



Genesys Training Manager 8.0

Web Portal Manager Guide

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Table of Contents

DfYZUW	(
About Genesys Training Manager.....	4
Intended Audience	5
Making Comments on This Document	5
Contacting Genesys Technical Support	6
Related Documentation Resources.....	6
Document Conventions.....	7
Document Version Number	7
Screen Captures Used in This Document	7
Type Styles	8
K YV'DcfHJ'A UbUj Yf'	9
The Manager	10
My Options.....	11
T æ æ ^! Áæ } åæ Á.....	12
O E ^} o Áæ } åæ Á.....	13
Ü [[{ Áæ } åæ Á.....	14
V! æ æ * ÁÜ [ææ { ææ Á.....	15
Ù ^ o Á [! \ æ * ÁÖ æ ÁÖ ^ æ o Á.....	16
Ù ^ o Á [! \ æ * ÁÖ æ ÁÖ ^ æ o Á.....	17



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 [page 9](#).

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 <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 <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	<ul style="list-style-type: none">Document titlesEmphasisDefinitions of (or first references to) unfamiliar termsMathematical 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).	<p>Please consult the <i>Genesys Migration Guide</i> for more information.</p> <p>Do <i>not</i> use this value for this option.</p> <p><i>A customary and usual practice is one that is widely accepted and used within a particular industry or profession.</i></p> <p>The formula, $x + 1 = 7$ where x stands for . . .</p>
Monospace font (Looks like teletype or typewriter text)	<p>All programming identifiers and GUI elements. This convention includes:</p> <ul style="list-style-type: none">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.	<p>Select the Show variables on screen check box.</p> <p>In the Operand text box, enter your formula.</p> <p>Click OK to exit the Properties dialog box.</p> <p>T-Server distributes the error messages in EventError events.</p> <p>If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls.</p> <p>Enter exit on the command line.</p>

<p>Angle brackets (<>)</p>	<p>A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise.</p> <p>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.</p>	<pre>smcp_server -host <confighost></pre>
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Chapter

2 Web Portal Manager

The Manager

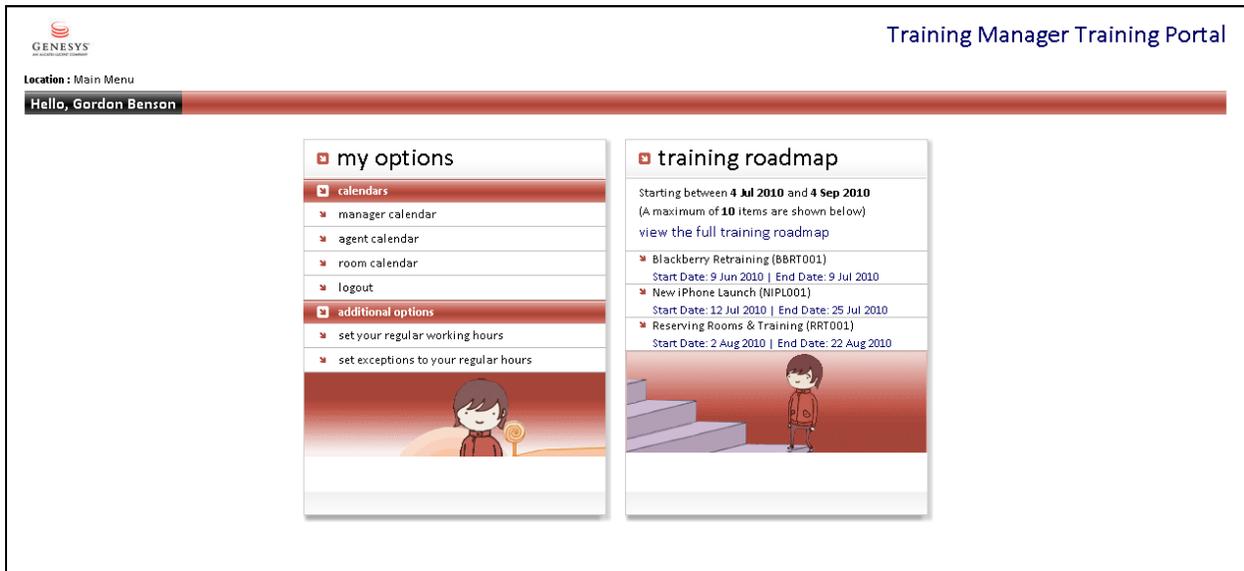
When the manager logs on to the system they are presented with a view similar to the example below.

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
- 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

- 12:45 - 13:15 Team1 One to One - One To One with Gordon Benson
- 13:45 - 14:15 Team1 One to One - One To One with Gordon Benson

Thursday, 13 May 2010

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

Friday, 14 May 2010

- 09:30 - 10:00 Team1 One to One - One To One with Gordon Benson
- 13:45 - 14:15 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.

GENESYS Training Manager Training Portal

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
- 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

- 12:45 - 13:15 Team1 One to One - One To One with Gordon Benson
 - Room: <None>
 - Employee ID First Name Last Name
 - U_8332_Simulator Linda Sweeney
- 13:45 - 14:15 Team1 One to One - One To One with Gordon Benson

Thursday, 13 May 2010

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

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.

GENESYS Training Manager Training Portal

Location: Main Menu > Manager Calendar

Hello, Gordon Benson

manager calendar

Required fields are all shaded in this colour

Key

- Uncategorised
- Holiday
- Lunch Break
- Management Meeting
- Meeting
- Preparation Time
- Training Session

Standard View | Planner View

Click to refresh the calendar if you have changed the content to view Refresh

today July 2010 Day Week Month

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28 Team 2 One to One - One			01 Jul Lunch	2 Lunch	3 Lunch	4 Lunch
5 Lunch	6	7	8	9	10 Team 1 One to One - One Team 2 One to One - One	11
12 Team 1 One to One - One Team 2 One to One - One	13 Team 2 One to One - One	14	15 Team 3 One to One - One Team 2 One to One - One	16 Team 2 One to One - One	17 Team 2 One to One - One more...	18 Team 1 One to One - One
19 Holiday	20 Holiday	21 Holiday	22 Team 3 One to One - One Team 2 One to One - One	23 Team 1 One to One - One	24 Team 1 One to One - One	25 Team 2 One to One - One more...

