Genesys

Genesys Training Manager 8.1.1

Administrator Guide

About Genesys

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

Notice

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Your Responsibility for Your System's Security

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Complete information on ordering and licensing Genesys products can be found in the *Genesys 7 Licensing Guide*.

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Table of Contents

Preface

Welcome to the *Genesys Training Manager Administrator Guide.* This guide is designed to explain the application in user friendly terms and walk through how to administer the application from creating Locations, Trainers and Rooms to scheduling training into Genesys WorkForce Management (WFM).

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

This document is valid only for the 8.1 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 email 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-to-ones automatically in Genesys WorkForce Management (WFM). The training scheduling process can include rooms and trainers or any combination of agent, room, and training. For team meetings and one-to-ones, this automatically includes the manager. A browser-based web portal comes as part of the application, allowing visibility of the scheduled training and meeting activity together with any other details available; for example, reason for the training, room, trainer, and any pre-training work if required. The trainer updates attendance through their online attendance register, which they access directly through their web

portal. This automatically updates Training Manager with who has attended; if there were any non-attendees they can be "mopped up" automatically as part of the scheduling process.

Making Comments on This Document

If you especially like or dislike anything about this document, feel free to email 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, ,see the Contact Information on the Tech Support website. 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.

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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 email 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	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

	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).	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>`

Genesys Training Manager Administrator

Genesys Training Manager

Logging In

Providing that the user has authority to access the application, the Login screen will appear as follows:

Complete the details as required and select OK.

Logging Out

To log out of the application, click File and then Exit or click on the red X in the top right hand corner.

The Genesys Training Manager main menu will be displayed as in the example below.
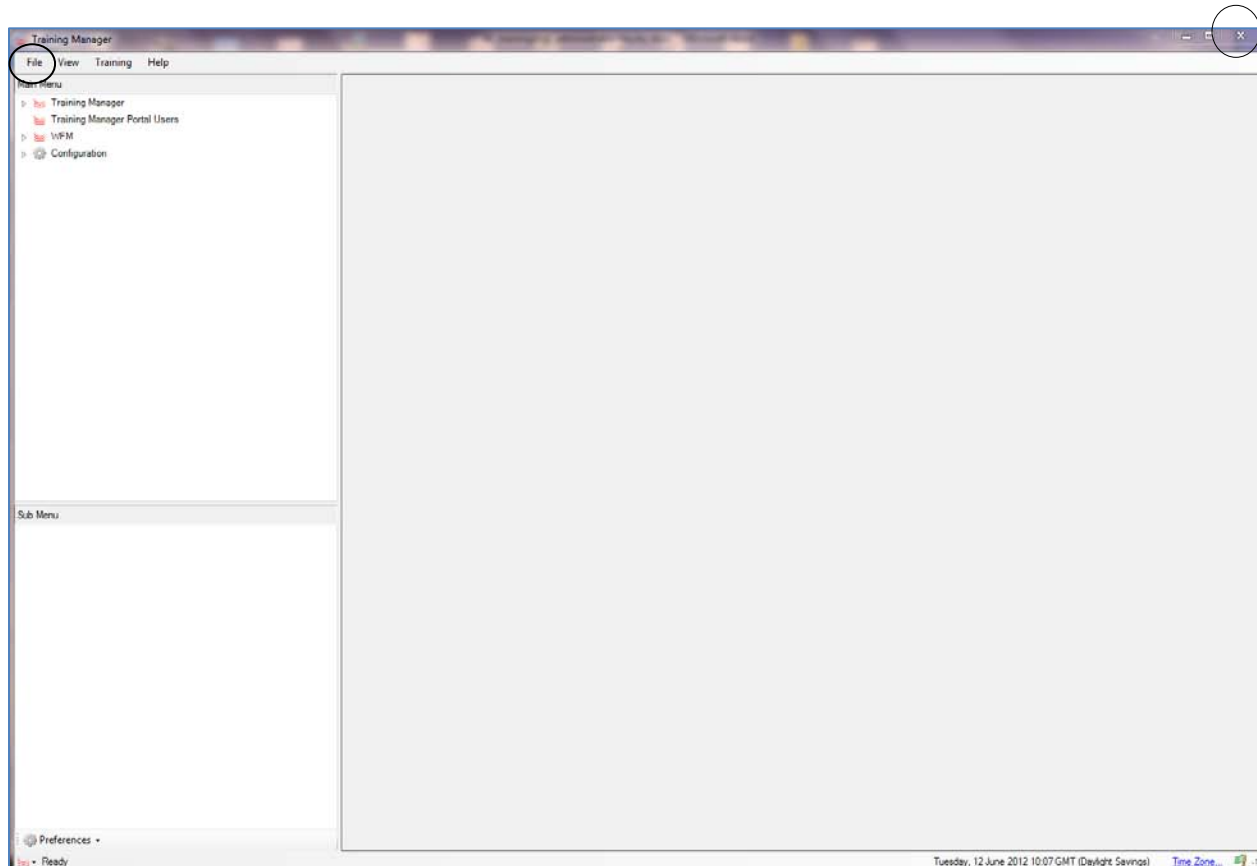
Genesys Training Manager Components Overview

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

1. Training Requests – select this menu option to create a training request.

    o Completion Status / Reports

2. Meetings – select this menu option to create and schedule any meetings or one-to-ones where the team manager is also required.

3. Resources

    o Room Calendar – all room activity will be visible here, from creating an individual manual room booking, to rooms booked as part of the optimized (or manual) scheduling process.

    o Trainer Calendar – as with room booking, all trainer activity will be visible here, from manual holidays and scheduled meetings, to training activity booked as part of the optimized (or manual) scheduling process. Trainers now have the ability to keep their calendar up-to-date directly through their web portal access.

    o Manager Calendar – the Manager Calendar has to be kept up-to-date with working hours and unavailable time for Genesys Training Manager to schedule team meetings. Managers keep their working hours and unavailability up-to-date-through their web portal access.

4. Training Manager Portal – select this menu option to manage access to the web portal. Administrators are created here. Trainer managers, trainers, managers and agents are created automatically; however, trainer managers, trainers, and managers must be granted access to the web portal.

5. WFM – select this menu option to view exceptions directly out of WFM, and to associate teams with managers and locations.

6. Configuration -

   o Training Categories – the different categories used in training activity for example, Trainer Led.

   o Meeting Types - the different types of meetings associated with the specific meeting algorithm, for example, One-to-One, Team Meeting.

   o Booking Categories – distinguish the type of category in the web portal, for example, Holidays. They are also color coded for easy visibility.

   o Selection & Exclusion – record excluded users and the reason e.g. long term absence

   o Resources – locations, trainers and rooms are created, configured, and managed here.

7. Training Manager Portal – select this menu option to manage authentication, branding, and visibility of training schedules in the web portal.

8. Skills Assessor – this component will only be available if Skills Assessor already exists within the organization.

These components are covered in detail in the document.

Configuring Genesys Training Manager

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

- Sites or Business Units.

- Agents, Agent Groups, Scheduling Pots, Skills (including proficiency levels), and Activities.

- Agent WFM schedules.

Time Zone

When first accessing Training Manager, check that the correct time zone has been selected as this will affect the scheduling activity.

Click on `Time Zone` in the bottom right hand corner and a separate window will be presented to use the drop-down box to select your working time zone. This only needs to be done in the first instance or if your working time zone changes.


Select `Time Zone` to update your working time zone and then select the correct time zone from the drop-down box.
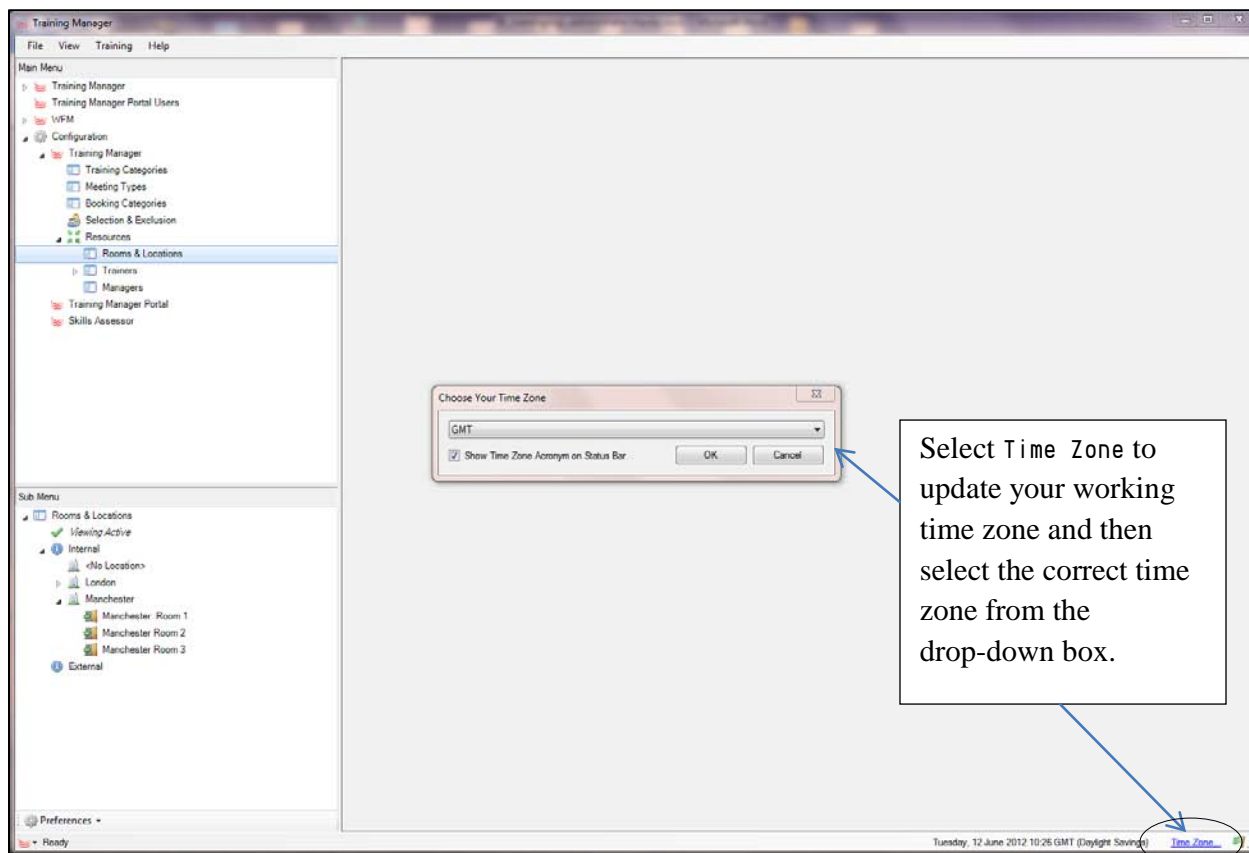
Creating Locations

Genesys Training Manager must be configured to identify the location that agents, trainers, and rooms are associated to. Training Manager needs this information to schedule training activity. The locations therefore must first be created in Genesys Training Manager.

To create a new location, expand `Configuration`, from the list under `Main Menu`. Expand `Training Manager`, then `Resources` and then click on `Rooms & Locations`.
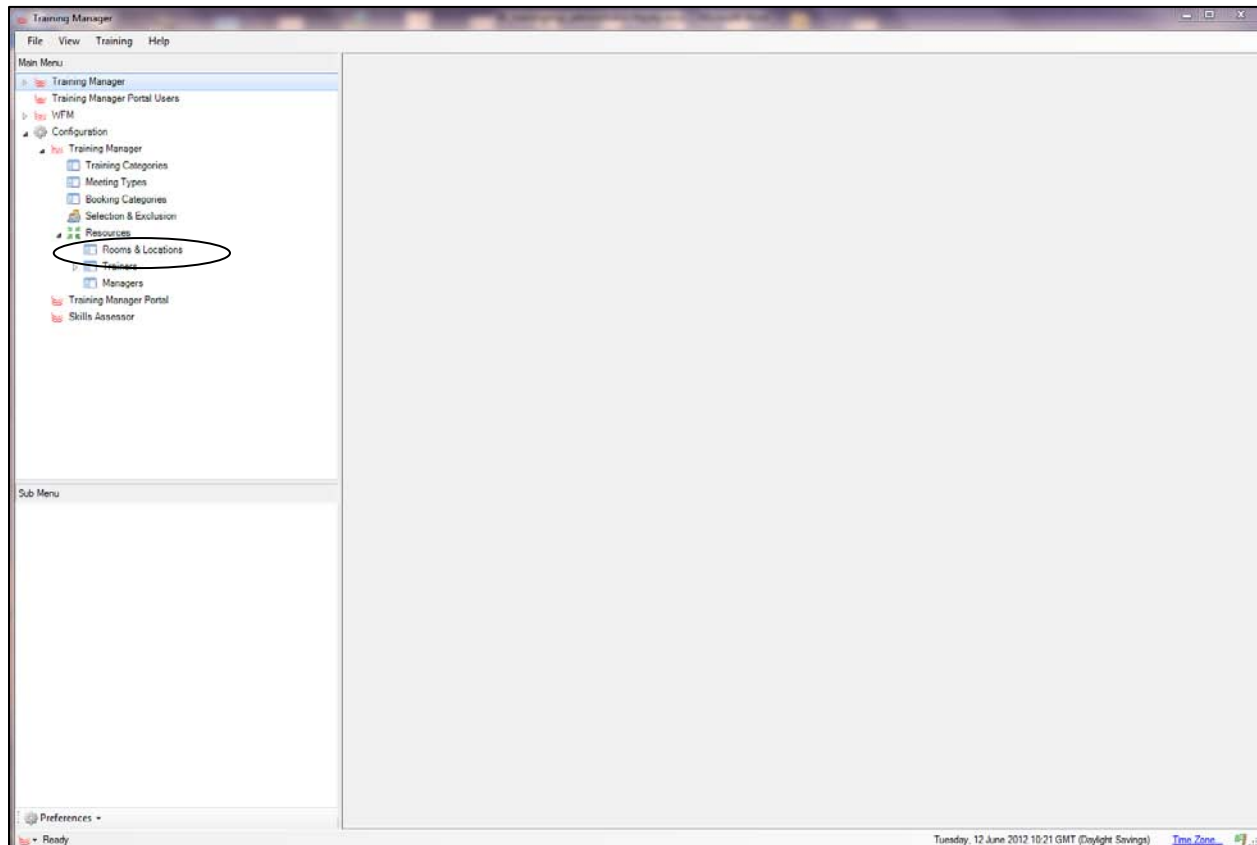
Expanding the `Internal Sub Menu` displays a list of the internal sites. Expand the site to reveal any associated rooms.
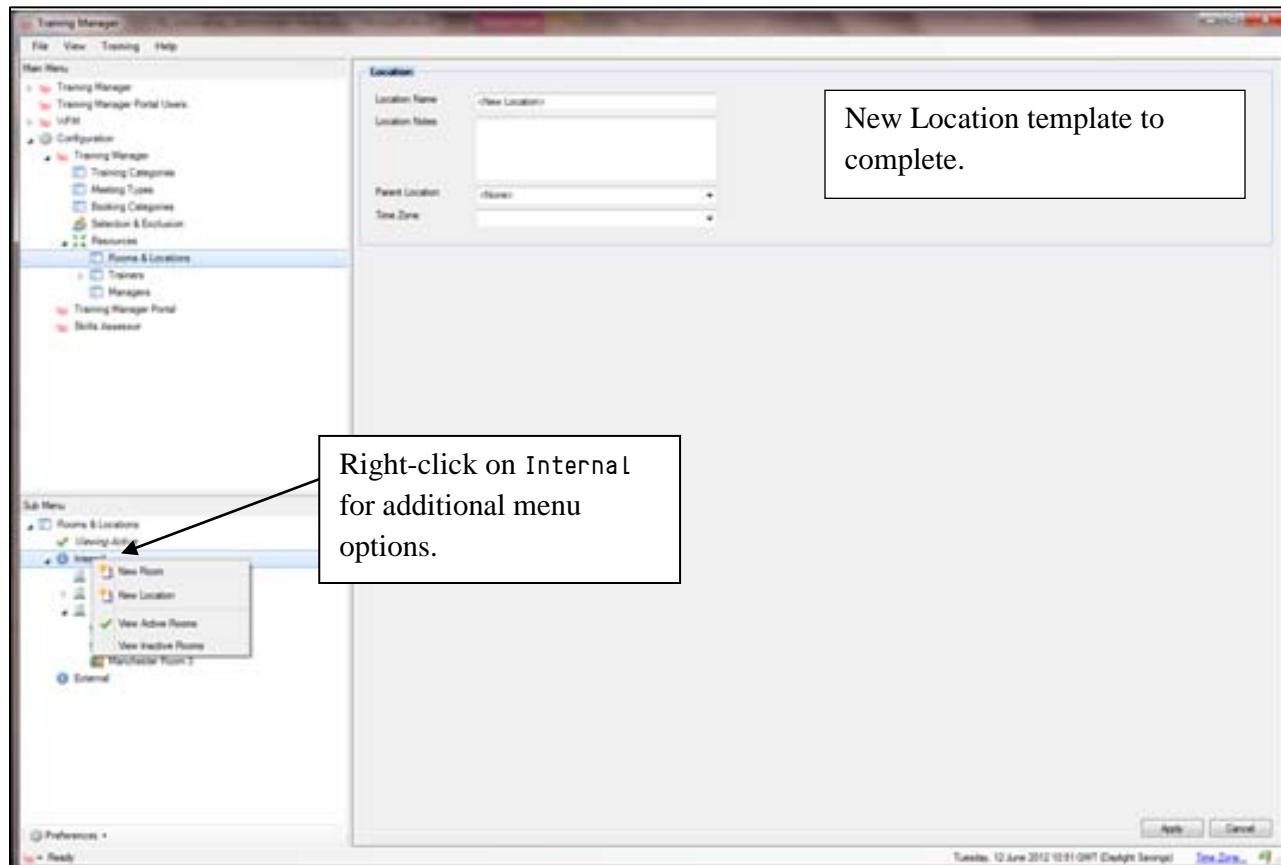
To create a new location, right-click `Internal` in the `Sub Menu`; additional options will appear.

Select `New Location`, and complete the details as required. If the location is a satellite site, select it from the `Parent Location` drop-down menu. Once the location has been created, rooms, trainers, and agent teams can be associated to it.

Deleting Locations

To delete a location, select it from the `Rooms Sub Menu` and then right-click the location and select `Delete Location`.

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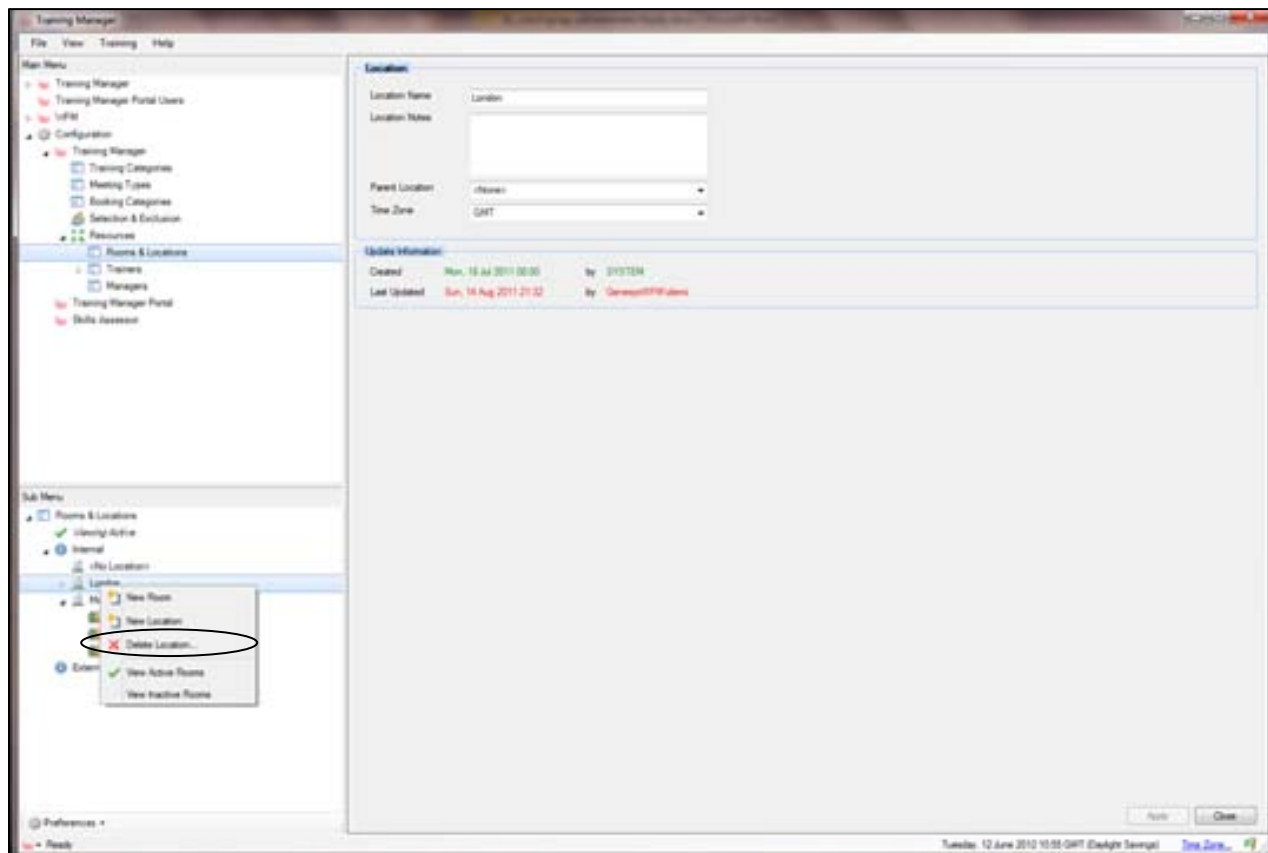
Creating Rooms

Rooms are created using the Resources option, similar to creating locations.

Select New Room from the Rooms Sub Menu; this will associate the new room with the location.
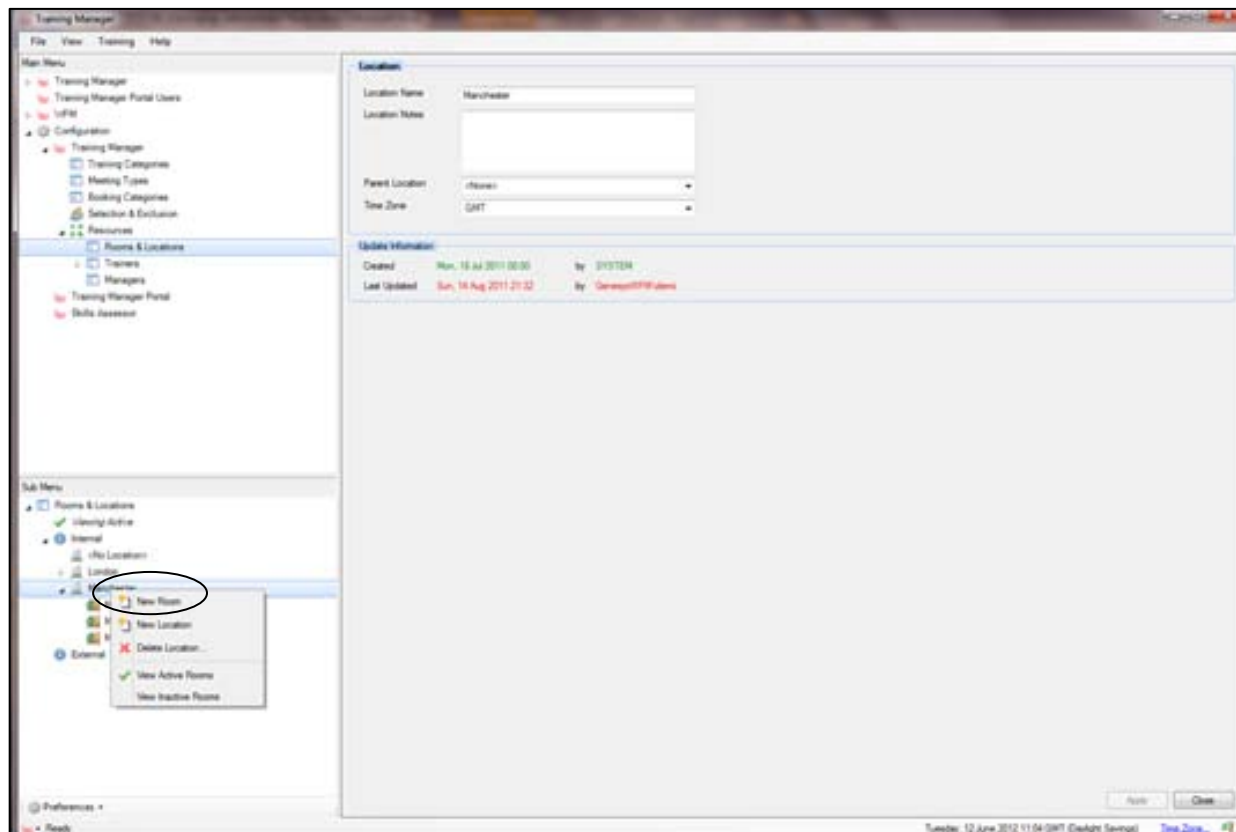
After selecting New Room, the Room screen appears on the right-hand side of the window.

Enter a relevant room name (including the location as part of the room name identifies where the training will take place) and any other necessary details.

Select the location of the room from the Location drop-down menu (the location name will be populated automatically if the room is created against the location).

Enter the room constraints, for example, the minimum and maximum number that the room can accommodate for training. Leave the minimum capacity of the room as 1 and manage the training group size as part of the scheduling process.

If the room becomes unavailable for scheduling then uncheck the Active box. The room will not appear as available when selecting rooms in which to schedule training.

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

Enter the details as required. It is recommended that the minimum capacity be left at 1.

Clear `Active` if the room becomes no longer available.

Select `Apply` to save.
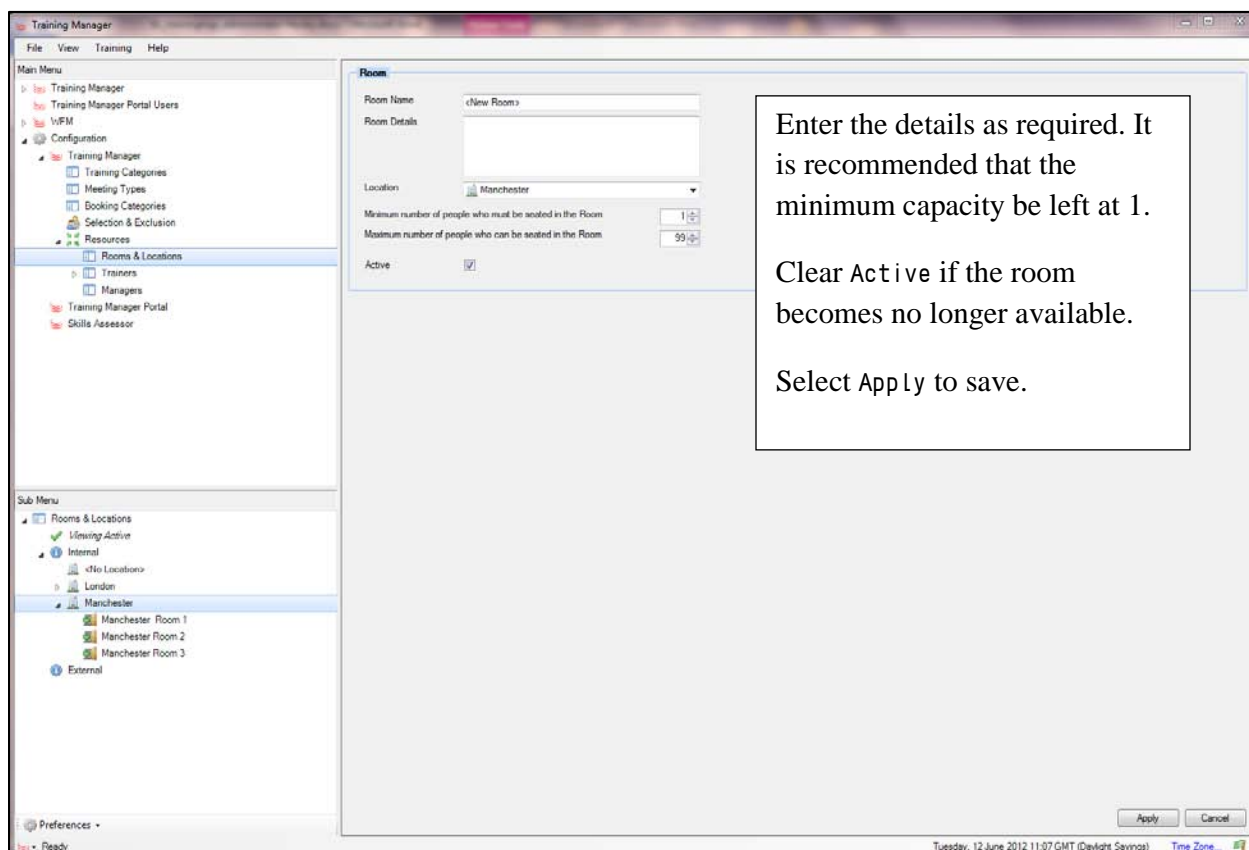
Deleting Rooms

To delete a room, expand the location and select the room that you want to delete. Right-click the room and select `Delete Room` as in the example below.

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

There is, however, the option to make the room inactive, which removes it from the list of available rooms. Uncheck the `Active` box; the room is now inactive.
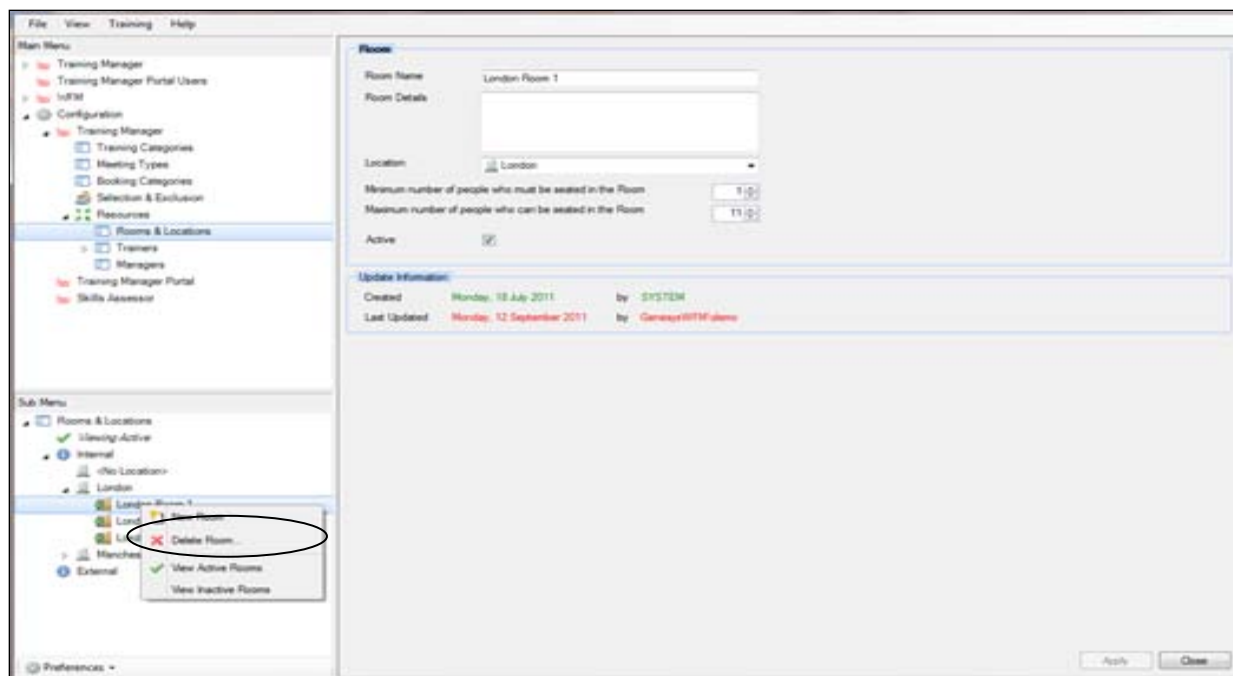
Creating Trainers

Trainers are created and managed from the `Configuration` option under `Main Menu`.

Select `Configuration`, then select `Training Manager`, and then select `Resources`. Select `Trainers`; the tree view will appear in the `Sub Menu` below.

Right-click `Internal` to view any configured internal trainers.
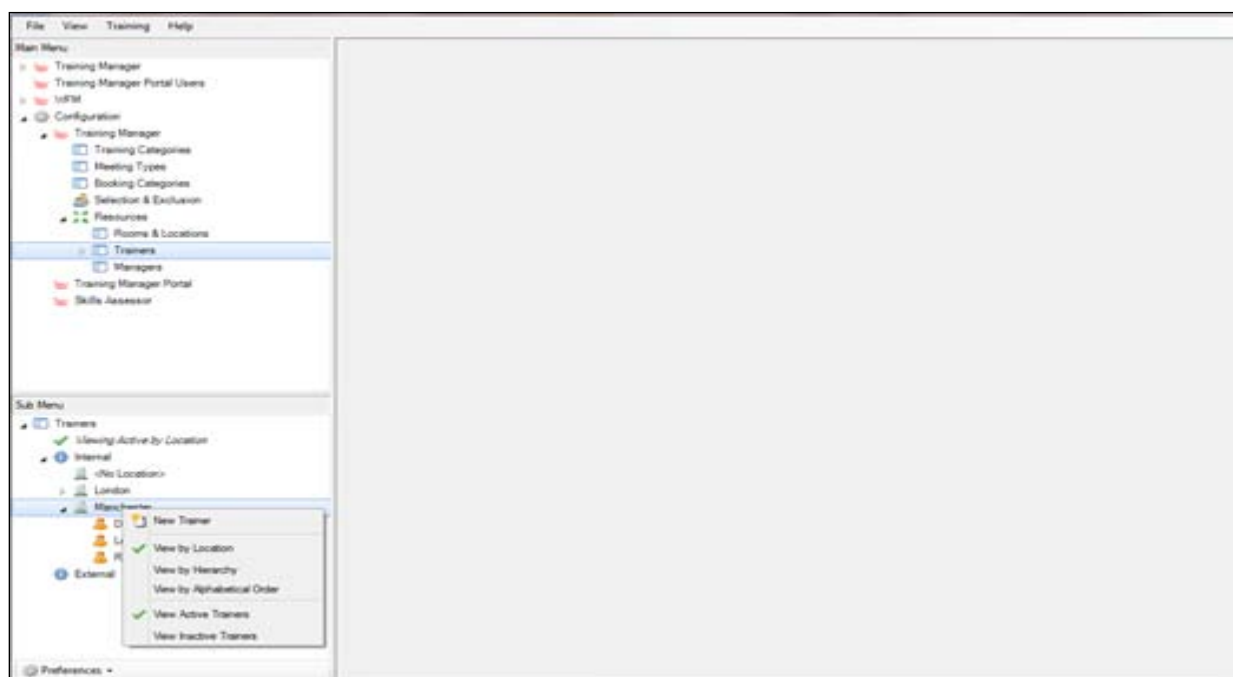
There are three ways to view the trainer structure; the Sub Menu hints will indicate which view is displayed. Right-click Internal in the Sub Menu; the following options will be available:

1. View by Location - this lists all of the locations in the Sub Menu; expanding the location reveals the associated trainers.
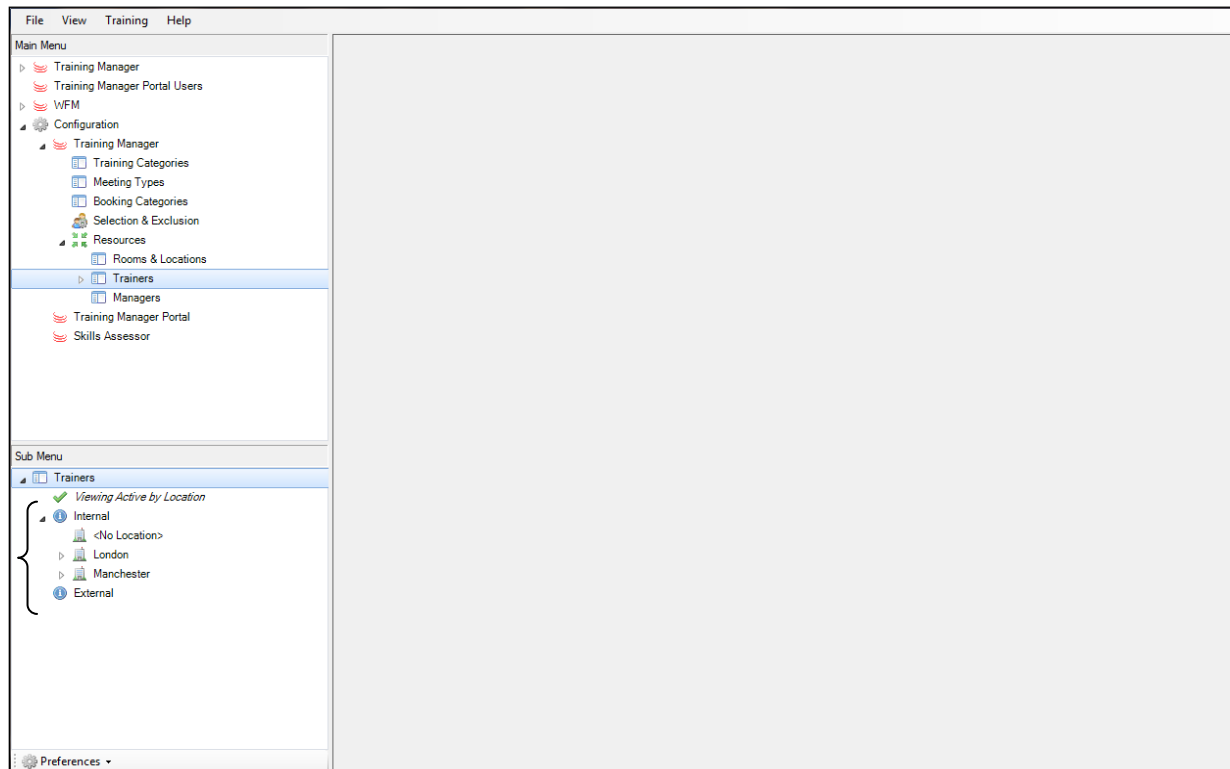
2. View by Hierarchy - this lists the trainer manager and any associated trainers (creating the Trainers hierarchy will be covered later in the document).
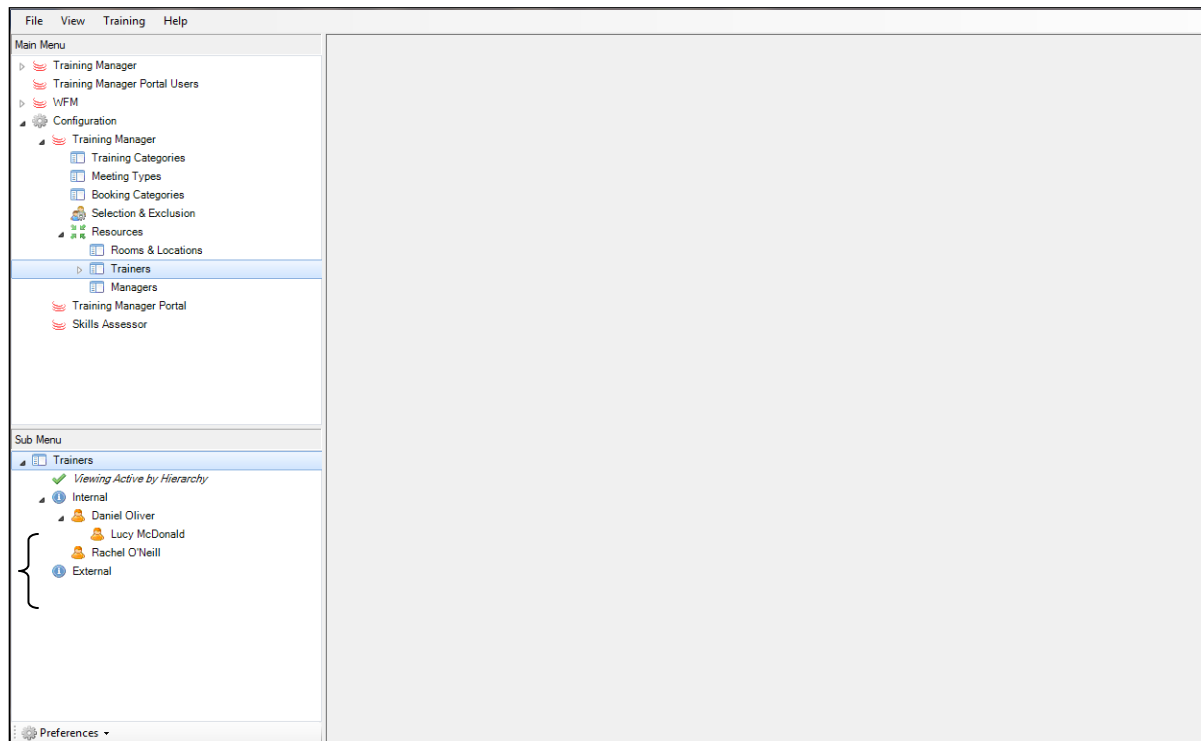

3. View by Alphabetical Order – this lists all of the trainers in alphabetical order.
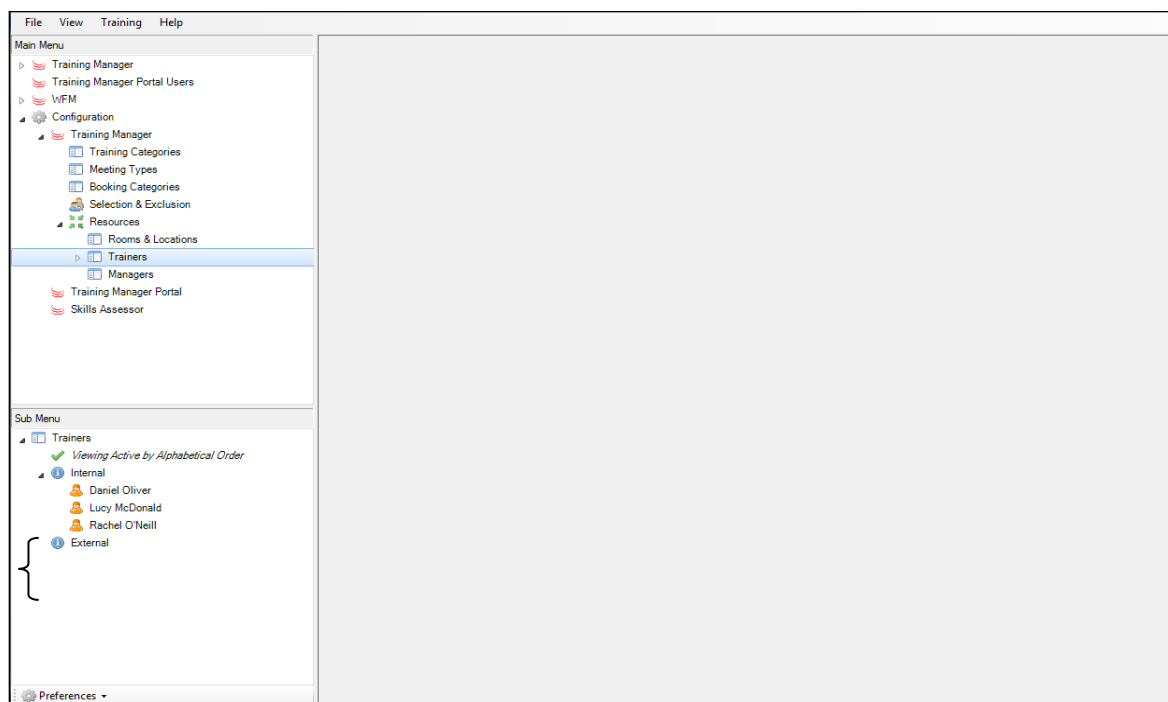
A new trainer can be created either by right-clicking the location, or by right-clicking `Internal`. The option to create a new trainer will then appear.
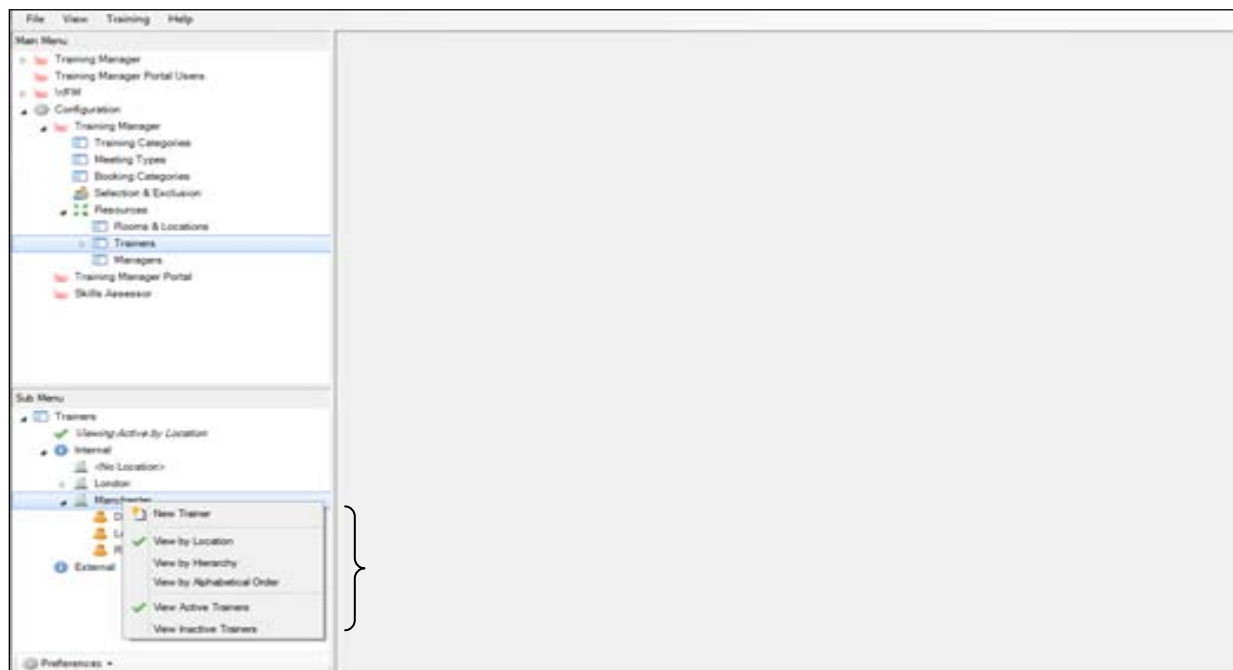
Select `New Trainer`; the `Trainer` screen will appear on the right-hand side of the window.
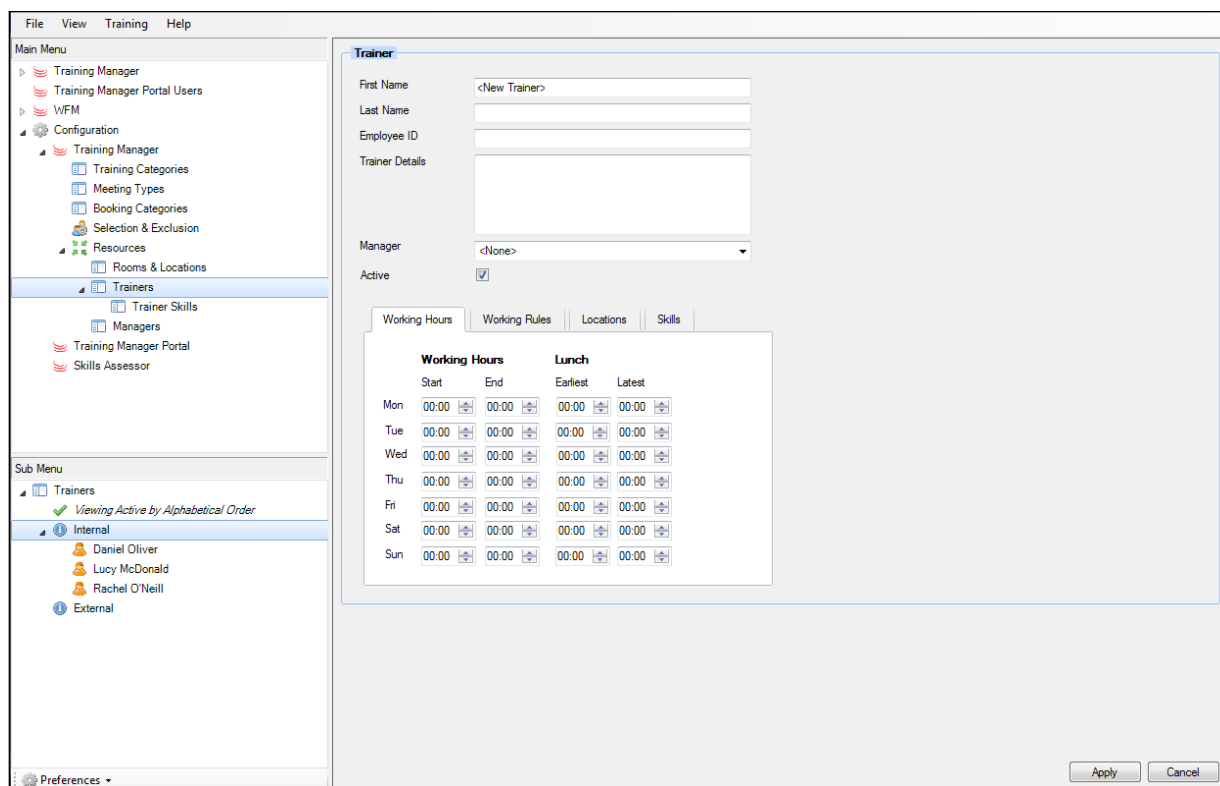
Enter the details as required. If the trainer is external, an external reference can be included.

