

Skills Management 9.0.0

Training Manager for Genesys WFM Administrator Guide

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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.

Web Services URL	http://plannerserver/plannerservices/
	Location of the Web Services e.g. http://your-server/Services/
Proxy Server URL (Optional)	
	Location of your proxy server used for both Web Services and WFM APIs
Web Service Connection Timeout	25000
	Time (in milliseconds) to wait when connecting to the Web Services.
WFM Connection Timeout	25000
	Time (in milliseconds) to wait when connecting to WFM.
Web Service Authentication	Use NTLM (Integrated Windows Authentication)
	Leaving this unticked will assume Anonymous Authentication
	<u> </u>

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:

😴 Training Manager	×
Welcome to Training Manage	er
User Name:	
Password:	
OK Ca	incel
Configuration Deta	ails <<
WFM Server: wfmServer	
Host Name: demoserve.genesyslab	.com 🗸
Port : 5007	~
HTTPS Remember on succe	essful login

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.





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.

		- a x
Training Manager File View Training Tools Help		- U X
	1 second	
Ker Merc	Contine Location Location The Zone The Zone Location The Zone T	Complete the detail as required and associate the relevant time zone. Click on Apply once completed.
Sak Heru ✔ Forms & Locations ✔ Hereni ▲ Clocatoon > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲ > ▲		
Preferences •		Terosi Carool

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.

SkillsPlanner - Version 3.4	
Ele View Iraining Help	
Main Menu	Location
🖌 🎋 SkillsPlanner	
Training Requests	Location Name Atlanta
Meetings	Location Notes
b and a source Calendars	
🎋 SkillsPortal Users	
a 🛞 Configuration	
🖌 🏯 SkillsPlanner	Parent Location (None)
Training Categories	
Meeting Types	Time Zone (UTC -08:00) US/Pacific 💌
Booking Categories	
🍰 Selection & Exclusion	Update Information
a 👬 Resources	Created Thu, 09 Aug 2012 15:48 by IEXTota/New/master
Rooms & Locations	Last Updated Thu, 09 Aug 2012 17:24 by IEXTotal/iew/master
Trainers	
Managers	
🐥 SkillsPortal	
🐺 SkilsAssess	
Sub Menu	
Booms & Locations	
Viewing Active	
a 🕕 Internal	
No Location>	
> 🚊 Atla	
Dia Gla	
Lon ? New Location	
Mar 🗙 Delete Location	
S Delete Eccelor	
🛃 🖌 View Active Rooms	
View Inactive Booms	
Preferences +	Acply Qose
: alls unergranges .	

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.

🗾 Training Manager			_	o ×
File View Training Tools Help				
Main Menu	Location			
a 🚦 Training Manager	Location			
Training Requests	Location Name *	London		
Meetings	Time Zone *	GMT Y		
Resource Calendars	Location Notes	Unit · ·		
Room Calendars	Cocation motes			
Trainer Calendars				
Manager Calendars				
Configuration	Parent Location			
Training Manager	Parent Location	v centr		
Training Categories				
Meeting Types	Update Information			
Booking Categories	Date Created	07 November 2014 by SYSTEM		
all Selection & Exclusion	Last Updated	07 November 2014 by SYSTEM		
a 🖁 🛱 Resources				
Rooms & Locations				
Trainers				
Managers				
Training Manager Portal				
> 🛃 WFM				
Sub Menu				
Rooms & Locations				
Viewing Active				
a 🕕 Internal				
(No Location>				
b 🗐 Londor				
New Location				
Jai San Fr New Room				
Solite Delete Location				
Desete Location				
View Active Rooms				
Vew Inactive Rooms				
The machine rooms				
			-	
Preferences •			Apply	Close

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.

😴 Training Manager		- 0 ×
File View Training Tools Help		
	Dural Control of Contr	
Man May Training Reparts Manager Man	Read Board Room Roon Datas	
Sá Menu ₄ C Tona Lucations of Vanay Action ∡ O terrari ⊥ de location		
London Source Floors		anty Cone

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.



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.

frainer (Ext	emal)					
First Name *	1	1				
Last Name *						
Employee ID	-					
Trainer Deta	ils					
Active Skills						
Skill Code	Skill Na	Skill Co	Train th	Course		



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.

rst Name * Joe							
ast Nan	ne *	DePlummer	DePlummer				
Employee ID *		232					
Email Ad	dress						
Frainer D	Details						
Manager	r	<none></none>				\sim	
VFM ID		2C990604-1	D8B-F9AD-0	1D-914780590	DEBE		
Active		\checkmark					
Cerve C							
	rking Hours	Working R		cations SI	kills		٩
	Working H	lours	Lunch		kills		۱ ۵
	Working H	lours End	Lunch Earliest	Latest	kills		۱ ک
Wo	Working H Start	Iours End 17:00 🜩	Lunch Earliest 12:00 🜲	Latest	kills		4
Won	Working H Start 09:00 🜩 09:00 🜩	lours End 17:00 € 17:00 €	Lunch Earliest 12:00 🜩 12:00 🜩	Latest 13:00 13:00	kills		4 1
Won Mon Tue	Working H Start 09:00 (\$) 09:00 (\$) 09:00 (\$)	kours End 17:00 ♀ 17:00 ♀ 17:00 ♀	Lunch Earliest 12:00 🜩 12:00 🜩	Latest 13:00 🜩 13:00 🜩	kills		4
Won Mon Tue Wed	Working H Start 09:00 ♀ 09:00 ♀ 09:00 ♀ 09:00 ♀ 09:00 ♀	lours End 17:00 € 17:00 € 17:00 € 17:00 €	Lunch Earliest 12:00 💠 12:00 💠 12:00 💠	Latest 13:00 🔹 13:00 🔹 13:00 🔹	kills		0 1
Woo Mon Tue Wed Thu	Working H Start 09:00 ♀ 09:00 ♀ 09:00 ♀ 09:00 ♀ 09:00 ♀	lours End 17:00 € 17:00 € 17:00 € 17:00 €	Lunch Earliest 12:00 🜩 12:00 🜩	Latest 13:00 🔹 13:00 🔹 13:00 🔹	kills		0 1

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.

Working Hours Working Rules Location	ns Skills O D
Maximum Hours Per Day	9 🜩 Hours
Maximum Hours Per Week	40,00 🜩 Hours
Trainer Week Starts On	Monday 🗸
Minimum Hours between Working Days	8 🖕 Hours
Minimum required Lunch Break in the Working Day	60 🚔 Minutes
Total minutes for all Breaks in the Working Day	60 🚔 Minutes

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**.

Working Hours Working Rules Locations Skills	D
Legend Home Location Right-click a Location to change Home status	
Locations	
🔽 🧾 Central Time - America Chicago	
🔲 <u>ଲ</u> London	

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.

Working Hours Working Rules Locations Skills	
Legend Home Location Right-click a Location to change Home status	
⊿ 🛄 Locations □ 🛄 Atlanta	
Remove as Home Location 🗹 🚊 London	
💽 🛄 Manchester	

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.

- Trainer Skill	
Skill Code *	
Name of Skill *	
Maximum Skill Level *	10 .

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.

1	Vorking	Hours \	Working Rules	Locations Skills	۵ ۵
Sk	ill Code	Skill Name	Skill Competency	Train the Trainer Date	Course with Skill Last Trained
				2	Add Skill

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.

Locations Skills	< ▷	
👷 🔓 Choose Trainer Skill		×
Skill	KAS125 - Advanced Sales	•
Skill Competency (1)	Y	· · ·
Train the Trainer Date	✓ 26 February 2014	
	February 2014 DK Ca	ancel
	Mon Tue Wed Thu Fri Sat Sun	
	27 28 29 30 31 1 2	
	3 4 5 6 7 8 9	
	10 11 12 13 14 15 16	
	17 18 19 20 21 22 23	
	24 25 26 27 28 1 2	
	3 4 5 6 7 8 9	
	Today: 26/02/2014	

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.

Event 1 - [S	chedule Event]				
Skills	Resources	Interruptible Activities	Scheduling Options	Optimised Search	Manual Search
Code		Name			
AS125		Advanced Sales			
BS574		Business Strategy			
IM143		Intermediate Marketing			

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.

Terming Marging Teal Teals Terming Marging Teal Teals Te

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 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.

SET WORKING DAY DEFAU	5210								
Information	Day of Week	Start	Time	End	Time	Earliest L	unch Star	t Earliest I	unch En
Change the data below to set your default	Monday	08 •	00 •	18 •	00 •	12 •	• 00	14 •	00 •
working days and hours.	Tuesday	08 •	00 •	18 •	00 •	12 •	00 •	14 •	00 •
	Wednesday	<mark>08</mark> •	• 00	18 •	• 00	12 •	• 00	14 🔻	00 •
	Thursday	08 •	00 •	18 •	• 00	12 •	• 00	14 🔻	00 •
	Friday	08 •	• 00	18 •	00 •	12 •	• 00	14 •	00 •
	Saturday	08 •	• 00	18 •	• 00	12 •	• 00	14 •	00 •
	Sunday	08 •	• 00	18 •	00 •	12 •	• 00	14 •	00 •

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.

SET WORKING DAYS												
Information		Month/Year:	December •	2017 •								
Change the data below to set your default working days and hours. This highlight represents a non-working day.	Day of Week	Use Default Hours	Start Time	End Time	Is a Working Day	Day of Week	Use Default Hours	Start ⁻	Time	End	Time	ls a Working Day
▲ Important	Fri 1	4	08 * 00 *	18 * 00 *	d.	Sun 17	•					
Please do not use this form to define periods	Sat 2	✓				Mon 18	•	08 *	• 00	18 *	00 *	1
of scheduled absence (e.g. Holidays, Training Days) where you would otherwise be	Sun 3	I				Tue 19	4	08 *	• 00	18 *	00 *	4
working.	Mon 4		08 * 00 *	18 * 00 *	al and a second	Wed 20	1	08 *	• 00	18 *	00 *	4
This form is for specifying UNPAID, NON- WORKING time only.	Tue 5	~	08 * 00 *	18 * 00 *	A.	Thu 21	4	08 *	• 00	18 *	00 *	1
working time only.	Wed 6	•	08 * 00 *	18 * 00 *	A.	Fri 22	•	08 *	• 00	18 •	00 *	s.
	Thu 7	•	08 * 00 *	18 * 00 *	al a	Sat 23						
	Fri 8	•	08 * 00 *	18 * 00 *	d.	Sun 24						
	Sat 9	1				Mon 25	1	08 *	• 00	18 •	00 *	-
	Sun 10	√				Tue 26	4	08 *	• 00	18 *	00 *	-
	Mon 11	1	08 ¥ 00 ¥	18 * 00 *	A.	Wed 27	4	08 *	• 00	18 *	00 *	1
	Tue 12	*	08 * 00 *	18 * 00 *	4	Thu 28	4	08 *	• 00	18 *	00 *	1
	Wed 13	*	08 * 00 *	18 * 00 *	I.	Fri 29	4	08 *	• 00	18 •	00 *	s.
	Thu 14	1	08 ¥ 00 ¥	18 * 00 *	A.	Sat 30	4					
	Fri 15	•	08 * 00 *	18 * 00 *	4	Sun 31	•					
	Sat 16											
	Save											

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**.

First Name *	Lorenzo		
Last Name *	Bratzo		
Employee ID *	6000		
Email Address			
Manager Details			
WFM ID	2C99021C-1850-38D8-0118-5224B5D60290		
Active			
Working Hours	Locations	\triangleleft	
⊿ Locations □ ⊥ Centr ☑ ⊥ Lond	al Time - America Chicago on		

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**.

Selection	Global Exclusions	
Display Mode	WFM Hierarchical	•
🔒 📥 Blue Sky	/ Airlines	
🔺 🗐 Lone	don	
⊳ 🃸	<none></none>	
⊿ 🎬	UK_Supervisor A (Location: London HQ)	
	🐣 UK_Agent UK_Agent_002 (Location: London HQ)	
	SUK_Agent UK_Agent_002.(Location: London H0)	
	Set Location	
	🚨 UK_Agent UK 💥 Remove Location	
	各 UK_Agent UK	
	SUK_Agent UK 🍘 Completion Status	
	S UK_Agent UK Globally Exclude	
	SUK_Agent UK_agenc_oos_cocation. London nig)	
	🚨 UK_Agent UK_Agent_010 (Location: London HQ)	
	🚨 UK_Agent UK_Agent_011 (Location: London HQ)	
	🚨 UK_Agent UK_Agent_012 (Location: London HQ)	

Figure 38: Viewing a user's past training activities

Master Schedule Scenarios	
Training Session Filters Enable Date Filter Start Date D5 Mar 2014 End Date 19 Mar 2014 End Date P Refresh	Any past training activity will then be visible and can be filtered by date and status.
Columns	
🗹 Location 🔽 Team 🐱 Site 🗹 Business Unit	
First Name Last Name Employee ID 🔔 Location 👹 Team 📮 Site 🚔 Business Unit 🕼 Training Request 🧠 Code 🍛 Event Start Date End Date	A Trainer A Trainer Emp.ID A Room Status Trainer Comments User Comments Exclusion Reason

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.

Main Menu	Room C	alendar:	Board Roo	m				
a 📑 Training Manager	Start Date	27/1	1/2017	End Date		11/12/2017	🖉 Refresh	
Training Requests							By Frendan	
Meetings	Start Time	End Time	Booking Category	Purpose	Notes			
A a R Resource Calendars								
A Trainer Calendars								
A Manager Calendars								
Configuration								
a 📑 Training Manager								
Training Categories								
Meeting Types								
Booking Categories								
🍰 Selection & Exclusion								
⊿ ∄ 🛱 Resources								
E Rooms & Locations								
a 📰 Trainers								
Trainer Skills								
Managers								
Training Manager Portal WFM								
S MHW								
Menu								
Room Calendars								
Viewing by Location								
🔜 <no location=""></no>								
Board Room								
Break Out Room								
Pod								
Training Room 1								
Training Room 2								
New York								
San Francisco								
Solihull								
D Tokyo								
Preferences -								

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 rightclicking 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.