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'

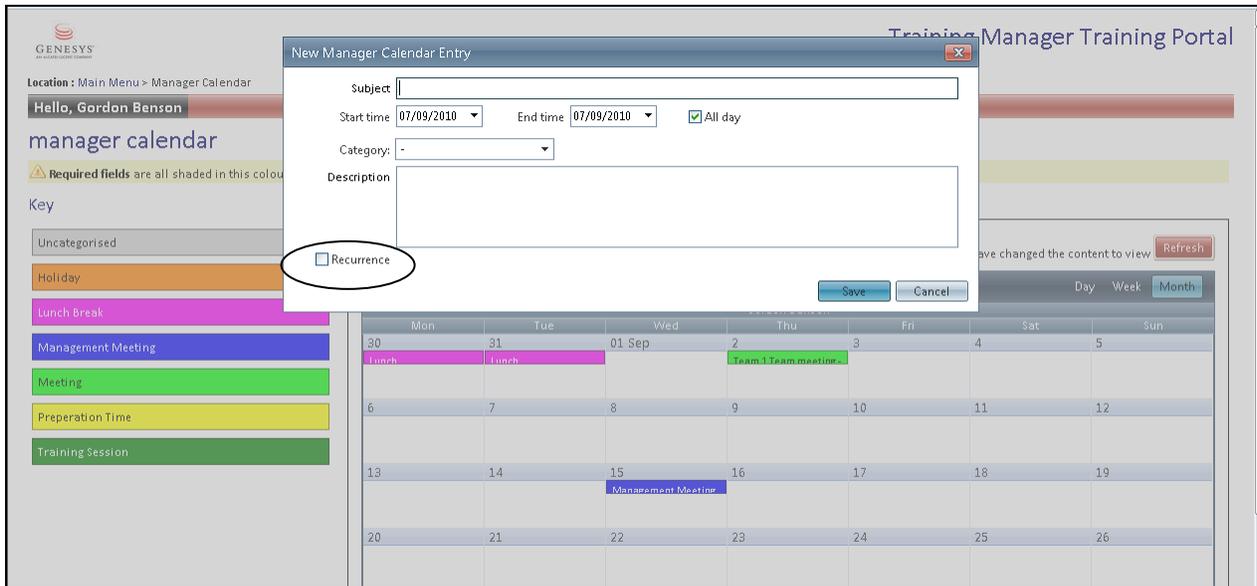
The screenshot displays the 'Training Manager Training Portal' interface. At the top, it shows the Genesys logo and the user's name, 'Hello, Gordon Benson'. Below this, the page title is 'manager calendar'. A key is provided on the left side, listing various activity types with corresponding color-coded boxes: Uncategorized (grey), Holiday (orange), Lunch Break (pink), Management Meeting (blue), Meeting (green), Preparation Time (yellow), and Training Session (dark green). The main calendar area is in 'Planner View' and shows a monthly view for September 2010. A context menu is open over the date '14', offering three options: 'New entry', 'Go to today', and 'Show 24 hours...'. The calendar also shows existing entries like 'Lunch' and 'Team 1 Team meeting'.

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.

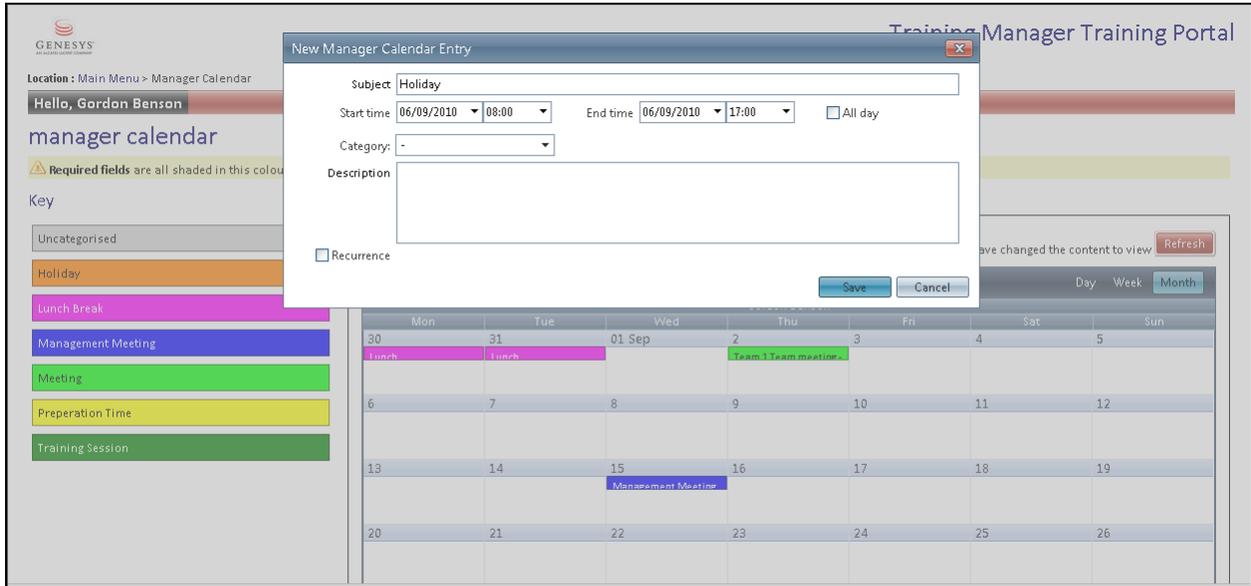
Select the category from the drop down box (this will be color coded as per the key at the left hand side).

To create an entry for multiple days, select 'Recurrence'.