The option to mark the trainer as inactive is also available.

Information entered in `Working Hours` and `Locations` identifies when and where the trainer is available.

The `Skills` tab is used to associate specific skills with individual trainers.

Working Hours

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

Working Hours:

- `Start`–the earliest time that the trainer can start work.

- `End`–the latest time the trainer can finish work.

- `Lunch`–the earliest and latest times for lunch.

- `Earliest`–the earliest time the trainer can have their lunch.

- `Latest`–the latest time the trainer can finish their lunch.

This information allows the application to understand when the trainer can be scheduled and how flexible they are with their working hours.

Working Rules

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

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

- `Trainer Week Starts On`–enables Training Manager to calculate the trainer's working hours against their maximum hours per week.

- `Minimum Hours Between Working Days`–the mandatory minimum rest time between shifts.

- `Minimum Required Lunch Break in the Working Day`–the time entered here will ensure that the trainer receives this minimum amount of time for their lunch break.

- `Total Minutes for all Breaks in the Working Day`–the time entered here will ensure that the trainer receives this minimum amount of time for their total lunch breaks.

This information allows the application to understand when the trainer can be scheduled and how flexible they are with their working hours.

Locations

The information on this tab must be completed as part of configuring a new trainer.

It identifies the location(s) where the trainer can deliver training. More than one location can be selected.

When the `Location` tab is selected, a list of locations in the application appears. Select the relevant location and check the box to the left of the location name. Do the same for each location where the trainer can deliver training. The trainer's home location must be clearly identified, as Genesys Training Manager will always prioritize training to trainers at their home location.

To set a location as a home location, click the icon to the left of the location name and then right-click it to view the `Add Home Location` option. Select `Add Home Location`.

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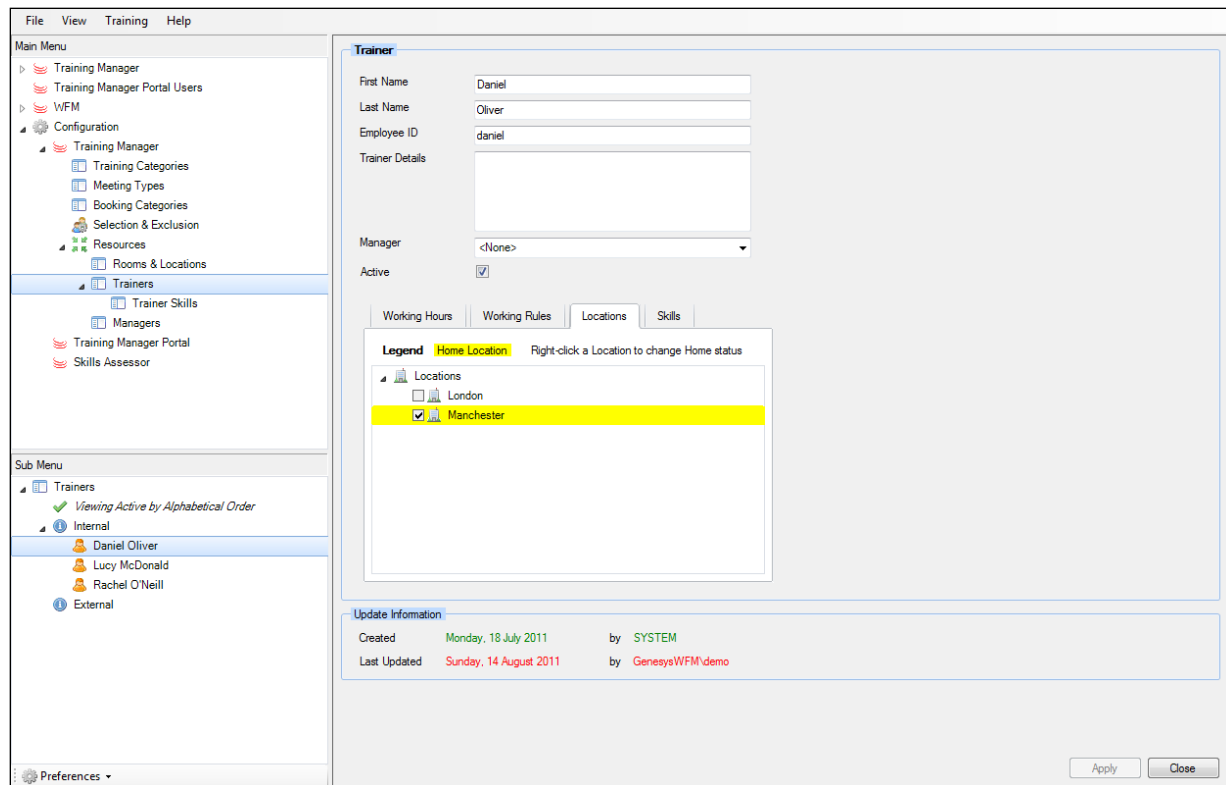
Remove the Home Location

The option to remove the current home location is available by right-clicking the location and selecting `Remove as Home Location`.

You now have the option to select a different home location for the trainer.
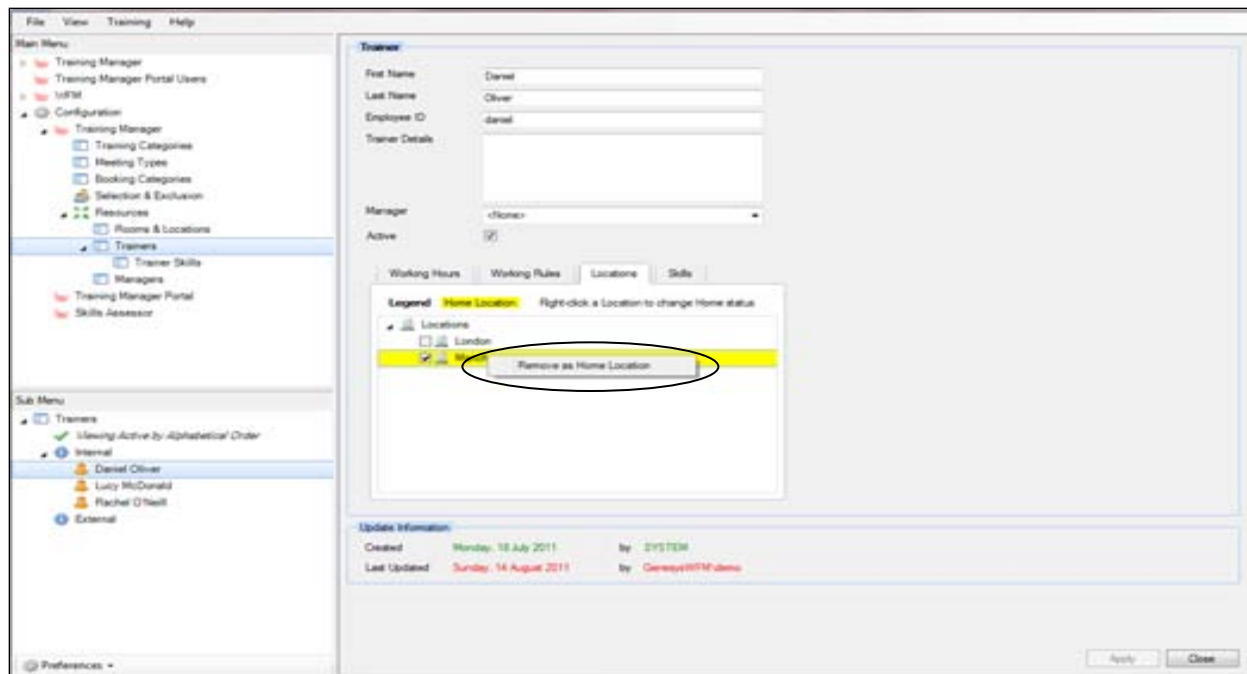
Skills

Select the Skills tab and any skills associated with the trainer will be visible.

To add an additional skill, right-click in the Skills pane and select Add Skill.
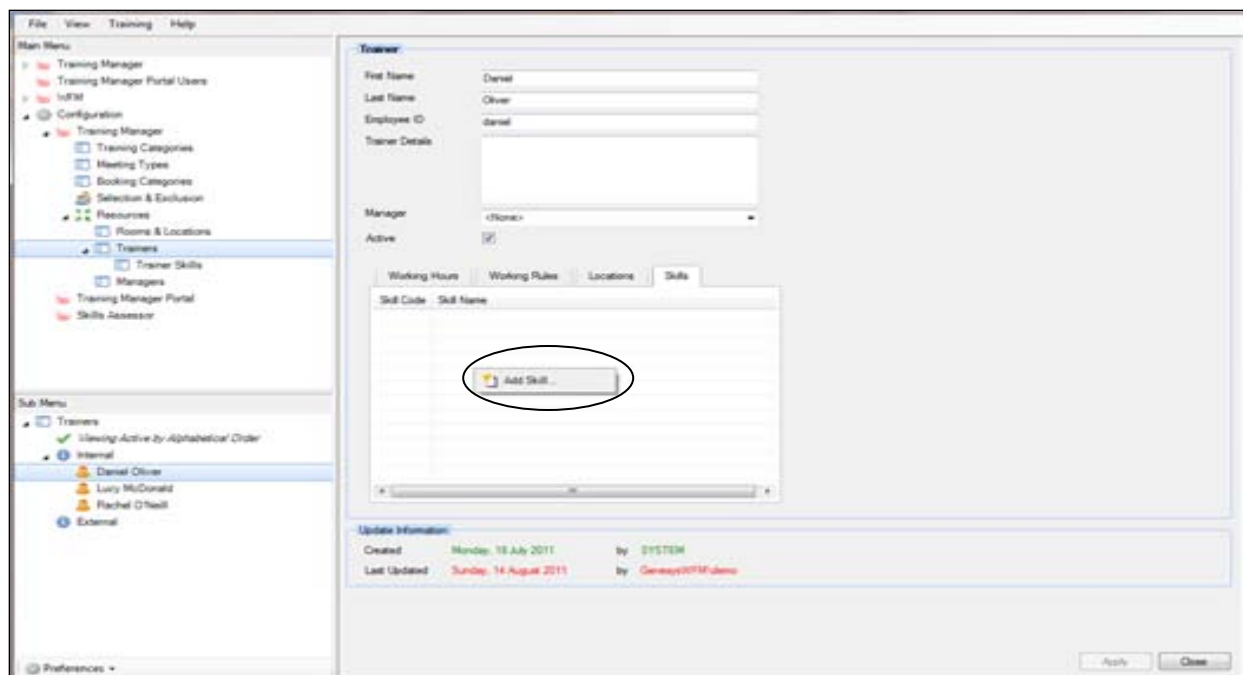

A drop-down menu appears, from which you can select the skill that you want to add.
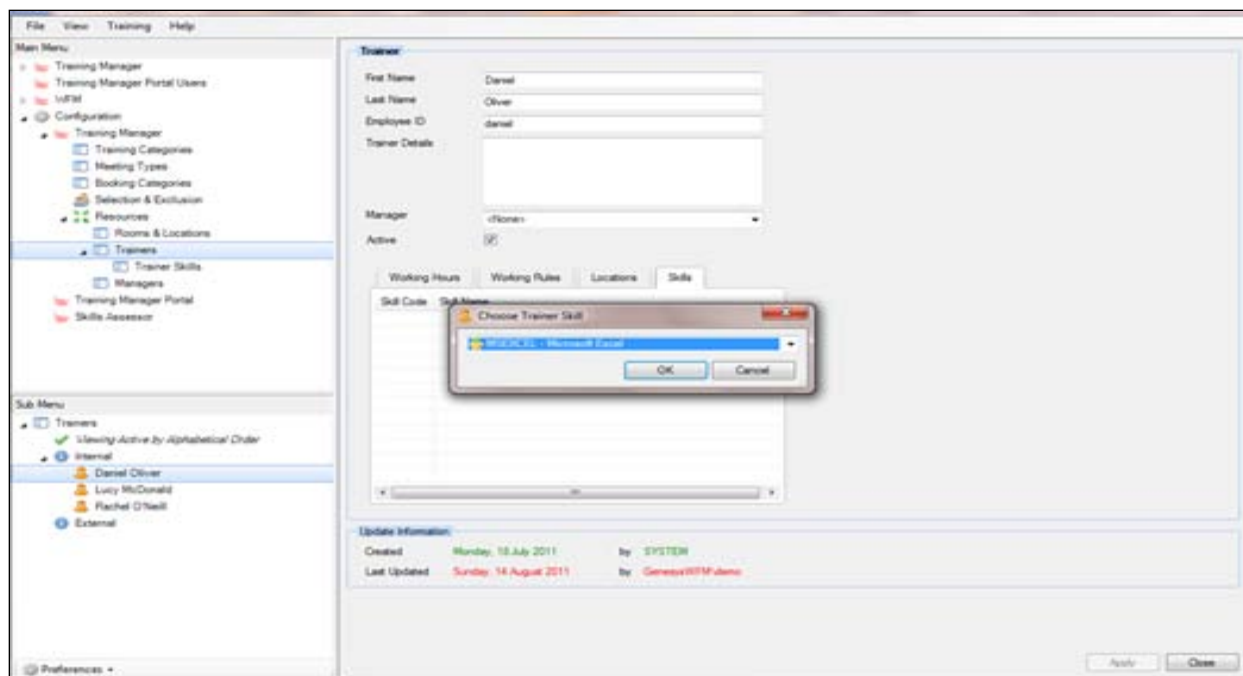
Once you have selected the skill you want, click `OK`, and then click `Apply` to save the new skill against the trainer.

Creating Trainer Skills

The option is available to associate skills with trainers as part of the trainer configuration.

In the `Resources` option, expand `Trainers` to reveal `Trainer Skills`.

The available skills are located in the `Trainer Skills Sub Menu`.
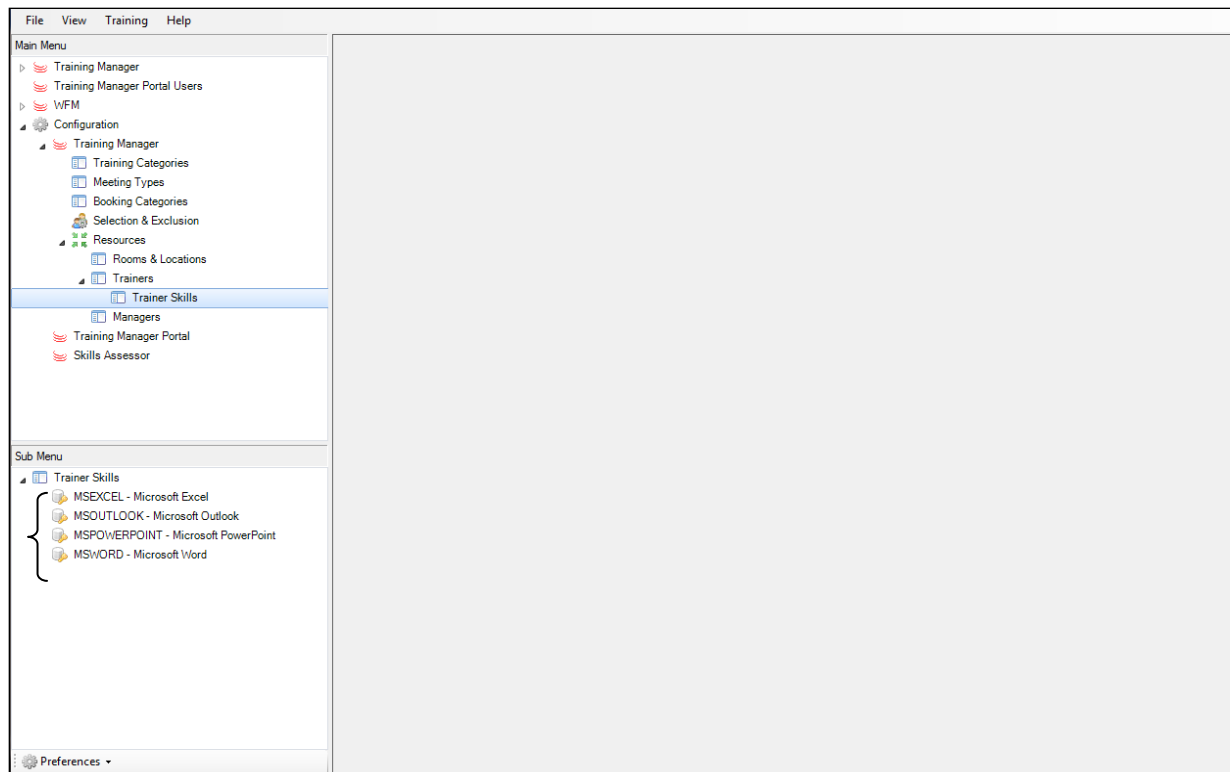
To create a new skill, right-click `Trainer Skills` and select `New Trainer Skill`.
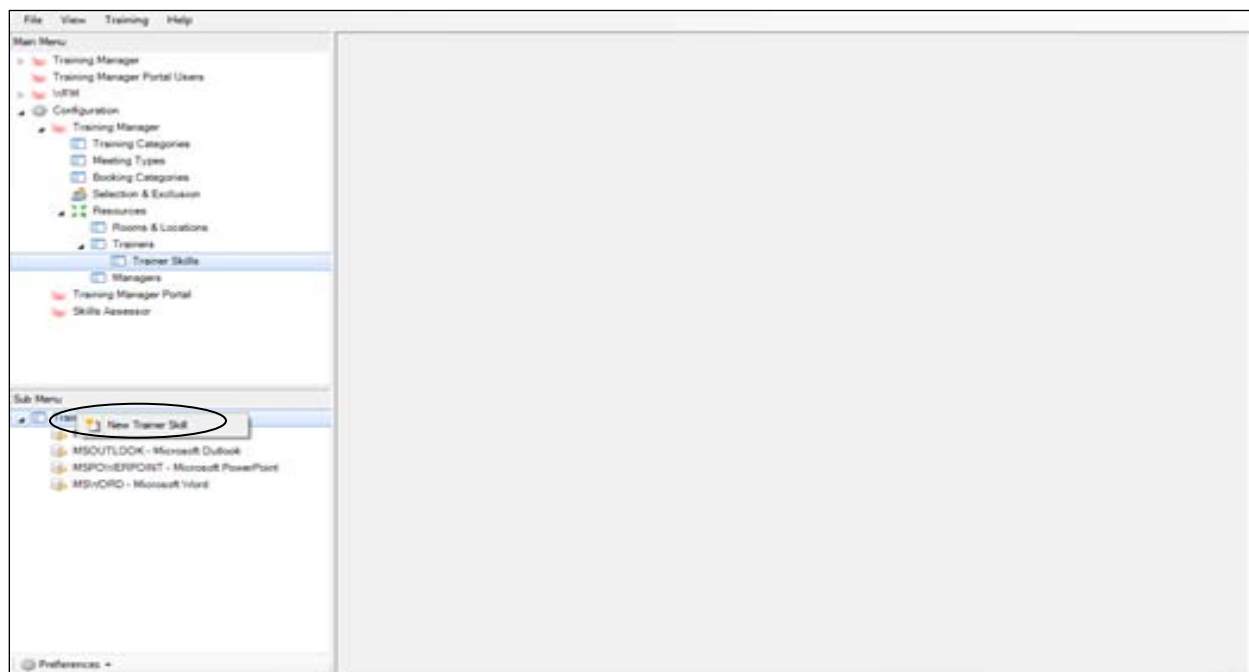
The option to create a new skill code and name is now available.

Click `Apply` when you are finished.
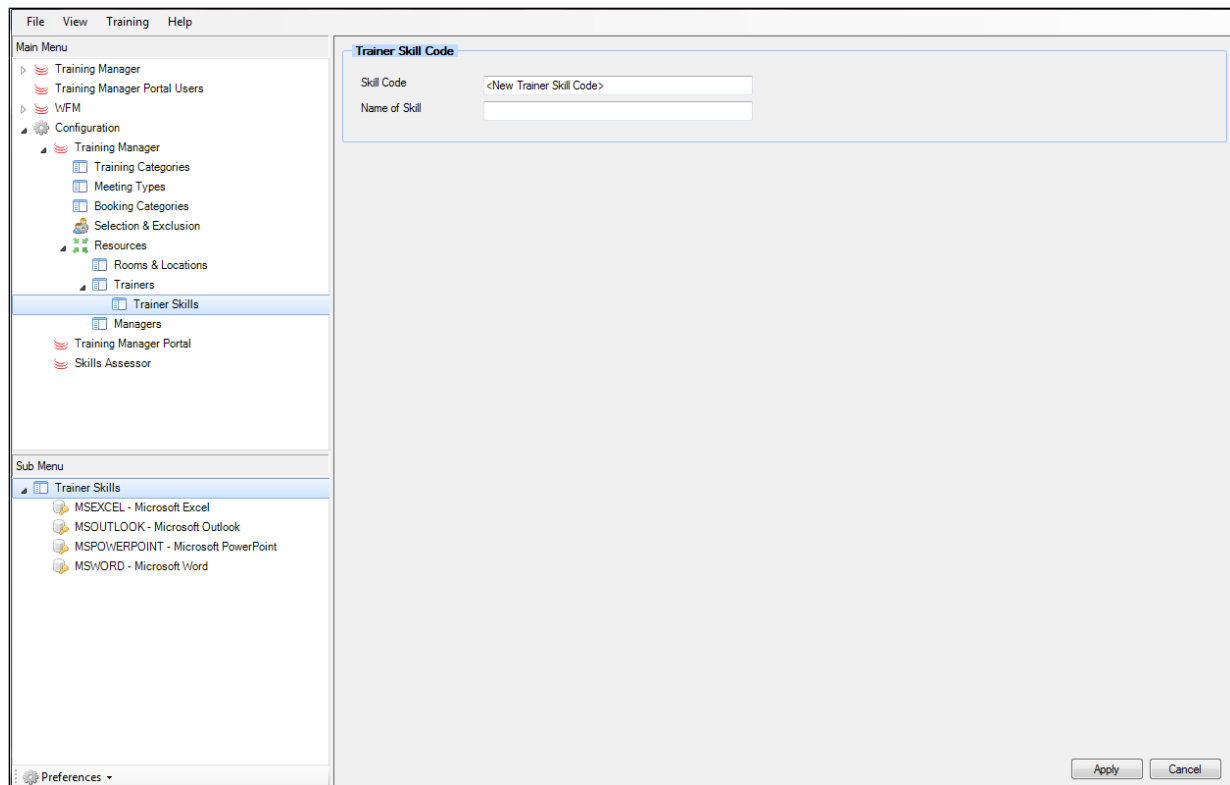
Once the skills have been created they are available to select as part of the trainer configuration.

Deleting Trainer Skills

To delete a trainer skill, select the skill from the list of trainer skills, then right-click it and select `Delete Trainer Skill.`
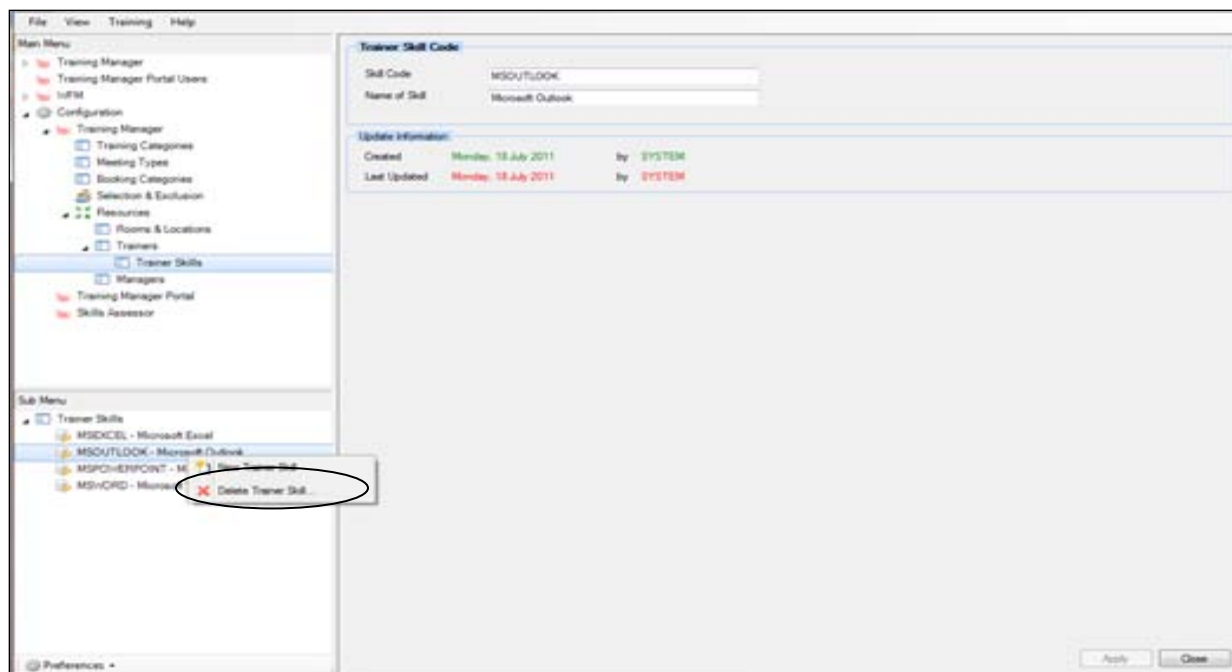
Deleting Trainers

The option to delete a trainer is available by selecting the required trainer, right-clicking it and then selecting `Delete Trainer`.

A trainer can only be deleted if there is no activity associated with them. There is, however, the option to make a trainer inactive and therefore unavailable for selection by clearing the `Active` box.
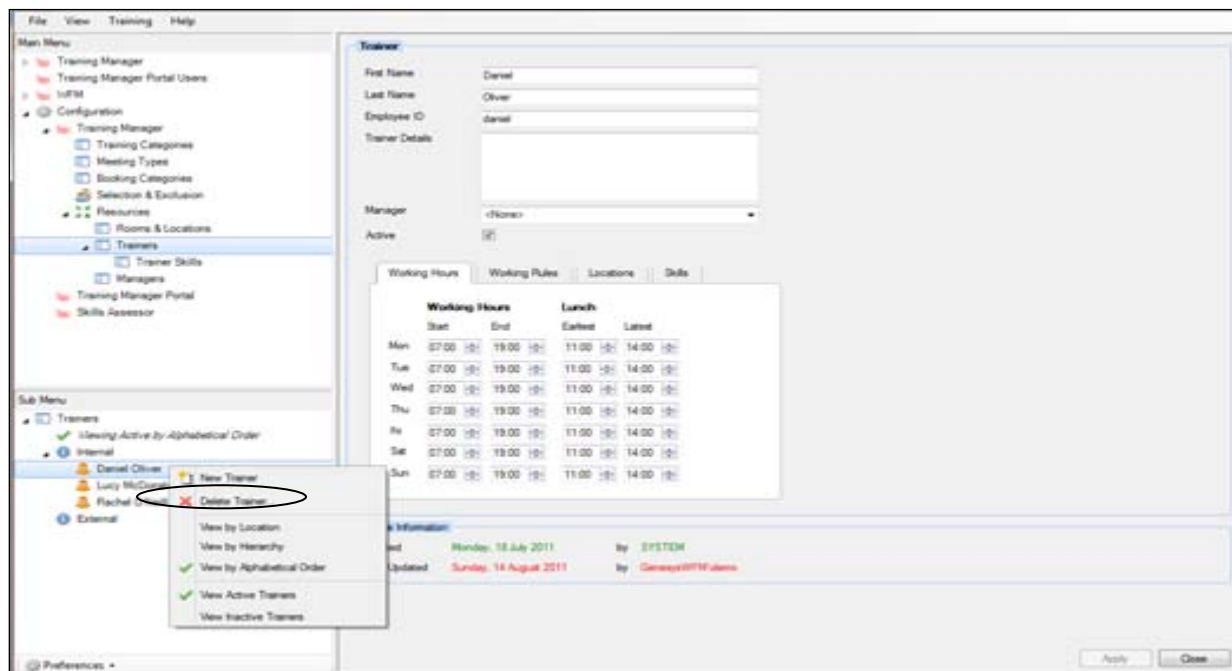
Creating Managers

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

To create a new manager, click `Configuration`, and then click `Training Manager` to expand it. Select `Resources`, and then select `Managers`. Right-click `Managers` to select options from a list.
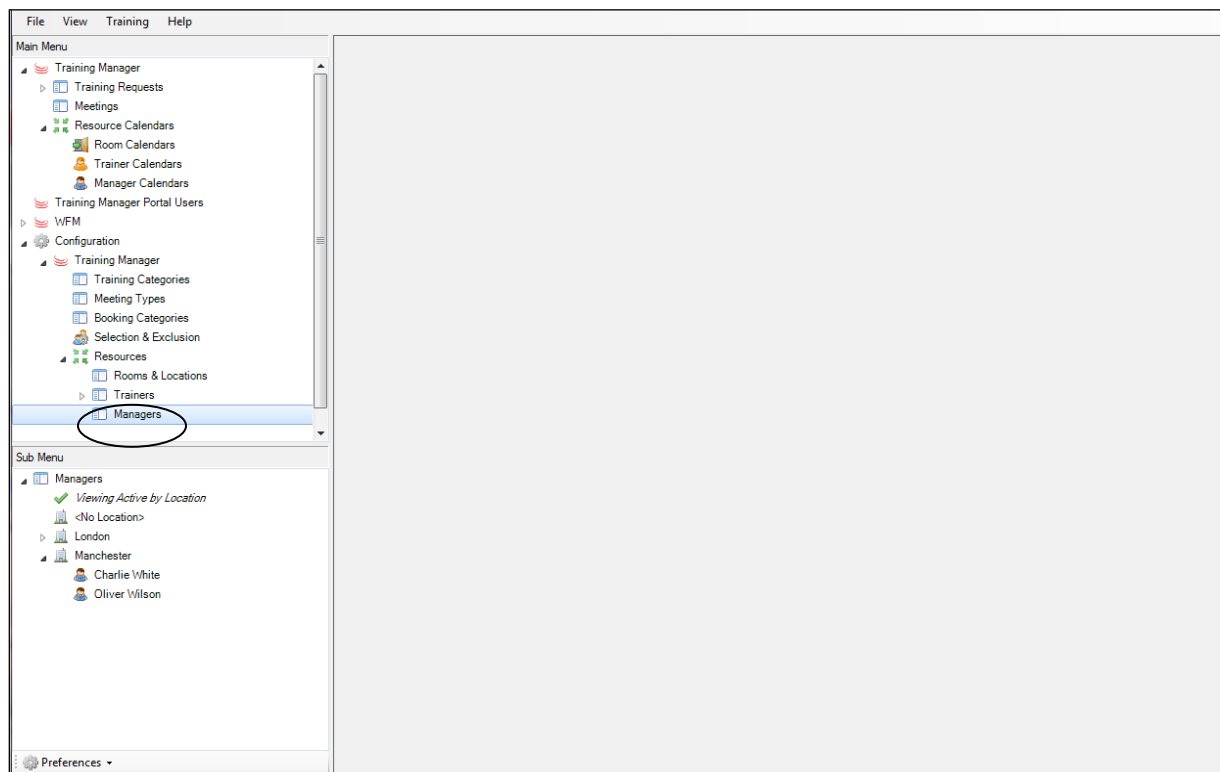

If `View by Alphabetical Order` is selected, a list of existing managers is available in the `Sub Menu`. If `View by Location` is selected, a list of locations is available.

Sub Menu hints will identify which option has been selected.
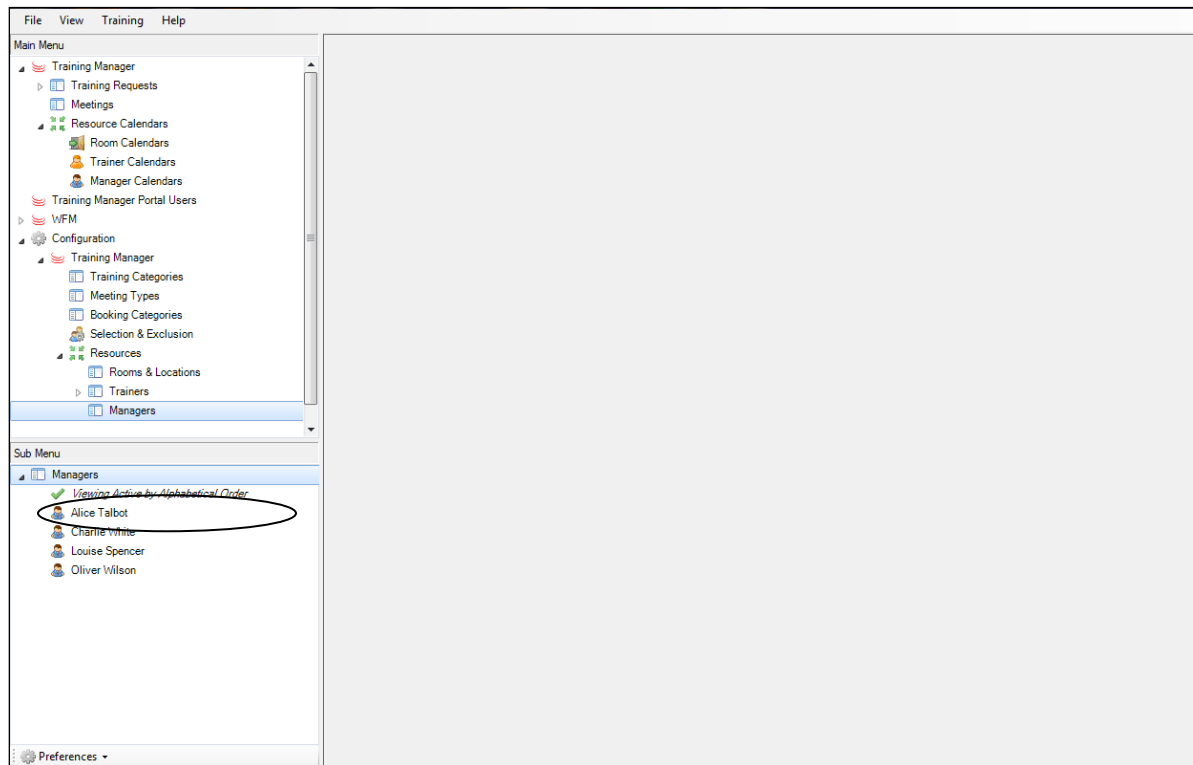
Below is an example of the View by Location option.
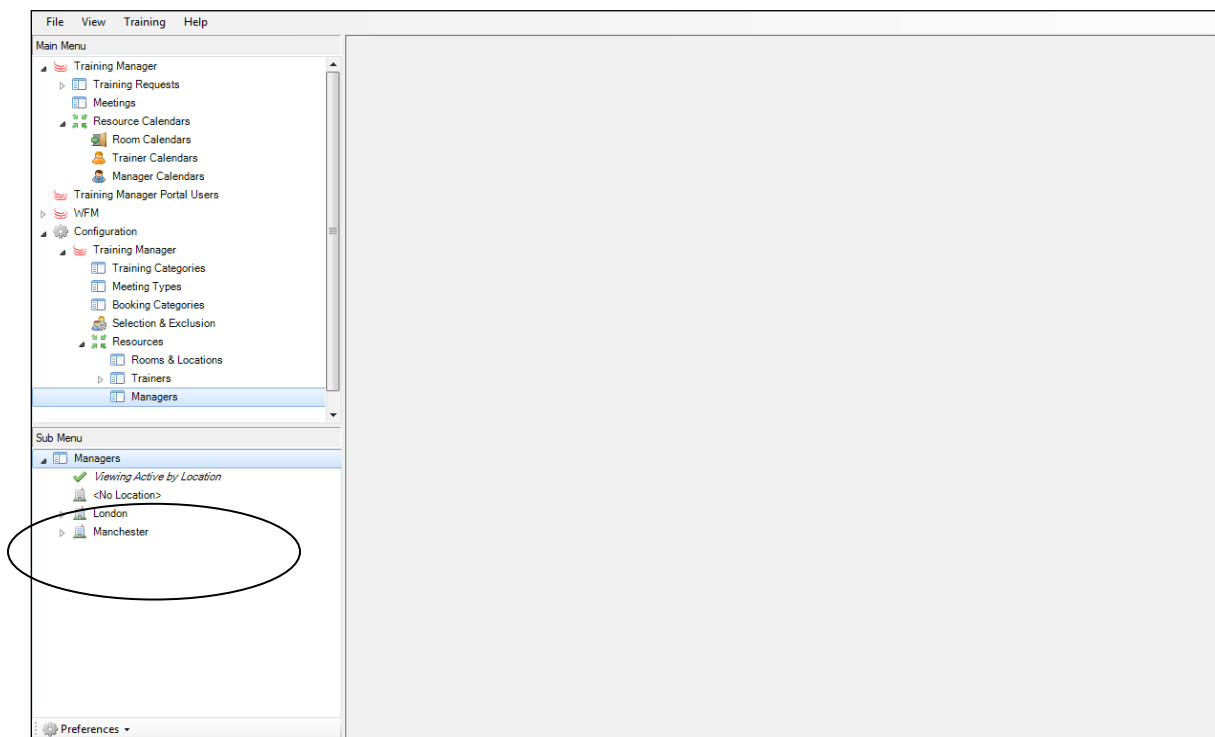
To create a new manager, right-click an existing manager and select `New Manager` from the list.
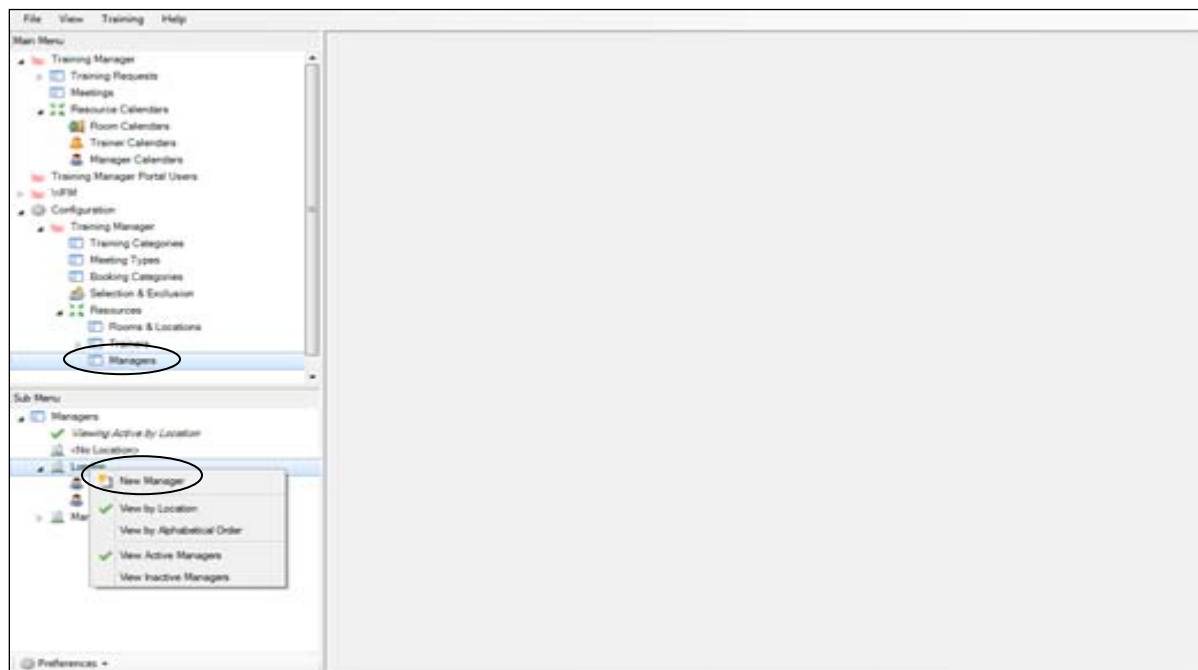
The `Manager` screen appears, with options to configure information for the new manager.

Configure the manager's default working hours in the `Working Hours` tab.
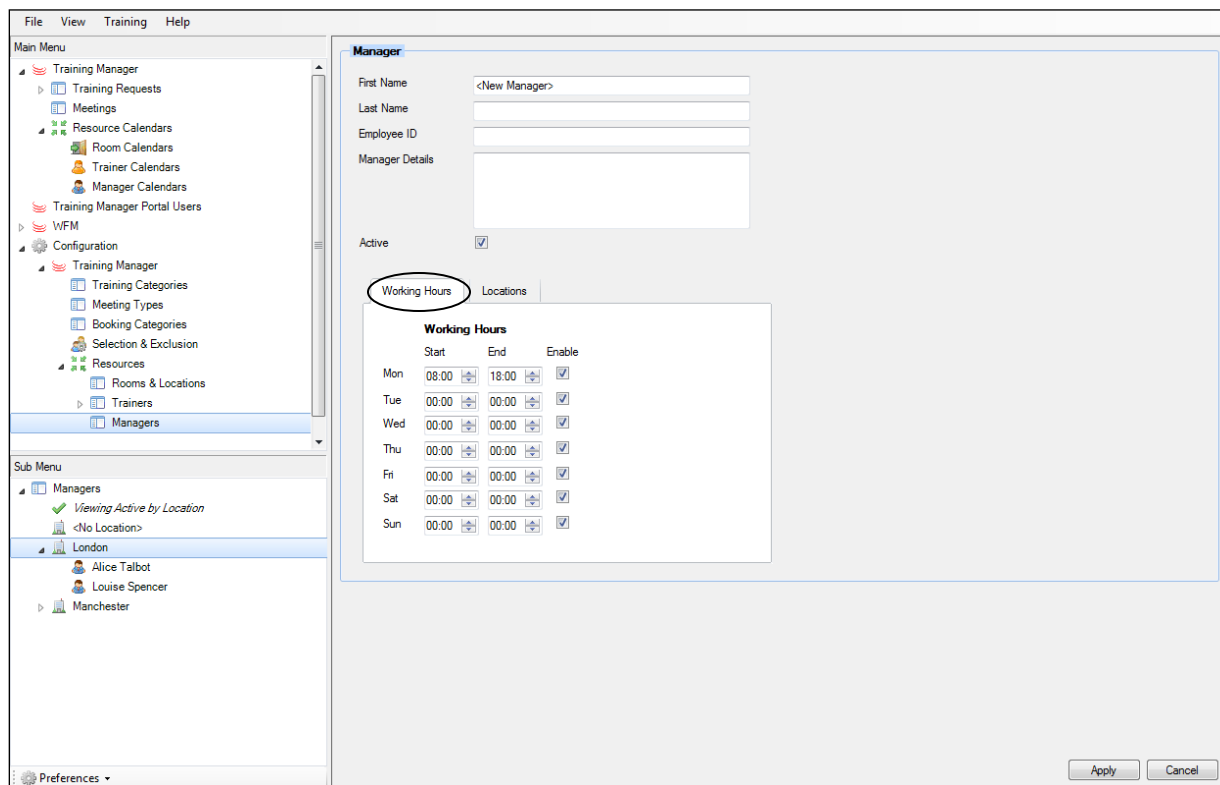
Once the default working hours have been set in Genesys Training Manager, they can be changed in the manager's training portal.