C Training Manager		- 0	×
File View Training Tools Help			
Han Here Training Reparts Market Hear Canada Hear Canada Market Canada Market	Tane* Image: Design Character (1257) Image: Design Character (1257) Booking Caracter (1257) Image: Design Character (1257) Image: Design Character (1257) Bat Desi Design Character (1257) Image: Design Character (1257) Bat Desi Design Character (1257) Image: Design Character (1257) Bat Desi Design Character (1257) Image: Design Character (1257) Bat Desi Design Character (1257) Image: Design Character (1257) Bat Design Character (1257) Image: Design Character (1257) Image: Design Character (1257) Bat Design Character (1257) Image: Design Character (1257) Image: Design Character (1257) Image: Design Character (1257) Bat Design Character (1257) Image: Design Character (1257) Image: Design Character (1257) Image: Design Character (1257) Bat Design Character (1257) Image: Design Character (1257) Image: Design Character (1257) Image: Design Character (1257) Notes Design Character (1257) Image: Design Character (1257) Image: Design Character (1257) Notes Design Character (1257) Image: Design Character (1257) Image: Design Character (1257) Design Character (1257) Design Cha		
Sub Menu Trainer Calendars			
Trainer Calendars Viewing by Hierarchy			
Briony Christopher			
Gerry Jones View by Location	4		
Gina Jones View by Herarchy John King View by Alexandro Onder			
Lee McCann Lis Lis No Service Calendar Entry			
🚨 Mark Bergman			
Atthew Brown A Nichelle Bowes			
Owen Bower			
🚨 Wiima Ross			
Preferences *		pply	Close

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

🛃 Training Manager	
File View Training Tools Help	
Main Menu A 100 Training Manager	Trainer Calendar: Briony Christopher
Iraining Manager III Training Requests	Start Date 27/11/2017 🗊 v End Date 11/12/2017 🗊 v
Meetings	
A 3 Resource Calendars	Start Time End Time Booking Category Purpose Notes
Room Calendars	Monday, 04 December 2017
Trainer Calendars	1 4 Dec 2017 09:00 4 Dec 2017 17:00 Meeting 17 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
🗸 Manager Calendars	Friday, 08 December 2017 - 201
Configuration	Tel 8 Dec 2017 08:00 8 Dec 2017 12:00 Traine El Edit Calendar Entry Class 3 in Training Room 2 with Briony Christopher
a 🛐 Comparation	Electronic Calendar Entry
Training Categories	C Verete Calendar Entry
Meeting Types	
Booking Categories	
A Selection & Exclusion	
Resources	
Rooms & Locations	
Trainers	
Trainer Skills	
Managers	
1 Training Manager Portal	
▶ 😴 WFM	
Sub Menu	
a 🔲 Trainer Calendars	
Viewing by Hierarchy	
Sriony Christopher	
Serry Jones	
🚨 Gina Jones	
🚨 John King	
🚨 Lee McCann	
🚨 Lisa Davis	
🚨 Mark Bergman	
Search Matthew Brown	
Source And Annual Annua	
🚨 Owen Bower	
🚨 Wiima Ross	

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

TRAINER CALENDAR	
Legend No Category 1-2-1	Standard View Planner View © Open in new window © Click here to Refresh Your current time zone is GMT
Admin	C D today S 5 December 2017
Meeting / Training Prep	8 ²⁰
Non WFM Meeting	gan New.
Training Session	Go to Today Toggle 24 Houry/Business Day

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**.

The Work Turing Tools Holp The More Strength Turing Strength The More Strength <	😴 Training Manager	
Set Merry Branzer Training Branzer From Catedratis From Catedratis From Catedratis From Catedratis From Catedratis From Sciences From Sciences F	File View Training Tools Help	
Taking Repairs Resource Clenders Trainer Clenders Trainer Clenders Trainer Clenders Trainer Clenders Trainer Clenders Sector A E-culum Sector A E-culum Sector A E-culum Sector A E-culum Sector A E-culum Nearer Trainer States Resource Trainer Sector A E-culum Sector	Main Menu	
Image: Charles Image:		
A Mere	Training Requests	
Interver Caledase Manager Caledase Manager Caledase Manager Caledase Manager Caledase Terring Manager Caledase Terring Manager Caledase Manager Manag		
Inter Calculas Inter Ca		
Constants		
 Configuration Training Calcoport Stating Organization Stating Calcoport Training Calcoport Training Calcoport WFM 		
Terring Manager Terring Catagories Setch o & Exclusion Terring Tarrier Terring Manager Training Manager Potal With		
Selving Casegories Selving Casegories Selving Casegories Selving Casegories Selving Casegories Training Categories Training Categories Selving Casegories Selving Casegories Training Categories		
Metring Type Boticy Casoprie Societion & Evolution Prove & Constrained Trainers Trai		
Solvers A Exclusion Trainer Solls		
Second A Evaluation Powne A Locations Trainers Sults Managers Training Manager Portal Training Category Merry Mer		
So Mervi Were Training Categories Were Training Categories		
Sol Merry Verify Verify Verif		
Training Manager Potal Texing Manager Potal Texing Manager Potal Texing Manager Potal Texing Category Went Matter Training Categories Went Matter Training Categories New Poda		
Training Managers		
Marager Training Marager Potul WFM Sub Meru Mer Training Categories Mer Training Categories Mere Production Control of Categories Mere Production Control of Categories		
Training Manager Portal VFM Set Menu Venux V		
Seb Meru Seb Meru Class Traving Categories Class Traving Categories New Hardwe Traving Categories New Here Prod.		
So Meru Tatring Calegories Were Volume Training Calegories New Produce Training Calegories New Produce Training Calegories		
So Meru Training Categories Class Training Categories New Product.		
Seb Mere Training Categories Were Yords Mere Product		\bigcirc CI KII CVC
Seb Mere Training Categories Were Yords Mere Product		
So Meru Training Categories Class Training Categories New Product.		
Sub Meru		
Sub Meru		moments connected
Training Category Wewn Xature Training Categories Learning Vew Mactive Training Categories New Production		moments connected
Training Category Wewn Xature Training Categories Learning Vew Mactive Training Categories New Production		
Iraining Category Wew Yacking Training Categories Lesrning New Production		
Iraining Category Wew Yacking Training Categories Lesrning New Production		
Training Category Wewn Xature Training Categories Learning Vew Mactive Training Categories New Production		
Viewige Liew Haring Categories		
Class Traing Categories User Hardweit Training Categories Were Maddveit Training Categories Were Maddveit Training Categories		
Learning Vew Nactive Training Categories		
New Produce Training Lategores		
Preferences ~	V New Product Chara pages	
© Preferences -		
Preference: •		
Preferences -		
Preferences -		
© Preferences -		
© Preferences -		
© Preferences +		
© Preferences -		
	Preferences *	
	06	1



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**.

Training Manager								- a ×
File View Training Tools Help								
Main Menu	Training Category							
Training Reparts Medica Medica Associate Colondars Minor Calendars Minor Calendars Minopal Calendars Minopal Calendars Minopal Calendars	Name " Notes Exception Type " Active	New Trai	Renesys Exception	Che	099		×	
Training Manager Training Categories Meding Types Booking Categories Secking Categories Secking Categories			Name Coaching Session	London COA I HOL I	New York Sen Fr COA COA HOL LN ELN	Incisco D Tokyo COA HOL ELN	×	
Constant Constant			Company Holding eLearning Class DIC 1 PMLA PMLA New Hee Meeting Che to Che Team Heeting Training Class	FML FML FSD	FAL FAL 50 FSD 444 AHA 421 121 721 121 730 TMA 734 TMA	FML BDD NHM 723 PDD TMM TRA		Select which exception code to associate with the training category and then click on OK .
Sub Meru							DK Cencel	
Preferences *								Apply Cancel

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.

🔀 Training Manager File View Training Tools Help
 File
 View
 Training
 Tools

 Mani Menu
 Training Manager
 Image
 Image

 Image
 Image
 Imagee

 Image
 Imagee
 Imagee

 Imagee
 Imagee
 Imagee

 I <mark>ร</mark>่ GENESYS^ะ moments connected Sub Menu Meeting Types Viewing Active Solution 1-2-1 Solution Retrospectives Solo Activity

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.

📑 Training Manager				– Ø ×
File View Training Tools Help				
Main Menu	Meeting Type			
Image: Interview of the second s	Name *	121	Select the correct	
Iraning Requests Meetings	Booking Algorithm *			
A BE Resource Calendars		One to one V		
Room Calendars	Notes	Meeting One to one	booking algorithm.	
Trainer Calendars		Solo Task		
A Manager Calendars				
Onfiguration				
a 🚦 Training Manager	Exception Type *	One-to-One Choose		
Training Categories	Active			
Meeting Types				
Booking Categories	Update Information			
A Selection & Exclusion	Date Created	10 November 2014 by SYSTEM		
A B Resources	Last Updated	30 March 2017 by SYSTEM		
Rooms & Locations				
🖌 🔝 Trainers				
Trainer Skills				
Managers				
Training Manager Portal				
> 🛃 WEM				
Sub Menu				
🖌 📰 Meeting Types				
Viewing Active				
(🧀 1-2-1				
Group Meeting				
a Retrospectives				
al Solo Activity				
Preferences *				Apply Close

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...**

📑 Training Manager			- 0 X
File View Training Tools Help			
Main Menu	Meeting Type		
Training Manager () (2) Training Requests	Name *	1.2.1	
Meetings	Booking Algorithm *	One to one	
A 215 Resource Calendars			
Room Calendars	Notes	1-2-1 or face to face meeting Manager + 1 Agent	
A Trainer Calendars			
Manager Calendars			
Configuration			
Training Manager	Exception Type *	One-to-One Choose	
Training Categories	Active		
Meeting Types			
Booking Categories	Update Information		
🌧 Selection & Exclusion	Date Created	10 November 2014 by SYSTEM	
Resources	Last Updated	30 March 2017 by SYSTEM	
Rooms & Locations			
A 🔝 Trainers			
Trainer Skills			
Managers			
S Training Manager Portal			
> 📑 WFM			
Sub Menu			
🖌 💷 Meeting Types			
Viewing Active			
A 121			
S Group Neets X Delete Meeting Type			
🌮 Retrospectiv 🧹 View Active Meeting Types			
Solo Activity			
Vew Inactive Meeting Types			
100.1			åpply Cancel
Preferences *			State Contraction

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.

Eile View Iraining Help					
Main Menu	Booking Category				
🖌 🏯 SkillsPlanner					
Training Requests	Name	<new b<="" th=""><th>ooking Category></th><th></th><th></th></new>	ooking Category>		
III Meetings	Color			1	
A 📲 Resource Calendars				, ,	
🐔 Room Calendars	Room Calendar Category	Γ			
🚨 Trainer Calendars	Trainer Calendar Category				
💩 Manager Calendars		-	Color ?X		
🎋 SkillsPortal Users	Manager Calendar Category	Γ	Basic colors:		
a 🎲 Configuration	Is Working Time				
🍙 👾 SkillsPlanner		-			
Training Categories	Active	•			
Meeting Types					
Booking Categories					
i Selection & Exclusion					
a 📲 Resources					
Rooms & Locations					
Trainers			Custom colors:		
Managers					
🐥 SkilsPortal					
🧍 SkillsAssess			Define Custom Colors >>		
			OK Cancel		
Sub Menu					
Booking Categories					
Viewing Active					
Holday					
Management Meeting					
Meeting					
Sickness					
🗾 Training Session					
-					
Preferences +					Apply Cancel

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.

Authentication			
User Name and	Password		
SiteMinder	Authorization Header	HTTP_EIN	
JZero LMS			
SLS Third Party	Authenticate with	Employee ID	w.
	Login URL		
	Logout URL		

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).

Welcome Title *	Welcome	
Header Title *	SkillsPortal	
Visibility		
Training Roadmap it	ems visible on the Home Page (max. 100)	5 🌲
Display "Pending Ap	proval" Training Requests and Meetings	
Manager Freeze	Window	
Enabled	0 📥 days (max 90)	
	Figure 62: Portal item dis	play configuration

7.2.3 Attendees in Calendar Requests

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

Configuration

nclude names of all participants n the body of meeting and	Don't Include	•
training 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.

Training Manager			- 0
File View Training Tools Help			
Main Menu	Stat User Selection Training Even	nts Training Sessions Completion Status Statistics	
🖌 🌄 Training Manager		Its Hearing Sesantis Compressi Status Status	
Training Requests	Details *		
Meetings	Main Title *		
a a g Resource Calendars			
Room Calendars	Reference *		
Strainer Calendars	Training Category *	~	
S Manager Calendars			
Configuration	Description and Objectives *	^	
Training Manager Training Categories			
 Iraining Categories Meeting Types 		~	
Booking Categories	Business Sponsors		
Selection & Exclusion			
A Resources			
Rooms & Locations	Stakeholders		
a 🔲 Trainers			
Trainer Skills	Additional Notes		
Managers	Additional Notes		
Training Manager Portal			
D 💽 WEM	Status ' Dending Apr		
	Training Manager Portal 🔲 Also displaye	d on the Training Roadmap	
	Dates		
	Window Start Date	04/12/2017	
	Window End Date	04/01/2018	
Sub Menu	-		
Sub Menu Training Requests			
Generating requests Sep 2017 - 4 Jan 2018			
A sep 2017 - 4 dan 2018 M Requested			
Pending Approval			
New product			
new regulations			
> () Active			
O Completed			
Rejected			
			< Previous Next > Apply Close
Preferences •			



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.

