

Genesys Training Manager 8.0

Web Portal Trainer Guide

The information contained herein is proprietary and confidential and cannot be disclosed or duplicated without the prior written consent of Genesys Telecommunications Laboratories, Inc.

Copyright © 2009–2011 Genesys Telecommunications Laboratories, Inc. All rights reserved.

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_trainer_03-2011_v8.0.256.00



Table of Contents

Preface	5
About Genesys Training Manager	5
Intended Audience	6
Making Comments on This Document	6
Contacting Genesys Technical Support	7
Related Documentation Resources	8
Document Conventions	9
Document Version Number	9
Screen Captures Used in This Document	9
Type Styles	10
Web Portal Trainer	
The Trainer	13
My Options	15
Trainer Calendar	15
Calendar Report View	
Room Calendar	23
Training Roadmap	25

View Other Trainer's Calendar	27
Set Your Regular Working Hours	30



Chapter

Preface

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

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 <u>page 9</u>.

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 browserbased 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 "moppedup" 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	<u>support@genesyslab.com</u>				
Europe, Middle East, and Africa	+44-(0)-1276-45-7002	<u>support@genesyslab.co.uk</u>				
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)	<u>support@genesyslab.com.au</u>				
Japan	+81-3-6361-8950	<u>support@genesyslab.co.jp</u>				
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 Web Portal Trainer

The Trainer

The Trainer has access to:

- Trainer Calendar
- Room Calendar
- Training roadmap
- Logout
- View other trainer's Calendar
- Set regular working hours

When the Trainer logs on to the system they are presented with a similar screen as per the example below.

To return to the Home Screen select Main Menu at any time.

GENESYS Locating: Main Menu Hello, David Hill		Tr	raining Manager Training Portal
	my options	training roadmap	
	calendars	Starting between 4 Jul 2010 and 4 Sep 2010	
	🛎 trainer calendar	(A maximum of 10 items are shown below)	
	🗕 room calendar	view the full training roadmap	
	Iogout	Blackberry Retraining (BBRT001)	
	additional options	Start Date: 9 Jun 2010 End Date: 9 Jul 2010	_
		New iPhone Launch (NIPL001) Start Date: 12 Jul 2010 End Date: 25 Jul 2010	
	 view other trainer's calendars 	 Reserving Rooms & Training (RRT001) 	-
	set your regular working hours	Start Date: 2 Aug 2010 End Date: 22 Aug 2010	

The screen is separated into two parts, 'my options' in the left hand window and the 'training roadmap' detail in the right hand window. Obviously training details will only be visible in the portal if training sessions have been scheduled in Training Manager.

My Options

Trainer Calendar

By selecting 'Trainer Calendar' this displays any activity that the Trainer has been scheduled for within the date range. This may include team meetings and other meetings, and by default the Standard View is always presented, as per the example below.

Some information about the session is visible in the training session bar, such as date, time, training session and room, if applicable.

GENESYS			Training Mana	ager Training Portal
Location : Main Menu > Trainer Calendar				
Hello, David Hill			Date range	
trainer calendar			Dute runge	
A Required fields are all shaded in this colour	\frown			
Key	Standard View Planner View			
👔 scheduled Training or meeting act tally or fully scheduled	Search	Start Date 21 July 2010	End Date 18 August 2010	Sort By Trainer 💌 😡
Completed Training no longer requiring action	David Hill Wednesday, 21 July 2010			
Other Non-Training Activity	15:45 - 16:45 NewiPhone Launch (MPL001) - 6 Attendes: 10. Max. Room Seati			

The status of the training activity is color coded in line with the status indicators.

By clicking on one of the training session bars this expands to reveal the scheduled attendees together with any additional details.

Once the training session has commenced the Trainer can update the attendance register by selecting 'Attendance Register.