The example below displays a manager's training portal home page with the following two options available under your working hours.

- set your regular working hours

- set exceptions to your regular hours
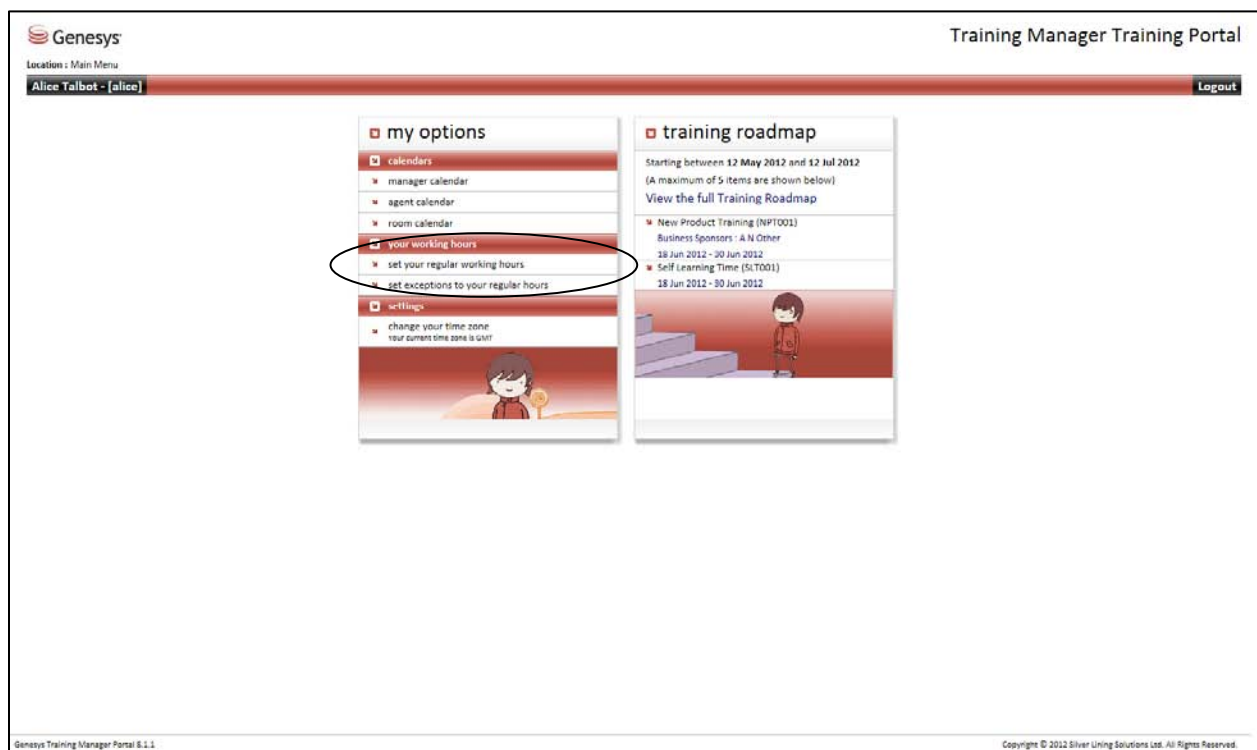
Setting Your Regular Working Hours

After selecting an option, the following window appears, enabling the manager to change their default working hours. The working hours must be defined since Genesys Training Manager needs to know the manager's working hours.

Amend the hours as required, clearing any days that are not working days. This automatically updates the manager's default working hours in Genesys Training Manager.

## Setting Exceptions to Your Regular Working Hours

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

The working days table should not be used to take holidays or training days into account by selecting their dates as non-working days.

From the Locations tab, check the box to the left of the location that you want to associate with the manager. This is required as part of the meeting scheduling process, and will be covered in the Meeting section of this document.

After checking the relevant location, click Apply.
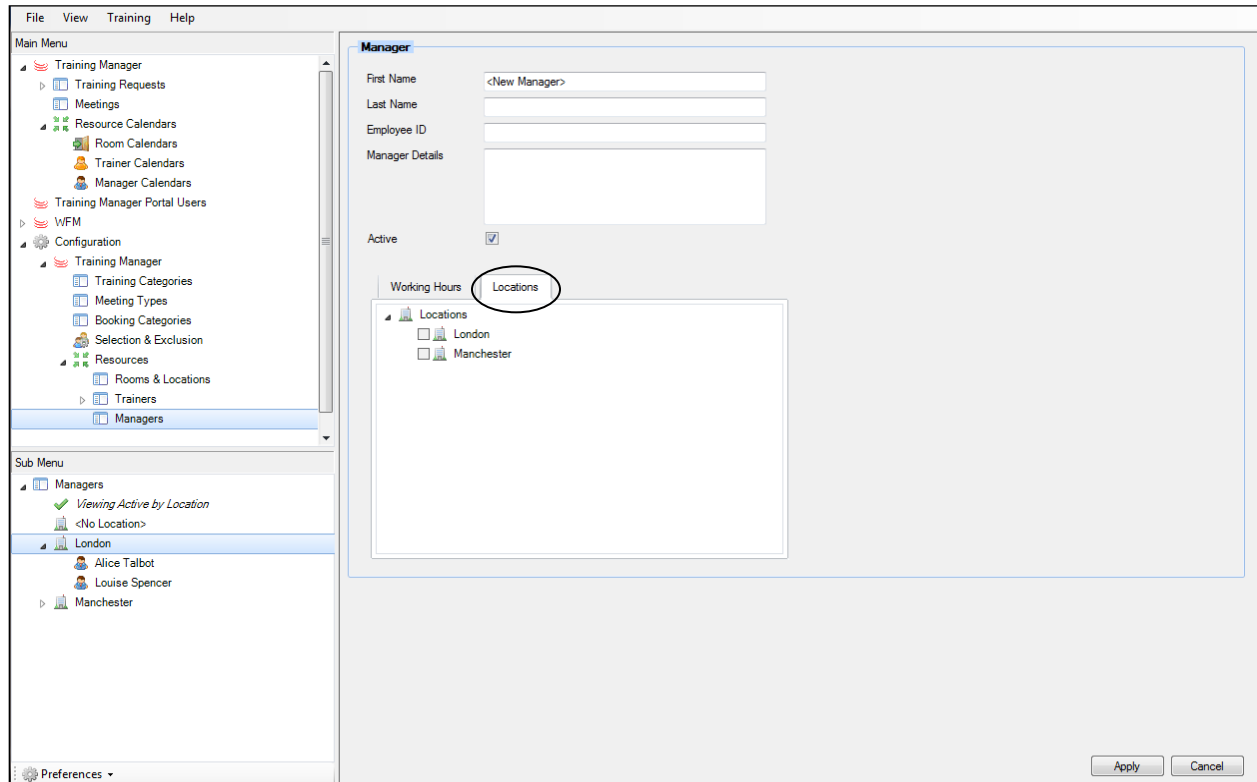
Associating agents with Locations and providing an exclusion reason for an Individual agent

There are now two tabs in the main window:

1. `Selection` –to associate locations either with teams of agents or with individuals.

2. `Global Exclusions`–to mark individuals with reasons for nonscheduled activity, for example, long-term sick, reassignment, and maternity.
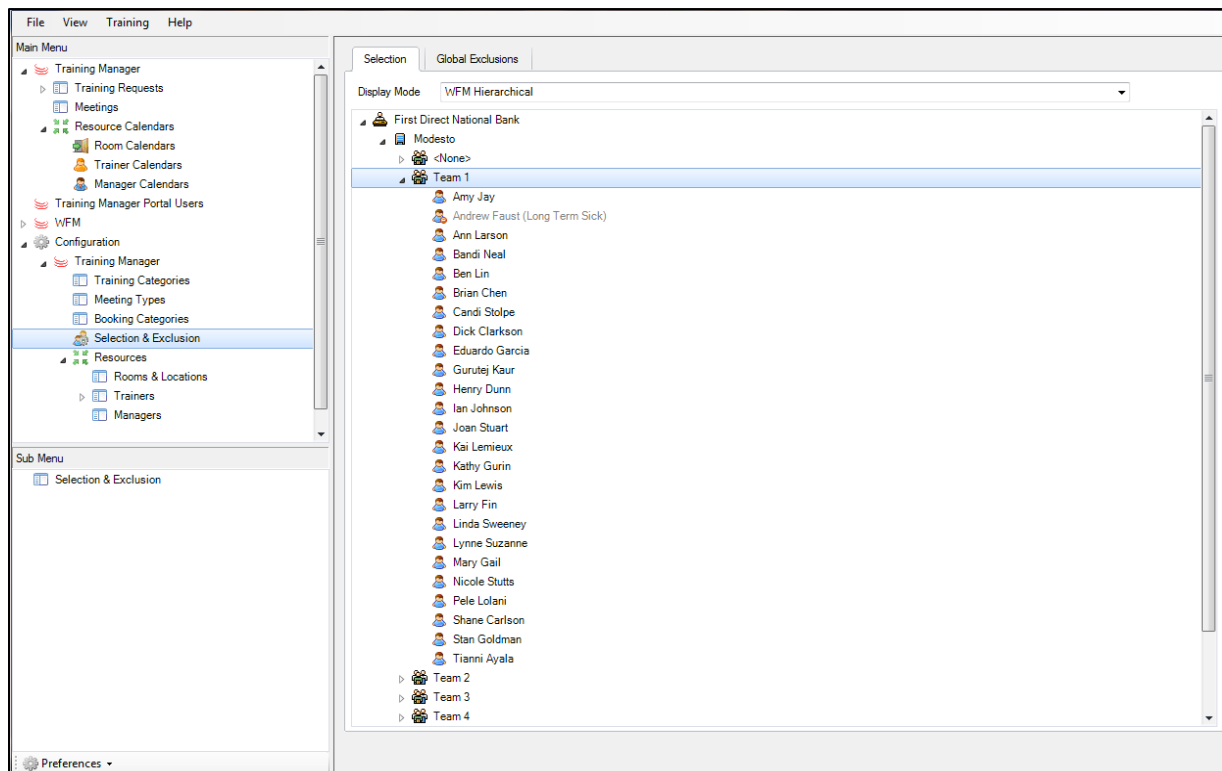
Right-click the team to set or change the location, as in the example below.
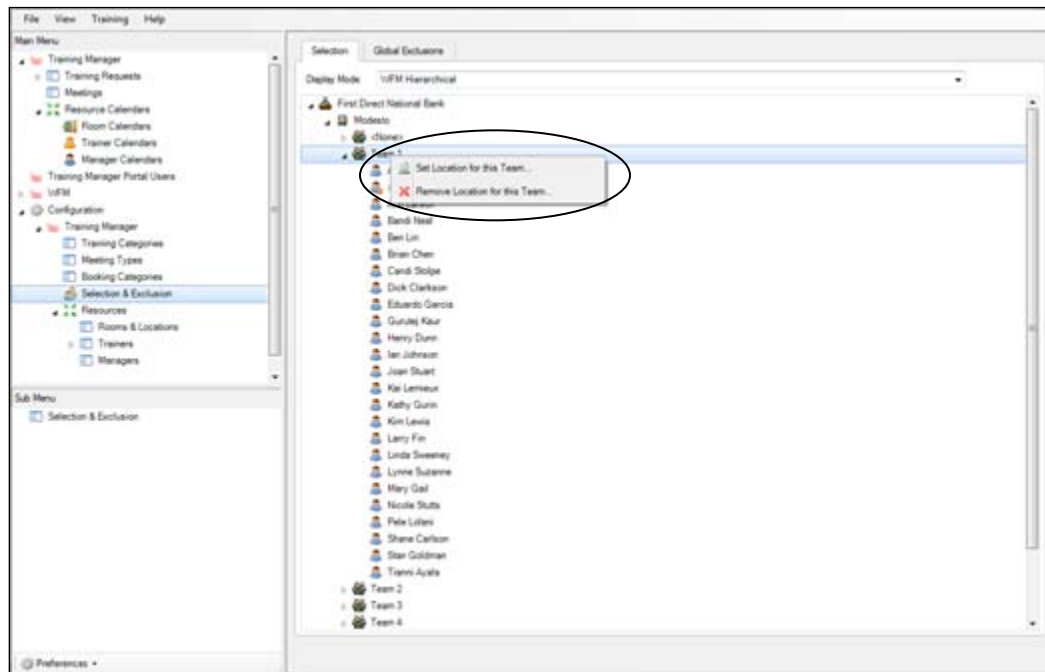
For an individual agent, there are additional options available to mark them for exclusion.
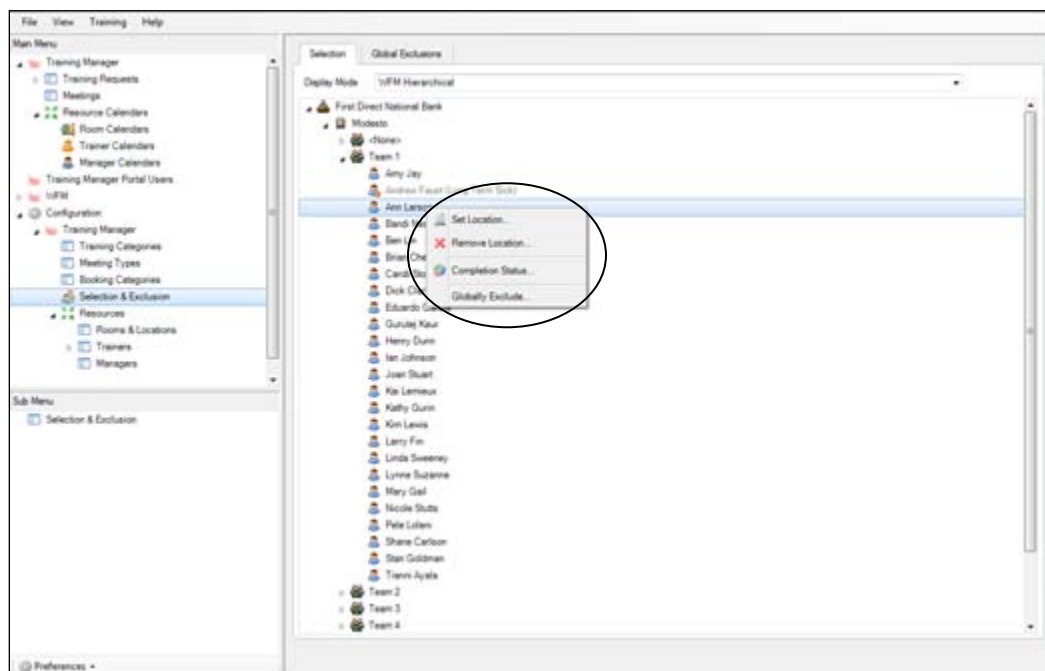
Once the teams or individuals have been associated, the locations will appear to the right.
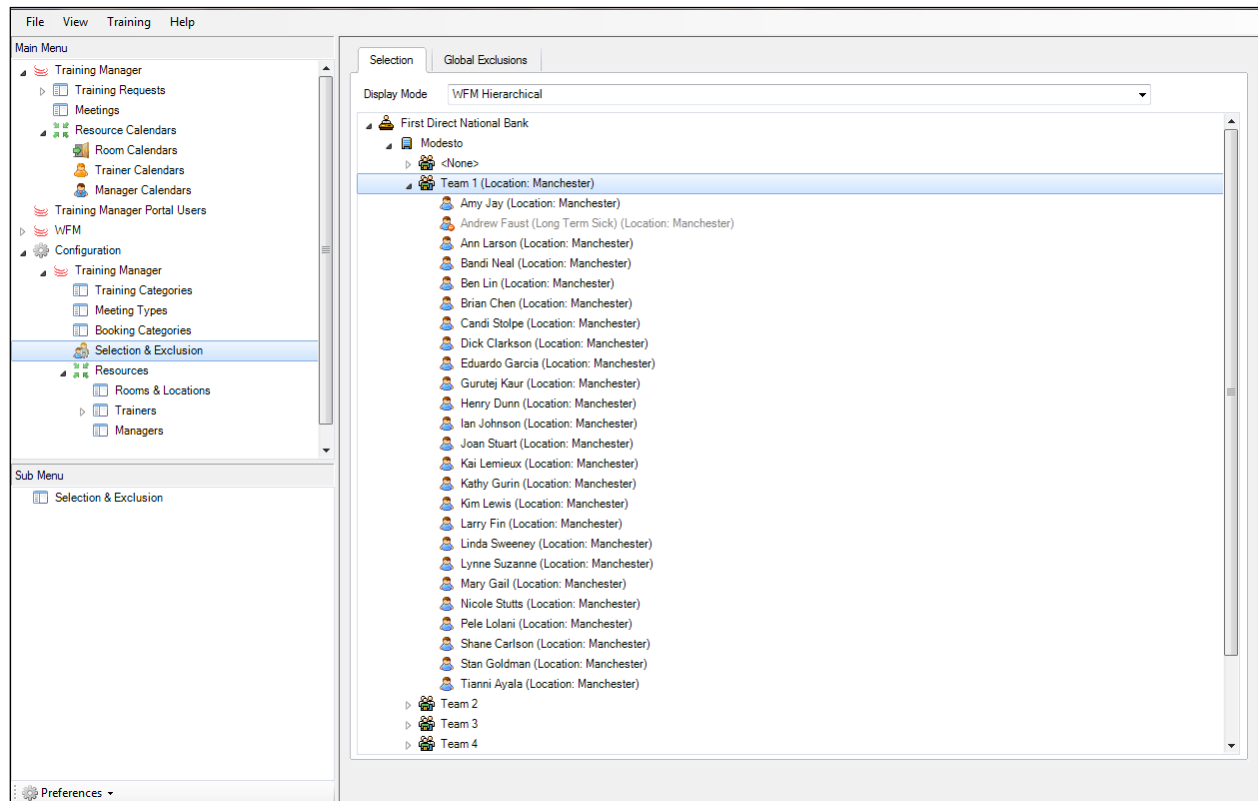
Please note that the associated locations will not appear against the teams or individuals until those teams or individuals are selected. This is so that Training Manager does not purge the database for each team in order to identify the required location.
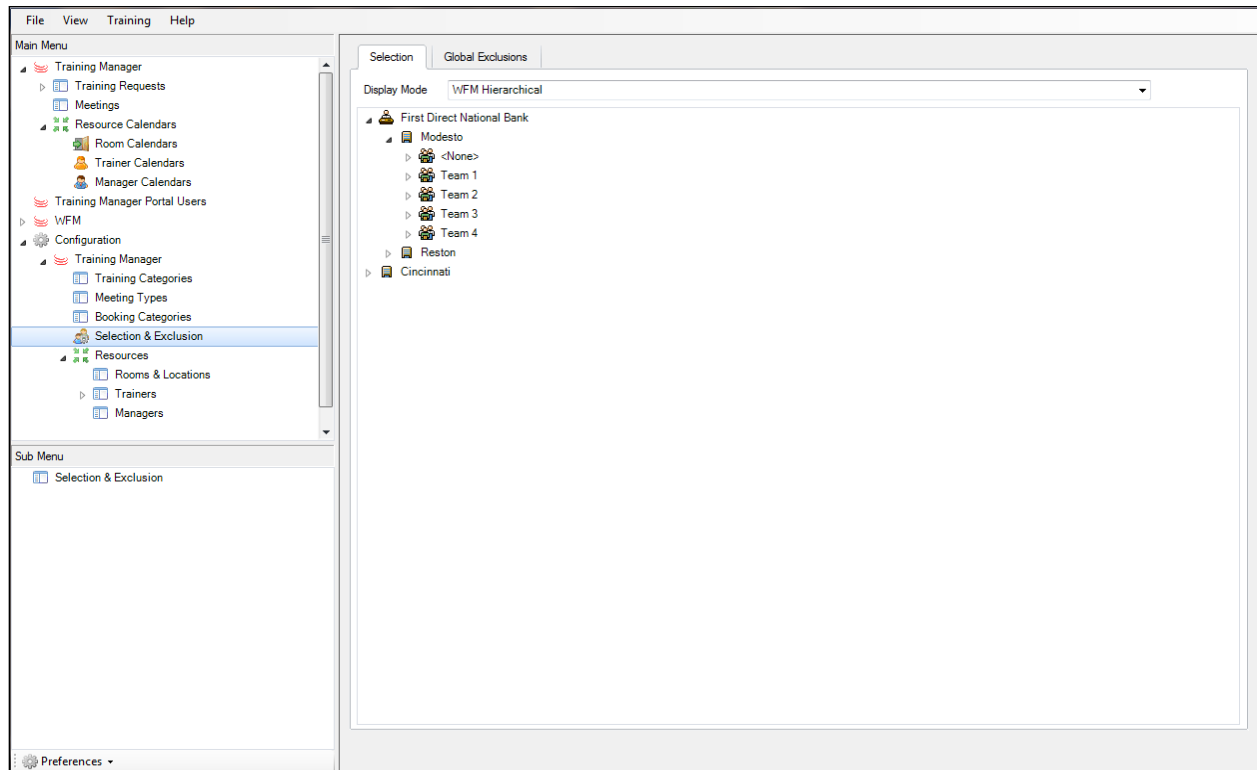
There is also the option to change the view.
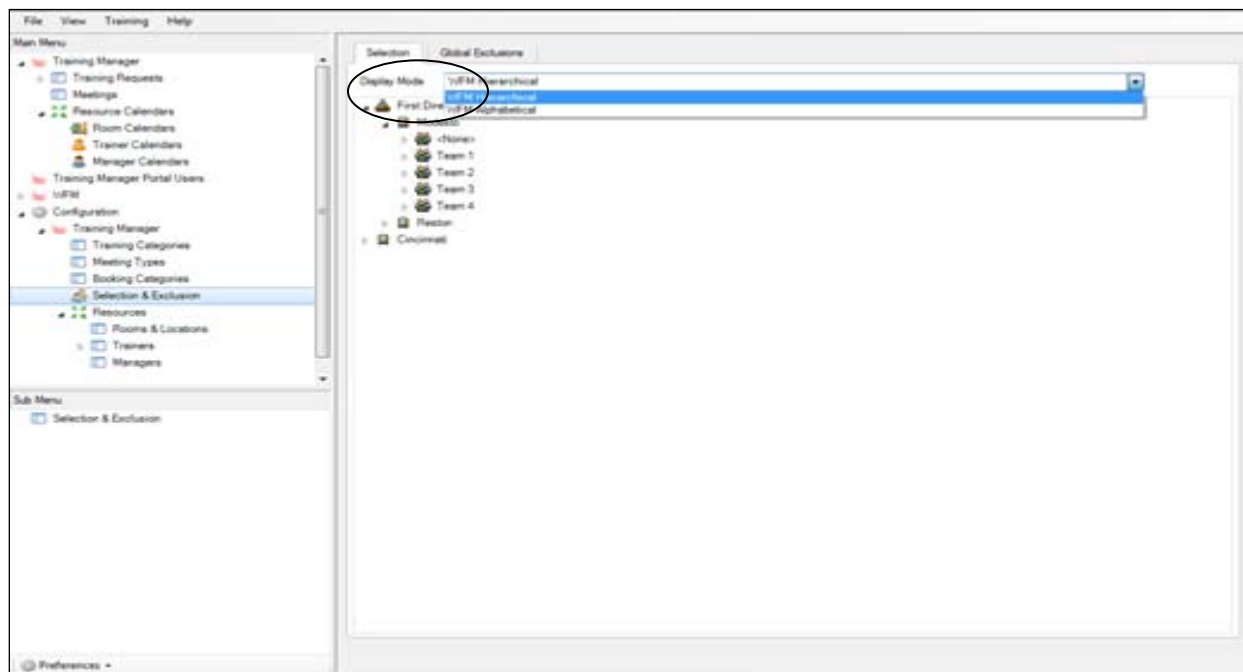
Individual agents can be selected for exclusion by right-clicking the individual and selecting `Globally Exclude`. There is also the option to view any training requests that the individual has been selected for by selecting `Completion Status`.
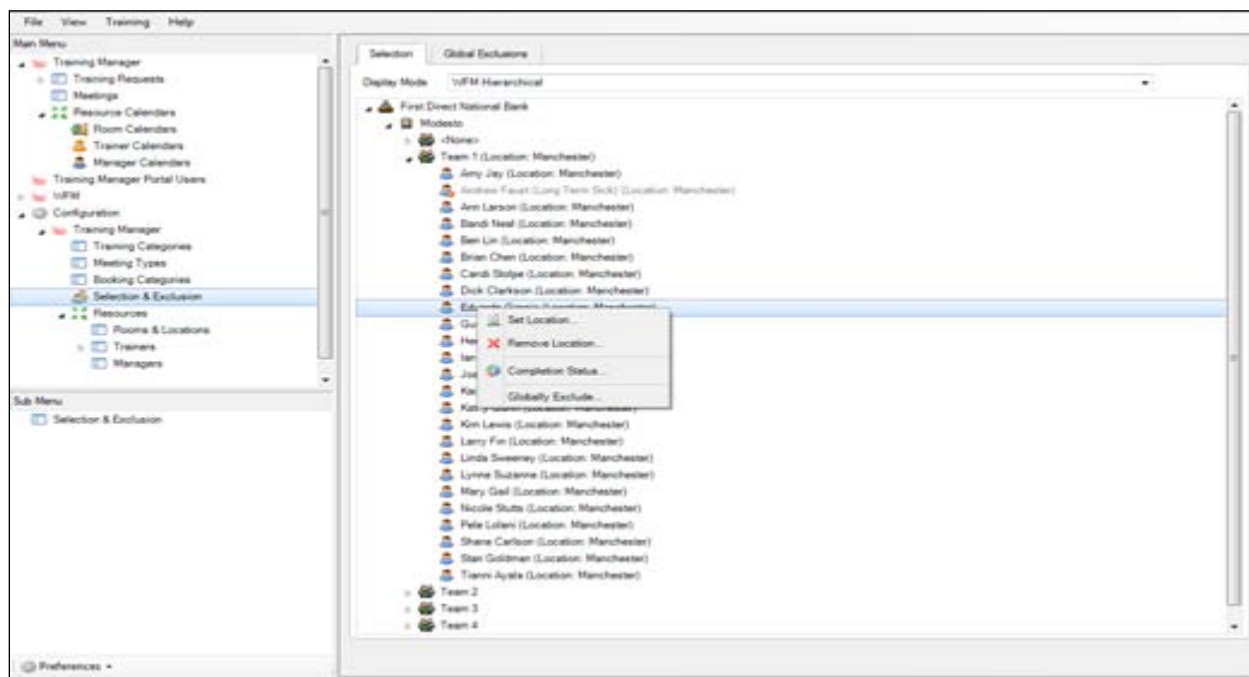
An exclusion window appears in which to enter the reason against the individual for exclusion.
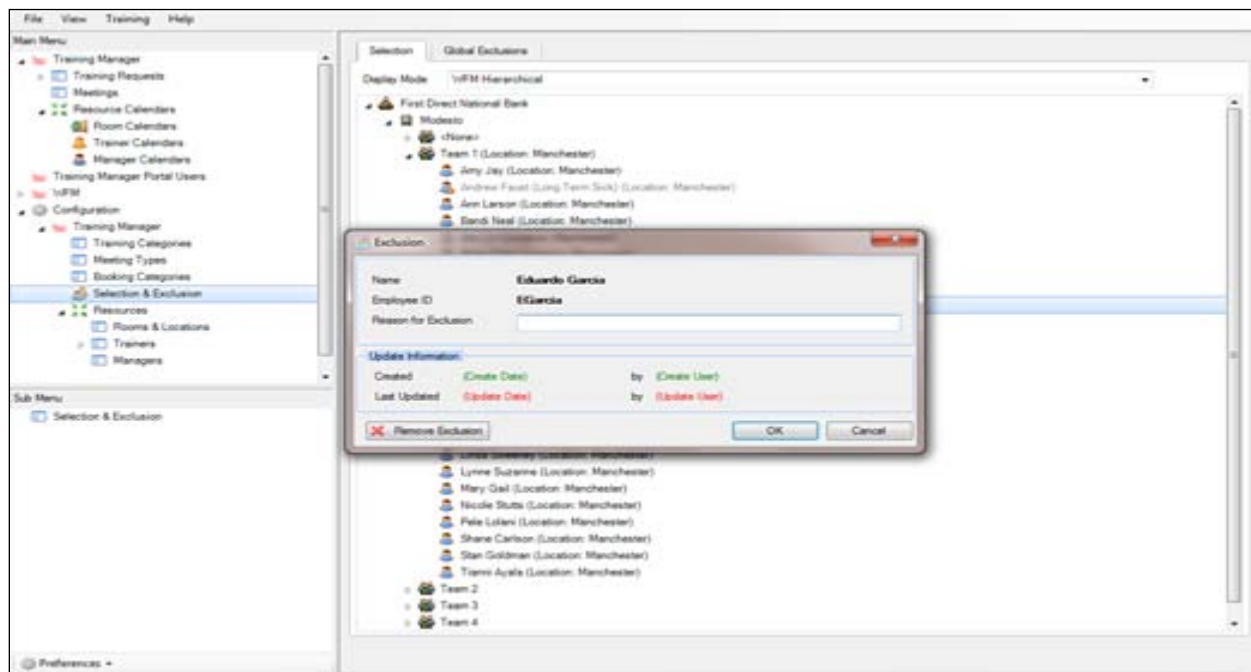
The individual will then be grayed out with the reason for exclusion appearing to the right, as in the example below. This information will appear in the Completion Status Report.
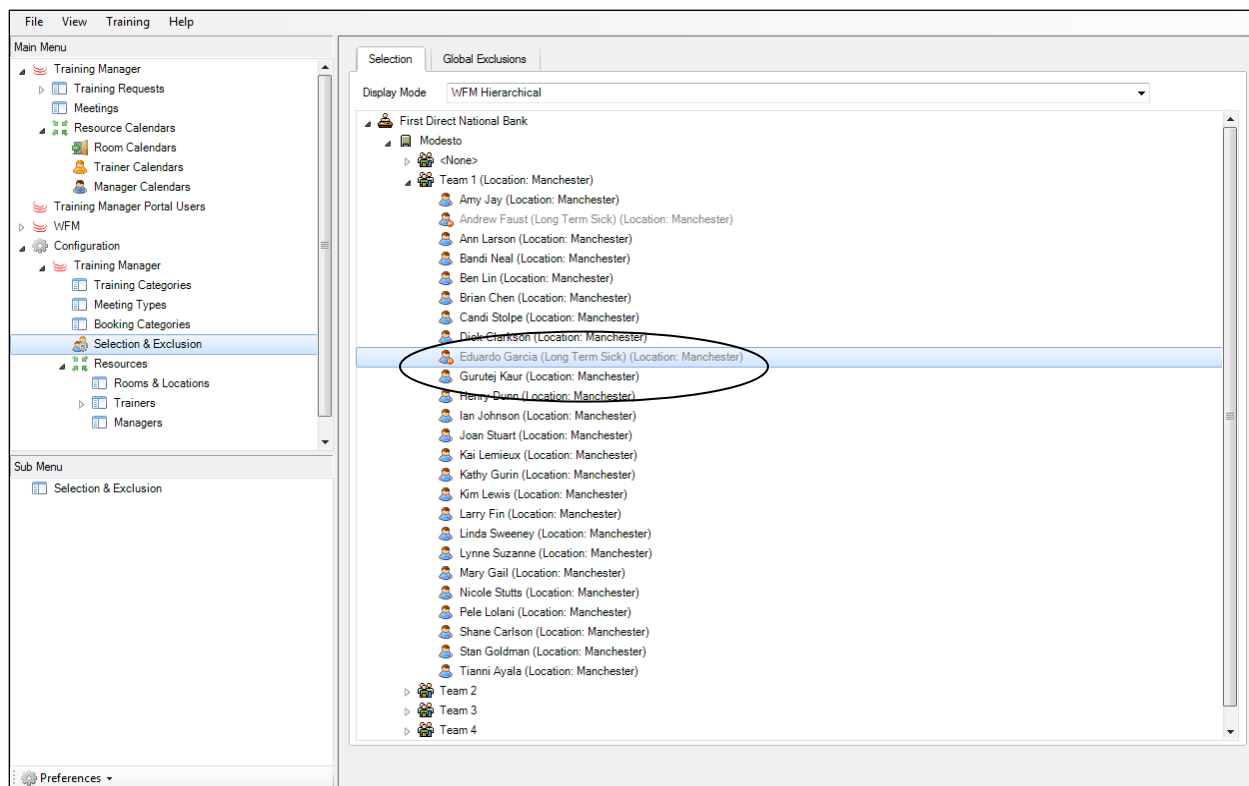
The excluded individuals will appear in the `Exclusion List` table. You can view the table by clicking the `Global Exclusions` tab.
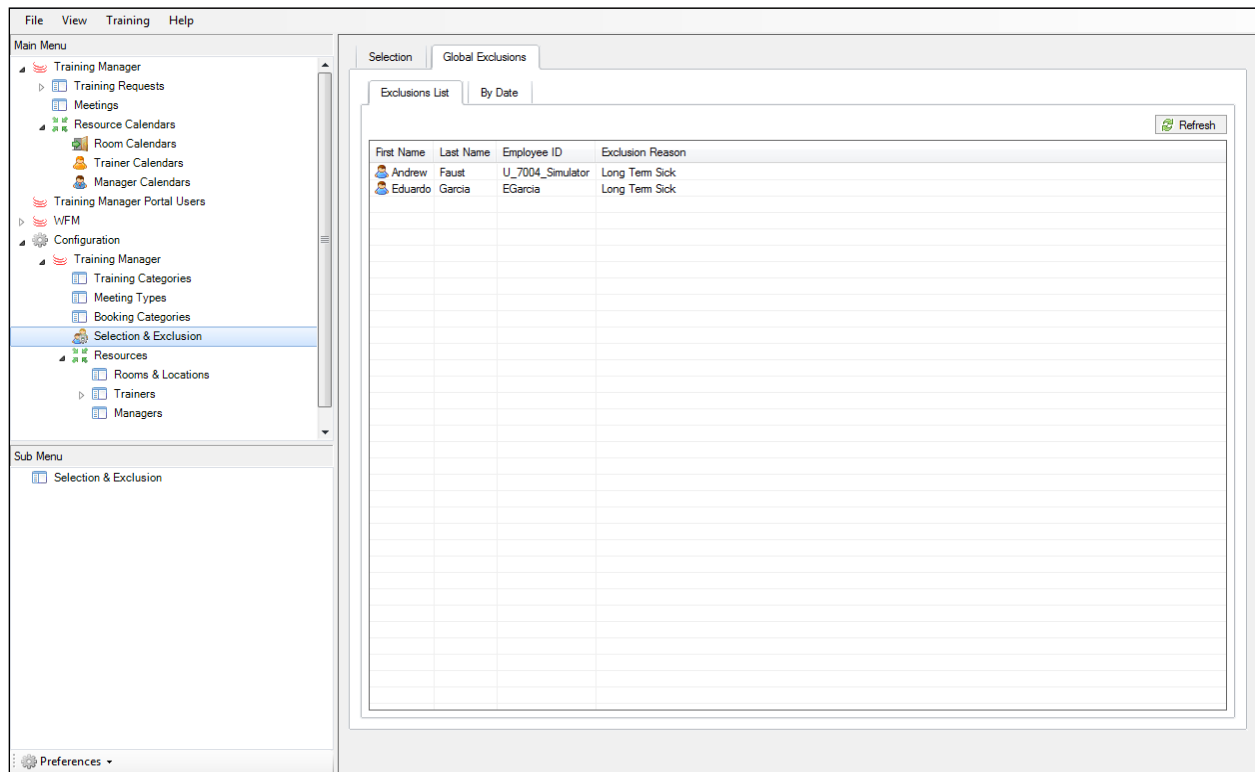
There is also the option to exclude either locations or teams for a specific date.

Click the By Date tab, and the hierarchy from WFM will appear to the right of a calendar. To exclude sites or teams for a specific date, click a date and then check the box next to the team(s) or site.
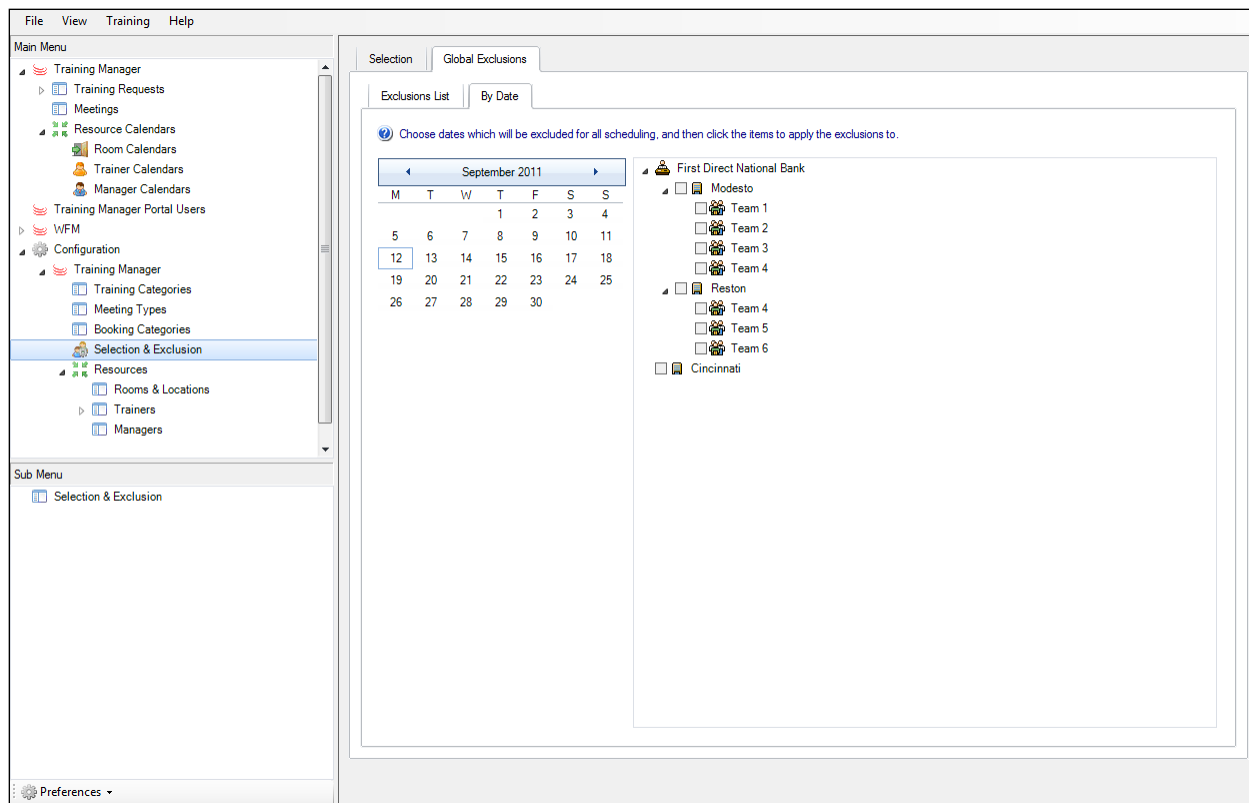
This will then highlight the date against the team.

To deselect a date and / or team, click the date and then clear the team to remove the exclusion. When an exclusion has been set, the team or site can be selected as part of a training request but will *not* be scheduled on the configured exclusion date.
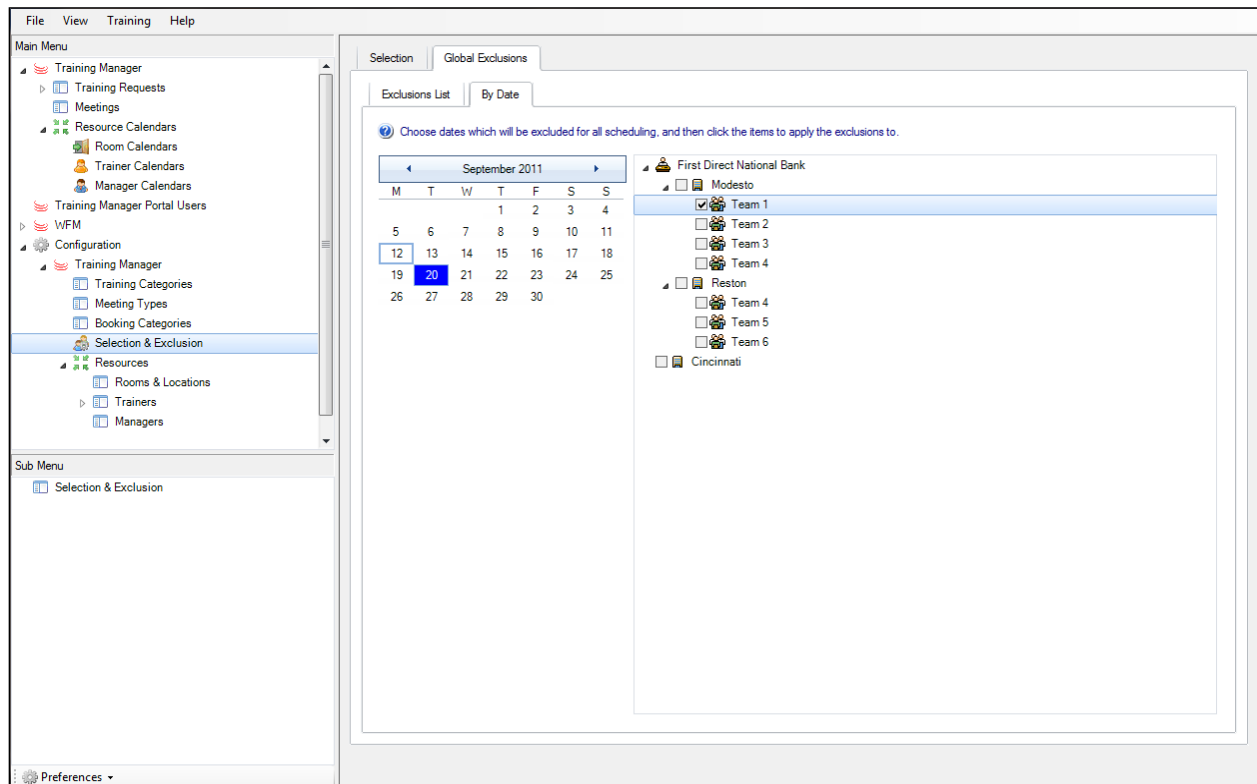
Deleting a Manager

To delete a manager, right-click the manager and select Delete Manager from the list.
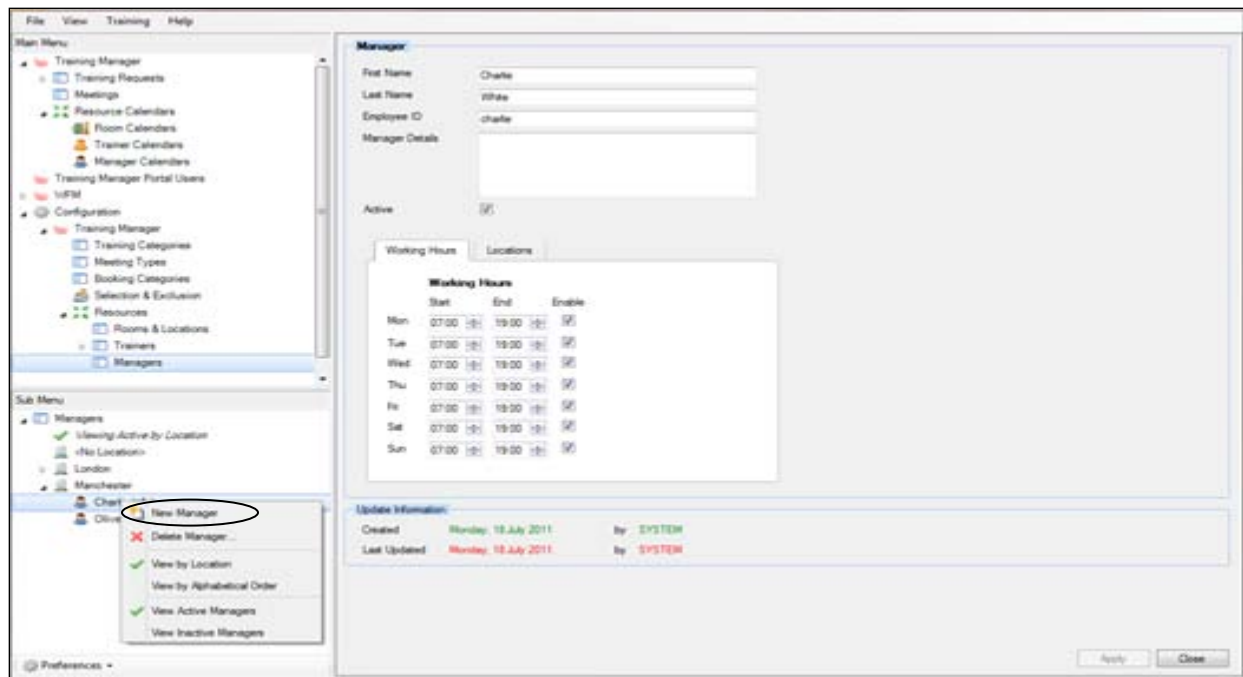
Skills Portal — Creating and Managing User Access

After selecting `Training Manager Portal Users` from the `Main Menu`, the following user options are available in the `Sub Menu`:

- `Administrators`–are manually created; see the instructions below.

- `Managers`–this portal view is automatically created when a manager is created in Genesys Training Manager. The manager does have to be granted access to it.

