Training session window

To include a trainer and / or a room, use the **Trainer** or **Room** selection icon.

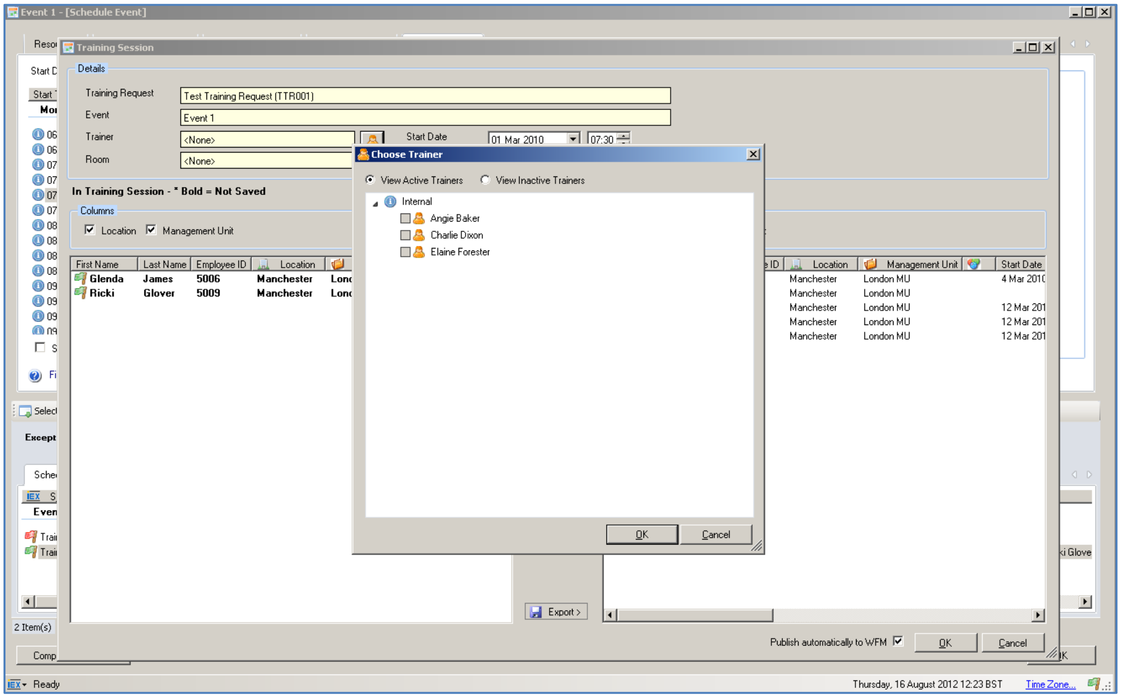



Figure 128: Selecting a trainer

Once the trainer and/or room has been selected, click **OK**.

The training session that you created will then be visible in the **Training Session** window.

Once the training sessions have been created, they can be committed to WFM to view the impact on the coverage as per the Optimization Algorithm Template.

## 12.2 Deleting a Training Request

To delete a training request, any attached information must be disassociated and deleted first. The step-by-step approach must be done in reverse, and only when there is nothing associated with the training request can it be deleted.

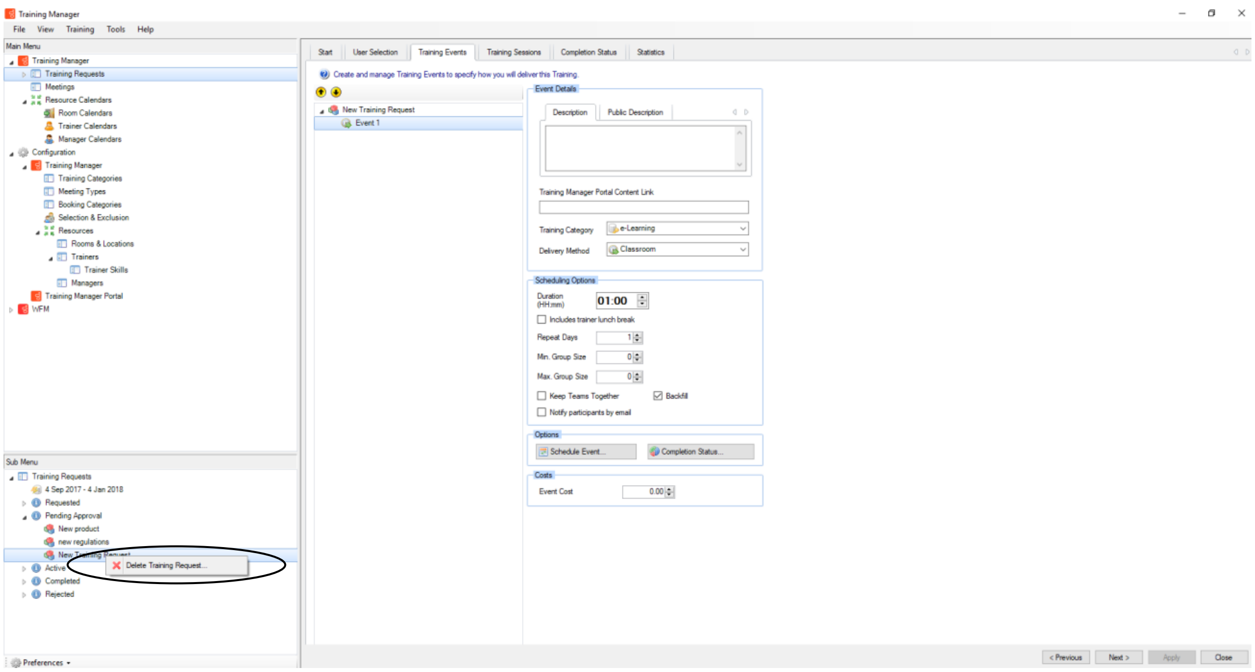


**Figure 129: Deleting a training request**

# 13 Meetings

To create a meeting, select **Meetings** from the **Main Menu**. This is the same process that is used for creating team meetings and one-to-ones.

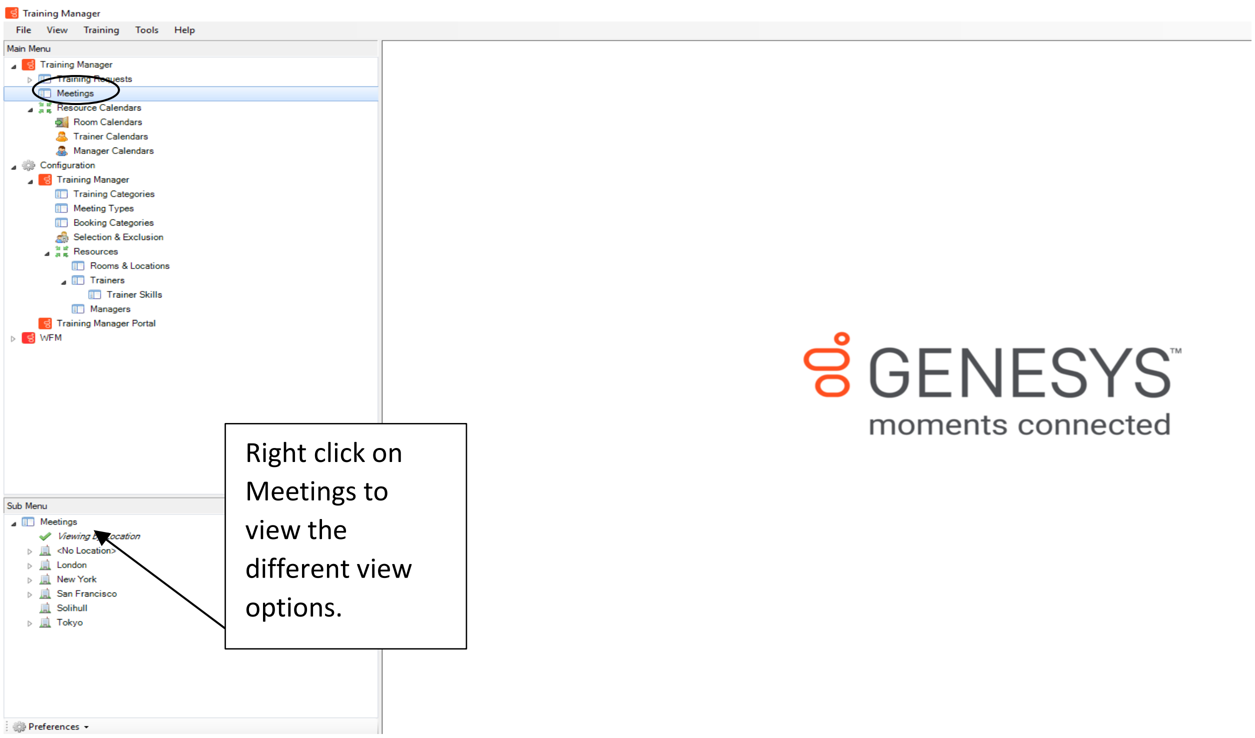



Figure 134: Creating a new meeting

A list of the locations will appear in the **Sub Menu**. The view can be changed to view by manager instead of location by right clicking on **Meetings** in the **Sub Menu**.

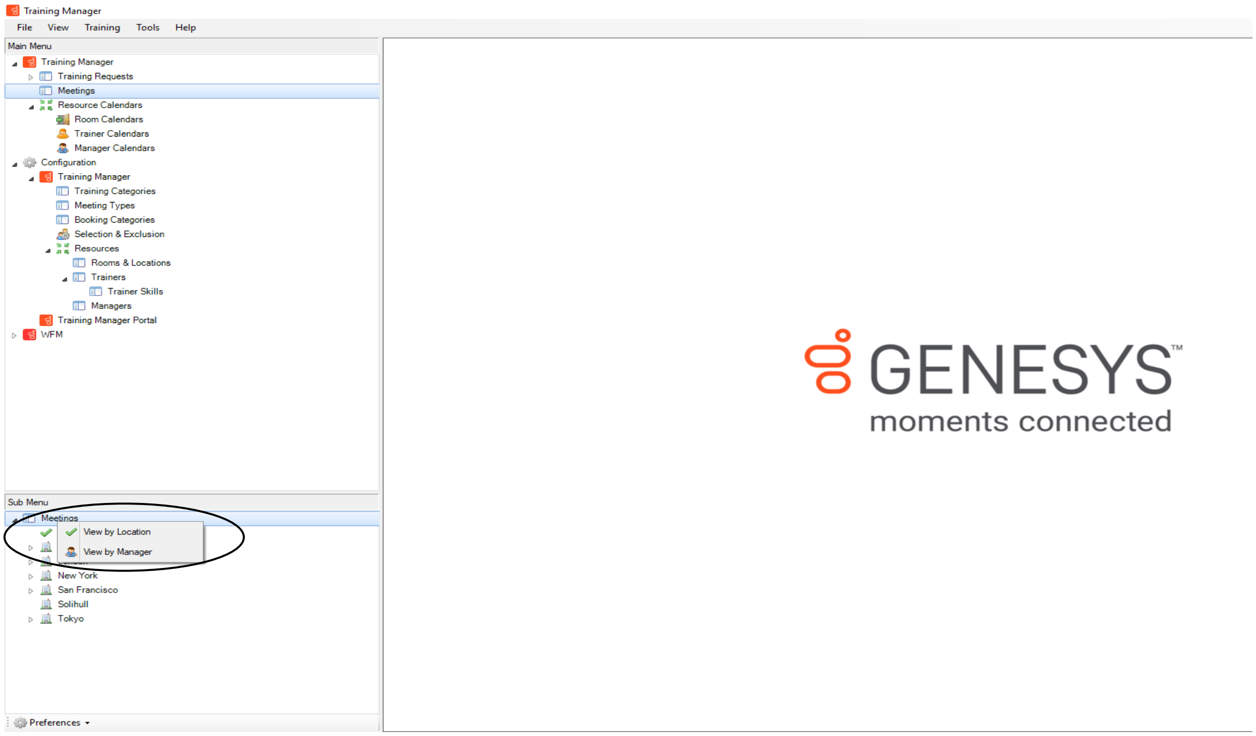



Figure 135: Different view options

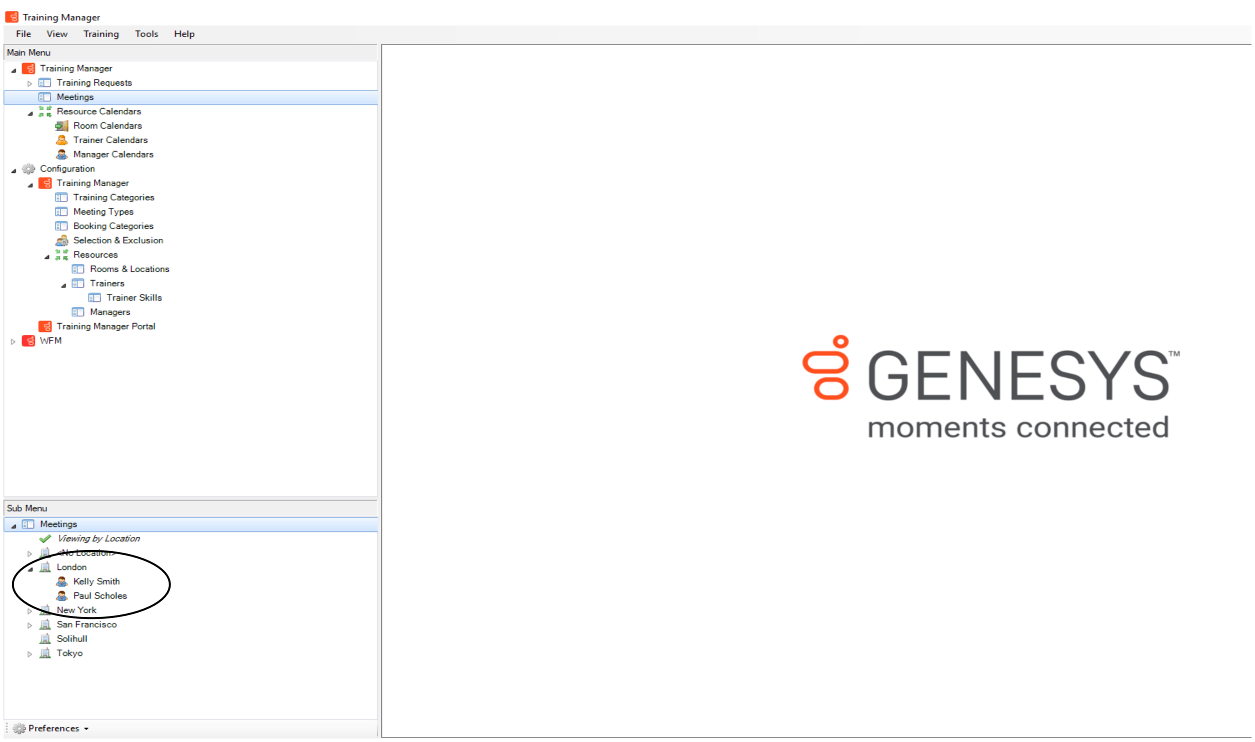



Figure 136: Expanding the location to reveal the associated managers

After clicking either the location or a manager, the meeting view will be presented in the **Main Menu** window (once meetings have been scheduled they will appear as a list in this window).

## 13.1 Creating a Meeting

Click New Meeting to reveal the step-by-step meeting template (as in the example on the next page, which contains some existing meeting templates.).

