GENESYS™

Skills Management 9.0.0

Training Manager Web Portal

Trainer Manager Guide

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Contents

Table of Figures

1 The Trainer Manager

When the trainer manager logs on to the system, he or she is presented with a home page view similar to the following example.

The trainer manager has access to:

- trainer calendar
- view other trainer's calendars
- room calendar
- set your regular working hours
- change your time zone
- training roadmap

Depending on how Portal is accessed a login may be required.

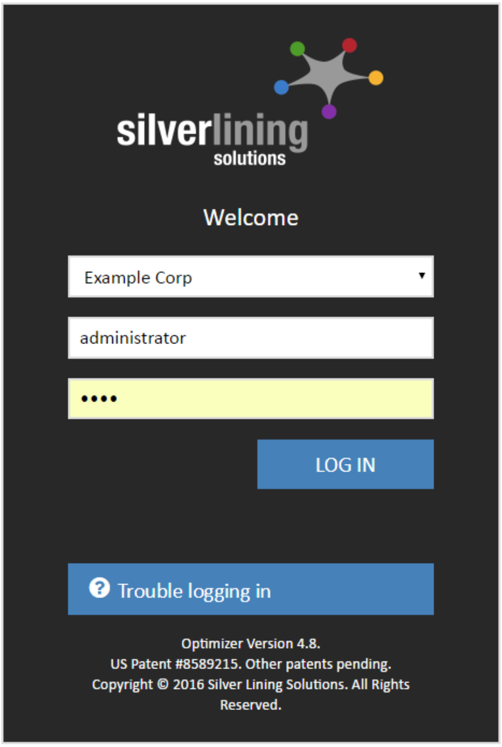


Figure 1: Portal Login Page

When logging in for the first time, a time zone must be selected from the drop down box. This will ensure that any scheduled training activity is recorded in the correct working time zone. If the wrong time zone has been selected, or the configuration is incorrect in Training Manager, then training sessions will show incorrect times. Select **Continue** to either access the Home page or login.

Note: The option to change the time zone in the future is available on the home page under settings.

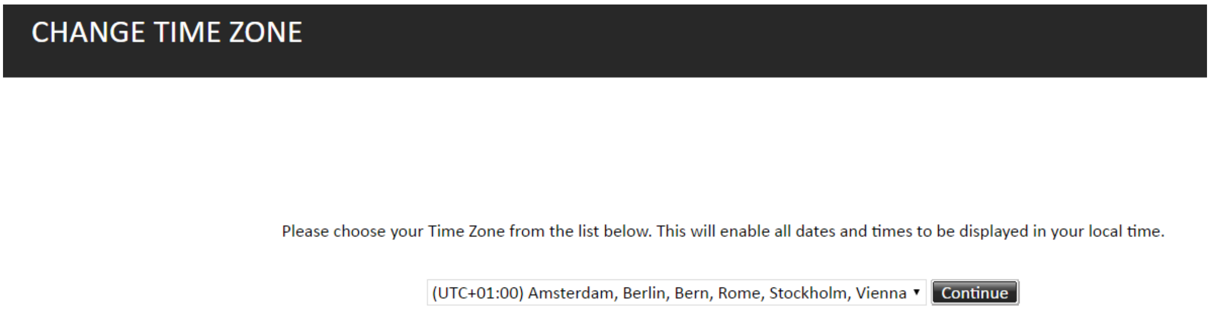


Figure 2: Choose your time zone

2 Trainer Calendar

Clicking **trainer calendar** will present the trainer calendar view, and by default, the **Standard View** tab is displayed.

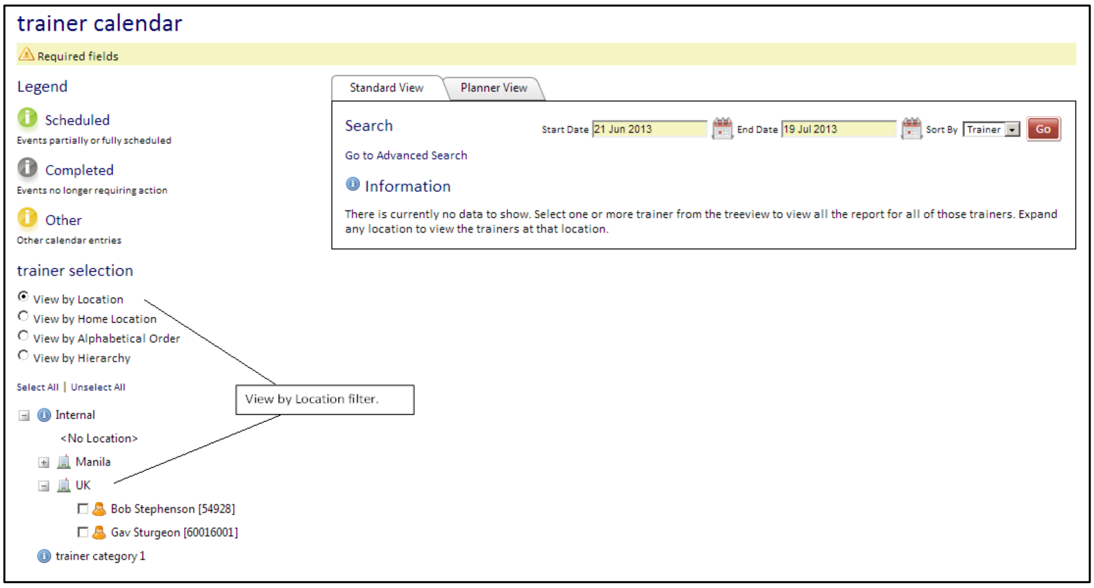


Figure 3: Trainer calendar: standard view

There are four options available for the trainer manager to view the trainers who report to him or her, and the scheduled training activity of those trainers:

- View by Location
- View by Home Location
- View by Alphabetical Order
- View by Hierarchy

View by Location presents the locations in the bottom-left corner of the screen. Expand the location to view the associated trainers.

Select a trainer to view his or her calendar, modify the date range as required, and then click **Go**.

This will list all of the scheduled activities for the selected trainer within the date range.

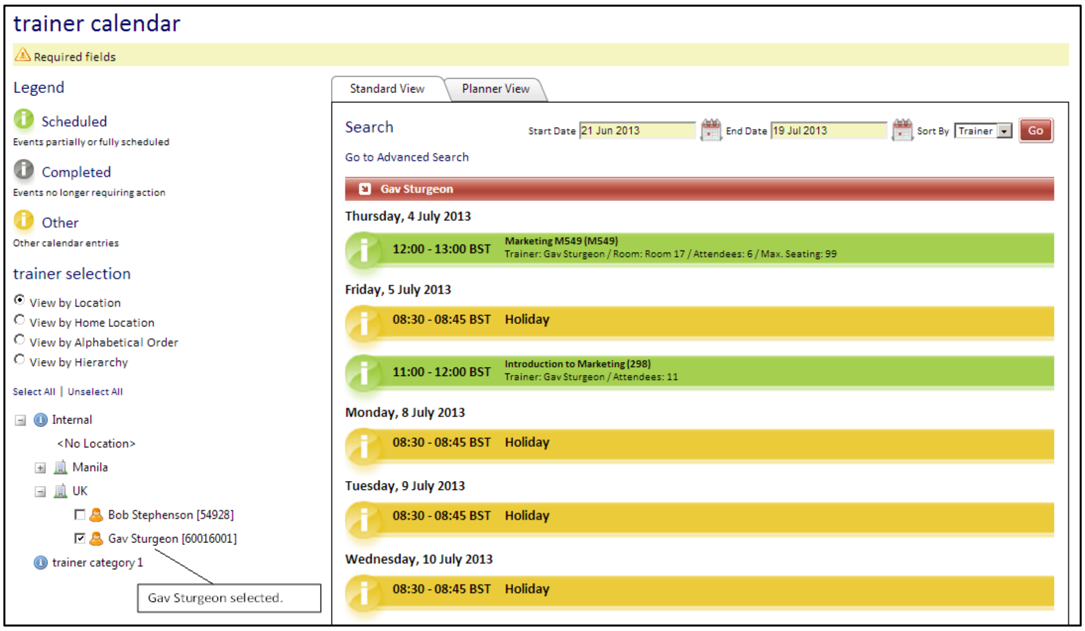


Figure 4: View trainers by location

The status of the training activity is color-coded, as explained in the key on the left side of the screen:

- Scheduled – The training is partially or fully scheduled, and the agents will have this training scheduled in the WFM.
- Completed – The training has been completed, and this activity is listed for information only.
- Other – This is for an activity other than training that the trainers have scheduled—for example, a holiday or meeting.