- `Trainers`–this portal view is automatically created when a trainer is created in Genesys Training Manager. The trainer does have to be granted access to it.

- `Agents`–this portal view is automatically created as soon as the agent has been selected for training or they have been granted access from WFM.
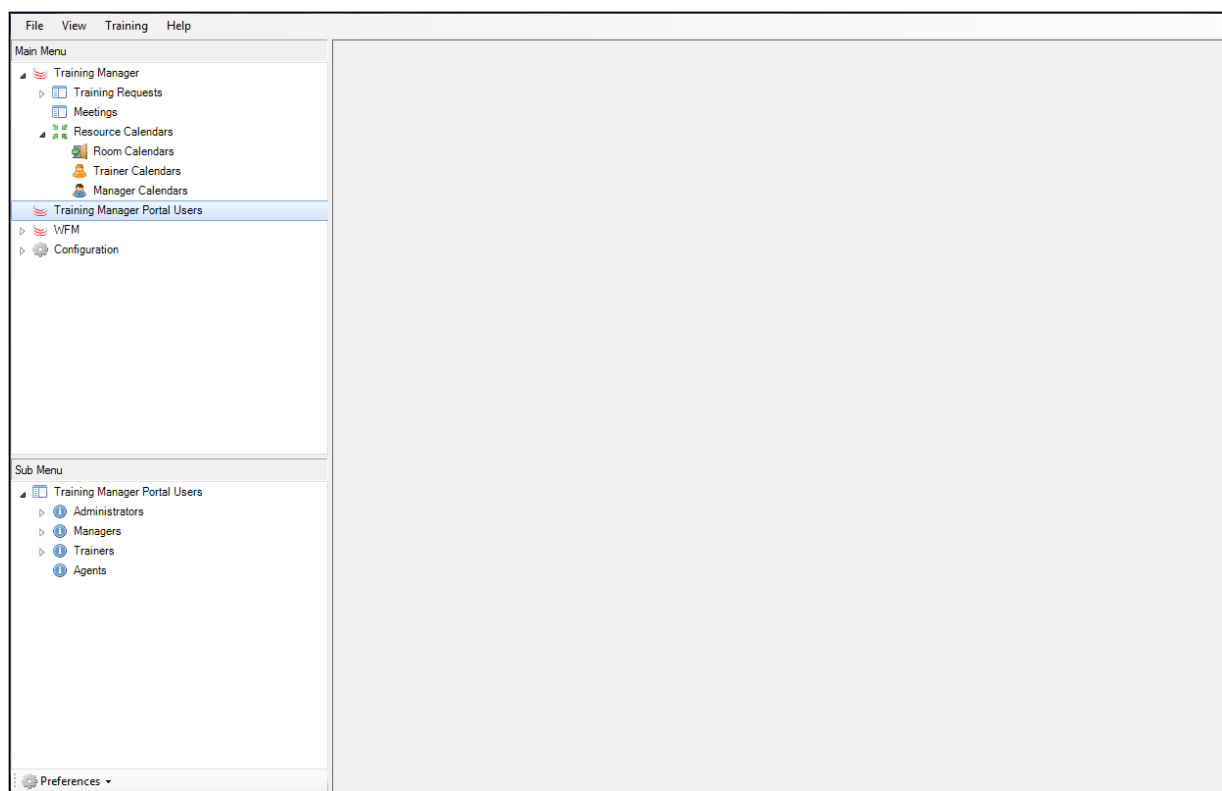
Creating a Training Portal Administrator

A new Training Portal Administrator can be created by right-clicking `Administrator` and then selecting `New Training Portal Administrator`.
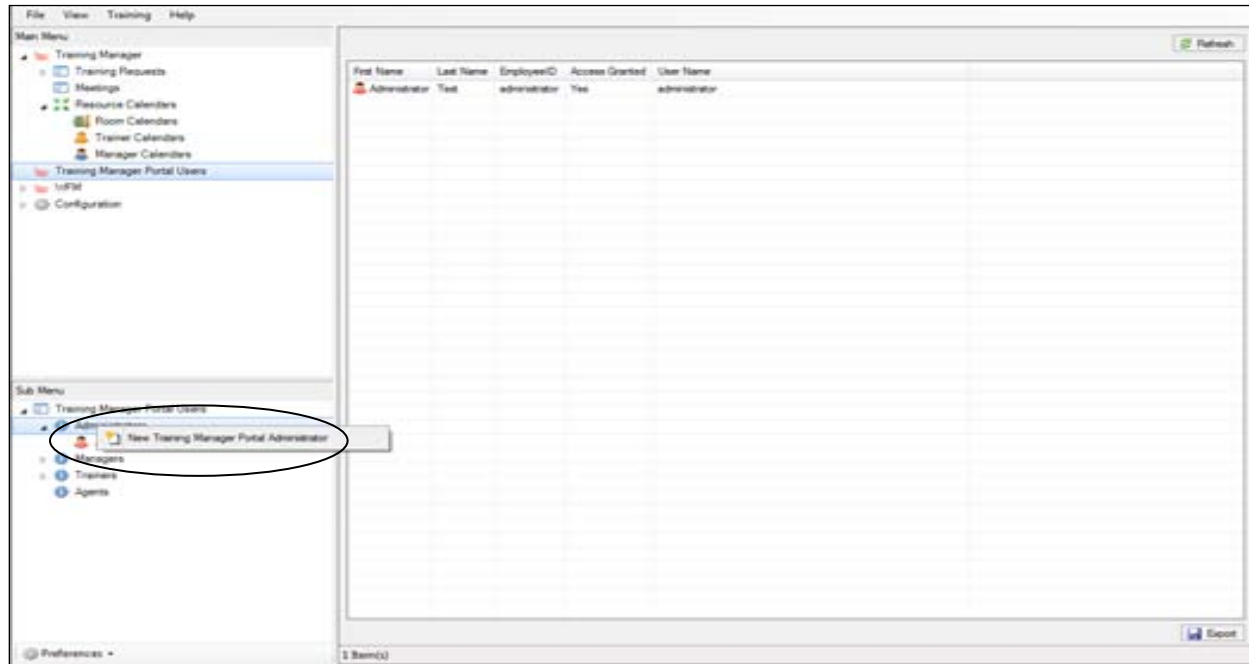
To create a new administrator, enter the required details, leaving the `Login Details` fields blank to preserve the existing password. This ensures that once the user selects the portal they are logged in automatically.

A Training Manager Portal Administrator has access to any trainer calendar, room calendar, and agent calendar.

Deleting a Training Portal Administrator

An administrator can be deleted by right-clicking the required administrator and selecting `Delete Training Manager Portal Administrator`.
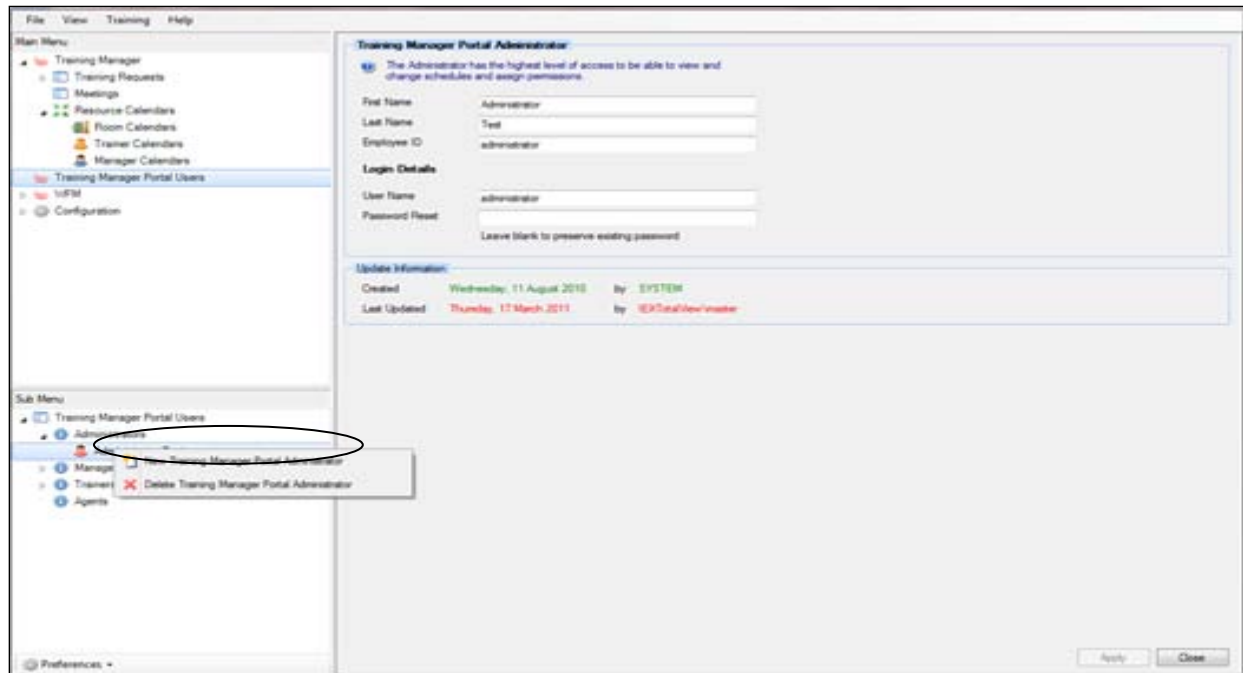
Granting Trainer and Manager Training Portal Access

Once trainers and managers exist in Genesys Training Manager, they must be granted access to their training portal. Click `Trainer` or `Manager` in the sub menu to expand the tree view, select the trainer or manager you want from the list, and then check `Access Granted` in the `Training Manager Portal Manager` screen.
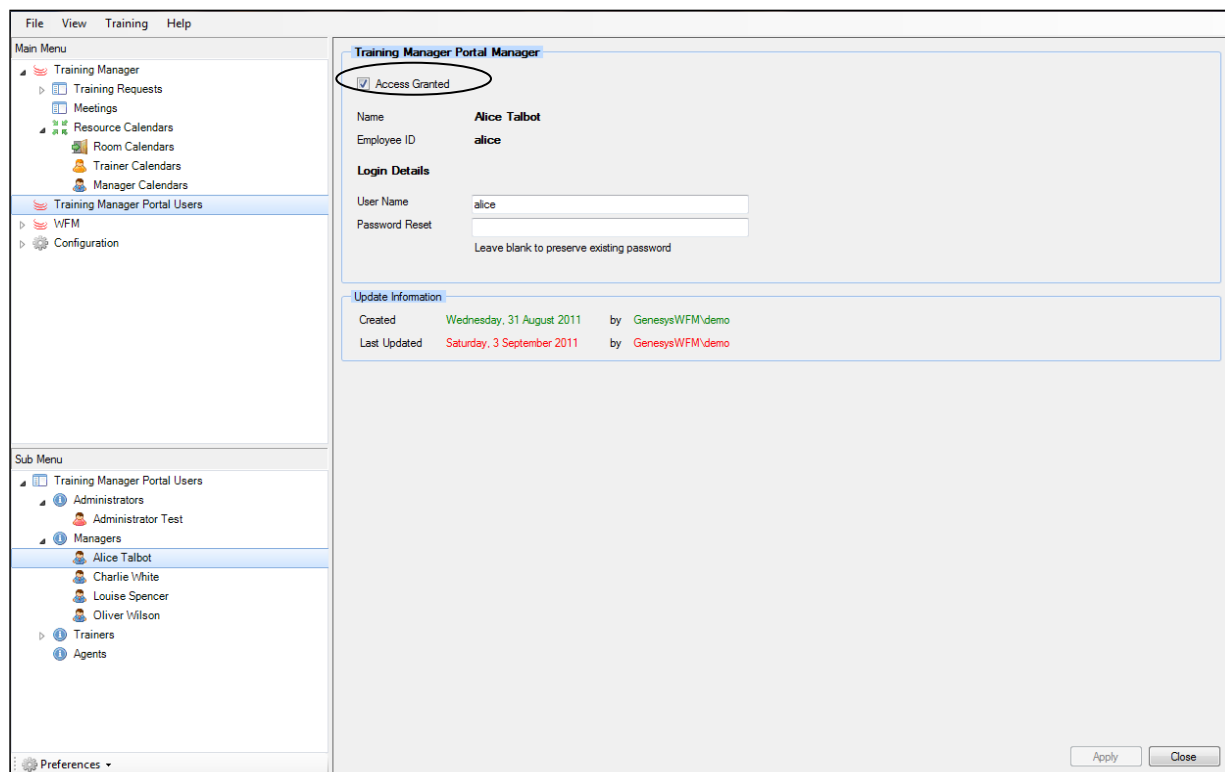
Granting User Access to the Training Manager Training Portal

There are three options for granting an agent access to the Training Manager Training Portal.

1. Agents will automatically be granted access to the Training Manager Training Portal once they have been selected from the `User Selection` tab in a training request.

2. Select `Agents` from the `Training Manager Portal Users Sub Menu`; a list of agents from WFM will appear, similar to the example below. Select `Grant access` and the WFM hierarchy will appear, allowing access to be granted at team or individual level.

3. Select `Grant access to all from WFM` and Training Manager will grant access to the Training Manager Training Portal to all agents who are in WFM. If there are any agents not in WFM, Training Manager will remove their access. It is recommended that if this option is selected, it is done out of hours. Depending on how the agent accesses their webportal if they have to login, then their `User Name` will be their surname and their `Password` will be password.
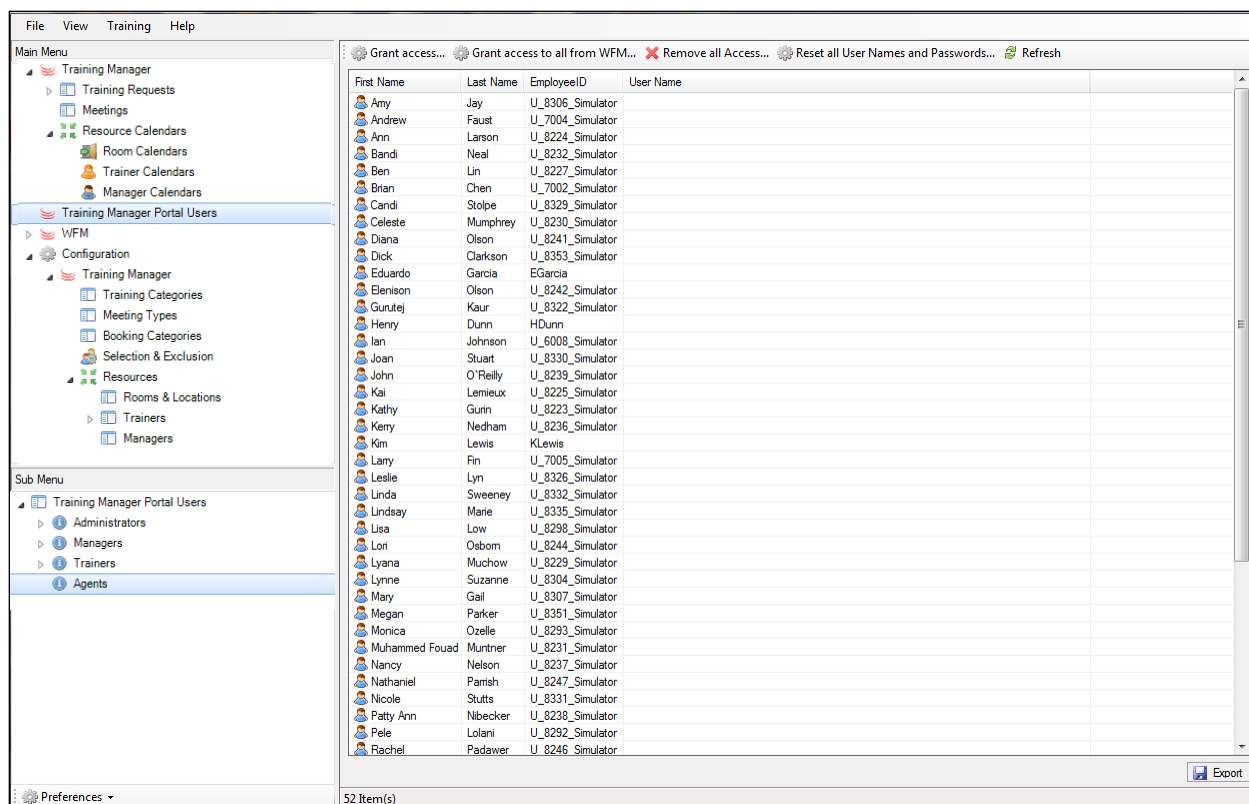
Managing the Welcome and Header Titles in Training Manager Portal

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

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

There are now Authentication options available in the `Training Manager Portal Configuration` window.

Amend the welcome and header titles here.

Manage visibility in Training Manager.

Manage the manager freeze window, i.e., the number of days that cannot be edited.
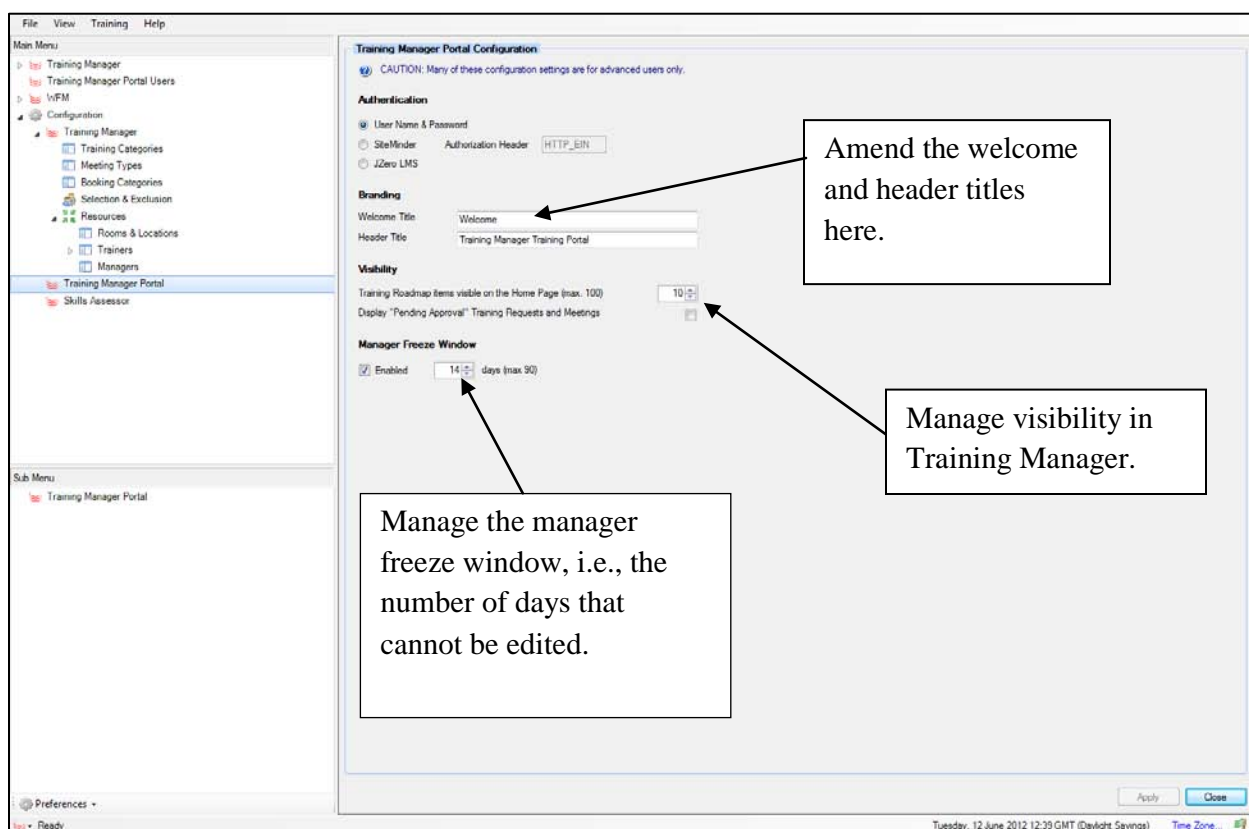
`Training Manager Portal` home page view.

Training Roadmap visibility in the `Training Manager Training Portal`.

In the example below, a maximum of 10 Roadmap items will be visible on the home page.

Managing Room Bookings

Once rooms have been created they can be included as part of the optimized scheduling process.

The calendar management of the room must be kept up-to-date, as the application will avoid using any rooms that are not available.

Any scheduled room activity will automatically update the room calendar.

To manually enter a room booking, select `Room Calendars` from the `Main Menu`.

A similar tree view will appear in the `Sub Menu` listing all of the locations.
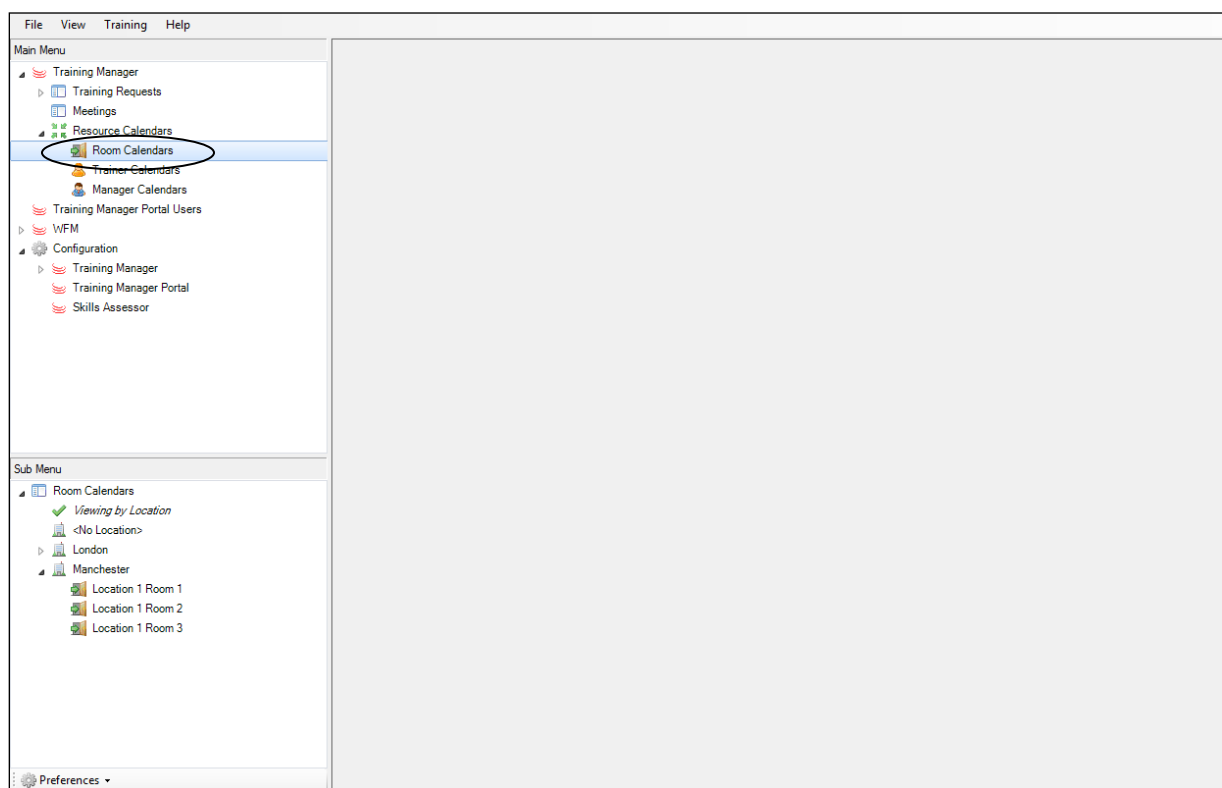
When you expand the location a list all of the rooms associated with it appears.

Right-click the required room and the New Room Booking option appears.
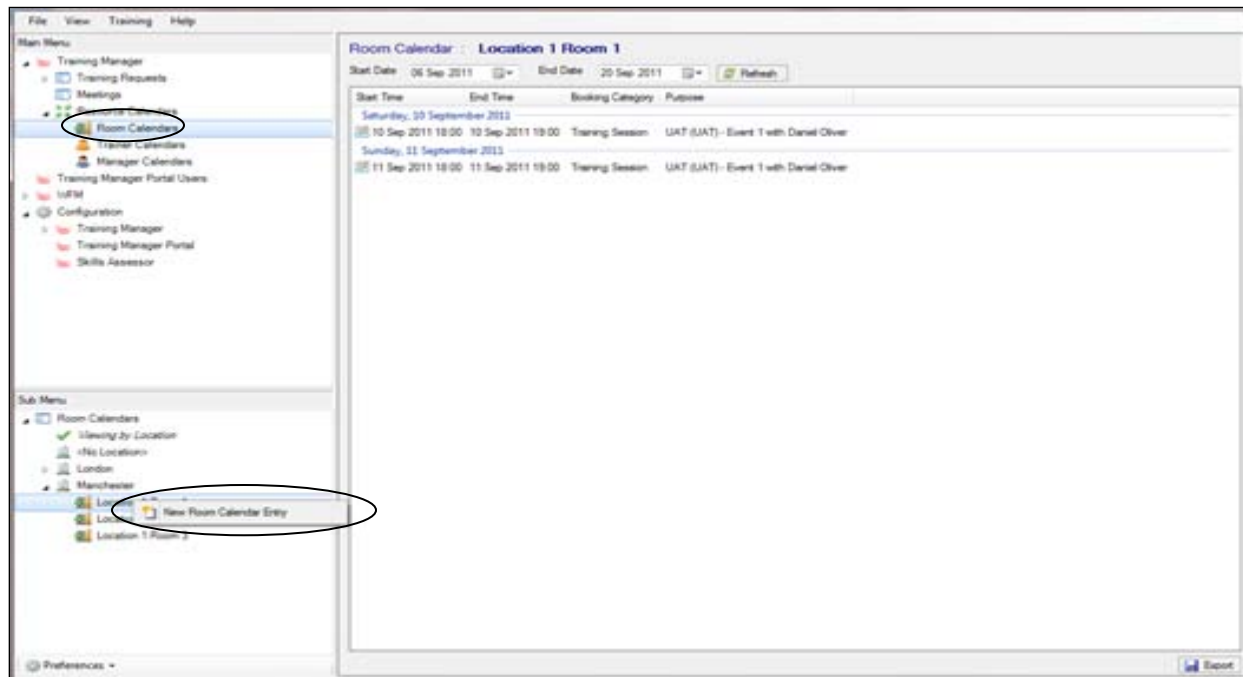
After selecting New Room Calendar Entry, the room booking form appears.

Complete the details as required and click `Apply`.

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

Only manually entered room bookings can be deleted in the Room Calendar.

Deleting a Manual Room Booking

To delete a manually-entered room booking, right-click the calendar entry and then select `Delete Calendar Entry`.

Genesys Training Manager will not allow deletion of any scheduled training activity in the Room Calendar.
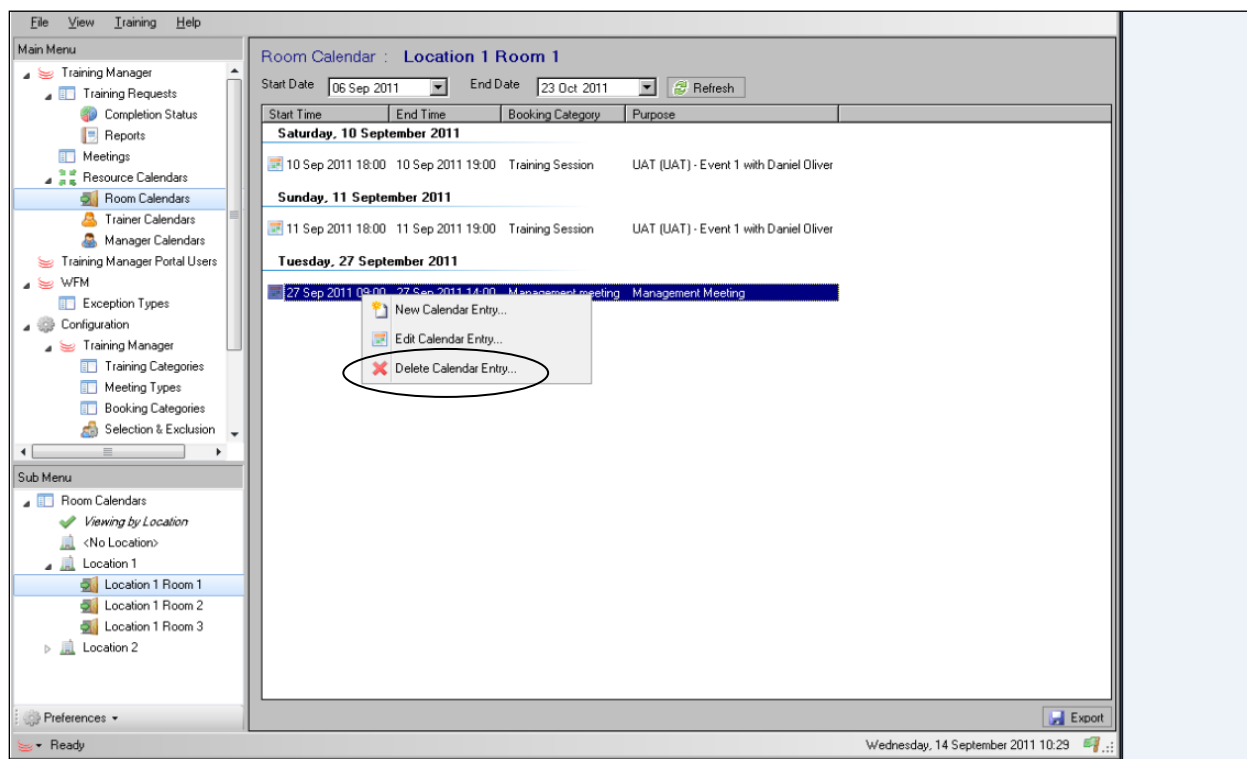
Enhanced Trainer Configuration and Visibility

Trainer Hierarchy

The ability to create trainer hierarchy is now available in the `Trainer` menu option.

After selecting `Trainers` from the `Main Menu`, select a specific trainer. The `Working Hours` tab will be available in the `Trainer` screen (in the example below, the `Sub Menu` view is `View by Alphabetical Order`). The option is now available to assign a manager from a drop-down list.

To view the trainer manager hierarchy, change the `Sub Menu` view to `View by Hierarchy` by right-clicking the `Trainers` option in the `Sub Menu`.
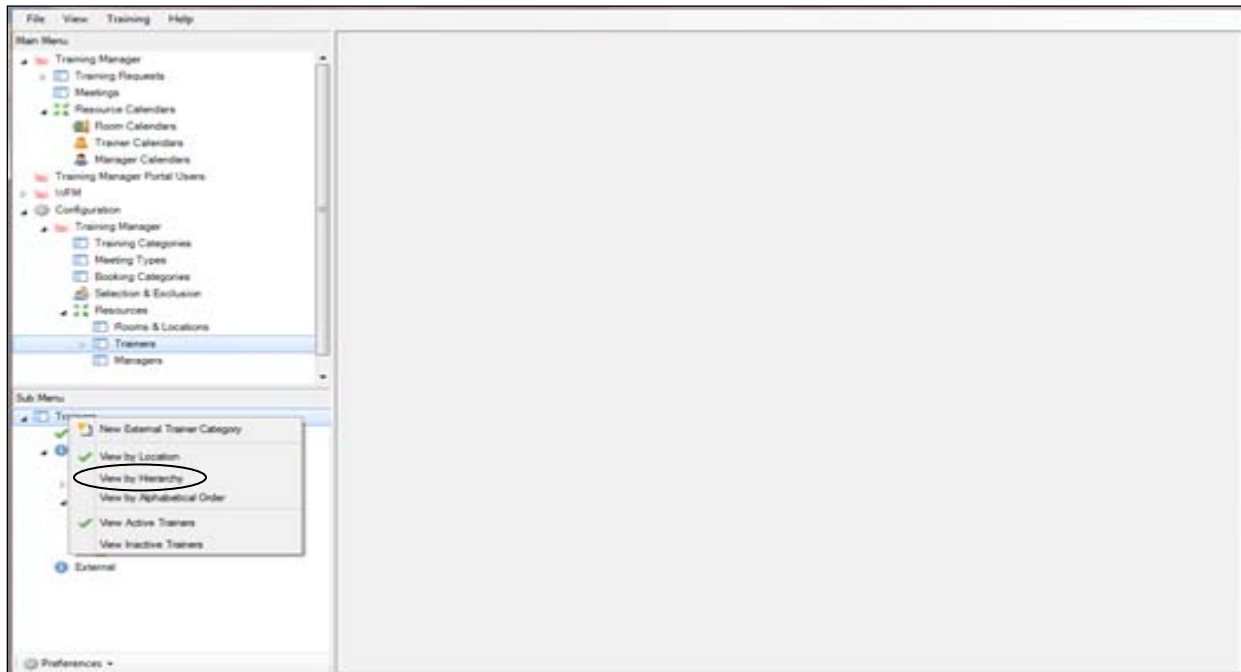
Expanding the detail in the `Sub Menu` will display the trainers that report to the trainer manager.
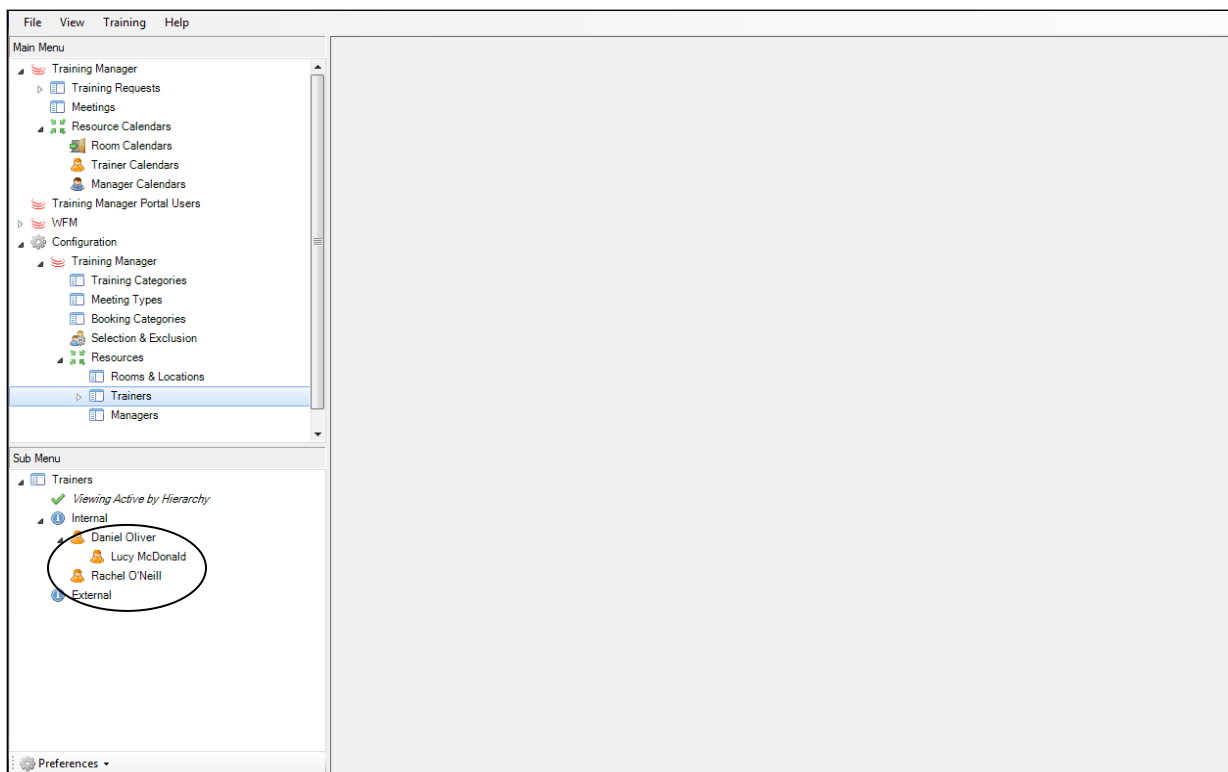
The trainer manager can view the trainers associated with them and can select to view their activity in the training portal.
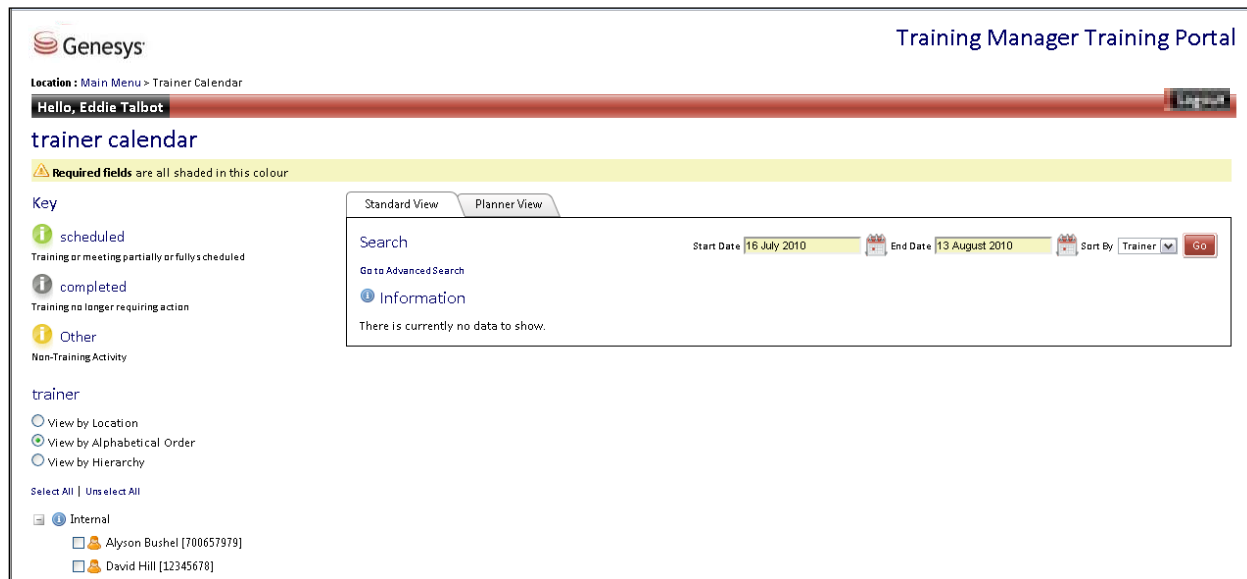
Trainer Calendar

Trainer Calendar non-availability is managed either by updating the trainer calendar in Genesys Training Manager, or individual trainers updating their web portal calendars.

To manage trainer availability in Training Manager, select `Trainer Calendar` from the `Main Menu`. The locations are then listed in the `Sub Menu`. Right-click `Trainer Calendar` to amend the view if required.

To create a new calendar entry, right-click the required trainer and select `New Trainer Calendar Entry`. There are also the options available to change the view.
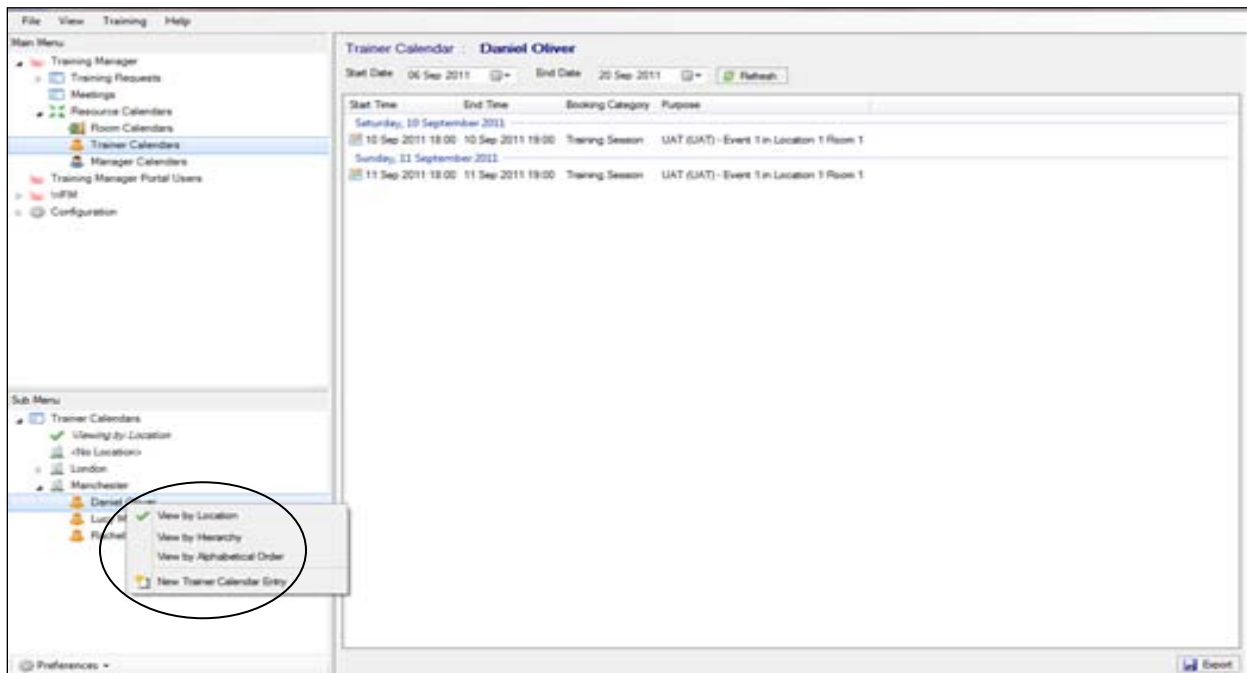
Complete the details as required; select `Booking Category` from the drop-down menu, and then click `Apply` once all of the details have been entered.
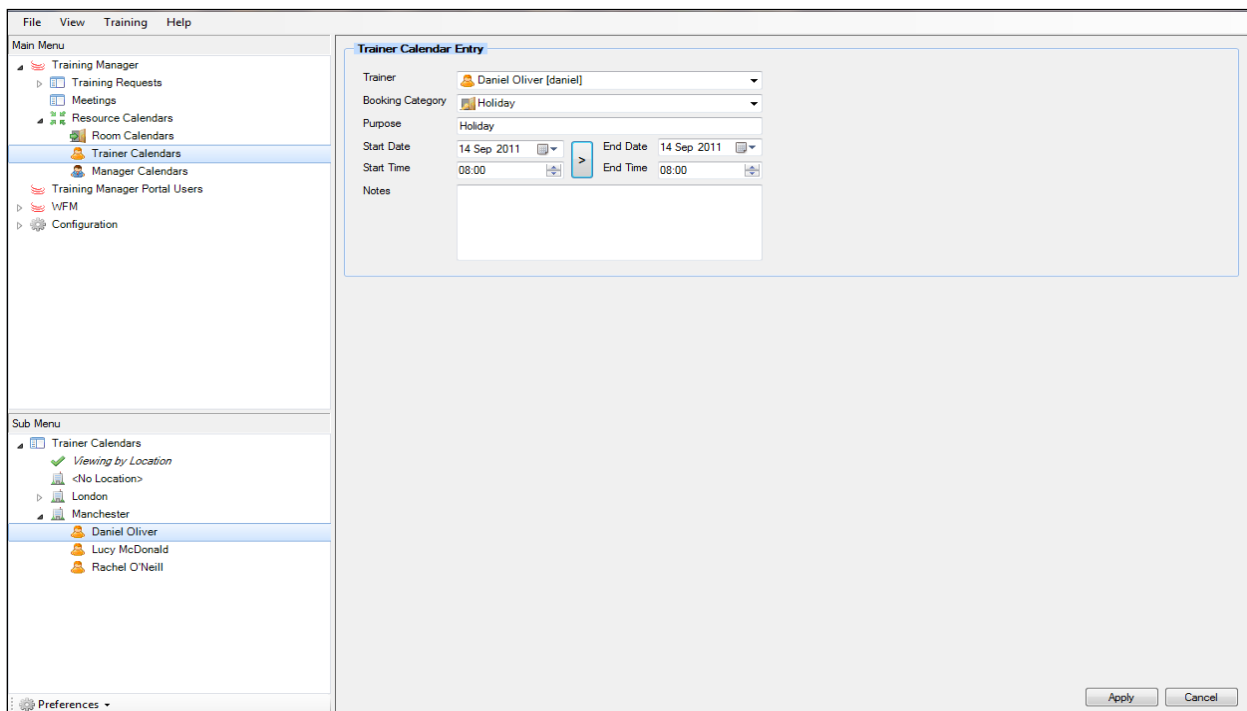
To delete a Trainer Calendar entry right-click the calendar entry and select `Delete Calendar Entry`.
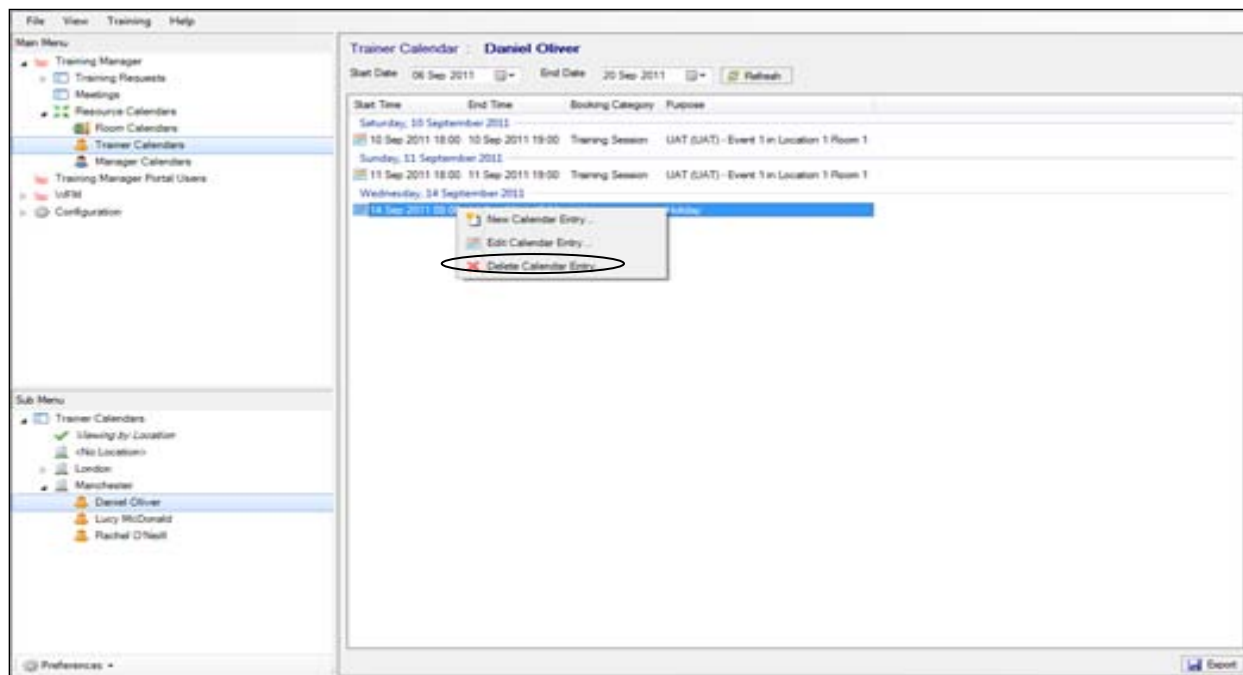
The trainer can also manage their availability through their training portal. The option to insert any new activity is available within the `Planner View` of the `Trainer Calendar` by right-clicking in the calendar and selecting `New Entry`.
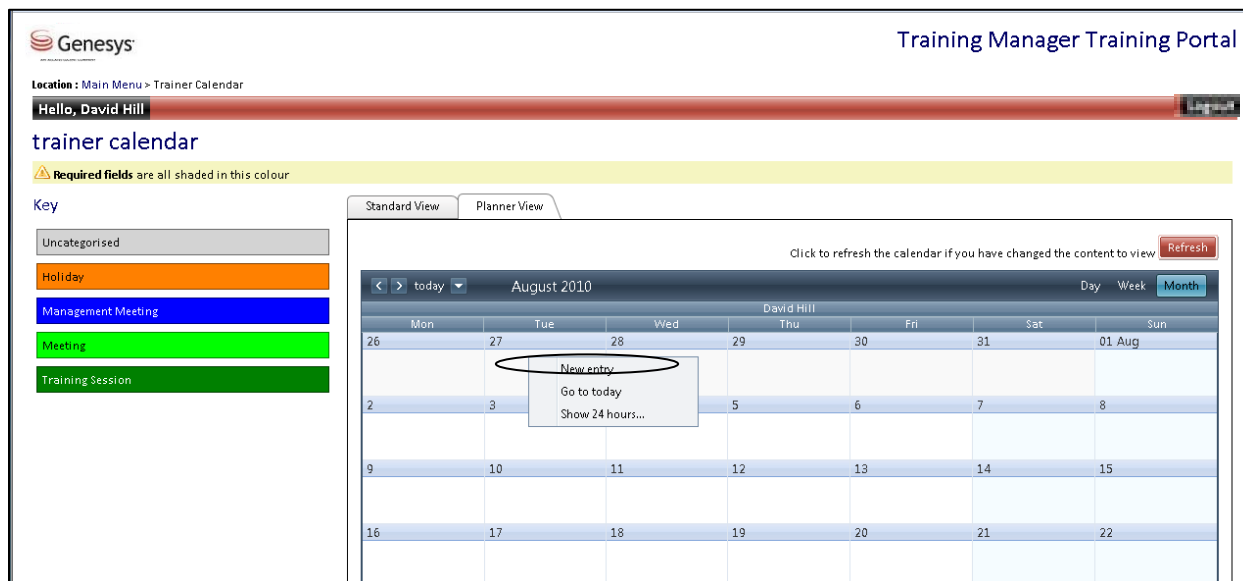
Configuration

Training Categories

The training categories are linked to the exception codes in Genesys WFM, and a training category must be selected when raising a training request. When training is scheduled it is the exception code that is displayed in the agent schedules, and therefore must already exist in WFM. Genesys WFM takes into account the impact of the exception code on the staffing levels as part of the WFM configuration.