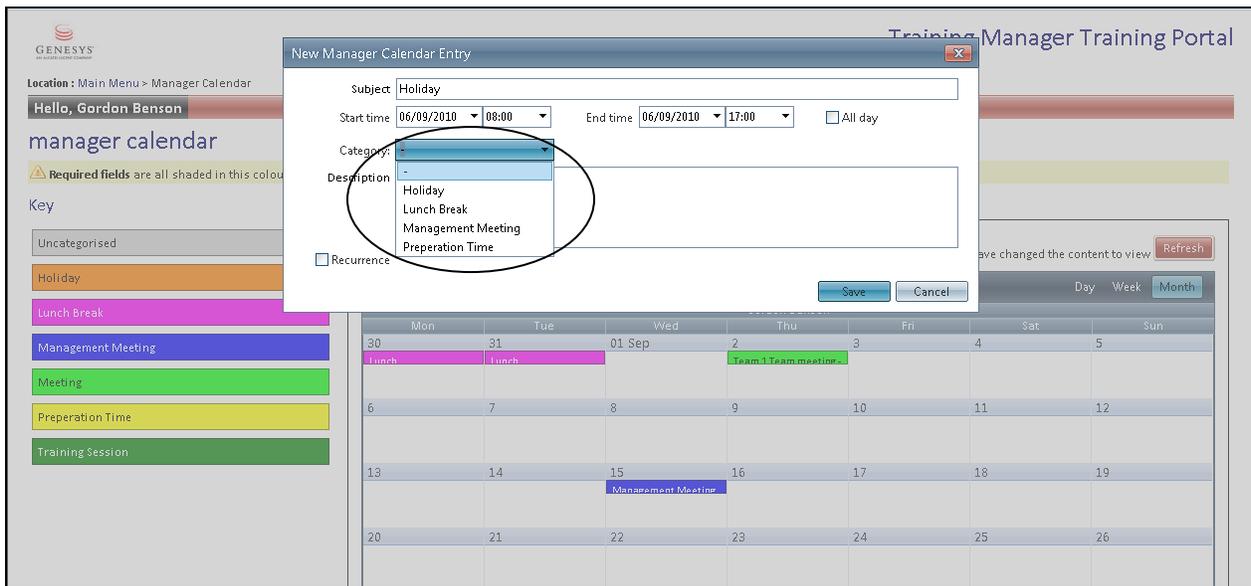


For multiple day entries use Recurrence to create individual event when viewed in the 'Standard View'.

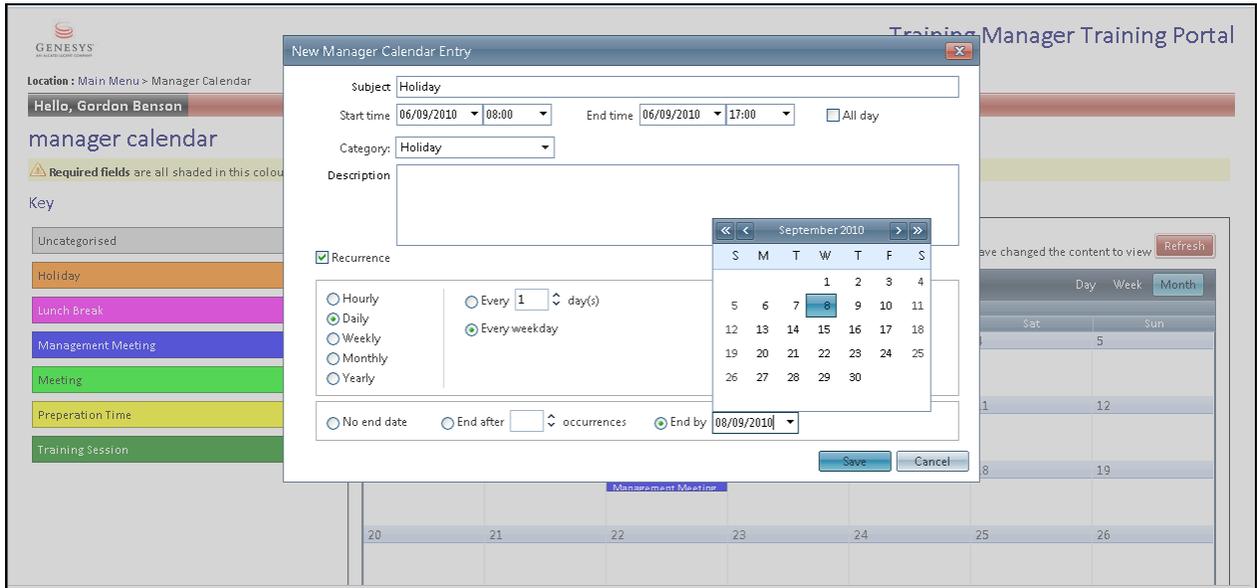
In the example below three days holiday is being entered into the manger's calendar. The start time is 06/09/2010 at 08:00 and the end by date is the 08/09/2010 at 17:00. This will then create 3 separate holiday entries in the standard view.



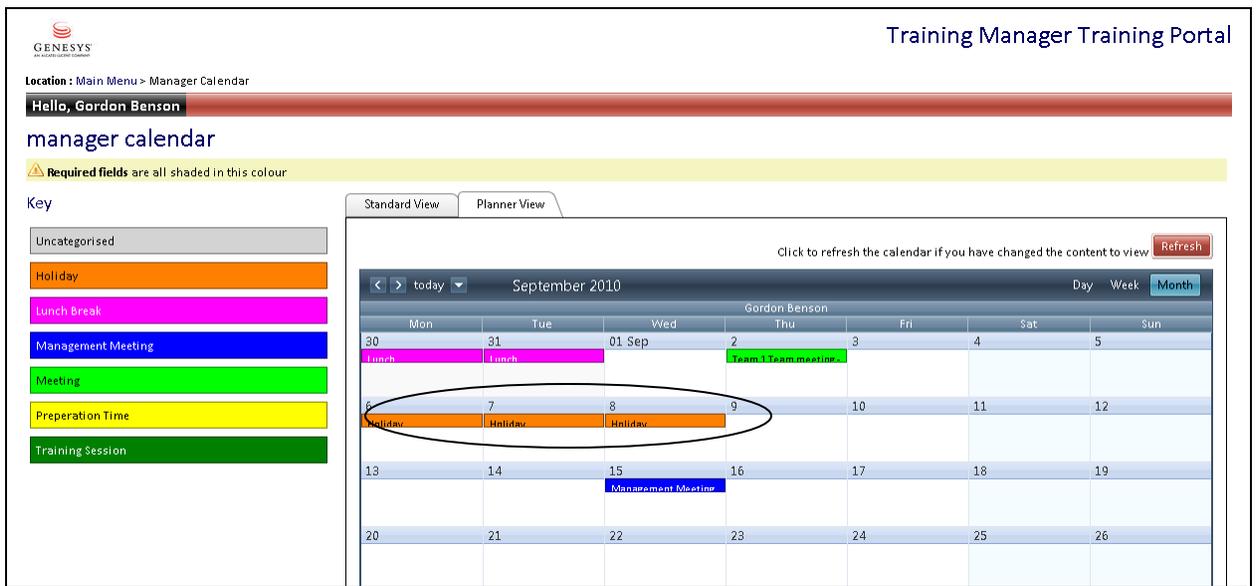
Select the relevant 'Category' from the drop down box. This will display the entry with the associated name and color for easy visibility (the categories are created in Training Manager).



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.

GENESYS
AN ASSURANT COMPANY

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
- completed
Training no longer requiring action
- Other
Non-Training Activity

Standard View | Planner View

Search Start Date 01 September 2010 End Date 24 September 2010 Sort By Manager Go

Gordon Benson

Thursday, 2 September 2010

- 09:00 - 09:30 Team1 Team meeting - Team Meeting with Gordon Benson

Monday, 6 September 2010

- 08:00 - 17:00 Holiday

Tuesday, 7 September 2010

- 08:00 - 17:00 Holiday

Wednesday, 8 September 2010

- 08:00 - 17:00 Holiday

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.

