GENESYS

AN ALCATEL·LUCENT COMPANY

Genesys Training Manager 8.0

Web Portal Agent Guide

About Genesys

Alcatel-Lucent's Genesys solutions feature leading software that manages customer interactions over phone, Web, and mobile devices. The Genesys software suite handles customer conversations across multiple channels and resources—self-service, assisted-service, and proactive outreach—fulfilling customer requests and optimizing customer care goals while efficiently using resources. Genesys software directs more than 100 million customer interactions every day for 4000 companies and government agencies in 80 countries. These companies and agencies leverage their entire organization, from the contact center to the back office, while dynamically engaging their customers. Visit www.genesyslab.com for more information.

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.

Notice

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

Your Responsibility for Your System's Security

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

Trademarks

Genesys, the Genesys logo, and T-Server are registered trademarks of Genesys Telecommunications Laboratories, Inc. All other trademarks and trade names referred to in this document are the property of other companies. The Crystal monospace font is used by permission of Software Renovation Corporation, www.SoftwareRenovation.com.

Ordering and Licensing Information

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

Released by: **Genesys Telecommunications Laboratories, Inc.** www.genesyslab.com

Document Version : 80_trainingmgr_agent_03-2011_v8.0.256.00

Table of Contents

1 Preface

Welcome to the *Genesys Training Manager Web Portal Agent Guide.* This guide is designed to explain the application in very user friendly terms and walk through how to navigate the system.

This access has been provided for agents to have visibility of training that has been scheduled for them, together with the trainer, room and the reason for the training.

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 `orderman@genesyslab.com`.

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

About Genesys Training Manager

Genesys Training Manager enables companies to create, manage, and schedule multiple agent training activity, team meetings, and one-on-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-on-ones, this automatically includes the manager. A browser-based Web portal is included as part of the application, allowing visibility of the scheduled training and meeting activity, together with any other details available. For example, it describes the reason for the training, the room, the identity of the trainer, and any pre-training work of the Manager, as well as whom has attended. 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 `Techpubs.webadmin@genesyslab.com`.

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)	support@genesyslab.com.au
Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868 (International)	support@genesyslab.com.au
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 *Genesys Technical Support Guide* 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 `http://genesyslab.com/support`.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at `orderman@genesyslab.com`.

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 *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x stands for . . .
Monospace font (Looks like `teletype` or `typewriter text`)	All programming identifiers and GUI elements. This convention includes: - The *names* 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.

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. | `smcp_server -host`
`<confighost>` |

Chapter

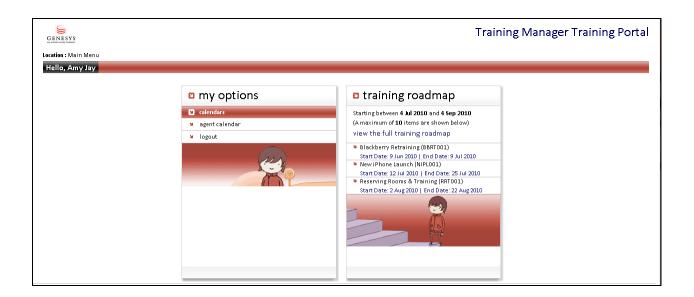# 2   Web Portal Agent

The Agent

When the agent logs on to the system they are presented with a view similar to the example below.

The agent has access to:

- my options

- training roadmap

The screen is separated into two sections, 'my options' in the left hand window and the 'training roadmap' detail in the right hand window.
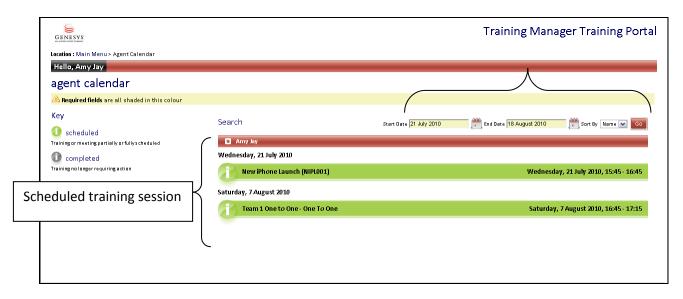
Details of any training sessions will only be visible in the portal if the advisor has been scheduled any training in Training Manager and this has been approved.