S Training Manager	
File View Training Tools Help	
Main Menu	Start Uber Selection Teating Severits Teating Severits Completion Status Statistics
a 🧧 Training Manager	
Training Requests	Detals
I Meetings	Main Title * NEw Training Request
A 🖁 🛱 Resource Calendars	
Room Calendars	Reference *
Trainer Calendars	Training Category *
a Manager Calendars	Description and
Configuration Training Manager	Description and Objectives *
Training Gategories	
Meeting Types	×
Booking Categories	Business Sponsors
A Selection & Exclusion	
Resources	
Rooms & Locations	Stakeholders
A Trainers	
Trainer Skills	Additional Notes
Managers	
S Training Manager Portal	
⊳ 🧐 WFM	Atus * O Pending Approval
	11 Pending Approval
	Training Manager Potal
	Dates @ Comparised
	Window Skit Date Ditter2017
	Window End Date 04/01/2018
Sub Menu	
J Training Requests	
🇐 4 Sep 2017 - 4 Jan 2018	
E Contraction Requested	
Pending Approval	
Rew product	
es new regulations	
O Active	
▷ ① Completed ▷ ③ Rejected	
Kejected	

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).

Training Manager						
File View Training Tools Help	r					
n Menu		Start User Selec	tion Training Events	Training Sessions	Completion Status	Statistics
S Training Manager		Details *				
Meetings						
Resource Calendars		Main Title *	NEw Training Reque	st		
Room Calendars		Reference *				
Trainer Calendars		Training Category *				
anager Calendars 🚨		Training Category			~	
Configuration		Description and				^
a 📑 Training Manager		Objectives *				
Training Categories						\sim
Meeting Types		Business Sponsors				
Booking Categories Selection & Exclusion						
Selection & Exclusion						
Rooms & Locations		Stakeholders				
Trainers						
Trainer Skills						
Managers		Additional Notes				
g Training Manager Portal						
S WFM						
		Status *	Pending Approva	31	~	
		Training Manager P	ortal 🗌 Also displayed on	the Training Roadmap		
		Dates		04/12/2017	10	
		Window Start Date				
		End Date		 Dece 	mber 2017 🔹	-
	Amend the date	e /_		Mon Tue Wed		
				27 28 29 4 5 6	30 1 2 3 7 8 9 10	1
	range as require	ed.		11 12 13	14 15 16 17	1
Menu				25 26 27	21 22 23 24 28 29 30 31	1
Training Requests				1 2 3	4 5 6 7	1
4 Sep 2017 - 4 Jan 2018				LT	oday: 04/12/2017	_
Requested						
Pending Approval						
🧠 New product						
new regulations						

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.

Genesys Skills Management 9.0.0

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.

y Cho	ose the users from workforce management who will be getting this training.
Selec	Global Exclusions
lisplay	Mode WFM Hierarchical
· 📥	Blue Sky Airlines
⊿	📕 London
	▷ □ 🎆 <none></none>
	🖌 🗌 🎆 Frank Lampard (Location: London)
	🔲 🚨 Abida Mushtaq (Location: London)
	🔲 🚨 Adam Cuthbertson (Location: London)
	🔲 🚨 Akemkar Paul (Location: London)
	🔲 🚨 Alexander Lightbody (Location: London)
	🔲 🕭 Angela Cormack (Location: London)
	Anthony O'Donnell (Location: London)
	🔲 🚨 Claire Griffiths (Location: London)
	Elizabeth Fleming (Location: London)
	🗌 🚨 Gary Wilkinson (Location: London)
	🗌 🚨 Glenn Howard (Location: London)
	Ashim Ahmed (Location: London)
	Ilona Stolte (Location: London)
	🗌 🚨 Jason Sanguigni (Location: London)
	Soseph McCulloch (Location: London)
	🗌 🚨 Margaret Tallach (Location: London)
	🗌 🐣 Mohammad Akhtar (Location: London)
	Rob Allan (Location: London)
	Rob Tuck (Location: London)
	Scott Gibson (Location: London)
	Shaheen Ashraf (Location: London)
	Shanksib Ahmed (Location: London)
	Steven Fletcher (Location: London)
	Usman Gulzar (Location: London)
	Strike St
	🗌 🚨 Zein Iqbal (Location: London)
	▶ ☐∰ Kelly Smith
	Dev Mark
Þ	New York San Francisco

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.

😹 User Selection Filters	_ [] _	×
The selections on all tabs combine together to apply the filtering. Skills SkillsAssess SkillsAnalysis Pattern Matching	Columns	
Cutoner Service	First Name Oyntha Dariel Diana Emily Emma Eithan Glenda Grace wa Buen ick Jacob Jacob <td></td>	
		L

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.

💩 User Selection Filters	×
O The selections on all tabs combine together to apply the filtering. Skills SkillsAssess SkillsAnalysis Pattern Matching	Columns Colucation C Management Unit
Cutomer Service <u>- v 1 x</u> Drders <u>- v 1 x</u>	First Name ▲ Cynthia Daniel Dianel Dianel Emay Emay Ethan Binda Bince van Buren ier
User Selection There are 0 match(es) Add to the existing 261 matches or Replace all the existing	×
	Kayla Kayla Kholik Kyle Lucky Lucky Lucky Lucky Madion
	Microid



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.

🚨 User Selection Filters			_		×
The selections on all tabs combine together to apply the filtering Performance DNA SkillsAnalysis Pattern Matching DNA @ D		Columns Columns Location C Team Site Business Unit			
Strand Selection Strand Please Select Drill Down User Range Low 0.00 High 100.00 Strand V	Add Matches	First Na Last Na Employ 🔔 L 🍪 T		Site 📤	Β
		0 Matches			
		OF	(Can	cel

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

in Menu	Start	User S	election	Training Events	Training Sess	ons Completion Status Statist	ics
🛿 😸 Training Manager		0	U				
Training Requests	🛛 🕐 Cł	noose the u	users from w	orkforce manager	nent who will be getti	ng this training.	
Meetings		12	\sim				
A a Resource Calendars	Sele	ection	Global Exc	lusions			
🚮 Room Calendars							
🚨 Trainer Calendars		xclusions l	List By	Date			
B Manager Calendars							
🛯 🌼 Configuration							
🖌 🧧 Training Manager	Fin	st Name	Last Name	Employee ID	Exclusion Reason	WFM Team	
Training Categories		Usman	Gulzar	UK_Agent_052	Secondment	Frank Lampard	
Meeting Types							
Booking Categories							
all Selection & Exclusion							
⊿ 🦉 🛱 Resources							
Rooms & Locations							
🖌 🔲 Trainers							
Trainer Skills							
Managers							
😸 Training Manager Portal							
S 😴 WFM							

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.

📥 User Selection Filters				_10 ×
The selections on all tabs Skills SkillsAssess	s combine together to apply the filtering SkillsAnalysis Pattern Matching C D		Columns	🥶 M
Case Sensitive			First Na Last Na Employ 📃 L	<u> </u>
First Name Last Name	Is	Add Matches >		
	Contains Ends With	Add Mat/Her >		
			0 Match(es)	
				<u>OK</u> <u>C</u> ancel

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:

Text Training Request	Event Details Description Public Description SkillsPortal Content Link Training Category Defined Category Categ	Include any description here. Any information in the Public description will appear with the training request details e.g. bring a notebook etc.
Rename the event if required.		

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

Iraning Help	
📴 Event 1 - [Schedule Event]	
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search	()
a s resources	
r 🛄 Atlanta r 🛄 Giasgow	
- 🛄 London	
Marchester	
- 🗹 👷 Marchester Room 1	
- 🔤 🜉 Manchester Room 3	
- 🗹 👶 Charle Dixon	
Choose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver this Training	
Select All 💥 Delets 🔗 Refresh 🙀 Export	
Exceptions 🗊 OK 📢 Masing	
· · · · · · · · · · · · · · · · · · ·	
Schedule (0)	0.0
🏛 Sync Status Statu Date End Date 🧕 Room Seats 🕹 Trainer Employee ID # Users # Attended # Completed Created 💍 Name(s)	
0 Item(s)	
Completion Status	<u>o</u> k
	<u>e Zone</u> 🍕:
Int ready Webread, its ups its its its its its its its its its it	

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**.

Reserved Places (0 = Reset)	X
<u> </u>	

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.

Iraining Heb		
Event 1 - [Schedule Event]		_ 🗆 ×
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search		
	Select the Location(s) and expand to reveal the associated trainers and rooms.	
Schedule (0)		
📧 Sync Status Start Date End Date 🧟 Room Seats 🚨 Trainer Employee ID # Users # Attended # Completed Created	B Name(s) ∫	
0 Item(s)		
Completion Status		<u>0</u> K
EX- Ready	Wednesday, 15 August 2012 16:21 BST	<u>Time Zone</u> 47.
		====

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.

Class Training (Request) - [Schedule Event]
Skills Resources Interruptible Activities Scheduling Options Optimised Search Manual Search
Activity
Activity Set
Weal
Break
□ ♥ Break 1 □ ♥ Break 2 □ ♥ Meal
Marked Time
Andatory Overlime
Exception - Please note that interrupting Exceptions is irreversible.
Coaching Session
□ 💁 FMLA
La Sick Day
Artial Sick Day
A Team Meeting
🖫 Select All 💥 Delete 🖑 Refresh 🚽 Export
Exceptions 🎒 OK 🦸 Missing 💋 Overwritten 🚝 Overwritten (cannot be interrupted)
Master Schedule (0) Scenarios (0)
😸 Sync Status Start Date End Date 🌉 Room Seats 🚨 Trainer Employee ID # Users # Attended # Completed Created 💩 Name(s)

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.

Start User Selection	Training Event	s Training Sessi	ons Com	pletion S	tatus
🥑 View all Training Ses 🗔 Select All 🔀 Delete	-		ation status wit	h Workf	orce Mai
Exceptions of OK	<i>에</i> Missing <i>에</i> Ov Scenarios (0)	rerwritten 🏼 🎒 Overw	vritten (cannot b	e interru	pted)
Sync Status	Start Date	End Date	🛒 Room	Seats	🚨 Т
해 Training Class 해 Training Class 해 Training Class 해 Training Class		21 Mar 2017 12:45 22 Mar 2017 11:15 23 Mar 2017 11:45 26 Mar 2017 11:15		1-20 1-20 1-20 1-20	Briony (Briony (Briony (Briony (

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.

E Event 1 - [Schedule Event]	
Event 1 - [Schedule Event] Resources Interruptible Activities Schedules Workforce Schedule:	Right click on the Location and select reserved places. The reserved places window will then appear.
Choose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver this Training.	

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.

Event 1 - [Schedule Event]	
Event 1 - [Schedule Event] Resources Interruptible Activities Schedule CMaster Schedule CMaster Schedule CManchester Room 1 CM Manchester Room 2 CM Manchester Room 3 CM Daniel Oliver CM Sched Oliver CM Sched Oliveil	Places reserved against the location. Select the required trainers and rooms.
Choose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver to	is Traing.

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.

Activity		London 🔒	New York	San Francisco 🛛 🗐	Tokyo
Activity					
🔲 🏶 BillingGoldChat	Yes	Yes	Yes	Yes	
🗖 🏶 BillingGoldEmail	Yes	Yes	Yes	Yes	
🗖 🏶 BillingGoldVoice	Yes	Yes		Yes	
🗖 🏶 BillingGoldVoiceSF			Yes		
🔲 🏶 BillingSilverChat	Yes	Yes	Yes	Yes	
🔲 🏶 BillingSilverEmail	Yes	Yes	Yes	Yes	
🔲 🏶 BillingSilverVoice	Yes	Yes	Yes	Yes	
🗖 🏶 LostLuggage	Yes	Yes	Yes	Yes	
🗖 🏶 LoyaltyCard	Yes	Yes	Yes	Yes	
🔲 🏶 MileageCredit	Yes	Yes	Yes	Yes	
🔲 🏶 VacationPackages	Yes	Yes	Yes	Yes	
Activity Set					
🗖 🏶 Email		Yes			
🔲 🏶 LostLuggage		Yes			
🔲 🏶 LoyaltyCard		Yes			
🔲 🏶 MileageCredit		Yes			
🔲 🏶 MultiMedia_Activities	Yes				
🔲 🏶 VacationPackages		Yes			
Select All 🔀 Delete 🔗	Refre	sh 🛄 Export			
Exceptions 🛒 OK 🗳 M	issing				
Master Schedule (0)	icena	ios (0)			

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.

Training Events

E Event 1 - [Schedule Event]	
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search	
Duration	
Duration (hhmmi) 01:00	
Duration includes Trainer Lunch Break	
Repeat Days 1	
Group Size	
Min. Group Size 0 🚔 Max. Group Size 0 🚔	
Team-Based Scheduling	
Keep teams together ADG Name O This is a Global setting which will apply to all Training.	
Save Cancel	
🗄 🗔 Select All 💢 Delete 👸 Refresh 🚽 Export	
Exceptions 🦨 OK 😝 Missing	
Schedule (0)	
🔟 Sync Status Start Date End Date 🚮 Room Seats 🚨 Trainer Employee ID # Users # Attended # Completed Created 🙇 Name(s)	
0 ltem(s)	
Completion Status	ОК



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

📰 Ever	nt 1 - [Schedule Event]			
R	esources Interruptible Activities Scheduling	g Options Optimised Search Manual S	Search	
2	Debrised Search Algorithm Template All days Time 1 Travel Constraints Transition Time (mins) Min. Activity Gap Belore (mins) Trainer Travel Performance Constraints Coverage Tolerance Coverage Tolerance Coverage Tolerance	Vorking UJUUT (Local) Start End Endel Mon 08.00 22.00 4 Ved 08.00 22.00 4 Mon 08.00 22.00 4 Ved 08.00 22.00 4 Fin 08.00 22.00 4 Sun 108.00 22.00 4 Sun 108.00 22.00 4 Booking Strategy 20.00 4 Randomic Distribute (Masimice Groups Law) 1	Window: 1 Mar 2010 to 14 Mar 2010 [UTC +00:00] Europe/London Statt Date Time End Date Time 1 Mar 2010 08:00 1 Mar 2010 22:00 4	Build Dates
			L	Retrieve fresh data from WFM ✓ <u>Search</u> →
i 🗔 s	elect All 💢 Delete 🖉 Refresh 🖼 Export			
Еже	eptions 🧬 OK 🗳 Missing			
	chedule (0)			
		Seats A Trainer Employee ID # Liser:	# Attended # Completed Created 🐣 Name(s)	
	5			
0 Item	(s) ompletion Status			QK

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.