GENESYS
AN ASSURANT COMPANY

Location: Main Menu > Manager Calendar

Hello, Gordon Benson

manager calendar

Required fields are all shaded in this colour

Key

- Uncategorised
- Holiday
- Lunch Break
- Management Meeting
- Meeting
- Preparation Time
- Training Session

Standard View | Planner View

Click to refresh the calendar if you have changed the content to view Refresh

September 2010

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	01 Sep	2	3	4	5
Lunch	Lunch		Team 1 Team meeting			
6	7	8	9	10	11	12
Holiday						
13			16	17	18	19
			Meeting			
20	21	22	23	24	25	26

Edit entry
Delete entry
Delete all future occurrences

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

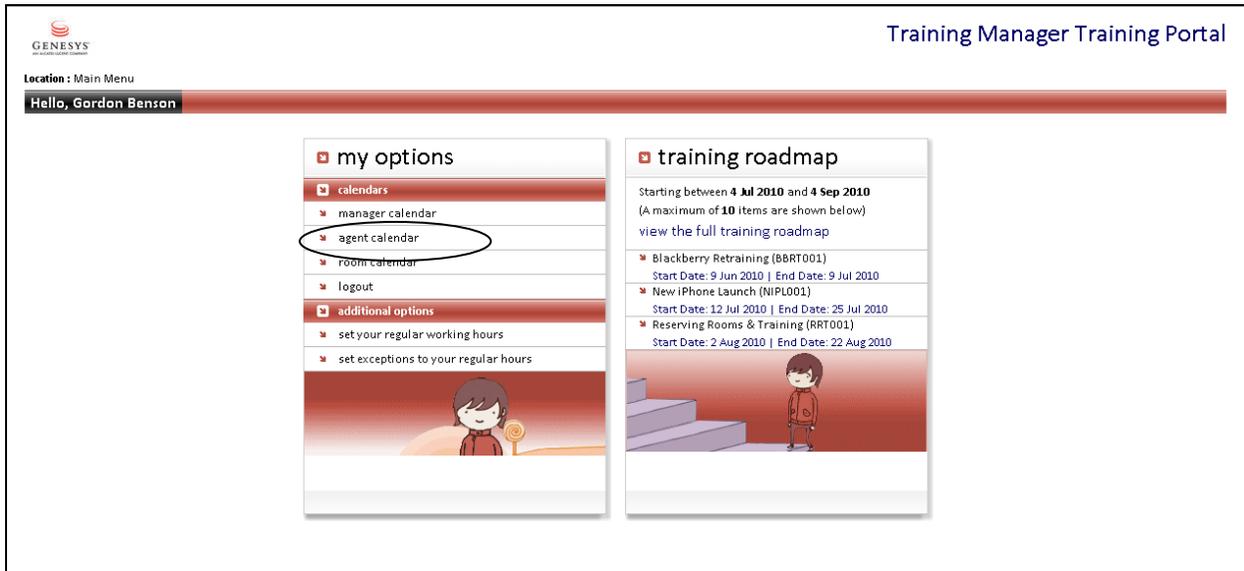
The screenshot displays the 'Training Manager Training Portal' interface. At the top left is the GENESYS logo. The page title is 'Training Manager Training Portal'. Below the header, the location is 'Main Menu > Manager Calendar' and the user is greeted with 'Hello, Gordon Benson'. The main section is titled 'manager calendar' and includes a note: 'Required fields are all shaded in this colour'. There are two tabs: 'Standard View' and 'Planner View'. A 'Key' section on the left lists various appointment types with corresponding color swatches: Uncategorised (grey), Holiday (orange), Lunch Break (pink), Management Meeting (blue), Meeting (green), Preparation Time (yellow), and Training Session (dark green). The main calendar area shows a monthly view for September 2010. A dialog box titled 'Editing a recurring appointment' is open, featuring a warning icon and two radio button options: 'Edit only this occurrence.' (which is selected) and 'Edit the series.'. The dialog has 'OK' and 'Cancel' buttons.

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

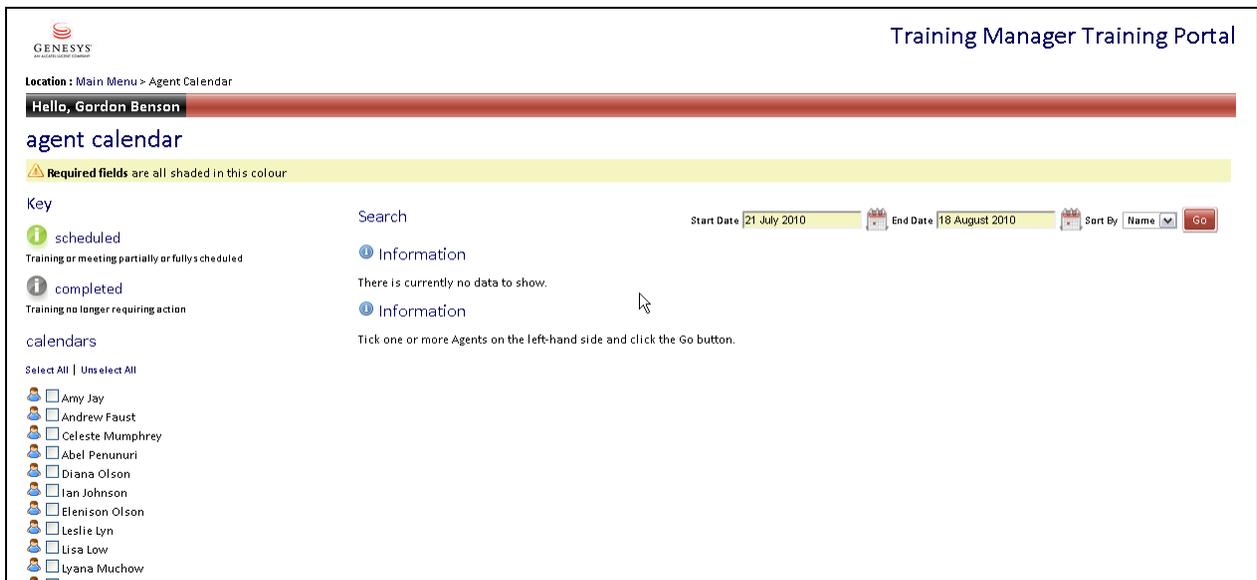
'Edit the series' allows for editing the complete multiple entries.

