Genesys Training Manager 8.0

Web Portal Manager Guide

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Table of Contents

Chapter

1 Preface

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

Access has been provided for managers to view what training activity their agents have been scheduled for, together with the trainer, room and the reason for the training.

The training roadmap, with any scheduled training activity is also visible.

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. This automatically updates Training Manager, 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 `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 Manager

The Manager

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

The manager has access to:

- Manager calendar

- Agent calendar

- Room calendar

- Logout

- Set your regular working hours

- Set exceptions to your regular hours

The screen is separated into two sections, 'my options' in the left hand window and the 'training roadmap' detail in the right hand window.

Training information will only be visible in the portal if training sessions have already been

created in Training Manager.
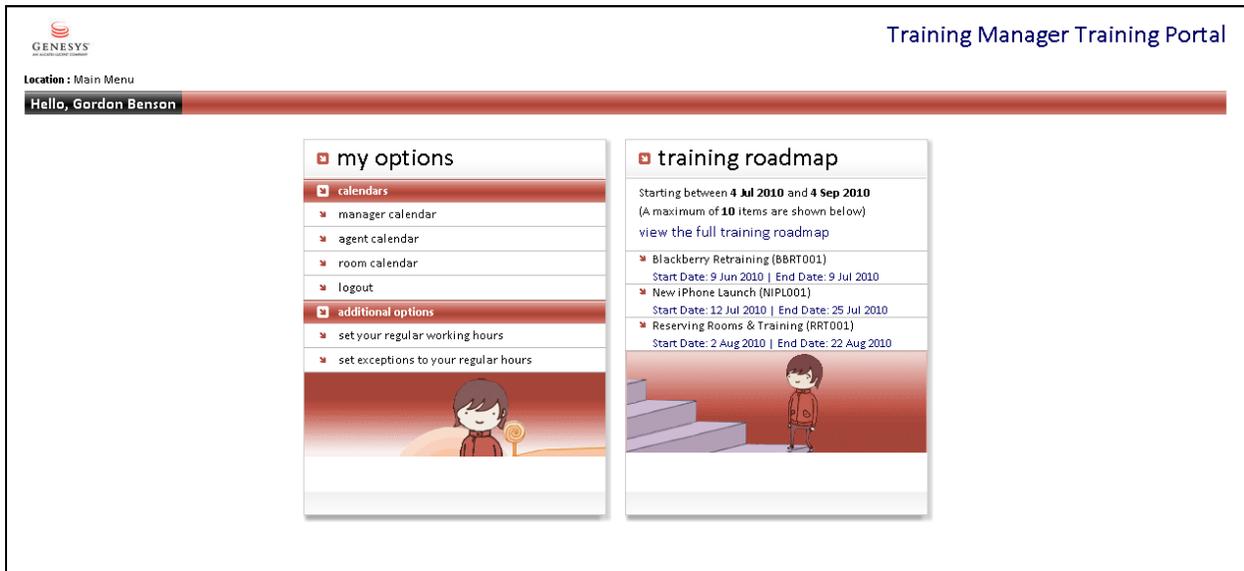
My Options

Manager Calendar

Selecting 'manager calendar' from the home page will present a standard view of any scheduled activity. This will include any team meetings, one to ones or any other activity that has been entered through the 'Planner View'.

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

Location : Main Menu > Manager Calendar

Hello, Gordon Benson

manager calendar

⚠ **Required fields** are all shaded in this colour

Key

🟢 scheduled
Training or meeting partially or fully scheduled

ℹ completed
Training no longer requiring action

🟡 Other
Non-Training Activity

| Standard View | Planner View |

Search   Start Date 07 May 2010 📅 End Date 18 August 2010 📅 Sort By Manager ▼ Go

Gordon Benson

Friday, 7 May 2010

| ℹ | 12:45 - 13:15 | Team1 One to One - One To One with Gordon Benson |

| ℹ | 13:45 - 14:15 | Team1 One to One - One To One with Gordon Benson |

Thursday, 13 May 2010

| ℹ | 15:00 - 15:30 | Team1 One to One - One To One with Gordon Benson |

Friday, 14 May 2010

| ℹ | 09:30 - 10:00 | Team1 One to One - One To One with Gordon Benson |

| | 13:15 - 13:45 | Team1 One to One - One To One with Gordon Benson |

By clicking on one of the schedule bars this will reveal any other detail associated to that scheduled item.