View by Hierarchy presents the trainer manager with the option to view any trainers who report to him or her.

Expanding the hierarchy and selecting the required trainer together with the relevant date range will reveal any scheduled training activity. The trainer manager can also view his or her own activity by selecting himself or herself and the relevant date range.

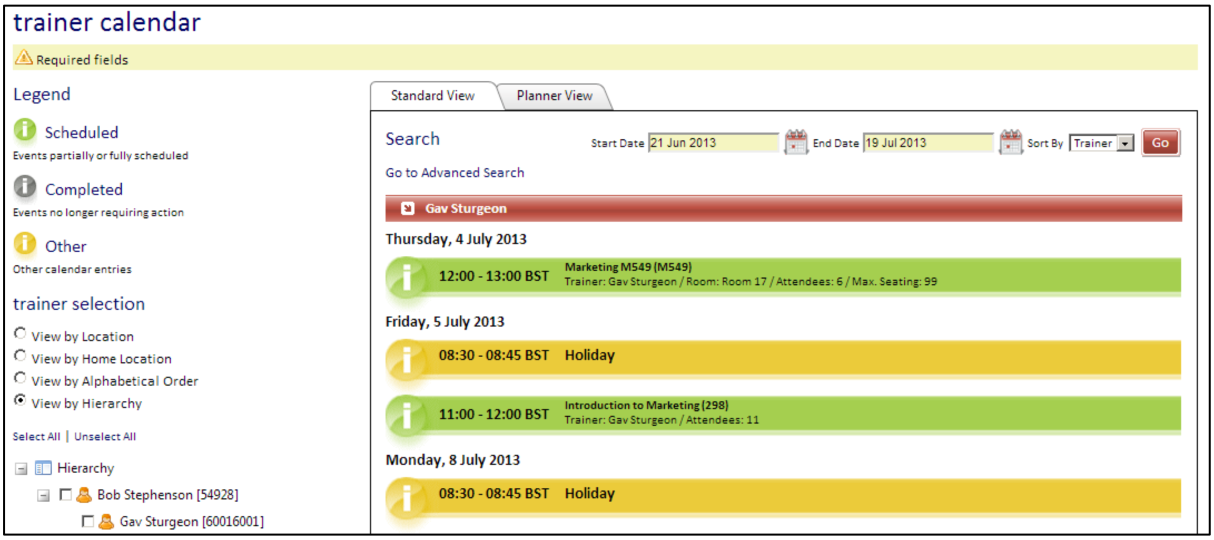


Figure 5: View trainers by hierarchy

To view the training information, click the **training session bar**. This will expand to reveal the allocated room, together with the list of attendees and any information associated with the session—for example, whether all of the attendees completed the training.

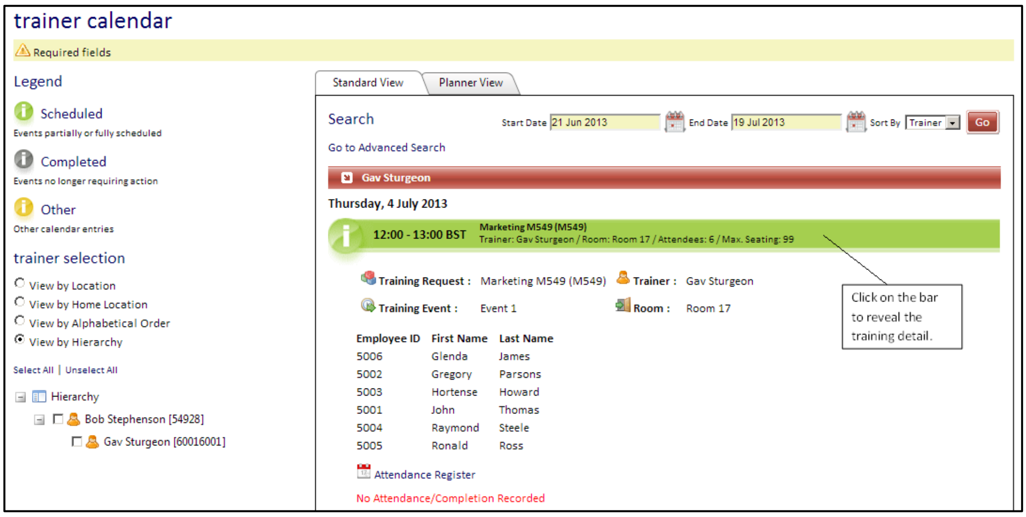


Figure 6: Training session bar and details

3 Calendar Report View

There is also the option to view any trainer activity in a calendar format by clicking the **Training Manager View** tab, as shown in the following example.

The details can be viewed by day, week, or month by selecting the relevant option.

The Training Manager view gives the trainer manager a high-level view of his or her trainers' training activity, and the activities are color-coded for easy visibility.

In this example, one trainer has been selected.

Hovering over any scheduled training activity will reveal some information about the training.

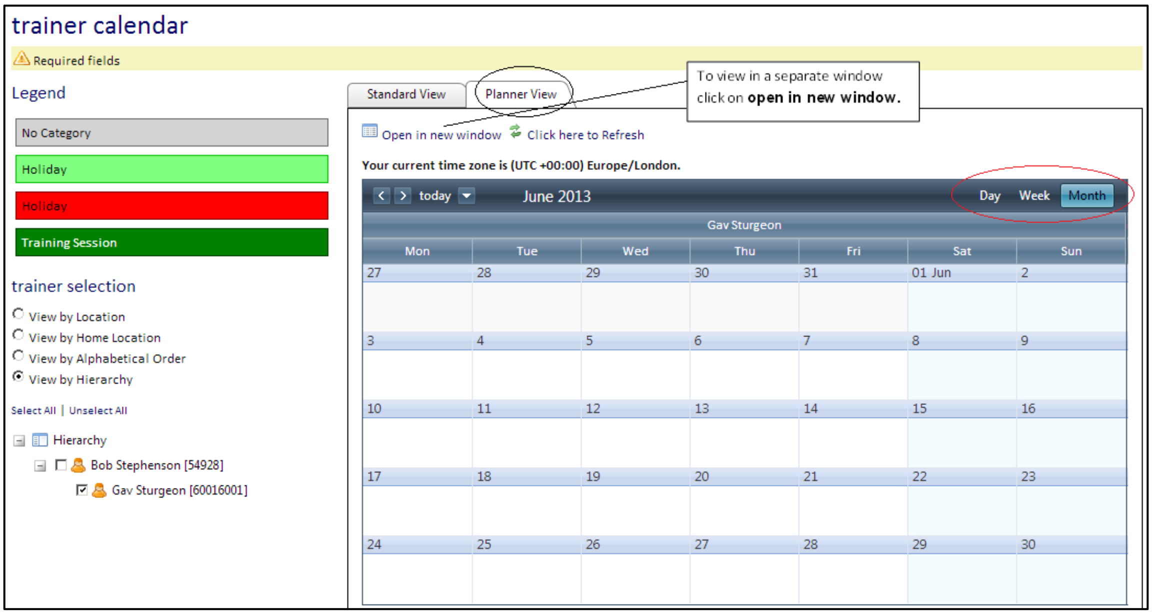


Figure 7: Creating a new calendar entry

To close the separate window click the '**click here to close this pop out window'** link.

The trainer manager has access to insert non-availability time into trainers reporting into them.

To insert non-availability time into a trainer's calendar, right-click in the calendar, and then select **New…** entry.