To create a new training category, select `Training Categories` from the `Main Menu`; a list of existing categories appears in the `Sub Menu`.

Right-click `Training Categories` in the `Sub Menu` and the `New Training Category` option appears.
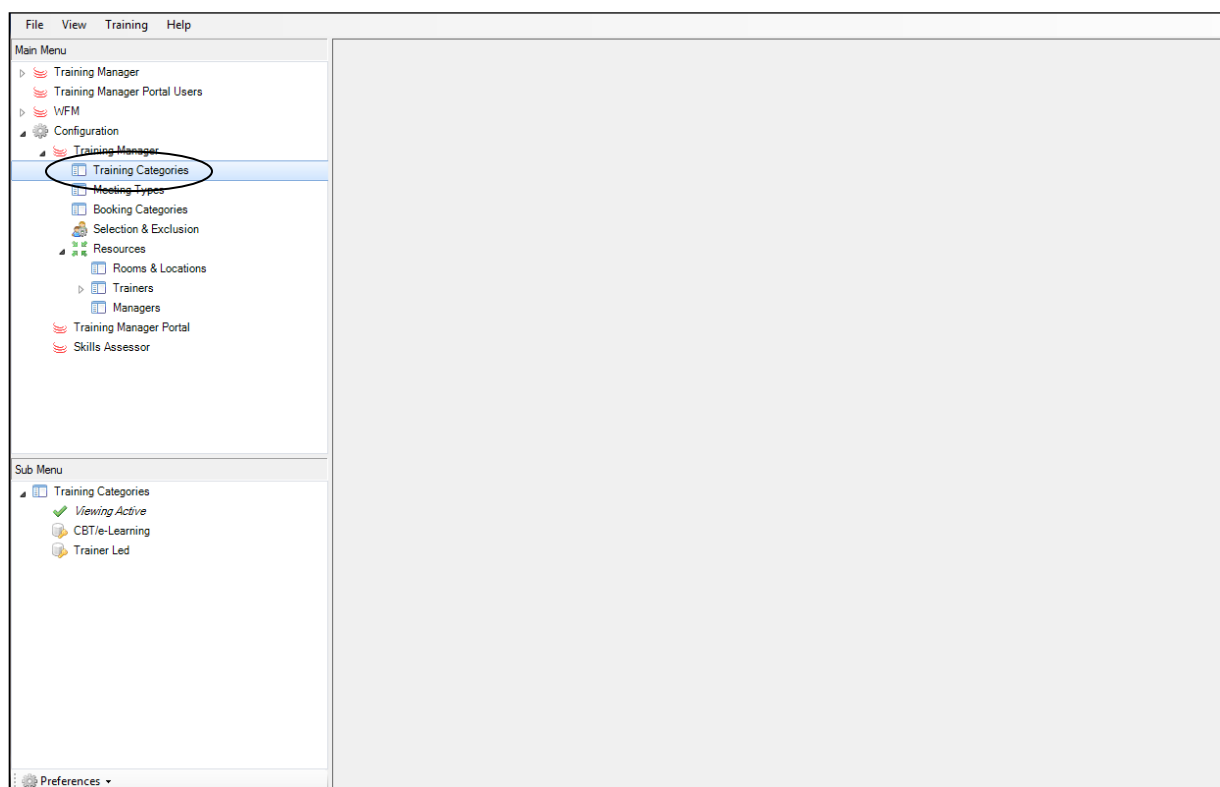
After clicking `Training Categories`, any existing categories are displayed in the `Sub Menu`.

To create a new category, right-click `Training Categories` in the `Sub Menu` and select `New Training Category`.
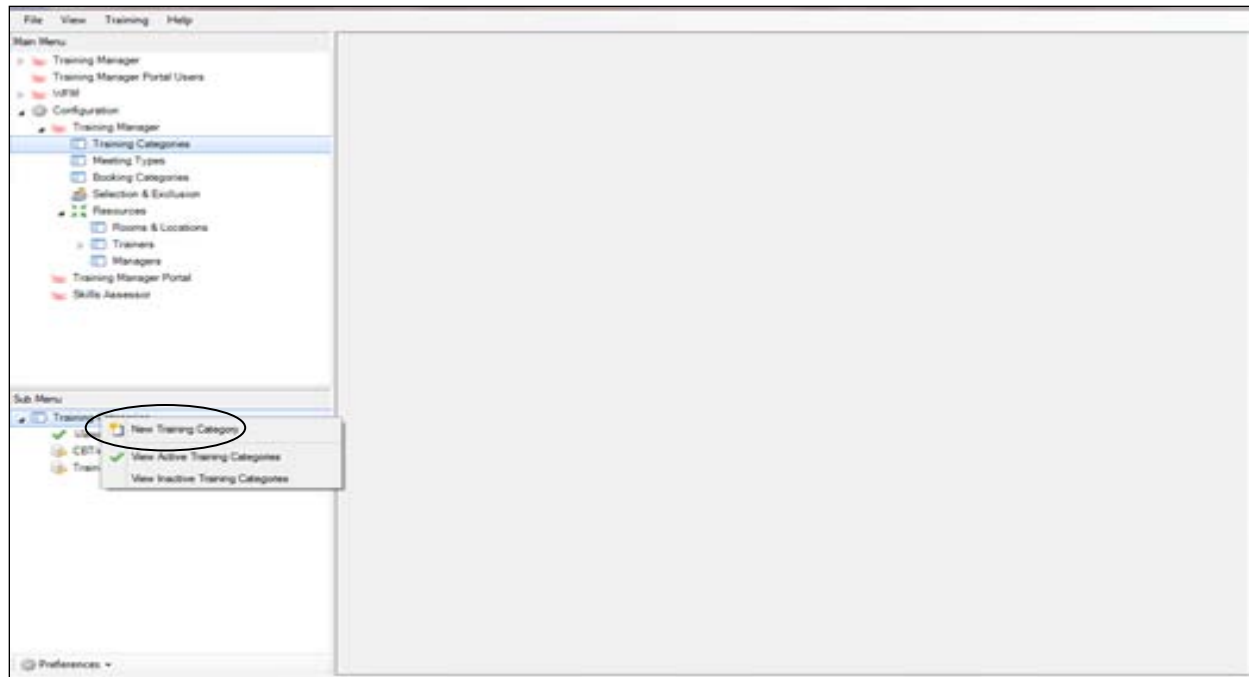
Enter a new name together with any relevant notes.

Click `Choose` and a list of all available exception codes from WFM will appear. You can then select which exception code to associate with the new training category. After selecting the required exception code, click `OK`, and then click Apply.

Please note that Genesys Training Manager does *not* create exception codes in WFM.
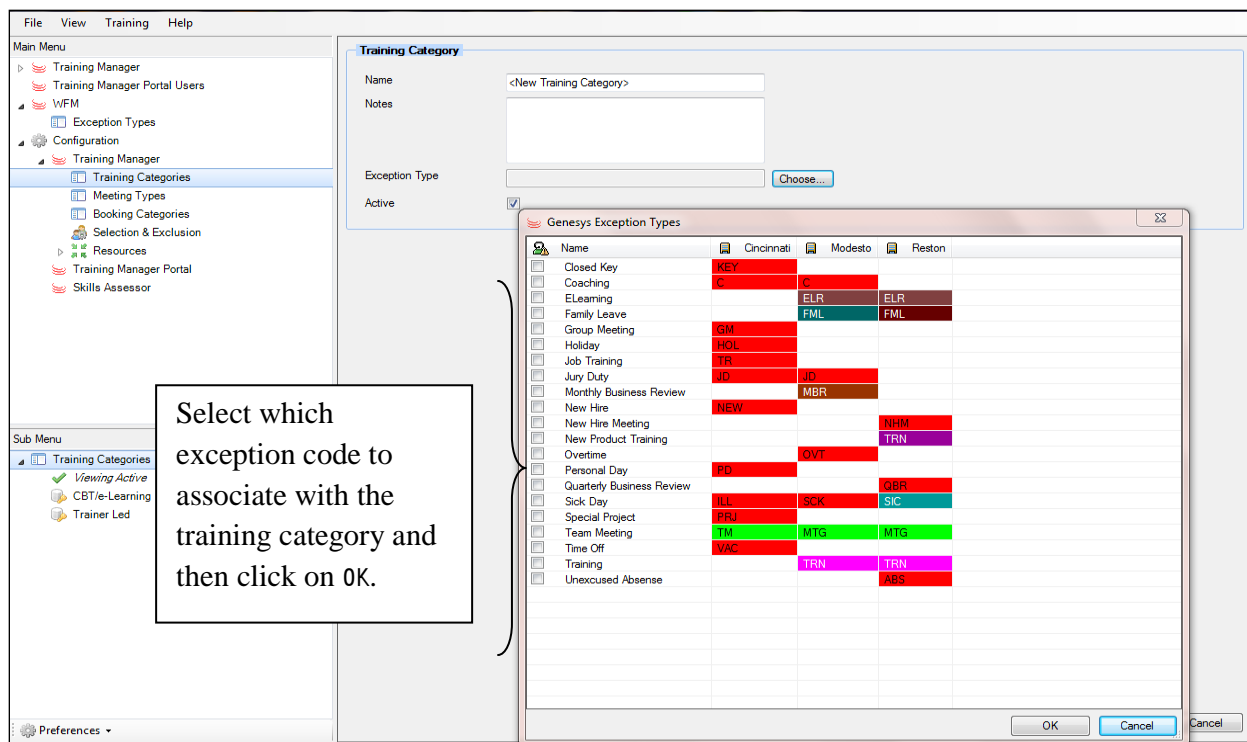
Deleting a Training Category

To delete a training category in Genesys Training Manager, right-click the training category and select `Delete Training Category`.
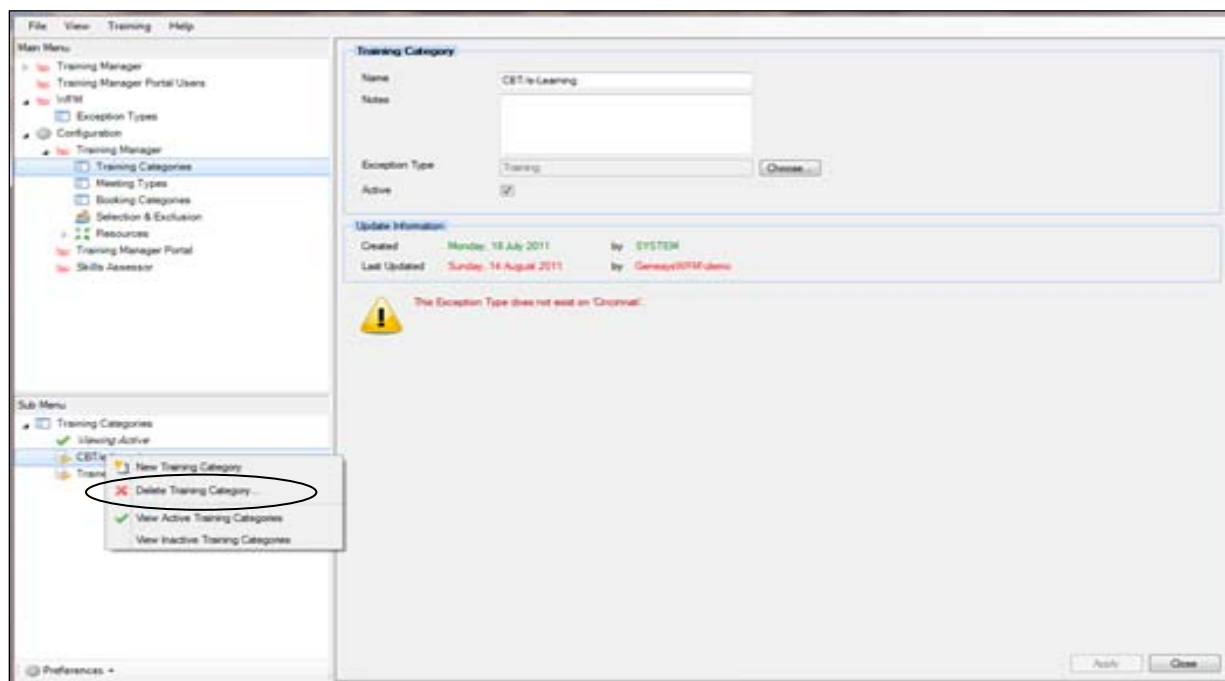
Meeting Types

Meeting types are used when creating and scheduling meetings and one-to-ones that include the team manager. Different algorithms have been created to manage team group meetings or individual agent meetings which include the team manager. These algorithms must be associated with the correct meeting type.

Select `Meeting Type` from the `Main Menu`. Any existing meeting types are now visible in the `Sub Menu`.
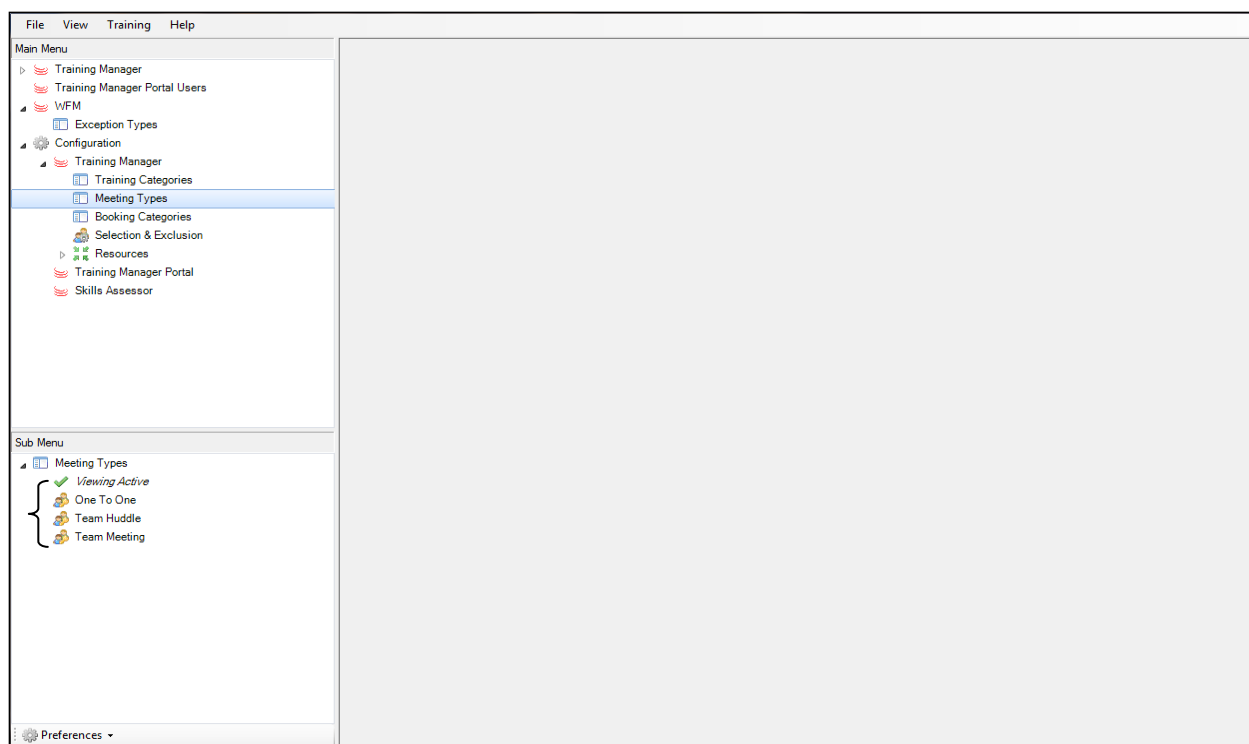
To create a new meeting type, right-click `Meeting Types` in the `Sub Menu` and select `New Meeting Type.`
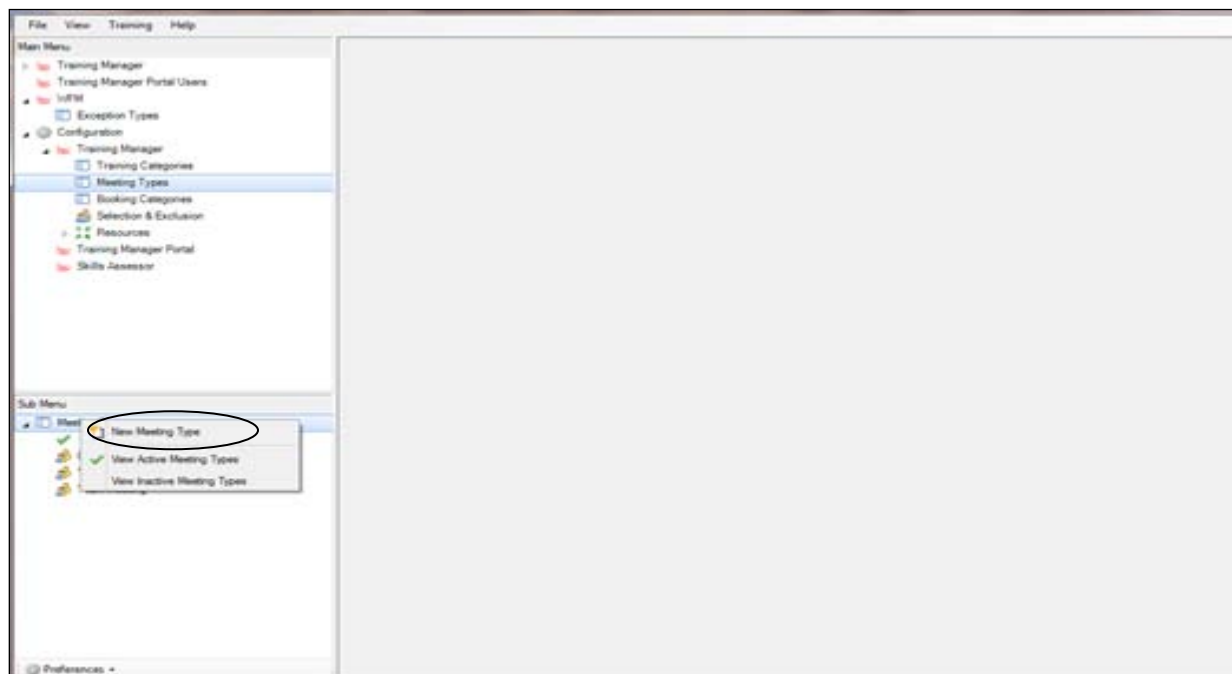
Complete the details as required, selecting the correct booking algorithm from the drop-down menu:

- `Meeting`–Group and team manager
- `One To One`–individual agent and team manager

Meeting types are configured the same way as training categories. As with training categories used in training requests, the WFM exception code must already exist in WFM and exactly match the `Default WFM Exception` code entered.
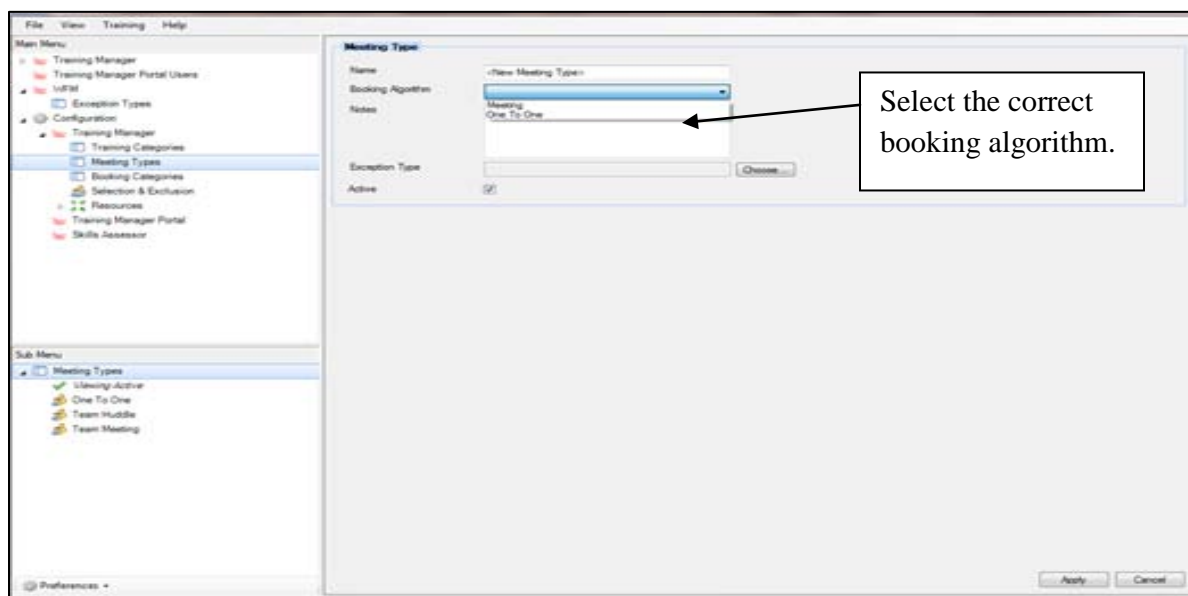
Click Choose to select the exception code in WFM from the available exception type matrix as in the example below.

After selecting the exception code you want, click OK and then click Apply to save your selection.
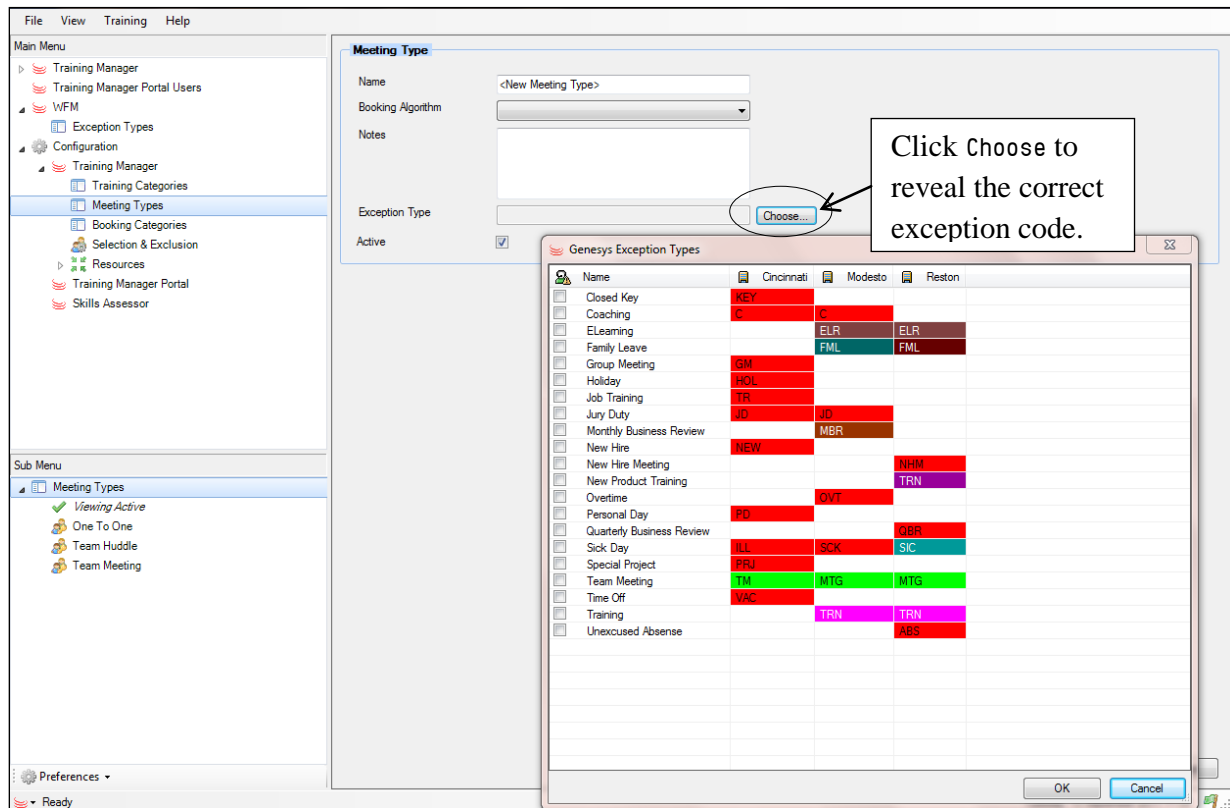
Deleting Meeting Types

Delete a meeting type by right-clicking the meeting type and selecting `Delete Meeting Type`.
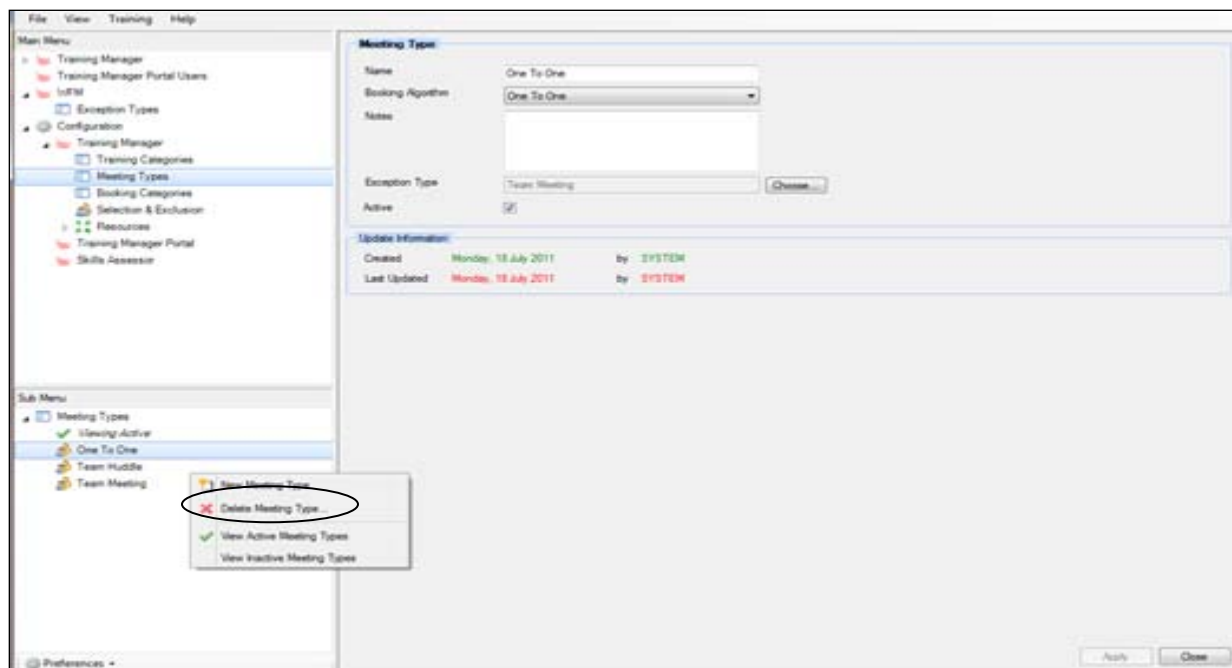
Booking Categories

Booking categories are created for use in the webportal for recording non-available time for managers and trainers.

Management meeting and Training session booking categories are for use when scheduling training and meetings in Training Manager and cannot be deleted or amended.
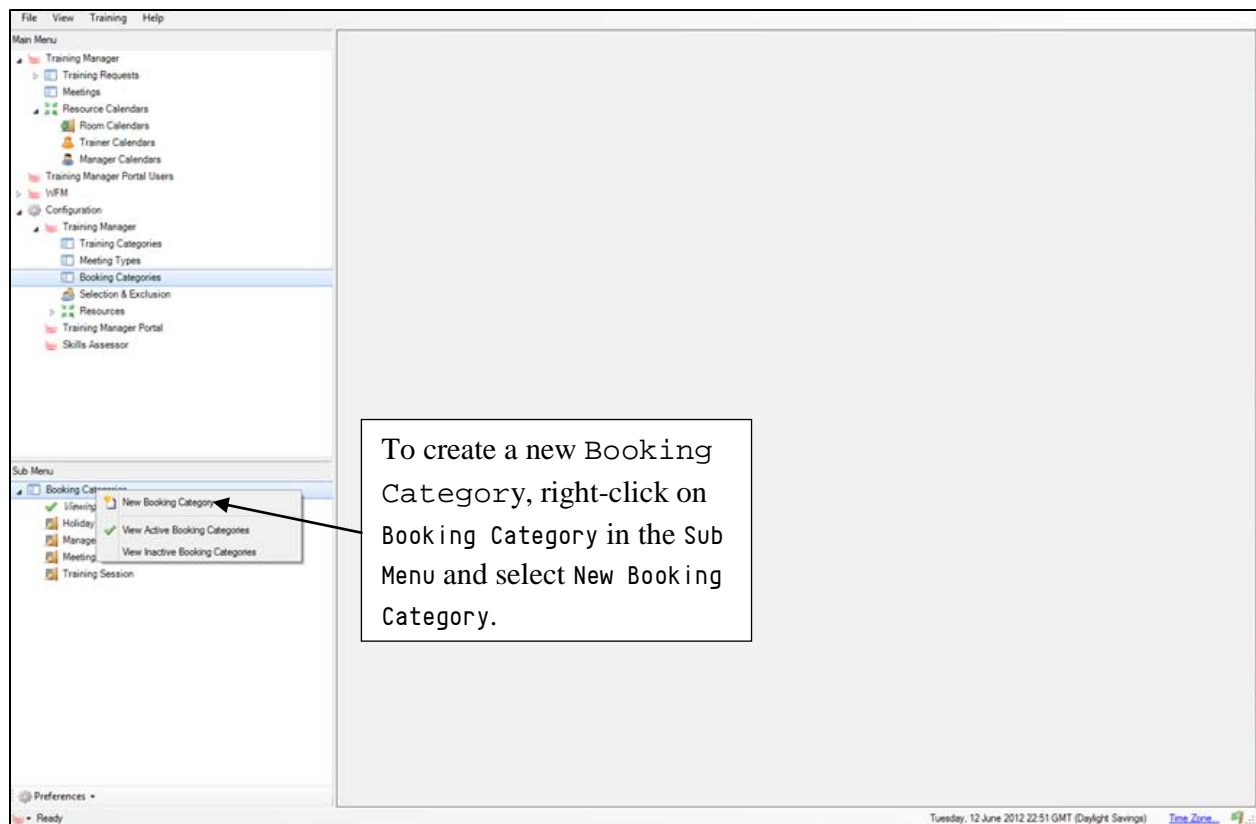
Give the booking category a name and select a color to be displayed in the webportal.

There are several options now available for selection:

- Room Calendar Category–Selecting this in the booking category applies to the room calendar. *This would not be applicable if the booking category was holiday.*

- Trainer Calendar Category–Selecting this in the booking category applies to the room calendar.

- Manager Calendar Category–Selecting this in the booking category applies to the room calendar.

- Is Working Time–This is not selected if this booking category does not constitute working time, e.g., personal time which is unpaid by the organisation.

- Active–The booking category is active and available for selection.
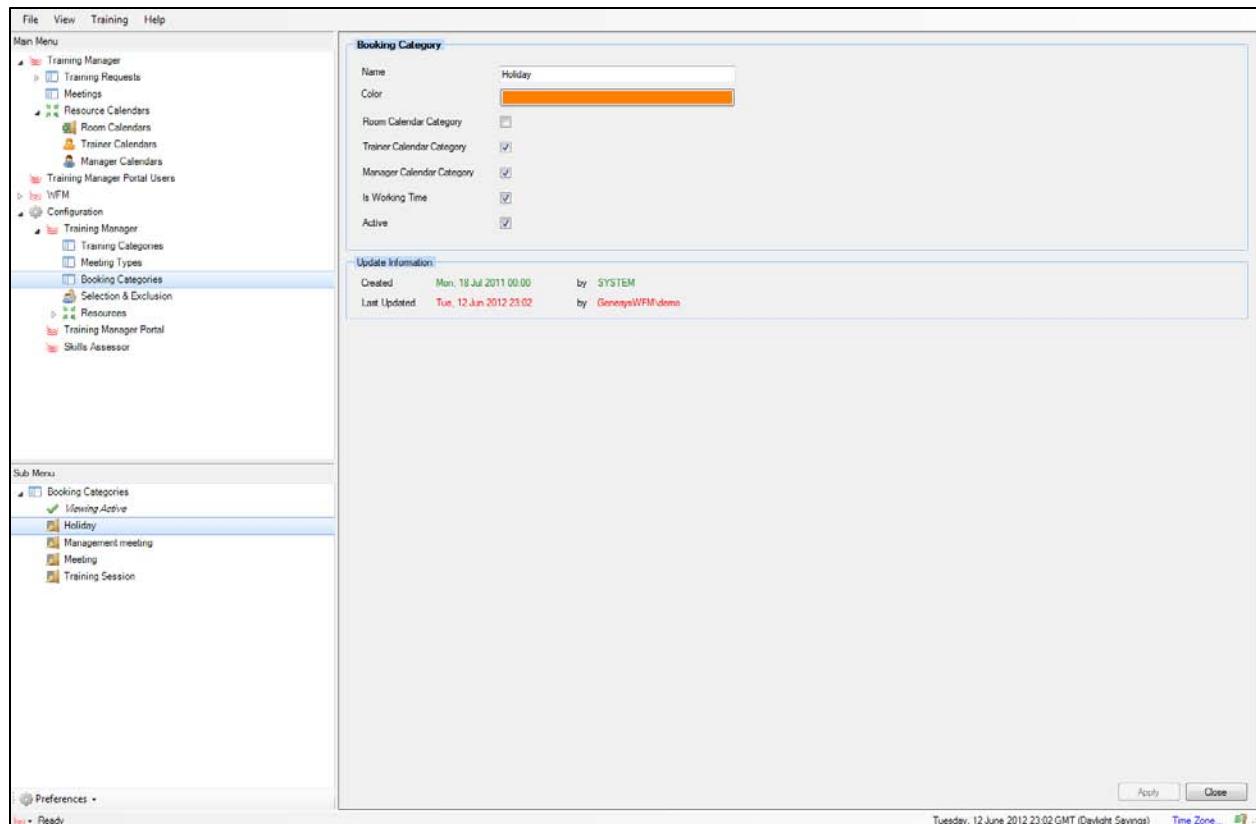
Raising a Training Request

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

Training requests can be created by either right-clicking `Training Request` in the `Sub Menu`, or clicking the `Training` option above the `Main Menu`.

Create a training request through the relevant status option; for example, `Pending Approval`, and the application will automatically store the request.

File   View   Training   Help

Main Menu

▲ ≋ Training Manager
   ▷ ▦ Training Requests
        ▦ Meetings
   ▲ ⬓ Resource Calendars
        📷 Room Calendars
        👤 Trainer Calendars
        👤 Manager Calendars
      ≋ Training Manager Portal Users
   ▷ ≋ WFM
   ▷ ⚙ Configuration

Click Training to
create a new request.

Sub Menu

▲ ▦ Training Requests
        📅 4 Jul 2011 - 25 Sep 2011
   ▷ ⓘ Pending Approval
   ▷ ⓘ Active
   ▷ ⓘ Completed

Right-click
Training Requests.

⚙ Preferences ▾

When the `New Training Request` option is selected, the template will appear, as in the example below.

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

Start Tab

- `Main Title & Reference`–enter a title, and then enter the training code in the field to the right (this is mandatory).

- `Training code`–the code associated with the training. This could be a code associated to some e-learning content.

- `Training Category`–identifies the category of training and the exception code that will be inserted into the agent schedules in WFM. The categories are available from a drop-down menu.

- `Description & Objectives`–should contain information relevant to the training and will show against the training in the training roadmap.

- **Business Sponsors** / **Stakeholders** / **Additional Notes**—enter any information here that is relevant to the training request. This information will also appear against the training in the training roadmap.

- **Status**—three options are available from the drop-down menu:

    o **Pending Approval**—used in the first instance when a training request is raised.

    o **Active**—used when the training request has been committed to Genesys WFM and is "good to go." For a training request to be visible in the web portal, the training request must be shown as **Active** and have **Displayed** selected on the **Training Roadmap**.

    o **Completed**—used to store any completed training request.
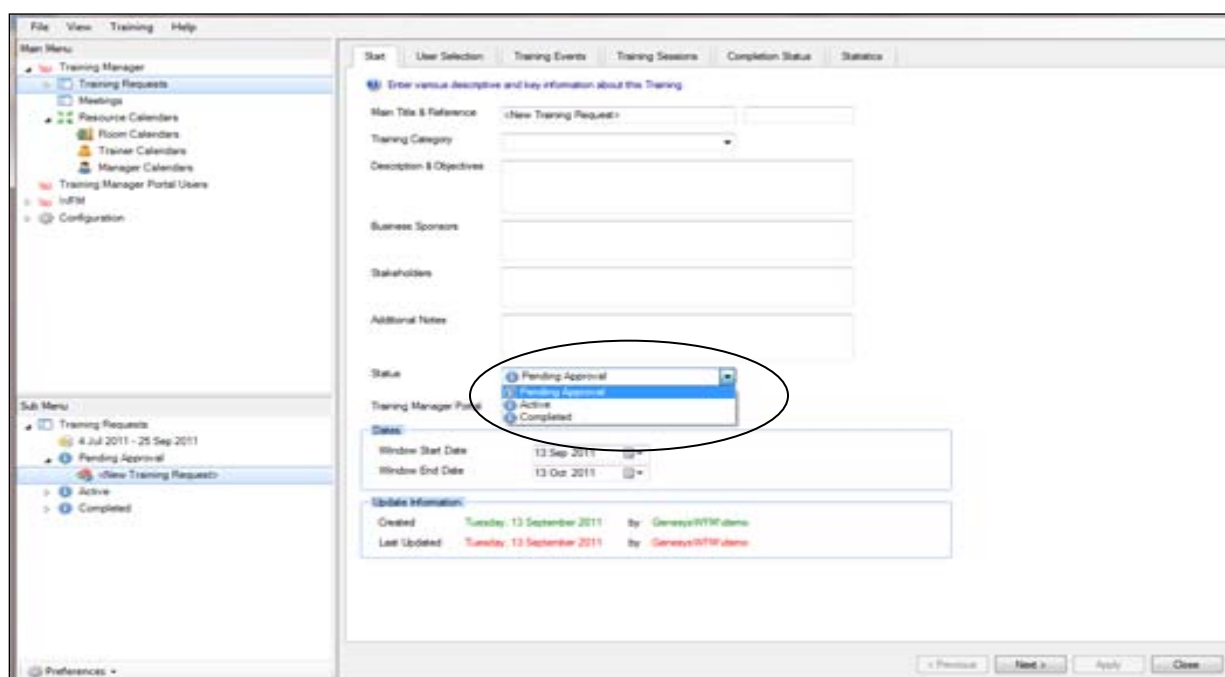
By default the training window dates will display one month from today's date. This can be manually changed so that training will be scheduled within a different date range.

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

Amend the date range as required.

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

Site Selection

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

In the example below, there are two sites or Scheduling Pots to select users from. Full teams or individual users can be selected by expending the team and selecting individual agents. A user count will be visible at the bottom of the screen. There is also the option to change the display mode from `WFM Hierarchical` to `WFM Alphabetical`.
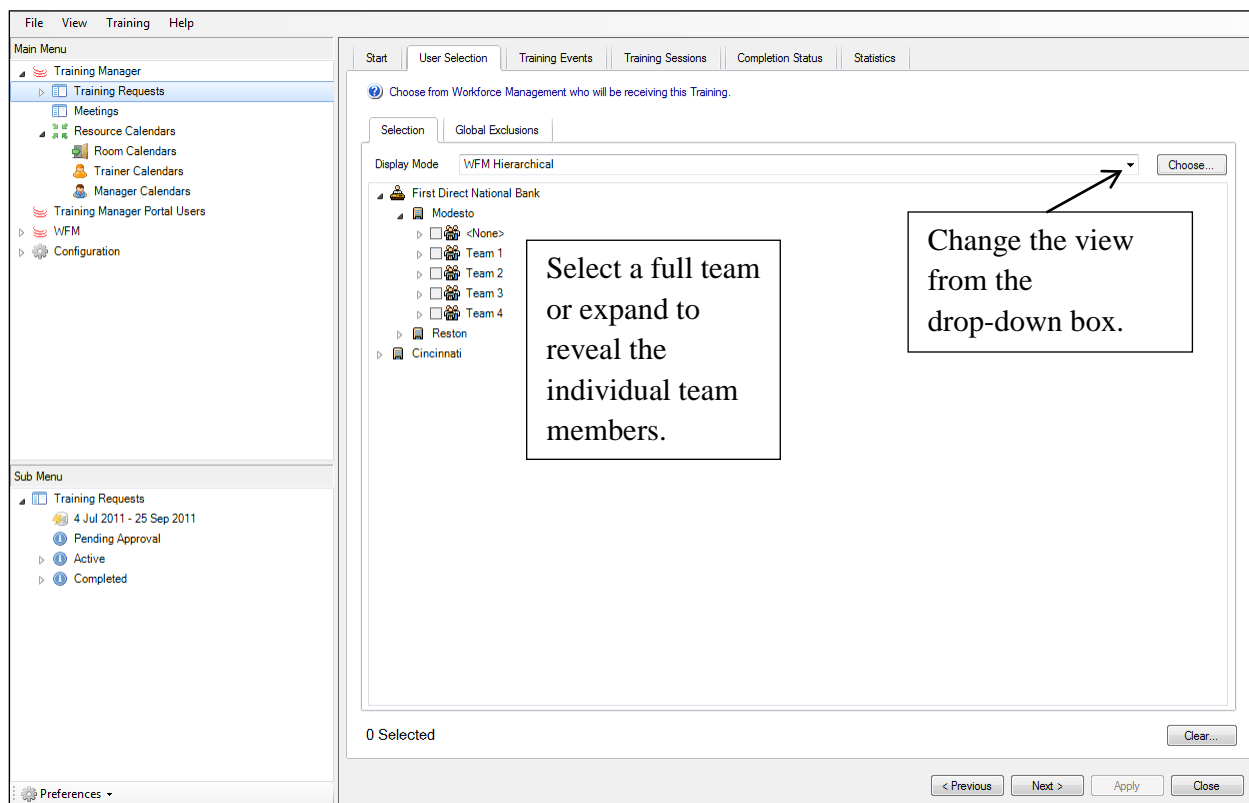
Activity

The option to select agents by activity is available by clicking the `Choose` button. The `User Selection Filter` screen appears, as in the example at the bottom of the page.

Click on `Choose` to access additional selection options.

