

Genesys Training Manager 8.0

Administrator Guide

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

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Table of Contents

About Genesys Training Manager	9
Intended Audience	10
Making Comments on This Document	10
Contacting Genesys Technical Support	11
Related Documentation Resources	11
Document Conventions	12
Document Version Number	12
Screen Captures Used in This Document	12
Type Styles	13
Genesys Training Manager	16
Logging On	16
Logging Off	16
Genesys Training Manager Components Overview	19
Configuring Genesys Training Manager	21
Creating Locations	22
Deleting Locations	25
Creating Rooms	26

Deleting Rooms	28
Creating Trainers	29
Working Hours	34
Working Rules	35
Locations	36
Remove the Home Location	37
Skills	38
Creating Trainer Skills	39
Deleting Trainer Skills	41
Deleting Trainers	42
Create Managers	43
Set Your Regular Working Hours	47
Set Exceptions to Your Regular Working Hours	48
Associating Managers to Teams and Teams to Locations	49
Deleting a Manager	54
Skills Portal - Creating & Managing User Access	55
Creating a WebPortal Administrator	56
Deleting a WebPortal Administrator	58
Trainer & Manager WebPortal Access	59
Managing the Welcome and Header Titles in Training Manager Portal	61
Managing Room Bookings	63
Deleting a Manual Room Booking	66
Enhanced Trainer Configuration & Visibility	67
Trainer Hierarchy	67
Trainer Calendar	70
Delete a Trainer Calendar Entry	

Scheduler	74
Date Exclusions	74
Removing a Date Exclusion	75
User Exclusion	76
Removing a User from Exclusion	78
Completion Status Report View	79
Configuration	80
Training Categories	80
Deleting a Training Category	84
Meeting Types	85
Deleting Meeting Types	88
Raising a Training Request	89
Site Selection	94
User Selection	95
Team or Individual	96
Last Name or First Name	97
Activity	98
Skill and /or Proficiency Level	102
Pattern Matching	105
Creating Training Plans	106
Creating a New Event	107
Resources	110
Workforce Schedule	112
Optimization Algorithm Window	120
Event Details	121
Training Window	121

Excluding Training Dates	122
Interruptible Activities	125
Optimization Algorithm Template	126
Time and Travel Constraints	126
Transition Time (minutes)	126
Minimum Activity Gap Before	126
Minimum Activity Gap After	126
Trainer Travel	127
Coverage Tolerance	127
Maximum Team Offline (%)	128
Retrieve Fresh Data from Genesys 7.5	128
Booking Strategy	129
Training Sessions	135
Optimized Algorithm Results for Trainer and Room Only Scheduling	138
Committing Training Activity into Genesys WFM	141
Cancelling a Training Session(s)	144
Cancelling a Training Session for an Individual	145
Scheduling Mop Ups	149
Trainer and Room Hot Swaps	154
Using Scenarios for 'What If' Scheduling	157
Manual Scheduling	
Manual Scheduling	
	172
Deleting a Training Request	172
Deleting a Training Request	172 173 185

Training Request Start Date Filter	195
Reports	197
Training Request Completion Report	197
Training Summary by Status Report	198
Agent Detail Completion Report by Training Event	
Completion Status Report	
Individual Agent Training Summary Report	201
Exportable Training Overview Report	204
Multiple Trainer Courses Report	206
Useful Tips	207



Chapter

Preface

Welcome to the *Genesys Training Manager 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 WorkForce Management (WFM).

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

This document is valid only for the 8.0 releases of this product.

Note:

For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at <u>orderman@genesyslab.com</u>.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 9.

About Genesys Training Manager

Genesys Training Manager enables companies to create, manage, and schedule multiple agent training activity, team meetings, and one-to-ones automatically in Genesys WorkForce Management (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, and if there were any non-attendees these can be "mopped-up" automatically as part of the scheduling process.

Intended Audience

This document is primarily intended for system administrators or other individuals who install the Genesys Training Manager.

Making Comments on This Document

If you especially like or dislike anything about this document, feel free to e-mail your comments to <u>Techpubs.webadmin@genesyslab.com</u>.

You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document. Please limit your comments to the scope of this document only and to the way in which the information is presented. Contact your Genesys Account Representative or Genesys Technical Support if you have suggestions about the product itself.

When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

Contacting Genesys Technical Support

If you have purchased support directly from Genesys, contact Genesys Technical Support at the following regional numbers:

Region	Telephone	E-Mail
North America and Latin America	+888-369-5555 (toll-free) +506-674-6767	support@genesyslab.com
Europe, Middle East, and Africa	+44-(0)-1276-45-7002	support@genesyslab.co.uk
Asia Pacific	+61-7-3368-6868 (International)	<u>support@genesyslab.com.au</u>
Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868 (International)	<u>support@genesyslab.com.au</u>
India	1-800-407-436379 (toll-free) +61-7-3368-6868 (International)	support@genesyslab.com.au
Japan	+81-3-6361-8950	support@genesyslab.co.jp
Before contacting technical support, refer to the <i>Genesys Technical Support Guide</i> for complete contact information and procedures.		

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

• The *Framework 8.0 Configuration Manager Help*, which will help when using Configuration Manager.

Genesys

Consult these additional resources as necessary:

- The *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library CD and which provides a comprehensive list of the Genesys and CTI terminology and acronyms used in this document.
- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at http://genesyslab.com/support.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- Genesys Supported Operating Environment Reference Manual
- Genesys Supported Media Interfaces Reference Manual

Genesys product documentation is available on the:

- Genesys Technical Support website at <u>http://genesyslab.com/support</u>.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at <u>orderman@genesyslab.com</u>.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthand for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

42gp_icg_aspect-wfm_08-2010_v4.2.001.01

You will need this number when you are talking with Genesys Technical Support about this product.

Screen Captures Used in This Document

Screen captures from the Configuration Manager graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the GUI; the error would not be corrected in any accompanying text.

Type Styles

The Type Styles table describes and illustrates the type conventions that are used in this document.

Type Styles

Type Style	Used For	Examples
Italic	 Document titles Emphasis Definitions of (or first references to) unfamiliar terms Mathematical variables Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets below). 	Please consult the <i>Genesys</i> <i>Migration Guide</i> for more information. Do <i>not</i> use this value for this option. A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where <i>x</i> stands for
Monospace font (Looks like teletype or typewriter text)	 All programming identifiers and GUI elements. This convention includes: The <i>names</i> of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. The values of options. Logical arguments and command syntax. Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line. 	Select the Show variables on screen check box. In the Operand text box, enter your formula. Click OK to exit the Properties dialog box. T-Server distributes the error messages in EventError events. If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls. Enter exit on the command line.

Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise.	smcp_server -host <confighost></confighost>
	Note: In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	



Chapter

2 Genesys Training Manager Administrator

Genesys Training Manager

Logging On

Providing the User has authority to access the application, the Log In screen will then be presented as follows:-



Complete the details as required and select OK.

Logging Off

To log out of the application click on 'File' and then 'Exit'.

Training Manager	
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Preferences •	

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



Genesys Training Manager Components Overview

Genesys Training Manager has several key components with a further component available if there is integration into the SkillsAssessor module:

- 1. Training Requests as the name implies this is the menu option to create a 'Training Request'.
 - o Completion Status / Reports
 - Meetings this is the menu option to select to create and schedule any meetings / One to Ones where the team manager is also required.
- 2. 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 per 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 Genesys Training Manager to schedule their team meetings. Managers keep their working hours and unavailability up to date through their web portal access.
- 3. Scheduler exclude users and dates from any scheduled training or meeting activity.
- 4. Training Manager Portal this is where the web portal access is managed. Administrators are created here. Trainer Managers, Trainers, Managers and agents are created automatically, however Trainer Managers, Trainers and Managers have to be granted access to the web portal.

- 5. WFM this is where exceptions can be viewed directly out of WFM and where teams are associated to Managers and Locations.
- 6. Configuration -
 - Training Categories the different categories used in training activity for example,
 Trainer Led
 - Meeting Types the different types of meetings associated to the specific meeting algorithm, for example, One to One, TeamMeeting
 - Booking Categories distinguish the type of category in the web portal, for example,
 Holidays. They are also color coded for easy visibility.
 - Resources Locations, Trainers and Rooms are created configured and managed here.
- Training Manager Portal Authentication, Branding and visibility of training schedules in the web portal is managed here.

These components are covered in detail in the document.

Configuring Genesys Training Manager

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

- Sites or Business Units
- Agents, Agent Groups, Scheduling Pots, Skills (including proficiency levels) and Activities
- Agent WFM schedules

Creating Locations

Genesys Training Manager has to be configured to identify which location Agents, Trainers and Rooms are associated to for scheduling training activity. Therefore the locations first need to exist in Genesys Training Manager.

To create a new location, select 'Configuration'/ Genesys Training Manager/ Resources and then click on 'Rooms'.



By expanding the 'Internal' sub menu, this displays a list of the internal sites. Expand the site to reveal any Rooms associated.



To create a new location, right click on 'Internal' in the sub menu and additional options will appear.



Select 'New Location' and complete the details as required. If the location is a satellite site select the 'Parent Location' from the pull down box. Once the location has been created then Rooms, Trainers and Agent Teams can be associated.

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Deleting Locations

To delete a location, select the location from the Rooms sub menu and then right click on the location and select 'Delete Location'.

Note: A location can only be deleted if there is no activity associated to it.

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Sub Menu		<u>Apply</u>

Creating Rooms

Rooms are also created under the 'Resources' option similar to creating locations.

Select 'New Room' from the options presented and this will then associate the new room to the

location.

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After selecting 'New Room', the following template appears.

Enter a relevant room name (by including the location as part of the room name this will identify where the training is taking place) and any other necessary details.

Select the 'Location' of the room from the drop down box (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 1 and manage the training group size as part of the scheduling process.

If the room becomes unavailable for scheduling then deselect 'Active'. The room will then not appear as available when selecting rooms to schedule training into.

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

Deleting Rooms

To delete a room expand the location and select the required room to delete. Right click on the room and select 'Delete Room' as per the example below.

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

There is however the option to make the room inactive and therefore remove it from the list of available rooms. Deselect 'Active' which will then make the room inactive.

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Creating Trainers

Trainers are created and managed under the Configuration / Genesys Training Manager / Resources option.

Select 'Trainers' and the tree view will appear in the Sub Menu.

Right click on Internal to view any configured Internal trainers



There are three ways to view the trainer structure and by right clicking on 'Internal' in the sub menu the following options are available:

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



2. View by Hierarchy –This lists the trainer manager and their associated trainers (creating the trainers hierarchy will be covered later in the document).



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



A new trainer can be created by either right clicking on the location, or by right clicking on 'Internal' and the option to create a 'New Trainer' will then appear.



Select 'New Trainer' and the following template will appear.

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Enter the details as required and if the trainer is external, then 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 to individual Trainers.

Working Hours

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

Working Hours:

Start – this is the earliest time that the trainer can start work.

End – this is the latest time the trainer can finish work.

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.

Trainer	
First Name Aluma	
- Classin	
Last Name Bushel	
Employee ID 700657979	
Trainer Details	
Manager	
Active V	
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Working Rules

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

Maximum Hours Per Week – this is the maximum number of hours the trainer can work per week.

Minimum hours between Working Days – this is 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.

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Locations

This is the third tab which needs to be completed as part of configuring a new trainer.

This identifies the location(s) where the trainer can deliver training and more than one location can be selected.

When 'Location' is selected the list of locations in the application appears. Select the relevant location and click in the box at the left hand side of the location name. Do the same for each of the locations where the trainer can deliver training. The trainers home location needs to be clearly identified as Genesys Training Manager will always prioritise training to trainers at their Home Location

To set a location as a 'Home Location', click on the icon to the left of the location name and then right click for the 'Add Home Location' option.

SkillsPlanner - Version 2.5 _ D 🗙 Eile Training Applications Help Main Menu Traine 👾 SkillsPlanner First Name 🗉 🔲 Training Requests Alyson Meetings Last Name Bushel Room Diaries Trainer Diaries Manager Diaries Employee ID 700657979 Trainer Details 🛓 🔣 Scheduler 🛛 🦇 SkillsPortal 🔲 Users Genesys WFM Configuration Manager 📇 Eddie Talbot [trainer_manager] ~ SkillsPlanner Training Categories Active Booking Laws Booking Laws Resources Rooms Trainers Managers Booking Categories Working Hours Working Rules Locations Skills Legend Home Location Right-click a Location to change Home status 😑 🛄 Locations Locations Aberdeen Alness Ba Ba Ba Blackburn Sub Menu ⊟ 🔲 Trainers ⊨ 🕕 Internal ^ Add Home Location
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 Gavin Byrne (701572592)

 Janice McCourt (701034271)

 Joe Thomas (803251043)

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

The option to remove the current 'Home Location' is available by right clicking on the location and selecting 'Remove as Home Location'.

The option is then available to select a different home location for the trainer.

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Skills

Select the 'Skills' tab and any skills associated to the Trainer will then be visible.

To add an additional skill right click and select 'Add Skill'.

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A drop down box will then be presented to select the Skill for inclusion.

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Sub Menu		
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Were Training Network Wind Meru Image: Training Network Network Network Training Network Training Network Training Network Network </td <td></td>		

Once selected click on OK and then Apply to save the new skill against the Trainer.

Creating Trainer Skills

The option is available to associate Skills to Trainers as part of the Trainer configuration.

In the 'Resources' option, expand 'Trainer' to reveal 'Trainer Skills'.

In the Trainer Skills sub menu are the Skills available.



To create a new Skill, right click on the Trainer Skill and select 'New Trainer Skill'.



The option to create a new skill code and name is then available.

Select Apply once completed.

🥃 Training Manager	
Eile View Iraining Help	
Ele yew Iraining Help Main Meru Training Manager Training Requests Meetings Configuration Training Manager Cotal Configuration Training Manager Cotal Configuration Training Manager Training Manager Training Categories Booking Categories Booking Categories Booking Categories Booking Categories Booking Categories	Trainer Skill Code Skill Code Name of Skill
Frames Frames	
i 🛞 Preferences 🗸	Apply Cancel

Once the skills have been created they are then available to select as part of the Trainer configuration

Deleting Trainer Skills

To delete a trainer skill, select the skill from the list of trainer skills and then right click and select 'Delete Trainer Skill'.

🥃 Training Manager		_ 0 🛛
Eile ⊻iew Iraining Help		
Ele Yew Training Manager Training Manager Training Manager Portal Training Manager Portal Training Manager Portal Training Manager Portal Port Portaining Categories Recting Categories Training Manager Portal Sub Menu Trainer Skills Trainer Skills Mission Portain State Mission Portain State Manager Portal Sub Menu Sub M	Trainer Skill Code Skill Code Name of Skill Microsoft Excelt Update Information Created Tuesday, 14 July 2003 by Genesys7_5\default Last Updated Monday, 18 January 2010 by GenesysWFM\default	
Preferences +		Apply Close

Deleting Trainers

The option to delete a trainer is available by selecting the required trainer and then right clicking and selecting 'Delete Trainer'.

The trainer can only be deleted if there is no activity associated to them. There is the option however to make the trainer Inactive and therefore unavailable for selection by deselecting 'Active'.

🥃 Training Manager		- 8 🗙			
Eile View Iraining Help					
Main Menu	Trainer				
Training Manager Training Bequests					
Meetings	mgoon				
🕀 🧯 Resources	Last Name Bushel				
	Employee ID 700657979				
	Trainer Details				
E- 🚳 Configuration					
🗐 🥪 Training Manager					
	Harris				
	ManagerEddje Talbot [trainer_manager]				
- Rooms	Active				
	Working Hours Working Rules Locations Skills				
Training Manager Portal					
Bei Vew Training Lelo Main Mou Image: Training Nanage Image: Training Nanage					
	Mon 08:00 🐑 22:00 🐑 11:00 🐑 17:30 🐑				
Alusen Dunkal (700CE79791					
	Sat 06:00 (20) 13:00 (20) (20) (20) (20) (20)				
🔤 Laur 💜 View by Alphabetical Order	Sun 00:00 🐑 00:00 🐑 11:00 🐑 14:30 💭				
Mark View Active Trainers					
A Trac View Inactive Trainers					
1 🗛 = 1 1					
	Constant Fieldsu 1 August 2000 bu Conserve 7 Bildefault				

Create Managers

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

To create a new manager, select 'Managers' by expanding 'Configuration / Genesys Training Manager and then Resources



A list of existing managers will appear in the Sub Menu if the option to 'View by Alphabetical Order'.



'View by Location' view.

😸 Training Manager	
Eile View Iraining Help	
Main Menu	
Training Manager Training Manager Training Acquests Training Acquests Training Manager Training Manager	
Sub Menu	
Pymouth Portadown Portadown Sherwibuy Sicke Stoke Stoke Stoke Truso Truso Truso Modeland Vick Robinson [trid_manager] Nick Robinson [trid_manager] Nick Robinson [trid_manager]	
🔅 Preferences 👻	

To create a new manager right click on an existing manager and select 'New Manager'

炎 SkillsPlanner - Version 2.5		_ B 🗙			
Eile Iraining Applications Help					
Main Menu	nager				
	Manager Fitst Name David Last Name Johnson Employee ID second_manager Manager Details				
View by Location View by Alphabetical Order View Active Managers	Fri 09:00 (2017) III Sat 09:00 (2017) III Sun 09:00 (2017) III				
View Inactive Managers	Update Information				
Preferences 🕶	Created Thursday, 28 May 2009 by Genesys7_5Vdefault Last Lindated Thursday, 20 May 2010 by Genesys7WPM Jdemo				

A window with two options will then be presented.

Configure the managers default working hours in the 'Working Hours' tab.

🥃 Training Manager				
Eile View Iraining Help				
Be Ww Taring Beb Main Menu Image: Training Manager Be Beforg: Beforg:				
Training Requests Training Requests Scheduler Training Anager Portal WFM Configuration Training Anager Training Categories Meeting Types Meeting Types Requests Recourses	Last Name Johnson Employee ID second_manager Manager Details			
Trainers Trainer Skills Managers	Working Houss Start End Enable			
Managers Gordon Apaley H, X Delete Manager Hayley H, Vew by Active Manager View by Active Managers	Tue 0800 € 1700 € ✓ Wed 0800 € 1700 € ✓ Thu 0800 € 1700 € ✓ Fri 0800 € 1700 € ✓ Sat 0800 € 1700 € ✓ Sun 0900 € 1700 € ✓ Update Information ✓ ✓			
Preferences +	Last Updaled Thursday, 2010 by GenesysWFM\demo			

Once the default working hours have been set in Genesys Training Manager these can be changed in the managers' web portal.

The example below displays a manager's web portal home page with two options available under 'additional options'.