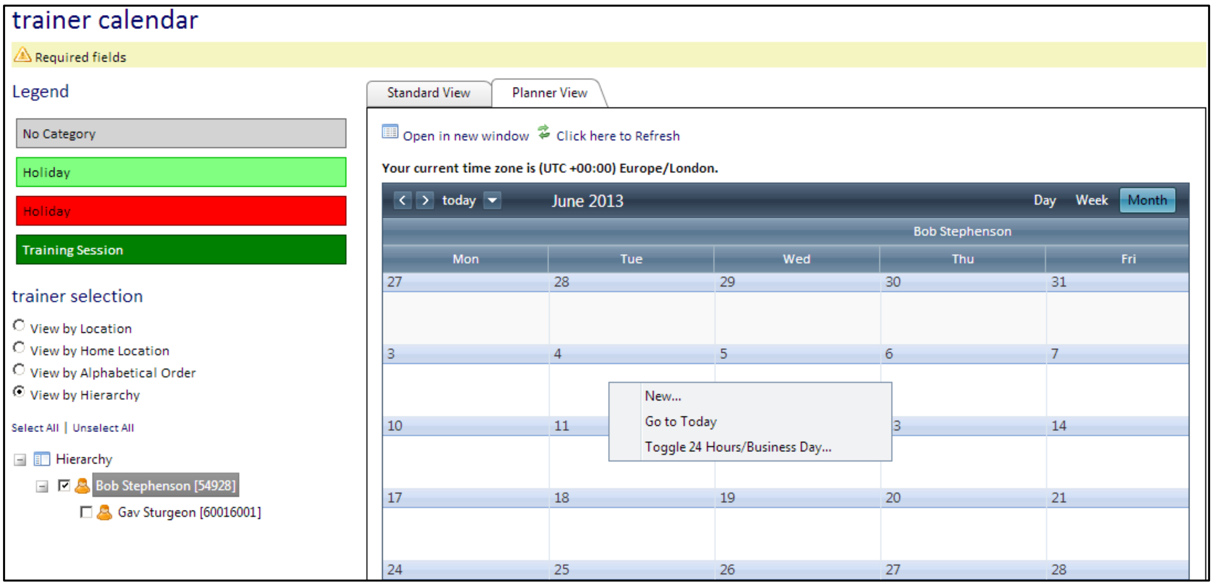


Figure 8: Creating a new calendar entry

The option is then available to select the required category from the drop-down list, and to specify the date and any details. If the event is for more than one consecutive day, the **Recurrence** option has to be used. This creates individual entries for each day in the **Standard View** tab.

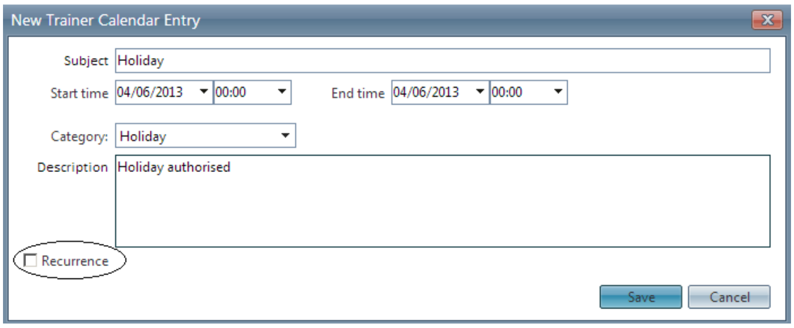


Figure 9: New trainer calendar entry form

Select the relevant recurrence (for example, **Daily**) and an **End by** date, and then click **Save**.

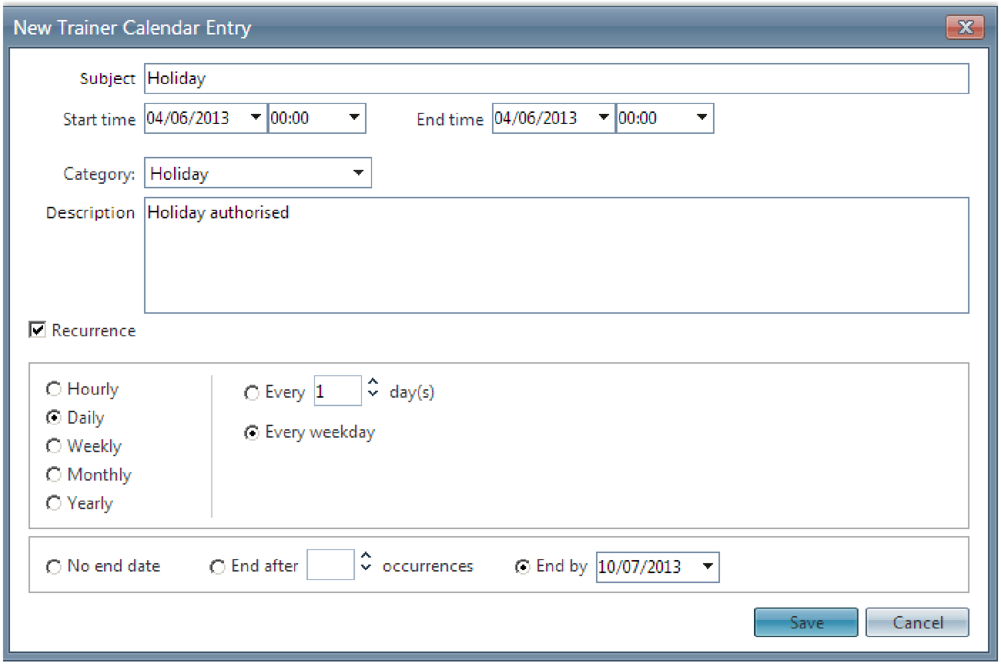


Figure 10: New trainer calendar form – Recurrence options

The scheduled activity will then be displayed on the **Standard View** tab as multiple day entries and in the Training Manager view.