	Optimized Search Manual S Varking Hours (Local) Stat Enable Stat End Enable 08:00 22:00 Fr 08:00 20:00 Fr 08:00 20:00 Fr 08:00 20:00 Fr 09:00 20:00 Fr 10:00 20:00 Fr	Window: 1 Mar 2010 to 14 Mar 2010 Image: Image	po wi	lecting Build Dates will opulate the training ndows with the dates d start and end times.	Build Dates
Select All 💥 Delete 🧭 Refresh 🕁 Export Exceptions 🥥 OK 🥰 Missing Schedule (0) 🚾 Symc Status Start Date End Date 😒 Room Seats	new templa templates a selection fr	ve button to create a ate. Any existing are available for om the drop-down	а	Retrieve fresh data from WFM 🔽	<u>S</u> earch ⇒

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**.

Training Belo Event 1 - [Schedula Event] Resoucces Intemptible Activities Scheduling Options Optimized Search Manual S Optimized Search Algorithm Template Working Hours (Local) Stat End Enable Transition Time (inits) Image: Stat Mon B0800 Image: Stat End Enable Min. Activity Gap Betrie (minit) Image: Stat Fit Image: Stat Fit B000 Image: Stat Fit Performance Constraints Image: Stat Stat B000 Image: State Fit Fit B000 Image: State Fit Fit B000 Image: State Fit Fit Fit Fit Fit Fit B000 Image: State Fit Fit <th>Search Window: 1 Mar 2010 to 14 Mar 2010 Image: UIC + 00:001 Europer/London Image: UIC + 00:001 Europer/London Image: UIC + 00:001 Europer/London Stat: Date Time End Date Time Mar 2010 08:00 1 Mar 2010 22:00 3 Mar 2010 08:00 1 Mar 2010 22:00 4 Mar 2010 08:00 3 Mar 2010 22:00 5 Mar 2010 08:00 1 Mar 2010 22:00 7 Mar 2010 08:00 1 Mar 2010 22:00 9 Mar 2010 08:00 1 Mar 2010 22:00 11 Mar 2010 08:00 1 Mar 2010 22:00 12 Mar 2010 08:00 1 Mar 2010 22:00 13 Mar 2010 08:00 1 2 Mar 2010 22:00 13 Mar 2010 08:00 1 4 Mar 2010 22:00 14 Mar 2010 08:00 1 4 Mar 2010 22:00</th> <th>Build Dates</th>	Search Window: 1 Mar 2010 to 14 Mar 2010 Image: UIC + 00:001 Europer/London Image: UIC + 00:001 Europer/London Image: UIC + 00:001 Europer/London Stat: Date Time End Date Time Mar 2010 08:00 1 Mar 2010 22:00 3 Mar 2010 08:00 1 Mar 2010 22:00 4 Mar 2010 08:00 3 Mar 2010 22:00 5 Mar 2010 08:00 1 Mar 2010 22:00 7 Mar 2010 08:00 1 Mar 2010 22:00 9 Mar 2010 08:00 1 Mar 2010 22:00 11 Mar 2010 08:00 1 Mar 2010 22:00 12 Mar 2010 08:00 1 Mar 2010 22:00 13 Mar 2010 08:00 1 2 Mar 2010 22:00 13 Mar 2010 08:00 1 4 Mar 2010 22:00 14 Mar 2010 08:00 1 4 Mar 2010 22:00	Build Dates
Select All X Delete & Refresh R Export Exceptions I OK I Musing Schedule (0) III Sync Status Stat Date End Date Room Seats Trainer Employee ID II Users	s #Attended #Completed Credied Charle(a)	Retrieve fresh data from WFM 🔽 Search

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.

/ Training Help	_0 ×
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search	
Optimized Search Algorithm Template Working Hours (Local) Al days Ime 1 fravel Constraints Time 1 fravel Constraints Ime 1 fravel Constraints Transition Time (mins) Ime 1 fravel Constraints Min. Activity Gap After (mins) Ime 1 fravel Constraints Fin 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 200 Ime 1 fravel Constraints Sat 0000 Ime 2 0me 1	Build Dates
Retireve fresh data	from WFM ☑ Search ⇒
Schedule (0)	
👌 📠 Sync Slatus Stat Date End Date 🎒 Room Seats 🚑 Trainer Employee ID # Users # Altended # Completed Created 🗟 Name(i)	

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.

Event 1 - [Schedule Event]					
Resources Interruptible Activities Scheduling Option	s Optimised Search Manual S	earch			
Optimised Search Algorithm Template			D 11D 1		
<not set=""></not>		Window : II Jan 2013 to II Feb 2013	Build Dates		
Time & Travel Constraints Mon			4 D		
Transition Time (mins) 0 🚔 Tue					
Min. Activity Gap Before (mins)	00:00 🖨 00:00				
Min. Activity Gap After (mins) 0 🚔 Thu	00:00 🚖 00:00				
Trainer Travel 🔲 Fri	00:00 🚖 00:00 😒 🗵				
Performance Constraints Sat	00:00 🚔 00:00				
Coverage Tolerance 0 😴 % 🔲 Sun	00:00 🔹 00:00 🛬 🕅				
Rand	lomly Distribute				
Rand Back	lomly Distribute (Maximise Group Size) Load)	Retrieve fresh data from WFM 📝 Search 🔿		
Back	Load (Maximise Group Size) hise Coverage Disruption	/			
🗔 Select All 🗙 Delete 🖉 Refresh 🛃 Export					
Exceptions 🛃 OK 🎒 Missing					
Schedule (0)					
iEX Sync Status Start Date End Date 🛃 Room Seats	Trainer Employee ID # Users	# Attended # Completed Created 🚨 Name(s)			
0 Item(s)					
Completion Status			ОК		
IEX - Ready	Working House Working House Working House				

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.





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.

Event 1 - [Schedule Event]		_ 0
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search		
Optimized Search Algorithm Template Working Hours (Local) All day: Image: Algorithm Template Working Hours (Local) Time & Travel Constraints Find Enable Min. Activity Gap Beisre (min) Om Head Find Min. Activity Gap Beisre (min) Om Head Find Find Performance Constraints Find G800 min (2200 min) Find Stat Find		Build Dates
Select Al X Delete S Refresh 및 Export	Retrieve fresh data from WFM 🔽	<u>S</u> earch →
Exceptions of ok of Missing Schedule (0) Schedule (1) Schedule (1) Sc		d D
1 Rem(s)		
D Ren(s) Completion Status		۵K

Figure 101: Progress status

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

Optimised Search Algorithm			Working Hours (Local)	Window: 1	Mar 2010 to	14 Mar 201	1		Build	Dates
Time & Travel Cons Transition Time (mins) Min. Activity Gap Befor Min. Activity Gap After [Trainer Travel Performance Constit Coverage Tolerance Coverage Target [M	Image: Constraints 0 = 0 e (mins) 0 = 0 (mins) 0 = 0	Mon Tue Wed Thu Fri Sat Sun Booking			Image: Number of the second	0 08:00 0 08:00	Image Amage 1 Mar 2010 2 Mar 2010 2 Mar 2010 3 Mar 2010 4 Mar 2010 5 Mar 2010 6 Mar 2010 7 Mar 2010 7 Mar 2010 8 Mar 2010 10 Mar 2010 11 Mar 2010 12 Mar 2010 12 Mar 2010	Time 22:00 22:00 22:00 22:00 22:00 22:00 22:00 22:00 22:00 22:00 22:00 22:00 22:00			4.6
Define templates to con			nly Distribute (Maximise Gro rch algorithm.	oup S 💌	13 Mar 201 14 Mar 201	0 08:00	13 Mar 2010 14 Mar 2010	22:00 22:00			
)) Define templates to conf Select AI X Delete &	trol the behaviour of the D			sup S	13 Mar 201	0 08:00				Retrieve fresh data from WFM 🖉 🛐	earch ⇒
) Define templates to con	Refresh Report	ptimised Sear			13 Mar 201	0 08:00	14 Mar 2010		sted Created	Retrieve fresh data from WFM 🔽 🛐	gearch →

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.

Event I - [Schedule Event]												
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search												
Dpimiced Search Algorithm Template												
			Working Hours (Local)	Window :	I Mar 2010 to	14 Mar	2010				Build Dates
All days	•	🖬 🗙	Start End	Enable								
Time & Trave	l Constraints	Mon	08:00 🗧 22:00 🗧	~	_ [UTC	+00:00) Europe	/London					
Transition Time	(mins)	0 Tue	08:00 + 22:00 +	•	Start Date		End Date	Time				
Min. Activity Ga	p Before (mins)	0 Ved		~	1 Mar 201 2 Mar 201		1 Mar 2010 2 Mar 2010	22:00 22:00				
Min. Activity Ga		0 🗧 Thu	08:00 + 22:00 +	~	3 Mar 201	0 08:00	3 Mar 2010 4 Mar 2010	22:00				
Trainer Travel				N.	4 Mar 201 5 Mar 201	0 08:00	5 Mar 2010	22:00				
Trainer Traver		Fri	08:00 22:00 2		6 Mar 201 7 Mar 201		6 Mar 2010 7 Mar 2010	22:00 22:00				
Performance		Sat	08:00 22:00 2	v	8 Mar 201	0 08:00	8 Mar 2010	22:00				
Coverage Toler	ance 3 🗮	% 🗖 🛛 Sun	08:00 🗧 22:00 🗧	•	9 Mar 201 10 Mar 20		9 Mar 2010 10 Mar 201					
Coverage Targe	e MU		Strategy		11 Mar 20 12 Mar 20	10 08:00	11 Mar 201 12 Mar 201	0 22:00				
		Rando	mly Distribute (Maximise Gro	up S 💌	13 Mar 20	10 08:00	13 Mar 201	0 22:00				
 Define templates 	to control the behaviou	r of the Optimised Sea	arch algorithm.		14 Mar 20	10 08:00	14 Mar 201	0 22:00				
			-									
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: 🗔 Select All 🔀 Delet	a 🥂 Dafrach 🔲 I	Furnest										
		LADOR C										
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Schedule (5)												
EX Sync Status	Start Date	End Date	🛃 Room	Seats	👃 Trainer	Employee ID	# Users	# Attended	# Completed	Created	S Name(s)	<u> </u>
Event 1												
🐖 Training	2 Mar 2010 13:30	2 Mar 2010 14:30	Manchester Room 2	1.15	Charlie Dixon	23456	3	0	0	15 Aug 2012 16:50	First Base, Hortense Howard, Michael Crafts	man
💐 Training	9 Mar 2010 12:00	9 Mar 2010 13:00	Manchester Room 1	1-20	Charlie Dixon	23456	10	0	0	15 Aug 2012 16:50	Abigail Adams, Joe Default, Kelly Vargas, Kł	
Training	9 Mar 2010 14:15	9 Mar 2010 15:15	Manchester Room 2	1.15	Charlie Dixon	23456			0	15 Aug 2012 16:50	Gregory Parsons, Joe DePlummer, John Tho	
Training	12 Mar 2010 12:00	12 Mar 2010 13:00	Manchester Room 1	1-20	Charlie Dixon	23456	10	0	0	15 Aug 2012 16:50	Celia Sharpton, Glenda James, Howard Joh	
5 Item(s)												
Completion Status	1											<u>o</u> k
Comprehension Status												20
i <u>Ex</u> ▼ Ready											Wednesday, 15 August 2012 16:51 BST	Time Zone 9
es ▼												survey.

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

ent 1 - [Schedule Event]								-
Resources Interruptible Activities	Scheduling Options Optimised Search Manual S	earch						
Optimised Search Algorithm Template	W I' II <i>a</i> D	Window: 1 Mar 2010		2010				Build Dates
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Transition Time (mins)	08.00 - 122.00 -	Start Date Time	End Date	Time	1			
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		2 Mar 2010 08:00 3 Mar 2010 08:00						
Min. Activity Gap After (mins)	0 🛨 Thu 08:00 🛖 22:00 🛖 🗹	4 Mar 2010 08:00	4 Mar 2010	22:00				
Trainer Travel 🗖	Fri 08:00 🛨 22:00 🗮 🗹	5 Mar 2010 08:00 6 Mar 2010 08:00	6 Mar 2010	22:00				
Performance Constraints	Sat 08:00 🛨 22:00 🛨 🗹	7 Mar 2010 08:00 8 Mar 2010 08:00						
Coverage Tolerance 3 + 3	s 🗆 Sun 08:00 🗧 22:00 🗧 🗹	9 Mar 2010 08:00	9 Mar 2010	22:00				
	Basking Chattan	10 Mar 2010 08:00 11 Mar 2010 08:00						
Coverage Target MU	Randomly Distribute (Maximise Group S V	12 Mar 2010 08:00 13 Mar 2010 08:00						
		14 Mar 2010 08:00						
) Define templates to control the behaviour	of the Optimised Search algorithm.							
							Retrieve fresh data from WFM 🔽	<u>S</u> earch ⇒
ielect All 🔀 Delete 🧬 Refresh 🔙 E:	xport							
eptions 🥑 OK 🥰 Missing								
chedule (5)								
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vent 1								
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Fraining 9 Mar 2010 12:00	Click on Commentation	. Ctatura	10	0	0	15 Aug 2012 16:50	Abigail Adams, Joe Default, Kelly Vargas, H	
Training 9 Mar 2010 14:15	Click on Completio	n Status	9	0	0	15 Aug 2012 16:50	Gregory Parsons, Joe DePlummer, John Ti	
Training 12 Mar 2010 12:00			10	0	0	15 Aug 2012 16:50	Celia Sharpton, Glenda James, Howard Jo	
	to view any additio	nai						Þ
(5)	·							
	information.							
iompletion Status								<u>0</u> K
eadv							Wednesday, 15 August 2012 16:51 BST	Time Zone

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.