- Set your regular working hours
- Set exceptions to your regular hours

GENESYS Generation			Training Manager Training Portal
Location : Main Menu Hello, Gordon Benson			
	my options	training roadmap	
	 calendars manager calendar agent calendar room calendar logout additional options: set your regular working hours set exceptions to your regular hours 	Starting between 30 Jan 2010 and 30 Aug 2010 (A maximum of 10 items are shown below) view the full training roadmap * New iPhone Launch (NIPLOD1) Start Date: 12 Jul 2010 [End Date: 25 Jul 2010 * Blackberry Retraining (BBRT001) Start Date: 26 Jul 2010 [End Date: 15 Aug 2010 * Reserving Rooms & Training (RRT001) Start Date: 2 Aug 2010 End Date: 22 Aug 2010	

Set Your Regular Working Hours

After selecting the option the following window will appear which enables the manager to change their default working hours. The working hours have to be defined as Genesys Training Manager needs to know the managers working hours.

Amend the hours as required and deselect any days that are not working days. This will automatically update the manager's default working hours in Genesys Training Manager.

GENESYS					Training Manager Training Portal
Location : Main Menu > Set Working Day Defaults					
Hello, Gordon Benson					
Set Working Day Defaults					
	2				
	Information				
	Edit the list below to se	t your default working day:	s and hours. This cr	olour indicates a non-working day.	
	Day of week Start	Time End Time	Is a working day		
	Monday 09 💌	00 💌 17 💟 00 💌			
	Tuesday 09 💌	00 💌 17 💌 00 💌			
	Wednesday 09 💌	00 💌 17 💟 00 💌			
	Thursday 09 💌	00 💌 17 💌 00 💌	>		
	Friday 09 💌	00 🕶 17 🕶 00 🕶			
	Saturday				
	Sunday				
	Save				

Set Exceptions to Your Regular Working Hours

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

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

GENESSYS and contraction of contained							Trainir	ng Manage	er Training	g Porta
ocation : Main Menu ≻ Set Working Days										
Hello, Gordon Benson										
Set Working Days										
Note	¥.									
ease do not use this form to define periods of cheduled absence (e.g. Holidays, Training Days) where	Informa	ation								
ou would otherwise be working.	Edit the list be	low to set your	working days and ł	nours. This colour i	ndicates a non-wo	orking day.				
nis form is for specifying UNPAID, NON-WORKING time nly.		Month/Year:	July	2010 💌						
	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
	Thu 1	¥	09 🗸 00 🗸	17 💙 00 💙	V	Sat 17				
	Fri 2	V	09 🗸 00 🗸	17 🔽 00 🗸	×	Sun 18				
	Sat 3					Mon 19	\checkmark	09 🗸 00 🗸	17 🔽 00 🔽	1
	Sun 4					Tue 20	V	09 🗸 00 🗸	17 🔽 00 🔽	\checkmark
	Mon 5	V	09 🗸 00 🗸	17 💙 00 💙	V	Wed 21	\checkmark	09 🗸 00 🗸	17 🔽 00 🔽	V
	Tue 6	\checkmark	09 🔽 00 🔽	17 💙 00 💙	\checkmark	Thu 22	V	09 🗸 00 🗸	17 🔽 00 🔽	V
	Wed 7	\checkmark	09 🗸 00 🗸	17 🗸 00 🗸	¥	Fri 23	\checkmark	09 🗸 00 🗸	17 🗸 00 🗸	\checkmark

The second tab in creating a manager is 'Teams' and managers are associated to their teams in the 'User Selection' process which is covered in the next section.

🥃 Training Manager		L X
Eile View Iraining Help		
Ele ylew Iraning Help Main Menu Training Manager Training Requests Resources Configuration WFM WFM WFM WFM WFM Weatings Training Manager Training Manager Training Manager Training Manager Training Manager Training Manager Training Manager Method Types	First Name David Last Name Johnson Employee ID second_manager Manager Details Image Details Active V	
Booking Categories Booking Categories Booking Categories Trainers Trainers Trainers Skills Training Managers Table Menu To Managers	Working Hour Teams Team Location Site Business Unit Team 3 Warrington Modesto First Direct National Bank	
David Johnson [second_manager] Gordon Benson [first_manager] Galey Haper [12346] Nick Robinson (third_manager]	Update Information	
Preferences +	Created Thursday, 28 May 2009 by Genesys7, 5% default Last Updated Thursday, 20 May 2010 by GenesysW/FM/demo	
	Last Updated Thursday, 20 May 2010 by GenesysWFM\demo	

Associating Managers to Teams and Teams to Locations

For the purpose of scheduling team meetings managers have to be associated to their WFM teams and for the purpose of scheduling classroom training, teams need to be associated to locations.

To associate managers to teams select 'User Selection' from the 'Genesys WFM' main menu option. Click on 'User Selection' in the Sub Menu to reveal the Genesys WFM Sites & Teams in the main window as per the example below.



By right clicking on the relevant team the option is presented to 'Set Location for the Team...' and to 'Set Manager for the Team...'

🥃 Training Manager		- 0 🛛
Eile View Iraining Help		
Main Menu B- 🛬 Training Manager	Display Mode WFM Sites & Teams	
Training Requests Meetings Meetings Meetings Schedder Training Manager Fortal Users VerM Schedding User Selection Gonguration Meeting Types Training Categories Meeting Types Training Categories Trainers Trainers Skills	Image: Section of this is the section of the section of this is the section of th	
Sub Menu		
— 🔲 User Selection		

After selecting 'Set Location for the Team...' the locations are presented in a list to select the relevant location.



After selecting the location from the list, this will appear against the team.



To associate the manager to the team again right click on the team and the option is then available to 'Set Manager for the Team...'

There is also the option to update the managers' team where there is integration into the client HR system.

🥃 Training Manager		. 8 🛛
Eile View Iraining Help		
Main Menu Main Menu Training Requests Metings Schedular Training Manager Potal Training Manager Potal Training Manager Potal Schedular WHM Exception Types User Stection Schedular Manager Potal Schedular Manager Potal Schedular Manager Potal Schedular Manager Potal Schedular Manager Potal Schedular Manager Potal Schedular Manager Potal Manager Potal Man	Display Mode WFM Sites & Teams	
	Remove Location for this Team	
Sub Menu		
Preferences 👻		

After selecting the option a list of managers will be presented. Select the relevant manager to associate to the team and click on 'OK'.

😸 Training Manager		_ = ×
Elle View Training Help		
Main Menu	Display Mode WFM Sites & Teams	
Sub Menu Sub Menu	WFM Sites & Teams First Direct Modext Set Manager for 'Team 1' Modext Managers Managers Managers Gradon Benoon [init, manager] Gradon Benoon [init, manager] Minagers Nick Robinson [third_manager] Nick Robinson [third_manager]	
1 mar e	QK Cancel	
Preferences 👻		

Once the manager and location has been selected this will show against the team.

😸 Training Manager	
Eile View Iraining Help	
Configuration Configuration	Display Mode WFM Sites & Teams
Sub Menu	
Preferences -	

The team would then automatically appear in the Manager 'Team' view list.

😸 Training Manager		- 6 🗙
Eile Yiew Iraining Help		
Main Menu	/ Manager	
Training Manager Training Manager Training Requests Training Requests Bestings Bestings Bestings WFM WFM Exception Types User Selection Second Second	First Name Gordon Last Name Benson Employee ID first_manager Manager Details Image Details	
Contraining Manager Categories Booking Categories C	Active	
Plymouth Pottadown Steffeld Strewsbury Steffeld Stoke	Update Information	
Wick Hobinson [third_manager]	Created Thursday, 28 May 2009 by Genesys7_5Ndefault Last Updated Thursday, 20 May 2010 by GenesysWFMNdemo	

Deleting a Manager

To delete a Manager, right click on the manager and select 'Delete manager...'

😸 Training Manager		ð 🗙
Eile View Iraining Help		
Main Menu	Anager	
📮 😓 Training Manager		
Training Requests Meetings	First Name David	
Resources	Last Name Johnson	
🕀 📰 Scheduler	Employee ID second_manager	
Training Manager Portal	Manager Details	
Green WFM	Manager Details	
User Selection		
😑 🎯 Configuration		
E 😸 Training Manager		
Training Categories Meeting Types	Active 🗸	
- Booking Categories	Mathematica a	
E a cources	Working Hours Teams	
Rooms Trainers	Working Hours	
Managers	Start End Enable	
😸 Training Manager Portal		
Sub Menu	Mon 09:00 🐨 17:00 🐨 🗹	
- I Plymouth	Tue 09:00 🐑 17:00 🐑 🗹	
Portadown	Wed 09:00 🐑 17:00 🐑 🗹	
- Reffield	Thu 03:00 🐑 17:00 🐑 🗹	
- 🛄 Skelmersdale	Fri 05:00 🐑 17:00 🐑 🗹	
- 🛄 Stoke - 🛄 Sunderland 宵 New Manager	Sat 09:00 😴 17:00 😴 🗹	
- Thurso	Sun 09:00 🔿 17:00 🕤 🗹	
Update Team		
A David Joh	-	
Gordon Be Nick Robin View by Location View by Location	- Update Information	
	Created Thursday, 28 May 2009 by Genesys7_5\default	
View Active Managers	Last Updated Thursday, 20 May 2010 by GenesysWFM\demo	

Skills Portal - Creating & Managing User Access

Select 'Users' under 'Web Portal' to view the user options:

- Administrators are manually created, see the instructions below.
- Manager the Managers web portal view is automatically created when a Manager is created in Genesys Training Manager. The Manager does have to be granted access
- Trainers the Trainers web portal view is automatically created when a Trainer is created in Genesys Training Manager. The Trainer does have to be granted access
- Agents the agent's web portal view is automatically created as soon as they have been selected for training.



Creating a WebPortal Administrator

A new Web Portal Administrator can be created by right clicking on 'Administrator' and then selecting 'New Web Portal Administrator'.

Eile Yiew Iraining Help Main Menu	Bole · A					_ 7
Main Menu	Bole A					
		dministra	tors			
Training Manager Training Requests Training Requests Resources Resources Scheduler Write Exception Types Users Configuration Scheduler Scheduler Scheduler Training Manager Training Manager Sching Categories Booking Categories Sching Categories Sching Categories Resources Resources	First Name	Last Name Administrator	Employe	Access Granted Yes	User Name	
Sub Menu Users	r Refresh 1 Item(s)]				Export

To create a new Administrator, enter the details requested and leave the Login Details as blank to preserve the existing password. This ensures the once the user selects the portal they are logged in automatically.

An Administrator of the Web Portal has read only access to any Trainer Calendar, Room Calendar and Agent Calendar.

🥃 Training Manager	
Eile View Iraining Help	
Main Menu	Training Manager Portal Administrator
Section 2 Training Manager Training Requests Meetings	(W) The Administrator has the highest level of access to be able to view and change schedules and assign permissions.
Resources Scheduler Scheduler Training Manager Portal	First Name <new administrator="" manager="" portal="" training=""></new>
Users	Employee ID
Exception Types	Login Details
Configuration Section Training Manager	User Name
Training Categories	Password Reset Leave blank to preserve existing password
Booking Categories	
Sub Menu	
Indiministrators Managers Managers Managers Managers MAnagers MAnagers MAnagers MAnagers MAnagers	
🖗 Preferences 👻	Apply Cancel

Deleting a WebPortal Administrator

An administrator can be deleted by right clicking on the required administrator and selecting 'Delete Training Manager Portal Administrator'.

😸 Training Manager		X
Eile View Training Help		
File Sive Training Help Main Meru Straining Manager Training Requests Training Recurces Scheduler Training Manager Potal Training Manager Potal	Training Manager Portal Administrator The Administrator has the highest level of access to be able to view and change schedules and assign permissions. First Name Test Last Name Administrator Evolution D	
VMM Exception Types Configuration Configuration Training Manager Booking Categories Booking Categories Booking Categories Booking Categories Configuration Managers	Employee ID administrator Login Detais User Name administrator Password Reset Leave blank to preserve existing password Update Information Created Tuesday, 26 January 2010 by GenesysWFM\default Last Updated Thursday, 22 April 2010 by GenesysWFM\default	
Sub infertion		

Trainer & Manager WebPortal Access

Once a Trainer and a Manager exists in Genesys Training Manager they need to be granted access to their web portal. Select the Trainer and Manager (expand the Trainer & Manager tree view) from the list and select 'Access Granted'.

🥃 Training Manager		X
Elle View Iraining Help		
Main Menu	CTraining Manager Portal Trainer	
Training Manager Training Manager Training Requests Training Requests Scheduler Training Manager Potal Users Vertime Manager Training Manager Training Categories Booking Categories Secources Resources Resources Training Manager Training M		
Managers		
Sub Menu		
Trainers Alayzon Bushel (700557379) Alayzon Bushel (700557379) Alayzon Bushel (70057379) Alayzon Bushel (70057379) Alayzon Bushel (7001572532) Alayzon Bushel (7010134271) Alayzon Bushel (70101342163) Alayzon Bushel (7001237016) Alayzon Bushel (70022319) Alayzon Bushel (70022019) Alayzon		Diose
Preferences -	244	<u><u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u></u></u>

There is also the option to view the agents EIN against the agent list by selecting 'Preferences.

ain Menu	Role : Age	nts				
🖳 🦢 Training Manager 📃 🔨	ritolo . rigo	into				
Training Requests	First Name	Last Name	EmployeeID	Access Granted	User Name	
- Meetings	Abel	Penunuri	U 8250 Simulator	Yes		
🕀 🧂 🖁 Resources	Adam	Torres	U 8344 Simulator	Yes		
🕀 📰 Scheduler	Agent	001	Employee_ID_10001_Marseille	No		
🛛 🥪 Training Manager Portal	Agent	002	Employee ID 10002 Marseille			
Users	Agent	003	Employee ID 10003 Marseille			
WFM	Agent	004	Employee ID 10004 Marseille			
User Selection	Agent	005	Employee ID 10005 Marseille	No		
- 💮 Configuration	Agent	006	Employee ID 10006 Marseille			
E S Training Manager	Agent	007	Employee ID 10007 Marseille			
Training Categories	Agent	008	Employee ID 10008 Marseille			
Meeting Types	Agent	009	Employee_ID_10009_Marseille			
Booking Categories	Agent	01	Employee ID 65080 Simulator			
E 2 Resources	Agent	010	Employee ID 10010 Marseille			
- Rooms	Agent	011	Employee ID 10011 Marseille	No		
Trainers	Agent	012	Employee ID 10012 Marseille	No		
Managers 🗸	Agent	013	Employee ID_10013 Marseille			
uh Menu	Agent	014	Employee ID 10014 Marseille			
	Agent	015	Employee ID 10015 Marseille			
a 🔲 Users	Agent	016	Employee ID 10016 Marseille			
😑 🕕 Administrators	Agent	017	Employee_ID_10017_Marseille			
A Test Administrator	Agent	018	Employee ID_10018 Marseille			
Managers Trainers	Agent	019	Employee_ID_10019_Marseille			
	Agent	02	Employee_ID_65081_Simulator			
	Agent	020	Employee ID 10020 Marseille			
u 😸 mm	Agent	021	Employee_ID_10021_Marseille			
	Agent	022	Employee ID_10022 Marseille			
	Agent	023	Employee ID 10023 Marseille			
Show Employee ID	Agent	024	Employee ID 10024 Marseille			
Show Employee ID as Tooltip	Agont	025	Employee_ID_10025_Marcoille			

The options are then available to show either hide or view the EIN number as Tooltip.

In the example above the option to 'Show Employee ID' has been selected.

Managing the Welcome and Header Titles in Training Manager Portal

Any changes required to the welcome or header title in Training Manager Portal are now managed in Genesys Training Manager.

Select the Training Manager Portal menu option under 'Configuration' to reveal additional functionality.

There are now Authentication options.

🥃 Training Manager		_ @ 🔀
Eile View Iraining Help		
Main Menu Training Requests	Training Manager Portal Configuration (
Constant Section 1 Se	Authentication O User Name & Password SiteMinder Authorization Header HTTP_EIN JZero LMS	
Configuration Co	Users Populate from WFM Reset User Names and Passwords Branding Welcome Title Welcome	Amend the welcome and header titles
Sub Menu	Header Title Training Manager Training Portal Visibility	here.
		ge visibility in ng Manager
Preferences 👻		Shoh Direct

Training Manager Portal home page view.

GENESYS	Training Manager Training Portal
Location : Login	
Welcome	
(Welcome)	
To login, enter your User Name and Password b	elow
These details are case-sensitive	
Enter Your Details	
User Name Password	
Continue	
I Trouble logging in?	
– This website uses a Cookie to rememberyour login details. Ifyour	browser is unable to accept Cookies, you will not be able to login.
To try and remedy this, check that your browser is able to accept t	Saokies, or try clearing your Caokies cache.

Training Roadmap visibility in the Training Manager Portal

In the example below a maximum of 10 Roadmap items will be visible on the Home Page.

	Training Manager Training Portal
teation : Main Menu Hello, Gordon Benson	Craining roadmap Starting between 30 Jun 2010 and 30 Aug 2010 (A maximum of 10 items are shown below) view the full training roadmap New Phone Launch (NIPLO01) Start Date: 12 Jul 2010 [End Date: 25 Jul 2010 Blackberry Retraining (BBRT001) Start Date: 25 Jul 2010 [End Date: 15 Aug 2010 Sart Date: 24 Jug 2010 [End Date: 12 Aug 2010 Sart Date: 24 Jul 2010 [End Date: 12 Aug 2010

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 does need to be kept up to date as the application will avoid using any rooms not available.

Any scheduled room activity will automatically update the room calendar.

To manually enter a room booking, select 'Room Booking' from the main menu.

A similar tree view will appear in the sub menu listing all of the locations.



By expanding the location this will list all of the rooms associated.

Right click on the room required and a 'New Room Booking' option appears.

🥌 Training Manager	
Eile View Training Help	
Main Menu	Room Calendar : B&E Aberdeen 1 Stat Date 23 Jul 2010 V End Date 06 Aug 2010 V 28 Refresh
Reetings Restings Restances Restances Restances Restances Restances Restances Restances Restances	Start Time End Time Booking Category Purpose
Scheduler Scheduler Training Manager Pottal Users WFM	
Exception Types User Selection Selection We Configuration	
Craining Manager Training Categories Booking Categories Beoking Categories Bessurces	
Booms	
Room Calendars No Location> AND Location> Aberdeen Ball New Room Booking SERVICEMNIGMT Aberdeen 1	
⊕– Alness ⊕– Bangor ⊛– Barrow	
Blackburn Bertwood Bertwood Carterbury Cardetf Cardeff Carde	
Preferences •	🛃 Export

After selecting 'New Room Booking' the room booking form is presented.