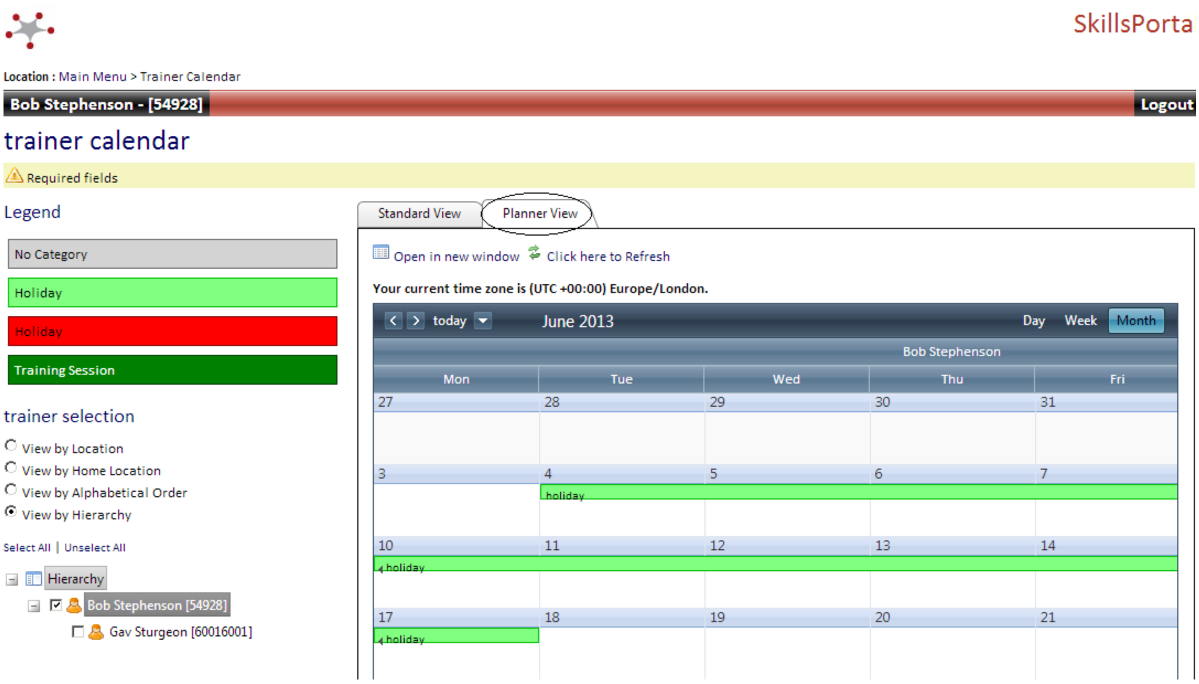


Figure 11: Display of new trainer activities – Training Manager view

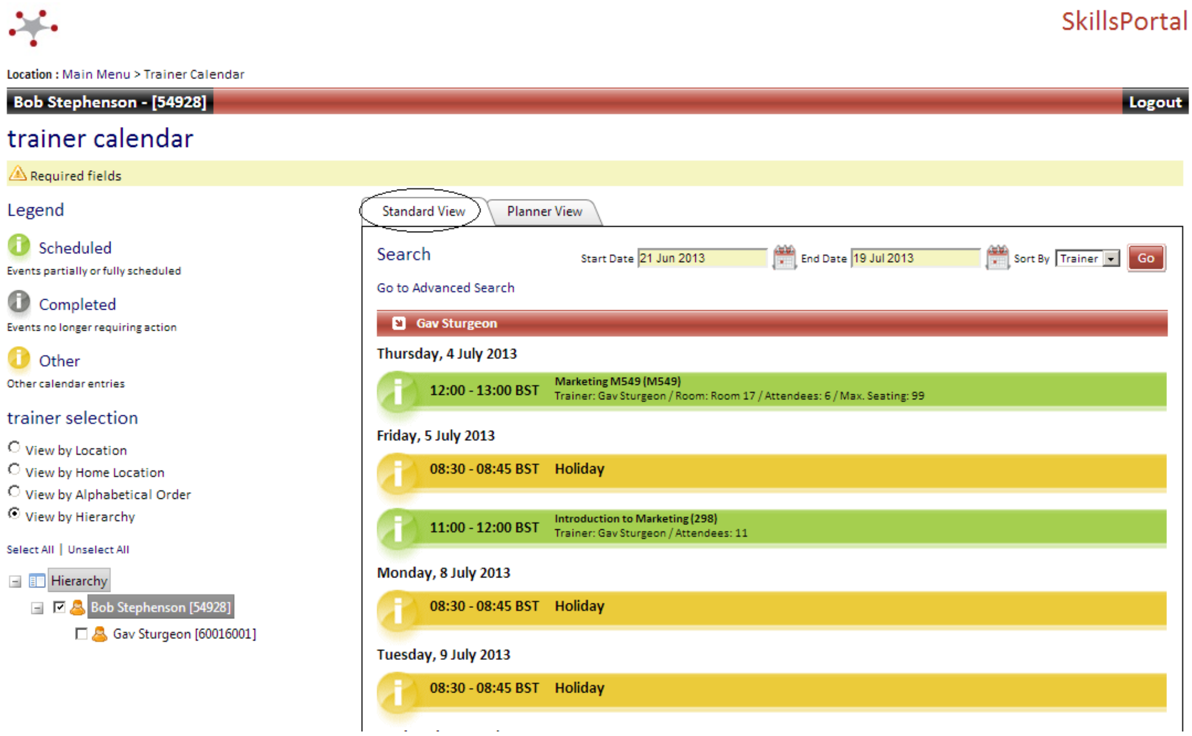


Figure 12: Display of new trainer activities – Standard view

It is also possible to sort trainer calendars by home location and alphabetical order by selecting the relevant checkboxes in the **trainer selection** section.

4 Advanced Search Option

There is a **Go to Advanced Search** option available on the **Standard View** tab.

Click **Go to Advanced Search** and select **Advanced Search**, and a table appears in the bottom-left corner of the screen.

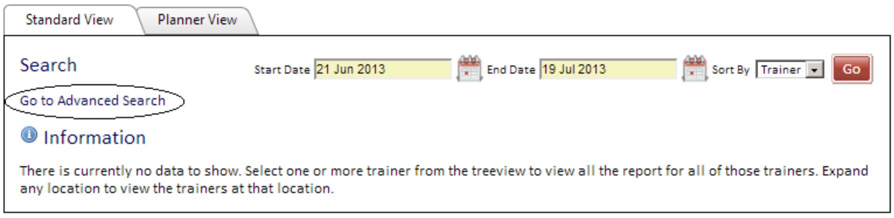


Figure 13: Advanced Search link

There are different options available to search for a trainer who matches the required criteria.

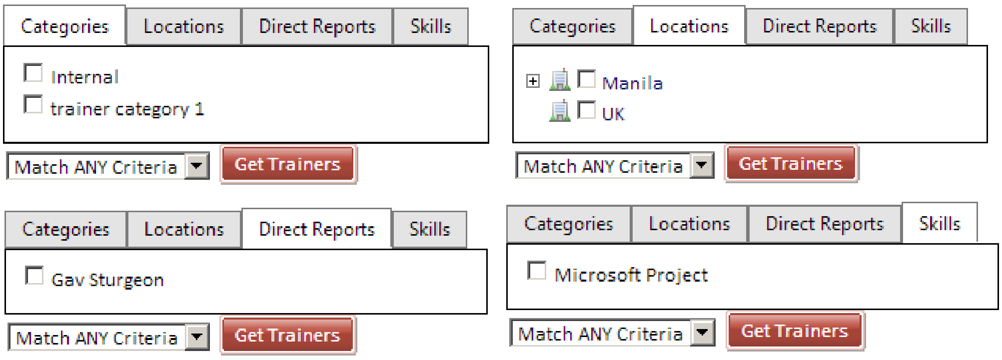


Figure 14: Trainer search options

Select the relevant criteria to search against, and then the **Match ANY criteria** and **Match ALL criteria** options are available for selection in the drop-down list. Select an option, and then click **Get Trainers**.

Any trainers who match the criteria will then be presented.

Select the required trainer and date filter to view the trainer's calendar.

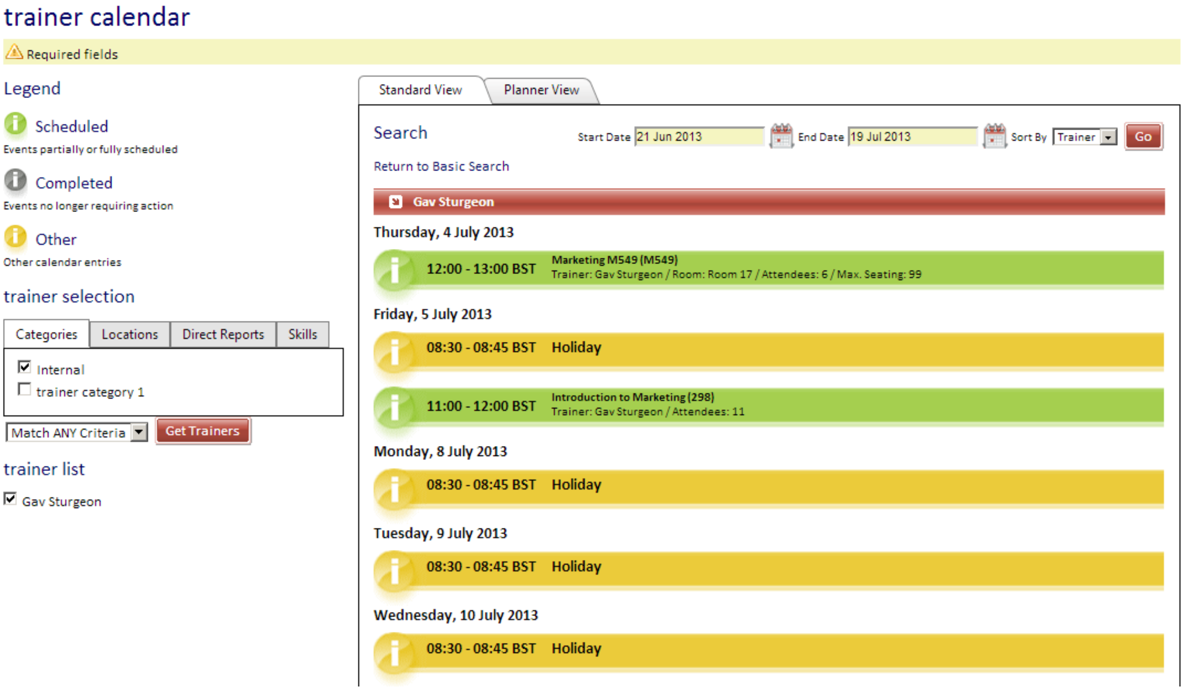


Figure 15: Viewing trainer calendars

5 Room Calendar

To view the room calendar, click room calendar from the menu.

A list of locations is then displayed in the bottom-left corner of the screen, and there will be the option to expand the tree view if there are any rooms associated.

Expand the location to reveal any associated rooms.