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.

GENESYS Training Manager Training Portal

Location: Main Menu > Agent Calendar

Hello, Gordon Benson

agent calendar

Required fields are all shaded in this colour

Key

- scheduled**
Training or meeting partially or fully scheduled
- completed**
Training no longer requiring action

calendars

Select All | Unselect All

- Amy Jay
- Andrew Faust
- Celeste Mumphrey
- Abel Penunuri
- Diana Olson
- Ian Johnson
- Elenison Olson
- Leslie Lyn
- Lisa Low
- Lyana Muchow

Search

Start Date: 21 July 2010 End Date: 18 August 2010 Sort By: Name Go

Amy Jay

Wednesday, 21 July 2010

- scheduled** New iPhone Launch (NIPL001) Wednesday, 21 July 2010, 15:45 - 16:45

Saturday, 7 August 2010

- completed** Team 1 One to One - One To One Saturday, 7 August 2010, 16:45 - 17:15

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.

GENESYS Training Manager Training Portal

Location: Main Menu > Agent Calendar

Hello, Gordon Benson

agent calendar

Required fields are all shaded in this colour

Key

- scheduled**
Training or meeting partially or fully scheduled
- completed**
Training no longer requiring action

calendars

Select All | Unselect All

- Amy Jay
- Andrew Faust
- Celeste Mumphrey
- Abel Penunuri
- Diana Olson
- Ian Johnson
- Elenison Olson
- Leslie Lyn
- Lisa Low
- Lyana Muchow

Search

Start Date: 21 July 2010 End Date: 18 August 2010 Sort By: Name Go

Amy Jay

Wednesday, 21 July 2010

- scheduled** New iPhone Launch (NIPL001) Wednesday, 21 July 2010, 15:45 - 16:45

Training Request: New iPhone Launch (NIPL001) **Room:** CSALES Warrington 4

Training Plan: Training Plan 1 **Trainer:** David Hill

Training Plan Event: Event 1

Link: <http://www.o2.com>

Details: Public Description

Attendance: Attended

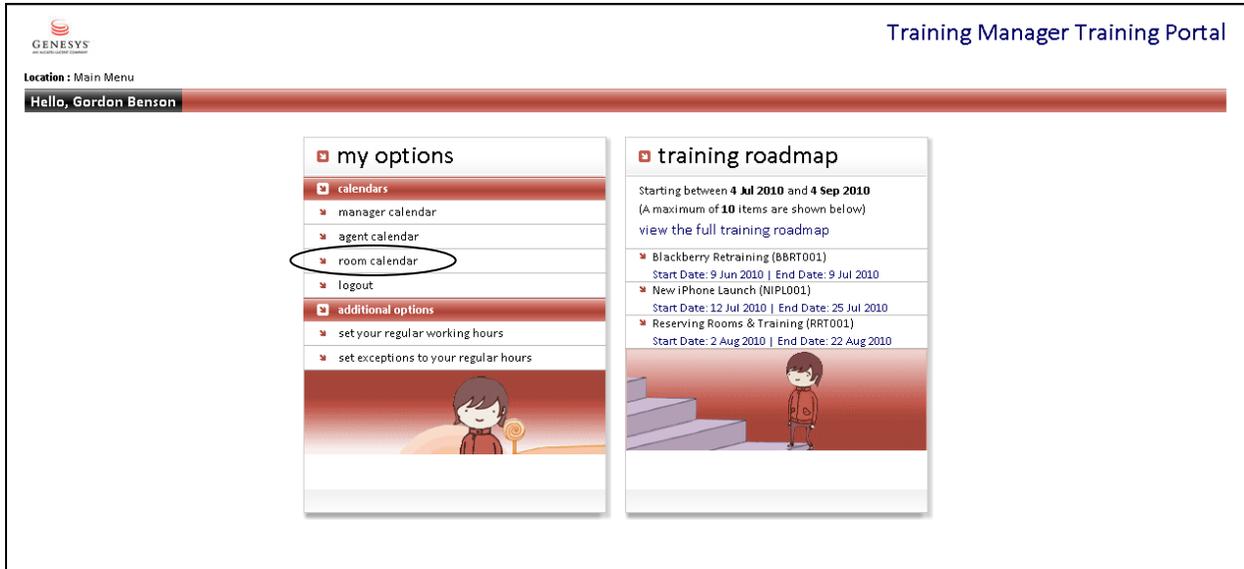
Completion: Completed

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

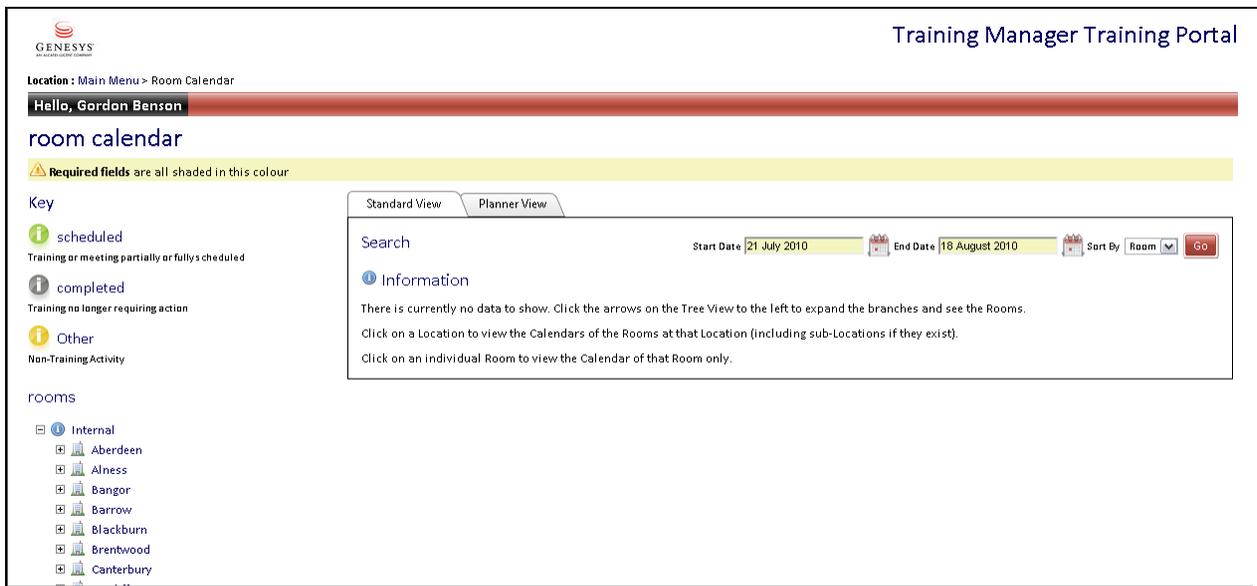
This option allows the manager to view all of the teams scheduled activity. The information is presented in a similar view to the example above, listing all of the scheduled training activity down the right hand side.