Complete the details as required and select 'Apply'.

🥃 Training Manager		_ @ 🔀
Eile View Iraining Help		
Main Menu	Room Calendar Entry	
Weiling Meeling: Recources Room Calendars Training Manager Colendars Training Manager Portal Users VFM Users Vers User Selection Weiling Types User Selection Weiling Types Recources Recources Recources Recources Recources Recources	Room B&E& Aberdeen 1 Booking Category (None> Purpose Image: Comparison of the state of t	
Sub Menu		
Room Calendars No Location> Alberdeen Bet Aberdeen Bet Aberdeen SERVICEMNGMT Aberdeen 1 Anres SERVICEMNGMT Aberdeen 1 Anres Bargor Bargor Bargor Bargor Canterbuy Canterbuy Canterbuy Canterbuy Canterbuy Canterbuy		Apply Cancel

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

🥃 Training Manager	
Eile View Iraining Help	
Main Meru	Room Calendar : B&E Aberdeen 1 Start Date 02 Feb 2010 Find Date 06 Aug 2010 Find End Date 06 Aug 20
Training Manager Portal Users Werks Configuration Training Anager Training Anager Meeting Training Categories Meeting Types Booking Categories Resources Resources Resources	i
Sub Meru	
🗄 🎲 Preferences 👻	Export

Only room bookings which are not associated to any training activity and have been entered manually can be deleted in the Room Calendar.

Deleting a Manual Room Booking

To delete a manually entered room booking, right click on the calendar entry and then select 'Delete Room Booking'.

Genesys Training Manager will not allow deletion of any scheduled training activity in the room

calendar.

🥃 Training Manager	
Eile View Training Help	
Main Menu	Room Calendar : B&E Aberdeen 1
Training Requests Boom Calendars Boom Calendars Trainer Calendars Trainer Calendars Users Scheduler Users Users Configuration WFM Exception Types User Selection Weding Types User Selection Weding Types Booking Calegories Resources Booking Calegories Resources Booking Calegories Resources Resources	Start Date 02 Feb 2010 End Date 06 Aug 2010 Start Time End Time Booking Category Purpose Tuesday. 6 July 2010 Guid 2010 00:00 7 Jul 2010 August on on.o. Heeking Edd Room Booking Delete Room Booking
Sub Menu	
Room Calendars No Location> No Location> Mexandem Bet Aberdeen 1 Bet Aberdeen 2 SERVICEMNGMT Aberdeen 1 SERVICEMNGMT ABERDEEN S	
Preferences 👻	Export

Enhanced Trainer Configuration & Visibility

Trainer Hierarchy

Creating trainer hierarchy is now available in the trainer menu option (previously it was only possible to allow Trainer managers to view the trainers that reported into them by creating trainer managers in the web portal and then selecting the relevant trainers).

After selecting 'Trainers' from the main menu select a specific trainer and the 'Working Hours' tab window will be presented (in the example below the sub menu view is 'View by Alphabetical Order'). The option is now available to assign a manager from a drop down list of trainers available which Genesys Training Manager uses to create the hierarchy.



In the example on the previous page the Trainer Manager is Eddie Talbot. To view the trainers that Eddie Talbot is allowed to view, change the sub menu view to 'View by Hierarchy' by right clicking on Trainers sub menu option.



By expanding the detail in the sub menu will reveal the trainers that report into the trainer manager.



The trainer manager has visibility of the trainers associated to them and can select to view their activity.

GENESYS		Training Man	ager Training Portal	
Location : Main Menu > Trainer Calendar Hello, Eddie Talbot trainer calendar				
Required fields are all shaded in this colour				
Key Scheduled Training or meeting partially or fully scheduled Completed Training no longer requiring action Other Non-Training Activity	Standard View Planner View Search Ga to Advanced Search Image: Search and the search an	Start Date 16 July 2010	End Date 13 August 2010	Sort By Trainer 💌 💿
trainer ○ View by Location ○ View by Alphabetical Order ○ View by Hierarchy Select All Unselect All □ Internal □ △ Alyson Bushel [700657979] □ △ Dovid Hill [12345678]				

Trainer Calendar

Trainer Calendar availability can be managed in two ways:

1. Manage Trainer availability in Genesys Training Manager.

Select 'Trainer Calendar' from the Main Menu. The locations are then listed in the Sub Menu. Right click on 'Trainer Calendar' to amend the view if required.



To make a new calendar entry, right click on the required Trainer and select 'New Trainer Calendar Entry'.

🥌 Training Manager		X
Eile View Iraining Help		
Main Menu III Room Calendars III Frainer Calendars III Manager Calendars III Manager Calendars	Trainer Calendar : Alyson Bushel Stat Dale 23 Jul 2010 V End Date 06 Aug 2010 V @ Refresh	
Controller Controler Controler Controller Controller Controller	Start Time End Time Booking Category Purpose Image: Start Time Purpose Purpose Image: Start Time <t< td=""><td></td></t<>	
Sub Menu		
True Wairington Algoon Product Interest 2020	Image: Section of the sectio	
Preferences +	🛃 Exp	ort

Complete the details as required, selecting a 'Booking Category' from the pull down box and select 'Apply' once all the details have been completed.

😸 Training Manager		
Eile View Iraining Help		
Main Menu	Trainer Calendar	Entry
Trainer Calendars Manager Calendars Training Manager Calendars Training Manager Pottal Users WFM Users Exception Types User Selection Werm Training Manager Training Calegories Resources Resources Training Calegories Training Managers	Trainer Booking Category Purpose Start Date Start Time Notes	Alyson Bushel [700657973] Alyson Bushel [700657973] None> End Date 30 Jul 2010 End Time 00.00 OO
Sub Menu	-	
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🔅 Preferences 👻		Shhhi Cauca

Delete a Trainer Calendar Entry

To delete a Trainer calendar entry right click on the entry and select 'Delete Calendar Entry...


2. Manage Trainer availability through the Web Portal.

The Trainer now has the ability to manage their availability through their webportal. The option to insert any new activity is available within the 'Planner View' of the Trainer Calendar by right clicking in the calendar view and selecting 'New Entry'.

GENESYS Manufacture Interest					Tra	ining Mana	ger Training Porta
Location : Main Menu > Trainer Calendar							
Hello, David Hill							
trainer calendar							
A Required fields are all shaded in this colour							
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Management Meeting				David I			
Meeting	Mon 26	Tue 27	Wed 28	Thu 29	Fri 30	Sat 31	Sun 01 Aug
Training Session			New entry				
framing session	2	3	Go to today	5	6	7	8
	-		Show 24 hours			,	
	9	10	11	12	13	14	15
	16	17	18	19	20	21	22

Scheduler

Date Exclusions

Specific dates can be stored for excluding when scheduling training.

Select Date Exclusion under the Scheduler option in the Main Menu.

After selecting a date in the calendar, associate it to the relevant business unit by clicking in the box at the right hand side.

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😸 Training Manager				_ 7 🔀
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Main Menu	Date Exelusions			
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Preferences +				

Once the date has been selected close the Date Exclusion box by selecting another item from the main menu.

Removing a Date Exclusion

To remove a date that has been excluded click on the required date and select 'Unselect All'. This will remove the date from being excluded.



User Exclusion

The ability to exclude agents due to long term exceptions is now available.

Select User Exclusions from the main menu.

After selecting 'User Exclusion', the Business Units in Genesys WFM together with the associated agents are then visible in the Sub Menu window.

Any agents excluded previously are visible in the User Exclusion list.

🤘 Training Manager					- 0 ×
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Main Menu	User Exc	lusions			
Vraining Manager Training Requests Meetings			m being scheduled I	for any future Training Event, dill in to the Tree to the bottom-left.	
E Resources	First Name	Last Name	Employee ID	Exclusion Reason	
Room Calendars Trainer Calendars Manager Calendars	📇 Andrew	Faust	U_7004_Simulator	Long Term Sick	
Generations					
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User Exclusions					
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Exception Types					
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🚊 📥 First Direct National Bank					
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i ∰ <none></none>					
e 🏶 Team 1 — 🐣 Amy Jay [U_8306_Simulator]					
Any Say [0_0306_Sinulator]					
Ann Larson [U_8224_Simulator]					
Bandi Neal [U_8232_Simulator]					
Ben Lin [U_8227_Simulator]					
Brian Chen (U_7002_Simulator)					_
Candi Stolpe [U_8329_Simulator]					_
💮 Preferences 👻					

Once an agent has been identified as being unavailable long term, select the agent and the option to exclude the agent from being scheduled for any future training is available.

Select 'Exclude from Schedule' and the option to provide a reason is presented (this information will then be visible in the Completion Status Report if the agent has been selected as part of the 'User Selection').

Select Apply to save.

Terming Bab Main Menu Image: Construction	🥃 Training Manager	
Uter Vector Image: Image:	Eile View Training Help	
Training Requests Besources Besources Subdiver failed and as Training Manager Meeting Types	Main Menu	/ User
Sub Meru Image: State Sta	Training Requests Resources Resources Room Calendars Training Alendars Date Exclusions User Exclusions User Exclusions User Selection Configuration Training Manager	Specify whether this person will be excluded from being scheduled for any future Training Event or Meeting. Name Andrew Faust Employee ID U_7004_Simulator Excluded from all scheduling Reason for Exclusion Long Term Sick Update Information Created Wednesday, 23 June 2010 by GenesysWFM\demo Last Updated Wednesday, 23 June 2010 by GenesysWFM\demo
User Exclusions User Exclusions WFM Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Amodesia Am		
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Removing a User from Exclusion

To remove a user from the exclusion list select the user from the exclusion list and right click selecting 'Remove'.

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Training Manager Training Manager Training Requests Resources Resources Schedular Date Exclusions User Exclusions	Over Exclusions Over Exclusions Over Exclusions Over Exclusion eason Andrew Fault Over Exclusion Reason Remove	
Training Wanager Training Categories Meeting Types		
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Completion Status Report View

The example below identifies the agent as being unscheduled with an exclusion reason of Sickness.

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Once the agent has been removed from being excluded they will show as unscheduled and could be scheduled as a 'mop up' as part of the scheduling process.

Status Filter												
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Configuration

Training Categories

The training categories are linked to the exception codes in Genesys WFM and a training category has to be selected when raising a training request. When training is scheduled it is the exception code that is displayed in the agent schedules and therefore has to 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 and a list of existing categories appears in the sub menu.

Right click on 'Training Categories' in the sub menu and the 'New Training Category' option appears.



After clicking on 'Training Categories' any existing categories are displayed in the Sub Menu.

To create a new category right click on 'Training Categories' in the Sub Menu and select 'New Training Category'



Enter a new name together with any relevant notes.

The 'Default WFM Exception' is the exception code that exists in WFM for this activity and this is entered exactly as it is in WFM. If the code does not match then the exceptions will not be created in WFM and an error will be generated by Genesys Training Manager.



Genesys Training Manager does NOT create exception codes in WFM.

The exception code color can be customized by clicking on the exception code box and selecting a new color.

Note: Ensure that the color assigned does not clash with an existing color in Genesys WFM as this could be confusing from an activity monitoring perspective.



Training categories are individually identified as specific exceptions within Genesys WFM and have an associated exception code and color within the Agent schedule. The category identification can also help with prioritizing training.

Deleting a Training Category

To delete training category in Genesys Training Manager right click on the training category and select 'Delete Training Category'.

🛎 Training Manager			- X
jile Yiew Training Help			
fain Menu	Training Category		
Room Calendars Trainer Calendars Manager Calendars	Name Notes	New Entrant Training	
Scheduler Date Exclusions User Exclusions			
	Default WFM Exception	Training	
Exception Types	Exception Color	Training	
User Selection Gonfiguration	Active		
Section 2 Training Manager Training Categories Meeting Types	Update Information Created Friday, 171	October 2008 by Genesys7_5\default	
Booking Categories	Last Updated Monday, 1	0 May 2010 by Genesy/WFM\default	
Sub Menu	This Exception Ty	pe does not exist on 'Cincinnali'.	
Training Categories Business As Usual Training Business As Usual Training Business As Usual Training Business As Usual Training Category State Ext Wew Active Training Categories Wew Inactive Training Categories Wew Inactive Training Categories		<u>Apply</u>	

Meeting Types

Meeting Types are used only when creating and scheduling Meetings and One to Ones which include the team manager. Different algorithms have been created to manage a team group meeting or individual agent and team manager and these algorithms have to be associated to the right meeting type.

Select Meeting Type from the Main Menu and any existing meeting types are visible in the Sub Menu.



To create a new meeting type right click on 'Meeting Types' in the Sub Menu and select 'New Meeting Type'



Complete the details as required selecting the correct booking algorithm from the pull down box:

- Meeting = Group
- One To One = agent and team manager.

As per Training Categories used in training requests the WFM exception code has to already exist in WFM and exactly match the 'Default WFM Exception' code entered.

A color can be selected for the exception to be visible in the agents WFM schedule.

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Sub Menu				The WFM code has to exactly match the	
Tam Meeting Team Hudde One To One				existing WFM exception code	
Preferences -			L		<u>Cancel</u>

Deleting Meeting Types

Delete a Meeting Type by right clicking on the meeting type and selecting 'Delete Meeting Type...'



Raising a Training Request

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

Training requests can be created by either right clicking on 'Training Request' in the Sub Menu, or on 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.



When the 'New Training Request' option is selected, the template will then appear see the example on the next page.

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Sub Menu	
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E-Sey Training Manager Training Requests Meetings	enter various description	ve and key information about this Training.				
→ Meetings ⊕ ♣ ∯ Resources ⊕ ₩ ₩ Scheduler	Main Title & Reference	<new request="" training=""></new>		•	Training of	code
 Training Manager Portal WFM 	Training Category		~			
	Description & Objectives					
- III Booking Categories	Business Sponsors					
	Stakeholders					
Sub Menu	Additional Notes					
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	Training Manager Portal	Also displayed on the Training Roadmap	5			
- 🍓 Scenario Test	Dates					
	Window Start Date	01 Aug 2010 🕥				
 Ompleted Ompleted Ompleted 	Window End Date	01 Sep 2010				
	C update Information					
Preferences +				< <u>E</u>	Previous Next >	Apply Close

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

Start Tab

Main Title and Reference – enter a title and the box at the right hand side requires the training code.

Training code – is the code associated to the training.

Training Category – identifies the category of training and which exception code will be visible in WFM. The categories are available from a drop down box.

Description & Objectives – this should contain information relevant to the training.

Business Sponsors / Stakeholders / Additional Notes – any information can be entered here that is relevant to the Training Request.

Status – There are four options available from the pull down box:

- 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 into Genesys WFM and is 'good to go'. For a training request to be visible in the web portal the training request has to be shown as 'Active' and have 'Displayed on the Training Roadmap' selected.
- Completed a training request is moved into 'Completed' once it has been completed.
- Rejected where a training request has either been rejected or cancelled.

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Sub Menu The standard standar	Status Pending Approval Training Manager Pottal Active Dates Window Stat Date 01 Aug 2010 Window Stat Date 01 Sep 2010 Window Lind Date 01 Sep 2010	
Preferences 👻	< Previous Next> Apply C	lose

The training window dates will display one month from today's date. This can be manually changed and training will only be scheduled within this window.

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

🤘 Training Manager		_ 7 🗙
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Preferences -	< <u>Previous</u> <u>Apply</u>	Close

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

Site Selection

This is where the Site or Scheduling Pot is selected (and there can be multiple selections).

In the example below there are two Sites, or Scheduling Pots, Modesto and Reston. Modesto has been selected by right clicking in the box at the left hand side.

Once the 'Site' or 'Scheduling Pot' has been selected, the teams and activities associated to the site(s) will be available for selection in the next stage.

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Meeting Types Booking Categories Booking Categories Training Manager Portal Sub Menu		
Training Requests Tay r209-2 Oct 2010 There is a constrained of the constraint of the con		
Preferences 👻	< Previous Next> Group Gose)

User Selection

The User Selection tree view is pulled directly from Genesys WFM in its architectural format which is why Genesys is represented at the top level.



Team or Individual

By expanding one of the Team entries (in the example below Customer Services (Warrington) is selected), this lists all of the users associated to that 'Team'. Users can then be selected as individuals by clicking in the left box at the side of the individual required, or right click in the box against the Team name, for example, Customer Services (Warrington) to select all.

Once users have been selected, the application gives a count of the number of agents selected at the bottom of the window.



Last Name or First Name

Another option is to filter the user list by' First Name' or' Last Name' and then select the users individually from the list presented.

To change the user view, there is a pull down box in 'Display Mode'.



Activity

The option to select agents by 'Activity' is available by selecting the 'Choose' option and the 'User Selection Filter screen appears, as per the example at the bottom of the page.





'Activities' are the Activity sets in Genesys.

In the example below there are 3 Activity sets, Customer Care, Email and New Accounts. If training is to be delivered to agents who have a specific 'Activity' in their Genesys WFM profile then this filter will allow the selection of those agents.

By selecting an activity and then 'Add Matches' the agent names are presented in the right hand window together with an agent count at the bottom of the window.

There are options to view the users selected by Location, Team, Site and /or Business Unit.

Training Manager Aser Selection Filters						_ D 🛛	
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Preferences ▼ ▼ Ready]	71 Matches				<u>C</u> ancel	spply <u>Cancel</u> ust 2010 19:32

Additional activities can be included within the User Selection list by selecting an additional activity from the drop down list, remove the original selection first and then click on 'Add Matches' this will bring up an additional window that allows you to:

- Add to existing Add any agents that are not already in the user selection list.
- Replace existing Only show the 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.



Once OK is selected this will display the users in the user selection tree. See the example below.



Skill and /or Proficiency Level

The second option in the 'Choose' menu is Skills.

Skills identify the call types and users can be selected by their 'Skill' and their level of proficiency.

Select 'Skills' and a drop down box will appear with all of the Skills in Genesys. Highlight the relevant skill and select 'Add' (Multiple skills can be selected).



Once the skill has been selected additional filtering is then available.

This allows Genesys Training Manager to select agents who have a proficiency level of >, < or =.

In the box at the right hand side enter the proficiency level, for example, < =5 for 'Billing' skills less than proficiency level 5.



Then select 'Update Matches' to identify the number of agents selected.

The individual agents are presented in the right hand side window. Select OK to return to the User Selection tab where the users are confirmed as selected.

	🐣 User Selection Filters			_ 🗆 🛛	
Eile Yiew Training Help	Of the selections on all Tabs work together to filter users matching all criteria.		Columns		
Main Menu ————————————————————————————————————	Activities * Skills Pattern Matching		✓ Location ✓ Team ✓ Site ✓ Business Unit		
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Pattern Matching

This allows for key word searching as per the example below.