Event 1 - [Co	ompletion Sta	tus]									_	
Completion S	tatus											
Statistics for	this Event											
(# Trained /	60 80 100 # Scheduled) 100	Overall Completi 0.0%	on #Un #Tra	heduled ischeduled ained trained / Partially Trained		8 1 0 8						
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Training Se:												
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Start	Date 08 Aug	2012 💌	End Date 22 #	kug 2012 🛛 💌								
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🗹 Locatio	-	ement Unit		(
	Last Name	ement Unit	Location	Management Unit		Code		Start Date	End Date	🐣 Trainer	🐣 Trainer Emp.	
First Name	Last Name big number	ement Unit Employee ID 99999999	Location Manchester	London MU	Test Training Request	TTR001	Event 1					
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First Name	Last Name big number Adams agent Agent	ement Unit Employee ID 99999999 5013 247 5026	Manchester Manchester Manchester Manchester	London MU London MU London MU London MU	Test Training Request Test Training Request Test Training Request Test Training Request	TTROD1 TTROD1 TTROD1 TTROD1 TTROD1	Event 1 Event 1 Event 1 Event 1	9 Mar 2010 12:00 12 Mar 2010 14:30	9 Mar 2010 13:00 12 Mar 2010 15:30	Charlie Dixon Charlie Dixon	23456 23456	
First Name	Last Name big number Adams agent Agent Sharpton	ement Unit Employee ID 9999999 5013 247 5026 6005	Location Manchester Manchester Manchester Manchester Manchester	London MU London MU London MU London MU London MU	Test Training Request Test Training Request Test Training Request Test Training Request Test Training Request	TTR001 TTR001 TTR001 TTR001 TTR001 TTR001	Event 1 Event 1 Event 1 Event 1 Event 1	9 Mar 2010 12:00	9 Mar 2010 13:00	Charlie Dixon	23456	
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Location First Name Abigail Abigail Another Another Cela Charles Christop Diana	Last Name big number Adams agent Agent Sharpton Sharp Columbus Reed	ement Unit 99999939 5013 247 5026 6005 5014 5022 5033	Manchester Manchester Manchester Manchester Manchester Manchester Manchester Manchester	London MU London MU London MU London MU London MU London MU London MU London MU	Test Training Request Test Training Request Test Training Request Test Training Request Test Training Request Test Training Request Test Training Request	TTR001 TTR001 TTR001 TTR001 TTR001 TTR001 TTR001 TTR001 TTR001	Event 1 Event 1 Event 1 Event 1 Event 1 Event 1 Event 1 Event 1	9 Mar 2010 12:00 12 Mar 2010 14:30	9 Mar 2010 13:00 12 Mar 2010 15:30	Charlie Dixon Charlie Dixon	23456 23456	
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Figure 105: Exporting results to an Excel spreadsheet

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Columns Columns
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First Name Abigail Another Another Celia Charles Christop Diana Donna
First Name Abigail Abigail Another Another Another Charles Christop Diana

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.

😨 Event 1 - [Schedule Event]			<u>_ ×</u>
Resources Interruptible Activities Scheduling Options	Optimised Search Manual Sea	Search	
Optimized Search Algorithm Template: Ald days Time & Travel Constraints Transition Time (mins) Umin. Activity Bap Before (mins) Trainer Travel Fri Performance Constraints Coverage To letance Overage To letance Umin. Num Bookin	Working Hours (Local) Start End Enable @800 2200 # @800 2200 # @800 2200 # @800 2200 # @800 2200 # @800 2200 # @800 2200 # @800 2200 # @800 2200 # @800 2200 # @800 2200 # g Stategy mm Dubthbute Muserine Group S #	Window: 1 Mar 2010 to 14 Mar 2010 Image: UUTC +00.001 Europer/Lendon Image: UUTC +00.001 Europer/Lendon Image: UUTC +00.001 Europer/Lendon Europer/Lendon Image: UUTC +00.001 Europer/Leu	Build Dates
		Retrieve fresh data from WFM 🔽	<u>S</u> earch →
Event 1 Training 11 Mar 2010 08:45 11 Mar 2010 09:45		Trainer Employee ID # Users # Attended # Completed Created 📇 Name(s) Dison 23456 0 0 0 15 Aug 2012 11:27	d b
1 Item(s) Completion Status			ок
		Thursday, 15 August 2012 21:22 BST	

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.

Retrieve fresh data elect All X Delete & Refresh Export esptions @ OK @ Musing checkde [1] Sync Status Stat Date End Date & Room Seats & Trainer Employee ID # Users # Attended # Completed Created & Name(s) vent 1	Build Dates
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Interview inter	0
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Trainer Travel Fi 0000 2200 F Performance Constraints Sat 0000 2200 F Sat 0000 2200 F Sat 0000 2200 Sat 0000 2200 F Sat 0000 2200 F Coverage Tolerance 3 C Sun 0000 2200 F Bocking Stategy Bocking Stategy Bocking Stategy F 0000 11 Mar 2010 2200 11 Mar 2010 0000 12 Mar 2010 0000 11 Mar 2010 2200 12 Mar 2010 0000 12 Mar 2010 0000 11 Mar 2010 2200 13 Mar 2010 0000 12 Mar 2010 0000 12 Mar 2010 2200 13 Mar 2010 0000 14 Mar 2010 2200 13 Mar 2010 2200 14 Mar 2010 0000 14 Mar 2010 2200 14 Mar 2010 2200 14 Mar 2010 0000 14 Mar 2010 2200 14 Mar 2010 2200 14 Mar 2010 0000 14 Mar 2010 2200 14 Mar 2010	
Performance Constraints Set Set Set Yes 2010 0600 22.00 Yes Coverage Tokenance 3	
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Uverlage range MU Rendomly Distribute (Maximise Group S) 12 Mar 2010 08:00 12 Mar 2010 22:00 13 Mar 2010 08:00 12 Mar 2010 22:00 14 Mar 2010 08:00 14 Mar 2010 22:00 14 Mar 2010 08:00 14 Mar 2010 22:00 14 Mar 2010 08:00 14 Mar 2010 22:00 Retrieve fresh data	
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Training 11 M	
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se ^d Performance Data	
③ Attendance	
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Completion Status	٥ĸ

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.

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tem(s) <u>X D</u> elete			Publish automatically to WFM K

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

X Delete... button.

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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.

Optimised Search Algorithm Template			
All days 🗾 🛃 🗙	Working Hours (Local) Start End Enable	Window: 1 Mar 2010 to 14 Mar 2010	Build Dates
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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.

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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 Konet Delete...

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.

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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.

📴 Event 1 - [Schedule Event]	
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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.

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Opti	Completion Sta	tus											< >
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	🔤 Glenda	James	5006	Manchester		Test Training Request	TTR001	Event 1	12 May 2010 11:30	12 Mar 2010 12:30	Charlie Dixon	23456	
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	Raymond	Steele	5002	Manchester	London MU	Test Training Request	TTR001	Event 1	12 Mar 2010 11:30	12 Mar 2010 12:30	Charlie Dixon	23456	
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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.

Assessment Name Assessment Code Customer Service do not unassign their assessments as well. Customer Service Feedback assessment Number of days before each user's Training Session the Pre-Course Assessment is available. Marketing pre-course Sales Course Feedback Sales Techniques Sales Techniques	

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**.

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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.

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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.

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Coverage Target MU () Define templates to control the beh Select AI X Delete () Refresh meeptions () K () Heang Schedule (2)	Rank Ran	Som/v Distribute (Maximise	Group S 💌	1 11 Mi 12 Mi 13 Mi 14 Mi	# 2010 08:00 # 2010 08:00 # 2010 08:00 # 2010 08:00	12 Mar 2010 13 Mar 2010 14 Mar 2010	22:00 22:00 22:00			ve fresh data from \	wfm 🔽 Search
Coverage Target MU Define templates to control the beh Select AI X Delete & Refresh seseptions @ 0K @ Missing	Book Ran	domly Distribute (Maximise	Group S 💌	11 Ma 12 Ma 13 Ma	# 2010 08:00 # 2010 08:00 # 2010 08:00 # 2010 08:00	12 Mar 2010 13 Mar 2010 14 Mar 2010	22:00 22:00	Created	Retrie	ve fresh data from \	wfm 🔽 Searc
Coverage Target MU Define templates to control the beh Select AI X Delete & Refresh receptions @ 0K @ Hearing Schedule [2] Z Sync Statur [Stat Date	Rank Ran	Som/v Distribute (Maximise	Group S 💌	1 11 Mi 12 Mi 13 Mi 14 Mi	# 2010 08:00 # 2010 08:00 # 2010 08:00 # 2010 08:00	12 Mar 2010 13 Mar 2010 14 Mar 2010	22:00 22:00 22:00	Created 16 Aug 2012 11:43 16 Aug 2012 12:13	📇 Name(s)		WFM 🔽 Search

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.

anna tép	
vent i - [Schedule Event]	
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search	
Statu Date: 👄 16 Aug 2012 🔍 🔿 Pytomance Data	
Start Time End ##xvalable (0) Click a sick in the fat to see the Performance Data during that slot.	
In the second se	
Specify the date to	
search.	
Search ⇒	
8) Find slots manually for Training delivery. Manual searches ignore all Time & Travel Constraints, Petformance Constraints and Trainer working hours.	
j Select All 💥 Delete 🖇 Refresh. 🙀 Export	
Exceptions of OK of Missing	
· · · · · · · · · · · · · · · · · · ·	
Schedule (2)	
📧 S. no Cratus Stat Date End Date 🛃 R om Seats 🚨 T xine Employee 1D # Users # Altended # Completed Created 🙇 N met Event 1	-
📲 Training 4 Mar 2010 11.45 4 Mar 2010 12.45 Manchester Room 2 0-15 Chanlie Dixon 23456 1 0 0 16 Aug 2012 12.13 Abigail Adams	
Training + His 2010 11-0 + His 2010 249 marchine hours of the chaine board of the chai	e
4	
ten(s)	
Completion Status	
Resdy Thurday, 16 August 2012 (21) BBT Ime Zone.	4 .::

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.

, Iraining Help				
🚾 Event 1 - [Schedule Event]				
Resources Interruptible Activities Scheduling Options	Optimised Search Manual Search			
Start Time End # Available Monday, 1 March 2010 Click a st	ot in the list to see the Performance Data during that :	slot.		
06:30 07:30 1	Highlight the			
0 05:45 07:45 1				
07:00 08:00 1 07:15 08:15 2	time slot.			
07:30 08:30 2				
07:45 08:45 1 08:00 09:00 1				
0 08:15 09:15 1				
0 08:30 09:30 1				
08:45 09:45 2 09:00 10:00 3				
0 09:15 10:15 3				
09:30 10:30 3 0 09:45 10:45 3				
Show All Search ⇒				
W Find slots manually for Training delivery. Manual searches ignore	all Time & Travel Constraints, Petromance Constrain	nts and Trainer working hours.		
🗔 Select All 💢 Delete 🖉 Refresh 🚽 Export				
Exceptions 🔐 OK 🎒 Missing				
Enceptions and on any Missing				
Schedule (2)				d D
EX Sinc Status Start Date End Date	🛃 Rom 🛛 Seats 🐣 Txine	Employee ID # Users # Atten	ided # Completed Created	🐣 N met)
Event 1				
🌱 Training 4 Mar 2010 11:45 4 Mar 2010 12:45	Manchester Room 2 0-15 Charlie Dixon	23456 1 0	0 16 Aug 2012 12:13	Abigail Adams
🌌 Training 12 Mar 2010 11:30 12 Mar 2010 12:30	Manchester Room 2 0-15 Charlie Dixon	23456 5 0	0 16 Aug 2012 11:43	Glenda James, Gregory Parsons, Raymond Steele, Ricki Glove
2 Item(s)				
Completion Status				<u>o</u> k

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.

<u>⊺</u> raining	Help													
😨 Event 1	- [Schedule Event]													<u>- 🗆 ×</u>
1 - 1														
Reso	🛃 Training Session												- D ×	
Start D	Details													
Start	Training Request	Test Training Re	equest (TTR001)					1						
Moi	Event	Event 1						ĩ						
0 00	Trainer	<none></none>			Start Date	01 Mar 2010 💌 0	7:30 🛨	_						
0 00	Room	(None)					8:30 ÷							
07		Cindinez												
0 07	In Training Session -	* Bold = Not Sa	ved				Not In Training	Session						
07	Columns						Columns							
00 (0) 08		nagement Unit					Location	n 🗹 Mana	gement Unit					
0.08		1	1	(<u></u>	1	1	[<u></u>	
08 🕕	Classic Lance	me Employee ID 5006	Manchester	London MU	ient Unit 🥎 🛛	🛃 < Export	First Name	Last Name Adams	Employee ID 5013	Manchester	London MU	ment Unit 🤡	Start Date 4 Mar 2010	
09	🔊 Pieki Glover		Manchester	London MU			Charles	Sharp	5014	Manchester	London MU			
0.09							Gregory	Parsons Steele	5002 5004	Manchester Manchester	London MU London MU		12 Mar 201 12 Mar 201	
en 🕥							Ricky	Steele Glove Jr	5004	Manchester	London MU London MU		12 Mar 201 12 Mar 201	
🗆 s							· ·							
🕑 Fi														
						< Add								
: 🗔 Seleci						Remove >								
Except														
Sche														
EX S														
Even														_
🚅 Traii														
Train														d Glove
						Export >							F	
2 Item(s)	,													
Comp									Pi	ublish automatically	to WFM	<u>o</u> k	<u>Cancel</u>	к
<u>≣x</u> + Ready											Thursday, 16 Aug	ust 2012 12:22 B	ST <u>Time Zo</u>	<u>ne</u> 🍕:

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 stepby-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 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.).