Scheduled Training or meeting partially or fully scheduled	Search	Sta	rt Date 21 July 2010	End Date 18 August 2010	Sort By Trainer 💌 🔽 Go
in completed Training no longer requiring action	David Hill Wednesday, 21 July 2010				
0 Other Non-Training Activity		ne Launch (NIPLOO1) - Event 1 i 1: 10. Max. Room Seating: 11	nCSALESWarrington4		
	Straining Request : New if	Phone Launch (NIPL001)	🗐 Room :	CSALES Warrington 4	
	🔲 Training Plan : Traini	ng Plan 1	🚨 Trainer :	David Hill	
	👒 Training Plan Event : Event	1	Attendees Listed Below :		
(Details Public Description				
	Employee ID First Name	Last Name			
	U_8306_Simulator Amy	Jay			
	U_8349_Simulator Amy	Reicher			
	U_8242_Simulator Elenison	Olson			
)	U_6008_Simulator Ian	Johnson			
)	U_8332_Simulator Linda	Sweeney			
	U_8244_Simulator Lori	Osborn			
	U_8237_Simulator Nancy	Nelson			
	U_8246_Simulator Rachel U 8273 Simulator Roberto	Padawer Richards			
	U_8273_SIMulator Roberto U_6007_Simulator Shane	Richards Carlson			
	0_0007_smidlator_share	Carison			
	Attendance Register				
	No Attendance/Completion Reco	rded			

The attendance register presented will be similar to the example below and is updated with who has attended and completed training.

There are text boxes for any comments to be stored against the training session and this information will be visible in the report available from Training Manager.

Use either the 'All' or 'None' to record all of the delegates as attending or not or use the individual drop down boxes.

🚍 Training Manager Training Portal - [Attendance Register]	Training Manager Training Portal - [Attendance Register]						
attendance register							
Image: Training Request: New IPhone Launch (NIPL001) Room: CSALES Warrington 4 Image: Training Plan: Training Plan 1 Training: David Hill Image: Training Plan Event: Event 1 Image: David Hill 21 Jul 2010 15:45 - 21 Jul 2010 16:45 Options: Save: Cancel Attended: Attended: Cear: Completed: All: None: Cear:							
First Name Last Name Employee ID Attended Completed							
💩 Amy Jay U_8306_Simulator - 💌 🚽 - 🕥 Comments	Update all of the delegates						
💩 Amy Reicher U_8349_Simulator - 💌 - 💌 Comments	at once as attending or not						
🚨 Elenison Olson U_8242_Simulator - 💌 - 💌 Comments	or use the individual drop						
🚨 Ian Johnson U_6008_Simulator - 💌 - 💌 Comments	down boxes.						
🚨 Linda Sweeney U_8332_Simulator - 💌 - 💌 Comments	uown uoxes.						
S Lori Osborn U_8244_Simulator - 💌 - 💌 Comments							
🚨 Nancy Nelson U_8237_Simulator - 💌 - 💌 Comments							
🚨 Rachel Padawer U_8246_Simulator - 💌 - 💌 Comments							
🚨 Roberto Richards U_8273_\$imulator - 💌 - 💌 Comments							
🚨 Shane Carlson U_6007_Simulator . 🔽 . 🔽 Comments							

Select 'Save' once completed and this will return back to the main menu. This information automatically updates Training Manager to track attendance and training completion. Any agents who do not attend and complete the scheduled training can then be rescheduled to take the training again if required.

Main Menu can be selected at any time to return to the main home page.

Calendar Report View

There is the option to view scheduled activity as a calendar view as per the example below. Select the Planner View option and view the information by Day, Week or Month.

	Training Manager Training Portal
Location : Main Menu > Trainer Calendar	
Hello, David Hill	
trainer calendar	
A Required fields are all shaded in this colour	
Кеу	Standard View Planner View
Uncategorised	Click to refresh the calendar if you have changed the content to view
Holiday	✓ > today ▼ 15 July 2010 Day Week Month
Management Meeting	David Hill
Meeting	
Training Session	9 ° M Training Session
	10 _{su}
	11ºm
	12.00

Trainers are now able to enter their unavailable time directly through their web portal by right clicking in the planner window and selecting 'New entry'.

There is also the option to 'Go to today' and view the planner view in a 24 hour view.