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

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Elle View Training Help	O The selections on all T	abs work together to filter users matching all criteria.		Columns			
🖃 🧺 Training Manager	Activities Skills Pattern	Matching		🗸 Location 🔽 Team 🗸 Site 💽	Business Unit		
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; wy Preferences ▼						ancel	ist 2010 19:42

Select OK and then 'Apply' and move on to the next tab.

Creating Training Plans

This is where an event is created to associate to the training request. For example,

Event 1 – On-Line Pre Assessment to identify individual training requirements

Once the training plan template is presented, select the new event or training plan icon for the option to create a new Event or Training Plan.

Rename the 'Event' for easy identification in reports and in the users' web portal view.



Select Ok and a new Training Plan template appears as per the example on the next page.

Creating a New Event

Once the new Event has been created, it can be renamed and a description can be included within the

'Event Details' box:

😸 Training Manager		
Eile View Training Help		
Ele Yew Iraining Help Main Menu B 🛬 Training Manager		tion Training Plans Training Sevents Training Sessions g Plans and Events to specify how you will deliver this Training. Training Plan Total Duration Total Plan Cost Training Plan 1 01:00 0:00 Event Datals Description Public Description Training Manager Potal Content Link. Training Calegory Trainer Led
Sub Menu Training Requests I Apr 2009 - 2 Oct 2010 Pending Approval Pendin		Delivey Method Classroom
Preferences +		C Eleanors Rew > Shoha Close

- Description any information entered here is only visible in Genesys Training Manager
- **Public Description** any information entered here will be visible in the web portal.

Web 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.

Training Category is selected from a drop down box (the associated exception code and color will be published in Genesys WFM).

Delivery Method - this is selected from the drop down box and there are two methods available:-

- Classroom the agents will be scheduled in groups
- *e-Learning* the agents will be scheduled individually.



Once all of the details are entered, select 'Schedule' and this presents the Scheduler.
The 'Scheduler' contains the 'Event Details' and the information is brought forward from 'Scheduling Options' in the 'Training Plan' tab. The training request name and training window are carried forward from the training request 'Start' tab.

If any information is changed in the template then the information has to be saved before continuing.

	8 8		
😸 Training Manage	🗷 Training Plan 1 > Event 1 - [Schedule Event]		
Eile View Training He			
Main Menu	Event 1		
Training Manager Training Requ Meetings	Duration (thr.tmn) 10:00 - Duration includes Lunch Break Repeat Days 1 - Min. Group Size 0 - Max. Group Size 0	Se Event	
Resources Scheduler	Resources Optimised Manual	📮 Modesto 💌	
😟 🥪 Training Manager	Warkforce Schedule :	Activity	
⊕ 🥪 WFM ⊨ 🎡 Configuration	B a Resources	Customer Care	
😑 🥁 Conligation of Man		🗹 Email	
- Training (🕀 🔔 Aberdeen 🗮 🚊 Alness 🖉	New Accounts	
Meeting 1	e 🔜 Bangor e 🔜 Barow	Activity Set	
⊕ 🎥 Resource	⊕ras Baitw ⊕ras Blackburn		
— 🥁 Training Man	Brentwood	🔲 E-mail	
	⊕ Canterbury	Meals	
	⊕- <u>_</u> Cardiff	Meals	
	🐵 🔜 Doncaster	36-Min Meal	
	(a) Choose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver this Training.	Meal	
Sub Menu	🗄 🗔 Select All 💥 Delete 🔗 Refresh 🙀 Export	Breaks	
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Preferences -	0 Rem(s)	<	ply <u>C</u> lose
' Ready	Completion Status	ОК	t 2010 19:52

'Training Time Slots' Window

There are 3 tabs in the 'Training Time Slots' window:

- Resources
- Optimized
- Manual

Resources

This is where the Rooms and Trainers are selected if there is a requirement for them to be scheduled as part of the training request.

Identify the location(s) for the training and the rooms and trainers associated to the location are made visible by expanding the location name; see the example for Warrington below.

Select the Room(s) and Trainer(s) by clicking in the box at the left hand side.

If no Room(s) and / or Trainer(s) are required then nothing should be selected.

If there is only a requirements for reserving rooms, right click on the location name and select Reserve Places.



The option to enter a number of places is then available, enter O to remove any previously Reserved Places.

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

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

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🗄 🛄 Truro		
🕞 🛄 Warrin	gton (20 Reserved Places)	
	B&E Warrington 2	
🔽 🛃	B&E Warrington 3	
🖂 🕰	B&E Warrington 5	

Select the preferred Rooms by clicking in the left hand box against the room name and Genesys Training Manager will reserve room(s) up to the number of places requested as part of the scheduling process. Don't forget to select the Rooms to be reserved and the trainers if required.

To remove Reserved Places enter 0 to reset.

Reserved Places (0 =	= Reset)	X
•	<u>D</u> K <u>C</u> ancel	

Workforce Schedule

This is where the Genesys WFM schedule is selected to schedule the training activity into.

There are two options:

- Use the Master Schedule (this is the 'live' schedule)
- Use a Scenario or Multiple Scenarios (this is where 'What If' schedules can be 'played with' without impacting the 'live' schedules)

If 'Master Schedule' is selected this will schedule any training activity directly into the agent's live schedules.



If 'Scenario' is selected, the option to select the relevant scenario from a drop down list is presented.

Single or Multiple Scenarios can be selected to view the impact of the training activity by highlighting the scenario(s) required and select 'Add Scenario'.

Scenarios can be sorted by descending date or alphabetically.

📧 Choose Workforce Schedule(s)				
Choose the Schedule(s) that will be used to search and book				
🔿 Use the Master S	chedule			
💿 Use a Scenario o	or multiple Scenarios			
Name	Start Date End Date			
📰 2010-Weeks21-2	4 23 May 2010 19 Jun 201	10		
- Scenarios				
Sort by Descer	nding Date 💿 Sort Alpha			
📰 2010-Weeks2	1-24	<u>A</u> dd Scenario		
	1.24			
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2010-Weeks25	5-28 3-32			
2010-Weeks25 2010-Weeks25 2010-Weeks33	5-28 3-32 3-36			
2010-Weeks25 2010-Weeks25 2010-Weeks33 2010-Weeks33 2010-Weeks37	5-28 3-32 3-36 7-40			
2010-Weeks25 2010-Weeks25 2010-Weeks33	5-28 3-32 3-36 7-40 1-44	Cancel		

Genesys Training Manager will only schedule training activity into the Schedule or Scenario(s) selected.

Once the required Master Schedule or Scenario has been selected let's look at the different combinations of training that can be scheduled.

Genesys Training Manager can create any combination of Room, Trainer and Agent. The following pages will demonstrate some of the different training scenarios options available:-.

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.

Training Time Slots Resources Optimised Manual	
Workforce Schedule :	
Resources No Location> Reston Building Reston Building	
 Choose the Rooms and Trainers to host and deliver this Training Event. 	

Expand the tree view to view the Rooms and Trainers associated.

Training Time Slots Resources Workforce Schedule : Choose Schedule > Resources Modesto Building Modesto Room 1 Modesto Room 3 Modesto Room 3 Modesto Room 3 Modesto Room 3 Modesto Room 3 Modesto Room 3 Modesto Room 3 Modesto Room 3

The room(s) and trainer(s) required are selected by clicking in the box at the left hand side.

Once the room(s) and trainer(s) have been selected, select the Optimized tab and follow the process.

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, Genesys Training Manager still needs to be configured with all of the relevant information, excluding the User Selection up to the Scheduler stage as per the example below.

To reserve the correct number of rooms, right click on the required location and a 'Reserve Places' option appears.

Training Time Slots		
Resources Optimised Manual		
Workforce Schedule : < <u>Choose Schedule></u>		
Resources No Location> Modesto Provention Modesto Room 2 Modesto Room 3 Amanda Hughes Difference resources		
In the second s		
Choose the Rooms and Trainers to host and deliver this Training Event.		

After selecting 'Reserve Places' enter the number of agents expected, for example, 20

Training Time Slots		
Resources Optimised Manual		
Opanioda Manaa		
Workforce Schedule : < <u>Choose Schedule></u>		
🖃 🧝 🖁 Resources		
No Location>		
🖨 🛄 Modesto Building		
Modesto Room 1	1	
- 🗍 🟹 Modesto Room 2		Enter the number
🚽 🗐 Modesto Room 3		
🚽 🔁 Amanda Hughes		of places
- Bill Cooper		
📃 🔼 David Williams		
🖶 📄 Reston Building 🥼		
	Reserved Places (0 = Reset)	
(2) Choose the Rooms and Trainers to host and deliver this	20 -	
Choose the Rooms and Trainers to host and deliver this		
L	<u>K</u>	<u>C</u> ancel
C Training Sessions		

Select OK.

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

Workforce Schedule : <u><choose schedule=""></choose></u> Resources (No Location> Modesto Building (20 Reserved Places) Modesto Room 1 Modesto Room 2 Modesto Room 3 Modesto Room 3 Devid Wolliams Devid Williams Buil Cooper Reston Building	Places reserved against the location	

Select the preferred 'Rooms' and 'Trainers' for the training session as normal.

S S Realth & Safety Follow Up / Event 1 - [Schedule Event]	🛛 🔁
Ele 1 Main M CEvent 1	
🖅 Duration (hh:mm) 🚺 - OO 🔺 🗋 Duration includes Lunch Break Repeat Days 1 💭 Min. Group Size 4 🌩 Max. Gro	up Size 10 😴 🔄 Save Event
CTraining Time Slots	
Resources Optimised Manual	Modesto
Workforce Schedule: < <u>Choose Schedule></u>	Activity
	Customer Care
- No Location>	Email New Accounts
Select Booms and	
P M Modesto Room 2	Activity Set
Amanda Hughes	E-mail
Bill Cooper	Meals
🖻 🕮 🐘 💮 🚛 Reston Building	36-Min Meal
	Meal
Ochoose the Rooms and Trainers to host and deliver this Training Event.	Breaks
Sub Me	Break 1
Barrier Select All 💢 Delete 🤣 Refresh 📮 Export	Break 2
💮 Start Date End Date Schedule/Scenario 🚮 Room Max Seats 📥 Trainer 📥 Employee ID # Users # Attended # Co	mpleted 🔉 Ex
Ť.	
i @P	
Sev F Completion Status	ОК

Once the 'Resources' have been identified, select the 'Optimized' tab to move to the' Optimization Algorithm Template'.

* S 🖃 Health & Safety Follow Up / Event 1 - [Schedule Event]	
Ele 1 Main M CEvent 1	
	Save Event
Training Time Slots Resources Optimised Manual	Interruptable Activities
Workforce Schedule :	Activity
Resources And noration	Customer Care Email
Addesto Building (20 Reserved Places)	New Accounts
Modesto Room 2 V Modesto Room 3 V Amade Hudges	Activity Set
	Meals
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Sub Me 7 Training Sessions	Break 1
Select All X Delete Z Refresh 🚽 Export	Break 2
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i @P	
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Agent Only Scheduling

To schedule Agents only, create the Training Request using the template wizard as normal, selecting the required agents in the User Selection window. Ignore Resources in the Optimization Algorithm Template and continue from the Optimization tab.

Optimization Algorithm Window

The Optimization Algorithm Template (see example below) is where the business constraints are configured that the algorithm uses to schedule training sessions into Genesys WFM.

It is divided into five sections:

- 1. Event details
- 2. Training Window
- 3. Interruptible Activities
- 4. Optimization Algorithm
- 5. Booking Strategies
- 6. Training Sessions

Minimum Activity Gap eterie Minimum Activity Gap eterie Minimum Activity Gap eterie Minimum Activity Gap eterie Trainer Travel Fit Bool (1) 100 (2) 100 (2) (2) Sat Bool (2) 100 (2) 100 (2) (2) Booling Strategy Retrieve fresh data from Genesys WFM (2) Breaks Break 1 Break 1 Break 1 Break 1 Break 1 Break 1 Break 1 <th>S 🖃 Health & Safety Follow Up / Event 1 - [Schedule Event]</th> <th> Z</th> <th>PX</th>	S 🖃 Health & Safety Follow Up / Event 1 - [Schedule Event]	Z	PX
Persources Optimized Maxual 3 Modesto Optimized on Algorithm Template 3 Activity Optimized on Algorithm Template 7 Activity Time & Travel Constraints To 2 Stat Date Time Training Station Algorithm Template Weid 8800 1300 Y Y Customer Care Weid 8800 1300 Y Stat Date Time End Date Time Minimum Activity Gap Before Weid 8800 1300 Y New Accounts Activity Set Trave 1 Stat Date Time End Date Time Performance Constraints Sun 0900 1300 Y Build Dates Exclude Search Maximum Teem Office (3) 100 Performance Sonking Strategy Retrieve freth data from Genesys WFM Heads Stat Date End Date Schedkall Delete Retrieve freth data from Genesys WFM Breaks Stat Date End Date Schedkall Date Schedkall Break 1 Break 2 Stat Date End Date Schedkall Schedkall Sche	L Duration (hhmm) 01:00 💭 🗋 Duration includes Lunch Break Repeat Days 1 🐑 Min. Group Size 4 🐑 Max. Group Size 10 🐑		
6 Select All X Delete ∂ Refresh Export Select All X Delete ∂ Refresh Room Max. Seats Traineri Employee ID # Users # Attended # Completed Schedule/Scenario Room Max. Seats Traineri Employee ID # Users # Attended # Completed Schedule/Scenario Seat S	Resources Optimised Manual 3 4 Optimisation Algorithm Template From To E 2 18 Jan 2010 to 28 Jan 2010 7 Time & Travel Constraints Tue 08:00 © 19:00 © V Y 8 Mon From To E 2 18 Jan 2010 to 28 Jan 2010 V Y Time & Travel Constraints Tue 08:00 © 19:00 © V V Minimum Activity Gap Before 0 Thu 08:00 © 19:00 © V Fit 08:00 © 19:00 © V M M M Performance Constraints Sun 09:00 © 13:00 © V M Coverage Tolerance 250 © 13:00 © V Diation Dates Exclude Search → Maximum Learn Offline [2] 100 Pokimum Strategy Patient Red Ath from Strategy	Modesto Activity Customer Care Email New Accounts Activity Set E-mail Gense Ge	
	6 Select All X Delete & Refresh X Export Select All X Delete Refresh X Export Start Date: End Date: Schedule/Scenario A Room Max Seats A Trainer A Employee ID # Users # Attended, # Completed A E	·	

Event Details

This information is brought forward from the information entered in the 'Scheduling Options' window in the 'Training Plans' tab. Amendments can be made to the detail here if required.

Training Window

The dates in the 'Training Window' are brought across from the date range entered in the 'Start' tab of the training request. The training times are brought across from the times entered in the 'Optimization Algorithm Template' window.

Different templates can be created by changing the 'From' and 'To' times and selecting or deselecting any days, Monday to Sunday. Information can also be changed within 'Time & Travel Constraints' and 'Performance Constraints' and saved as a new template by clicking on the save button. Once the save button is selected the option to rename the template is given which then creates a new template. Once the template has been saved this will be available for selection in the pull down box.

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



Excluding Training Dates

To exclude specific dates from scheduling training activity, there are three options:

• Manual – right click on the specific date within the training window and select 'Remove'.

Training Time Slots					
Resources Optimised Manual					
Optimisation Algorithm Template					Training Window
Mon - Fri 09:00 - 19:00 & Sat 7 ! 💌 🛃 🔀		From	То	Enable	18 Jan 2010 to 29 Jan 2010
Time & Travel Constraints	Mon	08:00 凄	19:00 🛬		Start Date Time End Date Time
Transition Time (minutes) 15 🚭	Tue	08:00 🚖	19:00 🛬	4	18 Jan 2010 08:00 18 Jan 2010 19:00
Minimum Activity Gap Before 🛛 🛛 🚭	Wed	08:00 😤	19:00 斄		19 Jan 2010 08:00 19 Jan 2010 19:00 20 Jan 2010 08:00 20 Jan 2010 19:00
Minimum Activity Gap After 🛛 0 🚭	Thu	08:00 😤	19:00 斄		21 Jan 2010 - 02 00 - 21 Jan 2010 - 19:00 22 Jan 1 💥 Remove
Trainer Travel	Fri	08:00 🚖	19:00 🛬		23 Jan 2900 05:00 23 Jan 2000 13:00 24 Jan 2010 09:00 24 Jan 2010 13:00
Performance Constraints	Sat	09:00 😤	13:00 🛬		25 Jan 2010 08:00 25 Jan 2010 19:00
Coverage Tolerance -250 🔿	Sun	09:00 震	13:00 🏯		Build Dates Exclude <u>S</u>earch ⇒
Maximum Team Offline (%) 100 会		ig Strategy omly Distribute		~	Retrieve fresh data from Genesys WFM 🛛 🔽
	Inando	iniy Distribute		~	

 Automatic – select the 'Exclude' button at the bottom of the 'Training Window' and a new window will appear.

Exclusion dates can be selected by line of business and Genesys Training Manager will exclude them as part of the scheduling process. Select the date from the calendar and then select the line of business either by clicking on the box at the left hand side or clicking on the 'Select All' button.

Note: The dates will still appear within the 'Training Window' but will be excluded for the line of business in the scheduling process.



Excluding dates from the Main Menu

There is also an option on the main menu now to exclude specific dates.

🥃 Training Manager			d X
Eile View Iraining Help			
Ele gew Training Help Main Menu	Date Exclusions Image: Consectates which will be excluded for scheded Mon Tue Weal Thue Fin Sat Survey Mon Tue Weal Thue	ling These dates will apply to all Training Events. Select Al Unselect All → WFM Business Units & Sites → First Direct National Bank. → Modesto → Reston → Reston	
Preferences +			

Select 'Date Exclusions' from the main menu.

Select the required dates in the calendar view and then select the line of business that the dates is required to be excluded from any scheduled training activity.

Click on the month to select the required month from the drop down box.

🗷 Scheduler Exc	lusion Dates	
Choose dates		ccheduling. These dates will apply to all Training Events. Select All Unselect All Image: Genesys 7.5 Business Units & Sites Image: Genesys 7.5 Business Units & Sites
Today: 17/0 Click a date and the	August September	st
	November December	

1

Any amendments to the 'Optimization Algorithm template' must be saved and will be covered later in this document.

Interruptible Activities

The Activities that can be interrupted will be Site or Scheduling Pot specific. If more than one site is selected within the Site Selection tab then the Site activities have to be selected separately.

Identify each Site or Scheduling Pot from the pull down box and then select which 'Activities' are

interruptible, in other words, training can be scheduled while the User is on this Activity.