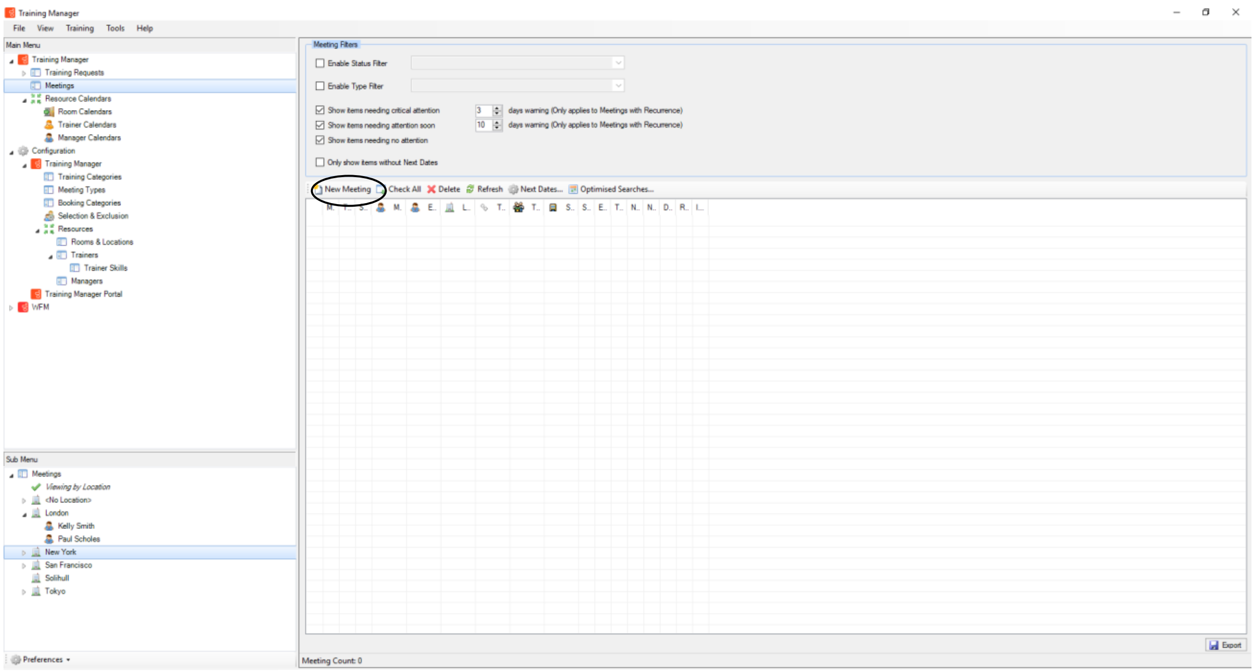



Figure 137: Creating a new meeting

Click **New Meeting;** the step-by-step meeting template appears, with the tabs at the top of the page. In the **Start** window, complete the relevant sections to create the required meeting.

1. **Main Title** – this is the meeting title that the manager and team would see against the meeting scheduled in their web portal.
2. **Meeting Type** – select the relevant Meeting Type from a drop-down menu. There are three options to select from: **Team Meeting, One-to-One** and **Solo Task**.
3. **Description & Objectives** – enter any relevant information about the meeting, as this will also be visible in the web portal against the meeting.
4. **Location** – select a location for the meeting. A meeting's location is based on the location/locations assigned to the manager who has been assigned to the meeting. If the

manager is only assigned to one location, the location field will be automatically populated when the manager is assigned to the meeting. If the manager is assigned to more than one location, these will appear in the Location select box. Agents associated with a meeting will have their locations updated to match the location of the meeting's manager.

5. **Manager –** select which manager to associate to the meeting request (A **Solo Task** meeting does not require a manager).

6. **Status** – There are three options:

    a. **Pending Approval** is used for testing purposes where the schedules are not yet confirmed to appear in any web portal views.

    b. **Active** is used once schedules are confirmed and are required to be visible in web portal views.

    c. **Inactive** is used so that the meetings no longer appear as active.

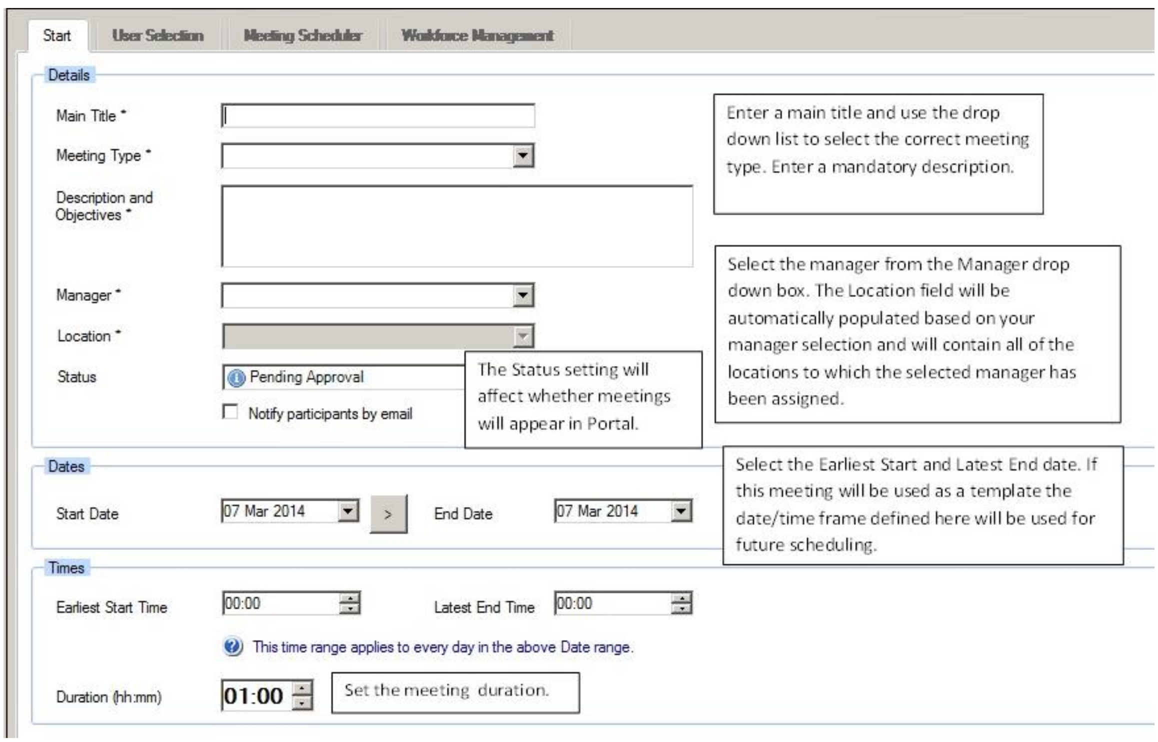
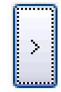



Figure 138: New meeting template

7. **Start Date** – by default the meeting window will be set to the current date.

8. **End Date** – the end date can be selected by using the drop-down menu or by clicking the  button, which then presents three options to select from. Click any of the options and Training Manager will automatically populate the end date.
9. Select the earliest start and latest end time that the meeting can happen.
10. Select the meeting duration.

### 13.1.1 Selecting Users

On the **User Selection** tab, select the users that the meeting is being created for.

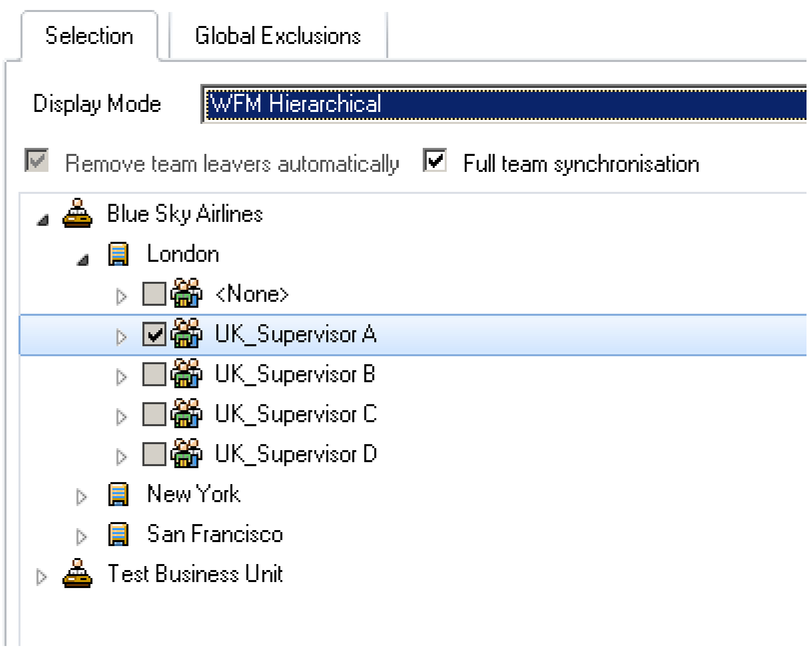



Figure 130: Selecting the team in the user selection tab

Once the relevant users have been selected, click **Next** or click the **Meeting Scheduler** tab.

### 13.1.2 Scheduling

The meeting scheduler tab is where the information required to schedule the meeting is inputted.

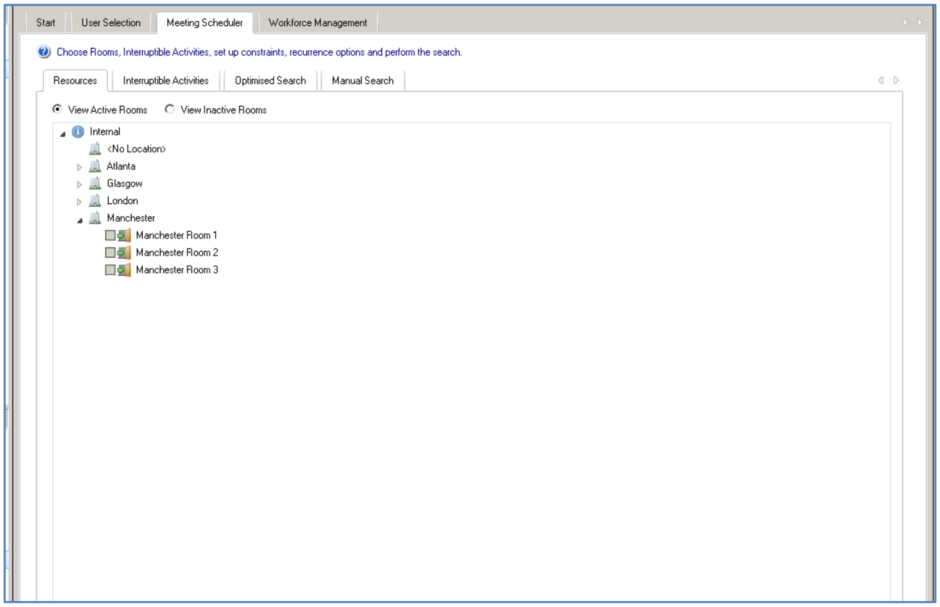



Figure 131: Meeting scheduler tab

There are four tabs available for completion:

#### 13.1.2.1 Resources

Select the required schedule, and there is the option to select a room to schedule for the meeting.

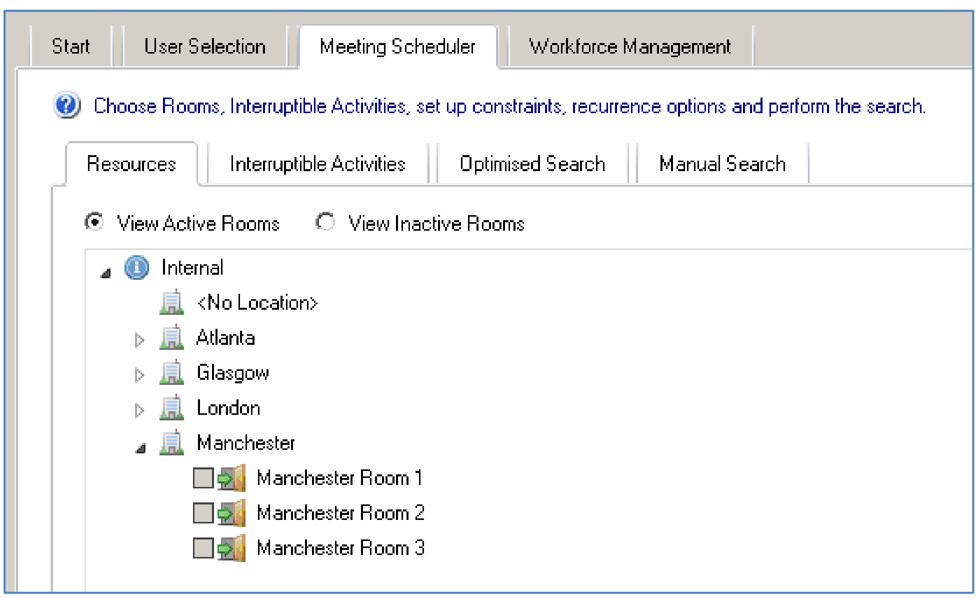



Figure 132: Resources tab

#### *13.1.2.2 Interruptible Activities*

Select which activities can be interrupted as part of the scheduling process.

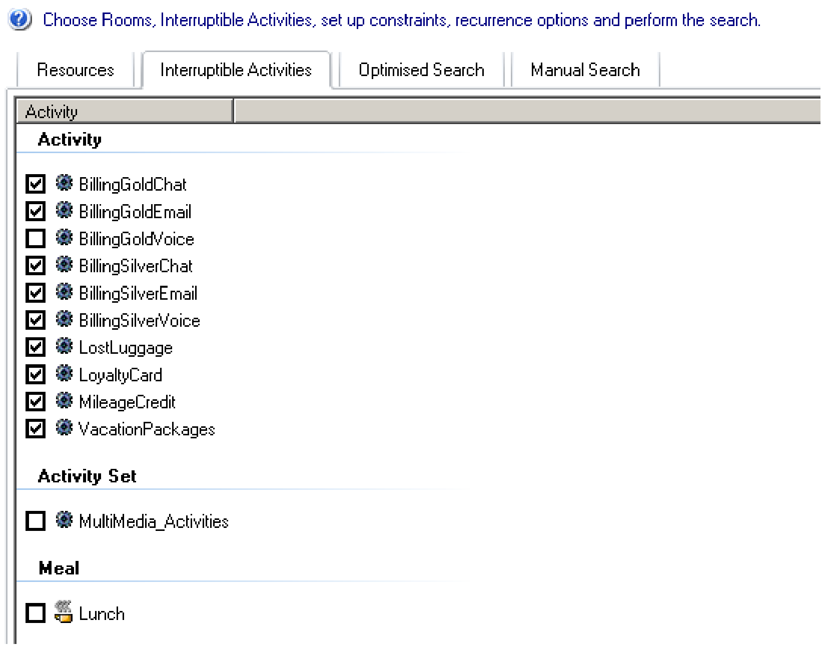



Figure 133: Interruptible Activities

#### *13.1.2.3 Optimised Search*

Select the required constraints as per scheduling training. Under Recurrence, select whether the meeting should be every N Days, Weeks or Months and on what days the meeting can be scheduled.

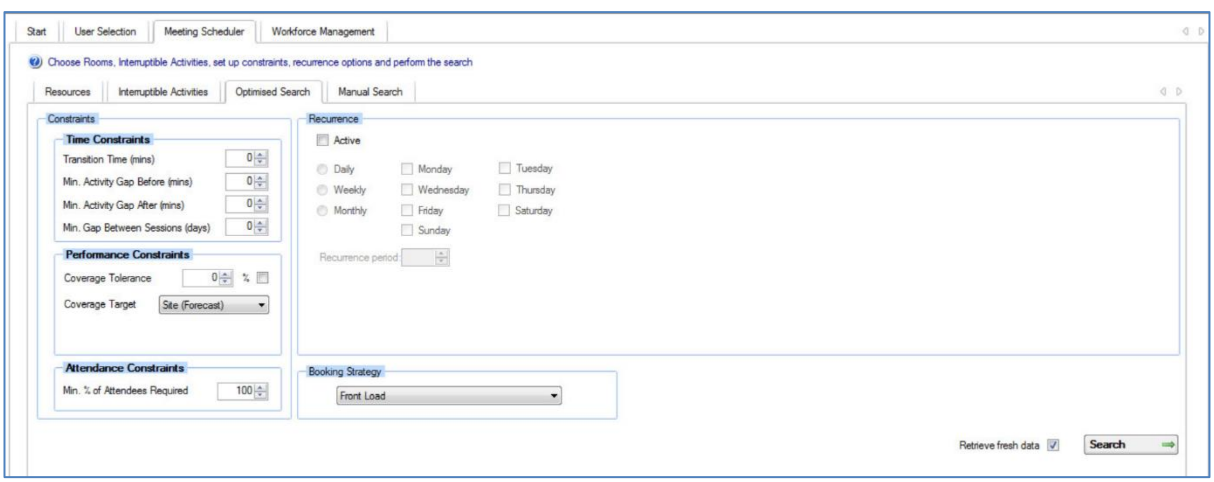



Figure 134: Setting required constraints via the optimised search tab

There are three recurrence options available, **Daily**, **Weekly**, and **Monthly**.

Within the performance constraints, select the required **Coverage Target** and **Coverage Tolerance**.

Attendance constraints only apply when scheduling a team meeting, as this is the minimum percentage (%) of attendees that the Meeting scheduler can schedule. It will always schedule the maximum number of attendees that it can based on the performance constraints.