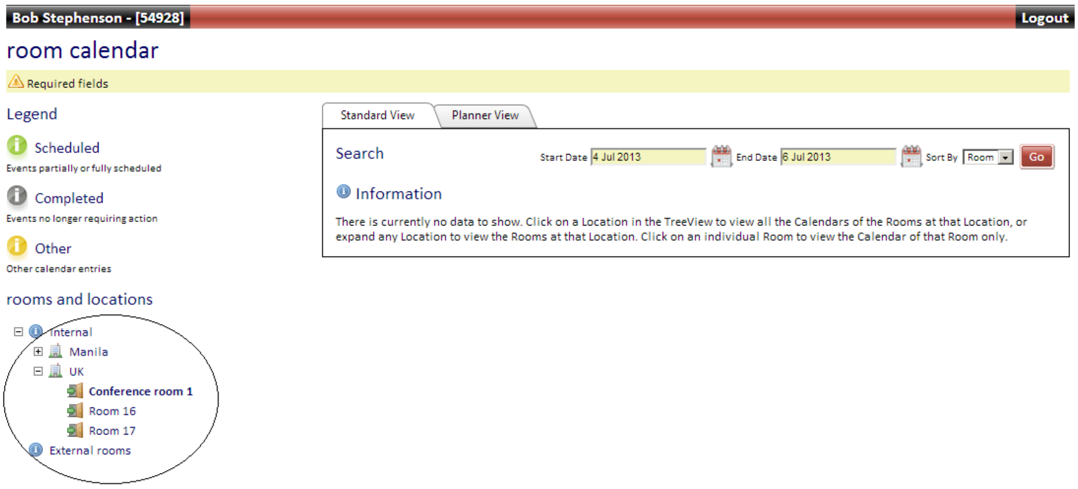


Figure 16: Locations tree

Select either a location or a room to view its activity. In the example below Room 17 has been selected.

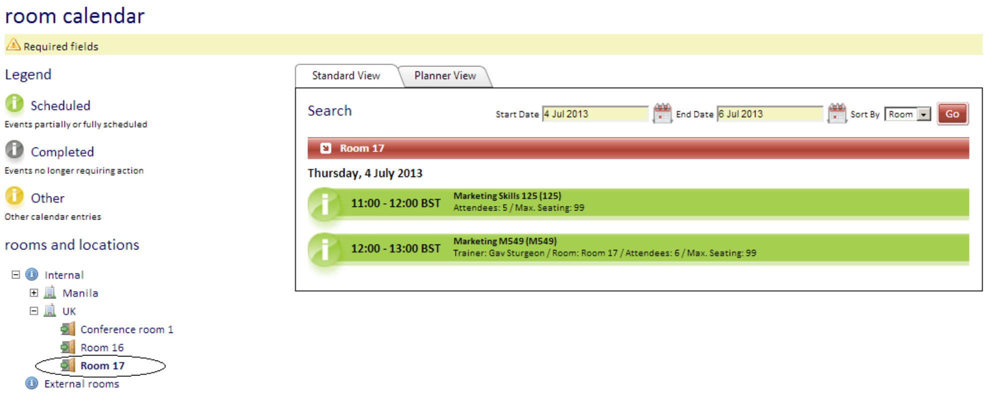


Figure 17: Viewing booked room activities

Click one of the training session bars to reveal the training details, including the trainer and the scheduled attendees.

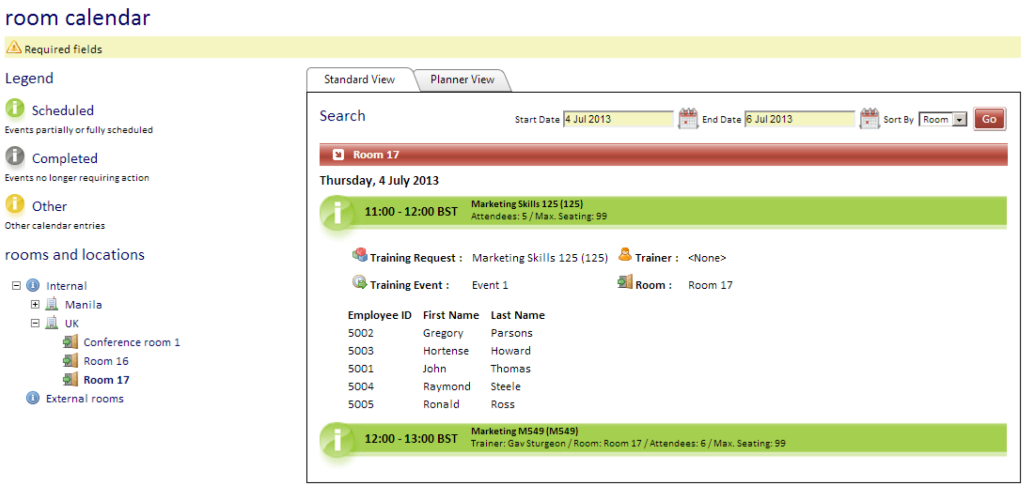


Figure 18: Activity detail

If a room has been mapped to an Exchange room, any appointments entered directly into the Exchange calendar for that room will also be shown in the list as “Other” items, and on the Training Manager view as “No Category” items.

6 View Other Trainers' Calendars

Trainers have the ability to view another trainer's Calendar by selecting **view other trainers Calendars** from the main menu.

The trainer calendar view appears. A list of available trainers will appear at the left hand side.

Select the required trainer and then click on **Go** to view their activity. There is also the option to view the activity in the Training Manager view.

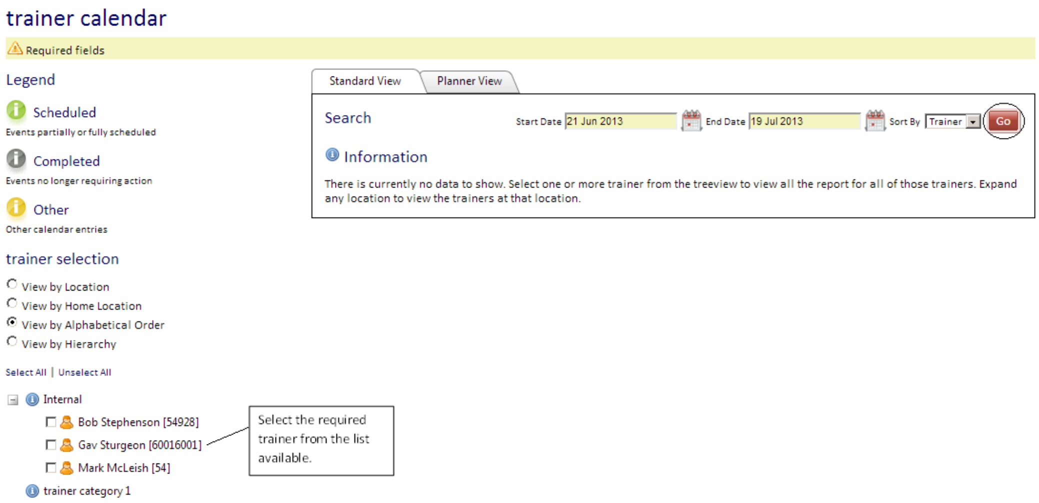


Figure 19: Viewing trainer calendars by home location

Click on the **training session** bar to view the training detail.