Note: If Overtime is an Activity, then it would be available within the Interruptible Activities window. To include the Overtime Activity as part of the training schedule, this would be selected as interruptible.

If full day training is being scheduled then Meals and Breaks Activity may need to be selected as interruptible.

i → S File Main M	Health & Safety Follow Up / Event 1 - [Schedule Event] Event 1 Duration (hh:mm) 01:00 Duration includes Lunch Break Repeat Days 1 Min. Group Size 4 Max. Group Size 10 Training Time Slots	Save Event	
1 2 3 2 3 2 3 2 3 2 3 2 3 2 3 2 3 2 3 2	Resources Optimised Manual Optimisation Algorithm Template Mon From To Enable Time & Travel Constraints Mon 08:00 (*) 19:00 (*) V Transition Time (minutes) 15 (*) Ved 08:00 (*) 19:00 (*) Stat Date Time Enable Minimum Activity Gap Before 0 (*) Ved 08:00 (*) 19:00 (*) V Stat Date Time Enable Training Window Tassition Time (minutes) 15 (*) Ved 08:00 (*) Ved Stat Date Time Enable Stat Date Enable Stat Date Enable Stat Date Enable Enable Enable Stat Date Enable Enable Stat Date Enable Stat Date Enable Stat	Customer Care Email New Accounts	These Activities are interruptible Consider selecting Meals and Breaks as interruptible, if a
· · · · · · · · · · · · · · · · · · ·	Completion Status		training session is over 2.5 hours

Optimization Algorithm Template

There are two sections in this template which affect the Trainer and Room and any performance constraints. The information entered here is used by Genesys Training Manager to understand what the maximum impact to the service can be when scheduling any training activity.

- 1.Time & Travel Constraints
- 2. Performance Constraints

Time and Travel Constraints

This relates only to the Room and Trainer activity.

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. Genesys 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.

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 and this could be at the start of the day or after some other off phone activity, for example, Breaks.

Minimum Activity Gap After

This is similar to 'Before' 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 agents shift as the agent may not sign back on the phones which would affect their adherence.

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 in the first instance this is not selected to prioritise home location Trainers first and then rerun the scheduler again to use Trainers that have to travel.

Coverage Tolerance

This is the difference between staffing required (Calculated) and the actual (Coverage) for the duration of the training session.

The application looks at the required (Calculated) staffing (staffing required based on forecast Service Level and any planned shrinkage) and the actual (Coverage) which is what is actually scheduled including any committed off phone activity. The coverage tolerance is the difference between what staffing you have working (coverage) and what is required (calculated).

For example, Calculated number of Agents is 100 across the duration of the training and the Coverage is 90, if the Coverage Tolerance was -20 only 10 would be selected as the staffing is already 10 short. Genesys Training Manager would not schedule any training activity if by scheduling the training the coverage would then drop below the -20 requirement.



Maximum Team Offline (%)

The maximum % of a Team that can be offline.

Retrieve Fresh Data from Genesys 7.5

This can be left as selected as Genesys Training Manager will retrieve the most up to date information

from Genesys WFM to start scheduling training activity against.

Booking Strategy

Booking Strategy gives the user the option to specify whether the training requests should be Front Loaded, Randomly Distributed or Back Loaded together with the option to maximise the group size.

By selecting 'Front Load' or Back Load, Genesys Training Manager will try and schedule all of the training sessions at the front or the back of the training window, whilst taking into account the 'Performance Constraints', see the example on the next page.

🗷 Training Plan 1 > Event 1 - [Schedule Event]							
Event 1							
Duration (hh:mm) 00:30 💭 Duration includes Lunch Break Repeat Days 1 🐑 Min. Group Size 1 💭 Max. Group Size 10 💭	📕 Save Ever						
Training Time Slots	Interruptable Act						
Resources Optimised Manual	📕 Modesto						
Optimised Search Algorithm Template Training Window	Activity						
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Time & Travel Constraints	🗹 New Accou						
Transition Time (mins) 0 Vice Vice Vice Vice Vice Vice Vice Vice	Activity Set						
Min. Activity Gap Before (mins) 0 🐡 07:00 🐨 11:100 🐨 11:100 07:00 11:100 07:00 11:00							
Min. Activity Gap After (mins) O Thu 07:00 19:00 Image: 12 Jun 2010 07:00 12 Jun 2010 07:00 12 Jun 2010 12 Jun 2010 12 Jun 2010 13:00	📃 E-mail						
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Coverage Tolerance (people) .50 ⊕ Booking Strategy Build Dates Exclude Search →							
Maximum Team Offline (%) 100 🐑 Front Load (Maximise Group Size) Retrieve fresh data from Genesys WFM 🔽	Breaks						
Front Load (Maximise Group Size)	📃 Break 1						
: La Select All 💢 Delete 👸 Rerresh 🔄 Expor	🔲 Break 2						
Exceptions Legend : Randomly Distribute (Maximise Group Si							
💞 OK 🗳 Some/All Missing Back Load (Maximise Group Size)							
Master Schedule (9) Scenarios (0)							
📅 Start Date End Date 🧖 Room Max. Seats 🖧 Trainer 🖧 Employee ID # Users # Attended # Completed 🖧 Name: 🗛							
Training Plan 1 > Event 1							
택 9 Jun 2010 07:00 9 Jun 2010 07:30 None> 10 0 Crystal Ramos 택 9 Jun 2010 08:45 9 Jun 2010 09:15 <none> 10 0 Abel Penunuri</none>							
9 Item(s)	<						
Completion Status	l						

Select 'Randomly Distribute' from the pull down list under 'Booking Strategies' and Genesys Training Manager will try and schedule the training activity across the training window, taking into account the 'Performance Constraints, see the example on the next page.

📰 Training Plan 1 > Event 1 - [Schedule Eve	ent]		
Event 1			
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Optimised Search Algorithm Template		Training Window	Activity
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Time & Travel Constraints	Mon 07:00 会 19:00 🔿 🗹		🗹 Email
	Tue 07:00 🐑 19:00 🐑 🗹	Start Date Time End Date Time A 9 Jun 2010 07:00 9 Jun 2010 19:00 IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	🗹 New Accou
	Wed 07:00 😴 19:00 😴 🗹	10 Jun 2010 07:00 10 Jun 2010 19:00	Activity Set
	Thu 07:00 🐑 19:00 🐑 🗹	11 Jun 2010 07:00 11 Jun 2010 19:00 12 Jun 2010 07:00 12 Jun 2010 19:00	E-mail
	Fri 07:00 🐑 19:00 🐑 🗹	13 Jun 2010 07:00 13 Jun 2010 19:00 14 Jun 2010 07:00 14 Jun 2010 19:00	
Trainer Travel	Sat 07:00 😴 19:00 😴 🔲	15 Jun 2010 07:00 15 Jun 2010 19:00	Meals
Performance Constraints	Sun 07:00 💭 19:00 💭 🗌	16 Jun 2010 07:00 16 Jun 2010 19:00 17 Jun 2010 07:00 17 Jun 2010 19:00	🔲 36-Min Mea
Coverage Tolerance (people) -50 🜪		Build Dates Exclude <u>S</u>earch →	🔲 Meal
Maximum Team Uttline 🕼 🔰 100 📥 🗍	Booking Strategy Front Load (Maximise Group Size)	Retrieve fresh data from Genesus WFM	Breaks
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		>	
9 Item(s)			<
Completion Status			ſ
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Once everything has been entered update the Optimization Algorithm Template by clicking on the save button.

Training Plan 1 / Event (1 - [Schedule Event]	
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Resources Optimised Manual Optimisation Algorithm Template From To Enable Mon - Fri 09:00 - 20:00 Image: Start Date	Activity Customer Care Canal
Betrieve fresh data from Genesys 7.5 Perine templates to control the behaviour of the booking algorithm. Training Sessions Training Sessions Start Date End Date Schedule/Scenario Room Schedule/Scenario End Date Excent Schedule/Scenario Room End Date Excent Schedule/Scenario End Date Schedule/Scena	Breaks Break 1 Break 2
Completion Status	<u></u> K

Select 'Search' to retrieve fresh data from Genesys 7.5.

📧 Training Plan 1 / Event 1 - [Schedule E Event 1 Duration (hh:mm) 📃 Duration include Lunch Break Repeat Days 1 🌲 Min. Group Size 6 🍣 Max. Group Size 10 🤤 01:00 🚍 📕 Save Event Training Time Slots Interruptable Activities Resources Optimised Manual 📕 Modesto ~ Optimisation Algorithm Template Activity Training Window Customer Care From Τo Enable to Mon - Fri 09:00 - 20:00 🗹 Email **~** Mon 09:00 😭 17:00 😤 Start Date Time End Date Time & Travel Constraints Time <u>^</u> Vew Accounts
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 Tue **~** 17:00 09:00 😤 20:00 震 Transition Time (minutes) 15 🊔 20:00 Activity Set **~** Wed 20:00 20:00 09:00 😤 3:00 震 Trainer Travel 📃 📃 E-mail V Thu 2009 20:00 Performance Constraints Please Wait... POOS. 17.00Fri Meals 20:00 V 2009 Coverage Tolerance -500 🚔 Sat 36-Min Meal Please Wait... <u>S</u>earch ⇒ de... Maximum Team Offline (%) 100 🚔 Sun 📃 Meal rom Genesys 7.5 🛛 🔽 Breaks Optime templates to control the behaviour of the book Retrieving 3 Jun 2009 from Genesys 7.5... 📃 Break 1 Training Sessions 📃 Break 2 i 🗔 🗙 | 🖉 😁 Start Date End Date Schedule/Scenario 🚮 Room | 🙈 Trainer| #Users| #Attended| #Completed| 🧟 Exc < > Completion Status.. <u>0</u>K

Genesys Training Manager is retrieving information from Genesys WFM.

Genesys Training Manager has retrieved the information from WFM and is now running an optimized search against the retrieved data based on the criteria specified.

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



Training Sessions

Once completed the training sessions are visible in the 'Training Sessions' window and the red flag at the left hand side indicates that the training has only been created in Genesys Training Manager but has not been committed into Genesys WFM.

As the training sessions were created using the Master Schedule, the information is visible in the Master Schedule tab together with the number of sessions created. In the example below the number of session is 9.

If a Scenario had been chosen to run the schedule against to view any created training sessions the 'Scenario' tab needs to be selected to view the session details.

🗷 Training Plan 1 > Event 1 - [Schedule Event]							
c Event 1							
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Training Time Slots	Interruptable Act						
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Optimised Search Algorithm Template Training Window	Activity						
Monday - Friday 07:00 - 19:00 V 🔄 🗙 From To Enable 9 Jun 2010 to 9 Jul 2010	🗹 Customer C						
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Tue croc Tue Statt Date Time End Date Time	🗹 New Accou						
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13Jun 2010 07:00 13Jun 2010 19:00	C-IIIdii						
Trainer Travel Sat 1000 @ 1500 1000 1300 1300	Meals						
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Maximum Team Offline (%) 100 Booking Strategy	Breaks						
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Front Load (Maximise Group Size)	Break 1 Break 2						
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Exceptions Legend : Back Load							
Master Schedule (9) Scenarios (0)							
📑 📅 Start Date 🛛 End Date 👘 🕺 Room Max. Seats 🙇 Trainer 🙇 Employee ID # Users # Attended # Completed 📇 Name(: 🛆							
Training Plan 1 > Event 1							
🖷 9 Jun 2010 07:00 9 Jun 2010 07:30 <none> < None> 10 0 Crystal Ramos</none>							
📲 9 Jun 2010 08:45 9 Jun 2010 09:15 < None> < < > < 10 0 0 Abel Penunuri 🗹							
9 Item(s)	<						
Completion Status	(

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

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

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

Schedule / Scenario – identifies which Schedule or Scenario Genesys Training Manager has taken the data from and scheduled the training activity into. In the example above, the Schedule used is the Master Schedule.

Note: If the scheduled training was committed to the Master Schedule, this would be immediately visible in the Agents schedules, as confirmed training.

If a Scenario has been used, this allows for 'What If' planning and can be used to view what the impact of the training would be on resource and performance.

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

Max Seats – the maximum capacity of the room.

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

Users – 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.

Exception - this is the Genesys WFM code and color that will be visible in the agents schedule in WFM.

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

The Completion Status Report also has the option to include additional information:

- Location
- Team
- Site
- Business Unit

See the example below.

A gauge has also been included which gives visibility of how complete the training event is and there is an export option in the bottom right hand corner to export the information into excel.

Training Session Fi	Filter 10 Jan 2010	End Date	e 24 Jan 2010	~	availa	ed view ble with down box				<u> </u>	
Statistics for this E	Overa	all Completion D.0%	# Scheduled # Unscheduled # Trained # Untrained / Par	tially Trained		0 78 0					
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Location First Name Abel Amy Andrew Ann Bandi Ben Brian Cassandra	Last N Penunuri Jay Reicher Faust Larson Neal Lin Chen Stolpe Poorman	Employee ID U_8250_Simulator U_8306_Simulator U_7004_Simulator U_8224_Simulator U_8232_Simulator U_8232_Simulator U_7002_Simulator U_8232_Simulator U_8236_Simulator	Location Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building	Team 3 Team 1 Team 3 Team 1 Team 1 Team 1 Team 1 Team 1 Team 1 Team 3	Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto	First Direct National Bank First Direct National Bank	Health & Safety Follow Up Health & Safety Follow Up	HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005	Health & Safety Follow Up Health & Safety Follow Up	Event 1 Event 1	
✓ Location First Name Abel Amy Amy Andrew Ann Bandi Ben Brian Candi Cassandra Crystal	Last N Penunuri Jay Reicher Faust Larson Neal Lin Chen Stolpe Poorman Ramos	Employee ID U. 8250, Simulator U. 8306, Simulator U. 8349, Simulator U. 8224, Simulator U. 8222, Simulator U. 8232, Simulator U. 7002, Simulator U. 8239, Simulator U. 8256, Simulator U. 8256, Simulator	Location Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building	Team 3 Team 1 Team 3 Team 1 Team 1 Team 1 Team 1 Team 1 Team 1 Team 3 Team 3	Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto	First Direct National Bank. First Direct National Bank First Direct National Bank	Health & Safety Follow Up Health & Safety Follow Up	HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005	Health & Safety Follow Up Health & Safety Follow Up	Event 1 Event 1	it Sta
First Name Abel Amy Amy Andrew Ann Bandi Ben Brian Candi Casandra Crystal Debra	Last N Penunuri Jay Reicher Faust Larson Neal Lin Chen Stolpe Poorman Ramos Proctor	Employee ID U_8250_Simulator U_8306_Simulator U_8349_Simulator U_7004_Simulator U_8224_Simulator U_8222_Simulator U_8222_Simulator U_8329_Simulator U_83258_Simulator U_8255_Simulator U_8255_Simulator	Location Modesto Building Modesto Building	Team 3 Team 1 Team 3 Team 1 Team 1 Team 1 Team 1 Team 1 Team 1 Team 3 Team 3 Team 3	Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto	First Direct National Bank. First Direct National Bank First Direct National Bank	Health & Safety Follow Up Health & Safety Follow Up	HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005	Health & Safety Follow Up Health & Safety Follow Up	Event 1 Event 1	

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.

÷ s[🖻 Health & Safety Follow Up / Event 1 - [Schedule Event]	
Eile 1	c Event 1	
Main M	Duration (h/tmm) 01:00 💭 Duration includes Lunch Break Repeat Days 1 🐑 Min. Group Size 4 🐑 Max. Group Size 10 🐑	Save Event
	Training Time Slots Resources Optimised Manual	Interruptable Activities
•	Optimisation Algorithm Template Mon - Fri 09 00 - 19:00 & Sat / ! From To Enable Time & Travel Constraints Mon 08:00 19:00 Image: State of the second se	Activity Customer Care Email
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<u>्रि</u> Pi So + F	Completion Status	
	Lompletion Status	<u></u> K

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

OR

Select the agents in the 'User Selection' tab and then right click on the individual training sessions as per the example below.



Manually select the users from the right hand window and click on '<Add'. This will assign the user into 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 by deleting the training sessions and rerunning the schedules again with the users as part of the equation, is what we would recommend.

It is possible to amend the training session end time if required using the up and down keys. After selecting OK, Genesys Training Manager will check that there are no clashes with the Trainer, Room or if the Agent schedules still fit within the training session times. If the time is extended then the Coverage Tolerance will not be taken into account due to the change being manual.

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	Training Time Slots		able Activities
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€ • F	Completion Status.		

Committing Training Activity into Genesys WFM

The training needs to be committed into Genesys WFM, to view the impact. Highlight the training sessions and this can be done in bulk or individually by highlighting one session and then right clicking and selecting 'Genesys WFM', or use the select all button.

After selecting 'Genesys WFM' the available options are:

💥 Delete...

- 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 select either 'Delete' or select all and then click on

Training Plan 1 > Event 1 - [Schedule Eve			
Event 1			
Duration hh:mm) 00:30 🚍 🗆 Duration in	cludes Lunch Break Repeat Days	1 Min. Group Size 1 Max. Group Size 10	📕 Save Event
Training Time Slots			Interruptable Activities
Resources Optimised Manual			Modesto 🗸
Optimised Search Algorithm Template		Training Window	Activity
Monday · Friday 07:00 · 19:00 V	From To Enable	9 Jun 2010 to 9 Jul 2010	 ✓ Customer Care ✓ Email
	Tue 07:00 🚔 19:00 🚔 🗹	Start Date Time End Date Time	New Accounts
Transition Time (mins) 0 💭	Wed 07:00 🐑 19:00 🐑 🗹	10 Jun 2010 07:00 10 Jun 2010 19:00 🗐	Activity Set
Min. Activity Gap Before (mins) 🛛 🔵 💭	Thu 07:00 😭 19:00 😭 🗹	11 Jun 2010 07:00 11 Jun 2010 19:00 12 Jun 2010 07:00 12 Jun 2010 19:00	
Min. Activity Gap After (mins) 🛛 🛛 🌧		13 Jun 2010 07:00 13 Jun 2010 19:00	E-mail
Trainer Travel		14 Jun 2010 07:00 14 Jun 2010 19:00 15 Jun 2010 07:00 15 Jun 2010 19:00	Meals
- Performance Constrainte	Sat 07:00 📚 19:00 📚 🔲 Sun 07:00 📚 19:00 📚 🔲	16Jun 2010 07:00 16Jun 2010 19:00 17.Jun 2010 07:00 17.Jun 2010 19:00	🔲 36-Min Meal
Coverage Tolerance (people) .50 🔿		Build Dates Exclude Search =>	Meal
Maximum Islam Uttline 🕼 🔰 100 📥 💡	Booking Strategy Randomly Distribute (Maximise Grou 🔽	Retrieve fresh data from Genesys WFM 🔽	Breaks
			🔲 Break 1
🔜 Select All 💥 Delete 🔗 Refresh 🚽 Export	Use to select all o	of the	Break 2
Exceptions Legend :			
🗐 OK 🛛 Some/All Missing	training sessions		
Master Schedule (9) Scenarios (0)			
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Training Plan 1 > Event 1	nanoj 🥁		
	(blane)	10 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	
■ 9 Jun 2010 07:00 9 Genesys WFM	Publish	10 0 0 Crystal Ramos 10 0 0 Abel Penunuri 💙	
Contraction doi: 40 0 00000000000000000000000000000000			
9 Item(s)			<
Conclution Obstan			
Completion Status			<u> </u>

Selecting 'Publish' Genesys Training Manager will then start to commit the training into Genesys WFM after advising that publishing the training sessions into WFM may take a few minutes.