**Booking Strategy** – select **Front / Random** or **Back Load** as with scheduling training.

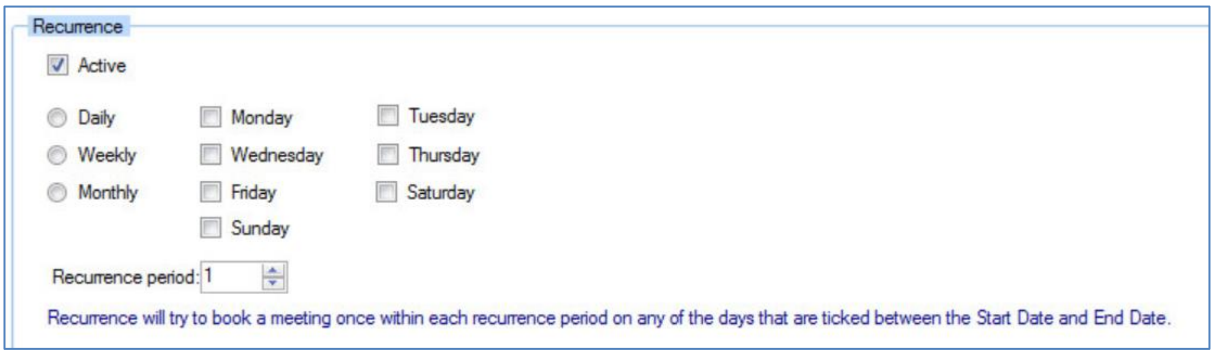



Figure 135: Setting required meeting recurrence options

**Meeting Transition Time** – It is possible to set a transition time for meetings and one-to-ones. This will prevent subsequent sessions for the same meeting request from being booked next to each other.

For example, scheduling one-to-ones with multiple agents with a transition time of 15 minutes will prevent the sessions from starting within 15 minutes of a previous session ending.

**Notes**:

- The transition time rule is only applied to sessions in the same meeting request. Transition time will not be respected for sessions created via other meeting requests.
- If the meeting manager is also an agent in WFM then the transition time will not be taken into consideration when determining the possible start time for a meeting.

Click **Search** to retrieve fresh data from WFM.

### *13.1.2.4 Creating Meetings Manually*

To create a meeting manually, select Manual Search from the Meeting Scheduler tab.

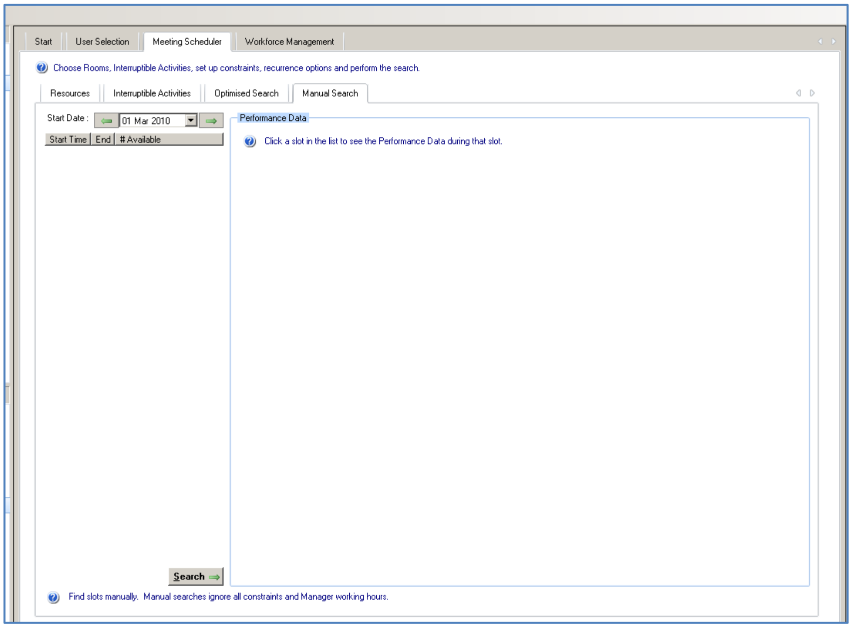



Figure 136: Manually creating a meeting

After selecting the date, click **Search** to reveal the number of available agents by time slot.

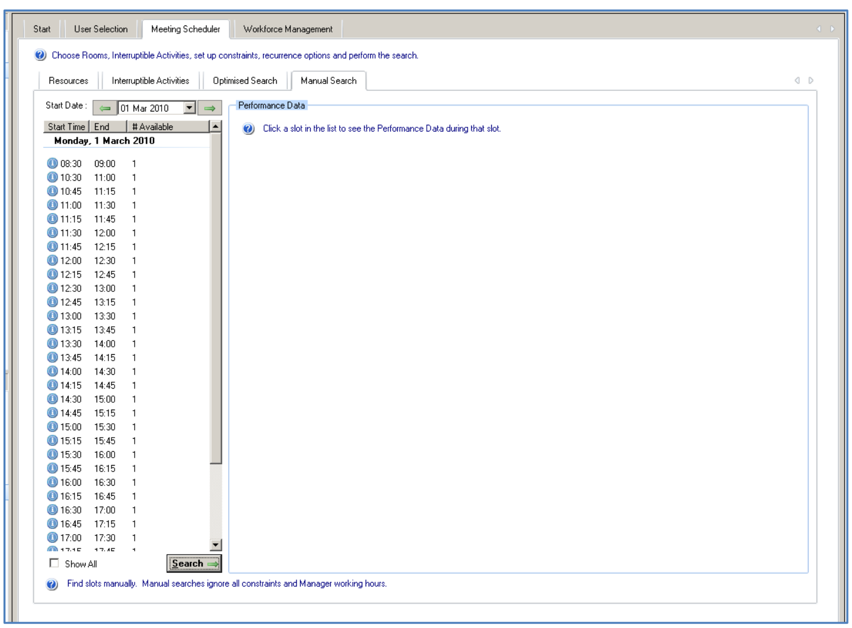



Figure 137: Viewing available agents for a meeting

Double-click the time slot to view a meeting session window similar to the meeting below. Click **OK** to create a manual meeting session.

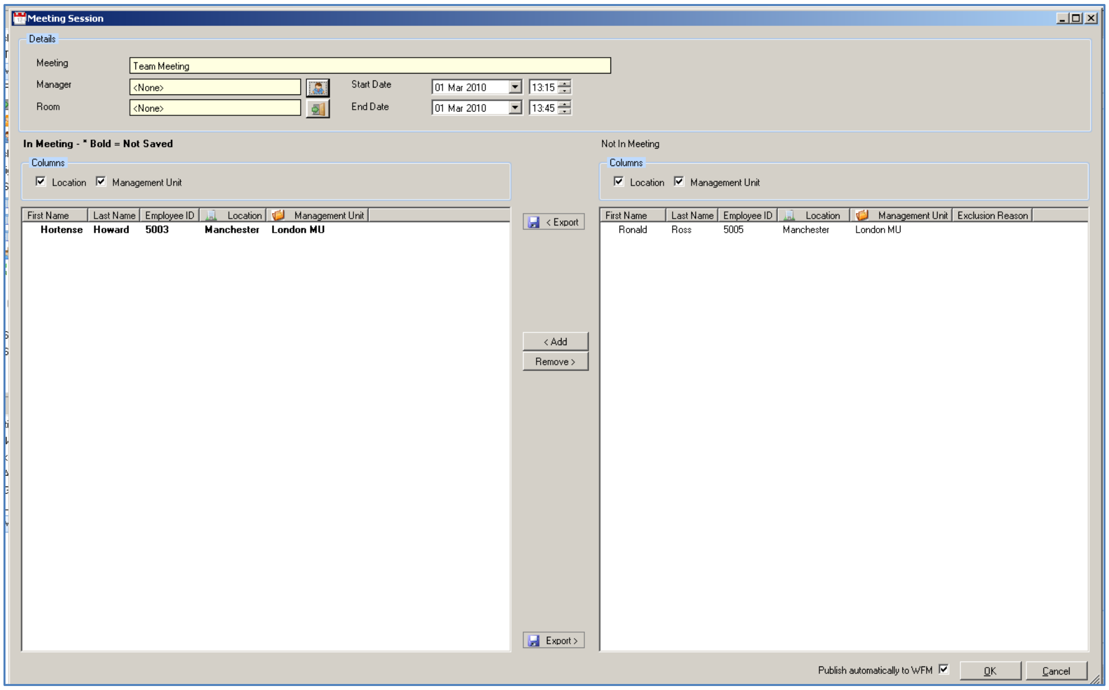



Figure 138: Meeting session window

The option to select a manager will appear. After selecting the manager, click **OK**. A meeting session will appear in the **Workforce Management** tab.

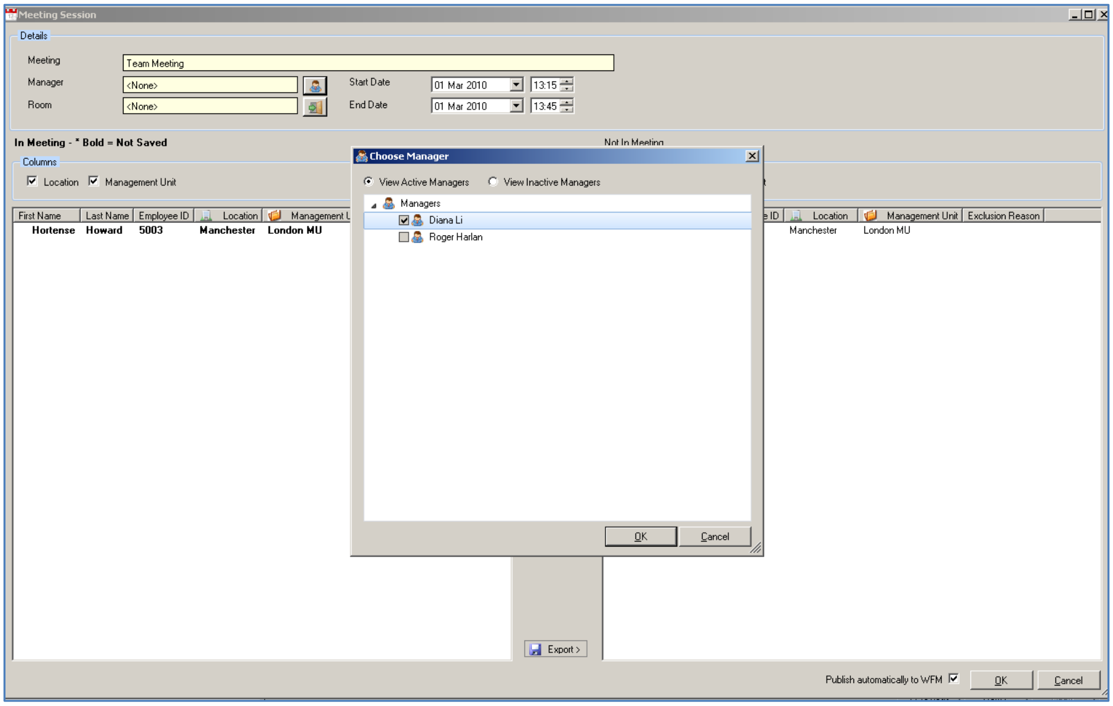



Figure 139: Selecting a manager for the meeting

### 13.1.3 Workforce Management

Select the **Workforce Management** tab to reveal the suggested meetings.

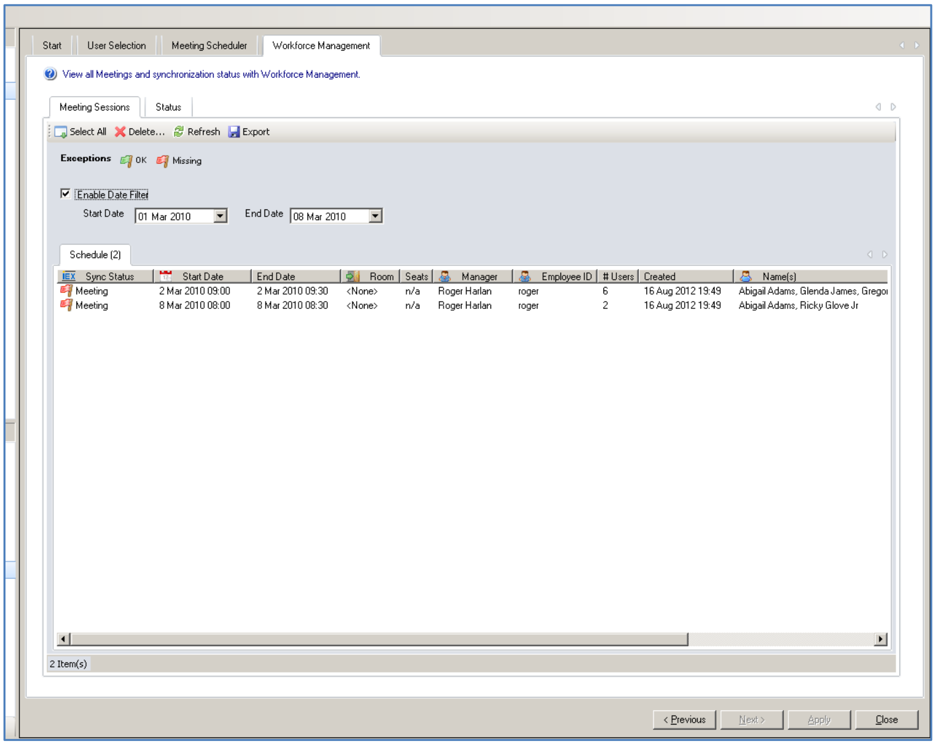



**Figure 140: Workforce management tab options**

The **Schedule** tab identifies the number of meetings created.

The red flag indicates that the meeting requests have not been committed to WFM. To commit the meetings into WFM, select the meeting sessions and commit them to WFM as per the training requests.

Clicking **Status** displays the scheduled meeting activity in report format.

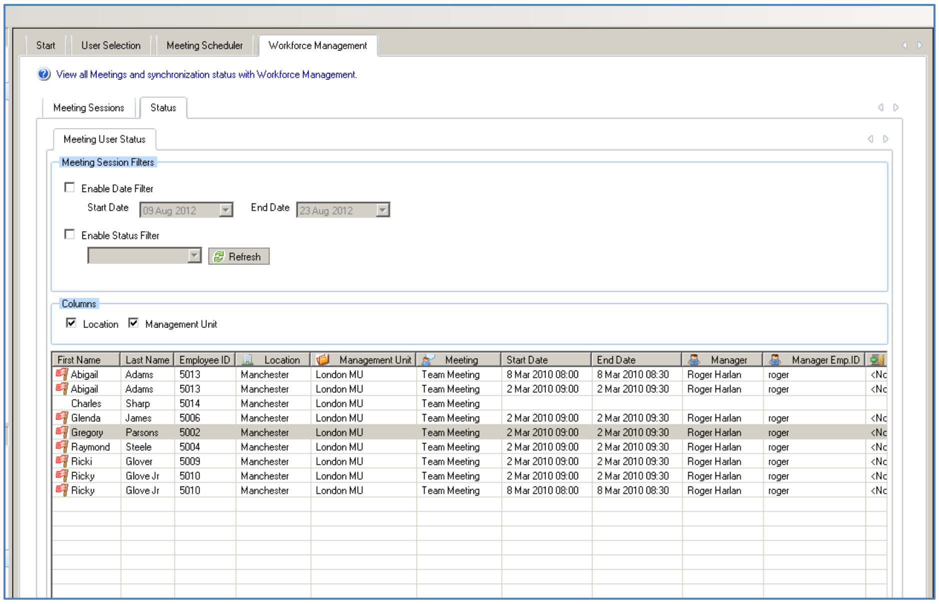



Figure 141: Display of scheduled meeting report

The Meeting Session Detail is also available, as when creating training sessions.