Training Manager	- a	×
File View Training Tools Help		
Main Menu	- Meeting Files	_
Real Training Manager		
Training Requests	Enable Status Fiter	
Meetings	Database Tupe Riter	
A 2 Resource Calendars		
Room Calendars	Show items needing critical attention 3 😓 days warning (Dnly applies to Meetings with Recurrence)	
Trainer Calendars	Show tems needing attention soon 10 👌 days warning (Drly applies to Meetings with Recurrence)	
a Manager Calendars	Show tems needing no attention	
a 🎲 Configuration		
🖌 🔣 Training Manager	Only show items without Next Dates	
Training Categories	\frown	
Meeting Types	🕜 New Meeting 🗘 Check All 🗶 Delete 🖉 Refresh 🍈 Next Dates 👿 Optimised Searches	
Booking Categories	N. 1. 5. 8. M. & E. II. L. % T. # T. II. S. S. E. T. N. N. D. R. L.	
Selection & Exclusion		
A B Resources		_
Rooms & Locations Trainers		-
Trainers Skills		-
Managers		
Training Manager Portal		_
WFM		-
		-
		_
		-
		-
		-
Sub Menu		_
a III Meetings		-
Viewing by Location		-1
In the location		
🖌 🛄 London		_
Kelly Smith		-
B Paul Scholes		
b 🧾 New York		
Ji San Francisco		_
🚊 Solihull		-
b jj Tokyo		-
		port
Preferences *	Meeting Count: 0	



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.

)etails		
Main Title * Meeting Type * Description and Objectives *		Enter a main title and use the drop down list to select the correct meeting type. Enter a mandatory description.
Manager * Location * Status	Pending Approval Notify participants by email The Status setting will affect whether meetings will appear in Portal.	Select the manager from the Manager drop down box. The Location field will be automatically populated based on your manager selection and will contain all of the locations to which the selected manager has been assigned.
Jates	will appear in Fortal.	Select the Earliest Start and Latest End date. If
Start Date	07 Mar 2014 End Date 07 Mar 2014	this meeting will be used as a template the date/time frame defined here will be used for future scheduling.
imes		
Earliest Start Time	00:00	5 7
	Inis time range applies to every day in the above Date range.	

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.

Selection Global Exclusions
Display Mode WFM Hierarchical
Remove team leavers automatically 🔽 Full team synchronisation
🖌 📥 Blue Sky Airlines
🖌 📃 London
⊳ 🔲 📸 <none></none>
⊳ 🗹 📸 UK_Supervisor A
⊳ 🔲 📸 UK_Supervisor B
⊳ 🔲 📸 UK_Supervisor C
⊳ 🔲 📸 UK_Supervisor D
New York
San Francisco
⊳ 📥 Test Business Unit

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.

Meetings

Int User Selection Meeting Scheduler Workforce Management	
) Choose Rooms, Interruptible Activities, set up constraints, recurrence options and perform the search.	
Resources Interruptible Activities Optimised Search Manual Search	٩ ۵
View Active Rooms C View Inactive Rooms	
🖌 🕕 Internal	
🚊 <no location=""></no>	
Atlanta	
J Glasgow	
Include I	
Manchester	
Manchester Room 2	
S Manchester Room 3	

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.

Start User Selection Meeting Scheduler Workforce Management
Ochoose Rooms, Interruptible Activities, set up constraints, recurrence options and perform the search.
Resources Interruptible Activities Optimised Search Manual Search
View Active Rooms O View Inactive Rooms
🖌 🕕 Internal
🛄 <no location=""></no>
Atlanta
A Glasgow
London
🖌 🛄 Manchester
🔲 🛃 Manchester Room 1
Manchester Room 2
Manchester Room 3

Figure 132: Resources tab

13.1.2.2 Interruptible Activities

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

Ohoose Rooms, Interruptible Activities, set up constraints, recurrence options and perform the search.
Resources Interruptible Activities Optimised Search Manual Search
Activity
Activity
 BillingGoldChat BillingGoldEmail BillingGoldVoice BillingSilverChat BillingSilverEmail BillingSilverVoice LostLuggage LostLuggage LoyaltyCard MileageCredit VacationPackages
Activity Set
MultiMedia_Activities
Meal
unch

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.

sources Interruptible Activities Optimised Se	arch Manual Search	
Time Constraints	Recurrence	
Transition Time (mins) 0 (2) Min. Activity Gap Before (mins) 0 (2) Min. Activity Gap After (mins) 0 (2) Min. Gap Between Sessions (days) 0 (2) Performance Constraints 0 (2) Coverage Tolerance 0 (2) Ste (Forecast) •	Daly Monday Tuesday Weekdy Wednesday Thursday Monthly Fielday Saturday Sunday Recurrence period 1/2	
Attendance Constraints Min. % of Attendees Required 100 (4)	Booking Strategy	

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.

Recurrence		
Daily	Monday	Tuesday
Weekly	Wednesday	Thursday
Monthly	Friday	Saturday
	Sunday	
Recurrence per	riod: 1 🚔	
Recurrence will	try to book a meeting o	nce within each recurrence period on any of the days that are ticked between the Start Date and End Date.

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.

	Start User Selection Meeting Scheduler	Workforce Management		
	Choose Rooms, Interruptible Activities, set up or	instraints, recurrence options and perform the search.		
	Resources Interruptible Activities Op	inised Search Manual Search	d D	
	Start Date : 🦛 01 Mar 2010 💌 🔿	Performance Data		
	Start Time End #Available	Ø Click a slot in the list to see the Performance Data during that slot.		
1				
	<u>Search</u> ⇒			
	Ø Find slots manually. Manual searches ignor	e al constraints and manager working nouts.		

Figure 136: Manually creating a meeting

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

Start User Selection Meeting Scheduler Workforce Management	0 D
Choose Rooms, Interruptible Activities, set up constraints, recurrence options and perform the search.	
Resources Interruptible Activities Optimised Search Manual Search Ø D	
Start Date : 📁 01 Mar 2010 🔍 📦 Performance Data	
Start Time End # Available WOnday, 1 March 2010	
0 08:30 09:00 1	
10:30 11:40 1 10:45 11:15 1	
0 11:00 11:30 1	
0 11:15 11:45 1 0 11:30 12:00 1	
0 11:45 12:15 1 0 12:00 12:30 1	
0 1215 1245 1	
0 12:30 13:00 1 0 12:45 13:15 1	
0 13:00 13:30 1 0 13:15 13:45 1	
0 13.30 14:00 1	
0 13:45 14:15 1 0 14:00 14:30 1	
14:15 14:45 1 1 1 1 1 1	
0 14:45 15:15 1	
0 15:00 15:30 1 0 15:15 15:45 1	
0 16:00 16:30 1	
0 16:15 16:45 1 0 16:30 17:00 1	
0 16.45 17.15 1 0 17.00 17.30 1	
A 17.4E 17.4E 1	
Show Al Second and Se	

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.

Meeting Se	ssion				_ 🗆 🗵
Details					
r Meeting	Team Meeting				
. Manager	<none></none>	Start Date 01 Mar 2010	▼ 13:15 ÷		
Room	<none></none>	End Date 01 Mar 2010	13:45		
In Meeting -	* Bold = Not Saved			Not In Meeting	
Columns	bold - Not Saved			Columns	
	n 🔽 Management Unit			🔽 Location 🔽 Management Unit	
First Name	Last Name Employee ID 🔝 Location 🥥 Manageme	ntlinit	-	First Name Last Name Employee ID 🔔 Location 🕼 Management Unit Exclusion Reason	
	Howard 5003 Manchester London MU	in one	Report Compared Report	Ronald Ross 5005 Manchester London MU	
1					
5					
6			< Add Remove >		
			- Helliove /		
•					
ä					
5					
3					
			🛃 Export >		
,				Publish automatically to WFM 🔽 <u>O</u> K <u>C</u> ar	ncel /

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.

Meeting Session		_ 🗆 ×
Details		
Meeting Team Meeting		
	Start Date 01 Mar 2010 13:15	
	End Date 01 Mar 2010 13:45	
In Meeting - * Bold = Not Saved	Not in Meeting	
Columns		
V Location V Management Unit	View Active Managers View Inactive Managers	
First Name Last Name Employee ID 🔝 Location 🥥 Management I		Management Unit Exclusion Reason
Hortense Howard 5003 Manchester London MU	Manchester Lond	lon MU
	<u>DK</u> <u>Cancel</u>	
	///	
	Export>	
	Publish automa	etically to WFM 🔽 <u>O</u> K <u>Cancel</u>

Figure 139: Selecting a manager for the meeting

13.1.3 Workforce Management

Select the Workforce Management tab to reveal the suggested meetings.

	Sta	rt User Selection	Meeting Scheduk	workforce Mana	gement					4.0
	Ø	View all Meetings and	d synchronization status	with Workforce Manage	ment					
		Meeting Sessions	Status							d D
		🗔 Select All 🔀 Dele	ete 🥩 Refresh 🔒	Export						
		Exceptions 🧃 OK	🗐 Missing							
		C Enable Date Filte Start Date 01		End Date 08 Mar 201	0 💌					
		Schedule (2)								d D
		EX Sync Status	2 Mar 2010 09:00	End Date 2 Mar 2010 09:30	None>	Seats 🚨 M n/a Rogerl	mployee ID # Users 6		Abigail Adams, Glenda James	<u>.</u>
		🌱 Meeting 🌱 Meeting	2 Mar 2010 08:00 8 Mar 2010 08:00	2 Mar 2010 08:30 8 Mar 2010 08:30		n/a Rogeri n/a Rogeri	2	16 Aug 2012 19:49 16 Aug 2012 19:49	Abigail Adams, Glenda James Abigail Adams, Ricky Glove J	
_										
-										
		•								
	2	Item(s)								
								< Previous	Next > Apply	Close

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.

Meeting Sess Meeting Us Meeting Se	r Status								4
-									
-									
meeting of									
🗆 Enable	Date Filter								
Start	ate 09 Aug 2012	End Date	23 Aun 2012 💌						
	do Mag 2012		to Mug zonz						
Enable	Status Filter								
	▼ 22	Refresh							
		rieliesii							
Columns									
	n 🔽 Management Unit								
	n 🗹 Management Unit								
	n 🗹 Management Unit) 🔜 Location	🍯 Management Unit	🚖 Meeting	Start Date	End Date	🚇 Manager	🔗 Manager Emp ID	
C Locati	-) 🔝 Location	Management Unit		Start Date 8 Mar 2010 08:00	End Date 8 Mar 2010 08:30			Si (Nc
🗹 Locati	Last Name Employee ID			Meeting Team Meeting Team Meeting			Boger Harlan	Manager Emp.ID	
✓ Locati First Name Abigai	Last Name Employee ID Adams 5013	Manchester	London MU	Team Meeting	8 Mar 2010 08:00	8 Mar 2010 08:30	Roger Harlan	roger	<nc< td=""></nc<>
First Name Abigai Abigai Charles	Last Name Employee ID Adams 5013 Adams 5013 Sharp 5014	Manchester Manchester Manchester	London MU London MU London MU	Team Meeting Team Meeting Team Meeting	8 Mar 2010 08:00 2 Mar 2010 09:00	8 Mar 2010 08:30 2 Mar 2010 09:30	Roger Harlan Roger Harlan	roger roger	<nc <nc< td=""></nc<></nc
First Name Abigail Abigail Charles Glenda	Last Name Employee ID Adams 5013 Adams 5013 Sharp 5014 James 5006	Manchester Manchester Manchester Manchester	London MU London MU London MU London MU	Team Meeting Team Meeting Team Meeting Team Meeting	8 Mar 2010 08:00 2 Mar 2010 09:00 2 Mar 2010 09:00	8 Mar 2010 08:30 2 Mar 2010 09:30 2 Mar 2010 09:30	Roger Harlan Roger Harlan Roger Harlan	roger roger roger	<nc <nc <nc< td=""></nc<></nc </nc
Locati First Name Abigail Chatles Glenda Gregory	Last Name Employee ID Adams 5013 Adams 5013 Sharp 5014	Manchester Manchester Manchester	London MU London MU London MU	Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting	8 Mar 2010 08:00 2 Mar 2010 09:00	8 Mar 2010 08:30 2 Mar 2010 09:30	Roger Harlan Roger Harlan Roger Harlan Roger Harlan	roger roger roger	<nc <nc <nc <nc< td=""></nc<></nc </nc </nc
Locati First Name Abigai Abigai Charles Glenda Gregory Raymond	Last Name Employee ID Adams 5013 Adams 5013 Sharp 5014 James 5006 Parsons 5002 Steele 5004	Manchester Manchester Manchester Manchester Manchester Manchester	London MU London MU London MU London MU London MU London MU	Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting	8 Mar 2010 08:00 2 Mar 2010 09:00 2 Mar 2010 09:00 2 Mar 2010 09:00 2 Mar 2010 09:00 2 Mar 2010 09:00	8 Mar 2010 08:30 2 Mar 2010 09:30 2 Mar 2010 09:30 2 Mar 2010 09:30 2 Mar 2010 09:30 2 Mar 2010 09:30	Roger Harlan Roger Harlan Roger Harlan Roger Harlan Roger Harlan	roger roger roger roger roger	<nc <nc <nc <nc <nc< td=""></nc<></nc </nc </nc </nc
Locati First Name Abigai Abigai Charles Glenda Gregory Raymonc Ricki	Last Name Employee ID Adams 5013 Adams 5013 Sharp 5014 James 5006 Parsons 5002 Steple 5004 Glover 5009	Manchester Manchester Manchester Manchester Manchester Manchester Manchester	London MU London MU London MU London MU London MU London MU London MU	Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting	8 Mar 2010 08:00 2 Mar 2010 09:00 2 Mar 2010 09:00 2 Mar 2010 09:00 2 Mar 2010 09:00 2 Mar 2010 09:00	8 Mar 2010 08:30 2 Mar 2010 09:30 2 Mar 2010 09:30 2 Mar 2010 09:30 2 Mar 2010 09:30 2 Mar 2010 09:30	Roger Harlan Roger Harlan Roger Harlan Roger Harlan Roger Harlan Roger Harlan	roger roger roger roger roger roger	<nc <nc <nc <nc <nc <nc <nc< td=""></nc<></nc </nc </nc </nc </nc </nc
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Figure 141: Display of scheduled meeting report

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

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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.