In the example below the scheduled One to One is with agent Linda Sweeney.

Selecting the 'Planner View' gives more of a calendar view of any scheduled activity, as per the example below. The planner view can be viewed in Day, Week or Month as required.

The event is color coded as per the Key at the left hand side of the screen.

As Training Manager will schedule team meetings and One to Ones based on the agent scheduled activity in WFM and their manager availability; the manager has to keep their availability in Training Manager up to date.

The manager can enter any non availability time directly into Training Manager through their web portal in the planner view.

To enter any non availability, right click on the required date and three options are presented:

- New entry
- Go to today – this will take the planner view to the current date
- Show 24 hours… - this will present the planner view in a 24 hour view

To enter a holiday for example, select 'New entry'

The 'New Manager Calendar Entry' template is then presented.

Enter details in the Subject and complete the 'Start time' and 'End time' if the entry is for a single day.

Select the category from the drop down box (this will be color coded as per the key at the left hand side).

To create an entry for multiple days, select 'Recurrence'.
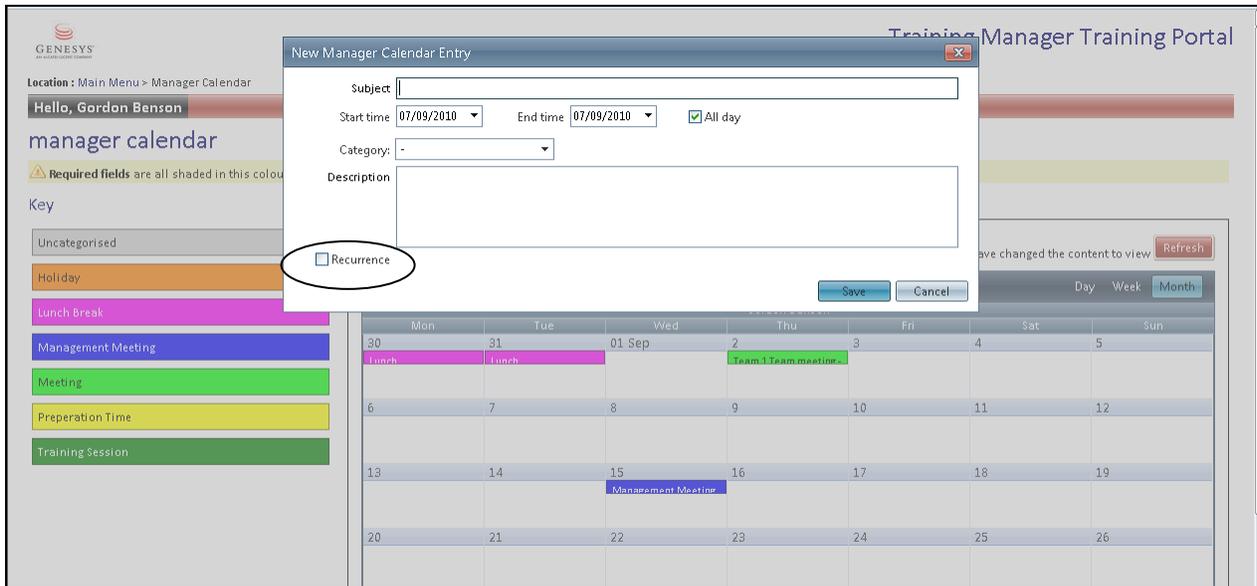
For multiple day entries use Recurrence to create individual event when viewed in the 'Standard View'.