GENESYS					Traini	ing Manage	r Training Portal
Location : Main Menu > Trainer Calendar							
Hello, David Hill							
trainer calendar							
A Required fields are all shaded in this colour							
Key	Standard View	Planner View					
Uncategorised				Click to	refresh the calendar if	you have changed the	content to view Refresh
Holiday	< > today	- Septer	nber 2010	_	_	_	Day Week Month
Management Meeting				David Hill			
Meeting	Mon 30	Tue 31	Wed 01 Sep	Thu 2	Fri 3	Sat 4	Sun 5
Training Session							
	6	7	8	9	10	11	12
		(New entry				
	13	14	Go to today	16	17	18	19
			Show 24 hours				
	20	21	22	23	24	25	26

After selecting 'New entry' the 'New Trainer Diary Entry' template is presented.

	New Trainer C	ilendar Entry		_	_	Traip	ing Manag	ger Training Porta
Location : Main Menu > Trainer Calendar	Subje	ct Holiday						
Hello, David Hill	Start tin	ne 07/09/2010	▼ End time 07	/09/2010 🔻 🔽 🗸	All day			
trainer calendar	Catego	y:	•					
A Required fields are all shaded in this colou	Descriptio	n - Holiday						
Key			ent Meeting					
Uncategorised	Recurren	:e					ave changed	the content to view Refresh
Holiday						Save Cance		Day Week Month
Management Meeting		Mon	Tue	Wed	Thu	Fri	Sat	Sun
Meeting	30		31	01 Sep	2	3	4	5
Training Session								
	6		7	8	9	10	11	12
	13		14	15	16	17	18	19
	20		21	22	23	24	25	26

Enter the subject and in this example a holiday is being entered. If the entry is a single entry then complete the details in full, remembering that if 24 hours is selected, this will limit the time that the trainer is available on the following day to 11:00.

The color coding for the entry is available under 'key'.

GENESYS'	New Trainer Ca	ilendar Entry				Trainin	Manager	Training Portal
Location : Main Menu > Trainer Calendar Hello, David Hill trainer calendar Required fields are all shaded in this colou Key Uncategorised	Subje Start tirr Categor	ct Holiday ne 07/09/2010 • y: Holiday		3/2010 ▼ VAII	day			
Holiday Management Meeting	Recurrent	Mon	Tue 31	Wed	Thu 2	Save Cancel		ntent to view Refresh Day Week Month Sun
Meeting Training Session	6		7	8	9	10	11	12
	13		14	15	16	17	18	19
	20		21	22	23	24	25	26

If the entry is for multiple days then use the 'recurrence' option which will give each day its own individual entry in the 'Standard view'.

S	Training Po	ortal
GENESYS'	New Trainer Calendar Entry	
Location : Main Menu > Trainer Calendar	Subject Holiday	
Hello, David Hill	Start time 07/09/2010 End time 07/09/2010 All day	
trainer calendar	Category: Holiday	
A Required fields are all shaded in this colou	Description	
Кеу		
	(< September 2010 >) >	
Uncategorised	C C	h
Holiday	1 2 3 4 Day Week Month	
Management Meeting	O Hourly ● Every 1 ↓ day(s) 5 6 7 8 9 10 11 ● Daily <	
Meeting	O Daily Every weekday 12 13 14 15 16 17 18 Sat Sun	
Meeung	Monthly 19 20 21 22 23 24 25	
Training Session	Vearly 26 27 28 29 30	
	No end date ○ End after ○ occurrences ● End by 09/09/2010 ▼	
	Save Cancel 8 19	
	20 21 22 23 24 25 26	

By selecting 'recurrence' additional options are then presented.

In this example the holiday is being entered for 3 days and therefore the option 'End after' has been selected with an end date of 09/09/2010.

GENESYS	Edit Trainer Calendar Entry	Manager Training Portal
Location : Main Menu > Trainer Calendar Hello, David Hill trainer calendar Required fields are all shaded in this colou	Subject Holiday Start time 07/09/2010 V 08:00 V End time 07/09/2010 V 17:00 V All day Category: Holiday V Description	
Key Uncategorised Holiday Management Meeting Meeting Training Session	✓ Recurrence ○ Hourly ③ Daily ○ Weekly ○ Every weekday ○ Yearly	ave changed the content to view Refresh Day Week Month Sat Sun S
	No end date End after	Cancel 8 19 25 26

The holiday will now appear in the planner view with the relevant color.