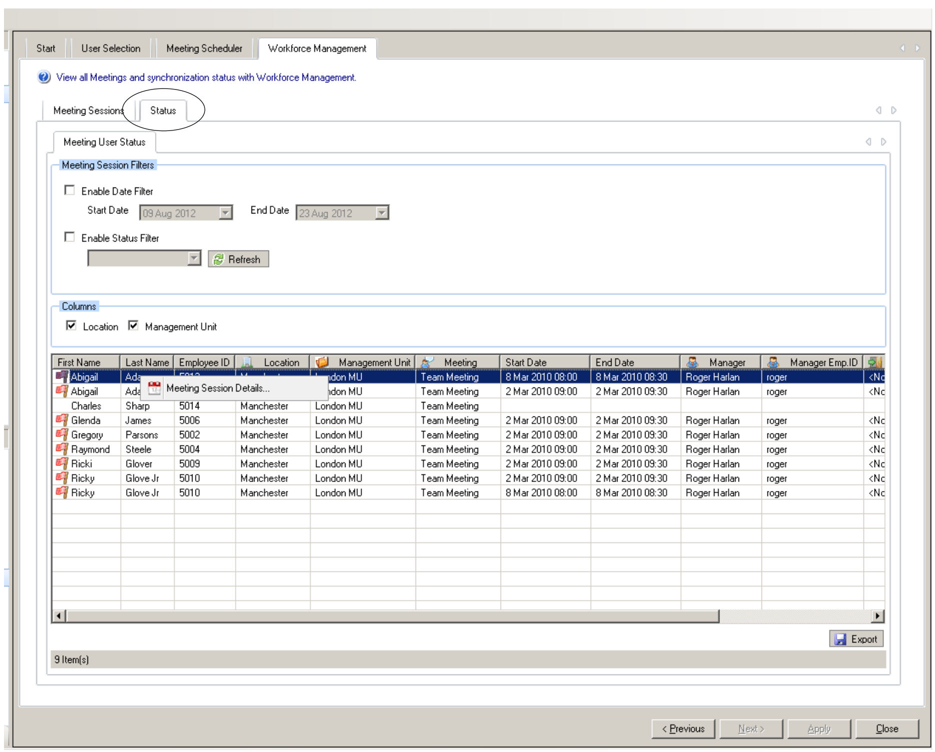



Figure 142: Meeting session details

There is also the option to remove the exceptions and keep the meeting sessions that have already been created, rather than removing the exceptions by deleting the meeting or training requests.

Once the sessions have been committed, click **Close** to close the meeting session template.

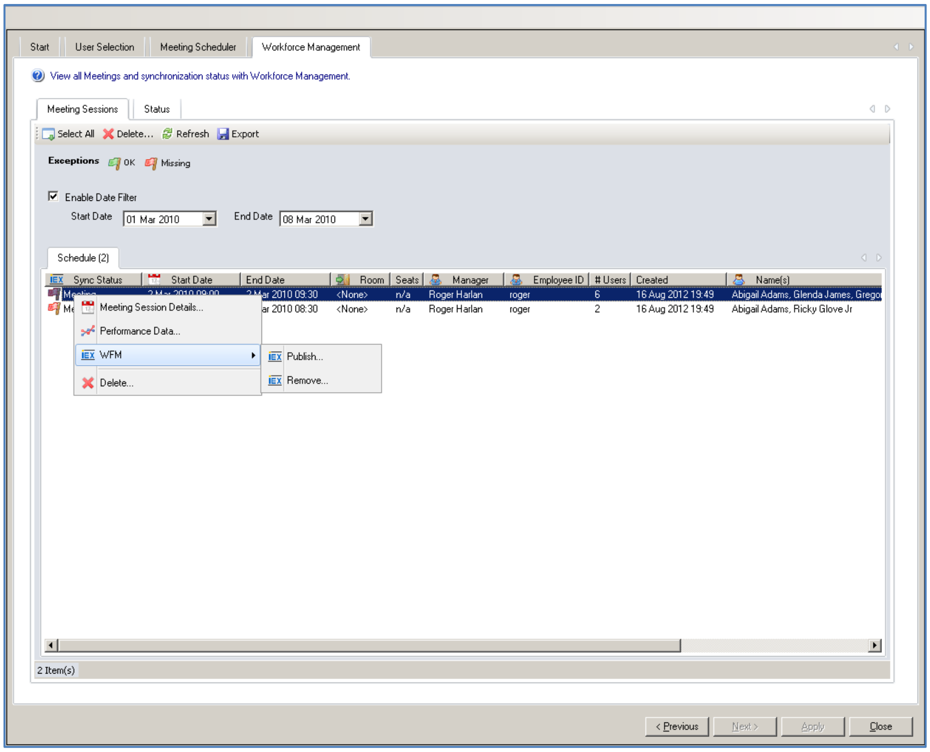



Figure 143: Closing the meeting session template

After closing the meeting request template, the meeting session now appears in the Meetings window, as in the example below.

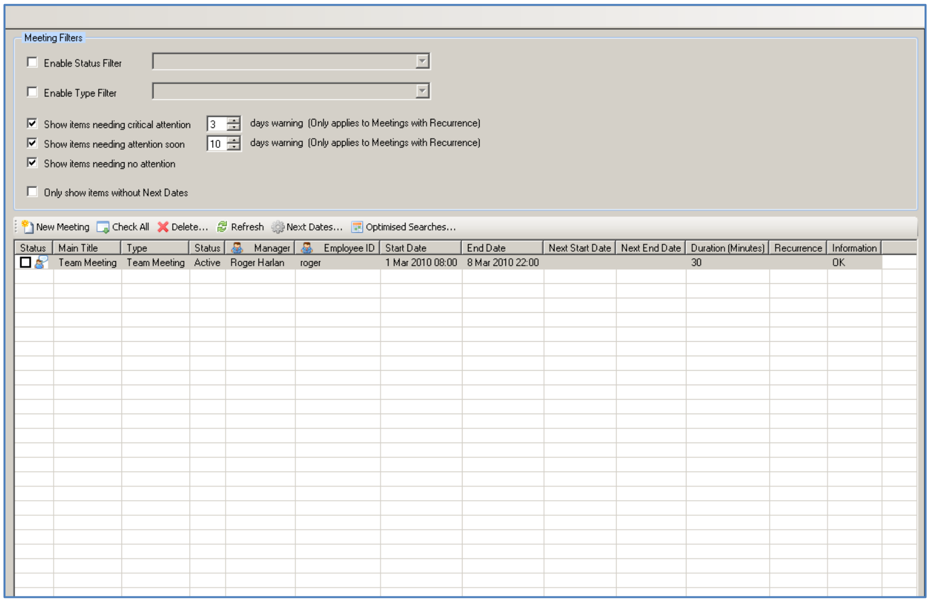


Figure 144: Display of the created meeting session

## 13.2 Duplicating a Meeting

Once a meeting has been created, it can then be copied over to other teams using the same format (this can be edited once created if required). Right-click the meeting request and select **Duplicate meeting...** from the available menu options.

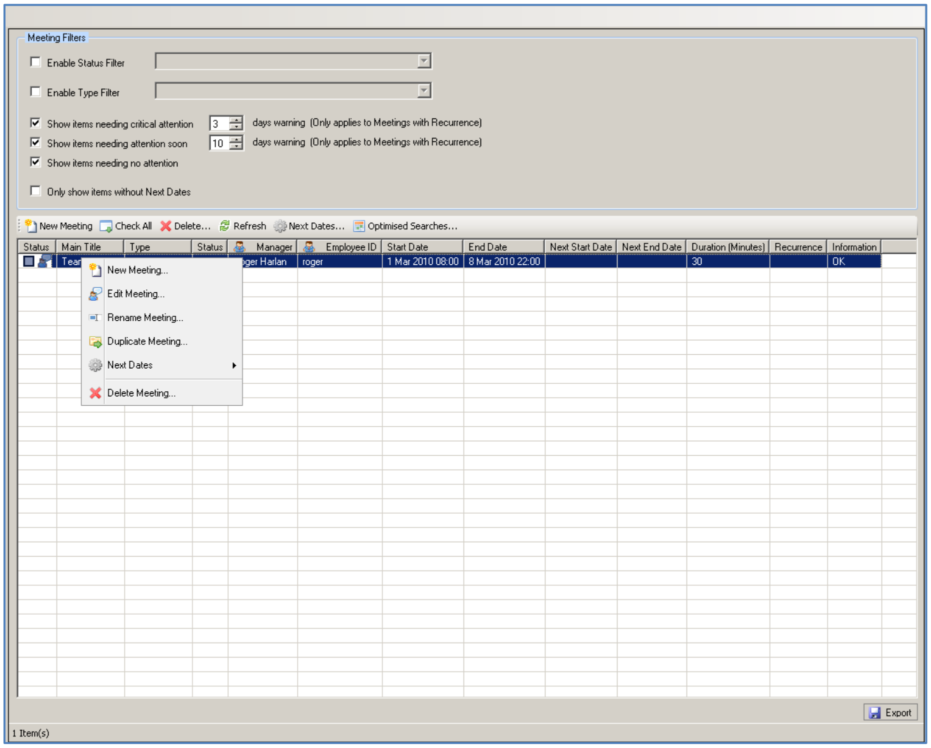



Figure 145: Copying a scheduled meeting to other teams

The **Duplicate Meeting** window from WFM appears, allowing you to select the users you want to create duplicate meetings for. You will be given the option to create a new meeting for each team with users selected or a single meeting containing all selected users.

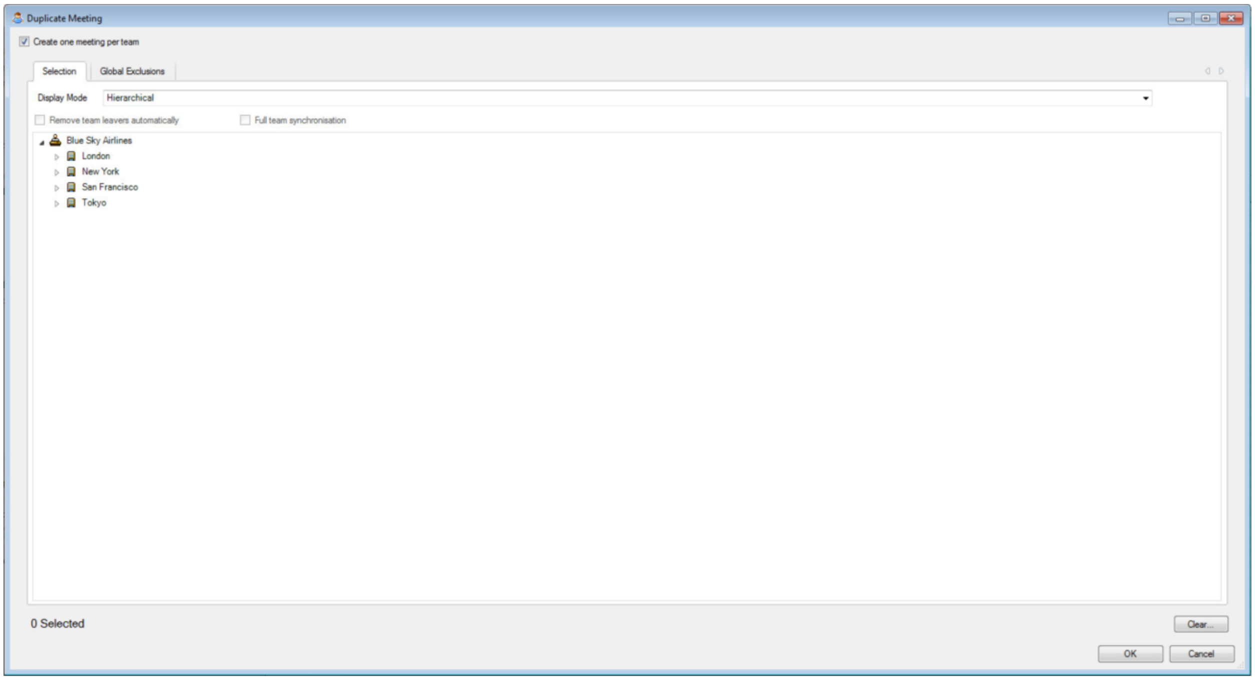



Figure 146: Copying a scheduled meeting to other teams

By default, the main title shows as **Copy of Team x Monthly Meeting**.

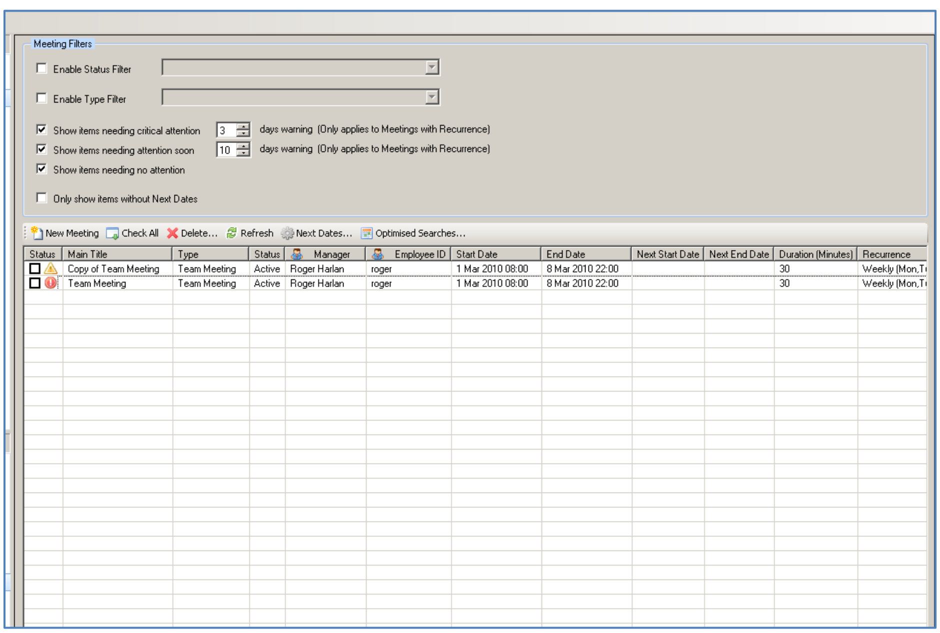



Figure 147: Output of copying a meeting to another team

The main title can be changed by either double-clicking the main title team name, or by right-clicking and selecting **Edit Meeting...** from the available menu options.

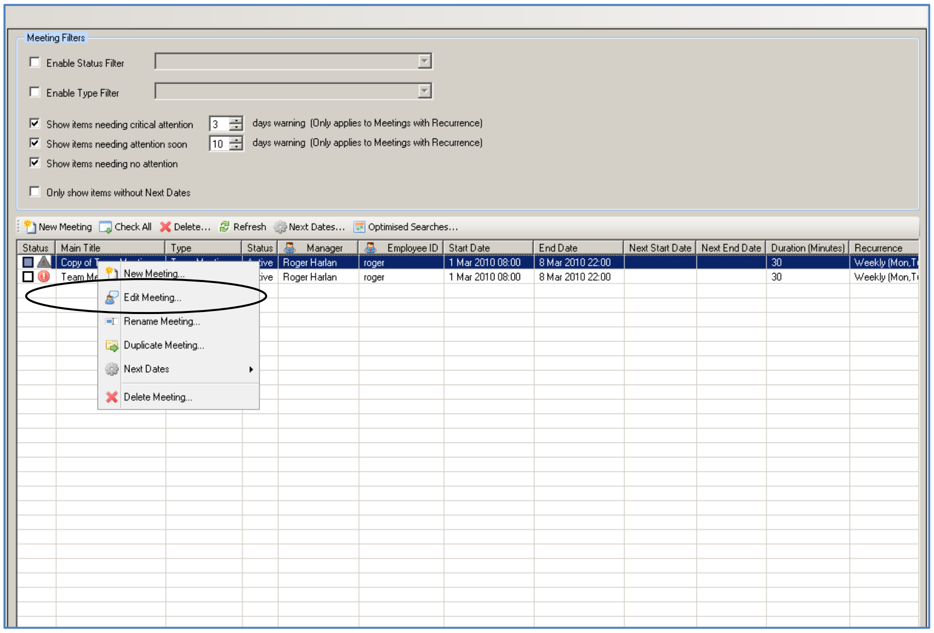



Figure 148: Editing the details of the copied meeting

Once the meetings have been created and renamed accordingly, they need to be scheduled. This can be done by first selecting the required meetings by checking the boxes to the left and then selecting **Optimized Searches...**

The **Meeting Scheduler Options** message appears, as in the example below. By leaving **Automatically Publish Exceptions to WFM for all Meetings** selected, the meetings will be scheduled using the exact criteria specified in the original meeting, and the exceptions will be committed to WFM.

If the meetings are to be visible in the Web Portal make sure that the status is changed to **Active**.