In the example below three days holiday is being entered into the manger's calendar. The start time is 06/09/2010 at 08:00 and the end by date is the 08/09/2010 at 17:00. This will then create 3 separate holiday entries in the standard view.
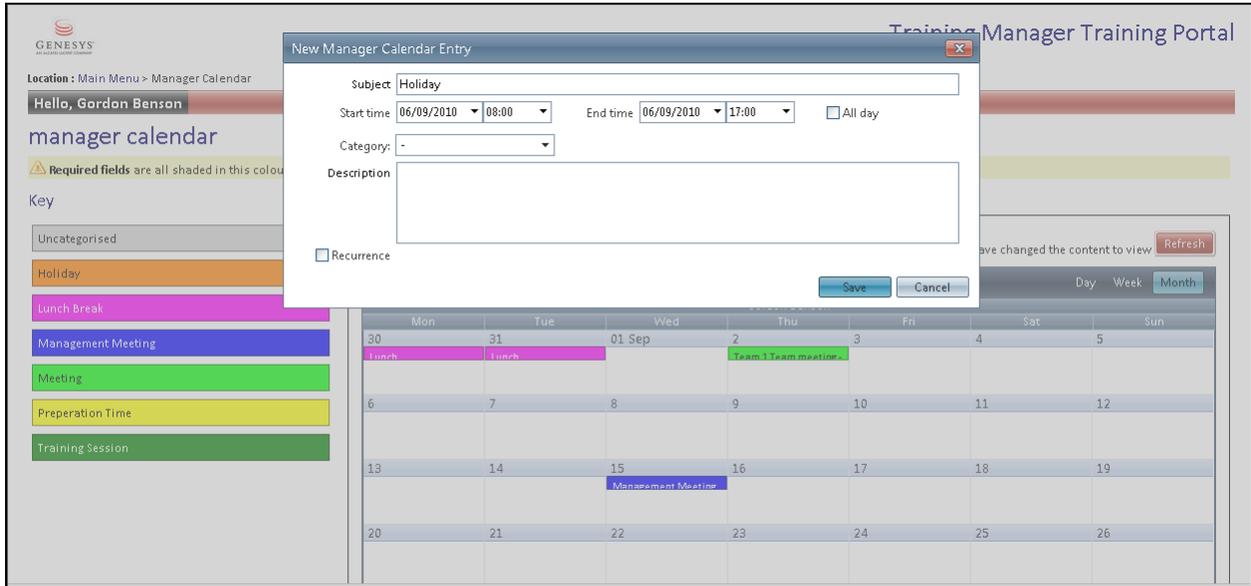
Select the relevant 'Category' from the drop down box. This will display the entry with the associated name and color for easy visibility (the categories are created in Training Manager).
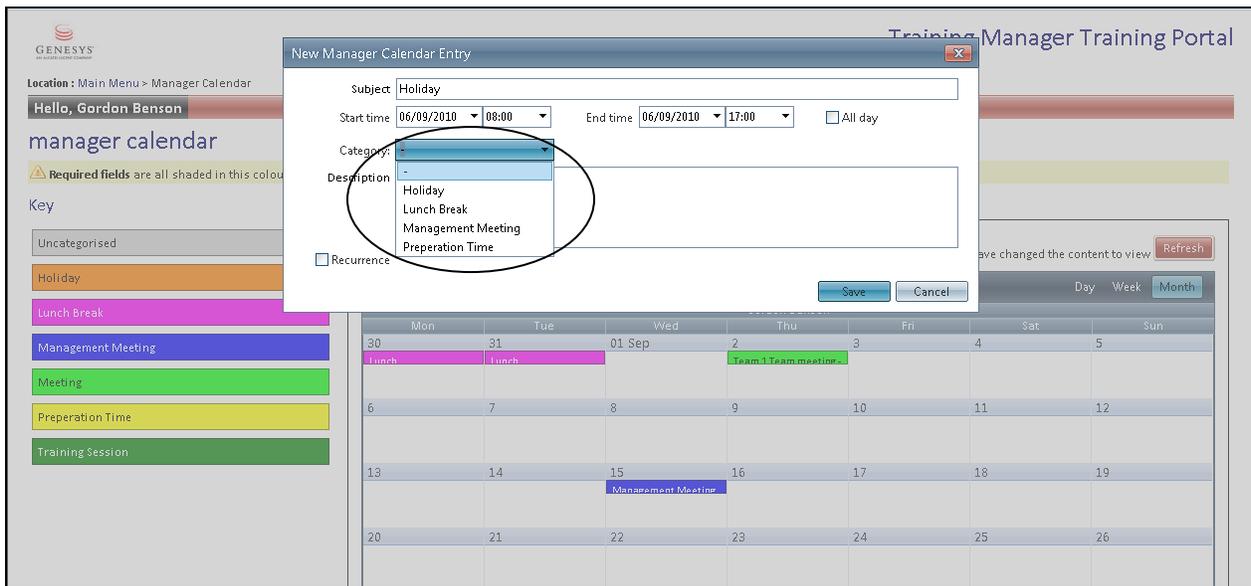
After selecting 'Recurrence' the options are then available to select from. As the entry is for 3 days, Daily has been selected, together with 'Every weekday' to exclude weekends and an end date is selected.

Select 'Save' once all of the detail has been completed and the event will then appear in the manager calendar.