Click on 'Refresh' to update the web portal view to include any new entries.



To make any changes to events that have been previously entered directly in the web portal, right click on the event and the option to edit or delete the entry is presented.

Note: Scheduled training activity cannot be amended or cancelled in the web portal.



Genesys Training Manager — Web Portal Trainer Guide

Select 'Edit entry' and the option to edit the occurrence or the series is then available.

GENESYS Markatorisated reserve	Training Mana	ger Training Porta
Location : Main Menu > Trainer Calendar		
Hello, David Hill		
trainer calendar		
🛆 Required fields are all shaded in this colour		
Кеу	Standard View Planner View	
Uncategorised	Click to refresh the calendar if you have change	d the content to view Refresh
Holiday	✓ > today ▼ September 2010	Day Week Month
Management Meeting	David Hill Mon Tue Wed Thu Fri Sat	Sun
Meeting	30 31 01 Sep 2 3 4	5
Training Session	6 7 Editing a recurring appointment	12
	13 14 OEdit only this occurrence.	19
	0K Cancel 20 21	26

By selecting 'Edit only this occurrence', this will allow editing on the date selected.

By selecting 'Edit the series' this will present the original entry for amending with the recurrence option selected.

By using the recurrence option each individual date will appear as an individual entry in the 'Standard View', as per the example below.

GENESYS malatical titlate		Training Manager Training Portal
Location : Main Menu > Trainer Calendar		
Hello, David Hill		
trainer calendar		
A Required fields are all shaded in this colour		
Кеу	Standard View Planner View	
 scheduled Training or meeting partially or fully scheduled 	Search	Start Date 01 September 2010 🗮 End Date 24 September 2010 🗮 Sort By Trainer 💌 👩
Completed	David Hill	
Training no longer requiring action	Tuesday, 7 September 2010	
0 Other Non-Training Activity	08:00 - 17:00 Holiday	
	Wednesday, 8 September 2010	
	08:00 - 17:00 Holiday	
	Thursday, 9 September 2010	
	08:00 - 17:00 Holiday	
	-	
	Wednesday, 8 September 2010 08:00 - 17:00 Holiday Thursday, 9 September 2010	

Room Calendar

GENESYS	Training Manager Training Portal
Location : Main Menu	
Hello, David Hill	
my options	training roadmap
Calendars	Starting between 4 Jul 2010 and 4 Sep 2010
* trainer calendar	(A maximum of 10 items are shown below)
v room calendar	view the full training roadmap
a logout	Blackberry Retraining (BBRT001)
additional options	Start Date: 9 Jun 2010 End Date: 9 Jul 2010
view other trainer's calendars	New iPhone Launch (NIPL001) Start Date: 12 Jul 2010 End Date: 25 Jul 2010
set your regular working hours	Reserving Rooms & Training (RRT001)
 Set your regular working hours 	Start Date: 2 Aug 2010 End Date: 22 Aug 2010

To view the room activity select 'room diary' in the main menu window under 'my options'.

By clicking on the location name, this displays all of the training room activity for that location filtered by date, time range and room name.

In the example below Warrington has been selected and all of the activity by individual room, within the date range is then visible.

GENESYS A automutation tomaw		Training Manager Training Porta
Location : Main Menu > Room Calendar		
Hello, David Hill		
room calendar		
A Required fields are all shaded in this colour		
Кеу	Standard View Planner View	
scheduled Training or meeting partially or fullys cheduled	Search Start Date 21 July 201	2010 🗮 End Date 18 August 2010 🗮 Sort By Room 💉 60
🕕 completed	B&E Warrington 5	
Training no longer requiring action	Friday, 23 July 2010	
0 Other Non-Training Activity	13:30 - 14:30 NewiPhone Launch (NIPLOO1) - Event 1 with Janice McCourt Attendees: 10. Max. Room Seating: 11	t
rooms	SALES Warrington 4	
🗆 🕕 Internal	Wednesday, 21 July 2010	
🗉 🚊 Aberdeen	11:00 - 12:00 NewiPhone Launch (NIPL001) - Event 1 with Janice McCourt Attendees: 6. Max. Room Seating: 11	rt
🗄 🛄 Alness 🗄 🛄 Bangor	Attendeet, o. max. nadin beating, 11	
E 🛄 Barrow	15:45 - 16:45 NewiPhone Launch (NIPL001) - Event 1 with David Hill Attendees: 10. Max. Room Seating: 11	
E 🚊 Blackburn E 🚊 Brentwood	Thursday, 22 July 2010	
E 📃 Canterbury	12:30 - 13:30 NewiPhone Launch (NIPL001) - Event 1 with Joe Thomas NewiPhone Launch (NIPL001) - Event 1 with Joe Thomas	