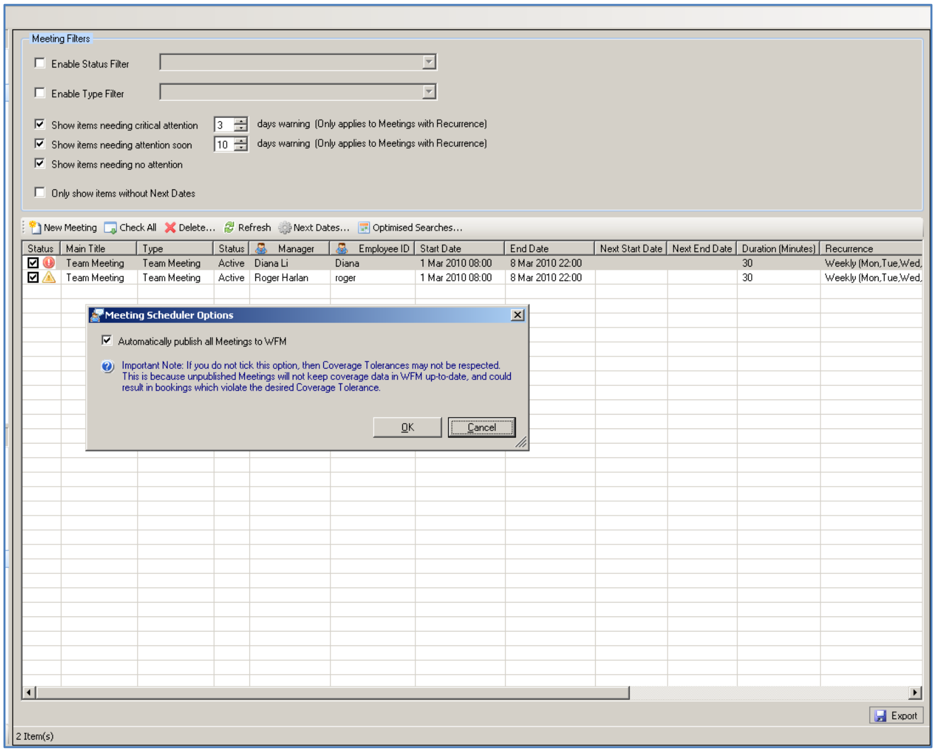



Figure 149: Meeting scheduler options

Once the optimized search has been completed the schedules can be viewed by double-clicking the required meeting to reveal the meeting template, and then selecting the **Workforce Management** tab to view the scheduled sessions. As the flags are green, the exceptions will have been committed to WFM.

To exit the meeting template, click **Close** at the bottom of the window.

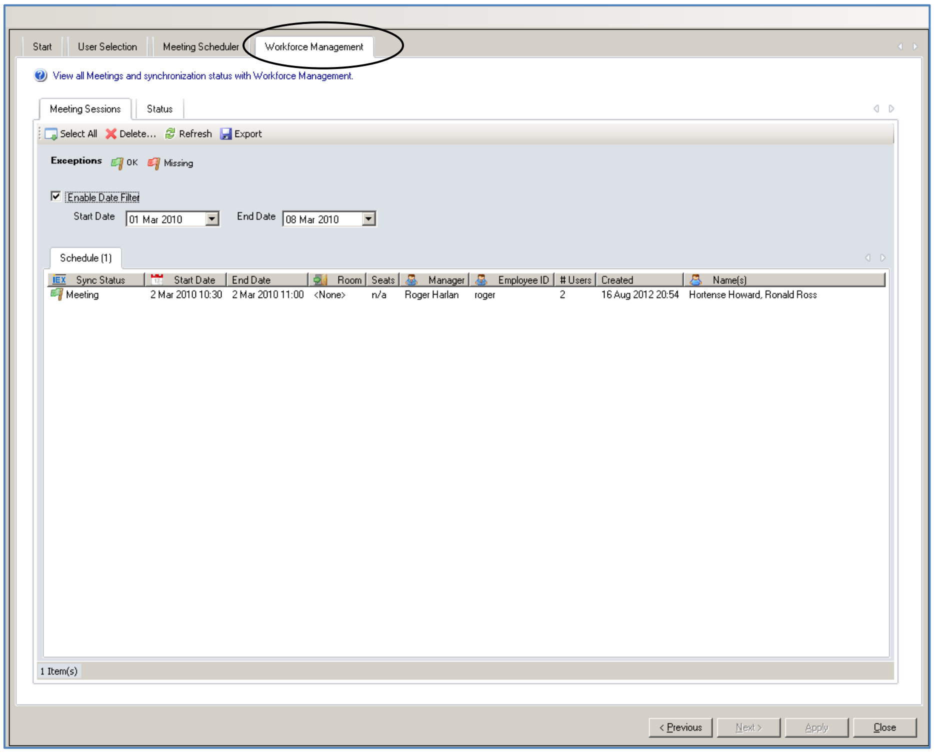



**Figure 150: Workforce management tab**

There is an option to export the meeting session detail.

Within **Tooltip** is an indicator of whether the exceptions are OK in WFM. If any exception has been altered in WFM, the tooltip will reflect this.

## 13.3 Group Scheduling of Recurring Meetings

Once the team meetings have been created they can be rolled forward in groups rather than having to create each meeting for the following month individually or manually.

Select the required meeting by checking the boxes to the left, and then click **Next Dates**. The **Meeting Next Dates** message box will appear, as in the example below.

There are three options available:

- **Suggest Next Dates for all selected meetings** – by selecting this option, Training Manager will roll the dates forward using the date range of the current start and end dates. For example, if the dates are currently for one month, then Training Manager will suggest dates for one month for the next month.

- **Clear suggested Dates for all Meetings** – this will clear any next dates created.
- **Apply Next Dates for all selected Meetings** – this will update the start and end dates with the next suggested meeting dates by replacing the current dates with the new dates.

To create the next period meetings, select Suggest Next Dates for all selected Meetings, and then click OK.

**Note**: If the date range-end date of the original meeting is in the past then Training Manager will set the Suggested Next Dates to start from tomorrow in order to prevent a new meeting being scheduled in the past. The duration of the window will be the same as the original meeting's.

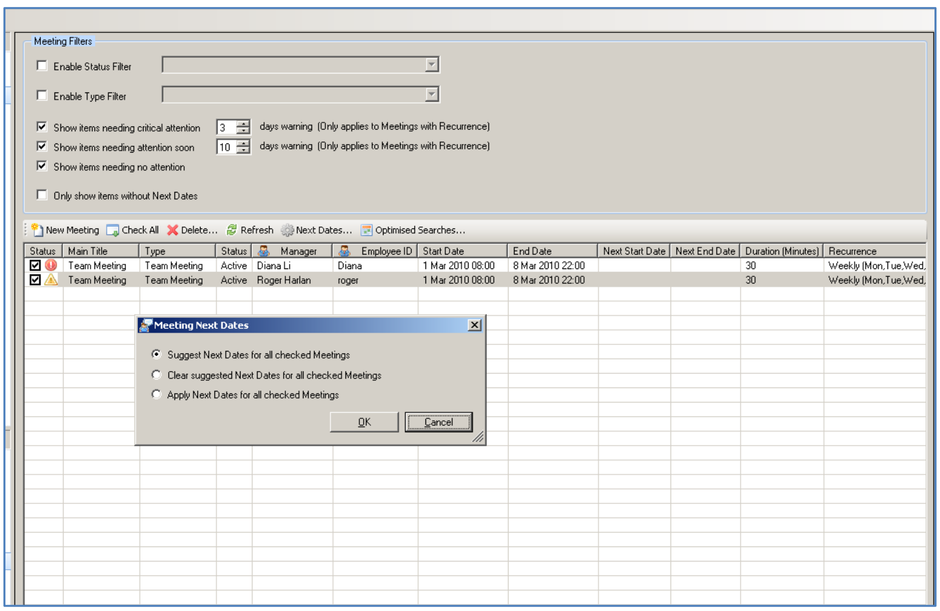



**Figure 151: Meeting next dates message**

The new suggested dates will then appear under Next Start Date and Next End Date.

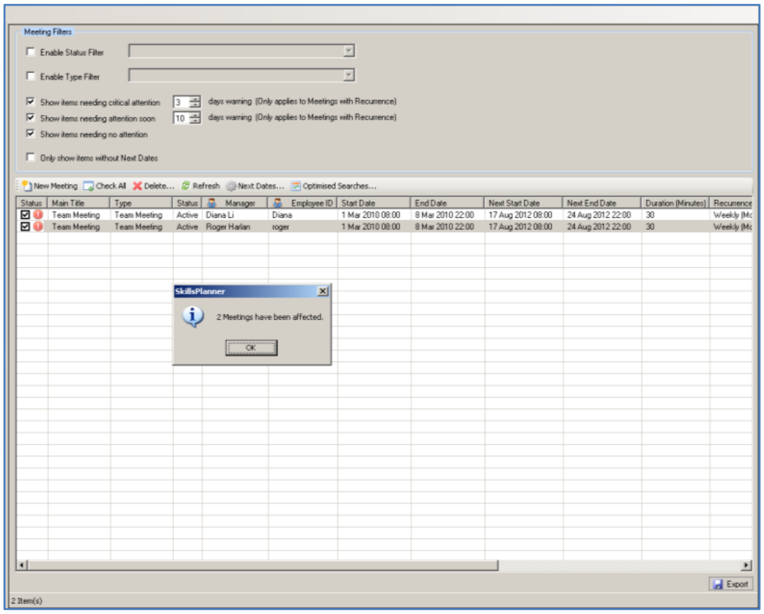



Figure 152: Suggested next meeting dates

If the meeting dates suggested are correct, select Next Date again, and then select the option Apply Next Dates for all selected Meetings.

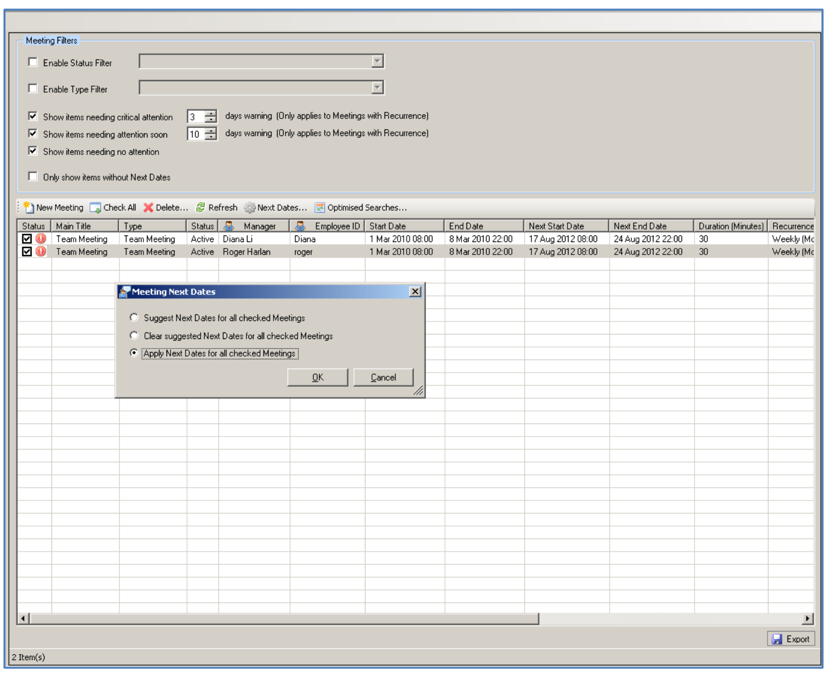



Figure 153: Confirming next meeting dates

The new dates will now replace the previous dates under Start Date and End Date.

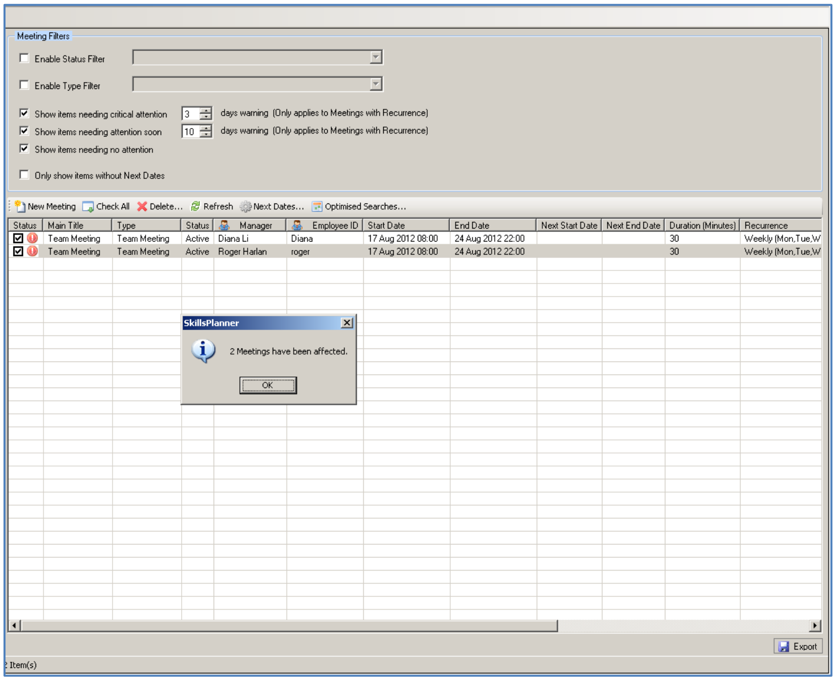



Figure 154: Confirming changes to meeting start and end dates

Once the dates have been updated, click **Optimized Searches...** and Training Manager will use all of the criteria in the meeting request templates to schedule the meetings as required.

Checking **Automatically Publish Exceptions to WFM for all Meetings** will publish the exceptions to WFM, and by having the status as **Active**, the meeting sessions will appear in the manager and agent's web portals.

There are filter options available on the **Meeting Filters** screen to reduce the number of meetings visible and to serve as reminders:

- **Enable Status Filter** – meetings can be viewed based on the status, for example, **Pending Approval**.
- **Enable Type Filter** – this is based on meeting type, for example, **Team Meeting** or **One-to-One**.

The **days warning** filters are used where the currently scheduled meeting is within x days of the end date, and the meeting is recurring and needs to be scheduled for the following month. This allows only those meetings that need attention to be visible.

### 13.3.1 Selecting next dates for multiple meetings

The select next dates option within the meetings screen includes the ability to set the next start and next end dates for multiple sessions. To use this feature:

1. Check one or more meetings from the meetings table.
2. Click the Next dates button at the top of the table.
3. Click the Select next dates option.
4. Select the next start and end dates via the two date pickers.
5. Click OK.

Training Manager will then update the next dates for all selected meetings to the selected date range. The start and end times will be set to match the times specified in the original meeting.

**Notes**:

- It is not possible to set either a next start or end date that is in the past.
- If the original meeting start and end times were both set to 00:00 (midnight) and a single day next dates window is selected (i.e. both start and end dates are the same day), Training Manager will update the end time to 23:59. However, if the start and end dates are different the times specified in the original meeting will be applied.

# 14 Scheduling exceptions over exceptions

Previous versions of Training Manager supported the ability to publish training and meeting sessions to WFM that interrupted activities (but not exceptions) in Genesys WFM. Training Manager supports the ability to interrupt both activities and exceptions when publishing training and meeting sessions to WFM.

**Notes**:

- If a training/meeting session is published over another exception and then removed, the removed portion will not be replaced.
- It is not possible to interrupt an exception that was published via Training Manager.
- Standard scheduling rules, service level calculations and booking strategies still apply.

# 15 Timeoff

In Genesys it is possible to overwrite an exception with Timeoff. When this happens, the exception is still there, but because the agent may not be in work, they may not take their training. If viewing this in Training Manager, you will see a purple flag indicating any agents that have time off.

# 16 Marked Time

In Genesys it is possible to overwrite an exception with Marked Time. When this happens, the exception is still there, but because the agent may be working on a project or as Overtime, they may not take their training. If viewing this in Training Manager, you will see a blue flag indicating any agents that have Marked Time.

# 17 Meeting Team Synchronization

Training Manager supports synchronizing the team members automatically in cases where future meetings are based on an existing meeting and 'rolled forward' via the **Next Dates** feature rather than requiring meeting schedulers to manually synchronize teams. This can be achieved either by enabling WFM team synchronization (full-team or part-team) from the meeting **User Selections** tab, or by enabling the **HR link**.

There are two options available for WFM-based team sync:

- **Part team sync**: This option removes agents who are no longer members of the selected team from the meeting.
    - Scheduling a new meeting via **Next Dates** with only the part-team selection enabled will display a warning dialog if new users have joined the team since the previous meeting's user selection. The user will then have the choice of reviewing the user selection or confirming that the team synchronization feature should only remove the users who have left the team. No warning dialog will appear if no new users have joined the team and Training Manager will continue to remove agents who have left the team.
- **Full team sync**: This option removes agents who are no longer members of the selected team from the meeting and adds new team members who have been added to the team since the meeting was created in Training Manager.