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.

GENESYS
Training Manager Training Portal

Location: Main Menu > Room Calendar

Hello, Gordon Benson

room 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

rooms

- Internal
 - Aberdeen
 - B&E Aberdeen 1
 - B&E Aberdeen 2
 - SERVICEINGMT Aberdeen 1
 - Alness
 - Bangor
 - Barrow

Standard View | Planner View

Search

Start Date: 21 July 2010 | End Date: 18 August 2010 | Sort By: Room | Go

Information

There is currently no data to show. Click the arrows on the Tree View to the left to expand the branches and see the Rooms.

Click on a Location to view the Calendars of the Rooms at that Location (including sub-Locations if they exist).

Click on an individual Room to view the Calendar of that Room only.

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.

GENESYS
Training Manager Training Portal

Location: Main Menu > Room Calendar

Hello, Gordon Benson

room 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

rooms

- Internal
 - Aberdeen
 - Alness
 - Bangor
 - Barrow
 - Blackburn
 - Brentwood
 - Canterbury

Standard View | Planner View

Search

Start Date: 21 July 2010 | End Date: 18 August 2010 | Sort By: Room | Go

B&E Warrington 5

Friday, 23 July 2010

- 13:30 - 14:30** New iPhone Launch (NIPLO01) - Bent 1 with Janice McCourt
Attendees: 10. Max. Room Seating: 11

CSALES Warrington 4

Wednesday, 21 July 2010

- 11:00 - 12:00** New iPhone Launch (NIPLO01) - Bent 1 with Janice McCourt
Attendees: 6. Max. Room Seating: 11
- 15:45 - 16:45** New iPhone Launch (NIPLO01) - Bent 1 with David Hill
Attendees: 10. Max. Room Seating: 11

Thursday, 22 July 2010

- 13:30 - 14:30** New iPhone Launch (NIPLO01) - Bent 1 with Joe Thomas

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

The screenshot displays the Genesys Training Manager Training Portal. At the top, the Genesys logo is on the left, and the page title "Training Manager Training Portal" is on the right. Below the logo, the location is "Main Menu > Room Calendar" and the user is greeted with "Hello, Gordon Benson". The main heading is "room calendar". A yellow banner states "Required fields are all shaded in this colour".

On the left, there is a "Key" section with three items:

- scheduled**: Training or meeting partially or fully scheduled
- completed**: Training no longer requiring action
- Other**: Non-Training Activity

 Below this is a "rooms" section with a tree view:

- Internal
 - Aberdeen
 - Alness
 - Bangor
 - Barrow
 - Blackburn
 - Brenwood
 - Canterbury

The main content area shows a calendar for "Friday, 23 July 2010". A search bar is at the top with "Start Date" (21 July 2010) and "End Date" (18 August 2010). A red bar indicates the current room is "B&E Warrington 5". A green bar represents a training session from 13:30 to 14:30: "New iPhone Launch (NIPL001) - Event 1 with Janice McCourt. Attendees: 10. Max. Room Seating: 11".

The details for this session are shown in a pop-up window:

- Training Request**: New iPhone Launch (NIPL001)
- Room**: B&E Warrington 5
- Training Plan**: Training Plan 1
- Trainer**: Janice McCourt
- Training Plan Event**: Event 1
- Attendees Listed Below**:

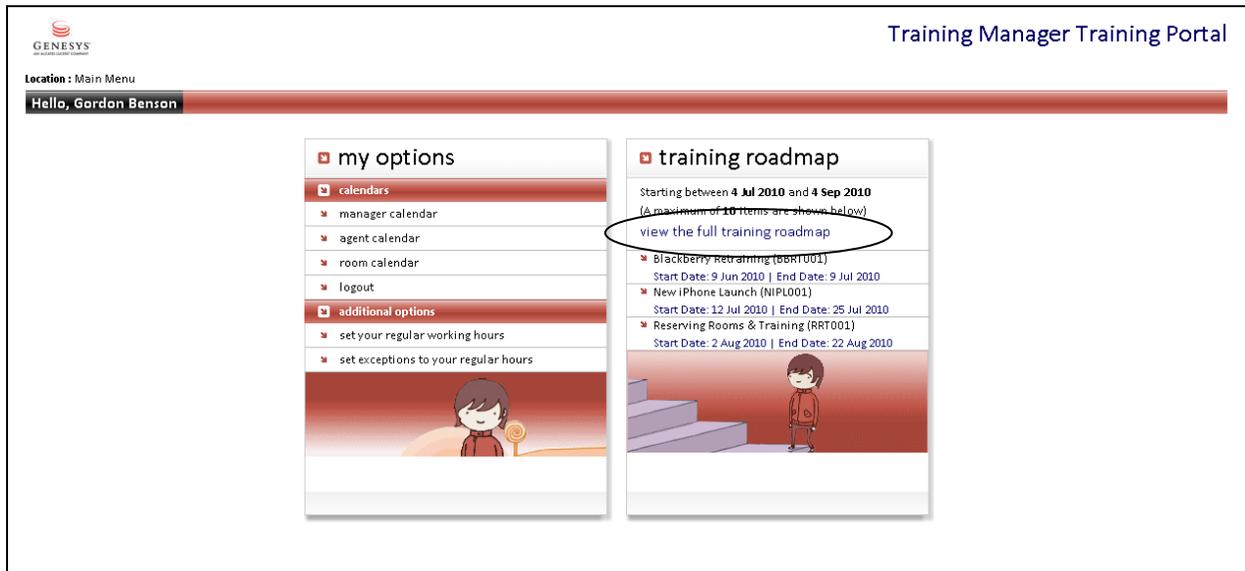
The attendees are listed in a table:

Employee ID	First Name	Last Name
U_8250_Simulator	Abel	Penunuri
U_8241_Simulator	Diana	Olson
HDunn	Henry	Dunn

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.



The screenshot displays the Training Manager Training Portal interface. At the top left is the GENESYS logo. The top right corner shows the page title "Training Manager Training Portal". Below the logo, the location is indicated as "Main Menu" and the user is greeted with "Hello, Gordon Benson".