This will also appear in the 'Standard View' as an entry for each date.

To edit an existing entry (this is only where an entry has been created in the 'Planner View' as any scheduled Training Manager activity , such as One to Ones or other meetings, can only be amended in Training Manager), select the 'Planner View and right click on the entry. This will present three options:

- Edit entry – will allow amending the original entry either by individual date or the multiple entry
- Delete entry – will delete the individual date
- Delete all future occurrences – will delete the multiple dates associated to the entry

Select the appropriate option.

In this example 'Edit entry' has been selected which presents a further option.

'Edit only this occurrence' – allows for editing the individual date.

'Edit the series' allows for editing the complete multiple entries.

Agent Calendar

By selecting 'Agent calendar' this will display a list of agents that the manager has access to.
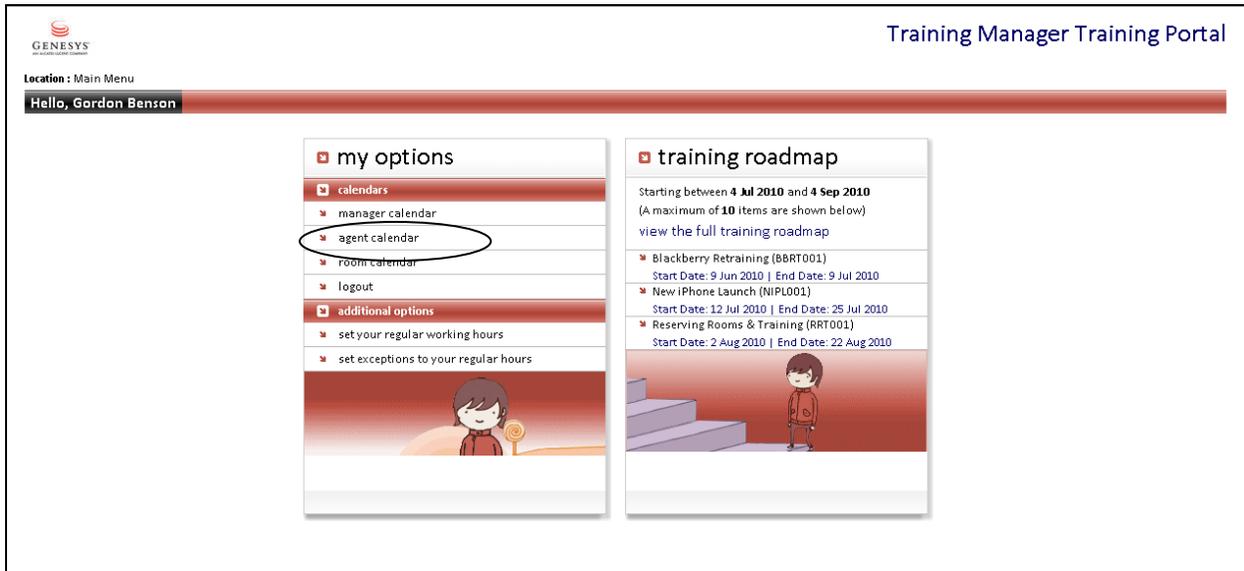
The list of agents names are presented in the bottom left hand corner of the window. (The list of agents may be managed automatically if there has been integration done between Genesys Training Manager Portal and an internal company data source).

By selecting an agent(s) and then clicking on 'Go' this will automatically list the agent(s) training activity within the date range specified.

By clicking on the training session this expands to reveal the trainer, room and any session details. The training status is color coded in line with the status indicators.

The option to view all of the agent calendar is available by clicking on 'Select All'.

This option allows the manager to view all of the teams scheduled activity. The information is presented in a similar view to the example above, listing all of the scheduled training activity down the right hand side.

Room Calendar

The Manager also has the option to view the training activity by individual room, by selecting 'Room calendar' from the home page.

A list of all of the rooms is displayed against each location in the bottom left hand side of the room calendar window.

Expand the location to reveal the individual rooms.

Select either the location or an individual room (the date range can be adjusted if required) and then click on 'Go' to view the detail.

Click on the training session bar to display the training activity as per the example below.

Training Roadmap

The latest scheduled training activity will be displayed in the training roadmap in the right hand window, similar to the example below.

Select 'view the training roadmap' to view all of the training sessions currently scheduled in Training Manager.