To enable the *full* or *part team sync* functionality, create or open an existing meeting and select the **User Selection** tab. Ensure that the **Display Mode** is set to WFM Hierarchical. Select a team from the list by checking its associated checkbox. This will result in the **Remove team leavers automatically** (part team sync) and **Full team synchronization** checkboxes (under the display mode select box) becoming checked. If you wish to disable full team sync or enable only part team sync uncheck the **Full team synchronization** and (optionally) uncheck the **Remove team leavers automatically** checkbox.

### Notes:

- The team sync functionality is only available for meetings.
- The meeting team synchronization options (*full* or *part-team* sync) are a per-meeting setting.
- The *earliest start date* and *latest end date* window for meetings rolled forward via **Next Dates** will be set to either of the following:
    - The next calendar month if the original meeting's earliest start date was set to the 1st of the month and the latest end date was the last day of that month.
    - The number of days between the original meeting's earliest start date and latest end date.
    - If the previous meeting's latest end date is in the past the start of the new window for the roller forward meeting will be set to today.

- Training Manager will not continue to keep teams synchronized after the **Next Dates** feature has been used, that is, the team synchronization is performed at the time that the optimized search feature is used rather than continuously. It is possible for team members to move in/out of a team between the optimized search and the meeting occurring. Any such changes will not be automatically reflected in the new meeting's user selection.
- If all agents in the user selection have left the team, Training Manager will provide a warning that the new meeting will contain no users.
- As in previous versions, **Next Dates** can be run for multiple meetings by checking several meetings in the list. Each meeting's earliest start date and latest end date windows will be calculated, optimized searches performed and published one after the other. As a result, the time slots booked by meetings that are searched first will not be available for those that are run later. The order in which new meetings are processed is not based on the order in which they appear in the list of meetings.
- Recurrence rules depends on the **Next Dates** feature, that is, recurrence rules will be applied in the new window calculated when the user selects **Next Dates**. Recurrence attempts to schedule multiple sessions within the window defined. If recurrence is set to a large window, **Next Dates** may not schedule any meetings due to the recurrence rules. For example, a meeting set to recur every month with the next dates window being set to 2 weeks will only search (and publish) a new meeting every other time that the **Next Dates** option is used (unless other restrictions prevent it from being scheduled).

Selecting users from multiple teams in the **User Selection** section will disable the team synchronization options.

# 18 Team Based Scheduling

When scheduling training activity that requires the teams to be scheduled together create the training request as normal up to the Training Events tab as per the example below.

Select **Keep team together** and the **Optimised Search Algorithm** will keep the team members together.

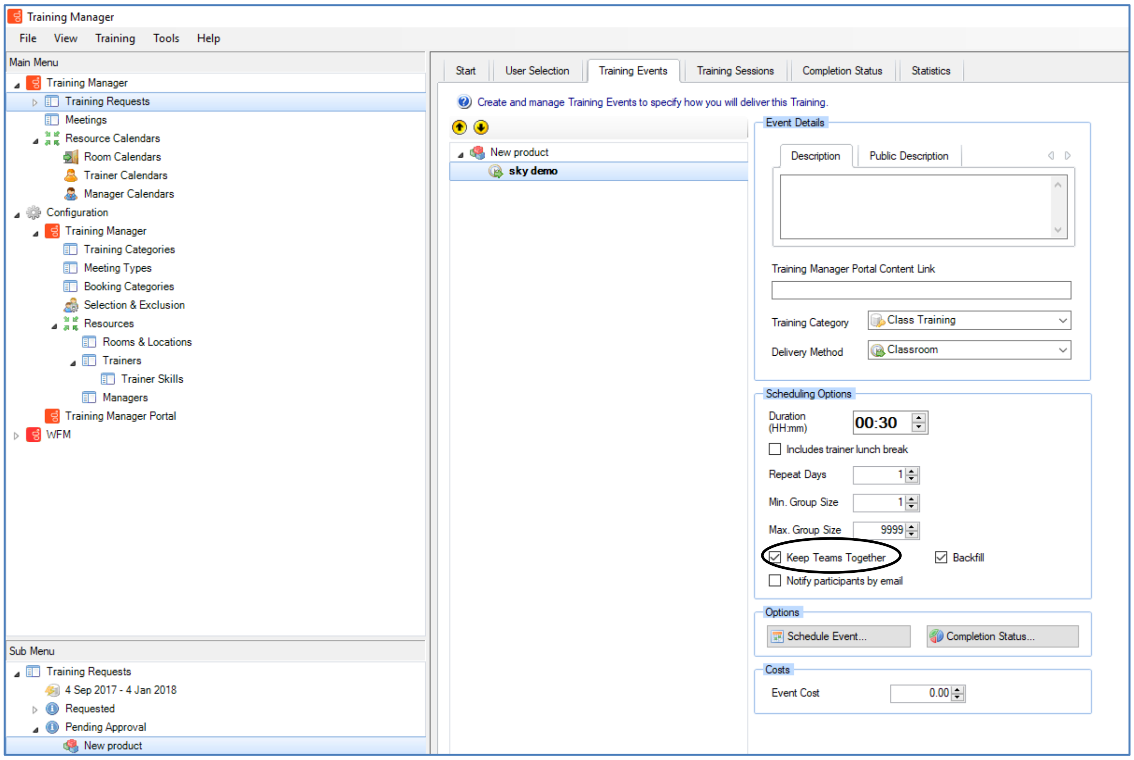



Figure 155:Team based scheduling of training events

This will also be visible in the Scheduling Options tab.

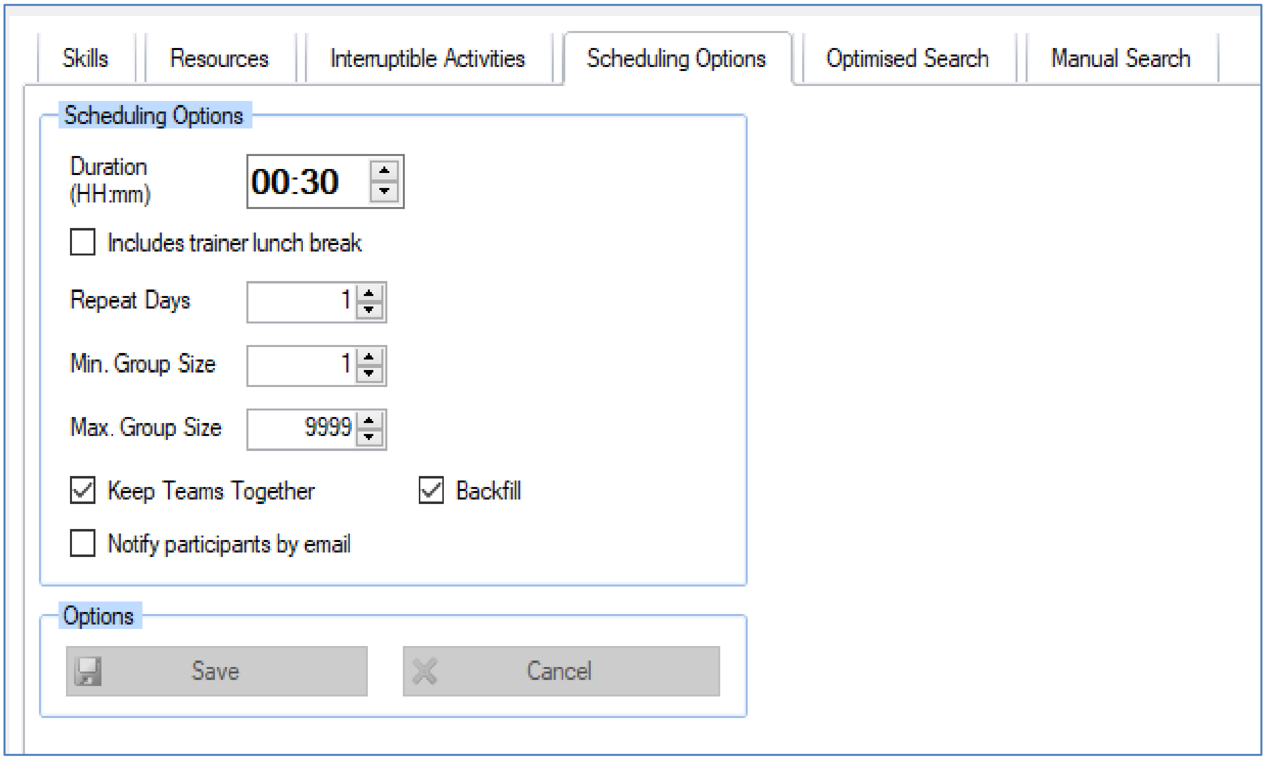



Figure 156: Setting the team-based scheduling option

Training sessions will be created around the minimum and maximum numbers of delegates required. View the training session details to confirm that the teams have been scheduled together as required see the example on the next page.

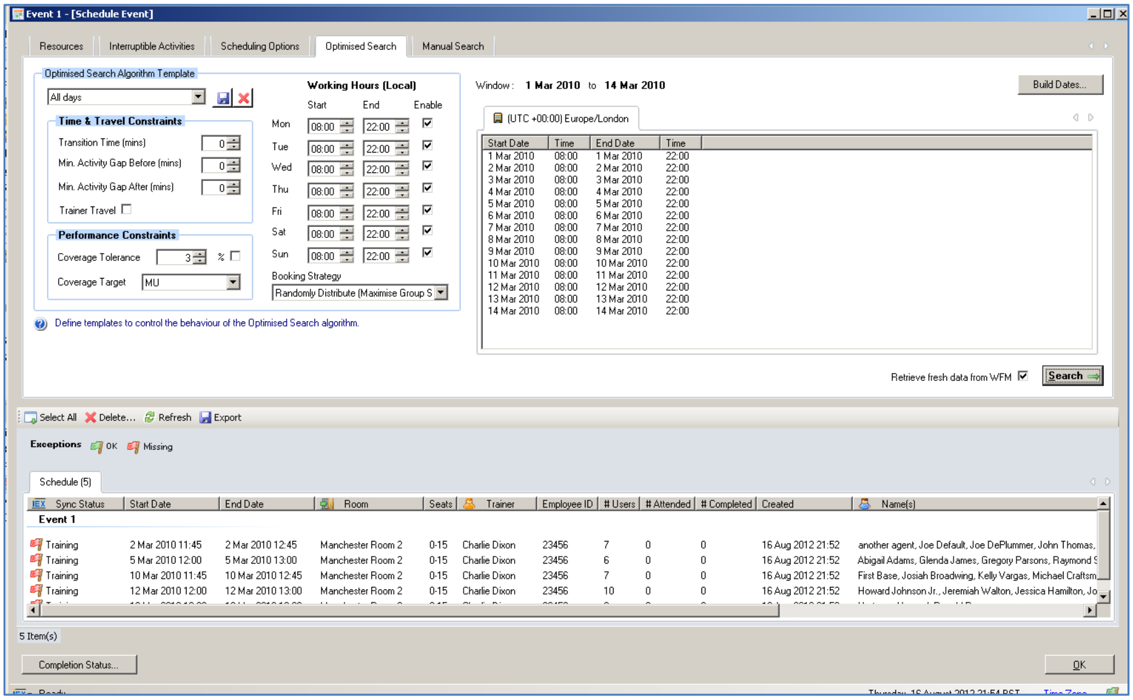


Figure 157: Display of training session details

In this example only Team 1 members have been scheduled for this training session.

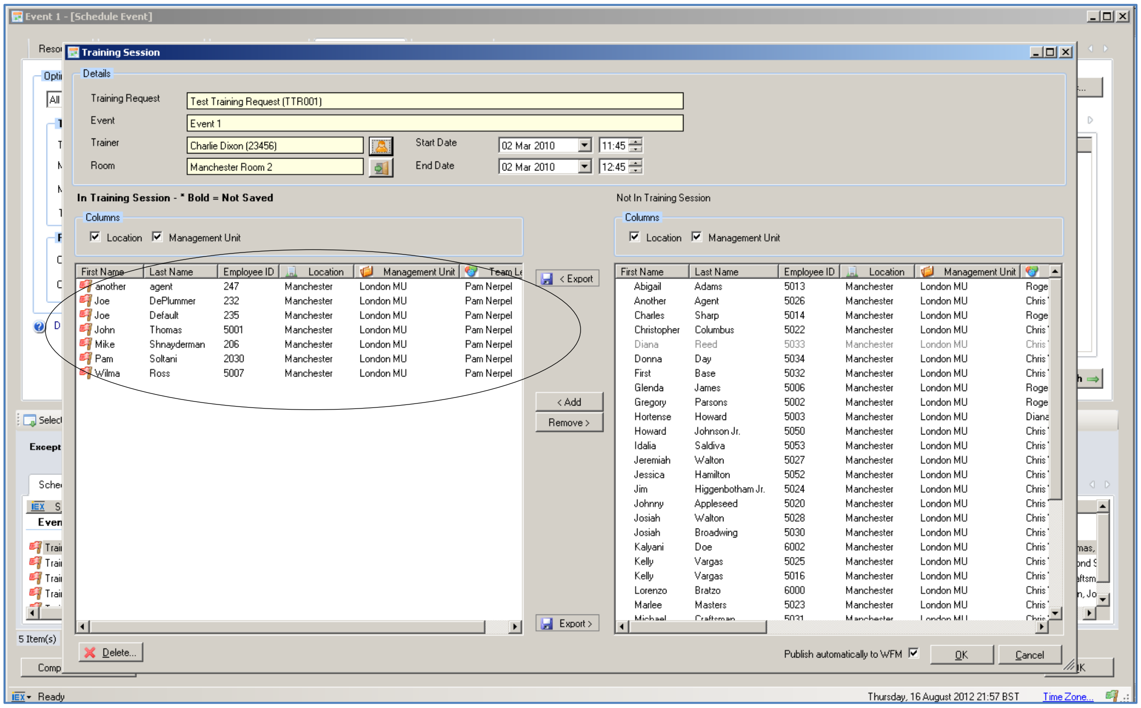


Figure 158: Example of scheduling a team for a training session

# 19 Training Manager Outlook Integration

Training Manager includes new Outlook integration features that support the automated sending of email notifications to meeting/training session participants. It is also possible for users to download Outlook appointment (ICS) files from Portal for any event they are set to attend.

## 19.1 Portal iCalendar File Download

Users logging in to Portal are now able to download an iCalendar (.ICS) appointment file via the **Add to Calendar** link for any meeting/training session that they are expected to attend. This will result in the download of an ICS file which can be opened in Microsoft Outlook and saved to the user's calendar.

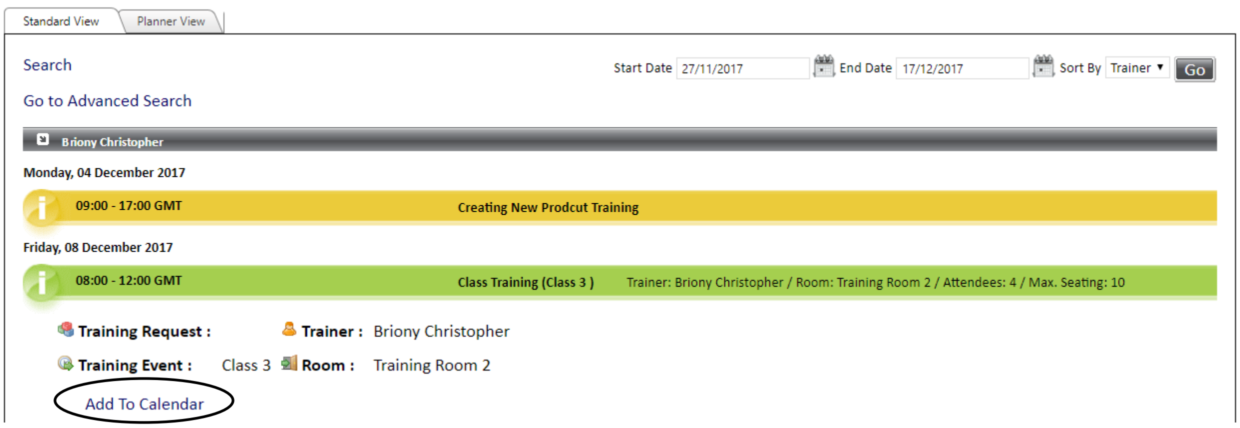



Figure 159:Add to Calendar link in Portal

**Note**: The cancellation of a training event or meeting will not result in an update/cancellation to the appointments saved by attendees.