Location : Main Menu

Hello, Amy Jay

my options

calendars

↘ agent calendar

↘ logout

training roadmap

Starting between **4 Jul 2010** and **4 Sep 2010**
(A maximum of **10** items are shown below)

view the full training roadmap

↘ Blackberry Retraining (BBRT001)
    Start Date: 9 Jun 2010 | End Date: 9 Jul 2010
↘ New iPhone Launch (NIPL001)
    Start Date: 12 Jul 2010 | End Date: 25 Jul 2010
↘ Reserving Rooms & Training (RRT001)
    Start Date: 2 Aug 2010 | End Date: 22 Aug 2010

My Options

My Training

By selecting 'agent calendar' this reveals any scheduled training activity. The date range can be altered using the date filter.
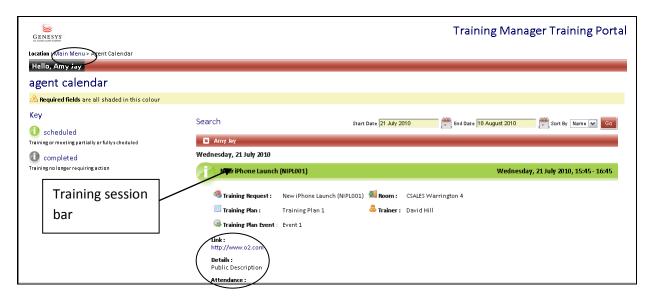
Clicking on the training session bar reveals the details, for example, who the trainer is, the location of the room, and any additional notes about the session.

Where there is a link to e-learning content, click on the link to go directly to the content without having to navigate through the system.

The status of the training is color-coded as per the status key.

Click on 'Main Menu to return to the home screen at any time.

After a classroom training session has been completed, each individual's attendance record will be updated by the Trainer with the information appearing against Attendance and Completion.

E-learning attendance may also be updated and visible against the scheduled e-learning activity.
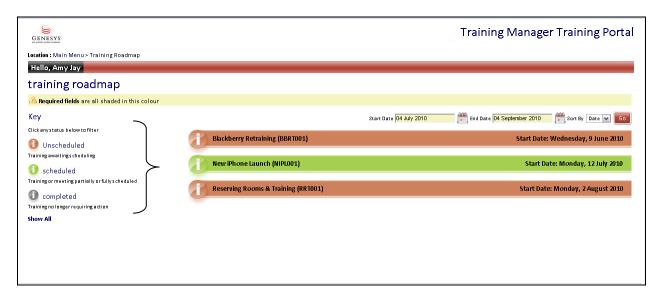
Training Roadmap

The training roadmap is displayed in the right hand window and the latest training activity is visible in the training roadmap window.

Select '**view the full training roadmap'** to view all of the training sessions currently scheduled in Training Manager.
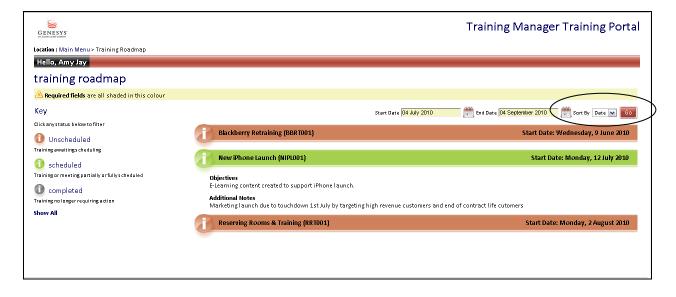
The training is color-coded based on the status indicators.

Click on the training session to reveal any additional details, for example, Objectives or Additional Notes.

The training sessions can also be filtered using the 'sort by' pull down box.

Log Out

The option to logout is on the home page.