Any scheduled training activity will be presented in the right hand side of the window for the date range selected and by clicking on the training session additional details are available.

The training is color coded based on the status indicators.

There is the option to filter the sessions using the 'sort by' pull down box.

The training is color coded based on the status indicators.

Click on the training session to reveal any additional details, such as Objectives or Additional Notes. The training sessions can also be filtered using the 'sort by' pull down box.

Set Working Day Defaults

To be able to schedule Team Meetings and One to One's Training Manager needs to understand the manager's availability and working hours (the agents reporting to the manager scheduled hours are taken directly from Genesys WFM).

Select 'set working day defaults' to view the manager's current default working hours'.
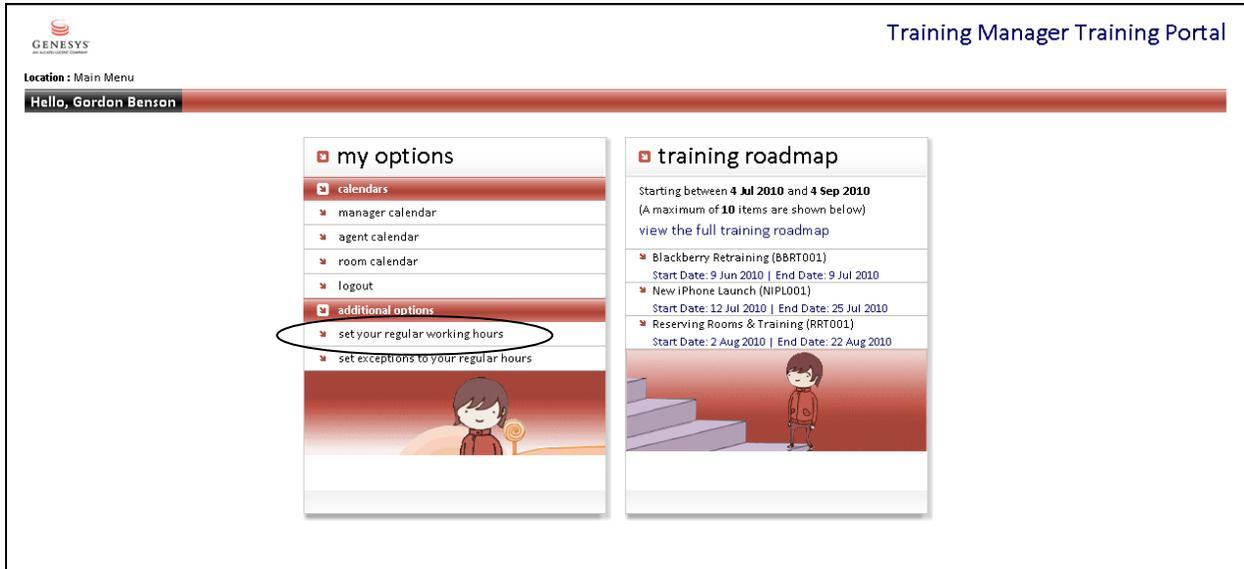
This will present the default hours as per the example below. The manager doesn't work Saturday or Sunday and therefore these days are not selected and are highlighted.
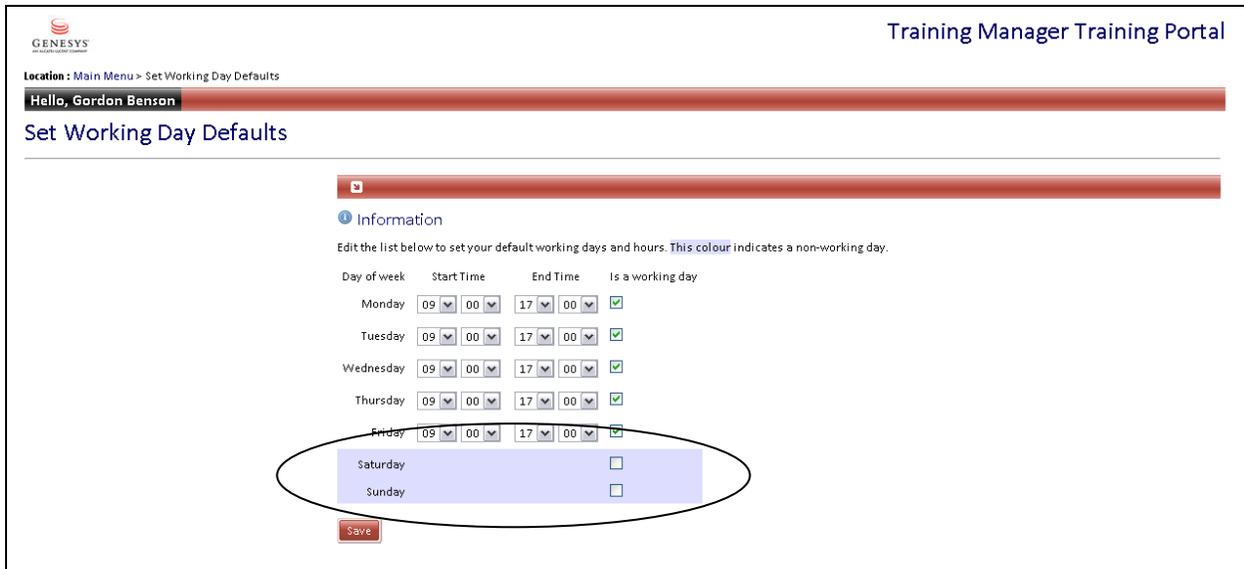
To change the default hours use the drop down box to select the required time. To change the working days either select or deselect the days using the box at the right hand side under 'Is a working day'.