Different selection options are then available.
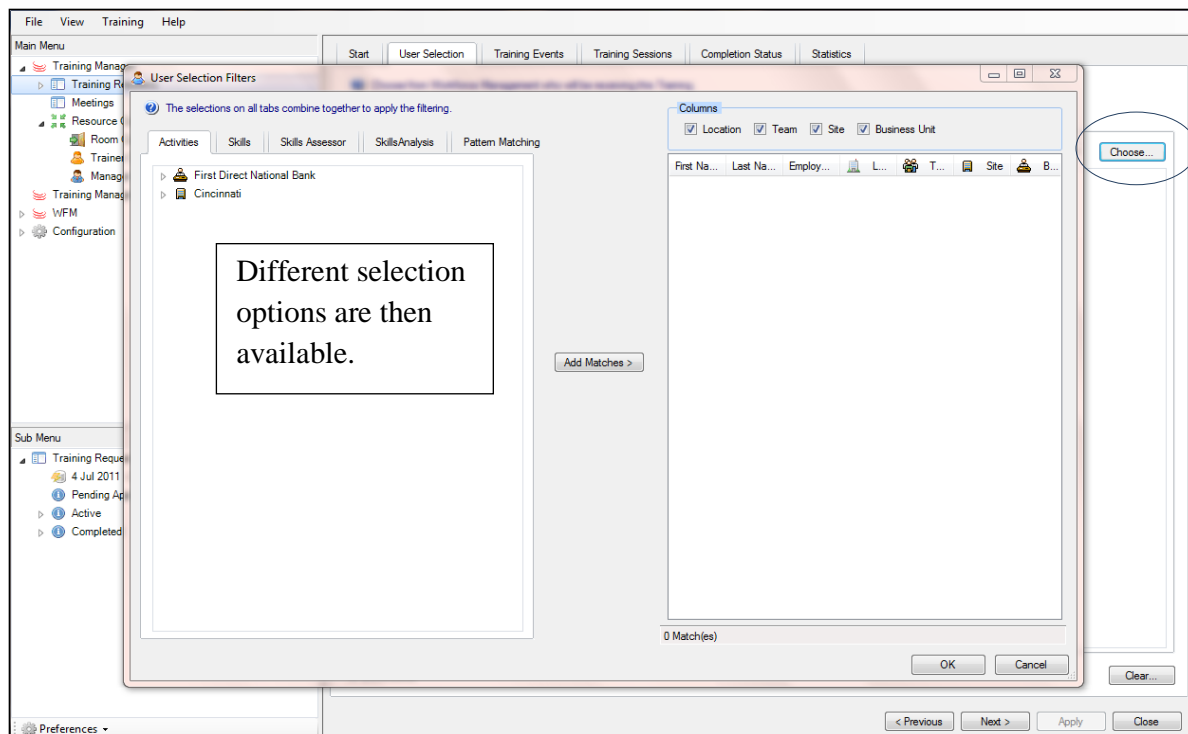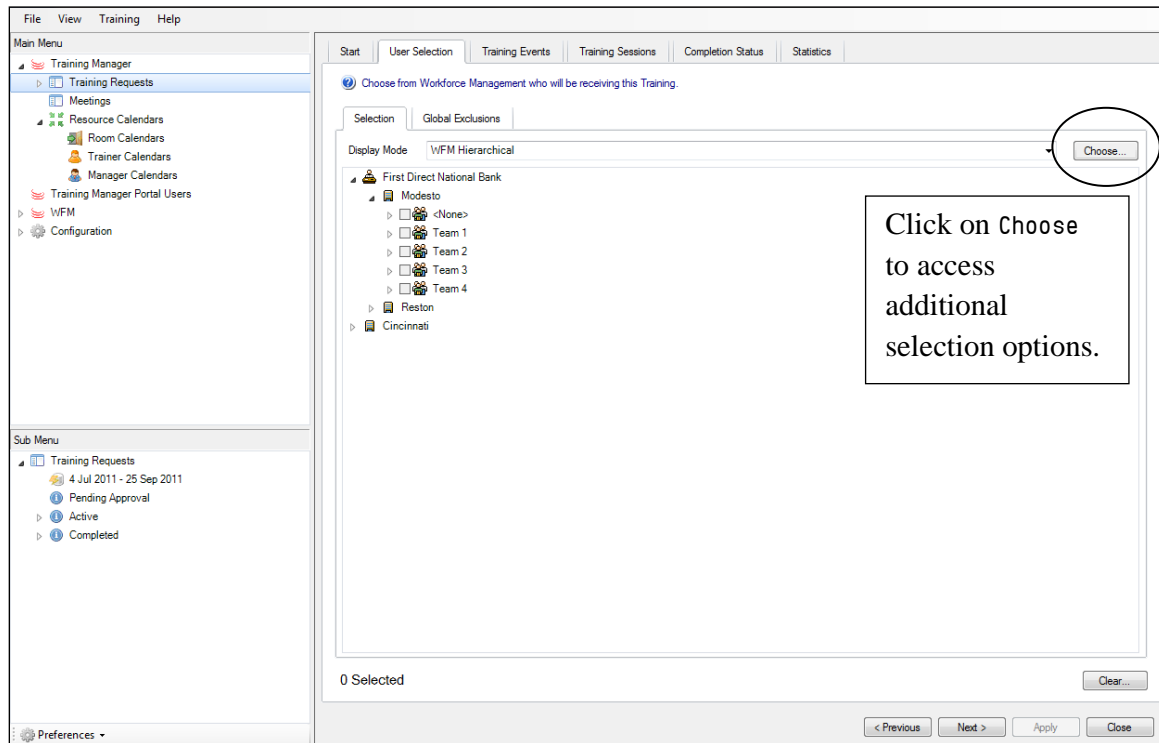
`Activities` are the activity sets in Genesys.

In the example below there are three activity sets under Modesto: `Customer Care`, `Email`, and `New Accounts`. If training is to be delivered to agents who have a specific activity in their Genesys WFM profile, this filter will allow dynamic selection of those agents.

When you select an activity and then click the `Add Matches` button, the agent names are displayed in the pane to the right, together with an agent count at the bottom of the screen.

There are options to view the selected users by `Location`, `Team`, `Site`, and /or `Business Unit`.
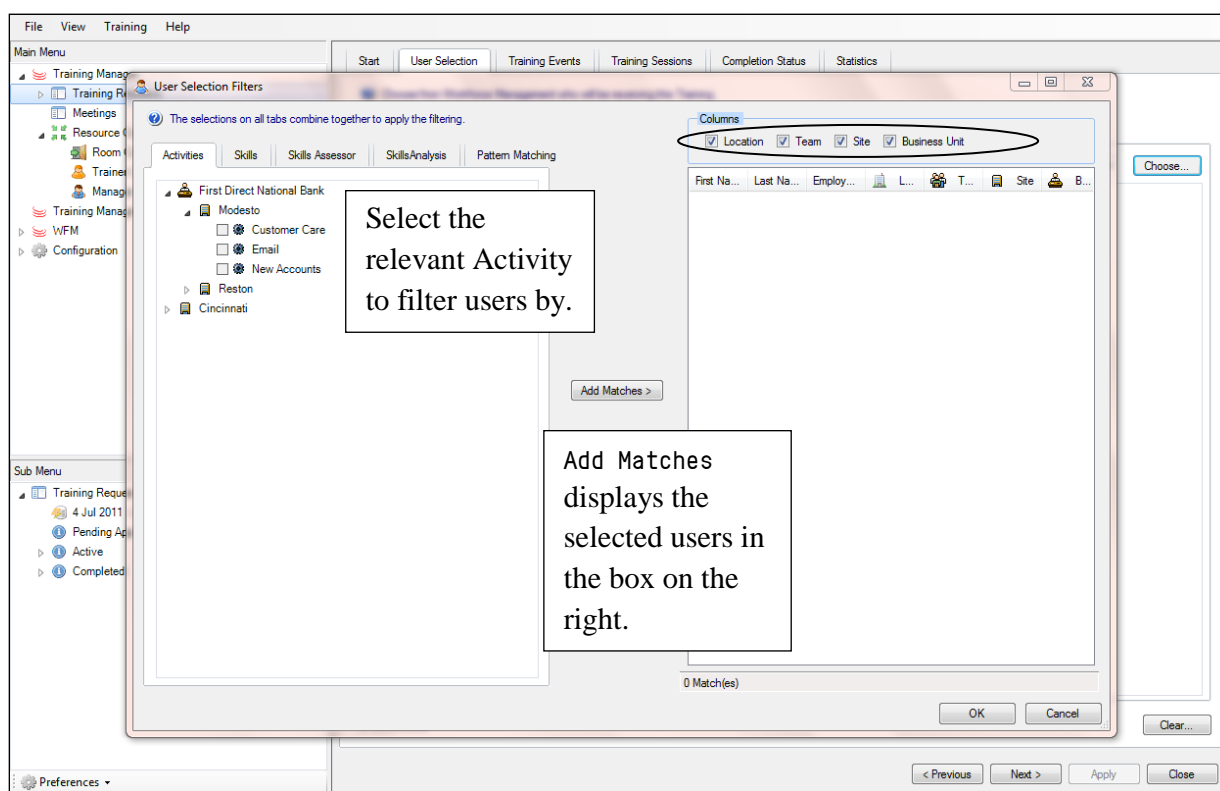
Below is an example showing users in the right-hand pane who have the `Customer Care` activity in their profile.
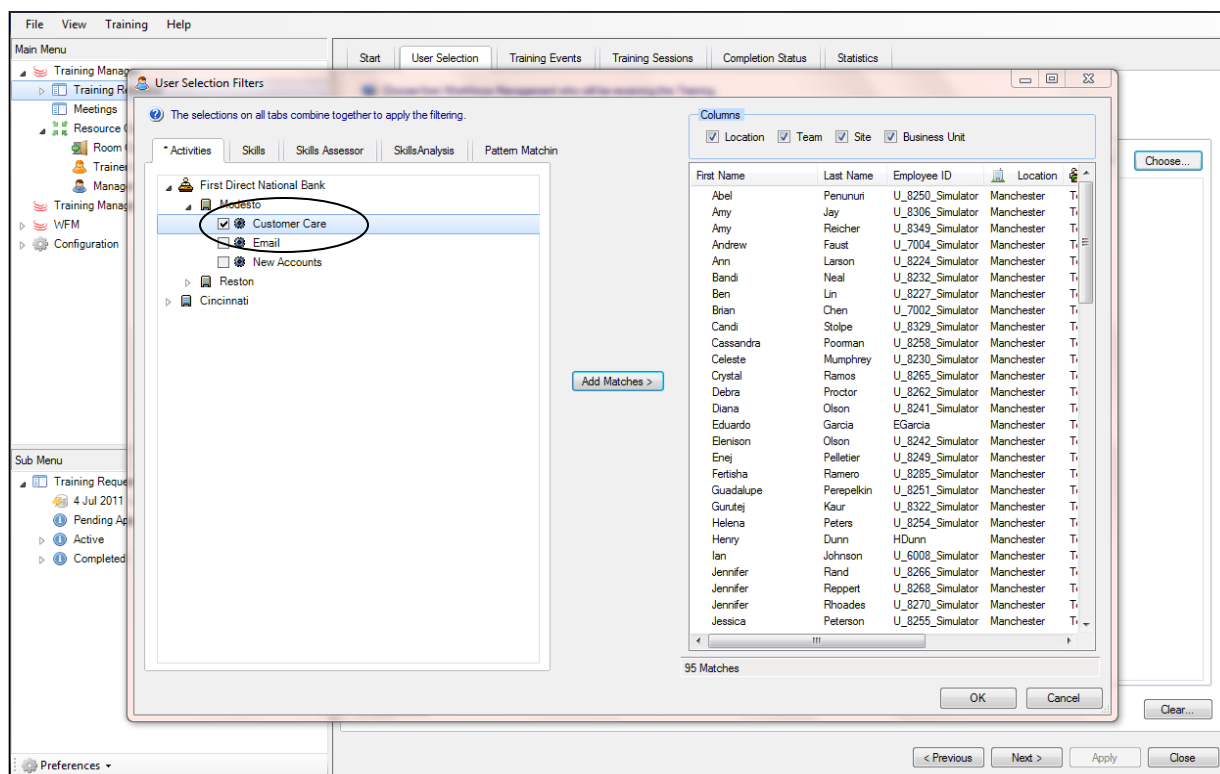
Additional activities can be included within the `User Selection` list by selecting an additional activity from the drop-down menu, removing the original selection first, and then clicking `Add Matches`. The `User Selection` window appears, with three options:

- `Add to existing`–add any agents that are not already in the user selection list.
- `Replace existing`–only show agents with the second activity in the user selection list.
- `Cancel`–cancel the selection and clear the user selection.

This can be done as a combination across all of the user selection filter tabs.
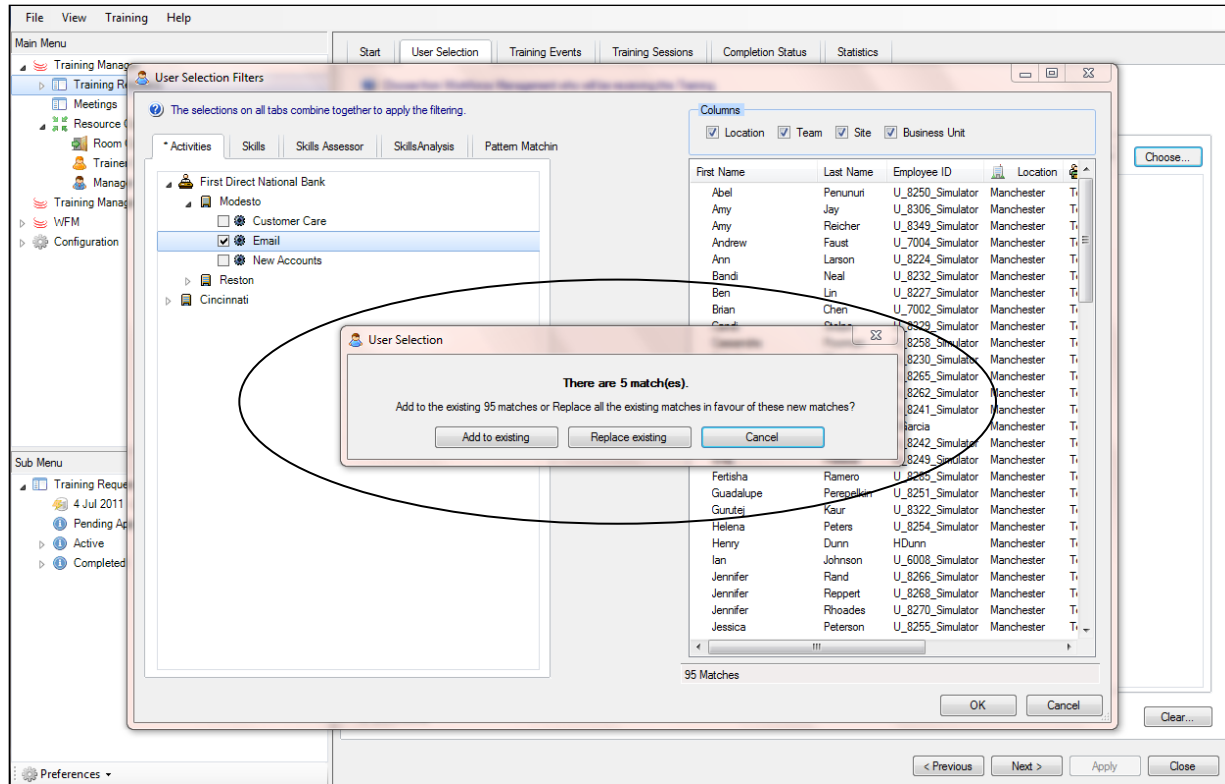
Once OK is selected the users are displayed in the user selection tree. See the example below.

Users are selected automatically from the previous filter screen.
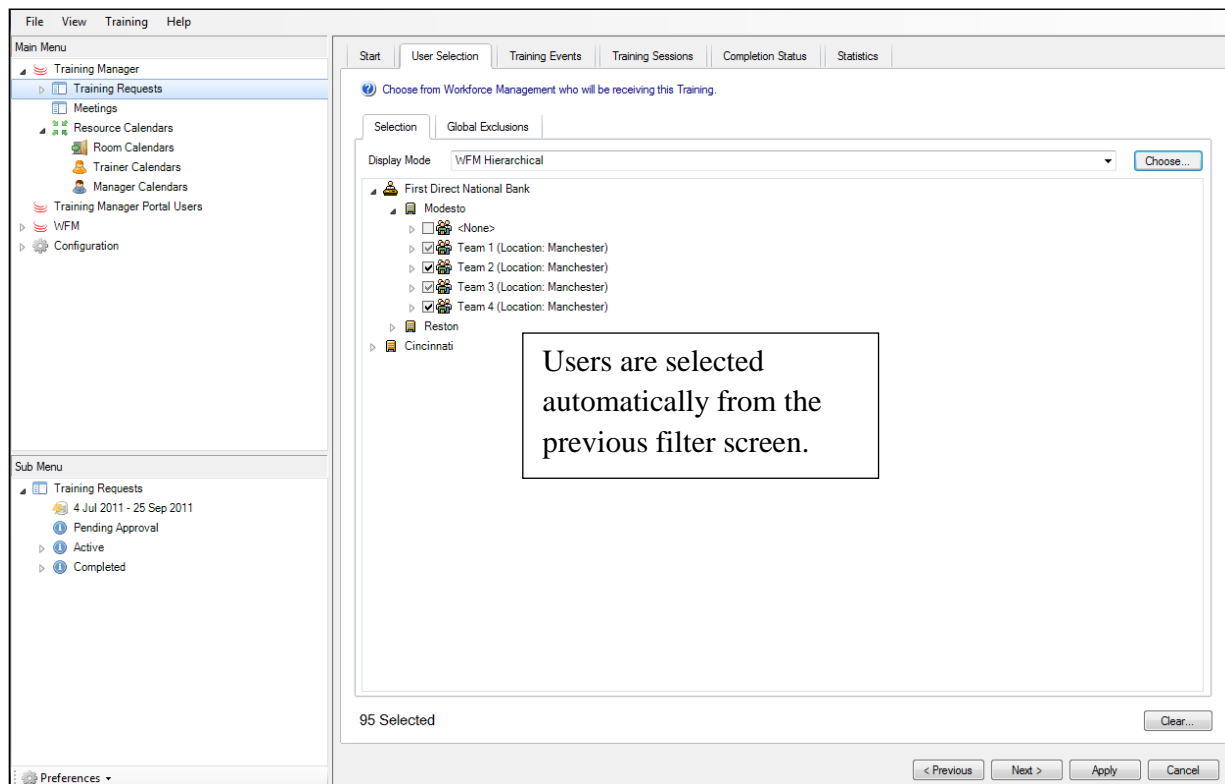
There is also the option to remove or add any user to the `Global Exclusions` list.
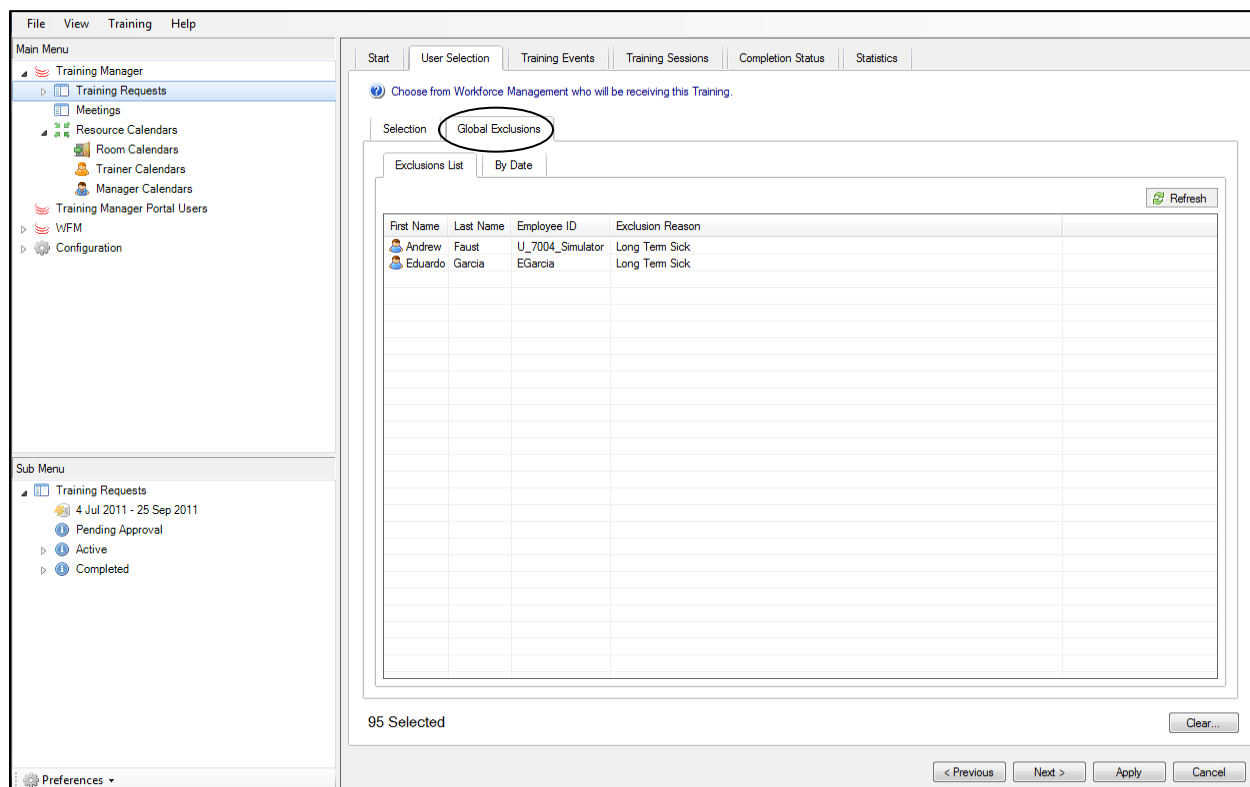
Skill and /or Proficiency Level

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

Skills identify the call types; users can be selected by their skill and/or by their level of proficiency.

Select the `Skills` tab; a drop-down menu will appear with all of the skills in Genesys listed.

Highlight the relevant skill and select `Add` (multiple skills can be selected).
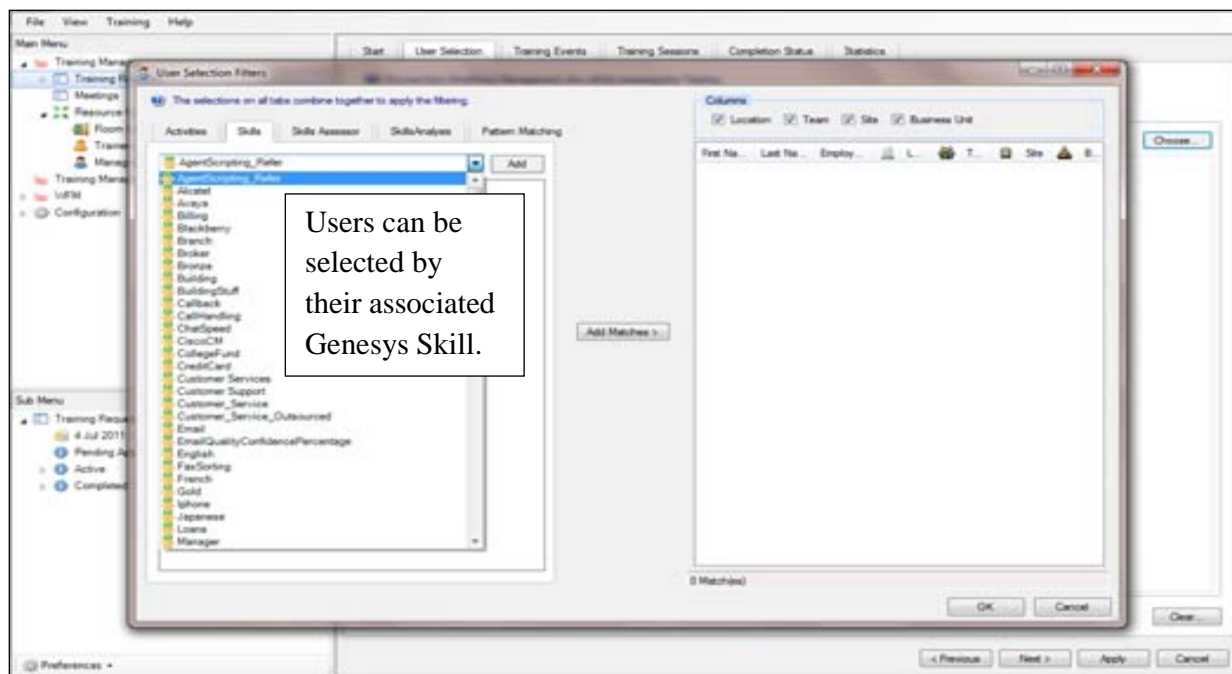
Once the skill has been selected, additional filtering is available.

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

In the box on the right-hand side, enter the proficiency level; for example, < =5 for billing skills less than proficiency level 5.
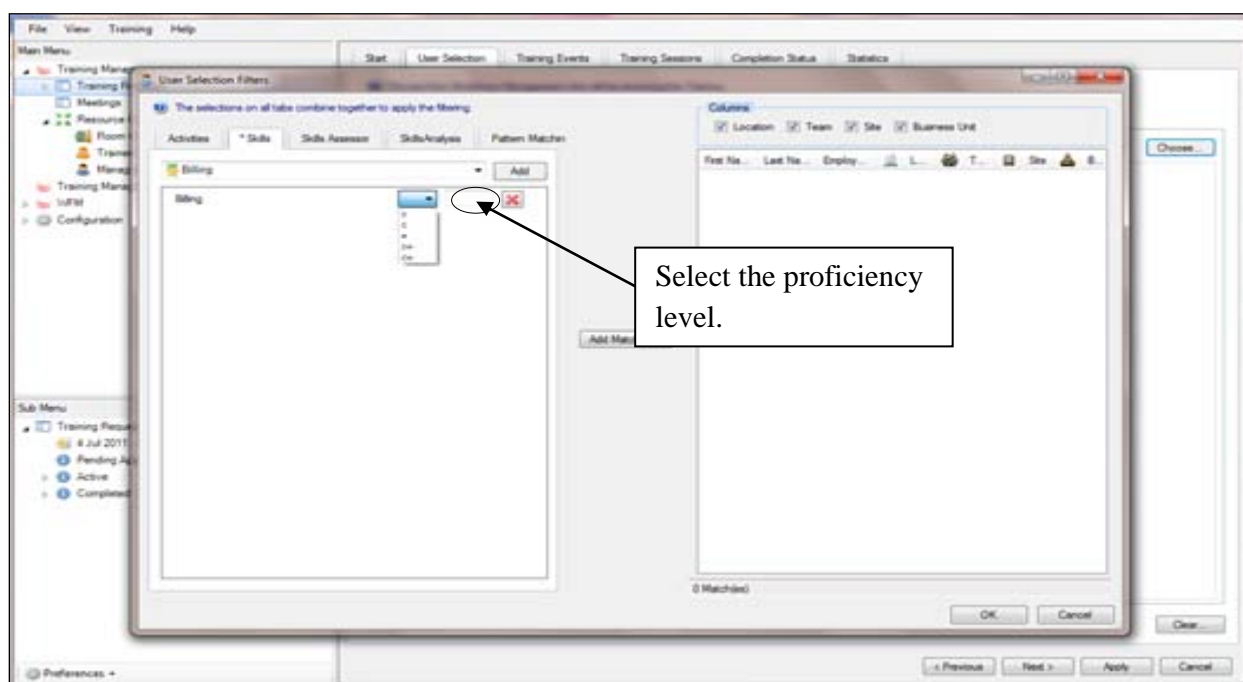
Then select `Update Matches` to identify the number of agents selected.

The individual agents are listed in the pane on the right. Click `OK` to return to the `User Selection` tab, where the users are confirmed as selected.
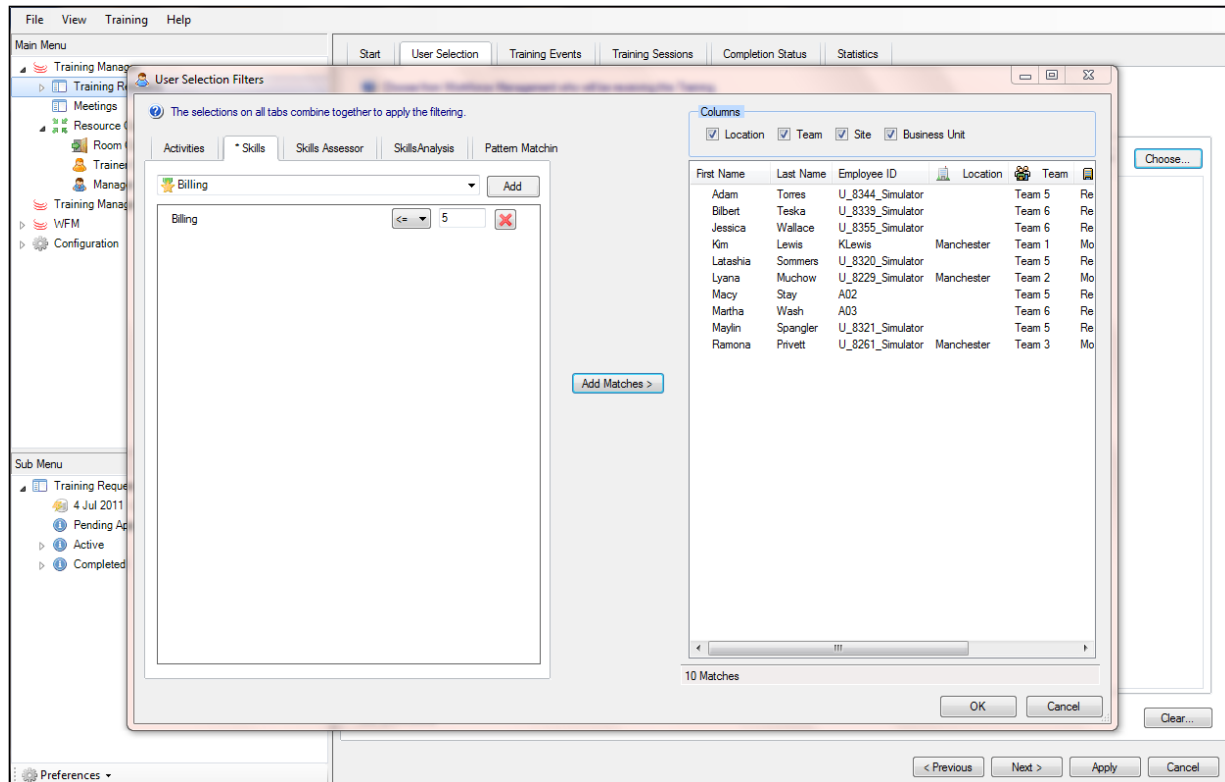
Skills Assessor

Only if Skills Assessor is mapped across to Training Manager will the Skills Assessor option be available. This allows for the selection of users based on their assessment results at assessment or content level.

A list of assessments will be available for selection based on the date range.

The assessments can be expanded to view the associated modules to select from. In the example below, the `Hardware` module has been selected, and any agents who achieved results between 0% and 90% have been requested. Five users have been identified and are visible in the pane on the right. This allows training activity to be based on assessment results; therefore, only training based on knowledge or skill gaps will be scheduled.
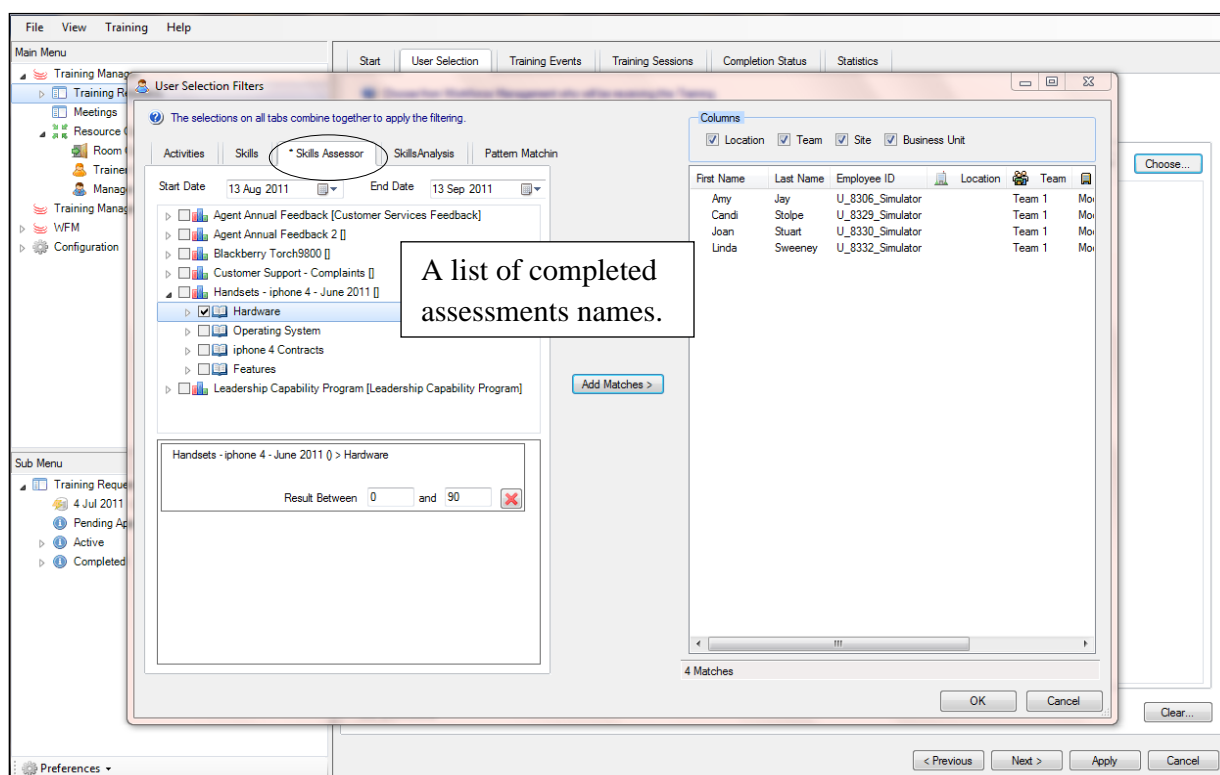
SkillsAnalysis

The option to select users based on the analytics area of Skills Assessor is also available (providing that Skills Assessor is integrated into Training Manager).

A list of the training sessions created in `SkillsAnalysis` will be visible and available for selection as per the example below.
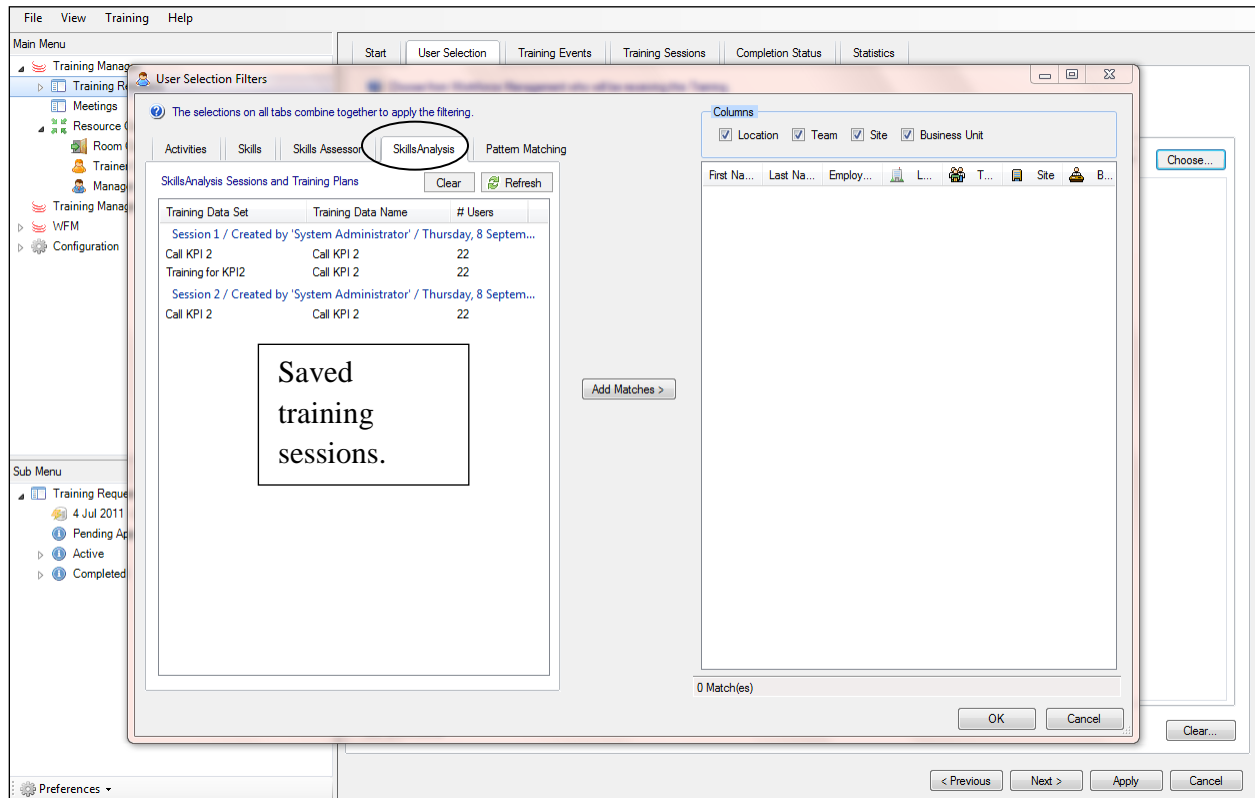
Pattern Matching

This allows for keyword searching as in the example below.

Once agents have been identified and selected, update the agent count by clicking `Update Matches`.

The individual agents will then be visible in the `User Selection` window.
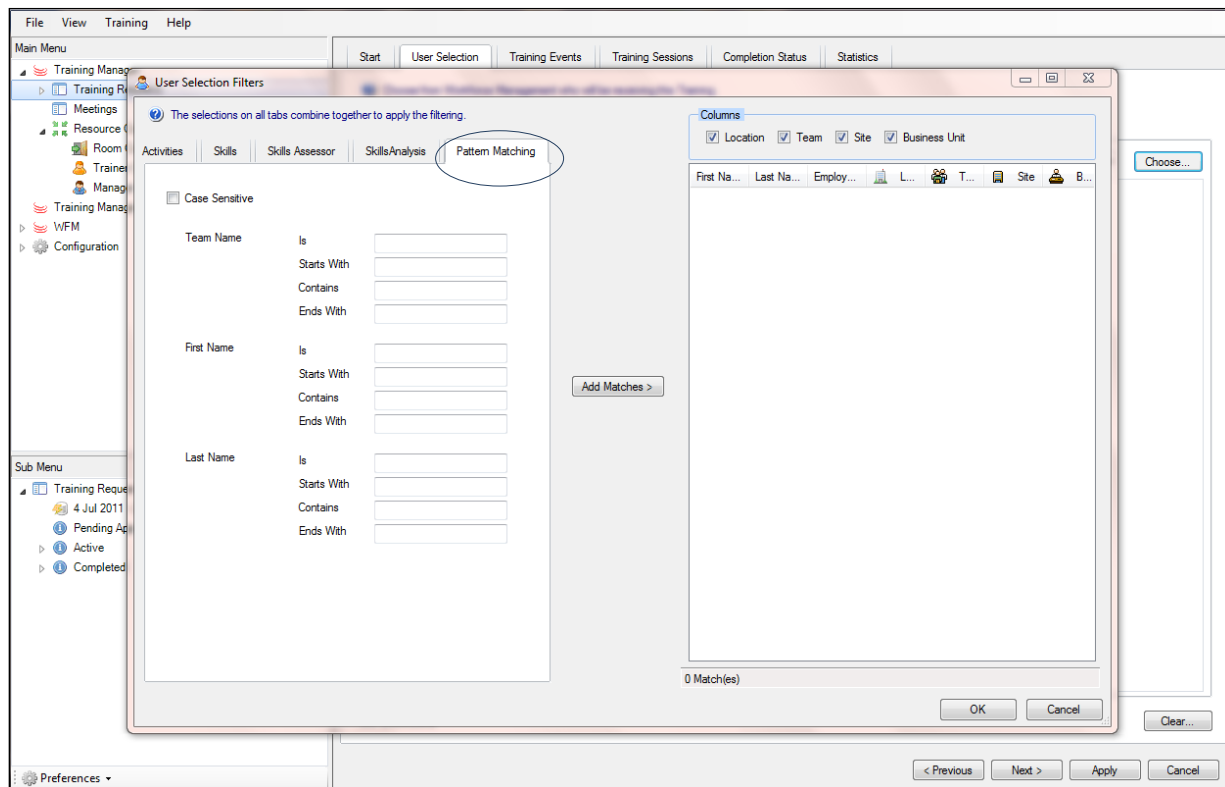
Click `OK`, and then click `Apply` and move on to the next tab.

Training Events

This is where an event is created for the training request. For example:

Once the training event template appears, select the icon for the option to create a new event. The training request name will automatically appear.
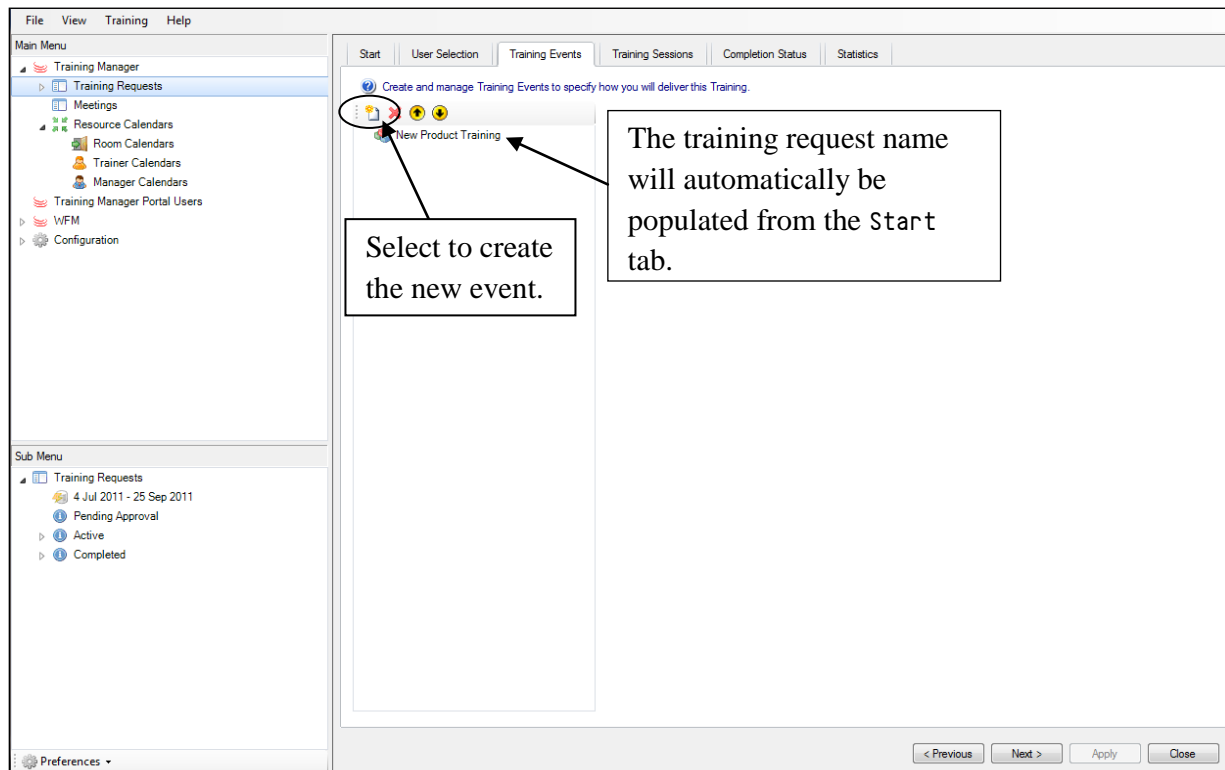
Creating a New Event

Once the new event icon has been selected the template will appear as per the example below. It can be renamed and a description can be included in the `Event Details` area.
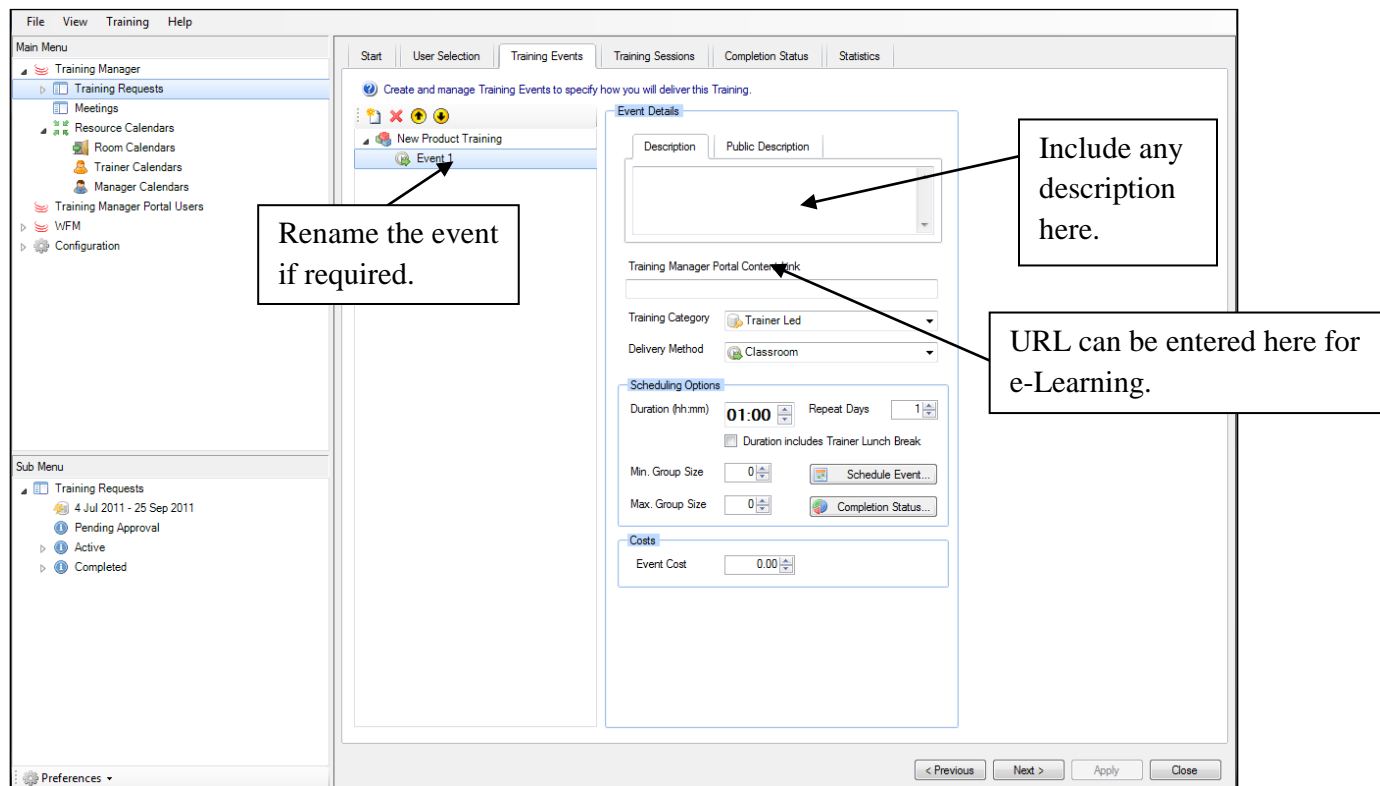
- `Description`–information entered here is only visible in Genesys Training Manager.