## 19.2 Training Manager iCalendar email notifications for meeting/training session attendees

The Training Manager meeting and training scheduler functionality now includes the ability to send email notifications to session attendees. When a meeting/training session is published with the "Notify participants by email" option enabled Training Manager will retrieve attendees' email addresses from WFM and send an email containing an iCalendar (.ICS) appointment. The appointment file will include the details of the training/meeting session. Attendees can then save the appointment to their Outlook calendars. If the training/meeting session is later removed from WFM Training Manager will automatically send cancellation notification emails to attendees.

### 19.2.1 Email Notifications: Meeting Sessions

To enable email notifications for a meeting select the meeting from the Meetings Sub Menu. Check the **Notify participants by email** checkbox from the meeting's start tab. Continue through the user selection and meeting scheduler tabs as normal. Publishing sessions that were found via optimised or manual searches will result in Training Manager sending meeting notification emails to the attendees. Removing

the meeting from WFM via Training Manager will result in cancellation emails being sent to the attendees.
**Notes:** Removing the meetings directly in the WFM will not result in cancellation emails being sent to the attendees.

Possible meeting sessions that have not been published will not result in meeting email notifications being sent to the list of attendees.

Emails will only be sent for sessions that are published to the master schedule (emails will not be sent for sessions that are published to scenarios).

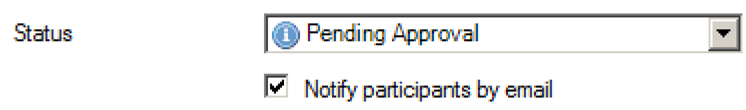



Figure 160: Notify participants by email option

### 19.2.2 Email Notifications: Training Sessions

To enable email notifications for a training request, open the training request from the Training Requests Sub Menu. Select the Training Events Tab. Check the **Notify participants by email** checkbox from the **Scheduling Options** section and apply changes. Continue to schedule the event using optimised or manual search as normal. Publishing sessions to the WFM will result in Training Manager sending training request notification email to attendees. As with meetings, removing published training sessions from WFM will cause cancellation email notifications to be sent to attendees.

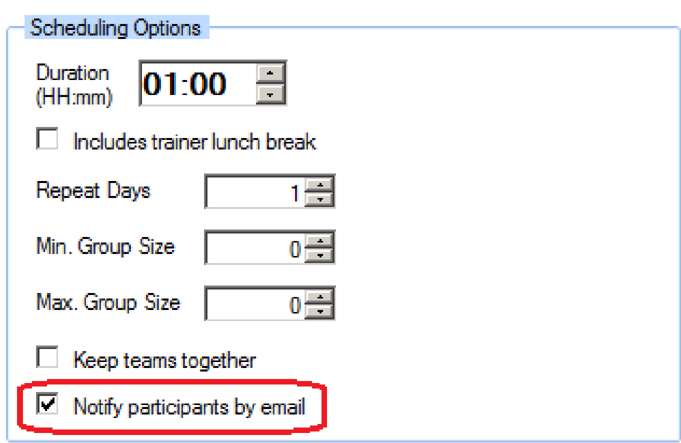



Figure 161: Example of scheduling a team for a training session

To import downloaded ICS file attendees should:

- Ensure that the exported ICS file is on a computer with Microsoft Outlook 2010 or later installed.
- Run Outlook.
- Double-click the ICS file.

- Accept the appointment to add it to the calendar.

**Feature notes and caveats:**

- If a meeting/training session is published then edited so that the **Notify participants by email** option is disabled, removing the session/sessions from WFM will still result in cancellation email notifications being sent to attendees.
- For training requests, the option to enable the **Notify participants by email** feature is also accessible from the **Schedule Event** screen in the **Scheduling Options** tab.
- Only agent attendees are emailed notifications for meeting/training sessions. Managers and trainers will not receive email notifications.
- Attendees receiving ICS files require Microsoft Outlook 2010 or later.
- Agents need to have their email address setup in Performance DNA in the first instance,
    - If not, then agents must have correct email addresses set in their WFM user accounts.
- Sent emails will have their 'From' field set to the manager for meetings or to the trainer for training requests. If no trainer is selected for a training request a default configurable email address will be used. Please see the installation/upgrade guide for configuring this email address.
- **Email notification content will include the following information:**
    1. Event title
    2. Event type
    3. Date & time of meeting/training session
    4. Location & room (if set)
    5. Trainer name & email
    6. Description & objectives
    7. Event public description
    8. Content link
- ICS files produced by Training Manager do not support recurrence rules, e.g. recurring meetings will result in multiple individual event ICS files being available in Portal.
- ICS files produced by Training Manager do not support reminders in Outlook.

# 20 Reports

The following reports are available in Training Manager.

## 20.1 Training Request Completion Report

In the **Training Events** window, information is presented in tabular and gauge format to track the number of agents that have completed the training against the requirement.

Select the individual training request from the **Sub Menu**. Clicking the training request name displays a view similar to the example below.

The gauge will give a visual representation of how near to completion the training is. The information is presented in a table format on the right-hand side.

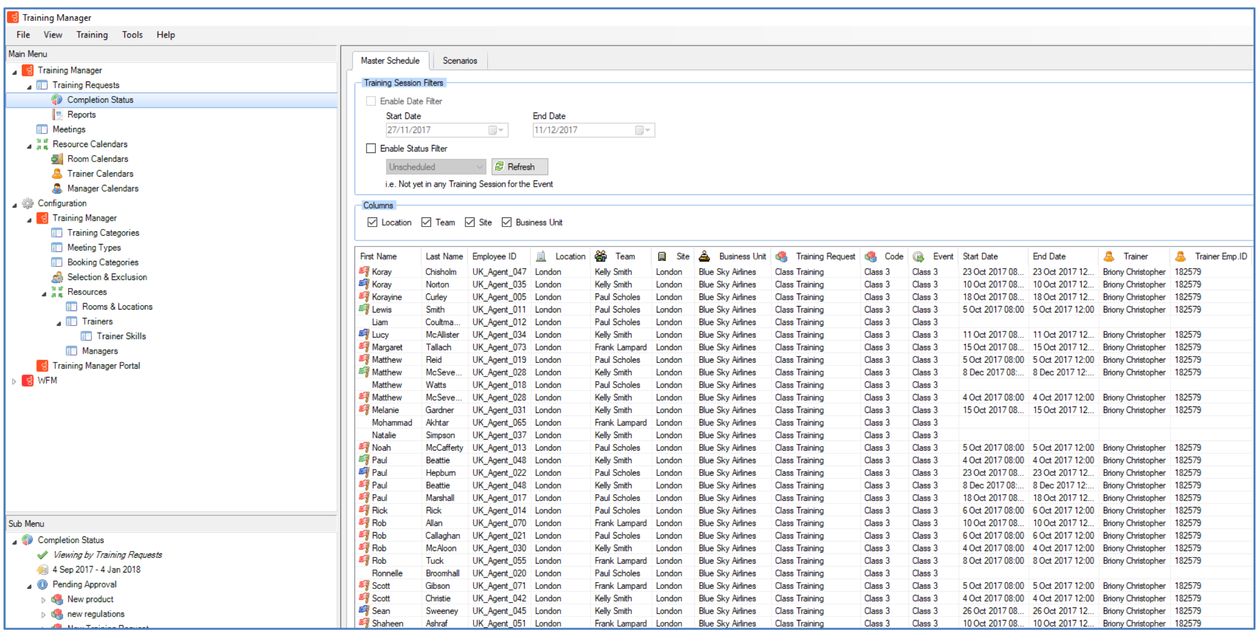



Figure 162: Training request completion status

## 20.2 Training Summary by Status Report

An overall summary report is available, by status, for each of the training requests.

When you click the actual status— for example, **Active** or **Completed**—a summary appears for each of the training requests within that file, similar to the example below.

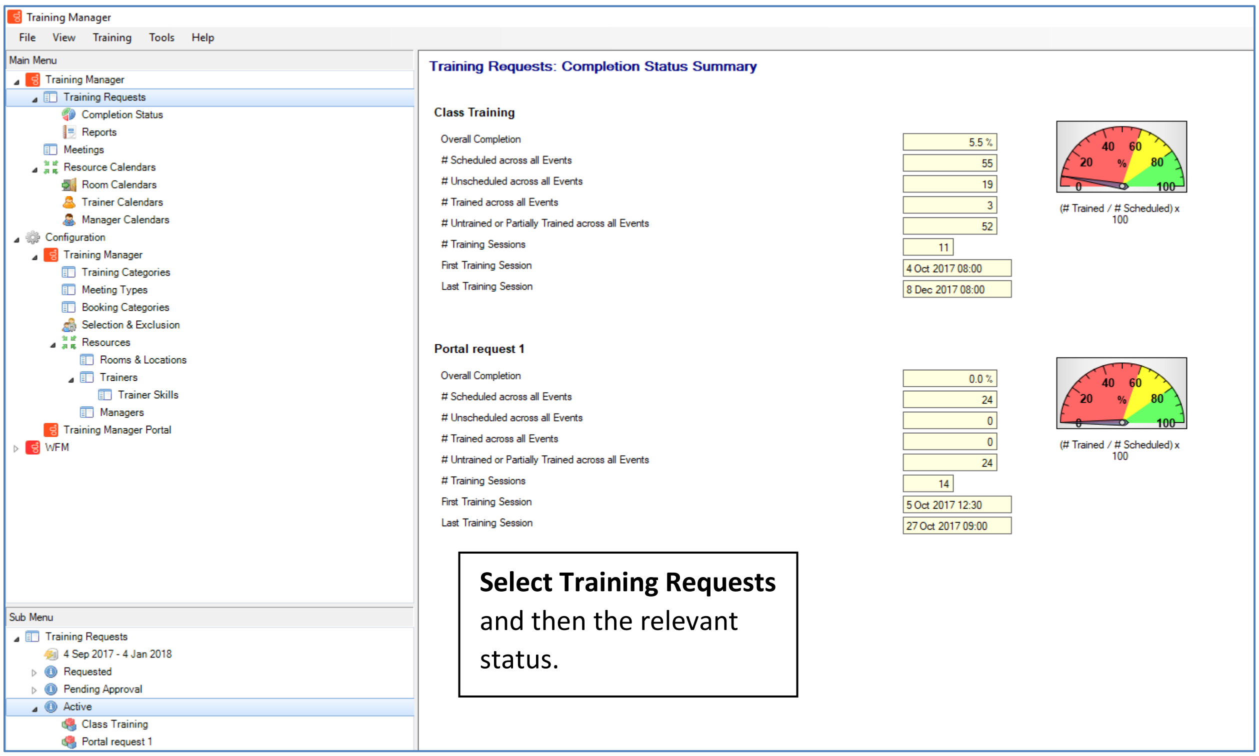



Figure 163: Summary of training requests

## 20.3 Agent Detail Completion Report by Training Event

A Completion Status report for the training event is available that lists all of the agents assigned to attend training.

This report is available by selecting **Completion Status** found underneath **Training Requests** in the **Main Menu** window.

Select the relevant status, and then expand the view to locate the relevant training request in the **Sub Menu**. Selecting the last option displays a list of all of the agents that were selected for training. This view can also be filtered by either clicking at the top of the column heading, and/or using the available filters; for example, **Enable Status Filter**, or **Enable Date Filter**.

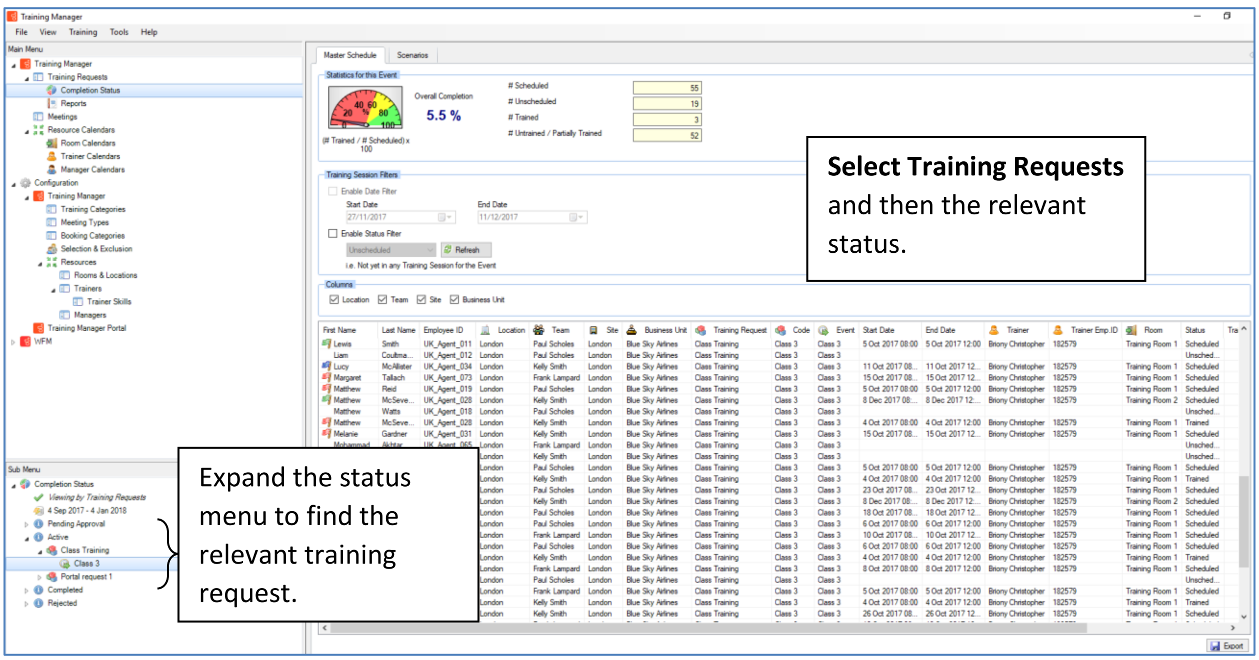



Figure 164: Completion status report

## 20.4 Completion Status Report

Report information can now be viewed at a higher level than selecting the individual training request.

Select the **Completion Status** option on the **Main Menu**. The report template appears in the main window. The option to filter by the following options is then available:

1. Status of training session; for example, **Pending Approval** or **Active**.
2. Course Code
3. Date
4. Training status; for example, **Missed** or **Scheduled**.

The information can be filtered further by the **Location**, **Team**, **Site** and **Business Unit** as usual.

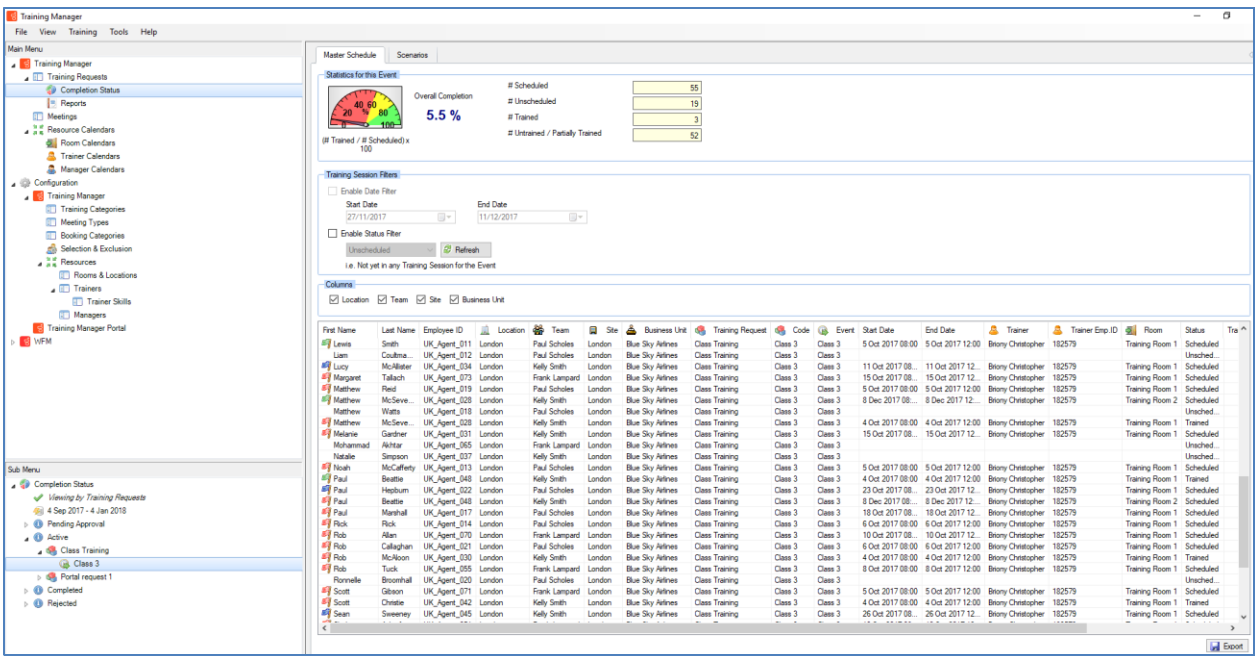


Figure 165: Completion status report

Individual Agent Training Summary Report

This reports individual agent activity across all of their scheduled training.