Start User Selection Meeting Scheduler Workforce Management	
View all Meetings and synchronization status with Workforce Management.	
Meeting Sessions Status	
Get All ¥ Delete ₿ Refresh 🛃 Export	
Exceptions 🗊 OK 💕 Missing	
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Schedule (2)	
📧 Sync Status 🎢 Start Dale End Date 💁 Room Seats 💩 Manager 💩 Employee ID # Users Created 🔅 Nu Meaning 2M - 2010 (19.00 2M or 2010 (9.30 < None> rv/a Roger Halan roger 6 16 Aug 2012 19.49 Abigal A	ame(s) Adams, Glenda James, Gregor
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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.

E E	able Type Filter					¥						
		1										
		g critical attention			ng (Only applies to M							
	ow items needin ow items needin	g attention soon	10	🛨 days warni	ng (Only applies to M	eetings with Hecurre	ince)					
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0	ly show items wi	thout Next Dates										
New	Meeting 🗔 C	berk All 🔀 Dele	te 2	Refresh 🚳 N	ext Dates 📰 Opl	timised Searches						
		Туре			Employee ID		End Date	Next Start Date	Next End Date	Duration (Minutes)	Recurrence	Information
8				Roger Harlan		1 Mar 2010 08:00	8 Mar 2010 22:00			30		OK

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.
Meeting Filter	IS	_											
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Enable 1	Гуре	Filte	n				<u>v</u>						
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i Only and	w ke		Michola Next Didite	,									
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tatus Main	Title		Туре	Status	💁 Manager bger Harlan	Employee ID	Start Date	End Date 8 Mar 2010 22:00	Next Start Date	Next End Date	Duration (Minutes) 30	Recurrence	Information
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			ext Dates	,									
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	×	D	elete Meeting										
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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.

Meetings

3. Duplicate Meeting	- • •
Clease one meeting par team	
Selection Global Exclusions	
Daping Mole Hararchical	
Remove team leaves automatically Full team synchronization	
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0 Selected	Clear Cancel

Figure 146: Copying a scheduled meeting to other teams

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

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Nou	v Meeting 🗔 Check All 🛛	V Dalata 🖉 D	lafrach (Allowt Dates	Continuined Security	~					
	Main Title	Type		A Manager	Employee ID		End Date	Nevt Start Date	Next End Date	Duration (Minutes)	Becurrence
	Copy of Team Meeting	Team Meeting		Roger Harlan	roger	1 Mar 2010 08:00	8 Mar 2010 22:00	These start bate	HOM END DUIC		Weekly (Mon
	Team Meeting	Team Meeting	Active	Roger Harlan	roger	1 Mar 2010 08:00	8 Mar 2010 22:00			30	Weekly (Mon,

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.

-									
Meeting Filters									
Enable Stat	itus Filter		7						
Enable Typ	- 54		¥						
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Show items	s needing critical attention 3	_	applies to Meetings with R						
Show items	s needing attention soon 10	🕂 days warning (Only	applies to Meetings with Re	ecurrence)					
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Dolu show i	items without Next Dates								
- ony onorr									
New Meeting	g 🗔 Check All 🔀 Delete 💈	🐉 Refresh 🎲 Next Date:	s 😨 Optimised Search	es					
tatus 🛛 Main Tit		Status 🚨 Manag			End Date	Next Start Date	Next End Date	Duration (Minutes)	
Copy of	New Meeting	tive Roger Harla		1 Mar 2010 08:00	8 Mar 2010 22:00			30	Weekly (Mo
Team M		ive Roger Harla	n roger	1 Mar 2010 08:00	8 Mar 2010 22:00			30	Weekly (Mo
-	🔗 Edit Meeting								
	T Rename Meeting								
	冯 Duplicate Meeting								
	Next Dates								
	💢 Delete Meeting								

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**.

Meeting	-										
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C Or	nly show items with	hout Next Dates									
🎦 New	Meeting 🗔 Chi	eck All 🔀 Delete.	<i>ฮ</i> Re	fresh 🍈 Next Da	ates 😨 Optimised	Searches					
	Main Title	Туре		🚨 Manager	🚳 Employee ID		End Date	Next Start Date	Next End Date	Duration (Minutes)	
	Team Meeting	Team Meeting		Diana Li	Diana	1 Mar 2010 08:00	8 Mar 2010 22:00			30	Weekly (Mon, Tue, W
	Team Meeting	Team Meeting	Active	Roger Harlan	roger	1 Mar 2010 08:00	8 Mar 2010 22:00			30	Weekly (Mon,Tue,W
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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.

Start User Selection Meeting Scheduler Workforce Management	٩ ٢
View all Meetings and synchronization status with Workforce Management.	
Meeting Sessions Status	4 D
Select Al 🗙 Delete 🖉 Refresh 🔒 Export	
Exceptions 🗊 OK 🗳 Missing	
₩ Enable Date Filter	
Stat Date 01 Mar 2010 💌 End Date 08 Mar 2010 💌	
Schedule (1)	
👿 Sync Status 🎁 Start Date End Date 🧖 Room Seats 🖉 Manager 🗟 Employee ID # Users Created 🖉 Name(s)	rd, Ronald Ross
1 Ren(s)	
< <u>Previous</u> <u>New</u>	t> Apply Close

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.

Meeting	g Filters										
🗆 En	nable Status Filter					¥					
🗆 En	nable Type Filter					Y					
🔽 Sh	now items needing	critical attention	3 🕂	days warning (Or	nly applies to Meetings	with Recurrence)					
🔽 Sh	- now items needing	attention soon	10 -	days warning (Or	nly applies to Meetings	with Recurrence)					
	now items needing		110 1								
le sn	10W Kems needing	no attention									
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	iy onorr komo ma	iout Holk D 0.00									
·		ul All 😽 Dalata	a b	Count Contractor	ites 💌 Optimised	Country of					
_		1.1					,				
	Main Title	Туре	Status		S Employee ID		End Date	Next Start Date	Next End Date	Duration (Minutes)	
	Team Meeting Team Meeting	Team Meeting Team Meeting		Diana Li Roger Harlan	Diana	1 Mar 2010 08:00 1 Mar 2010 08:00	8 Mar 2010 22:00 8 Mar 2010 22:00			30 30	Weekly (Mon, Tue, V Weekly (Mon, Tue, V
⊴ 🔼	I earn Meeting	I eam Meeting	Active	Roger Hatlan	roger	1 Mar 2010 08:00	8 Mar 2010 22:00			30	Weekly (Mon, Lue, V
		Meeting Nex	t Dates			×					
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		Suggest Net	ext Dates	for all checked Mee	etinas						
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		C Apply Next	Dates for	all checked Meetin	igs						
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Figure 151: Meeting next dates message

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

Meeting Filters		_								_
Enable Status Filter					¥.					
					_					
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itatus Main Title	Type Team Meeting		Anager Diana Li	Diana Employee ID	1 Mar 2010 08:00	End Date 8 Mar 2010 22:00	Next Start Date 17 Aug 2012 08:00	Next End Date 24 Aug 2012 22:00	Duration (Minutes) 30	Weekk
2 🧿 Team Meeting	Team Meeting		Roger Harlan	roger	1 Mar 2010 08:00	8 Mar 2010 22:00	17 Aug 2012 08:00	24 Aug 2012 22:00	30	Weekly
		SkillsPl	lanner	×						
		(i)	2 Masting h	ave been affected.						
		4	2 Meetings h	sve been arrected.						
			CK OK							

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.

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	Main Title Team Meeting	Type Team Meeting		Manager Diana Li	Employee ID Diana	Start Date 1 Mar 2010 08:00	End Date 8 Mar 2010 22:00	Next Start Date 17 Aug 2012 08:00	Next End Date 24 Aug 2012 22:00	Duration (Minutes)	Recurrent Weekly
	Team Meeting	Team Meeting		Roger Hatlan	roger	1 Mar 2010 08:00	8 Mar 2010 22:00	17 Aug 2012 08:00	24 Aug 2012 22:00	30	Weekly
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					<u>0</u> K	Cancel					

Figure 153: Confirming next meeting dates

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Status	Main Title	Туре	Status	Anager	S Employee ID		EndDate	Next Start Date	Next End Date	Duration (Minutes)	
	Team Meeting	Team Meeting		Diana Li	Diana	17 Aug 2012 08:00	24 Aug 2012 22:00			30	Weekly (Mon, Tue, W
v 🕛	Team Meeting	Team Meeting	Active	Roger Harlan	roger	17 Aug 2012 08:00	24 Aug 2012 22:00			30	Weekly (Mon, Tue, W
			SkillsP	lanner	×						
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				OK OK							
				<u></u>							

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

Skills Resources Interruptible Activities Scheduling Options Optimised Search Manual Search
Scheduling Options
Duration (HH:mm) 00:30
Includes trainer lunch break
Repeat Days 1
Min. Group Size 1
Max. Group Size 9999
✓ Keep Teams Together ✓ Backfill
Notify participants by email
Options
Save 🔀 Cancel

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.

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Figure 157: Display of training session details

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

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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.

Standard View Planner View				
Search		Start Date 27/11/2017	End Date 17/12/2017	Sort By Trainer V Go
Go to Advanced Search				
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Friday, 08 December 2017				
08:00 - 12:00 GMT	Class Training (Class 3)	Trainer: Briony Christopher	/ Room: Training Room 2 / Attendees:	4 / Max. Seating: 10
Training Request : Sriony Ch	ristopher			
🕼 Training Event : Class 3 🗐 Room : Training R	loom 2			
Add To Calendar				



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).

Status	Pending Approval	•
	Notify participants by email	

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.

- Scheduling Options
Duration (HH:mm) 01:00
Includes trainer lunch break
Repeat Days 1 🗮
Min. Group Size 0 🗮
Max. Group Size 0 🗮
Keep teams together
✓ Notify participants by email

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.

File View Training Tools Help														
Main Menu		11												
a 🛃 Training Manager	Master Schedule	Scenari	105											
Training Requests	Training Session F	iters												
Completion Status	Enable Date F	-												
Reports		nter		5 J.O. J										
Reports	Start Date 27/11/2017			End Date 11/12/2017										
Meetings Meetings Meetings Meetings				11/12/2017										
	Enable Status	Fiter												
Room Calendars	Unschedule	ed	Ø Refres	h										
🚨 Trainer Calendars			ng Session for the											
a Manager Calendars	Le. Not yet i	n any trainir	ng Session for the	Event										
Gonfiguration	Columns													
🖌 😴 Training Manager	Location V	Team	刁 Site I∽ Bus	iness Unit										
Training Categories														
Meeting Types				-	aa -		0			0.0				
Booking Categories			Employee ID	Location	欎 Team	🗐 Site	🚔 Business Unit			-	Start Date	End Date	Search Trainer	A Trainer Emp
A Selection & Exclusion			UK_Agent_047		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3		23 Oct 2017 12		
Resources			UK_Agent_035		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3		10 Oct 2017 12		
Booms & Locations			UK_Agent_005 UK_Agent_011		Paul Scholes Paul Scholes	London London	Blue Sky Airlines Blue Sky Airlines	Class Training Class Training	Class 3 Class 3	Class 3 Class 3			Briony Christopher Briony Christopher	
Trainers			UK Agent_012		Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3 Class 3	Class 3	5 00 2017 08.00	500 2017 12.00	Briony Christopher	102373
Trainer Skills			UK Agent 034		Kelly Smith	London	Blue Sky Arlines	Class Training	Class 3	Class 3 Class 3	11 Oct 2017 08	11 0rt 2017 12	Briony Christopher	182579
Managers			UK Agent 073			London	Blue Sky Airlines	Class Training	Class 3	Class 3		15 Oct 2017 12		
	Matthew F		UK_Agent_019		Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher	
S Training Manager Portal	Matthew I	McSeve	UK_Agent_028	London	Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3	8 Dec 2017 08:	8 Dec 2017 12:	Briony Christopher	182579
B WFM		Natts	UK_Agent_018	London	Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3				
			UK_Agent_028		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher	
			UK_Agent_031		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3	15 Oct 2017 08	15 Oct 2017 12	Briony Christopher	182579
			UK_Agent_065		Frank Lampard	London	Blue Sky Airlines	Class Training	Class 3	Class 3				
			UK_Agent_037		Kelly Smith Paul Scholes	London	Blue Sky Airlines Blue Sky Airlines	Class Training	Class 3	Class 3 Class 3			Briony Christopher	400570
			UK_Agent_013 UK Agent 048		Kelly Smith	London	Blue Sky Annes Blue Sky Airlines	Class Training Class Training	Class 3 Class 3	Class 3		4 Oct 2017 12:00		
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			UK Agent 048		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3		8 Dec 2017 12		
			UK_Agent_017		Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher	
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ub Menu	Rob /	Nan	UK_Agent_070	London	Frank Lampard	London	Blue Sky Airlines	Class Training	Class 3	Class 3	10 Oct 2017 08	10 Oct 2017 12	Briony Christopher	182579
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Viewing by Training Requests			UK_Agent_030		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher	
4 Sep 2017 - 4 Jan 2018			UK_Agent_055			London	Blue Sky Airlines	Class Training	Class 3	Class 3	8 Oct 2017 08:00	8 Oct 2017 12:00	Briony Christopher	182579
 4 Sep 2017 - 4 Jan 2018 			UK_Agent_020		Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3				
			UK_Agent_071			London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher	
New product			UK_Agent_042		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher	
Interpretations			UK_Agent_045 UK Agent 051		Kelly Smith Frank Lampard	London	Blue Sky Airlines Blue Sky Airlines	Class Training Class Training	Class 3 Class 3	Class 3 Class 3		10 Oct 2017 12	Briony Christopher	

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**.