The main content area is divided into two columns. The left column, titled "my options", contains a list of menu items: "calendars" (with sub-items: manager calendar, agent calendar, room calendar, logout), "additional options" (with sub-items: set your regular working hours, set exceptions to your regular hours), and a cartoon illustration of a person holding a medal. The right column, titled "training roadmap", displays training activities. It starts with a summary: "Starting between 4 Jul 2010 and 4 Sep 2010 (A maximum of 10 items are shown below)". A link "view the full training roadmap" is circled in red. Below this are three training items:

- Blackberry Retraining (BBRT001)
Start Date: 9 Jun 2010 | End Date: 9 Jul 2010
- New iPhone Launch (NIPLO01)
Start Date: 12 Jul 2010 | End Date: 25 Jul 2010
- Reserving Rooms & Training (RRT001)
Start Date: 2 Aug 2010 | End Date: 22 Aug 2010

At the bottom of the right column is a cartoon illustration of a person standing on a set of stairs.

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.

The screenshot shows the 'Training Manager Training Portal' interface. At the top right, it says 'Training Manager Training Portal'. Below the header, there is a navigation breadcrumb 'Location: Main Menu > Training Roadmap' and a personalized greeting 'Hello, Gordon Benson'. The main heading is 'training roadmap'. A yellow banner below the heading states 'Required fields are all shaded in this colour'. On the left, there is a 'Key' section with the instruction 'Click any status below to filter'. The key includes: 'i Unscheduled (Training awaiting scheduling)', 'i scheduled (Training or meeting partially or fully scheduled)', and 'i completed (Training no longer requiring action)'. A 'Show All' link is at the bottom of the key. On the right, there is a filter section with 'Start Date' (04 July 2010), 'End Date' (04 September 2010), and a 'Sort By' dropdown menu set to 'Date', with a 'Go' button. Below the filters, three training sessions are listed in colored bars: 'Blackberry Retraining (BBRT001)' (orange) with start date 'Wednesday, 9 June 2010', 'New iPhone Launch (NIPL001)' (green) with start date 'Monday, 12 July 2010', and 'Reserving Rooms & Training (RRT001)' (orange) with start date 'Monday, 2 August 2010'. A large curly bracket on the left side of the sessions indicates that the key applies to these items.

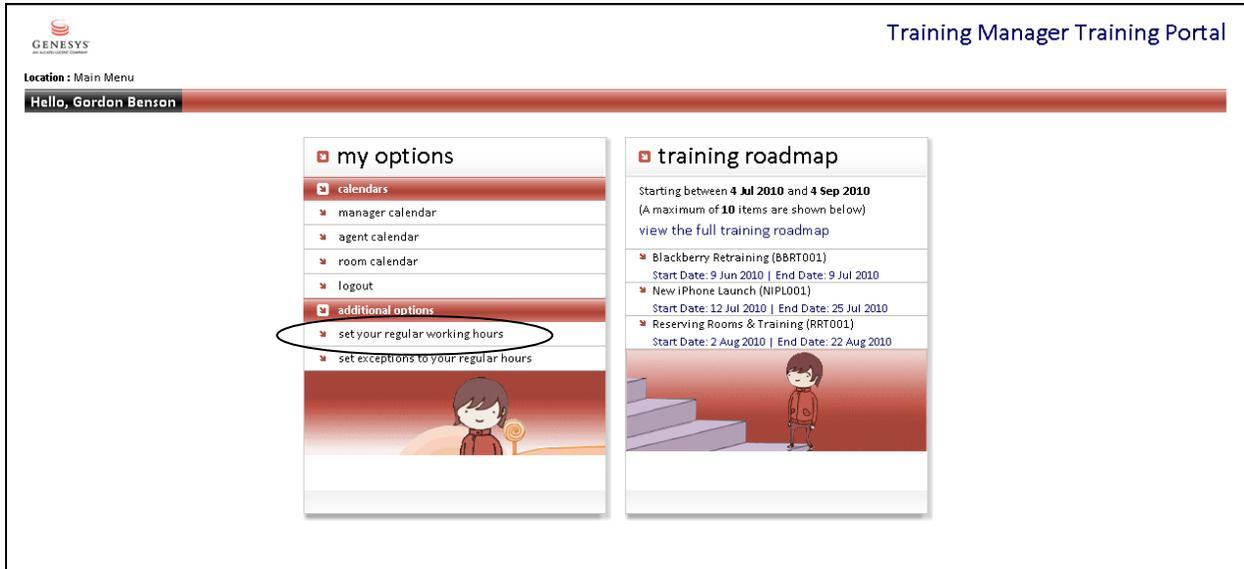
Click on the training session to reveal any additional details, such as Objectives or Additional Notes. The training sessions can also be filtered using the 'sort by' pull down box.

This screenshot shows the same 'Training Manager Training Portal' interface, but with the 'Blackberry Retraining (BBRT001)' session selected. The 'Sort By' dropdown menu is circled in red. The selected session's details are expanded, showing 'Objectives: Supporting training based on skill gaps identified' and 'Additional Notes: This training is required across all areas impacted by the scheduled marketing activity'. The other sessions remain visible below. A black arrow points from the 'Blackberry Retraining (BBRT001)' session bar to its expanded details.