Expand **Selection & Exclusion** in the **Main Menu** window and then expand the MU's and Agent Groups to select the required individual. Right click on the individual and select **Completion Status.**

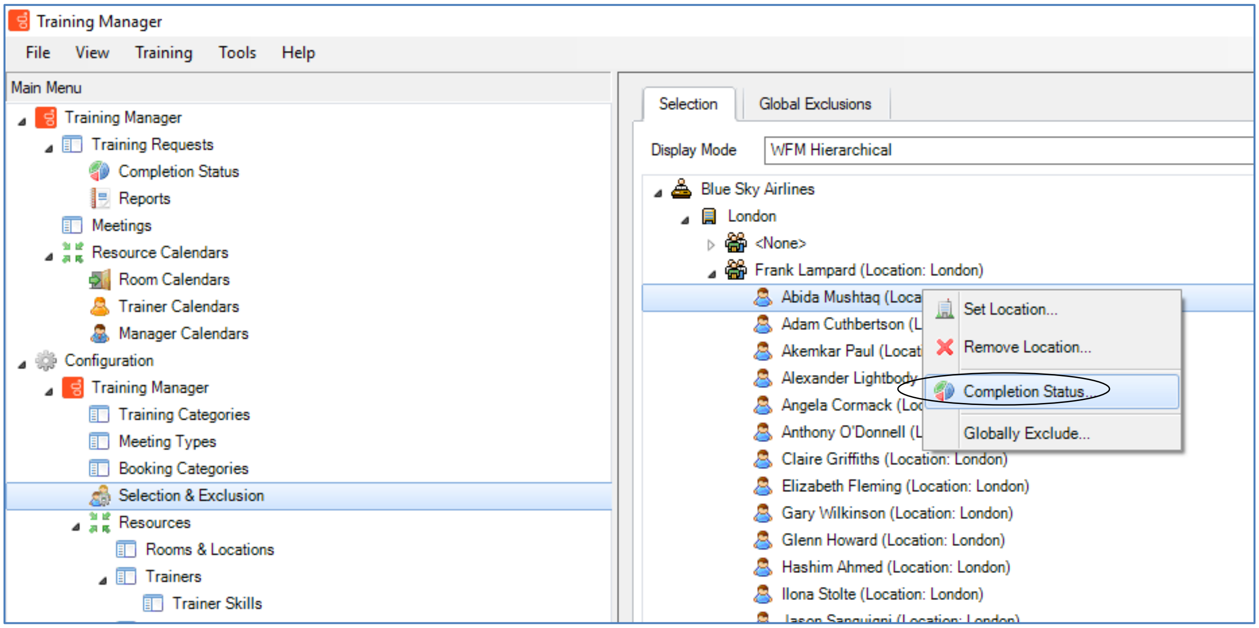



Figure 166: Individual agent training summary report

This will reveal any training activity within the date range. The list could contain sessions that the individual was scheduled for or training that the individual was selected but not scheduled.

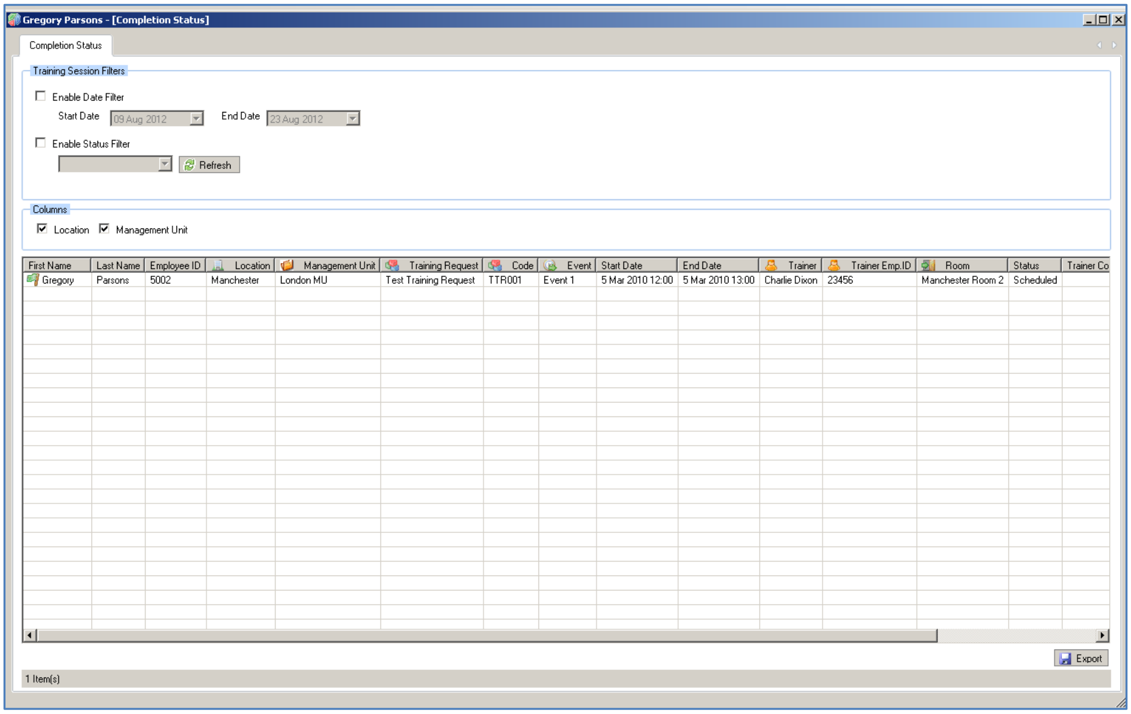


Figure 167: Individual agent training summary report

## 20.5 Training Overview Report

This report is available by expanding **Training Requests** in the **Main Menu** and selecting **Reports**.

Select the required report from the **Report** drop-down menu. Change the date range in the **Start Date** and **End Date** fields if required, and then click **Refresh**.

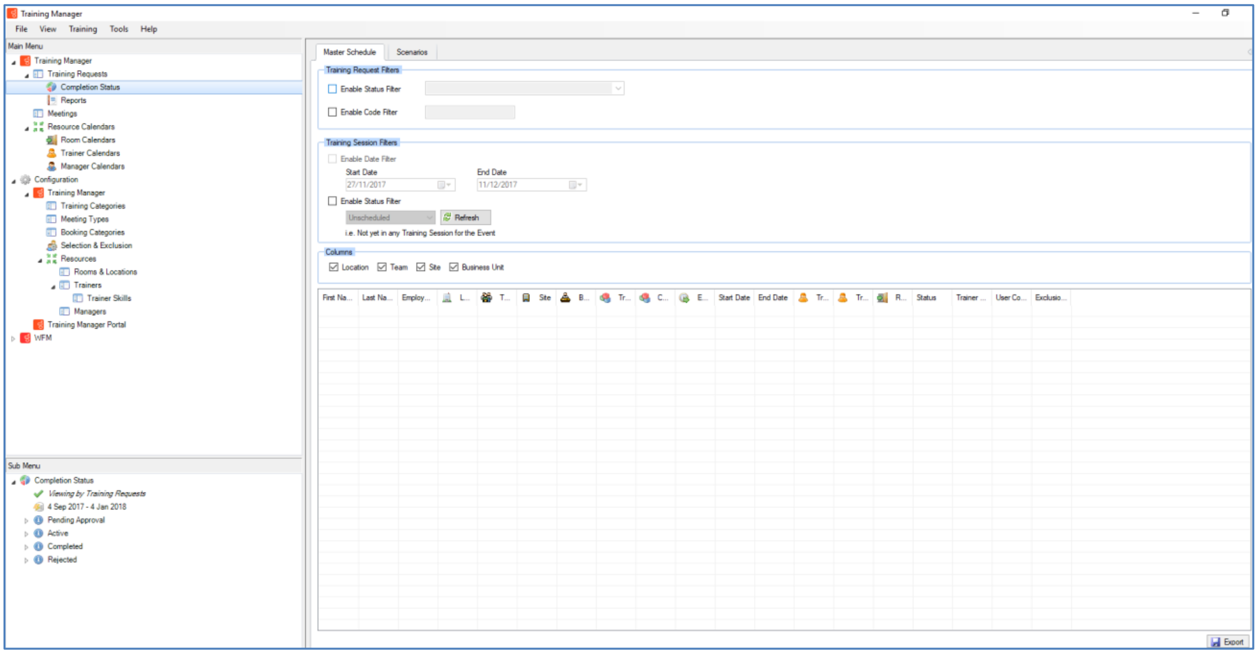



Figure 168: Training overview report

Any training activity in the selected date range will then be displayed.

This information can also be exported by clicking the **Export** button.

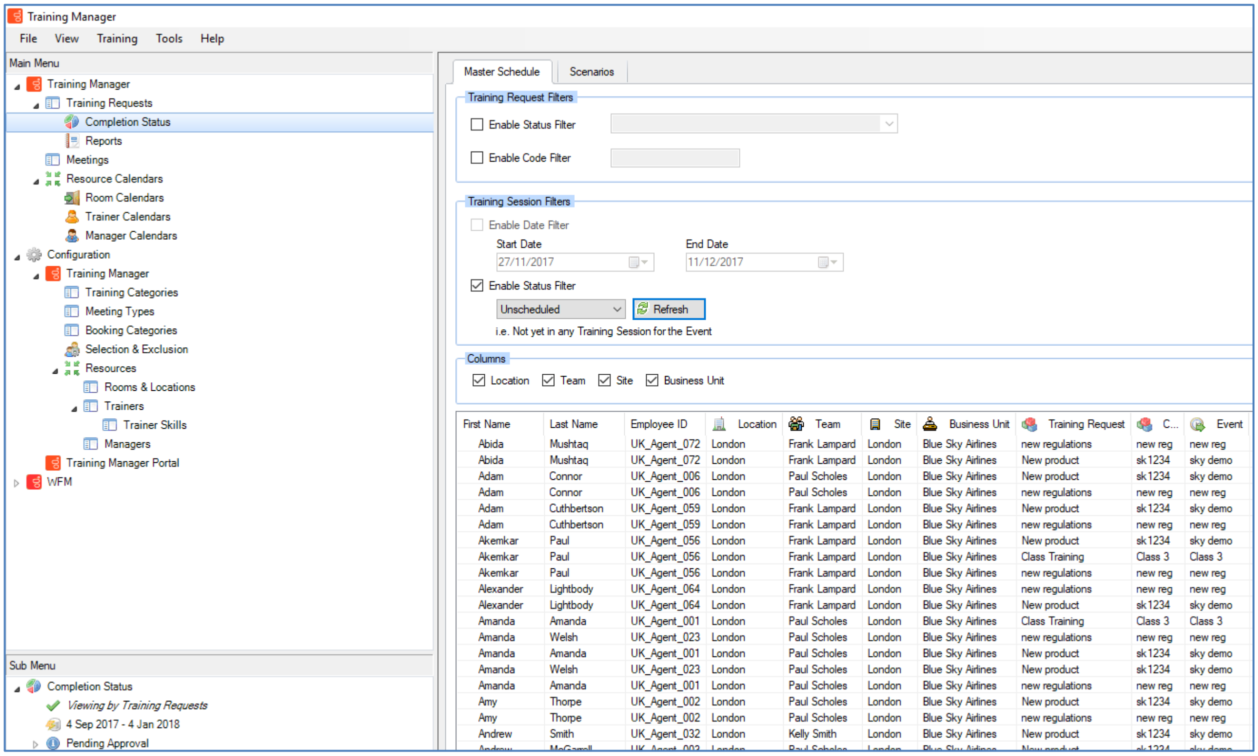



Figure 169: Exporting a training overview report

## 20.6 Multiple Trainer Courses Report

This report is selected in exactly the same way as the Training Overview, and will display any training activity where there have been multiple trainers in the required date range.

This information can be exported if required.

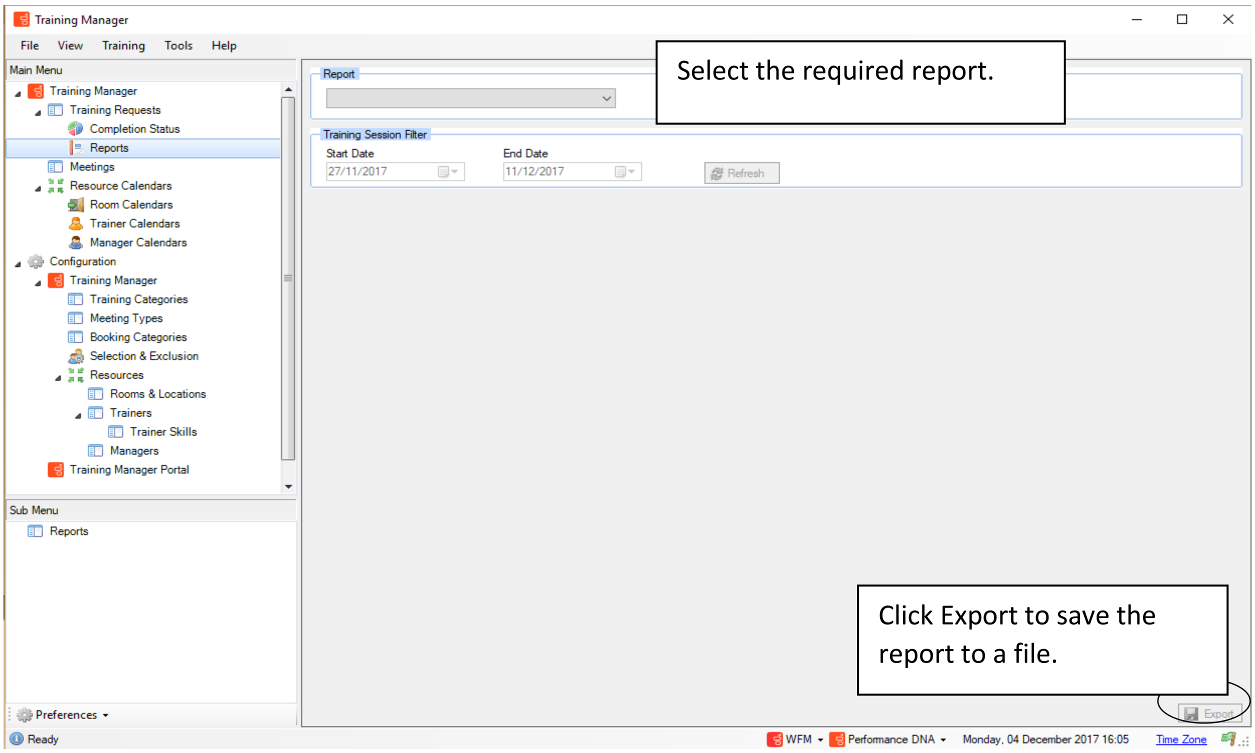



Figure 170: Viewing and exporting the multiple trainer courses report

# 21 Useful Tips

| | |
|---|---|
| When scheduling for a full day's training session there are no schedules created. | Check in Scheduler to make sure that breaks and lunches have been selected as interruptible. |
| No schedules have been created for certain agents even though they are in WFM. | Check in WFM to make sure that they are available. For example, that they have a schedule and are not on vacation or scheduled to do something else. |
| No schedules have been created even though the agents are available in WFM. | Check to make sure that the trainer(s) and the room(s) selected are available for the training window specified. |
| A trainer has been selected, but is only being scheduled from 11:00 and I need to schedule them from 08:00. | Check to make sure that their previous shift ends at the correct time and not 00:00 (midnight) per the 11-hours-between-working-shifts rule. |
| Overtime has been created to increase the number of agents available for training, but they aren't being scheduled. | Check in Scheduler to make sure that the overtime activity has been selected as interruptible. |
| Training Overview report is only exported into csv. | To view an exported Training Overview report in Excel, export it and save it as a csv file. Open Excel, and then open the csv document as "delimiter." This transfers the file into Excel. |
| One of the rooms previously used is now unavailable. | Select the room from within the **Resources** main menu option and deactivate it to make sure that it is not used in the future. |