The flags will turn green to confirm the training exceptions have been committed into Genesys WFM.

Export All 🔀 Delete 🔗 Refresh 🔒 Export												
Exceptions Legend :												
Master Schedule (9) Scenarios (0)												
📆 Start Date 🛛 End Date	- 剩 Room Max. Seat:	🛛 🙆 Trainer 🙆	Employee ID # Use	ers # Attended	# Completed	💍 Name(: 🔼						
Training Plan 1 > Event 1												
9 Jun 2010 07:00 9 Jun 2010 07:30	<none></none>	<none></none>	10	0	0	Crystal Ramos						
📲 9 Jun 2010 08:45 9 Jun 2010 09:15	<none></none>	<none></none>	10	0	0	Abel Penunuri 🚩						
						>						

In Genesys WFM select 'Get Data' to refresh Genesys WFM with the new exceptions.

Genesys WFM Intra Day Schedule will now include the training exceptions in WFM within the Schedule or Scenario selected in the resources tab. Genesys 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.



Cancelling a Training Session(s)

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

To cancel a training session and remove the exceptions from Genesys WFM, highlight the training

session to be cancelled and then right click and select Delete or use the KDelete... button.



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

The exceptions will be removed from Genesys WFM after refreshing the data.
Cancelling a Training Session for an Individual

A training session can be cancelled for an individual by first expanding the training session, right click on the session and then select '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.

 Training Manager - 2× Eile ⊻iew <u>T</u>raining <u>H</u>elp Main Menu Start Site Selection User Selection Training Plans Training Events Training Sessions Training Manager
 Training Requests
 Meetings
 For Resources
 Scheduler
 User Exclusions
 User Exclusions Wiew all Training Sessions for all Training Events and status of Exceptions in Workforce Management. 🗧 🗔 Select All 💢 Delete... 🔗 Refresh 🛃 Export Exceptions Legend : 💐 OK 🛛 🧧 Some/All Missing 🗄 🦢 Training Manager Portal Master Schedule (9) Scenarios (0) WFM
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 ○ Configuration 🛗 Start Date 🛛 End Date | 剩 Room| Max. Seats| 🙇 Trainer| 🚑 Employee ID| # Users| # Attended| # Completed| 🤷 Name(s) Training Plan 1 > Event 1 Training Session Details... Crystal Ramos, Eduardo Garcia, <None> 10 Π 0 Cassandra Poorman, Celeste Mu Amy Reicher, Candi Stolpe, Dick <None 10 0 <None> 0 ■ 17 ■ 17 ■ 24 WEM . e> <None> 10 n n Abel Penunuri, Ann Larson, Jenr Ian Johnson, Nancy Nelson, Reg <None> 5 Attendance. 0 0 <None> 10 n n John O'Reilly, Kathy Gurin, Misti 24 🗙 Delete.. <None> 10 Debra Proctor, Elenison Olson, E 0 0 Sub Menu 1:45 Jun 2010 11:15 25 Jun 2010 11:45 (None) <None> 9 0 0 Amy Jay, Bandi Neal, Fertisha Ra 📫 28 Jun 2010 17:15 28 Jun 2010 17:45 <None> Ō Robert Patrick <None> 0 New Product Launch (e-learning) < > 9 Item(s) -0 Completed -0 Rejected < Previous Next > Apply 🔅 Preferences 👻

The training session can also be selected under the 'Training Plans' tab.

Ones the agent details are visible in the 'Training Session Details' window users can be manually removed by highlighting the individual and selecting Remove. This will remove the user and put them in the right hand 'Not in Training Session' window.

Training Sess	sion							_	
Details									
Event	Event 1		Roor	n	Modesto Ro	om 1			
Training Plan	Health & Sa	fety Follow Up	 Train	er	David Willian	ns			
Start Date	19 Jan 201	0 💌 09:30 🛬	Endl	Date	19 Jan 201	0 💌 10:30 🖁	A Y		
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Columns						Columns			
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First Name	Last Nar	Employee ID	Loca		< Export	First Name	Last N	Employee ID	
🗐 Diana	Olson l	J_8241_Simulator Mod	esto Bu		< export	🐣 Abel	Penunuri	U_8250_Simulator	Mc
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						📇 Guadalupe	Perepelkin	U_8251_Simulator	Mc
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Z Delete		Commit aut	omatically to Genesy	s WFM 🗹 🚺	<u>0</u> K <u>C</u> ar	ncel

The agent will then show i	n the Completion S	Status Report as unscheduled.
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-Training Session F	Filters										
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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.

Scheduling Mop Ups

Agents can be scheduled as part of the original schedule using the 'Mop Up' process and 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 in 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. This can be accessed through the 'Training Plan' tab, select the 'Event' and then 'Schedule'.

🥃 Training Manager	
<u>Fi</u> le <u>V</u> iew <u>Training</u> <u>H</u> elp	
Main Menu Training Request Training Request Resources Date Exclusions Date Exclusions Date Sculutions Date Scu	Statt Site Selection User Setection Training Plans Training Sessions
Sub Menu Training Requests 1 Apr 2003 - 2 Oct 2010 Pending Approval Pending Approval Blackberry Retraining Blackberry Retraining New Horbuct Launch New Horbie Upgrades New Product Launch (elearning) New Trid Launch New Trid Launch N	Training Category
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Or through the 'Training Events' tab and right click on the 'Event' and then 'Schedule Event...'

Overall Completion : 0.0%	s of this Training in the Masl	# Users Scheduled	71
	40 60	# Users Unscheduled	9
	20 % 80	#Users Trained in all Events	0
	 100-	# Users Untrained / Partially Trained	71
event Name # Scheduled #	Jnscheduled # Trained #	Untrained % Complete	
Training Plan 1			
Event 1 71 9	0 71	0.0%	
📰 Schedule Event			
Completion Statu	5		

This will then present the 'Scheduler' with the original constraints and training schedules, see the example on the next page.

To re run the' Scheduler', select' Search' and the 'Scheduler' will schedule any unscheduled agents in to further training sessions, taking the original constraints into account.



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

In the example below Debra Proctor has been scheduled in for training and the red flag identifies that some or all of the training session are missing in the Master Schedule.

Status Filter						
Enable Stat	us Filter					
		🔽 💈 Refresh				
Training Session	Filter					
🔲 Enable Date	e Filter					
Start Date		ng 🔽 End (Data Lucia Lincola			
Stalt Date	02 Feb 20	09 🔀 Endl	Date 16 Feb 2009	<u>×</u>		
First Name	Last N	Employee ID	Start Date	End Date	Status	Traine
Abel	Penunuri	U_8250_Simulator	9 Dec 2008 11:15	9 Dec 2008 13:15	Scheduled	
Amy	Jay	U_8306_Simulator	5 Dec 2008 11:45	5 Dec 2008 13:45	Scheduled	
Amy	Reicher	U_8349_Simulator	12 Dec 2008 11:45	12 Dec 2008 13:45	Scheduled	
Andrew	Faust	U_7004_Simulator			Unscheduled	
🖓 Ann	Larson	U_8224_Simulator	16 Dec 2008 11:30	16 Dec 2008 13:30	Scheduled	
🖣 Bandi	Neal	U_8232_Simulator	8 Dec 2008 11:15	8 Dec 2008 13:15	Scheduled	
Ben	Lin	U_8227_Simulator			Unscheduled	
Brian	Chen	U_7002_Simulator			Unscheduled	
🐖 Candi	Stolpe	U_8329_Simulator	3 Dec 2008 11:30	3 Dec 2008 13:30	Scheduled	
🖣 Cassandra 👘	Poorman	U_8258_Simulator	5 Dec 2008 11:45	5 Dec 2008 13:45	Scheduled	
🖣 Celeste	Mumphrey	U_8230_Simulator	12 Dec 2008 10:15	12 Dec 2008 12:15	Scheduled	
👎 Crystal	Ramos	U_8265_Simulator	8 Dec 2008 11:15	8 Dec 2008 13:15	Scheduled	
👎 Debra	Proctor	▶8262_Simulator	16 Dec 2008 13:30	16 Dec 2008 15:30	Scheduled	
👎 Diana	Olson	U_8241_Simulator	5 Dec 2008 11:45	5 Dec 2008 13:45	Scheduled	
👎 Dick	Clarkson	U_8353_Simulator	15 Dec 2008 10:30	15 Dec 2008 12:30	Scheduled	
👎 Eduardo	Garcia	EGarcia	16 Dec 2008 11:30	16 Dec 2008 13:30	Scheduled	
👎 Elenison	Olson	U_8242_Simulator	3 Dec 2008 14:00	3 Dec 2008 16:00	Scheduled	
🖣 Enej	Pelletier	U_8249_Simulator	11 Dec 2008 13:00	11 Dec 2008 15:00	Scheduled	
🖷 Fertisha	Ramero	U_8285_Simulator	4 Dec 2008 13:15	4 Dec 2008 15:15	Scheduled	
		U_8251_Simulator	5 Dec 2008 09:30	5 Dec 2008 11:30	Scheduled	1

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

Event 1 Duration (hh:mm) 01:00 🗭 🗖 🛛	Duration includes Lunch E	treak Repeat Days	1 🥏 Min. Group S	ize 1 🌒 Max. Group :	Size 5 💭 📄 Save Eve
Training Time Slots Resources Optimised Manual					Interruptable Activities
Time & Travel Constraints Transition Time (minutes) Trainer Travel	From Mon 07:00 Tue 07:00 Wed 07:00 Thu 07:00 Fri 07:00	19:00 ♀ ✓ 19:00 ♀ ✓ 19:00 ♀ ✓ 19:00 ♀ ✓	19 Jun 2009 07:00 1 22 Jun 2009 07:00 2 23 Jun 2009 07:00 2 24 Jun 2009 07:00 2 25 Jun 2009 07:00 2 26 Jun 2009 07:00 2	29 Jun 2009 End Date Time 9 Jun 2009 19:00 2 Jun 2009 19:00 3 Jun 2009 19:00 4 Jun 2009 19:00 5 Jun 2009 19:00 6 Jun 2009 19:00 6 Jun 2009 19:00 9 Jun 2009 19:00	Activity Customer Care Email New Accounts Activity Set E-mail Meals
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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, see the example below. To hot swap a Room or a Trainer click on the icon at the right hand side of the Room or Trainer and the tree view with the Trainer and Room details by Location is then presented; see the example on the next

page.

🗷 Training Plan	1 / Event 1 - [S	chedule Event]						
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		Duration includes Lunch Break	nepeat Days	1 🌲	Min. dioup Size	1 💽 Max. Group Size	5 🗢	🚽 Save Event
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Resources 0	Details		_			()		<u> </u>
Optimisation	Event	Event 1	_	B&E Warring	iton 2	<u> </u>		
Week da	Training Plan	Training Plan 1	Trainer	Gavin Byrne				are
⊂ Time &	Start Date	19 Jun 2009 10:45	End Date	19 Jun 2009	11-45	$\overline{}$		unts
Transitio		1330H2003 10.43		13 Jun 2003	11.40			ants
	In Training Sessi	on - * Bold = Not Saved			Not In Training Session			
		Last Name Employee ID		< Export			~	
Perform		Penunuri U_8250_Simulator			First Name Last N.		^	
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Maximur		Patterson U_8248_Simulator			📇 Crystal 🛛 Ramos	n U_8265_Simulator U_8265_Simulator		
	🖷 Stacy 🛛 F	Resner U_8269_Simulator			📥 Debra Proctor	U_8262_Simulator		
🕐 Define					🐣 Fertisha 🛛 Ramero 🖧 Guadalupe Perepel			
- Training Sessio				Add	📇 Helena 🛛 Peters	U_8254_Simulator		
🔅 🇔 Select All				move >	🐣 Jennifer Rand 🐣 Jennifer Rhoade	U_8266_Simulator s U 8270 Simulator		
😁 Start Da					📇 Jessica Peterso			
🥰 19 Jun 200					📇 La Tasha 🛛 Porras	U_8259_Simulator		
🥰 19 Jun 200:					🐣 Linda Perez 🐣 Linda Rhodes	U_8252_Simulator U_8271_Simulator		
🗳 19 Jun 200					🐣 Lydia 🛛 🛛 Ramirez	U_8264_Simulator		
🥰 19 Jun 200:					🐣 Megan Powell I 🐣 Misti Pivero	II U_8260_Simulator U_8257_Simulator		
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		III						
Completion Sta	tus							

In the example below 'Room' has been selected and the option to choose a different room is presented.

Event Details Duration (Hhrma) Training Session Periadic Session Optimisation Alc Veriation Time State Optimisation Alc Training Time State Optimisation Alc Training Time State Veriation Time Training Session Baild Date Optimisation Alc Fit Anne Last N State Date Optimisation Time Fit Anne Training Session Baild Date Optimisation Time Period Training Session Baild Date Packed Session State Date Optimisation Time Period Training Session Baild Date Packed Session	🖬 Scheduler							
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Completion Status	Completion Statu	18						

After selecting an alternative room, click on 'OK'.

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 to allow them to select another room, see 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.



Using Scenarios for 'What If' Scheduling

When using Scenarios to view the impact of the training before committing it into Genesys WFM, the process is exactly the same up to the 'Resources' tab. In the 'Workforce Schedule' select the required Scenario from the list of available Scenarios in WFM. In this example multiple Scenarios have been selected to cover the training window.

Note: It is important to remember that the Scenario selected MUST match the date range in the training window. If the Scenario does not match Genesys Training Manager will use the Master Schedule to schedule against.

🛎 Training Manage 🔁 Training Plan 1 > Event 1 - [Schedule Event]	X	
]
Main Menu		
Training Manager Duration (hh.mm) 00:30 💭 🗋 Duration includes Lunch Break Repeat Days 1 🐑 Min. Group Size 1 🐑 Max. Group Size 10	🔛 Save Event	
Training Req Training Time Slots	Interruptable Activities	-
B Resources Resources Dotimised Manual	Modesto	
G Scheduler	Activity	
Date Exc Workforce Schedule : Master Schedule Master Schedule		
🕀 🥁 Training Manager 🛛 🚊 🖁 Resources	Customer Care	
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⊕ a Cardifi	Meals	
B Doncaster	36-Min Meal	
(2) Choose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver this Training.	Meal	
Sub Menu	Breaks	
In Training Request Exceptions Legend:	Ereak 1	
Comparing Apple and a starting	Break 2	
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- 💏 New Mot 📅 Start Date End Date 🕺 Room Max. Seats 🙈 Trainer 🙇 Employee ID # Users # Attended # Completed 📇 Name(s) 🧕 Excep		
- 🍓 New Proc		
New Taril		
🟵 🚺 Rejected		
Preferences • 0 Item(s)	<	ply <u>Close</u>
≥ + Ready Completing Status		t 2010 20:31

After selecting the Scenario, continue as normal selecting 'Search' once all of the information has been entered.

Once the schedule has been completed the suggested training sessions will be displayed in the 'Training Sessions' window. By default Genesys Training Manager always displays the Master Schedule tab and to view any training sessions using a Scenario click on the Scenario tab, otherwise there will be nothing visible.



Scenario tab



The Completion Status Report can be viewed at this stage to see how successful Genesys Training Manager has been in scheduling any training sessions.

😸 Training Manage	📧 Training Pla	n 1 > Event 1 - [Sc	hedule Eve	nt]								
Ele View Training He		Training Plan 1	> Event 1	- ICompletion Sta	atus]							
Main Menu	Event 1	Master Schedule	<u> </u>	L							1	
🖃 🛬 Training Manager	Duration (hh:r	<u> </u>									าตา	
🗉 🔲 Training Requ		Statistics for this Eve	nt		# Scheduled							ļ
- Meetings	Training Time \$		0	Il Scheduled				75			tivities	
🕀 📲 Resources	Resources C	40,60 80	$\mathbf{\lambda}$		# Unscheduled			5			~	
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🗉 🥪 Training Manager	Monday -										are	
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	Min. Acl											
	Min. Acl	Start Date	25 Jul 2010	End Date	08 Aug 2010	~						
		Enable Status F	ilter									
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	Perform			🐉 Refresh								
											91	
	Coveraç	Columns										
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😑 🔲 Training Request:	Select All	Location]Team 🔽	Site 🔽 Business	Unit							
- 🚱 1 Apr 2009 - 2	Exceptions											
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Preferences 🔹	9 Item(s)	80 Item(s)										
i r Ready	Canalatian										01	t 2010 20:44

In this example it clearly identifies that the results are for the Scenario.

To publish the training sessions into the Genesys Scenario select the training sessions and then right click for 'Genesys WFM' and then 'Publish'

Once the training sessions have been published the flags at the left hand side of the training sessions will change color.

Note: Committing to Genesys WFM in the Scenario tab will only commit to the Genesys Scenario.