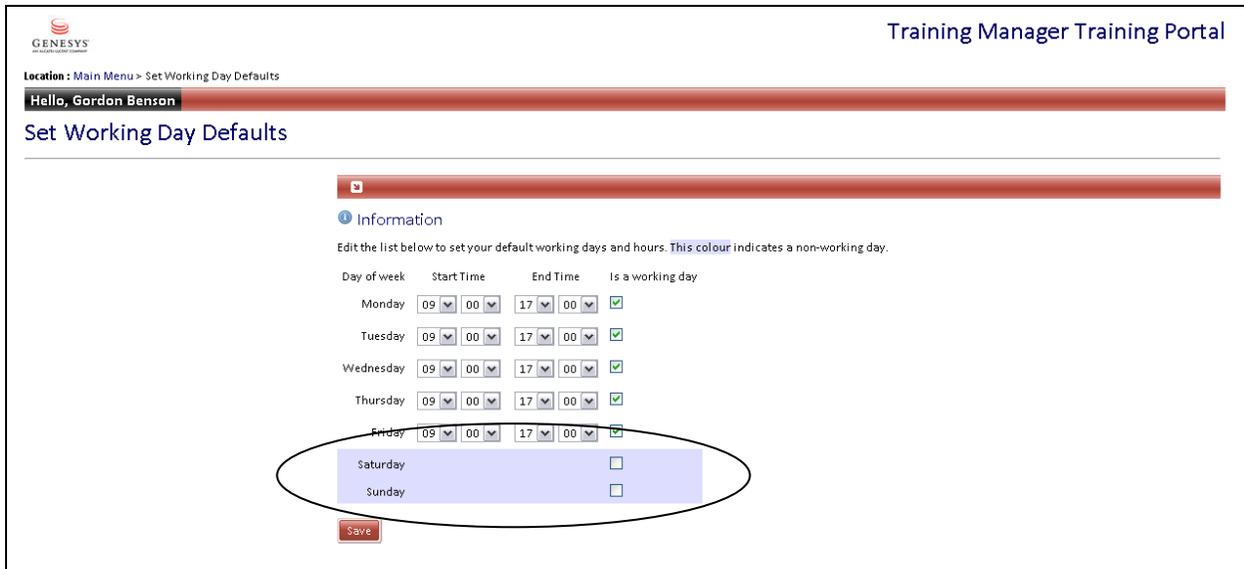
Set Working Day Defaults

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'.

GENESYS
Location: Main Menu > Set Working Day Defaults
Hello, Gordon Benson
Set Working Day Defaults
Training Manager Training Portal

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Information

Edit the list below to set your default working days and hours. This colour indicates a non-working day.

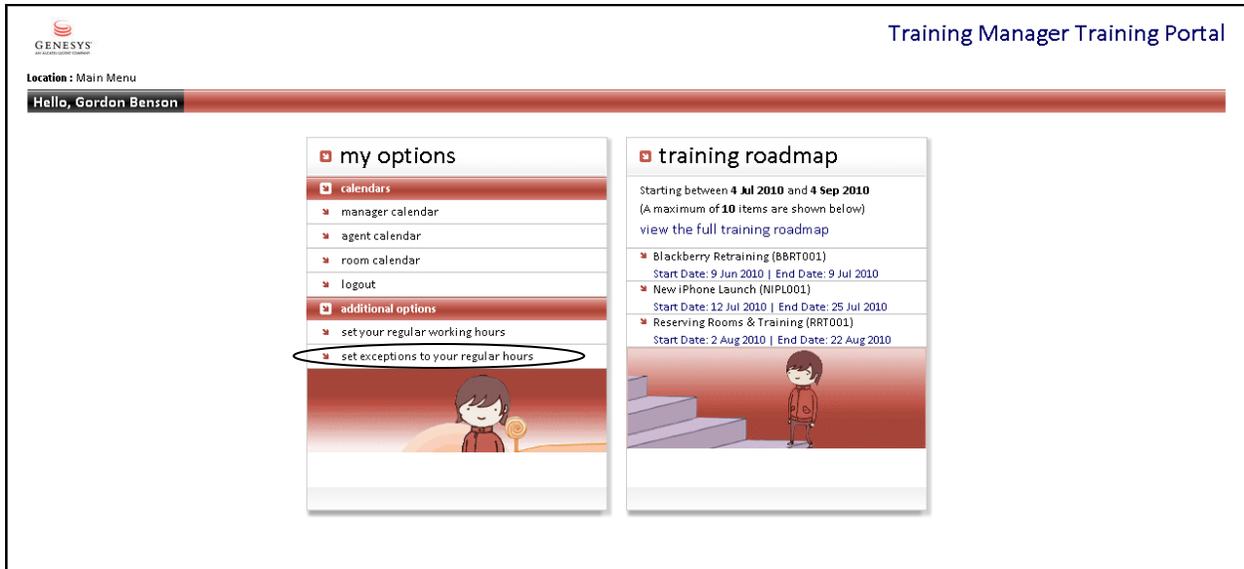
Day of week	Time	End Time	Is a working day
Monday	09	17	<input checked="" type="checkbox"/>
Tuesday	09	17	<input checked="" type="checkbox"/>
Wednesday	09	17	<input checked="" type="checkbox"/>
Thursday	09	17	<input checked="" type="checkbox"/>
Friday	09	17	<input checked="" type="checkbox"/>
Saturday			<input type="checkbox"/>
Sunday			<input type="checkbox"/>

Save

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.

GENESYS
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Training Manager Training Portal

Location: Main Menu > Set Working Days

Hello, Gordon Benson

Set Working Days

Note
Please do not use this form to define periods of scheduled absence (e.g. Holidays, Training Days) where you would otherwise be working.
This form is for specifying UNPAID, NON-WORKING time only.

Information
Edit the list below to set your working days and hours. This colour indicates a non-working day.

Month/Year: August 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	Is a working day
Sun 1	<input checked="" type="checkbox"/>			<input type="checkbox"/>	Tue 17	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Mon 2	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>	Wed 18	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Tue 3	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>	Thu 19	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Wed 4	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>	Fri 20	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Thu 5	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>	Sat 21	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Fri 6	<input type="checkbox"/>	11:00	19:00	<input checked="" type="checkbox"/>	Sun 22	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Sat 7	<input checked="" type="checkbox"/>			<input type="checkbox"/>	Mon 23	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>

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.

silverlining
MULTISERVICES

CS Training Schedule Information

Location: Main Menu > Set Working Days

Hello, Gordon Benson

Set Working Days

Note
Please do not use this form to define periods of scheduled absence (e.g. Holidays, Training Days) where you would otherwise be working.
This form is for specifying UNPAID, NON-WORKING time only.

Information
Edit the list below to set your working days and hours. This colour indicates a non-working day.

Month/Year: August 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	Is a working day
Thu 1	<input checked="" type="checkbox"/>	09:00	18:00	<input checked="" type="checkbox"/>	Sat 17	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Fri 2	<input type="checkbox"/>	09:00	18:00	<input checked="" type="checkbox"/>	Sun 18	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Sat 3	<input checked="" type="checkbox"/>			<input type="checkbox"/>	Mon 19	<input checked="" type="checkbox"/>	09:00	18:00	<input checked="" type="checkbox"/>
Sun 4	<input checked="" type="checkbox"/>			<input type="checkbox"/>	Tue 20	<input checked="" type="checkbox"/>	09:00	18:00	<input checked="" type="checkbox"/>
Mon 5	<input checked="" type="checkbox"/>	09:00	18:00	<input checked="" type="checkbox"/>	Wed 21	<input checked="" type="checkbox"/>	09:00	18:00	<input checked="" type="checkbox"/>
Tue 6	<input checked="" type="checkbox"/>	09:00	18:00	<input checked="" type="checkbox"/>	Thu 22	<input checked="" type="checkbox"/>	09:00	18:00	<input checked="" type="checkbox"/>

Deselect the date required