These default working hours feed into the next section of 'set working days'.

Set Exceptions to Your Regular Hours

The default working hours feed through to the working days / hours of the manager and Training Manager uses this information to identify when the manager is available to schedule any meeting activity.

Any changes to the manager's regular hours can be made in 'set exceptions to your regular hours'.
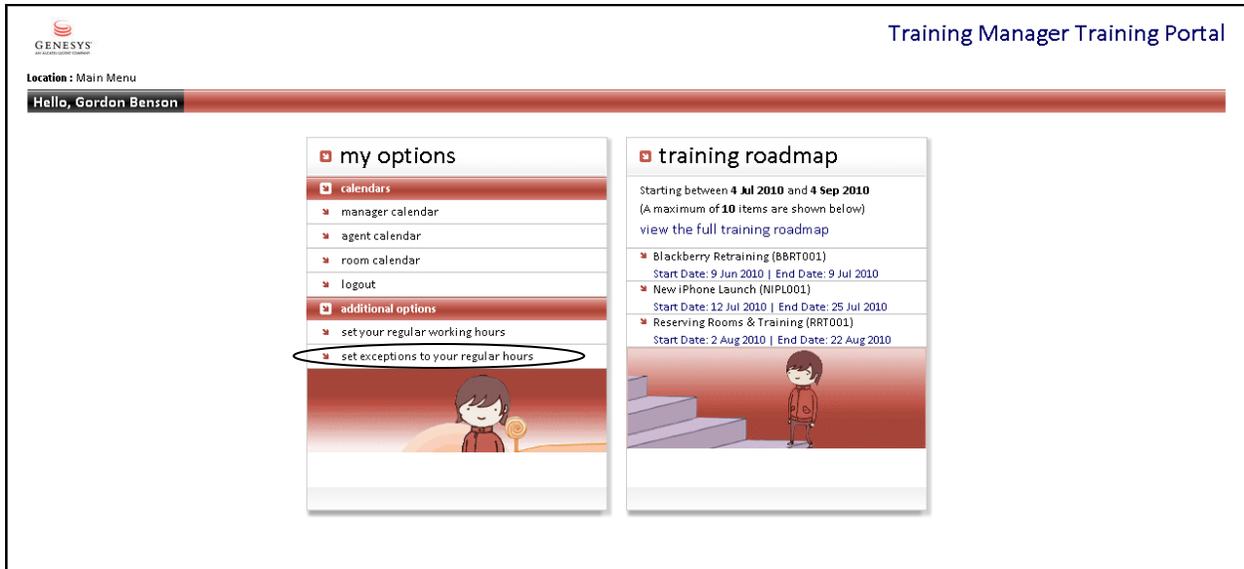
In the example below weekends are identified as non working days for the manager as per the last section 'setting default hours.'

Note: No amendments can be made in the immediate 14 day period.

To make any changes deselect the date required, to indicate the hours are not the default working hours.

Change the hours using the drop down box available and select the required hours.

Leave the 'It is a working day' selected and Training Manager will use these changed hours if scheduling any activity on that date.

This template should not be used for changing hours due to holidays; this is only used where the manager is working different hours to their normal working hours.