- `Public Description`–information entered here will be visible in the web portal and can be used to communicate any pre attendance requirements to the delegates.

- `Training Manager Portal Content Link`–a URL can be entered here that will allow a user direct access into the web page through their web portal view (this will depend on any internal firewall constraints).

`Training Category`–this is selected from a drop-down menu (the associated exception code and color will be published in Genesys WFM).

- Delivery Method–this is selected from the drop-down menu; there are two methods available:
  - Classroom–the agents will be scheduled in groups.
  - e-Learning–the agents will be scheduled individually.

To access the scheduler either right-click on Event 1 or click on Schedule Event.

Enter the course duration. Repeat Days is selected if the training is for more than 1 consecutive day.

Selecting this will exclude the trainer lunch requirements as the trainer will manage lunch as part of their training session. If this is not selected then the application will try and schedule training around the trainers lunch break requirement, which will be impossible if the training is all day.

Select Completion Status to view the agents who were selected in the user selection.

Once all of the details are entered, select Schedule Event or right-click the event name to open the Scheduler.

The Scheduler contains the Event Details information, brought over from `Scheduling Options` in the `Training Events` tab. The training request name and training window are carried over from the training request `Start` tab.

If any information is changed in the template, the information must be saved before continuing.

If any information is changed in the event, click on `Save Event` to save.
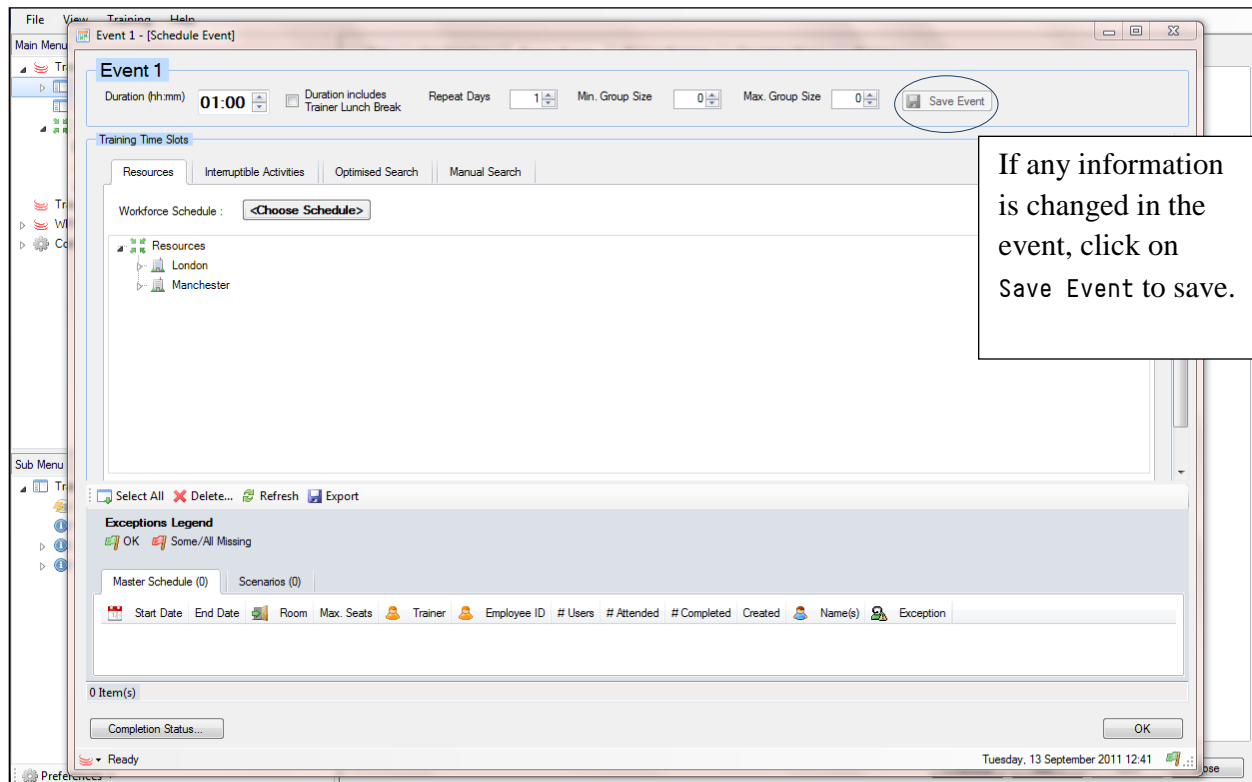
Schedule Event

There are five tabs in the Schedule Event section:

- Resources

- Interruptible Activities

- Scheduling Options

- Optimized Search

- Manual Search
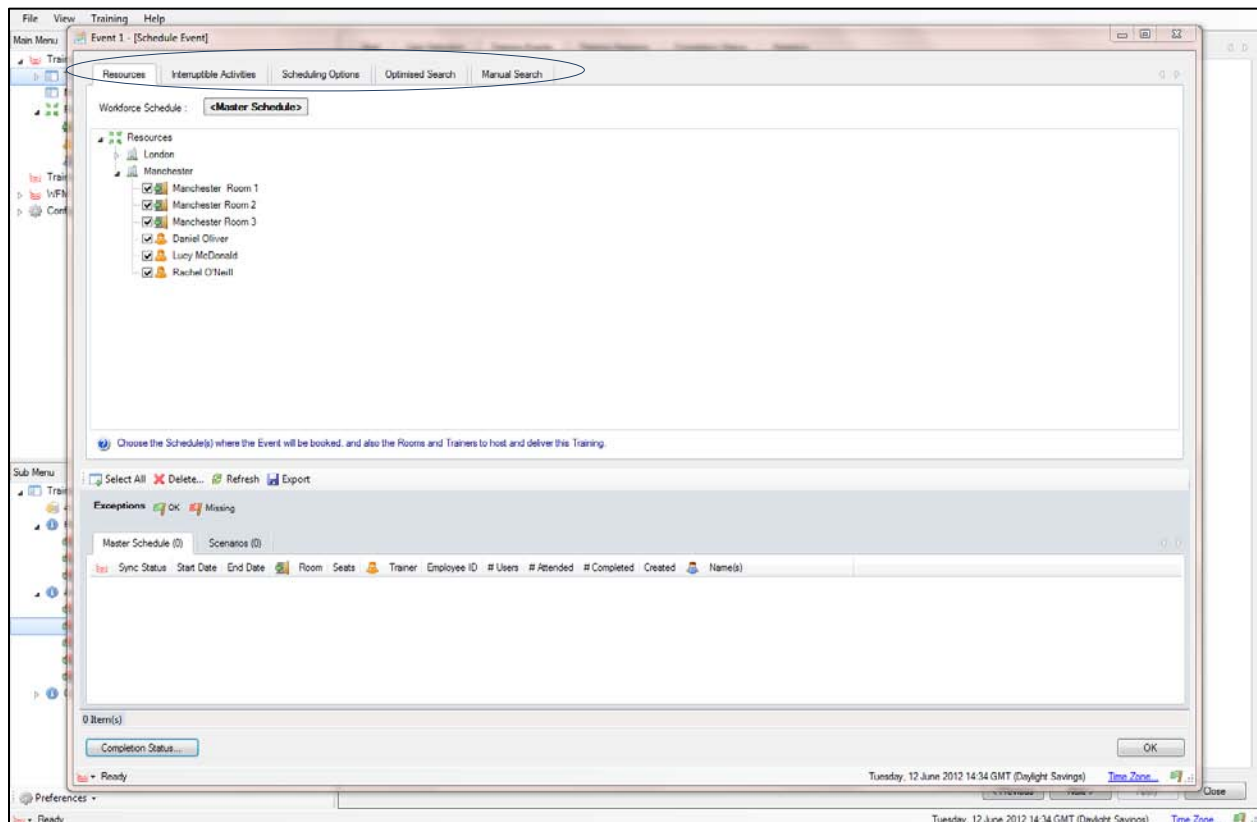
Resources

This is where the rooms and /or trainers are selected as part of the training request.

Expand the location(s) for the training, and any associated rooms and trainers are then visible for selecting.

Select the room(s) and trainer(s) by clicking the box to the left.

If no room(s) and / or trainer(s) are required, nothing should be selected.

If there is only a requirement for reserving rooms, right-click the location name and select `Reserve` `Places`.
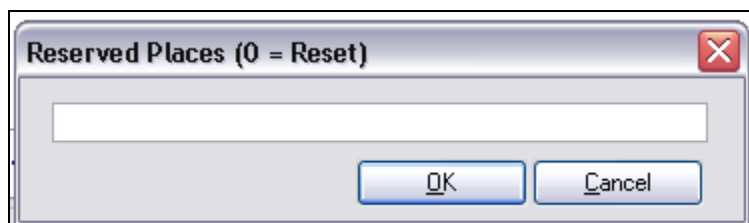
Enter the number of places and click `OK`. This will show against the location name.
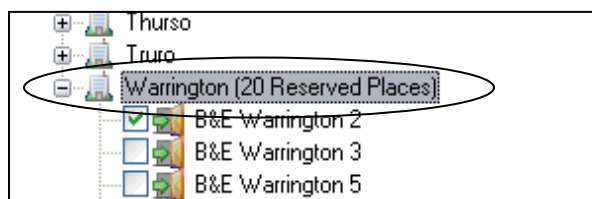
Select the preferred rooms by checking the box to the left of the room name. Genesys Training Manager will reserve room(s) up to the number of places requested as part of the scheduling process. Remember to select the rooms to be reserved and the trainers, if required.

To remove `Reserved Places`, enter `0` to reset.
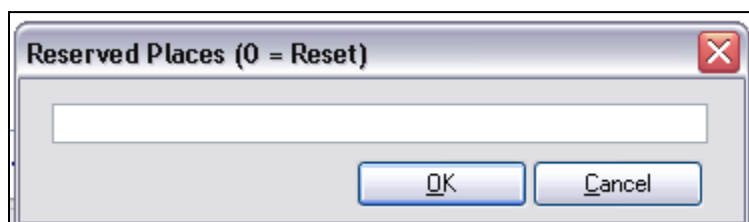
There is also the option to select the required schedule in WFM to use to schedule the training sessions. Click < `Choose Schedule` > and a pop-up window appears, prompting you to select either the Master Schedule or a Scenario from WFM. Multiple Scenarios can be selected if required.

Workforce Schedule is where the Genesys WFM schedule is selected in which to schedule the training activity.

There are two options:

- ▪ `Use the Master Schedule` (this is the "live" schedule)

- ▪ `Use a Scenario or Multiple Scenarios` (this is where "What If" schedules can be played with without impacting the live schedules)

If `Use the Master Schedule` is selected, any training activity is scheduled directly into the agent's live schedules.
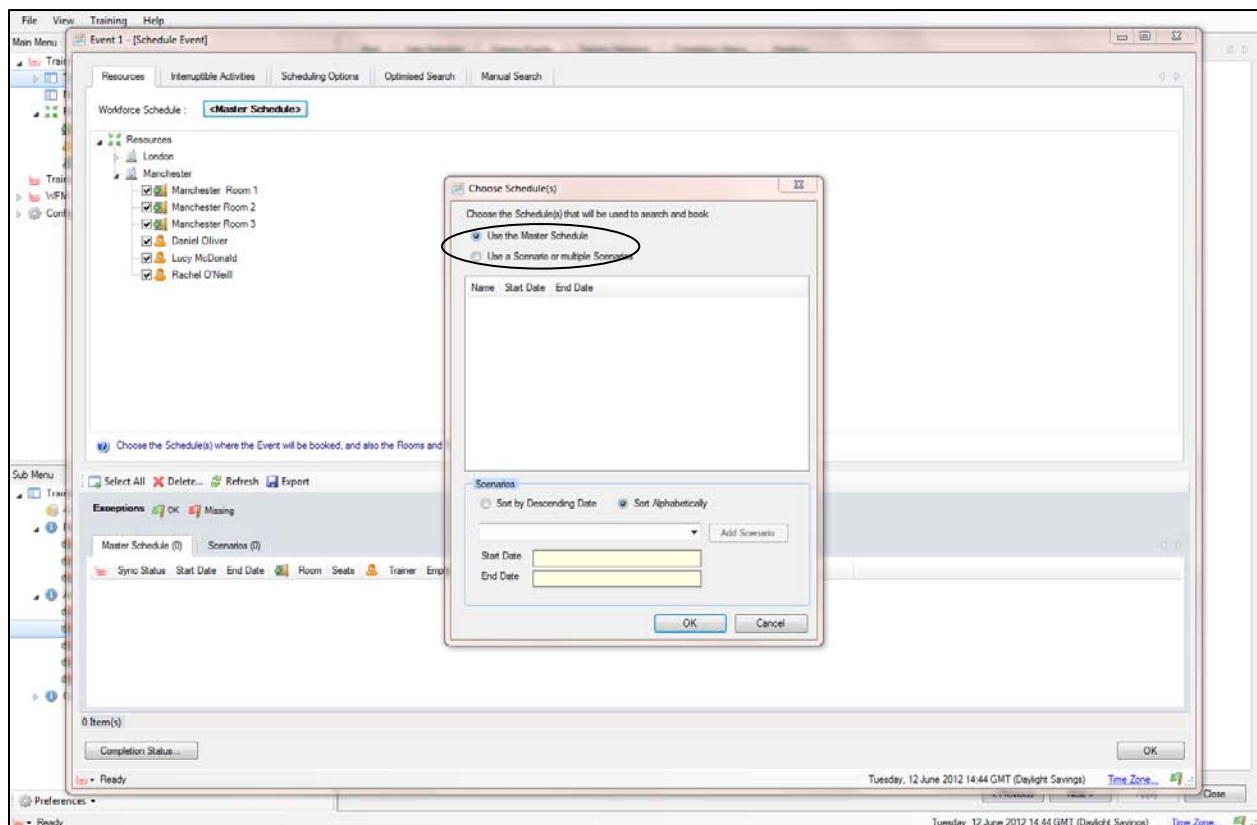
If `Use a Scenario or Multiple Scenarios` is selected, the option to select the relevant scenario from a drop-down menu appears.

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

Scenarios can be sorted by descending date or alphabetically.
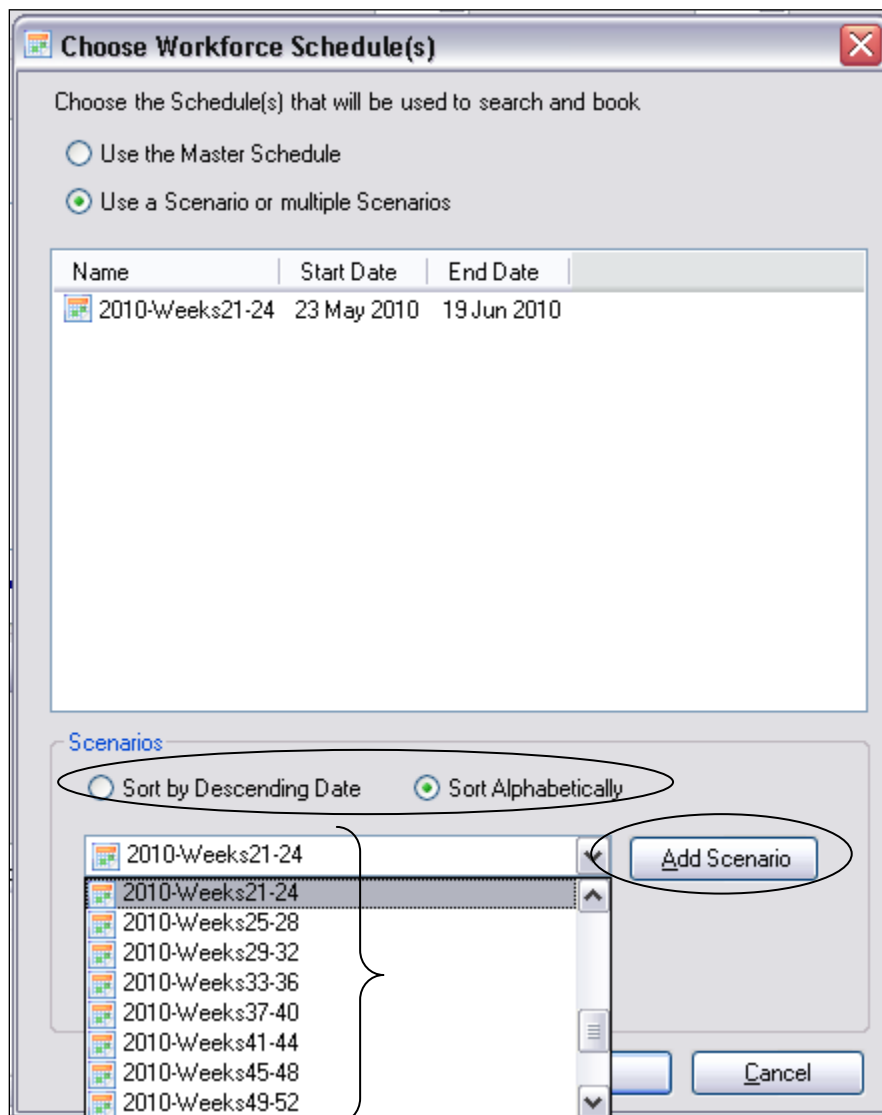
Genesys Training Manager will only schedule training activity into the Schedule or Scenario(s) selected.

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

Genesys Training Manager can create any combination of room, trainer and agent. The following pages will demonstrate some of the different training scenarios options available.

Scheduling a Combination of Trainer, Room, and Agent

Where a trainer and room are required as part of the agent scheduling process, first identify the locations that are affected and then expand to view the rooms and trainers that are associated with them.
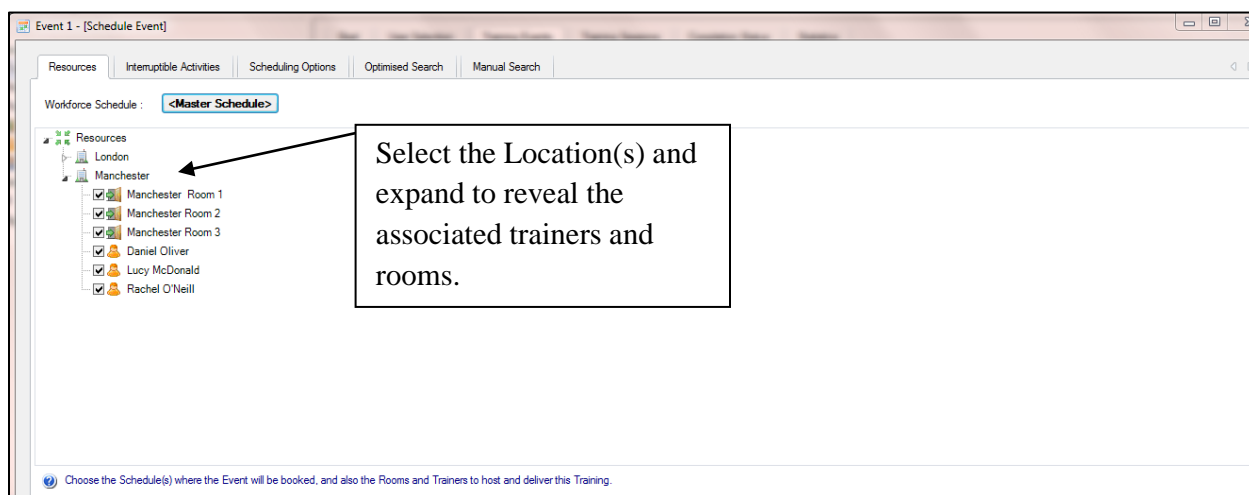
The room(s) and trainer(s) required are selected by checking the box to the left.

Once the room(s) and trainer(s) have been selected, click the `Interruptible Activities` tab to confirm/select what activities are interruptible.

Interruptible Activities

Activities will automatically be selected as interruptible in Training Manager. Activity Sets, Meals and Breaks are manually selected.

If a new Activity has been created then it will not be retrospectively selected as interruptible. If this needs to be included in the training request it will have to be manually selected.
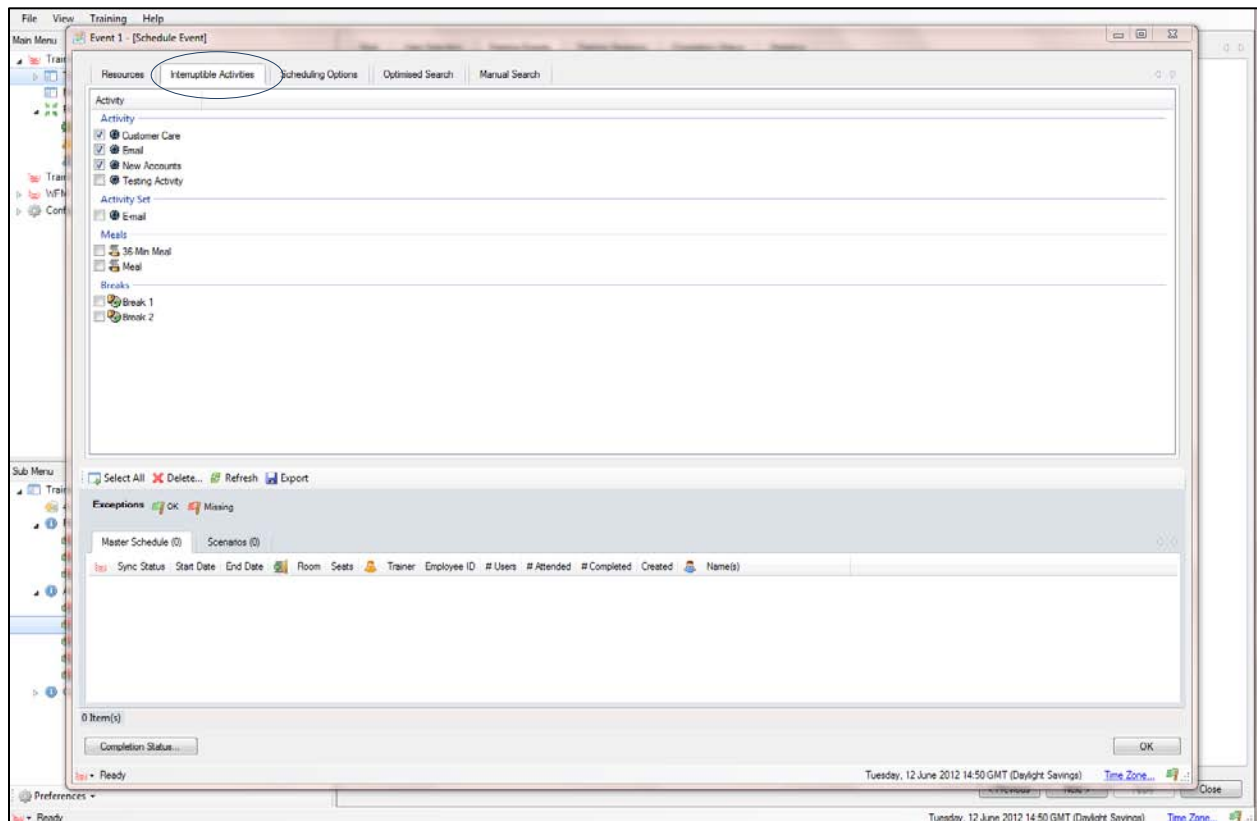
Scheduling a Combination of Room and Trainer Only

To create a training schedule for room(s) and trainer(s) only, for example, where there is a new intake of agents who have not commenced employment and are therefore not scheduled in WFM, Genesys Training Manager still must be configured with all of the relevant information. This excludes the User Selection up to the Scheduler stage, as in the example below.

To reserve the correct number of rooms, right-click the required location. A Reserve Places option appears.
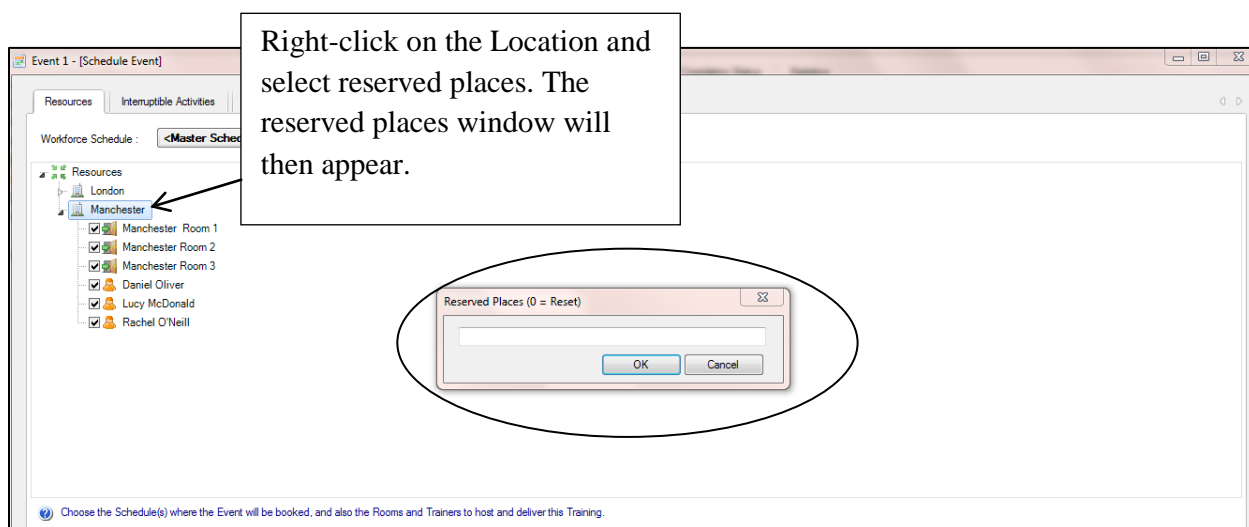
After selecting Reserve Places, enter the number of agents expected, for example, 20.
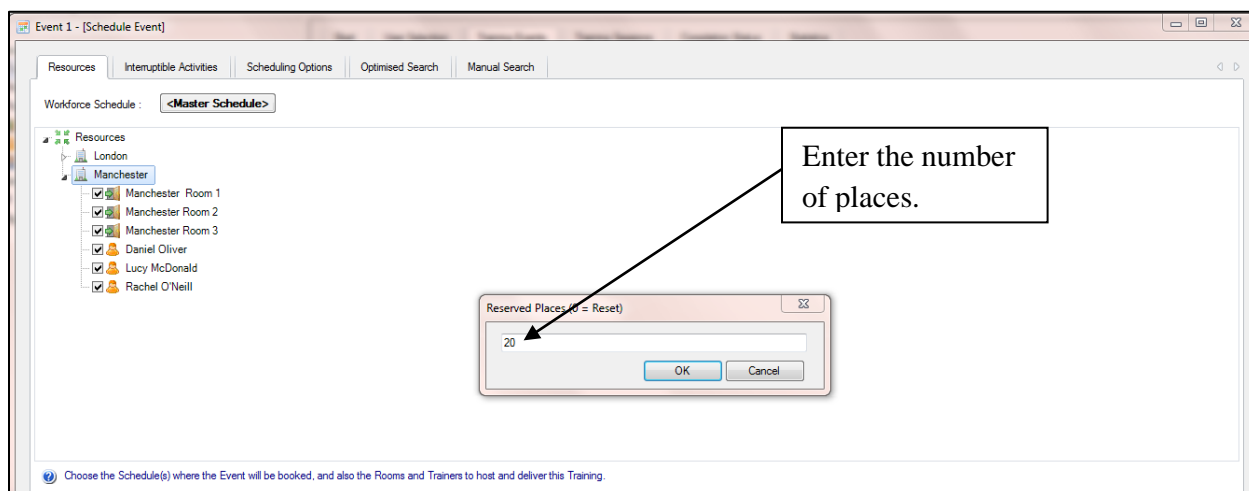
Select OK.

This identifies the number of places Genesys Training Manager needs to reserve for training.
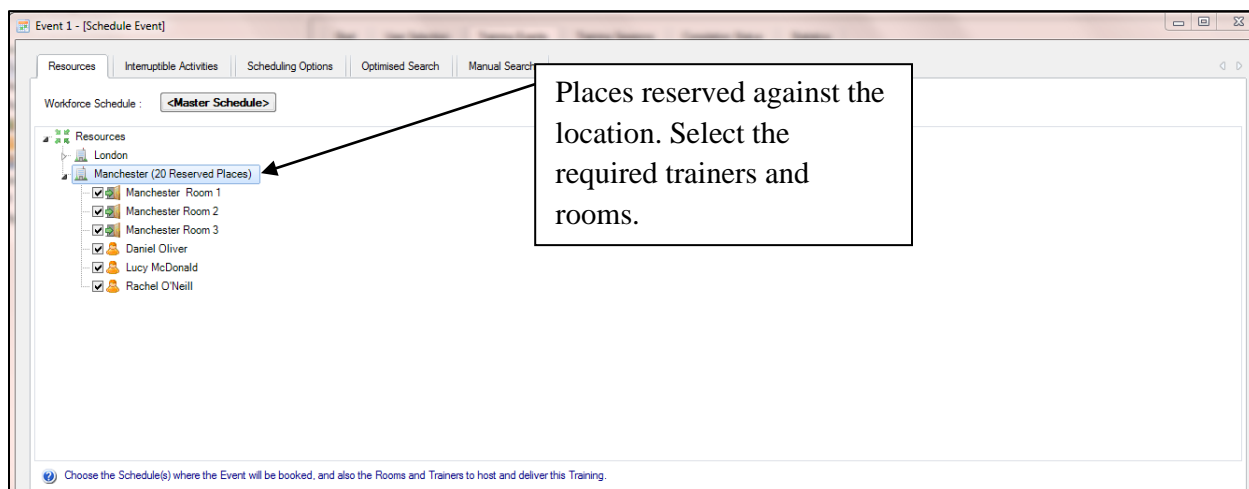
Once the resources have been identified, click the Interruptible Activities tab. Select any activities that can be interrupted by Training Manager. By default Activities are automatically selected, but Activity Sets, breaks, and lunches have to be manually selected. Click Optimized Search to move to the next tab.
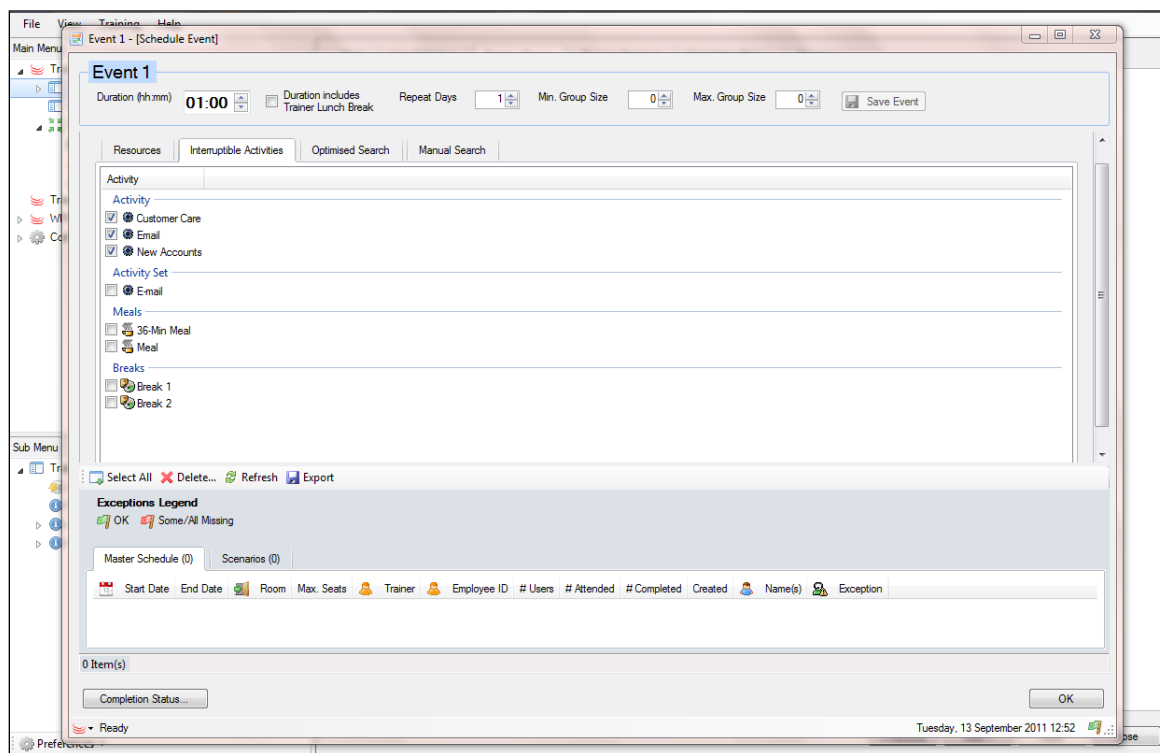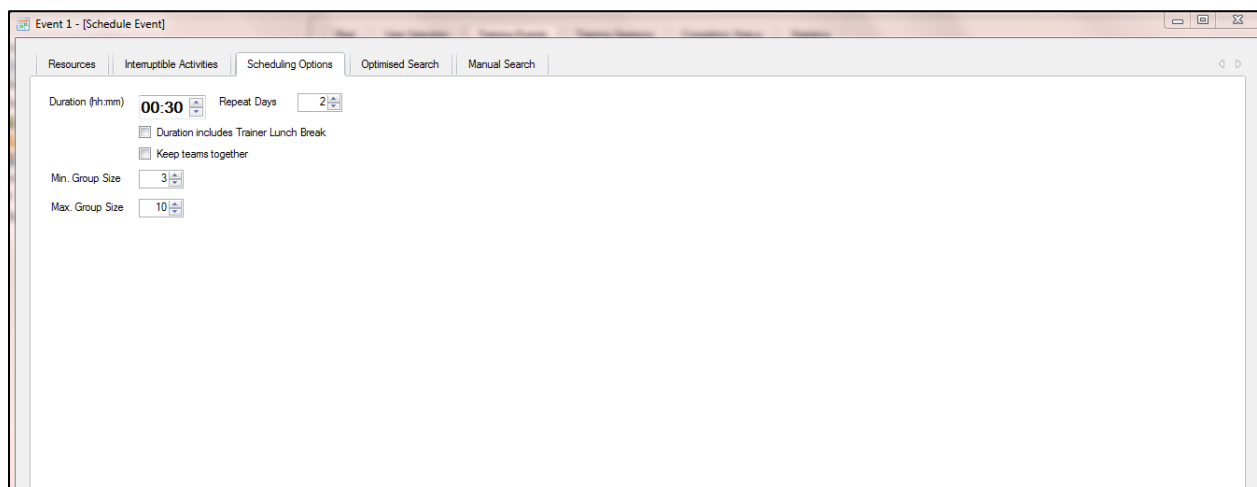
Agent Only Scheduling

To schedule agents only, create the training request using the template wizard as usual, selecting the required agents in the `User Selection` window. Ignore `Resources` and continue from the `Optimised Search` tab.

Scheduling Options

The scheduling options tab allows for any amendments to be made before scheduling the training activity.

Optimization Algorithm Window

The Optimization Search Template (see the example below) uses business constraints when scheduling training activity.

It is divided into six sections:

1. Event Details

2. Training Window

3. Time & Travel Constraints

4. Performance Constraints

5. Booking Strategy

6. Training Sessions
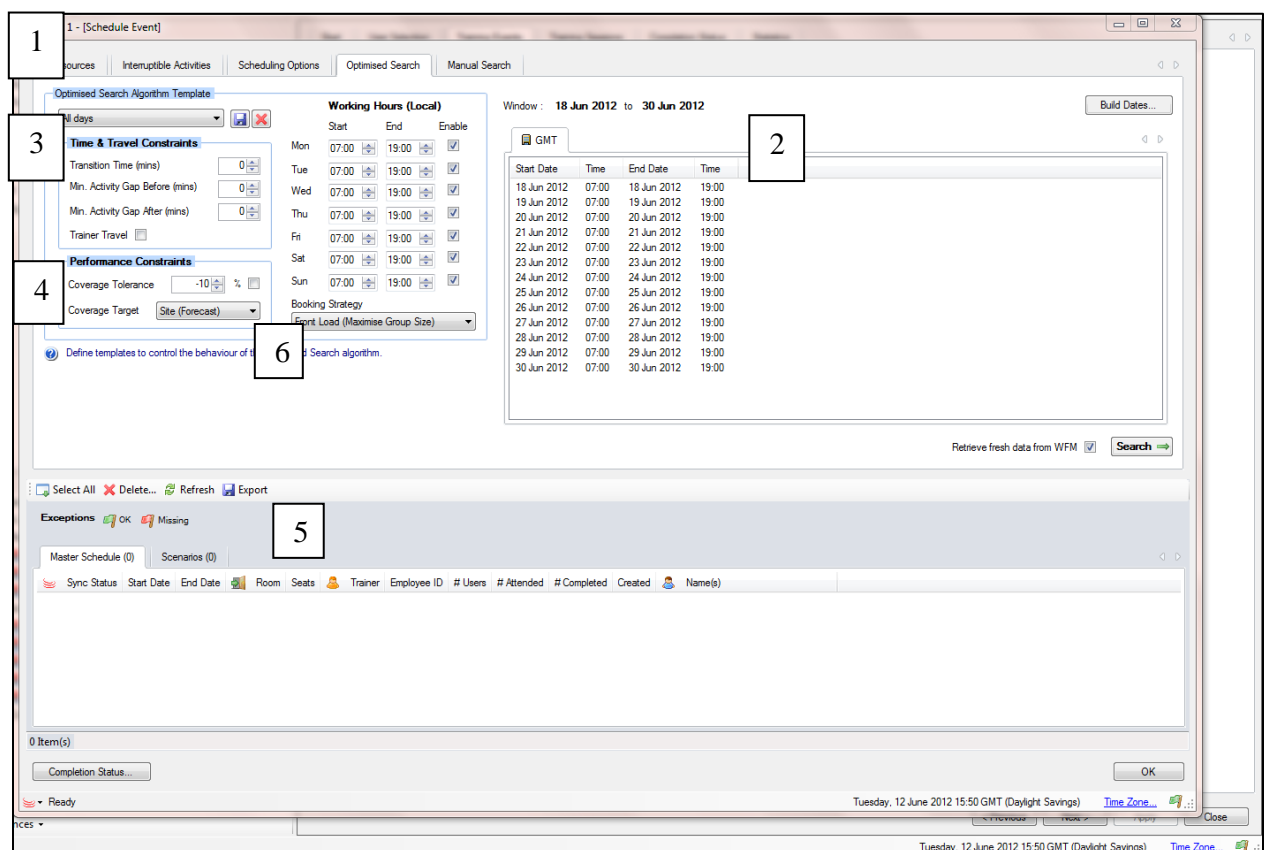
Event Details

This information is brought over from the information entered in the `Scheduling Options` window.

Training Window

The dates in the Training Window are brought over from the date range entered in the `Start` tab of the `Training Request`. The training times are built from the `Working Hours` start and end dates and from the enable days.

Different templates can be created by changing the `From` and `To` times, and selecting or deselecting any days between Monday to Sunday. Information can also be changed within `Time & Travel Constraints` and `Performance Constraints` and saved as a new template by clicking the `Save` button. Once the template is saved, the option to rename it appears, which then creates a new template. Once the template has been saved it will be available for selection in the drop-down menu.

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

Use the save button to create a new template. Any existing templates are available for selection from the drop-down list.

Selecting `Build Dates` will populate the training windows with the dates and start and end times.
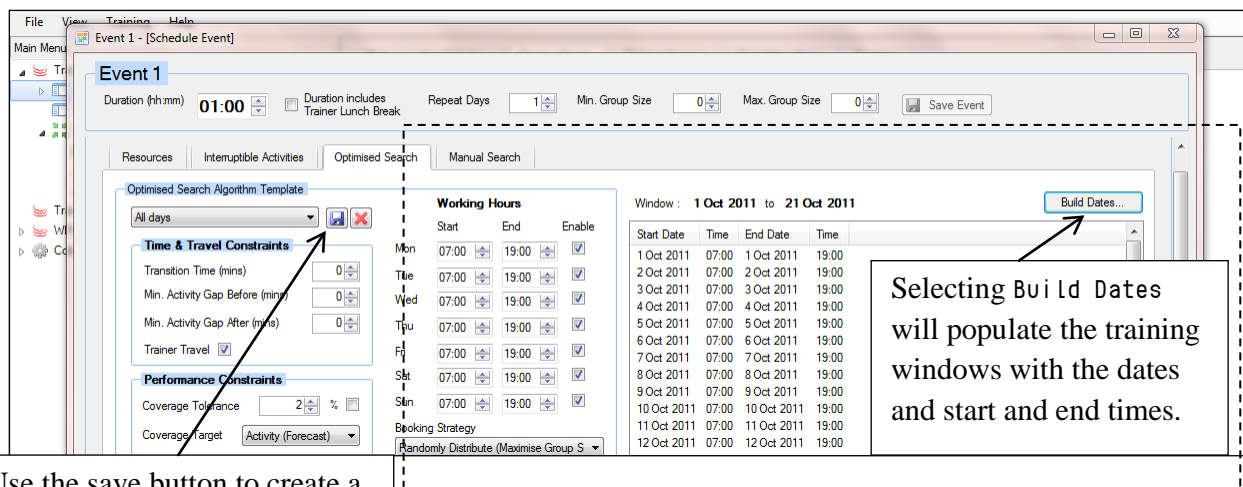
Excluding Training Dates

To exclude specific dates from scheduling training activity, right-click the specific date within the training window and select Remove.
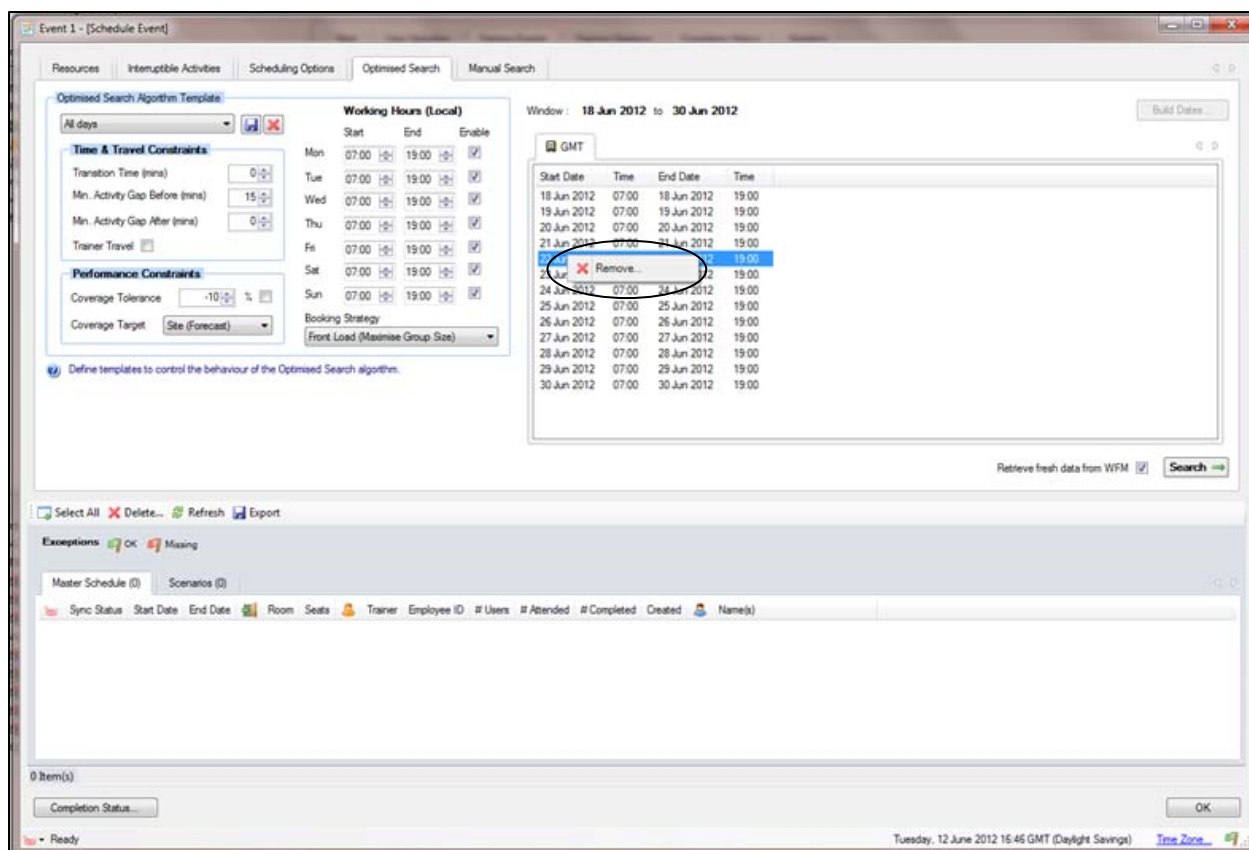
Time and Travel Constraints

This relates only to the room and trainer activity.