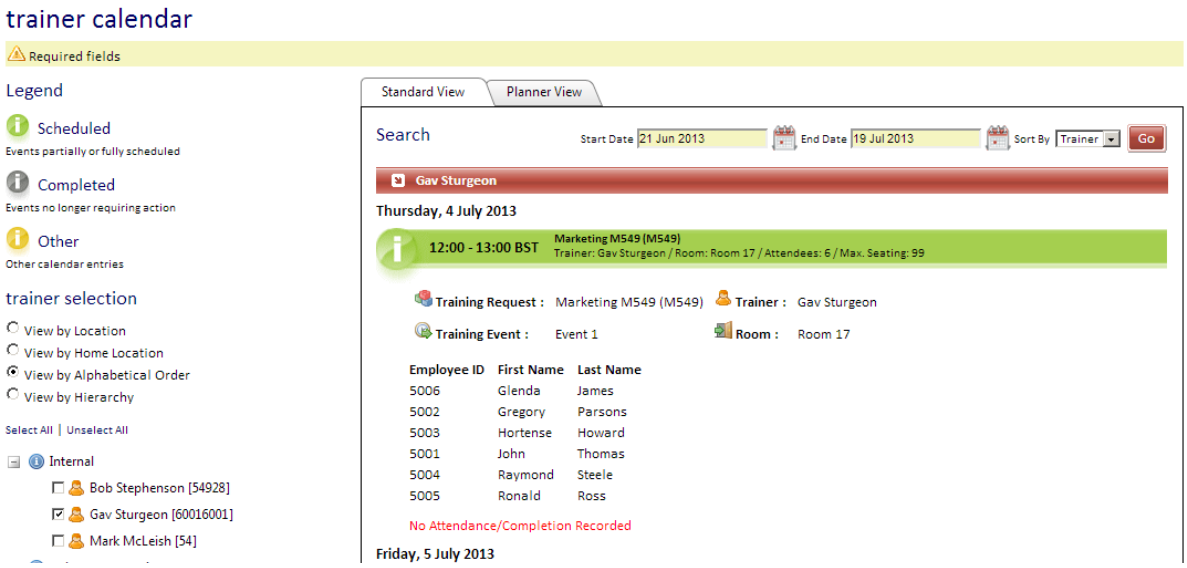


Figure 20: Viewing training session detail

7 Set Your Regular Working Hours

The working hours of trainers are kept up to date in Training Manager by clicking **set your regular working hours** on the home page. This may not be necessary for the trainer manager if he or she will not be scheduled to deliver any training.

The current default hours that Training Manager will use for scheduling will then be presented. If any changes have to be made, use the drop-down lists to select the correct times for the appropriate day. This procedure should not be used to exclude dates and times because of holidays, because these are entered by using the instructions in the ‘Trainer Calendar’ section. The hours entered are then immediately updated in Training Manager and are visible for the trainer.

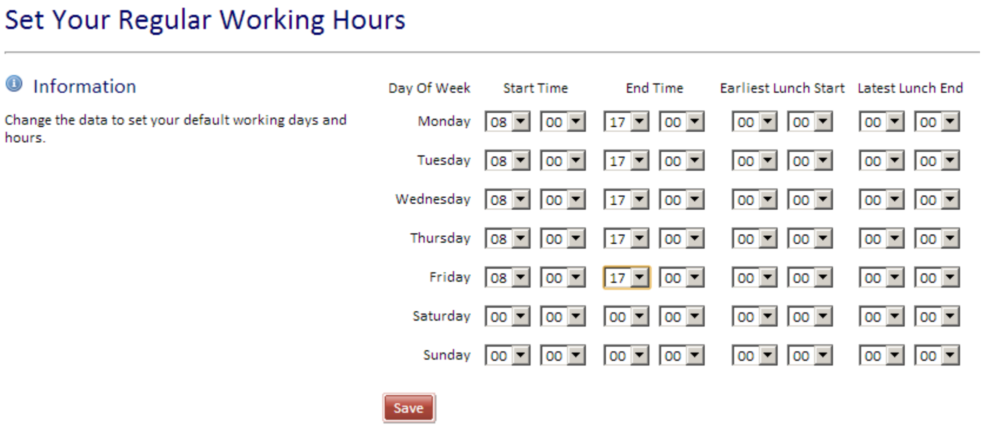


Figure 21: Setting regular working hours

8 Request Booking in Portal

8.1 Request Booking

Portal allows managers and trainers to request a training course or meeting for a group of users. This feature allows users to create a booking request for a specific date range and provide a list of users who should be scheduled for the booking. The completed booking request will then appear within the Training Manager client application which can then be used to search for and publish meeting or training sessions. This feature is available from my **Booking Requests -> Request Booking**.

Clicking on this menu option will open the **request booking** form.

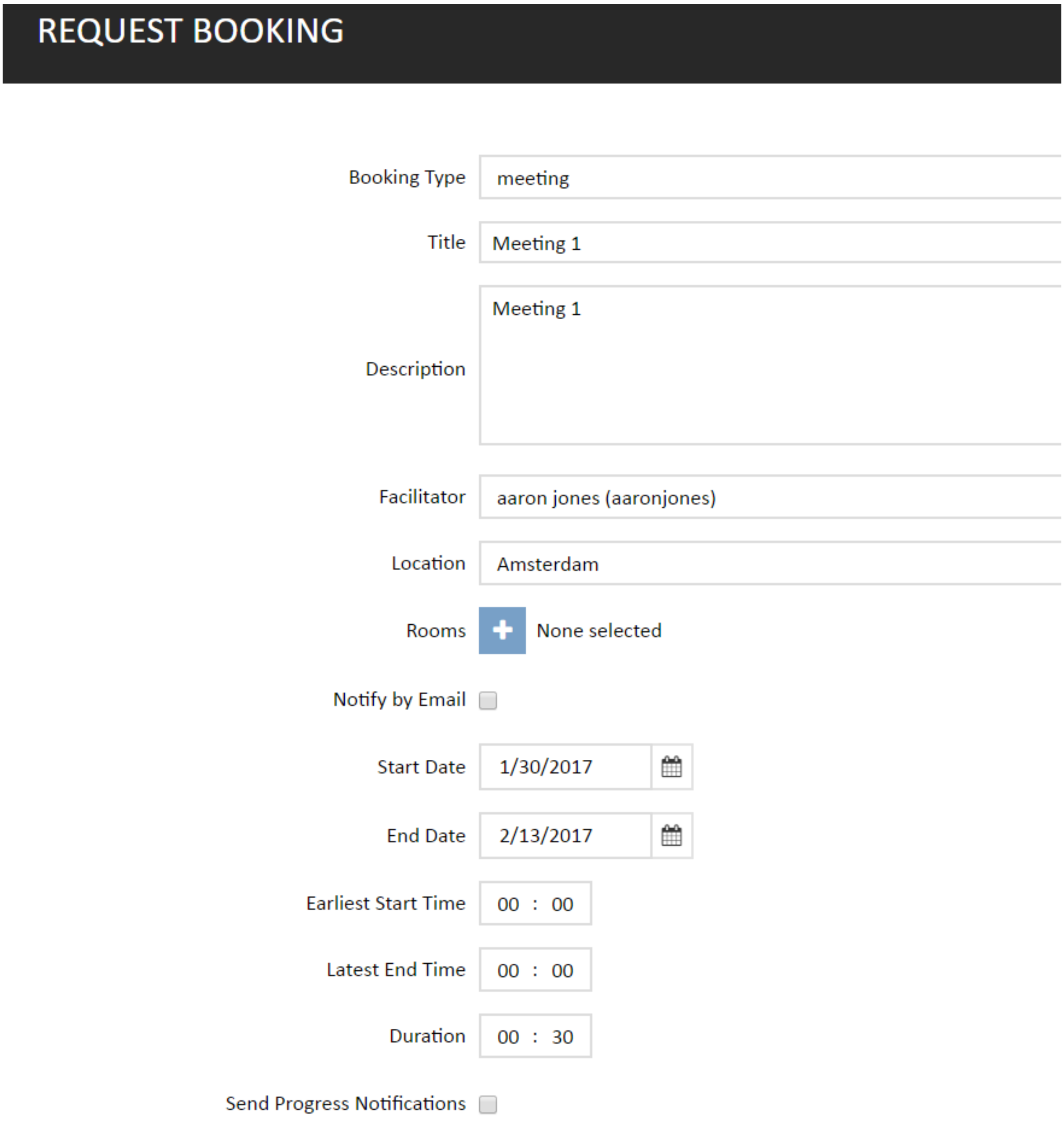


Figure 22 Request Booking Form

All form fields highlighted red are mandatory fields. Selecting a booking type may provide more mandatory fields or different options depending on the booking type being used. Once a location has been specified, it is possible to select rooms from that location to be used for the booking (this is optional). The **Display on Training Roadmap** checkbox controls whether the request will be visible on the Training Roadmap screen (this will also depend on whether pending training requests are set to be displayed within Portal). The **Start Date** and **End Date** controls are used to define the date range within which the booking should be scheduled.

The minimum and maximum number of attendees options can be used to restrict the session search to just those sessions that meet the minimum and maximum number of users criteria.

The Send Progress Notifications option allows for the sending of notification emails (to the email addresses specified in the Notification Recipients field) when the status of the booking request changes, e.g. the session search completes and all sessions are published.