Select the training session to expand and view the training details. This will also include the scheduled attendees.

GENESYS' Manufaulutific Conner			Training Manage	er Training Portal
Location : Main Menu≻ Room Calendar Hello, David Hill				
room calendar				
A Required fields are all shaded in this colour				
Кеу	Standard View Planner View			
🕕 scheduled Training or meeting partially or fully scheduled 🛛 🔨	Search st	art Date 21 July 2010	End Date 18 August 2010	Sort By Room 💌 🔽
Completed Training no longer requiring action	 B&E Warrington 5 Friday 23 July 2010 			
0 Other Non-Training Activity	13:30 14:30 New IPhone Launch (NIPLO01) - Event 1 v Attendees : 10. Max. Room Seating: 11	with Janice McCourt		
rooms	Straining Request : New iPhone Launch (NIPLOO1)	_	B&E Warrington 5	
🗆 🕕 Internal	Training Plan : Training Plan 1	🚨 Trainer :	Janice McCourt	
🗉 🛄 Aberdeen	😘 Training Plan Event : Event 1	Attendees Listed Below :		
⊞ 🛄 Alness ⊞ 🛄 Bangor	Details : Public Description			
 	Employee ID First Name Last Name U_8250_Simulator Abel Penunuri U_8241_Simulator Diana Olson			
	HDunn Henry Dunn			

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.

GENESYS		Train	ing Manager Training Portal
2 6 3 8	my options calendars agent calendar logout	training roadmap Starting between 4 Mi 2010 and 4 Sep 2010 (A maximum of 10 Itema are shown below) view the full training roadmap Blactberry Retraining (B&R1001) 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 (RR1001) Start Date: 2 Jul 2010 End Date: 22 Jul 2010 Start Date: 2 Jul 2010 End Date: 22 Jul 2010	}

The training is color coded based on the status indicators.

GENESYS Mathematical State		Training Manager Training Portal
Location : Main Menu > Training Roadmap		
Hello, David Hill		
training roadmap		
A Required fields are all shaded in this colour		
Кеу		Start Date 04 July 2010 📰 End Date 04 September 2010 📰 Sort By Date 💌 👩
Click any status below to filter	Blackberry Retraining (BBR T001)	Start Date: Wednesday, 9 June 2010
Training awaitings cheduling	New iPhone Launch (NIPL001)	Start Date: Monday, 12 July 2010
Training or meeting partially or fully scheduled	Reserving Rooms & Training (RRT001)	Start Date: Monday, 2 August 2010
Training no longer requiring action	-	

Click on the training session to reveal any additional details , such as Objectives and Additional Notes.

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

GENESYS		Training Manager Training Portal
Location : Main Menu > Training Roadmap Hello, David Hill		
training roadmap		
riangle Required fields are all shaded in this colour		
Key	Start Date 04 July 2010	End Date 04 September 2010 Sort By Date V Go
Clickanystatus below to filter	Blackberry Retraining (BBRT001)	Start Date: Wednesday, 9 June 2010
Training awaitings cheduling	Objectives Supporting training based on skill gaps identified	
Training or meeting partially or fully scheduled	Additional Notes This training is required across all areas impacted by the scheduled marketing activity	
Completed Training no longer requiring action	New iPhone Launch (NIPL001)	Start Date: Monday, 12 July 2010
Show All	Reserving Rooms & Training (RRT001)	Start Date: Monday, 2 August 2010

The training roadmap is available in the right hand window and the latest training activity is listed in the training roadmap window.