Search Training Manage	Training Plan 1 > Event 1 - [Schedule Event]	
Ele View Training He	Training Pian 1 × Event 1 - [Scheuder Event]	
Main Menu	Event 1	
🖃 🦢 Training Manager 🕀 🔲 Training Requ	Duration (hhrmm) 00:30 🐑 🗋 Duration includes Lunch Break Repeat Days 1 🐑 Min. Group Size 1 🐑 Max. Group Size 10 🐑	Save Event
Meetings	Training Time Slots	Interruptable Activities
Besources Scheduler	Resources Optimised Manual	Modesto 🗸
Date Exc	Optimised Search Algorithm Template Training Window	Activity
🕀 🧺 Training Manager		Customer Care
⊕-	Time & Travel Constraints Mon 07:00 💭 19:00 💭 🔽 Start Date Time End Date Time	Email New Accounts
Configuration	Transition Time (mins) 0 💭 Tue 07:00 🐑 19:00 💭 🕑 9 Jun 2010 07:00 9 Jun 2010 19:00	E. HOT DOOMING
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	Trainer Travel	Meals
	Sat 07:00 😴 19:00 😴 🗌	Meals
	Performance Constraints Sun 07:00 19:00 Build Dates Exclude Search →	36-Min Meal
	Coverage Tolerance (people) 50 💭 Retrieve fresh data from WFM 🔽	Meal
Sub Menu	Select All 🗶 Delete 🖉 Refresh 📕 Export	Breaks
Training Request — 6 1 Apr 2009 · 2	Exceptions Legend :	Break 1
🕀 🍈 Pending Appr	Exceptions Legend . 🕼 OK (and Master) 🥑 OK (Some/All Missing in Master) 🥵 Some/All Missing (and Master) 🥥 Some/All Missing (Master OK)	Break 2
😑 🕕 Active		
- 🧐 Blackberr - 🧖 New iPho	Master Schedule (0) Scenarios (9)	
- 🍓 New Mot	🛗 Start Date End Date Scenario 🛃 Room Max. Seats 🐣 Trainer 🐣 Employee ID # Users # Attended # Comple	
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Reserving	WFM + Publish (None> 10 0 0	
E O Completed	Vone> 10 0 0	
🗄 🕕 Rejected		
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Preferences +	9 Item(s)	
'‱ + Ready	Completion Status	OK t 2010 20:45

Once the training sessions have been published to the Scenario, there is an option to remove the training sessions without deleting them by selecting 'Remove'.

To copy the training sessions across to the Genesys Training Manager Master Schedule for publishing into the Genesys WFM Master Schedule again select the training sessions and then 'Copy to Master Schedule'.



The training sessions will then be visible in the Master Schedule tab only after clicking on the tab.

😸 Training Manage	🗉 Training Plan 1 > Event 1 - [Schedule Event]	
Elle View Training He	e Event 1	
Main Menu	Duration (hhrmm) 🔟 30 🛋 🗋 Duration includes Lunch Break Repeat Days 1 😓 Min. Group Size 1 🖨 Max. Group Size 10 🖨 📓 Save Event	
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User Excl	Monday - Friday 07:00 - 19:00 Image: Second sec	
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	Sat 07:00 (Image) 13:00 (Image) Build Dates Exclude Search (Image) Coverage Tolerance (people) -50 (Image) -50 (Image) -50 (Image) -60 (Image)	
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- Wew iPhc - Mew Mot - Mew Proc - Mew Proc - Mew Taril	Training Plan 1 > Event 1	
e (1) Completed ⊕ (1) Rejected ⊕ (1) Rejected	Image: Solution 2010 07:00 9.Jun 2010 07:00 9.Jun 2010 07:00 9.Jun 2010 07:00 9.Jun 2010 07:00 0 C.getal Ramos Image: Solution 2010 07:00 0.Jun 2010 07:00 0.Vone> 10 0 0 Celeste Mump Image: Solution 2010 07:00 Vone> 10 0 0 Celeste Mump Image: Solution 2010 17:15 11.Jun 2010 13:45 None> None> 10 0 Ann Larson, B	
🗄 🏟 Preferences 👻	9 Item(s)	> by <u>C</u> lose
≽ ▼ Ready	Completion Status	OK t 2010 20:47

To commit the training session into Genesys WFM Master Schedule select the training sessions and then right click 'Genesys WFM' and then 'Publish'.

The same option is available to remove the training sessions in Genesys WFM without deleting them by selecting 'Genesys WFM' and then 'Remove'.



Once the training session have been committed into the Genesys Training Manager / Genesys Master Schedule to continue scheduling using the Scenario the training sessions MUST be deleted in the Master Schedules. Therefore select the Master Schedule training sessions and then' Delete'. To continue using the Training Request directly with the Master Schedule in Genesys WFM then the Scenario MUST be changed to the Master Schedule in the 'Resources' tab.



🔅 Preferences 👻

Read

9 Item(s)

<u>C</u>lose

t 2010 20:53

>

AND delete any training session in Scenario tab.



Manual Scheduling

This option is available in Genesys Training Manager however we see the usage being very limited if at all and would recommend that the 'Optimization Algorithm Template' be used.

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.

🔄 Training Plan 1 / Event 1 - [Schedule Event]	
CEvent 1	
Duration (hh:mm) 01:00 💭 Duration includes Lunch Break Repeat Days 1 💭 Min. Group Size 1 💭 Max. Group Size	5 Save Event
Training Time Slots	Interruptable Activities
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Site Modesto	✓ Customer Care
Start Time End # Users	V New Accounts
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	🔲 36-Min Meal
Search ⇒	
Pind slots manually for Training delivery.	Breaks
Training Sessions	Break 1 Break 2
Select All 🗙 Delete 🖉 Refresh 🚽 Export	
🛗 Start Date End Date Schedule/Scenario 🕺 Room 🐣 Trainer # Users # Attended # Completed 🔬 Exception	
Completion Status	<u></u> K
Ready	.;;

Select 'Manual' from the tabs available and the 'Training Time Slots' window will change as per the example below.



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 and this can be amended if required.

In the 'Interruptible Activities' window the activities still need to be selected that the application can schedule training into and in the 'Performance Data' window the' Site' or 'Scheduling Pot' needs to be selected.

The date to search for users who fit the training criteria needs to be specified from the calendar pull down box and then select 'Search'.

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

By highlighting one of the time slots and selecting 'More' this will provide the performance data for that time slot.

As each training time slot has associated performance data this allows the Administrator to view each time slot before making an informed decision when to schedule training.



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





📧 Training Sessi	ion						
_ Details]
Event:	New Product Launch		Room:	B&	E Warrington 2		A
Training Plan:	New Product Launch		Trainer:	Aly	son Bushel		
Start Date:	2 Dec 2008 02:00		End Date:	20	ec 2008 03:00		
In Training Sessi	on - * Bold = Not Saved				Not In Training Sess	ion	
First Name Last	Name Employee ID				First Name	Last N	Employee ID 📃 📐
Arrow Kim Lew Linda Pere Lydia Ram Lydia Ram Lynne Suz Sherry Lynn	ez U_8252_Simula hirez U_8264_Simula anne U_8304_Simula	tor tor tor tor	<pre>< Add Remove > ompleted, DK</pre>		 Abel Amy Amy Andrew Ann Bandi Ben Brian Candi Cassandra Celeste Crystal Debra Diana Diana Dick Eduardo Elenison Fertisha 	Penunuri Jay Reicher Faust Larson Neal Lin Chen Stolpe Poorman Mumphrey Ramos Proctor Olson Clarkson Garcia Olson Ramero	U_8250_Simulator U_8306_Simulator U_8349_Simulator U_7004_Simulator U_8224_Simulator U_8223_Simulator U_8227_Simulator U_8227_Simulator U_8329_Simulator U_8258_Simulator U_8265_Simulator U_8262_Simulator U_8253_Simulator U_8253_Simulator U_82541_Simulator U_8253_Simulator U_82541_Simulator U_82542_Simulator U_8285_Simulator U_8285_Simulator U_8285_Simulator U_8285_Simulator U_8285_Simulator U_8285_Simulator
			Commit a	utom	atically to Genesys 7	.5 🔽 📃	<u>C</u> ancel

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



The created training session will then be visible in the 'Training Session' window.

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

Deleting a Training Request

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

🤘 Training Manager			_ 7 🗙
Eile View Iraining Help			
Main Menu B-Sey Training Manager	Start Site Selection User	Selection Training Plans Training Events Training Sessions	
Training Manager Training Requests Meetings	Enter various descriptive	e and key information about this Training.	
⊕	Main Title & Reference	Blackberry Retraining BBRT001	
Date Exclusions	Training Category	GBT/e-Learning	
⊕ '∋ Training Manager Portal ⊕ '∋ WFM ⊕ ∰ Configuration	Description & Objectives	Supporting training based on skill gaps identified	
	Business Sponsors		
	Stakeholders		
Sub Menu	Additional Notes	This training is required across all areas impacted by the scheduled marketing activity	
Training Requests - -	Status	Active	
Nex Delete Training Request	Training Manager Portal	Also displayed on the Training Roadmap	
New Mobils Upgrades	Dates		
- 🍓 New Tariff Launch	Window Start Date	09 Jun 2010	
Reserving Rooms & Training	Window End Date	09 Jul 2010	
⊕ (i) Rejected	- Update Information		
i 🌐 Preferences 👻			< Previous Next > Apply Close

Create Meetings

To create a meeting, select 'Meetings' from the Main Menu and it is the same process for creating Team Meetings, Team Huddles & One to Ones.

😸 Training Manager	
Eile View Iraining Help	
Main Menu	
Training Manager Trai	
Sub Menu	
Aberdeen Ahess Bangor Banow Blackburn Brentwood Carterbury Cardiff Doncester Dubin Dubin Dubin Dundee	
Preferences -	
We meneralizes *	

In the Sub Menu a list of the locations will appear. The view can be changed to show the Genesys WFM database by right clicking on 'Meetings' in the Sub Menu.

The view will change in the Sub Menu to present the WFM database as per the example on the next page.

😸 Training Manager	
Ele View Iraining Help	
Main Menu	
Main Menu	
Sub Meru Sub Meru A View by KPM database Barow Blackburn Blackburn Blackburn Carterbury Cardifi Doncaster Dudee Emiskillen W	
🔅 Preferences 👻	

Expand the Genesys sites to reveal the associated teams in WFM.

🤘 Training Manager	
Eile View Iraining Help	
Main Menu	
Iraining Manager Training Manager Training Requests Training Requests Scheduler Dele Exclusions User Exclusions Wer Manager Portal WFM Se Configuration	
Sub Menu	
Image: Meetings Image: With Direct National Bank Image: With Direct Na	
Preferences 👻	

After clicking on one of the teams 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.

Click on 'New Meeting' to reveal the step by step meeting template (as per the example on the next page).

😸 Training Manager													_ 8 🗙
Eile Yiew Iraining Help													
Main Menu	r Meeting Filters												
Training Manager Training Manager Training Requests Defetings Date Exclusions User Exclusions VFM WFM WFM	Enable Status Filter Enable Type Filter Show items needing critical attention Show items needing attention soon D Show items needing attention Show items needing no attention												
_	Only show items without Next Dates												
	🕴 🎦 New Meeting 🗔 Select All 💢 Delete 🖉 Refresh 🎡 Next Dates 📰 Optimised Searches												
	Status	Main Title	Туре	Status	📸 Tea	m Start Date	End Date	Next Start Date	Next End Date	Duration (Minutes)	Recurrence	Information	
Sub Menu © 11 Meetings													
WPM WPM Modesto Modesto Remo Remo Remo Remo Remo Remo Remo Re													
Preferences +	0 Item(s)												Export

Clicking on 'New Meeting' presents the step by step meeting template 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.
- Meeting Type Select the relevant 'Meeting Type' from a drop down box. There are 3 options Team Meeting, Team Huddle & One to One to select from (Team Meeting & Team Huddles would be selected for group meetings).
- 3. Description & Objectives enter any relevant information about the meeting as this will also be visible in the web portal against the meeting.
- 4. Status There are 3 options:
 - a. Pending Approval is used for testing purposes where the schedules are not yet confirmed to appear in any web portal views.
 - b. Active is used once schedules are confirmed and are required to be visible in web portal views.
 - c. Inactive is used so that the meetings no longer appear as active.

😸 Training Manager	
Eile View Iraining Help	
Main Menu	lection Meeting Scheduler Workforce Management
Training Requests	ous descriptive and key information about this Meeting.
🕀 🦹 🖁 Resources Main Title	<new meeting=""></new>
Exclusions Meeting Type	2
—	
😟 🥪 WFM	
ii 🛞 Configuration	3
Status	() Pending Approval
Dates	
Start Date	01 Aug 2010 V End Date 01 Aug 2010 V
Earliest S	
Sub Menu Duration	
Meetings	hr.mm) 01:00
ia → WFM ia A First Direct National Bank CAttendance	
E- E Modesto	
Team 1 Minimum	ercentage of Attendoes Required 100 🔿
🖓 Team 3	
iæ- 🗐 Reston ⊛- 🗐 Cincinnati	
	< Previous Next> Apply Cancel
Preferences -	
	/
/	
/	
Start User Selection Meeting Scheduler Workforce Management	Start User Selection Meeting Scheduler Workforce Management
@ Enter various descriptive and key information about this Meeting.	e Enter various descriptive and key information about this Meeting.
Main Title Team 1 Monthly Meeting	Main Title Team Monthly Meeting
Meeting Type	Meeting Type
Team Meeting	
Description & Objectives	
Status 🚺 Pending Approval 🖌	Status 🚺 Pending Approval
	Pending Approval Active
Dates	Dates
Start Date 24 May 2010 M End Date 24 May 2	
Earliest Start Time 08:00 🐑 🔟 Latest End Time 18:00	Earliest Start Time 08:00 🕞 Latest End Time 18:00
Duration (hh:mm) 01:00	Duration (hhr.mm)
Attendance Requirements	
	C Attendance Requirements
Minimum Percentage of Attendees Required 20 蒙	Minimum Percentage of Attendees Required 20 🗇
Update Information	Update Information
Created Monday, 24 May 2010 by Genesys/WFM\demo	Created Monday, 24 May 2010 by GenesysWFM\demo
Last Updated Monday, 24 May 2010 by Genesys/WFM\demo	Last Updated Monday, 24 May 2010 by Genesys/WFM \demo

- 5. Start Date by default the meeting window will be the current date
- 6. End Date the end date can be selected by using the drop down box or by clicking on

which then presents three options to select from. Click on any of the options and Genesys Training Manager will automatically populate the end date.

- 7. Enter the earliest start and latest end time that the meeting can happen.
- 8. Enter the meeting duration.

>

9. Enter the 'Minimum Percentage of Attendance Required'; this is the minimum percentage of team members that the meeting planner can schedule for the meeting to occur.

😸 Training Manager		_ 7 🛛
Eile View Iraining Help		
Control of the second sec	Stat User Selection Meeting Scheduler Workforce Management Image: Selection of the	
Sub Menu Sub Metings Sub WrM Sub First Direct National Bank 7	Status Pates Statu Date U1 Aug 2010 End Date Duration UH film Duration UH film Catlendance Requirements Catlendance Requirements	6. Select the date from a drop down
Cincinnati	9. The m member	ninimum % of team rs that the meeting scheduled for.

Once the 'Start' template has been completed, selected either 'Next' or the 'User Selection' tab.

In the 'User Selection' tab select the team that the meeting is being created for.

In this example Team 1 has been selected.

🤘 Training Manager		
Eile ⊻iew Iraining Help		
Lie geer graining Leger Main Meru Training Manager Training Requests Training Restricts Training Anager Portal Training Manager Portal Training Manager Portal Training Manager Portal Training Manager Portal	Stat Uter Selection Meeting Scheduler Workforce Management. Image: Construct State	
Sub Menu Sub Meu Metings Metings Modesto Modesto Rean 1 Rean 1 Rean 3 Cincinnati Cincinnati	25 Selected Cles	0058
Preferences -	< <u>Previous</u> <u>Next</u> Appy <u>L</u> k	126

Once the relevant team has been selected, click on 'Next' or select the 'Meeting Scheduler' tab.

The meeting scheduler is where the elements of the meeting are defined.

1. Recurrence – selecting 'Recurrence' identifies to Genesys Training Manager that the meeting can be scheduled as recurring and can be 'rolled forward' to create future meetings.

🤘 Training Manager		- 7 🔀		
Eile View Iraining Help				
Main Menu Training Requests Training Requests Training Manager Training Manager Training Manager Portal Training Manager Portal Configuration Sub Menu Meetings WFM	Stat: User Selection Meeting Scheduler Workforce Management Describe when this Meeting will take place, for how long, and whether it will reoccur. Interruptable Activities Interruptable Activities			
	Customer C C	ints 🗏		
	Constraints Model Model Meals Scheduling Time Constraints Mr. Activity Gap Before (mins) D Workforce Schedule: imid Administration Administration			
 	Min. Activity Gap Atter (mins) 0 Min. Activity Gap Atter (mins) 0 Booking Strategy Randomly Distribute Performance Constraints Search Coverage Tolerance (people) 0			
Preferences 👻	< <u>Previous</u> <u>Next</u> > <u>App</u>	oly <u>C</u> ancel		

After selecting 'Recurrence' the options become 'Active'.

Ø Describe when this Meeting will take place, for how long, and whether it will reoccur. Recurrence ✓ Active				
🔿 Daily 🔿 Weekly	📃 Monday 📃 Thursday	📃 Tuesday 📃 Friday	🗌 Wednesday	
Monthly	📃 Sunday			

There are three recurrence options available, Daily, Weekly & Monthly.

Daily – a recurrence pattern set to Daily will try to book a meeting on everyday that is ticked (Monday – Sunday) for every week between the Start and the End date.

Weekly – a recurrence pattern set to Weekly will try to book a meeting once a week on any of the days that are ticked between the Start and the End date.

Monthly – a recurrence pattern set to Monthly will try to book a meeting once a month on any of the days that are ticked between the Start and the End date.

After selecting the recurrence pattern, the option is then available to select a Room if this is required.
Within the 'Room Requirements' window is the option to select Rooms against the relevant locations. If Rooms are required select them by ticking the box at the left hand side.

Within the Scheduling window is the 'Time Constraints' options:

- 1. Min. Activity Gap Before (mins) this specifies the minimum amount of time that the users has to have scheduled before they are scheduled to attend a meeting.
- 2. Min. Activity Gap After (mins) this specifies the minimum amount of time that the users have to have scheduled after their meeting has been completed.
- 3. Min. Gap Between Sessions (days) this is the minimum number of days that must be in between scheduled meeting.

The 'Performance Constraints' window allows for a coverage tolerance to be entered.

The 'Workforce Schedule' (Master Schedule or Scenarios) is selected to schedule the meetings against to view the impact of the meetings in WFM

The Booking Strategy is selected with the option of Front Load, Randomly Distribute or Back Load available.

The 'Interruptible Activities' option is also available which if selected Genesys Training Manager will look at scheduling meetings over if required.

Select 'Search' to retrieve fresh data from GWFM.

🥃 Training Manager		- 2 🛛
Elle View Iraining Help		
Every graning gep Main Menu Image: Straining Manager Image: Straining Manager	Daily Monday V Tuesday Wednesday Weekly Thursday P Friday Saturday Weekly I hursday P Friday Saturday Monthly Sunday A recurrence pattern set to Monthly will try to book a meeting once a month on any of the days that are ticked between the Start Date and End Date. Room Requirements View Inactive Rooms View Inactive Rooms Aberdeen Aberdeen B&E Aberdeen 1 B&E Aberdeen 2	Interruptable Activities Modesto Customer Care Customer Care Customer Care Subscript Set E-mail Meals Schin Meal Schin Meal Activity Set Schin Meal Activity Set Schin Meal Activity Set Schin Meal Schin Meal
Preferences +		M

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

The Master 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 to WFM as per the training requests.