The bottom part of the screen allows the user to define the users who should be included in the booking request. There are two view options for selecting users for a booking: **View Hierarchy** and **Search For Users**. The **View Hierarchy** option displays a hierarchy of your organisation and allows you to select either individual users or groups by ticking the appropriate checkboxes.

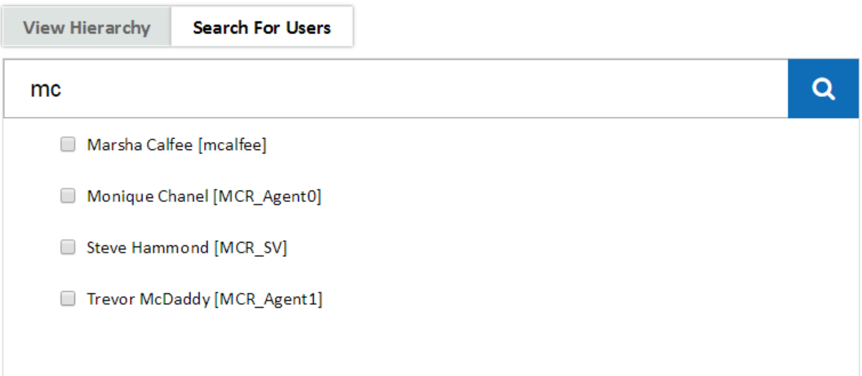


Figure 23: Selecting users from the WFM hierarchy

Once you've made a selection, Click the **>** button to add the users to the Selected Users box on the right side of the page. If you wish to remove users from the Selected users box, tick their checkboxes in the selected users box and click the **<** button. It is possible to add whole groups to the selected users box in this view, rather than adding many users individually.

The **Search For Users** tab allows you to search for users in your organisation and add them to the selected users box. The search box requires two characters or more and will list results in alphabetical order by last name, then by first name. The search feature looks for the search value in users' first names, last names and employee Ids. If only a single word is specified, the results will include any user where the word occurs in either first name, last name or employee Id. If more than one search term is specified, the results will include only the users where all of the search terms are present in the first name, last name and/or employee Id. The search feature is not case sensitive.

Figure 24: Searching for users

As with the **View Hierarchy** mode, users can be added to the training request by ticking their checkboxes in the search results and clicking the **>** button. Likewise, users can be removed from the training request in this mode by ticking the checkboxes in the selected users box and clicking the **<** button.

There are no restrictions to the use of these two modes; some users/groups can be added via the **View Hierarchy** option and other users can be added via the **Search For Users** tab.

Click the **Submit** or **Schedule** button in the bottom-right corner of the page to submit your training request, once you are happy with the specified form entries and user selection. When selecting **Schedule**, your request will be added to a queue and will be processed automatically. Submitted requests or requests that can't be scheduled will be set to the status *Requested* so that a Resource Planner can review your request. Once the training request has been saved, you'll see a 'Your request has been submitted.' message and have the option to either return to the Portal home page or submit a new training request. The new booking request will then be available to Training Manager users under the Training Requests/ Pending menu or Meeting under meeting Requests. They will then be able to edit all the submitted information (including the user selection), then search for and publish training/meeting sessions. Published sessions will then appear in the attendees' Portal calendars as normal.

Note:

- It is possible to add groups to the booking request in the **View Hierarchy** option. This will result in the groups being listed in the selected users box. Opening the groups in the selected box via the hierarchy view allows the removal of individual users from the selection. This will result in the remaining members of that group being listed individually rather than as part of the group.
- When booking a training request, if a facilitator is selected and Trainer Endpoints have been configured in Performance DNA then the trainers' schedules/diaries will be checked in all systems configured.

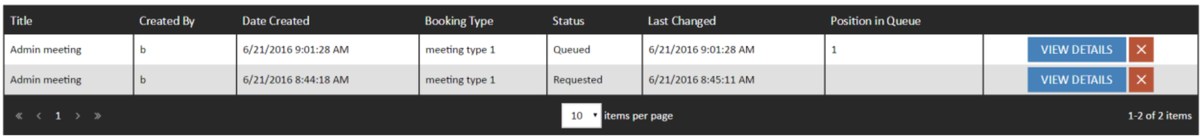
8.2 Viewing Booking Requests

Once users have requested a booking, they or an administrator can view those requests. To view the booking requests through Portal, click the view booking requests link. This page shows the booking requests that have been made either through Portal or Training Manager. The top of the page includes search and filter functions (searching by title, date range, booking type and status). The bar underneath the filters shows how many requests that are visible to the user are in each state (pending approval, active, rejected, requested or queued). Administrators are able to see all booking requests, whilst trainers and managers will only see the requests that they have made.

The main table in the page shows a list of booking requests, including the following details:

- Title
- Created By
- Date Created
- Booking Type
- Status
- Last Changed
- Position in Queue (if processing)

The table has standard paging controls in the bottom-left corner, an option to set the number of items visible per page and a display of the total number of items (and how many are shown on the current page) in the bottom right corner.



Title	Created By	Date Created	Booking Type	Status	Last Changed	Position in Queue	
Admin meeting	b	6/21/2016 9:01:28 AM	meeting type 1	Queued	6/21/2016 9:01:28 AM	1	VIEW DETAILS
Admin meeting	b	6/21/2016 8:44:18 AM	meeting type 1	Requested	6/21/2016 8:45:11 AM		VIEW DETAILS

« ‹ 1 › » 10 items per page 1-2 of 2 items

Figure 25: View Booking Requests

8.3 Cancelling Booking Requests

The 'X' icon on the right side of the View Details button can be used to cancel booking requests. Clicking the X icon will un-publish any sessions that were published for the request and set the status of the request to 'cancelled'. Cancelled booking requests do not appear in the Training Manager client.

The ability to cancel booking requests can be enabled/disabled in the Portal System Settings page by ticking/unticking the 'Allow cancellation of Booking Requests' option and clicking the Save button.

Administrators are able to cancel any booking request. Trainers and managers can only cancel the requests that they have created.

Further details (e.g. location, start date, end date, duration, notify by email and list of sessions) can be found by clicking the View Details button for the appropriate booking request. Click the View all booking sessions button to return to the main view booking requests page.

Request Name	Team Meeting 3	Status	Rejected
Booking Type	regular meeting	Description	Team 3 regular meeting
Requested By	GenesysWFM\demo	Manager	Roger Smith (2098347308467)
Location	london	Notify By Email	No
Start Date	4/11/2016	End Date	5/11/2016
Duration	01:00		

Sessions

VIEW ALL BOOKING REQUESTS

Figure 26: View Booking Details

9 Training Roadmap

Click **Training Roadmap** from the main menu.

The training status is colour-coded, as explained in the legend on the left side of the screen.

The training sessions can also be filtered by using the **Sort By** drop-down list.

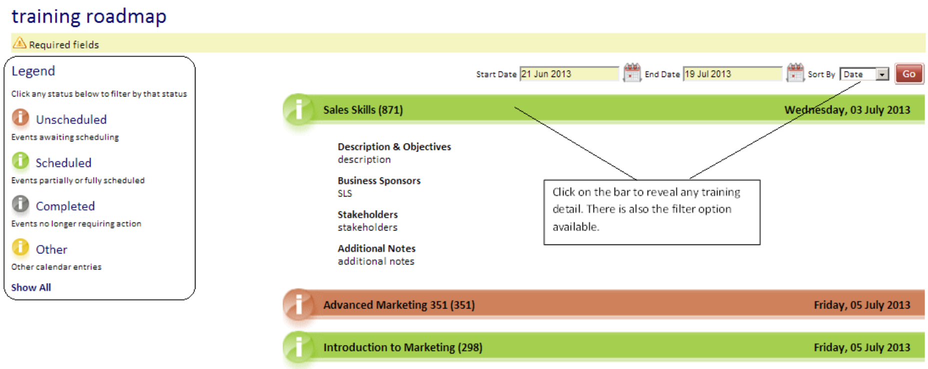


Figure 27: Training session legend and filters

10 Creating Training Requests

Portal allows managers and trainers to request a training course for a group of users. This feature allows users to create a training request for a specific date range and, optionally, provide a list of users who should be scheduled for training. The completed training request will then appear within the Training Manager client application which can then be used to search for and publish training sessions. This feature is available from my **options -> requests -> request training**.