Select 'view the training roadmap' to view the training sessions currently scheduled in Training Manager that are associated to the Trainer.

View Other Trainer's Calendar

Trainers have the ability to view other trainer's Calendar by selecting 'view other trainer's Calendar'.



The 'trainer diary' view is then presented and in the 'trainer search', type in any combination of First, Last Name or Employee ID to find the required trainer.

Entering information in the 'trainer search' will bring up a list of trainers to select from.

			Training Manager Training Portal
Location : Main Menu > View Trainer Calendar Hello, David Hill			
trainer calendar			
A Required fields are all shaded in this colour			
Кеу	Standard View Planner View		
 scheduled Training or meeting partially or fully scheduled 	Search	Start Date 21 July 2010	End Date 18 August 2010
completed Training no longer requiring action Other Won-Training Activity	trainer search Type anv combination of First Name, Last Name or Emplo TOU822919 - Wark Argent 701872592 : Gavin Byrne 700657979 : Alyson Bushel 700727016 : Laura Cooper 701349989 : Judi Hall 701034427 : Janice McCourt 802889360 : Tracy Merriman 803251043 : Joe Thomas 12345678 : David Hill trainer_manager : Eddie Talbot	yee ID.	

After selecting the required trainer, amend the date range and click on 'Go'.

GENESYS Multiple land		Training Manager Training Portal			
Location : Main Menu > View Trainer Calendar Hello, David Hill					
trainer calendar					
A Required fields are all shaded in this colour					
Кеу	Standard View Planner View				
Scheduled Training or meeting partially or fully scheduled	Search Start Date 04 May 2	2010 🗮 End Date 18 August 2010 🗮 Sort By Trainer 💌 🔐			
completed Training no longer requiring action Other Non-Training Activity	trainer search Type any combination of First Name, Last Name or Employee ID. 803251043 : Joe Thomas Information				
	There is currently no data to show.				

Any activity associated to the trainer will then be visible.

GENESYS	Training Manager Training Portal				
Location : Main Menu > View Trainer Calendar Hello, David Hill					
trainer calendar					
Required fields are all shaded in this colour					
Кеу	Standard View Planner View				
scheduled Training or meeting partially or fullys cheduled	Search Start Date 04 May 2010 🗮 End Date 16 August 2010 🗮 Sort By Trainer 💌 🙆				
 completed Training no longer requiring action Other Non-Training Activity 	trainer search Type any combination of First Name, Last Name or Employee ID.				
	Wednesday, 5 May 2010 10:00 - 13:00 Scerario Text (SCT001) - Event 1 in CSALES Warrington 6 Attendees: 2. Max. Room Seating: 11 Thursday, 20 May 2010 Scerario Text (SCT001) - Event 1 in CSALES Warrington 6 Attendees: 2. Max. Room Seating: 11 Thursday, 10 June 2010 Scerario Text (SCT001) - Event 1 in CSALES Warrington 6 Attendees: 2. Max. Room Seating: 11				
Ĺ	16:45 - 17:45 NewTariff Launch (MIL003) - Event 1 in CSALES Warrington 4 Attendees: 10. Max. Room Seating: 11				

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



Set Your Regular Working Hours

Trainer working hours are kept up to date in Training Manager by selecting 'set your regular working hours'.



The current default hours that Training Manager will use for scheduling will then be presented. If any amendments have to be made use the drop down list to select the correct times against the appropriate day. This option should not be used for excluding dates and times due to holidays as these are entered as per the instructions in the Trainer Calendar section. The hours entered are then immediately updated in Training Manager and are visible against the trainer.

GENESYS: Maladaudati colawa						Training Manager Training Portal
	00 01 02 03 04 05 07 7 7 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	 tyour d time 00 w 00 w 00 w 00 w 00 w 	Efault working day End Time 18 w 00 w 18 w 00 w 18 w 00 w 17 w 00 w 22 w 00 w	s and hours. Earliest Lunch Start 11 w 00 w 11 w 00 w 11 w 00 w 11 w 00 w 11 w 00 w	Latest Lunch End 14 w 30 w 14 w 30 w	Training Manager Training Portal
		 00 v 00 v 				