🤘 Training Manager		X
Eile View Iraining Help		
Le ger John J Lep Main Menu Training Manager Training Aequests Training Aequests Training Aequests Training Manager Portal Training Manager Portal Configuration	Statt User Selection Meeting Scheduler Workforce Management Image: Select All Control Status of their Exceptions in Workforce Management. Image: Select All Control Status of their Exceptions in Workforce Management. Image: Select All Control Status of their Exceptions in Workforce Management. Image: Select All Control Status of their Exceptions in Workforce Management. Image: Ima	
Sub Menu Meetings Sub Meta First Direct National Bank. Modesto Team 1 Sub Team 1 Sub Team 3 Sub Reston Sub Concinnational Bank. Sub Reston Sub Concinnational Bank. Sub Reston Sub Concinnational Bank. Sub Reston Sub Rest	(
Preferences -	<u>Previous</u> <u>Next></u> <u>Apply</u> <u>Close</u>	1

The options are also available to view the 'Meeting Session Detail...' and 'Performance Data...'as per creating training sessions.

🥃 Training Manager	
Eile View Iraining Help	
Ele Yew Training Help Main Menu Training Manager Training Requests Scheduler Training Manager Potal Training Manager Pot	Statt User Selection Meeting Scheduler Workforce Management Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Start Date Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Start Date Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Start Date Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete Image: Select All X Delete
🖮 🚍 Cincinnati	K
	1 Item(s)
Preferences -	Countries Greek State Shirth Const

In Version 2.5 the option to Commit has been changed to 'Publish...' and there is also the option to 'Remove...' the exceptions and keep the meeting sessions that have already been created rather then remove the exceptions by deleting the meeting or training requests.

🥌 Training Manager		×
Eile ⊻iew Iraining Help		
Lee geer graining Lee	Stat User Selection Meeting Schedule Workforce Management. Image: Select All Schedule Schedule Schedule Schedule Image: Schedule Schedule Manager Schedule Schedule Image: Schedule Schedule Schedule Schedule Schedule Schedule Image: Schedule Schedule Schedule Schedule	
Sub Menu Meetings WFM Feet Direct National Bank. Modesto Team 1 Feam 2 Feet Trans 3 Feet Trans 3 Feet Trans 3 Feet Trans 4 Feet Tra	WFM Publich Remove Item(s)	

Once the sessions have been committed, select 'Close' to close the meeting session template.

After closing the meeting request template the meeting session now appears in the Meetings window as per the example on the next page.

🥃 Training Manager											_ 2 🛛
Eile View Iraining Help											
Main Menu	Meeting	Filters									
Training Manager Training Manager Training Requests Scheduler Scheduler VFM WFM Schedular	⊂ En V Sh V Sh	able Status Filter able Type Filter ow items needing critical ow items needing attentic ow items needing no atte ly show items without Ne	on soon 10 ntion				ags with Recurrence				
	🕴 🎦 Nev	v Meeting 🛛 🗔 Select All	🗙 Delete	😌 Refres	ih 🛛 🎡 Next Da	tes 😨 Optimise	d Searches				
	Status	Main Title	Туре	Status	📸 Team	Start Date	End Date	Next Start Date	Next End Date	Duration (Minutes)	Recurrence
		Team 1 Team meeting				3 Aug 2010 09:00	2 Sep 2010 22:00)	30	Monthly (Mon, Tue, V
		Team 1 One to One	One To One				9 Aug 2010 22:00			30	Monthly (Mon, Tue, V
		Team 2 Team meeting					9 Aug 2010 22:00		٢	30	Monthly (Mon, Tue, V
		Team 2 One to One	One To One	Active	Team 1	10 Jul 2010 08:00	9 Aug 2010 22:00		J	30	Monthly (Mon, Tue, V
Sub Menu									-		
 ■ Meetings ● WM With ● ▲ First Direct National Bank ● ■ Modesto ● ● Team 1 ● ● Team 3 ● ■ Reston ● ● ■ Crininati 	<				101						Export
Preferences +	4 Item(s)										
. 000	+ rcoll(s)										

Copying a Scheduled Meeting to Other Teams

Once a meeting has been created it can then be copied across to other teams using the same format (this can be edited once created if required).

Right click on the meeting request and select 'Duplicate meeting to other Team(s)...' from the menu options presented.

🥃 Training Manager	
Eile View Iraining Help	
Main Menu	Meeting Filters
□ Training Manager 0 □ 1 Meetings 0 0	Enable Type Filter Enable Type Filter
😟 🛬 Training Manager Portal 🖶 🛬 WFM	Show items needing critical attention 3 💮 days warning (Only applies to Meetings with Recurrence)
tor Section ⊕ ∰ Configuration	Show items needing attention soon 10
	Image: Status Main Title Type Status Status Next Date End Date Next Stat Date Duration (Minutes) Recurrence
	Tea
	Tet New Meeting 10 Jul 2010 08:00 9 Aug 2010 22:00 30 Monthly (Mon, Tue, V
	Det A Tet A Edit Meeting 10 Jul 2010 09:00 9 Aug 2010 22:00 30 Monthly (Mon, Tue, V
	Image: Complexity Supplicate Meeting to other Team(s) 10 Jul 2010 08:00 9 Aug 2010 22:00 30 Monthly (Mon,Tue,V
Sub Menu Constraints Constrai	Clear Next Dates Clear Next Dates Delete Meeting
eam 3 ⊕-⊒ Reston ⊛-⊒ Cincinnati	
	Export
Preferences -	4 Rem(s)

The Genesys WFM Sites & Teams structure is then presented to select from. After selection click on 'OK'

Se Training Manager				_ 2 ×
Elle View Training Help Main Menu	🛆 User Selection 📃 🗆 🔀) <u> </u>		
Training Manager Training Manager Training Requests Scheduler Training Manager Portal VFM Scheduler Configuration	User Selection Display Mode WFM Sites & Teams	t Date Next End Date	30 30	Monthly (Mon, Tue, V Monthly (Mon, Tue, V
Sub Menu			30 30	Monthly (Mon, Tue, V Monthly (Mon, Tue, V
Sub Meru WFM WFM Fint Direct National Bank Fint Direct National Bank F	55 Selected			Expot
Preferences -	4 Item(s)	2)		

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

SkillsPlanner - Version 2.5									_	BX
Eile Iraining Applications Help										
Main Menu	Meeting Filters									
SkillsPlanner Training Requests	📃 Enable Status Fil	ter				~				
→ Meetings ⊕ ♣ ∰ Resources ⊕ ₩ ₩ ₩ Scheduler	🔲 Enable Type Filte	er				~				
	Show items need	ding critical attention	3 🤤 day	s warning (Only app	plies to Meetin;	gs with Recurrence)				
Genesys WFM	Show items need	ling attention soon	10 🤤 day	s warning (Only app	plies to Meeting	gs with Recurrence)				
Configuration System	Show items need	ling no attention								
-	🗌 Only show items		e 🔗 Refrest	Next Dates	Coptimised	Searches				
	Status Main Title		Туре	Status	箭 Team	Start Date	End Date	Next Start Date	Next End Date	Durati
	Team 1 Mor	thly Moeting		Pending Approval		24 May 2010 00:00				60
	Copy of Tea					24 May 2010 08:00				60
	🗌 🛃 Copy of Tea	m 1 Monthly Meeting	Team Meeting	Pending Approval	Team 3	24 May 2010 08:00	23 Jun 2010 18:00			60
Sub Menu										
Meetings										
ia – 🥪 Genesys WFM ia – 📥 First Direct National Bank										
😑 🔲 Modesto										
- 🎆 Team 1										
🛶 Team 2										
🕀 📃 Reston										
🖮 – 🔲 Cincinnati										
	<									>
										Export
Preferences +	3 Item(s)									

The main title can be changed by either double clicking on the main title team name or right clicking and select ' Edit Meeting...' from the menu options presented.

😸 Training Manager	
Eile View Training Help	
Main Menu	Meeting Filters
	Enable Status Filter Enable Type Filter Show items needing critical attention Show items needing attention soon 10 to days warning (Only applies to Meetings with Recurrence) Show items needing no attention Only show items without Next Dates New Meeting Select. All & Delete & Refresh Next Dates Status Main Title Copy of Team 1 Team meeting Div Cancel Up 2010 22:00 30 Monthly (Mon, Tue V) Team 2 Team 2 Team. Team Meeting Active Team 3 Aug 2010 09:00 2 Sep 2010 22:00 30 Monthly (Mon, Tue V) Export Status Filter Status Filter Export Status Filter Status Filter Status Filter Status Main Title Export Status Filter Status Filter Status Filter Status Main Title Status Main Title Status Main Title Status Filter
: Serrerences +	5 Item(s)

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 ticking the boxes at the left hand side and then select 'Optimized Searches...'

The 'Meeting Scheduler Options' message box is then presented as per the example below and by leaving the 'Automatically publish Exceptions to Genesys 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 in GFWM.

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

😸 Training Manager		BX
Elle View Training Help		
Main Menu	A Meeting Filters	
Training Manager Training Requests Training Requests Geneting Scheduler Training Manager Portal Users VerM Exception Types User Selection Schody and Selection Training Manager Training Ma	Enable Status Filter Show items needing critical attention Gray show items needing attention Gray show items needing no attention Gray show items needing no attention Gray show items needing no attention Gray show items without Next Dates Next Dates Next Dates Status Team Status Team Status Team Status Team Status Team I Team meeting Team I Team meeting Team I Team Metring Active Team I Active I A	ue,Wed,1 on,Tue,V
Managers	Team 2 To A Meeting Scheduler Options 30 Monthly (Md	
Sub Menu	Team 20 Stream 2	
Concinnati Concinnati	Important Note: If you do not like this option, then Coverage Tolerances may not be We proceed this is because unpublished Meeting Sectors will not keep Coverage Data in WFM up-to-date, and could result in bookings which violate the desired Coverage Trelerance QK Cancel	> Export
Preferences 👻	S Item(s)	

Once the optimized search has been completed the schedules can be viewed by double clicking on the required meeting to reveal the meeting template and then select the 'Workforce Management' tab to view the scheduled sessions. As the flags are green the exceptions will have been committed into GWFM.

Search anager	
Eile Yiew Iraining Help	
Main Menu	Start User Selection Meeting Scheduler Workforce Management
🕀 🥪 Training Manager 📃 🔺	
🕀 🔲 Training Requests	View all Meetings and the status of their Exceptions in Workforce Management.
Meetings	Select All 💥 Delete 🖑 Refresh 💭 Export
⊕ 9 06 Resources ⊕ I Scheduler	: Jelect All X Delete K Refresh (Delete.
Scrieule Scrieule Training Manager Portal	Exceptions Legend:
	ศ DK 💋 Some/All Missing
B-S WFM	
Exception Types	V Enable Date Filter
User Selection	Start Date 03 Aug 2017 End Date 02 Sep 2010
😑 🍪 Configuration	
Training Manager	
Meeting Types	Master Schedule (2) Schaitos (0)
Booking Categories	🛗 Start Date 🖉 End Date 🛛 🌉 Room Max. Seats 🧟 Manager 🧟 Employee ID # Users 🙆 Name(s)
B Resources	📭 27 Aug 2010 19:45 < None> David Johnson second_manager 11 Abel Penunuri, Enej Pelletier, Fertisha Ramero, Jennifer Rej
Rooms	📫 2 Sep 2010 09:00 2 Sep 2010 09:30 <none> David Johnson second_manager 7 Amy Reicher, Jennifer Rhoades, La Tasha Porras, Lydia Ra</none>
Trainers	
Managers 🖌	
Sub Menu	
😑 🔲 Meetings	
B WFM	
🚊 📥 First Direct National Bank	
😑 📮 Modesto	
Team 1	
-∰an Team 2 — ∰an Team 3	
e ∏ Reston	
🗉 🛄 Lincinnati	
	2 ltem(s)
/	
Preferences -	< <u>Previous</u> Next> <u>Apply</u> <u>Qose</u>

To exit out of the meeting template click on 'Close' at the bottom of the window.

There is an export option to view the training session detail.

rooltip	Start Date	End Date	Room	Max. Seat	Manager	Employee ID	# Users	Name(s)	Exception
	\							Ann Larson, Bandi Neal, Candi Stolpe, Eduardo Garcia,	
Exceptions are OK	1							Gurutej Kaur, Joan Stuart, Kim Lewis, Nicole Stutts, Pele	
in Genesys WFM.	28/05/2010 12:30	28/05/2010 13:30	<none></none>		Gordon Bens	first_manager		Lolani	Team Meeting
	1							Amy Jay, Dick Clarkson, lan Johnson, Kai Lemieux, Lynne	
Exceptions are OK	/							Suzanne, Mary Gail, Nicole Stutts, Shane Carlson, Tianni	
in Genesys WFM.	09/06/2010 12:00	09/06/2010 13:00	<none></none>		Gordon Bens	first_manager	9	Ayala	Team Meeting

Within 'Tooltip' is an indicator of whether the exceptions are OK in GWFM. If any exception had been altered in WFM the tooltip would change to identify this.

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 ticking the boxes at the left hand side, then click on 'Next Dates'. The 'Meeting Next Dates' message box will be presented as per the example below.

There are 3 options available:

- Suggest Next Dates for all selected meetings by selecting this option, Genesys 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 1 month then Genesys Training Manager will suggest dates for the 1 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 OK.

😸 Training Manager	
Eile View Training Help	
Main Menu	Meeting Filters
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	10 22:00 30 Monthly (Mon, Tue, V
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The new suggested dates will then appear under 'Next Start Date' & 'Next End Date'.

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sub refui ■ WFM WFM ● Modesto ■ Feam 1 ■ Team 2 ■ Reston ⊕ Reston ⊕ Erem 3 ⊕ Reston	
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If the meetings dates suggested are correct select 'Next Date' again and the option 'Apply Next Dates for all selected Meetings'.

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

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- managere	×			One To One	Active		10.101 2010 08:00		<u> </u>		30	Monthly (Mon, Tue, V
Sub Menu			Team 3 Team meeting	Team Meeting	Active	Team 3 🕻	3 Sep 2010 09:00	2 Oct 2010 22:00	>		30	Monthly (Tue,Wed,1
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Once the dates have been updated click on 'Optimized Searches...' and Genesys Training Manager will use all of the criteria in the meeting request templates to schedule the meetings as required.

By leaving the 'Automatically publish Exceptions to Genesys WFM for all Meetings' this will publish the exceptions to WFM and by having the 'Status' as 'Active' the meeting sessions will appear in the manager and agents web portals.

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Ele View Training Help	
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There are filter options available in the Meeting Window 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, Team Huddle or One to One

The days warning filters are used where the current 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 meeting that need attention to be visible.

Training Request Start Date Filter

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



Right click on the date filter and the option to open the training window filter appears, as per the example below.



Enter the required start date range and then select OK.

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

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Preferences •	

Reports

The following reports are available in Genesys Training Manager.

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' and by clicking on the training request name this will present a view similar to the example below.

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

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Training Plan Constraining Plan Constraining Plan Constraining Plan New Phone Laurch New Mobile Upgrades Constraining New Forduct Laurch (e-learning) Or Wen Tarift Laurch	Amy Andrew Ann Bandi	Reicher Faust Larson Neal Lis	U_8349_Simulator U_7004_Simulator U_8224_Simulator U_8232_Simulator II_8227_Simulator	Warrington Warrington Warrington	Team 3 Team 1 Team 1 Team 1 Team 1	Modesto Modesto Modesto Modesto	First Direct National Bank First Direct National Bank First Direct National Bank First Direct National Bank First Direct National Bank	Blackberry Retraining Blackberry Retraining Blackberry Retraining	BBRT001 BBRT001 BBRT001 BBRT001 RBRT001	Training Plan 1 E Training Plan 1 E Training Plan 1 E Training Plan 1 E Training Plan 1 E
Beserving Rooms & Training Ornpleted Preferences •	80 Item(s)									🛃 Export

Training Summary by Status Report

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

By clicking on the actual status, for example, Active or Completed, this will show a summary for each of

the training requests within that file similar to the example below.



Agent Detail Completion Report by Training Event

A completion status report for the training event is available which 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'. By selecting the last option this will present 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, 'Enable Date Filter'

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	Reserving Rooms & Training Completed	🛃 Export	
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Completion Status Report

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

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

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

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

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Preferences 👻	97 Item(s)								

Individual Agent Training Summary Report

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

Expand 'Training Requests' in the 'Main Menu' window and select 'Completion Status'. A list of all of the training status will then be available, for example, Pending Approval.

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Select the status to report against and then right click to get the additional option of 'View by WFM database'.

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Completed Engleted	🌌 Alison	Smith	U_8310_Simulator	Warrington	Team 5	Reston	First Direct National Bank	Andrea Test	AT001	Training
	💐 Amy	Reicher	U_8349_Simulator	Warrington	Team 3	Modesto	First Direct National Bank	New Product Launch (e-learning)	NPL001	Training
	🔤 Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New Product Launch (e-learning)	NPL001	Training
	🌌 Angela	Thomas	U_8342_Simulator	Warrington	Team 5	Reston	First Direct National Bank	Andrea Test	AT001	Training
	💐 Bandi	Neal	U_8232_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New Product Launch (e-learning)	NPL001	Training 🗠
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This will then present a list in the 'Sub Menu' of the available sites or scheduling pots to select from.

Expand the tree view in the 'Sub Menu' down to the relevant team view to find the individual agent to report against.

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Meetings	Enable Code Filter
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- Andrew Faust [U_7004_Simulator]	
Ann Larson (U_8224_Simulator)	
Bandi Neal [U_8232_Simulator]	
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Click on the individual agent to view all of their scheduled training activity together with the status and any comments.

Date and status filters are also available.

Training Aenager Intering Request Intering Request Records Besting Request Staf Date Date Staf Date Date<	🥃 Training Manager		
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Exportable Training Overview Report

This report is available by expanding 'Training Requests' in the 'Main Menu' and select 'Reports'.

Select the required report from the pull down 'Report' box. Change the date range in 'Start Date' and 'End Date' if required and then click on 'Refresh'.

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Preferences -	6 Item(s)									

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

This information can also be exported by selecting the 'Export' button.

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Preferences -	2 Item(s)							

Multiple Trainer Courses Report

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

This information can be exported if required.

		Select the required report	
🤘 Training Manager		Select the required report	- 8 ×
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	Report Training Overview Training Overview Training Overview Start Date 26 Jul 2010 Y End Date 09 Aug 2010	⊻ Ø Refresh	
Sub Menu			
-T Reports		Export if required although t data could be immediately o of date.	
Preferences -			Export

Useful Tips

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