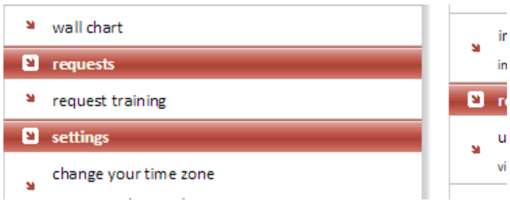


Figure 28: Request Training Link

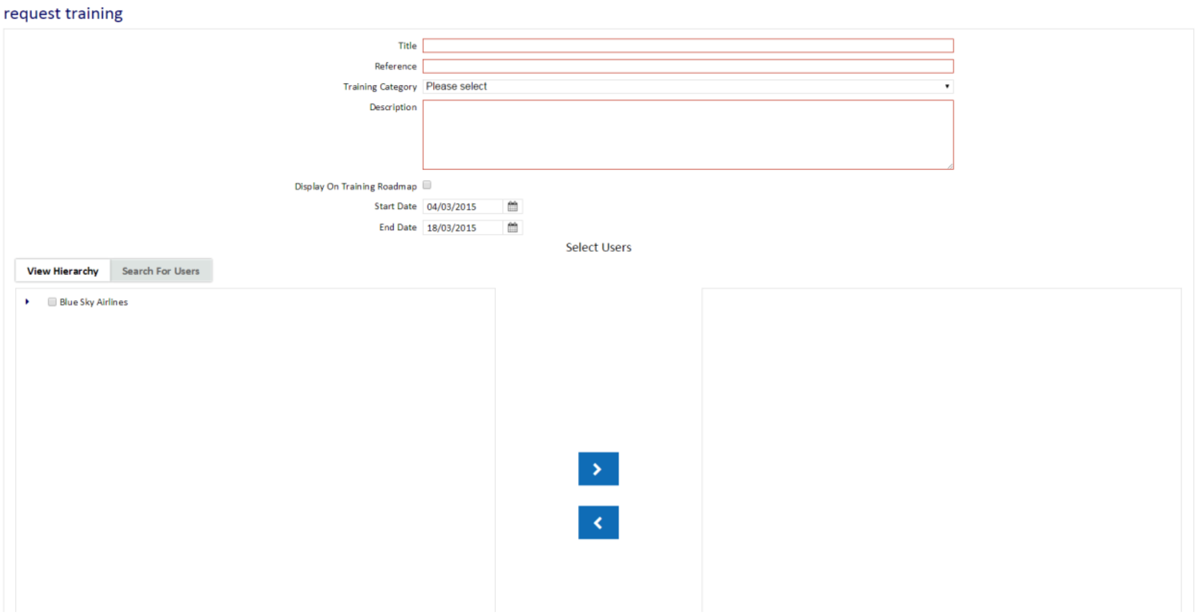


Figure 29: Request Training Form

Clicking on this menu option will open the **request training** form.

The fields at the top of the form are mandatory except the **Training Category**. The **Title**, **Reference** and **Description** fields can be used to provide information to the scheduler about the training request. The **Training Category** can be used to select the type of training required. The **Display on Training Roadmap** checkbox controls whether the request will be visible on the Training Roadmap screen (this will also depend on whether pending training requests are set to be displayed within Portal). The **Start Date** and **End Date** controls are used to define the date range within which the training should be scheduled.

The bottom part of the screen allows the user to define the users who should be included in the training request. There are two view options for selecting users for training: **View Hierarchy** and **Search For Users**. The **View Hierarchy** option displays a hierarchy of your organisation and allows you to select either individual users or groups by ticking the appropriate checkboxes.

Figure 30: Selecting users from the WFM hierarchy

Once you've made a selection, Click the **>** button to add the users to the Selected Users box on the right side of the page. If you wish to remove users from the Selected users box, tick their checkboxes in the selected users box and click the **<** button. It is possible to add whole groups to the selected users box in this view, rather than adding many users individually.

The **Search For Users** tab allows you to search for users in your organisation and add them to the selected users box. The search box requires two characters or more and will list results in alphabetical order by last name, then by first name. The search feature looks for the search value in users' first names, last names and employee Ids. If only a single word is specified, the results will include any user where the word occurs in either first name, last name or employee Id. If more than one search term is specified, the results will include only the users where all of the search terms are present in the first name, last name and/or employee Id. The search feature is not case sensitive.

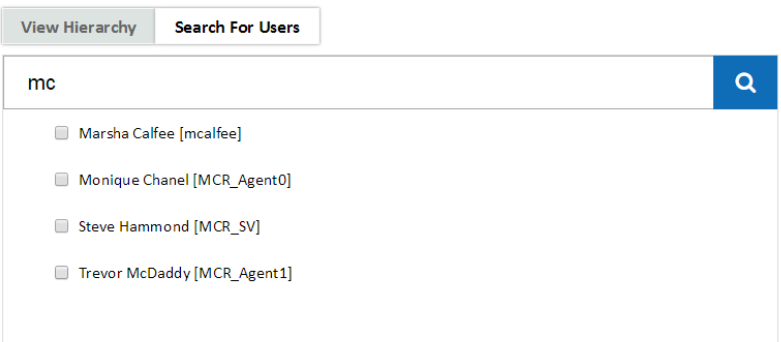


Figure 31: Searching for users

As with the **View Hierarchy** mode, users can be added to the training request by ticking their checkboxes in the search results and clicking the **>** button. Likewise, users can be removed from the training request in this mode by ticking the checkboxes in the selected users box and clicking the **<** button.

There are no restrictions to the use of these two modes; some users/groups can be added via the **View Hierarchy** option and other users can be added via the **Search For Users** tab.

Click the **Submit** or **Schedule** button in the bottom-right corner of the page to submit your training request, once you are happy with the specified form entries and user selection. When selecting **Schedule** your request will be added to a queue and will be processed automatically. Submitted or requests that can't be scheduled will be set to the status *Requested* so that a Resource Planner can review your request. Once the training request has been saved, you'll see a 'Your request has been submitted.' Message and have the option to either return to the Portal home page or submit a new training request. The new training request will then be available to Training Manager users under the Training Requests/ Pending menu. They will then be able to edit all of the submitted information (including the user selection), then search for and publish training sessions. Published sessions will then appear in the attendees' Portal calendars as normal.

Note: It is possible to add groups to the training request in the View Hierarchy option. This will result in the groups being listed in the selected users box. Opening the groups in the selected box via the hierarchy view allows the removal of individual users from the selection. This will result in the remaining members of that group being listed individually rather than as part of the group.

11 Resources Wall Chart

The Resources Wall Chart in Portal allows managers, trainers and administrators the ability to view calendars for multiple agents at the same time. To view calendars select the managers/trainers/rooms from the tree view on the left side of the screen by ticking the associated checkboxes. Use the Today button to move the calendar view to the current date. The < and > buttons move the date range backward/forward either a day/work week/week or month depending on the calendar view mode. Hovering over the calendar entries will result in the display of a label that will contain more detail about the calendar item.

The Wall Chart supports three types of view:

- Calendar views (day, work week, week and month), which show events in a traditional calendar format
- Agenda view, which shows individual upcoming events for the selected date window
- Timeline views (day, work week, week and month), which present events in a continually scrolling line

The wall chart screens can be configured to only show business hours by specifying the business hours in the Portal System Settings page. The **Show full day** option remains available in Wall Chart after specifying business hours. Toggling between business hours/full day is not available in Month and Timeline Month views.

The colours used by the wallchart view will differ depending on which viewing option has been selected. If timeline views are selected, the colours used to display items in the wallchart will match the items in the item selection tree on the left of the page. If any of the non-timeline viewing modes are selected, the colours used will match the items' booking categories. The legend above the wallchart can be expanded to show which colours are related to which booking categories.

Notes:

The viewing of agents' calendars is not supported in this view – only manager, trainer and room calendars are available.

The calendars that are available depend on the type of user who is logged in. Administrators can see calendars for trainers, managers and rooms. Trainers can see calendars for other trainers and rooms. Managers can see calendars for other managers and rooms.

Agents do not have access to this page.

Calendar entries will only appear in the Wall Chart if they are set to **Approved** or **Completed**, unless Portal is set to display items that are set to **Pending Approval**.

If a room has been mapped to an Exchange room, any appointments entered directly into the Exchange calendar for that room will also be included in the data shown on the Wall Chart view.