File View Training Tools Help																-	8
Main Menu		Master Schedule Sce	enarios														
A STraining Manager		Statistics for this Event															
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			Overall Completion		cheduled												
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Meetings		100	5.5 %	# Trai	ned			3									
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Room Calendars		(# trained / # Scheduled) # 100															
Trainer Calendars										60	lact T	raini	an Da	aucto	. –		
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Booking Categories		Enable Status Filter								ct-	itus.						
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A Resources		i.e. Not yet in any T	aining Session for the	Event													
Rooms & Locations		Columna															
🖌 🔝 Trainers																	
Trainer Skills		Location 🗹 Team	🗹 Site 🗹 Busi	iness Unit													
Managers																	
📑 Training Manager Portal		First Name Last Nam	me Employee ID	Location	🙀 Team	Ste	📥 Business Unit	Training Request	🝓 Code	Event	Start Date	End Date	🚨 Trainer	A Trainer Emp.ID	Room	Status	Tra ^
b S MEM		4 Lewis Smith	UK_Agent_011	London	Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3	5 Oct 2017 08:00	5 Oct 2017 12:00	Briony Christopher	182579	Training Room 1	Scheduled	
		Liam Coultma			Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3					-	Unsched	
		Lucy McAliste			Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3	11 Oct 2017 08		Briony Christopher		Training Room 1		
		Margaret Tallach	UK_Agent_073		Frank Lampard	London	Blue Sky Airlines	Class Training	Class 3	Class 3	15 Oct 2017 08			182579	Training Room 1		
		Matthew Reid	UK_Agent_019		Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3 Class 3			Briony Christopher	182579	Training Room 1 Training Room 2		
		Matthew McSeve	UK_Agent_028 UK Agent 018		Kelly Smith Paul Scholes	London	Blue Sky Airlines Blue Sky Airlines	Class Training Class Training	Class 3 Class 3	Class 3 Class 3	8 Dec 2017 08:	8 Dec 2017 12	Briony Christopher	182573	Training Hoom 2	Unsched	
		Matthew McSeve			Kely Smith	London	Blue Sky Arlines	Class Training	Class 3	Class 3	4 0++ 2017 08:00	40+201712-00	Briony Christopher	182579	Training Room 1		
		Melanie Gardner		London	Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher		Training Room 1		
_		Mohammad Michtar	LIK Agent 065	London	Frank Lampard	London	Blue Sky Airlines	Class Training	Class 3	Class 3						Unsched	
				London	Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3						Unsched	
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Rejected				London	Kelly Smith Kelly Smith	London	Blue Sky Airlines Blue Sky Airlines	Class Training Class Training	Class 3 Class 3	Class 3 Class 3			Briony Christopher Briony Christopher		Training Room 1 Training Room 1		

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.

Training Manager																-	0
File View Training Tools Help																	
Main Menu	[[]																
Training Manager	Master Schedule	e Soena	nios														0
Training Requests	Statistics for this	e Event															
Completion Status				# Sch	eduled			55									
Reports	40 60		Overall Completion	# Uns	cheduled			19									
Meetings	20 35	80	5.5 %	# Tra	hand			3									
Resource Calendars		100-1	0.0 /0					-									
Soom Calendars	(# Trained / # Si	cheduled) x		# Unt	rained / Partially T	rained		52									
A Trainer Calendars	100																
A Manager Calendars																	
Configuration	Training Session	n Filters															
Training Manager	Enable Dat	te Filter															
Training Kanager	Start Dat	e		End Date													
Meeting Types	27/11/2	017		11/12/2017													
Booking Categories	Enable Sta	tus Elter															
	_		<i></i>														
Selection & Exclusion	Unscher		Ø Refreek														
a Resources	i.e. Not y	et in any Trair	ning Session for the	Event													
Rooms & Locations	Columna																
A III Trainers			🗹 Site 🗹 Busir														
Trainer Skills	⊡ Locason	⊠ Team	⊠ 246 ⊠ Brite	iess Unit													
1 Managers																	
Training Manager Portal	First Name	Last Name	Employee ID	Location	🚰 Team	📮 St	e 📥 Business Unit	Contraining Request	Code	B Event	Start Date	End Date	🚨 Trainer	A Trainer Emp.ID	Room	Status	Tra ^
D 🚺 WEM	4 Lewis	Smith	UK_Agent_011		Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3	5 Oct 2017 08:00	5 Oct 2017 12:00	Briony Christopher	182579	Training Room 1		
	Liam	Coutma	UK_Agent_012		Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3						Unsched	
	Margaret	McAlister Tallach	UK_Agent_034		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3 Class 3			Briony Christopher		Training Room 1		
	Matthew	Reid	UK_Agent_073 UK_Agent_019		Frank Lampard Paul Scholes	London	Blue Sky Airlines Blue Sky Airlines	Class Training Class Training	Class 3 Class 3	Class 3 Class 3			Briony Christopher Briony Christopher		Training Room 1 Training Room 1		
	Matthew	McSeve	UK Agent 028		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher		Training Room 2		
	Matthew	Watts	UK Agent 018		Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3	0 000 2011 00	00002011 12	briding of manopring	102010	Training Troom 2	Unsched	
	Matthew	McSeve	UK_Agent_028	London	Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3	4 Oct 2017 08:00	4 Oct 2017 12:00	Briony Christopher	182579	Training Room 1	Trained	
	Melanie	Gardner	UK_Agent_031		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3	15 Oct 2017 08	15 Oct 2017 12	Briony Christopher	182579	Training Room 1		
	Mohammad	Akhtar	UK_Agent_065		Frank Lampard		Blue Sky Airlines	Class Training	Class 3	Class 3						Unsched	
	Natalie	Simpson	UK_Agent_037		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3						Unsched	
Sub Menu	Noah	McCafferty Beattle	UK_Agent_013 UK_Agent_048		Paul Scholes Kelly Smith	London	Blue Sky Airlines Blue Sky Airlines	Class Training Class Training	Class 3 Class 3	Class 3 Class 3			Briony Christopher Briony Christopher		Training Room 1 Training Room 1		
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Viewing by Training Requests	R Paul	Beattie	UK_Agent_048		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher		Training Room 2		
🐖 4 Sep 2017 - 4 Jan 2018	🧳 Paul	Marshall	UK_Agent_017		Paul Scholes	London	Blue Sky Airlines	Class Training	Clase 3	Class 3	18 Oct 2017 08	18 Oct 2017 12	Briony Christopher	182579	Training Room 1	Scheduled	
Pending Approval	Rick	Rick	UK_Agent_014	London	Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briany Christopher		Training Room 1	Scheduled	
🖌 🕕 Active	Rob	Allan	UK_Agent_070		Frank Lampard		Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher		Training Room 1		
🖌 🍓 Class Training	Rob	Callaghan	UK_Agent_021		Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher		Training Room 1		
G Class 3	Rob	McAloon	UK_Agent_030		Kelly Smth	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briony Christopher		Training Room 1		
B Portal request 1	- Pob Ronnelle	Tuck Broomball	UK_Agent_055 UK_Agent_020		Frank Lampard Paul Scholes	London	Blue Sky Airlines Blue Sky Airlines	Class Training Class Training	Class 3 Class 3	Class 3 Class 3	a Get 2017 08:00	a Oct 2017 12:00	Briony Christopher	1025/9	Training Room 1	Scheduled Unsched	
Completed	Scott .	Gibson	UK_Agent_071		Frank Lampard		Blue Sky Airlnes	Class Training	Class 3	Class 3	5 Oct 2017 08:00	5 Oct 2017 12:00	Briony Christopher	182579	Training Room 1		
B Rejected	Scott	Christie	UK_Agent_042		Kelly Smith	London	Blue Sky Airlines	Class Training	Class 3	Class 3			Briany Christopher		Training Room 1		
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	<																>
																	Court
																	Export

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.

Training Sessi	ion Filters													
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		2012 💌	End Date	23 Aug 2012 💌										
Enable S	itatus Filter													
		💌 🧬 F	lefresh											
Columns														
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irst Name	Laublana	[ID	l an the star	📁 Management Unit	Training Descent	🦉 Cata	(a) Front	Charle Date	End Date	C Tariana	A Trainer Emp.ID	Al Dece	Status	Trainer
Gregory	Parsons	5002	Manchester		Test Training Request		Event 1	5 Mar 2010 12:00	5 Mar 2010 13:00			Manchester Room 2		Trainer
1														

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**.

🛃 Training Manager																				 - 0
File View Training Tools Help																				
Main Menu	Master Sche		e	1																
🖌 👩 Training Manager																				
a C Training Requests	Training Rev	quest Filten	6																	
Completion Status	Enable	Status Filte	N .																	
Reports Meetings	Enable	Code Dite																		
Meetings Resource Calendars		Code File																		
Room Calendars	Training Ser	enico Eiterre																		
Trainer Calendars	-	Date Filter																		
S Manager Calendars	Stat				End Date															
Gonfiguration		1/2017			11/12/201	7														
a 📑 Training Manager	Enable	Status Filte	ar .																	
Training Categories Meeting Types		cheduled		@ Refres	h															
Booking Categories				ession for the																
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↓ Trainers	First Na	Last Ma	E de la		89. T					0.5	0	Ded Date		• •	al n	0.1.1	Technol	Uhore Co.	E at al a	
Managers	Pine Na	Last Na	Employ	101 L		M Ste	- B.	69 IC.	🤏 U	US E.	Start Date	End Late	🍊 Ir	- Ir	90 H	Status	trainer	User Co	EXClusio	
Training Manager Portal																				
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Sub Menu																				
Viewing by Training Requests																				
4 Sep 2017 - 4 Jan 2018																				
Pending Approval																				
Active																				
O Completed																				
Rejected																				
																				 🛃 Export

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.

😸 Training Manager										
File View Training Tools Help										
Main Menu	Master Schedu	e Scenarios								
🖌 😴 Training Manager										
Training Requests	Training Requ	est Filters								
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Reports										
Meetings	Enable Co	de Filter								
A Resource Calendars										
Room Calendars	- Training Sessio	n Filters								
Trainer Calendars										
Anager Calendars	Enable Da									
Configuration	Start Da			Date						
Reg Training Manager	27/11/2	2017	<u></u> , ⊤ 11/	12/2017						
Training Categories	Enable St	atus Filter								
Meeting Types	Unsche	duled .	Refresh							
Booking Categories	ie Not	vet in any Training	Session for the Eve	nt.						
A Selection & Exclusion										
Resources	Columns									
Rooms & Locations	✓ Location	🗹 Team 🗹	Site 🗹 Business	Unit						
Trainers										
Trainer Skills	First Name	Last Name	Employee ID	Location	📸 Team	Ste	🙈 Business Unit	Itaining Request	🥵 C	Event
Managers	Abida	Mushtag	UK Agent 072	London	Frank Lampard	London	Blue Sky Airlines	new regulations	new req	new reg
R Training Manager Portal	Abida	Mushtaq	UK_Agent_072	London	Frank Lampard	London	Blue Sky Airlines	New product	sk1234	sky demo
▶ 🛃 WEM	Adam	Connor	UK_Agent_006	London	Paul Scholes	London	Blue Sky Airlines	New product	sk1234	sky demo
	Adam	Connor	UK_Agent_006	London	Paul Scholes	London	Blue Sky Airlines	new regulations	new reg	new reg
	Adam	Cuthbertson	UK_Agent_059	London	Frank Lampard	London	Blue Sky Airlines	New product	sk1234	sky demo
	Adam	Cuthbertson	UK_Agent_059	London		London	Blue Sky Airlines	new regulations	new reg	new reg
	Akemkar Akemkar	Paul	UK_Agent_056	London	Frank Lampard Frank Lampard	London	Blue Sky Airlines	New product Class Training	sk 1234 Class 3	sky demo
	Akemkar	Paul	UK_Agent_056 UK_Agent_056	London	Frank Lampard	London	Blue Sky Airlines Blue Sky Airlines	new regulations	new reg	Class 3 new reg
	Alexander	Lightbody	UK_Agent_064	London	Frank Lampard	London	Blue Sky Airlines	new regulations	new reg	new reg
	Alexander	Lightbody	UK Agent 064	London	Frank Lampard	London	Blue Sky Airlines	New product	sk1234	sky demo
	Amanda	Amanda	UK_Agent_001	London	Paul Scholes	London	Blue Sky Airlines	Class Training	Class 3	Class 3
	Amanda	Welsh	UK_Agent_023	London	Paul Scholes	London	Blue Sky Airlines	new regulations	new reg	new reg
Sub Menu	Amanda	Amanda	UK_Agent_001	London	Paul Scholes	London	Blue Sky Airlines	New product	sk 1234	sky demo
	Amanda	Welsh	UK_Agent_023	London	Paul Scholes	London	Blue Sky Airlines	New product	sk1234	sky demo
a 🌍 Completion Status	Amanda	Amanda	UK_Agent_001	London	Paul Scholes	London	Blue Sky Airlines	new regulations	new reg	new reg
Viewing by Training Requests	Amy Amy	Thorpe Thorpe	UK_Agent_002 UK_Agent_002	London	Paul Scholes Paul Scholes	London London	Blue Sky Airlines Blue Sky Airlines	New product new regulations	sk 1234 new reg	sky demo new reg
🔊 4 Sep 2017 - 4 Jan 2018	Andrew	Smith	UK_Agent_032		Kelly Smith	London	Blue Sky Airlines	New product	sk1234	sky demo
Pending Approval	Androw	MaGamal	LIK Accent 002	London	Paul Coholoo	London	Diue Sky Airlines	Now product	al-1004	alay domo

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.

👩 Training Manager			– 🗆 X
File View Training Tools Help			1
Main Menu	Report	Select the required report.	
⊿ 🛃 Training Manager			
Training Requests			
Completion Status	Training Session Filter		-
E Reports	Start Date End Date		
Meetings	27/11/2017	🕼 Refresh	
a 📲 Resource Calendars			
🛃 Room Calendars			
Strainer Calendars			
& Manager Calendars			
Configuration	_		
Training Manager Training Categories			
Meeting Types			
Booking Categories			
Selection & Exclusion			
A TRESOURCES			
Rooms & Locations			
Trainers			
Trainer Skills			
Managers			
g Training Manager Portal			
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Sub Menu			
Reports			
		Click Export to s	save the
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		report to a file.	
		report to a me.	
🙀 Preferences 🗸			Export
Ready		😴 WFM 👻 😴 Performance DNA 👻 Monday, 04 Decemb	per 2017 16:05 Time Zone 🧃 🕂

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.