Transition Time (minutes)

This allows the application to build in a natural break for the trainer and the room between the training sessions.

In the example on the previous page, 15 minutes has been entered against transition time. Genesys Training Manager will build in a natural 15 minute gap between the previous training session and the next, for both the room and the trainer if this resource has been selected as part of the scheduling process. Training Manager will also look to see if it can scheduled the transition gap of 15 minutes at the start or end of the shift so as to minimise non-productive time.

Minimum Activity Gap Before

The `Minimum Activity Gap Before` specifies a minimum amount of time that an agent has to be on the phones before they can have a training session scheduled. This could be at the start of the day or after some other off-phone activity, for example, breaks.

Minimum Activity Gap After

This is similar to `Minimum Activity Gap Before` but specifies the minimum amount of time an agent has to be on the phones after a training session has finished. For example, it would not be ideal if the session finished 10 minutes before the end of the agent's shift, as the agent may not sign back on the phones, which would affect their adherence.

Trainer Travel

This option is selected when non-home trainers are selected to be used as part of the training resource. It is recommended that this is not selected in the first instance in order to prioritize home-location trainers first; you can then re-run the scheduler to use trainers that have to travel.

Performance Constraints

Coverage Tolerance

This is the difference between staffing required (calculated) and the actual coverage for the duration of the training session or how tolerant scheduling the training can be.

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

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

Coverage Target

There are four options to select from using either an absolute figure or a percentage (%).

- `Site – Forecast`: uses the overall Site Forecast figure.

- `Site – Required`: uses the overall Site Required figure.

- `Activity – Forecast`: uses the overall Forecast figure for the agent's selected activity.

- `Activity – Required`: uses the overall Required figure for the agent's selected activity.

An Intra-Day view in Genesys WFM.

Coverage - Actual Staffing (including any off-phone activity that has been committed).

Calculated- Required staffing against forecast.

Agent schedules in Genesys WFM.

An Exception.
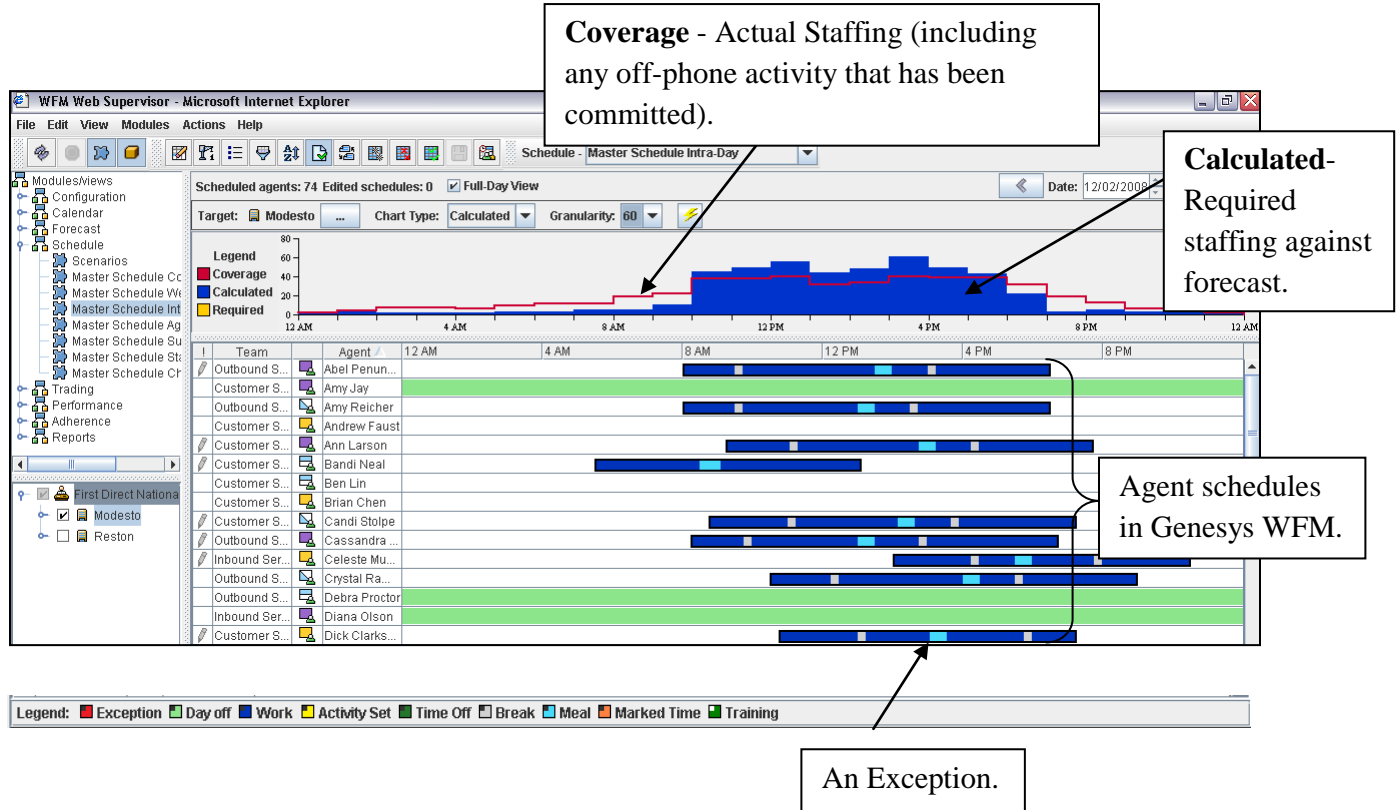
Retrieve Fresh Data from WFM

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

information from Genesys WFM to start scheduling training activity.

Booking Strategy

Booking Strategy gives the user the option to specify whether the training requests should be front loaded, randomly distributed, or back loaded, together with the option to maximize the group size.

By selecting Front Load or Back Load, Genesys Training Manager will try to schedule all of the training sessions at the front or the back of the training window, while taking into account the performance constraints, as in the example on the next page.
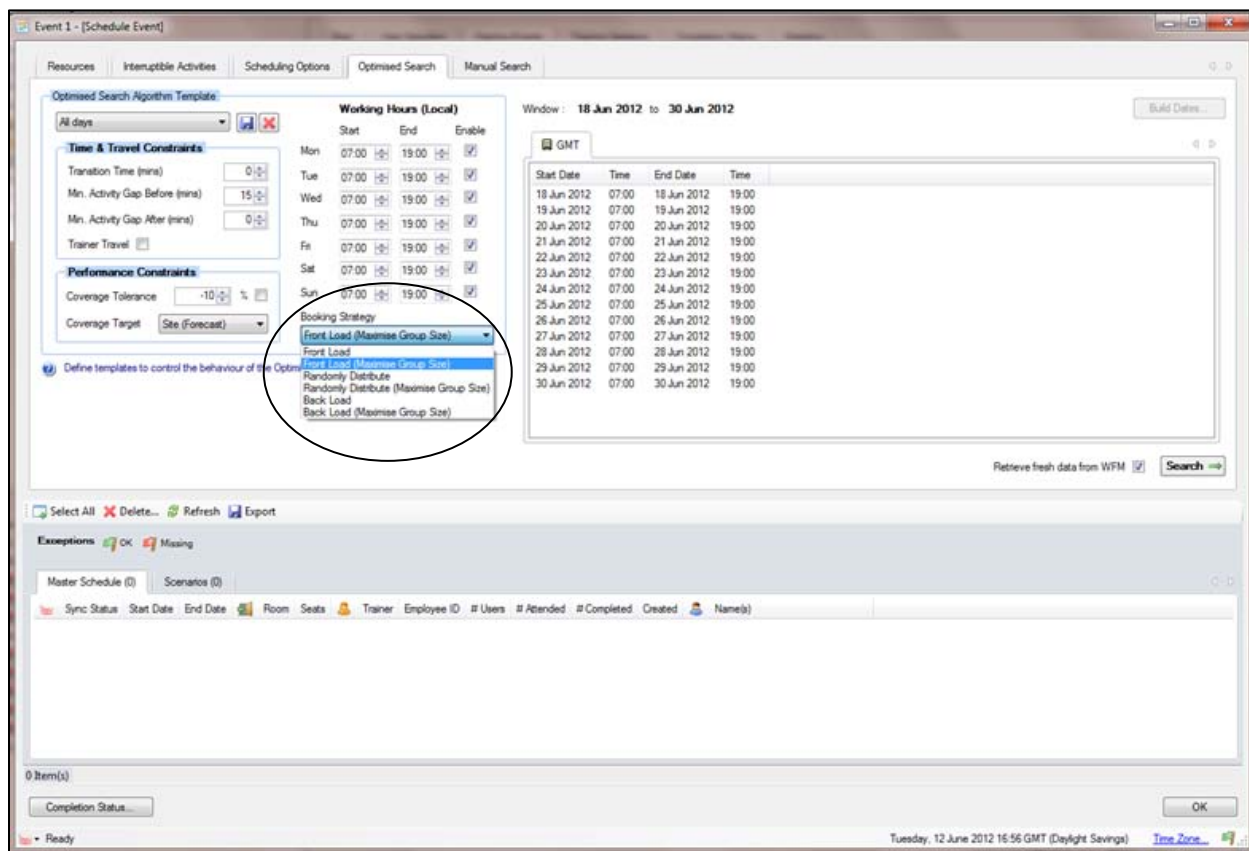
Select `Randomly Distribute` from the drop-down menu under `Booking Strategies` and Genesys Training Manager will try to schedule the training activity across the training window, taking into account the performance constraints, as in the example on the next page.

Once everything has been entered, update the Optimization Search Algorithm Template by clicking the `Save` button. You will have the option to either save the template with the same name, or give the template a new name, which will appear in the drop-down menu as a separate template for selection.

Click `Search` to retrieve fresh data from WFM.

Give the template a new name after clicking on `Save`, or update an existing template.
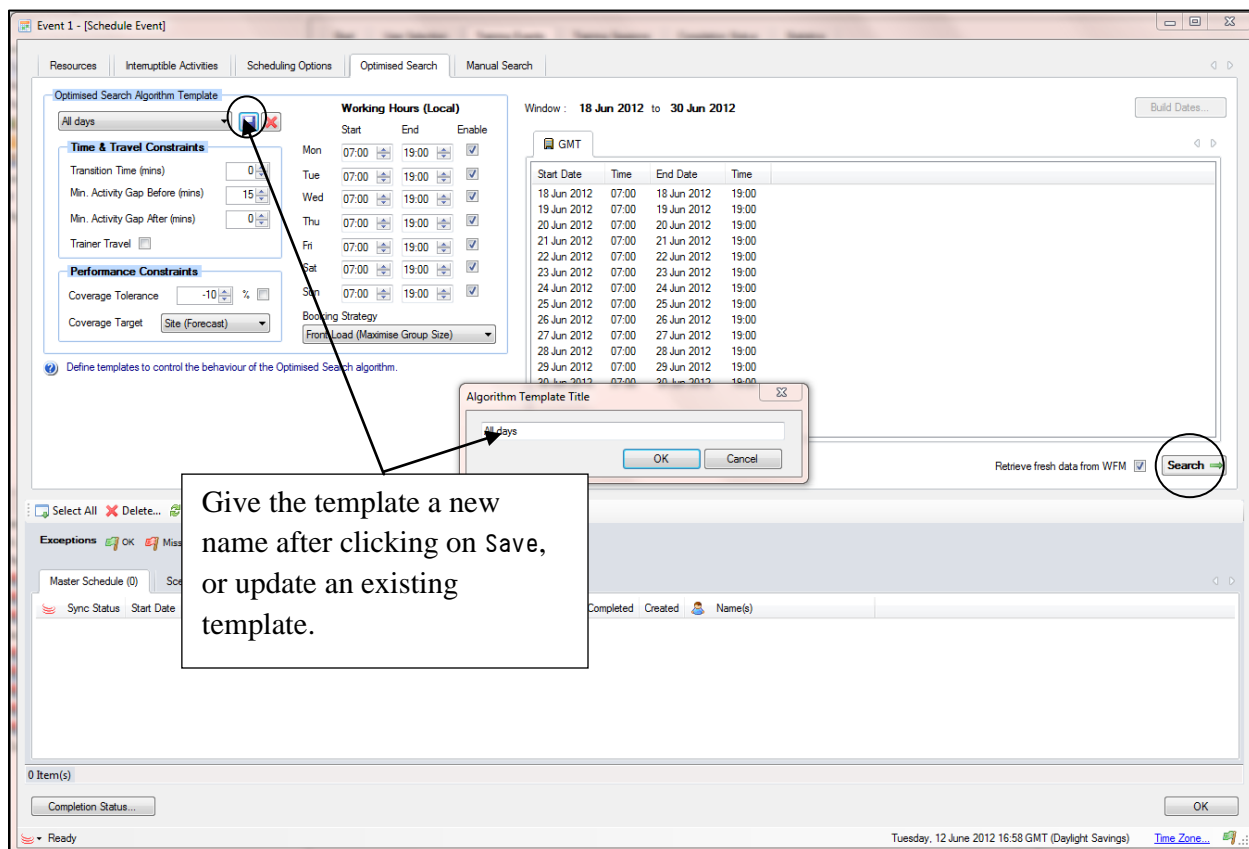
Genesys Training Manager is retrieving information from Genesys WFM, and information about what the application is doing will appear at the bottom of the window.

The option is also available to cancel at any time during the scheduling process. Refresh the screen during the scheduling process will update any training sessions created or after cancelling to ensure that there were no training sessions created prior to cancelling.
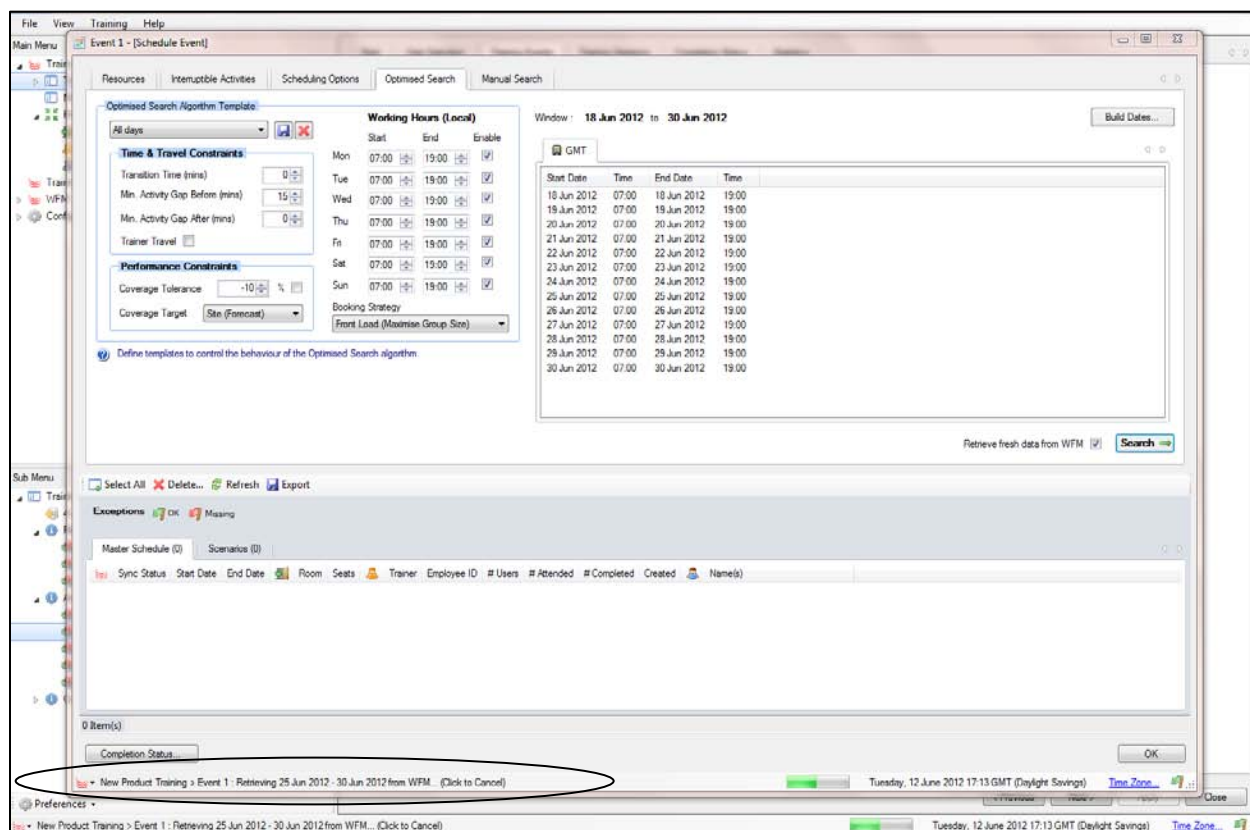
Notification that Genesys Training Manager has finished will be given at the bottom of the screen.
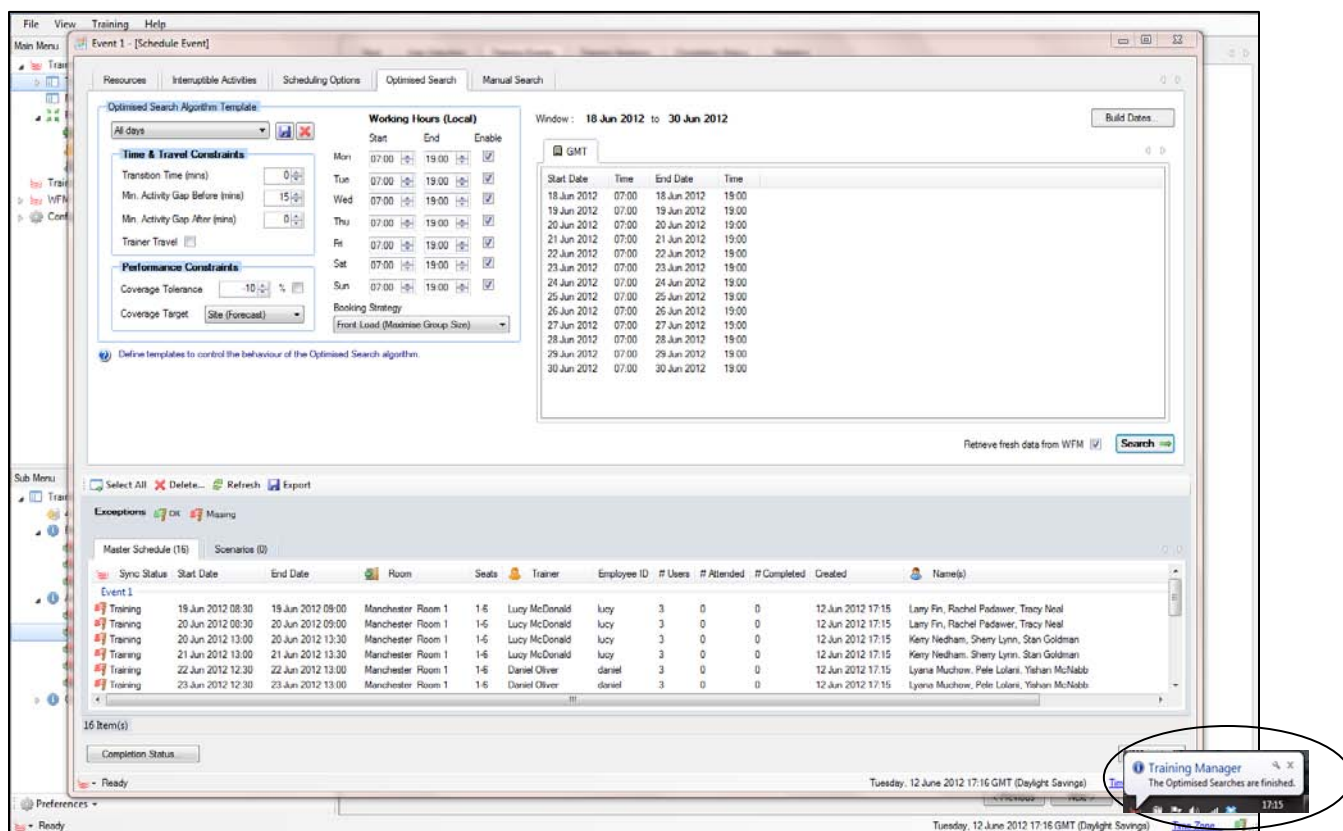
Training Sessions

Once completed, the training sessions are visible in the `Training Sessions` window, and the red flag to the left indicates that the training has been created in Genesys Training Manager but has not been committed to Genesys WFM.

As the training sessions were created using the Master Schedule, the information is visible on the `Master Schedule` tab, together with the number of sessions created. In the example below, the number of sessions is 16.

If a scenario is chosen to run the schedule against to view any created training sessions, the `Scenario` tab must be selected to view the session details.


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

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

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

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

- `Seats`–the capacity of the room.

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

- `EmployeeID`–the trainer's Employee ID.

- `#Users`–the number of agents who have been identified from their shifts in WFM and are available.

- `#Attended`–attendance is updated through the register by the trainer from their web portal view.

- `#Completed`–as per Attended.

- `Created`–the date and the time that the training sessions were created.

- `Name(s)`–the names of the delegates.

- `Completion Status`–selecting this will present the status of all agents selected for training, as in the example on the next page.

To view any additional information select the `Completion Status Report`, which will include the following information:

- `Location`

- `Team`

- `Site`

- `Business Unit`

See the following example.

A gauge has also been included that allows you to view the completeness of the training event. There is an export option in the bottom right-hand corner where you can export the information into Excel.

Export the information into Excel if required.

Filtered view available in drop-down box.

Optimized Algorithm Results for Trainer and Room Only Scheduling

When scheduling for trainer and room activity using the Reserved option, the scheduler only creates training sessions for the room and trainer, taking into account the minimum and maximum group size and the room capacity.

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

OR

by selecting the agents in the User Selection tab and then right-clicking the individual training sessions, as in the example below.
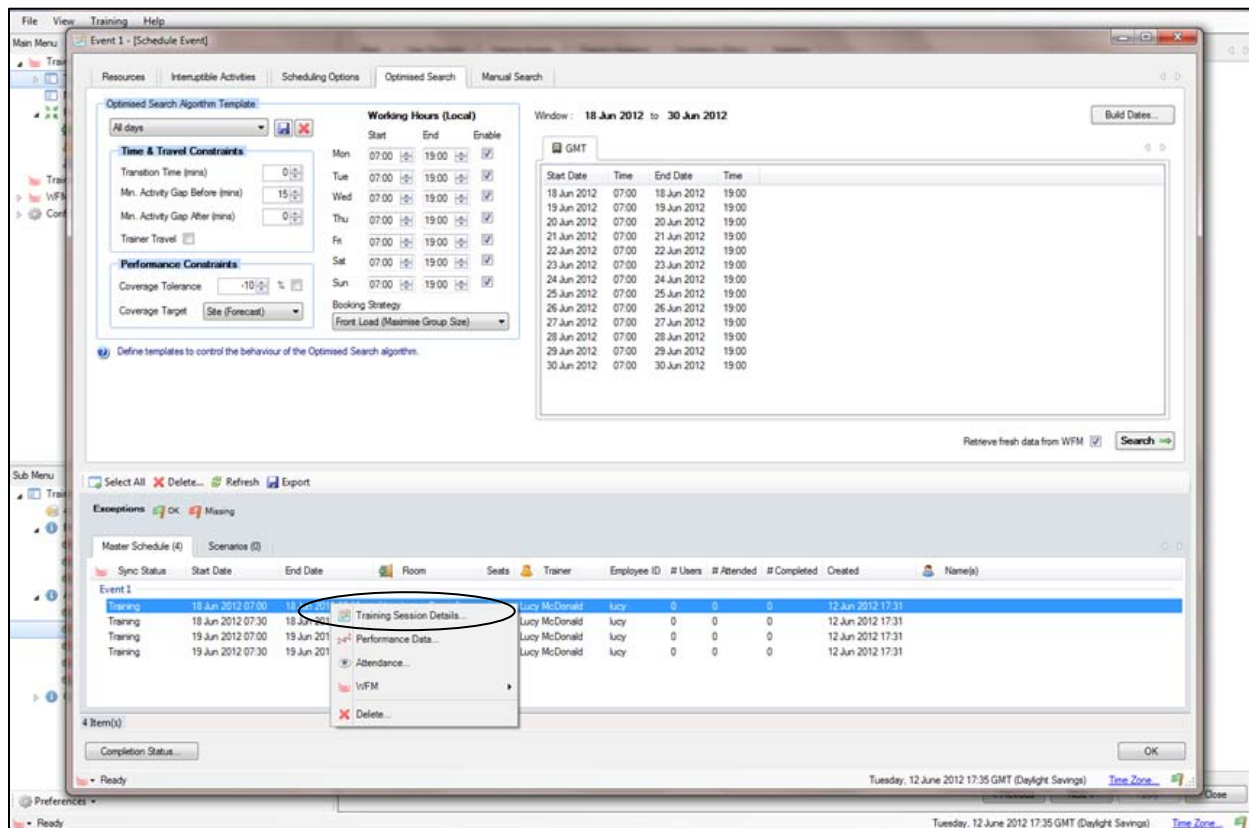
Manually select the users from the right pane and click <Add>. This will assign the user to the training session.

Note: If the user's schedule does not fit the training window an error will appear. This option could be used for an individual user, but deleting the training sessions and re-running the schedules with the users as part of the equation is what we would recommend.

It is possible to amend the training session end time if required using the up and down keys. After selecting OK, Genesys Training Manager will check that there are no conflicts with the trainer or room, or whether the agent schedules still fit within the training session times. If the time is extended, the coverage tolerance will not be taken into account due to the change being manual.
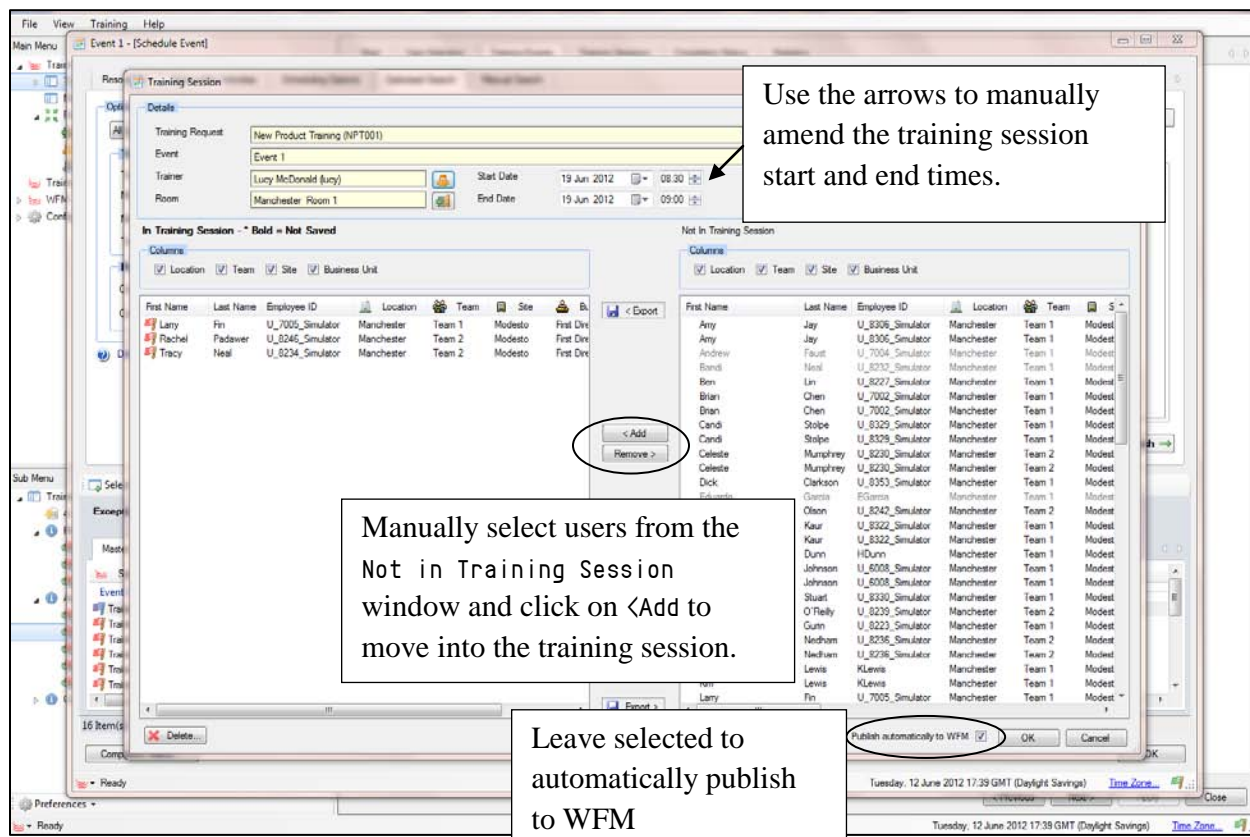
Committing Training Activity into Genesys WFM

The training must be committed to Genesys WFM in order to view the impact. Highlight the training sessions (this can be done in bulk or individually) by highlighting one session and then right-clicking it and selecting `Genesys WFM`, or use the `Select All` button.

After selecting `Genesys WFM` the available options are:

- `Publish`–this will commit the training session and publish in WFM.

- `Remove`–this allows for the training sessions to be removed but still keep the created training session details.

To remove and delete the training sessions, either click `Delete` or click `Select All` and then click the

 button.
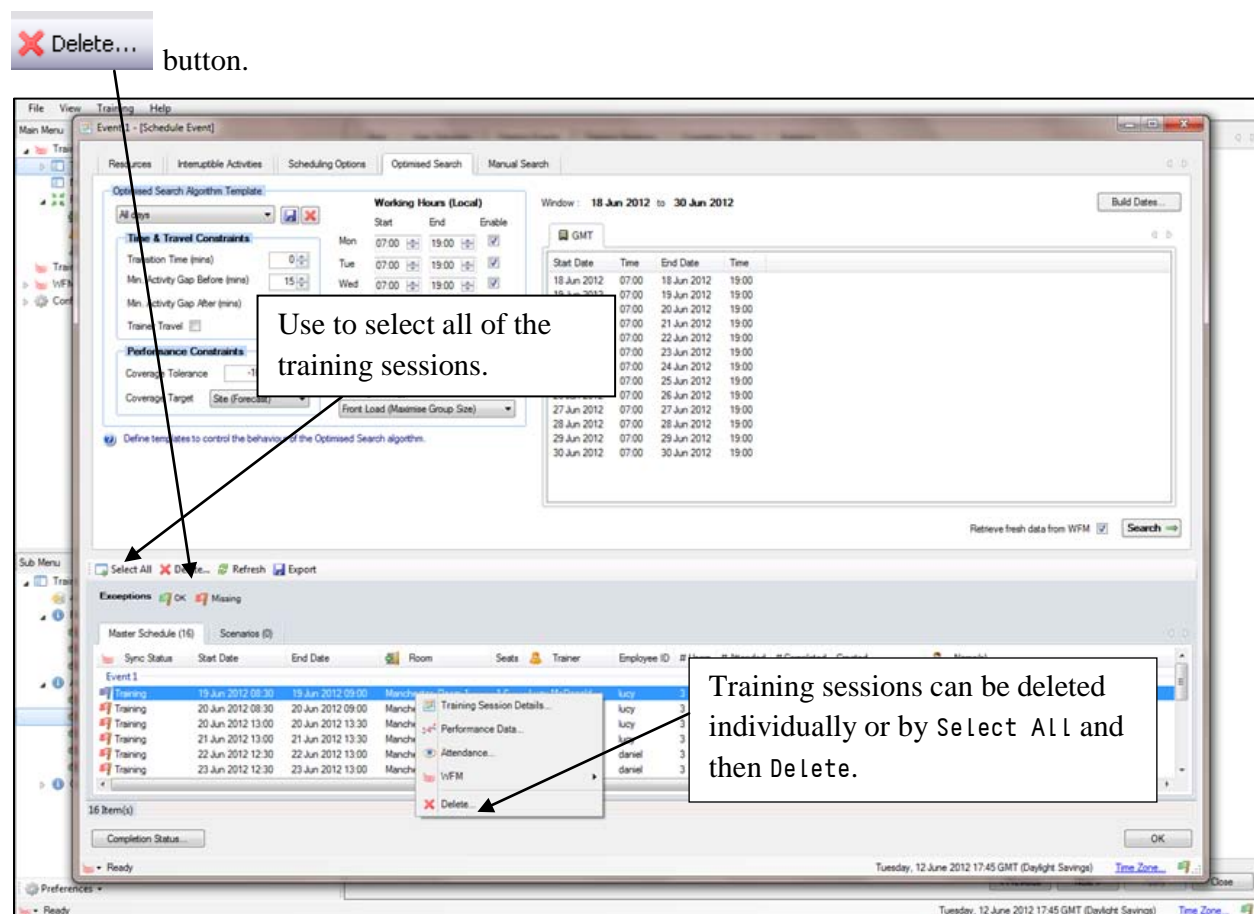
If you select `Publish`, Genesys Training Manager will then start to commit the training to Genesys WFM. A pop-up window will appear alerting you that publishing the training sessions may take a few minutes. Click `Yes` to continue.
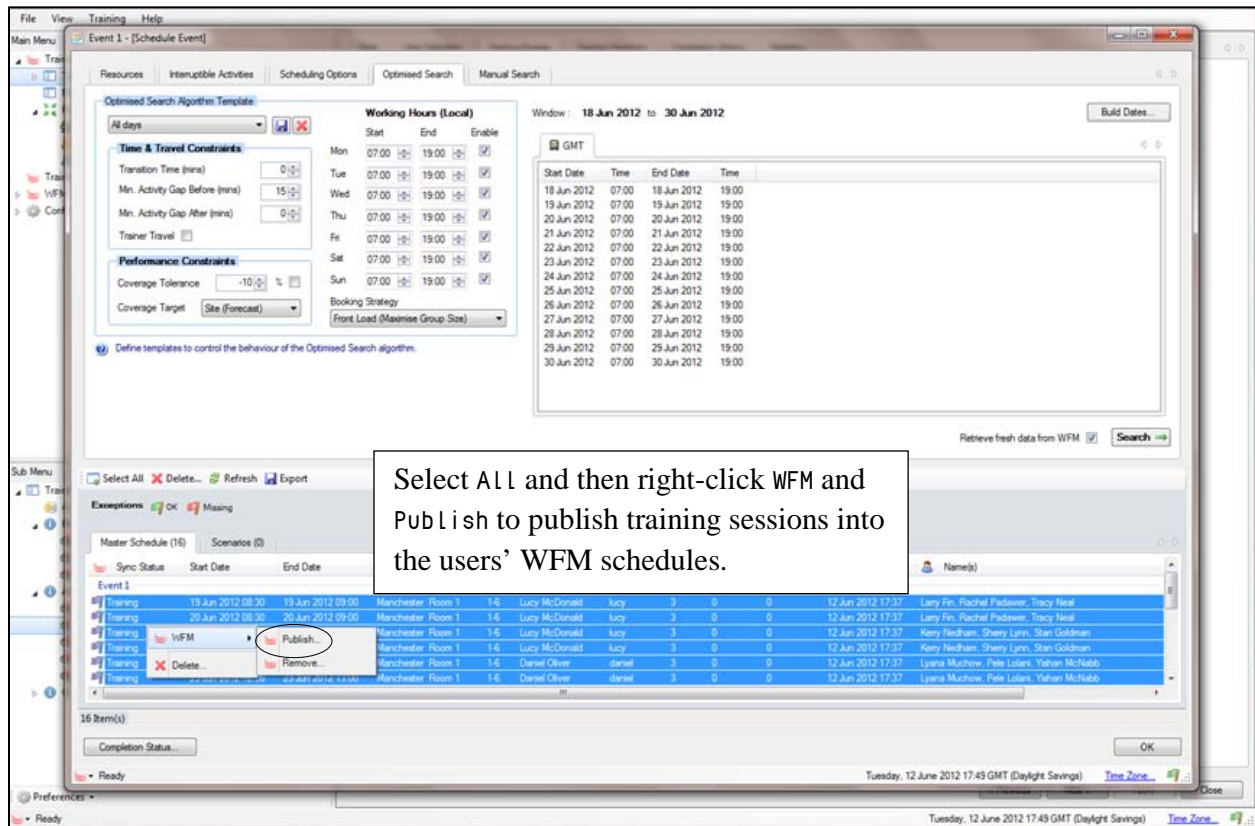

When publishing is complete, flags will turn green to confirm that the training exceptions have been committed to Genesys WFM.
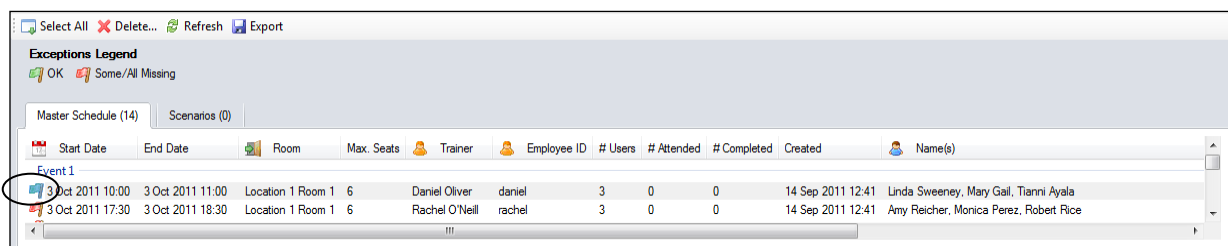
In Genesys WFM, select `Get Data` to refresh Genesys WFM with the new exceptions.

Genesys WFM Intra Day Schedule will now include the training exceptions in WFM within the schedule or scenario selected in the `Resources` tab. Genesys Training Manager has inserted the exception into the relevant agent schedule, which has automatically reduced the coverage by the number of agents and the time and duration of the training.

Genesys Scheduled Intra Day view.

Master Schedule is selected. You can also select a Scenario.

Coverage reduced due to the training scheduled.

Select `Get data` to retrieve the training exceptions.

Exception shown in the Legend.
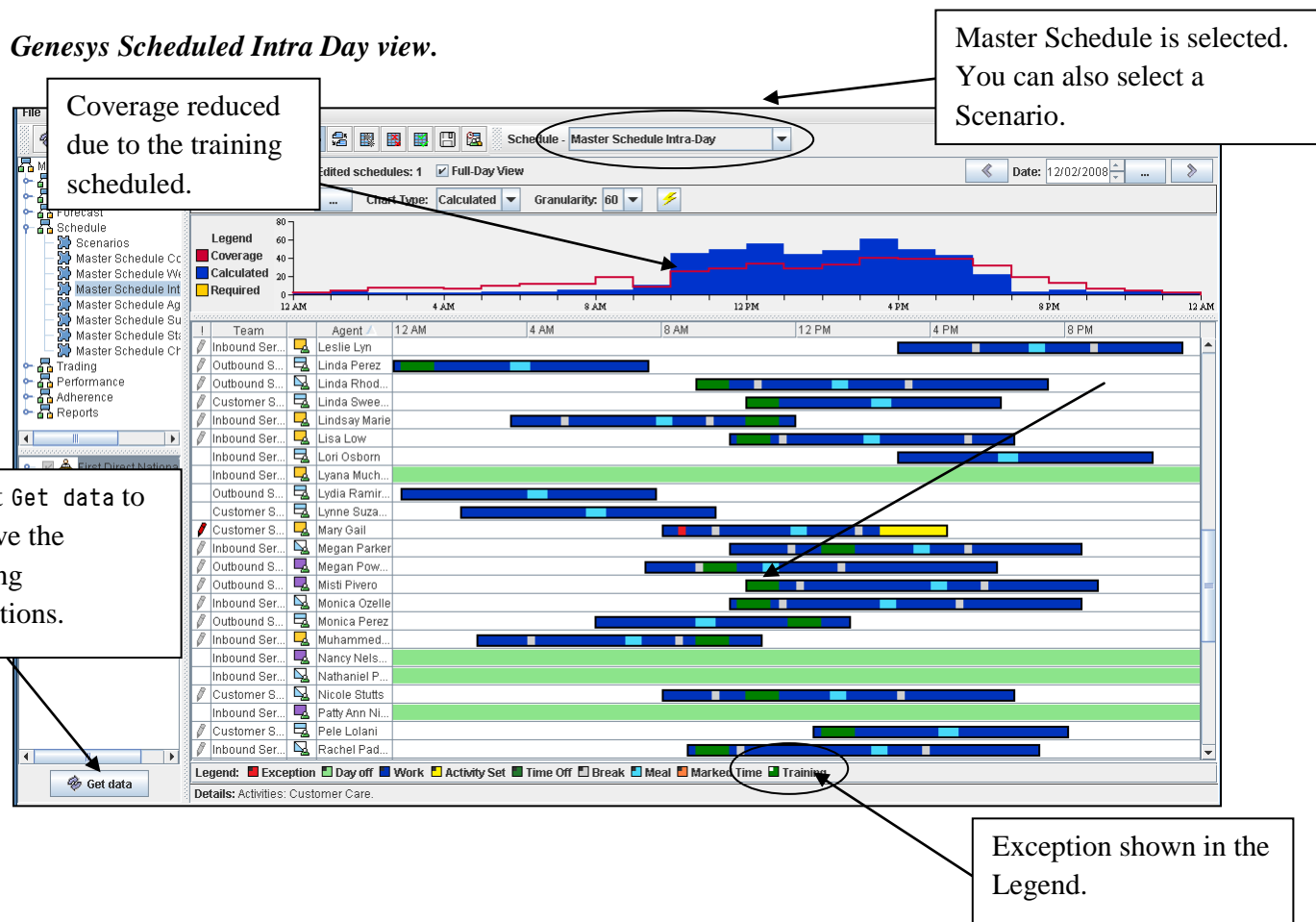
Cancelling a Training Session

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

To cancel a training session and remove the exceptions from Genesys WFM, highlight the training session to be cancelled and then right-click it and select `Delete`, or use the ![Delete button] button.

There is also the option to just remove the training sessions from WFM to view whether the training needs to be cancelled if by taking agents of the phone for training will impact performance.


Select `Delete` after highlighting the session.

Select `Remove` to just remove the exceptions from the agents schedules and keep the training sessions in Training Manager.
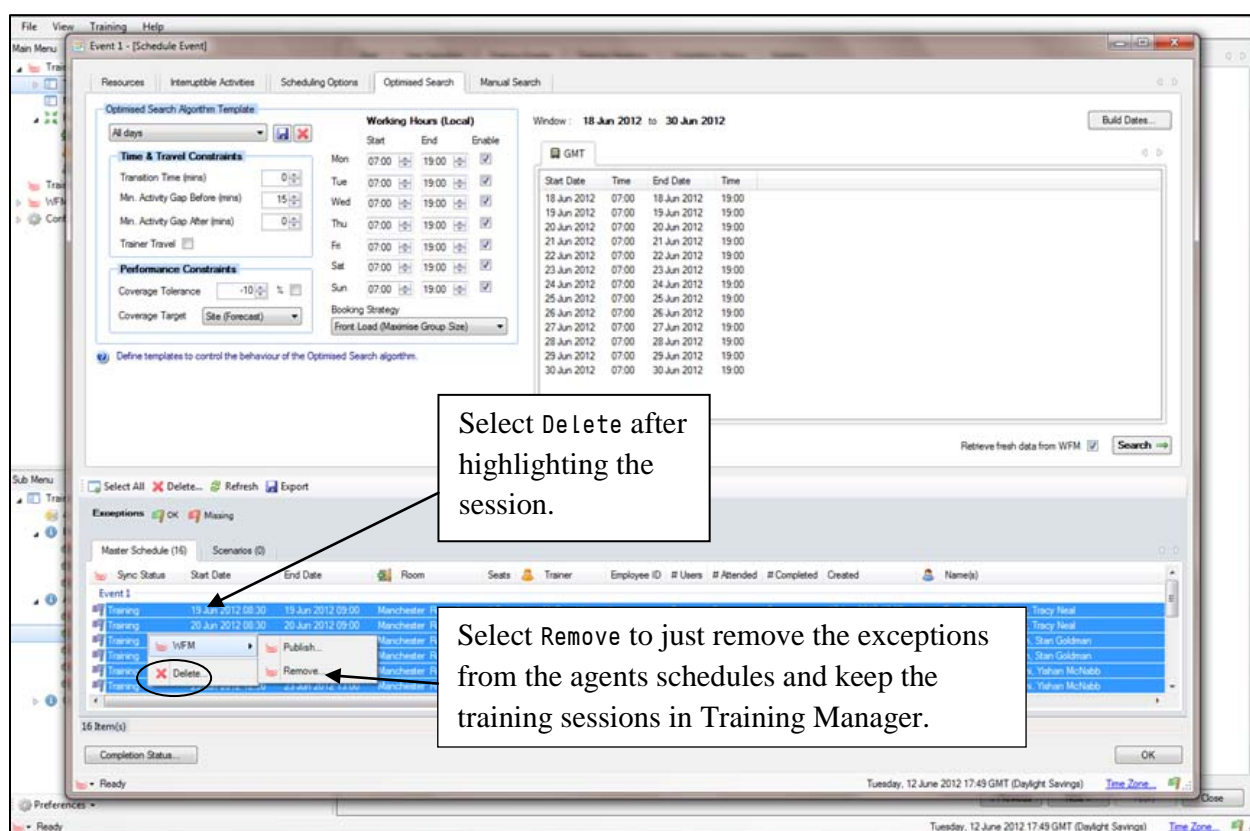
The session will be removed from the `Training Sessions` window and the agents that were scheduled for that session will be identified as unscheduled when viewed in the `Completion Status Report`.

The exceptions will be removed from Genesys WFM after refreshing the data.

# Cancelling a Training Session for an Individual

A training session can be cancelled for an individual by expanding the training session, right-clicking the session, and then selecting `Training Session Details`. This will list all of the delegates for that training session together with the room and trainer if they have been scheduled as part of the training session. See the example on the next page.
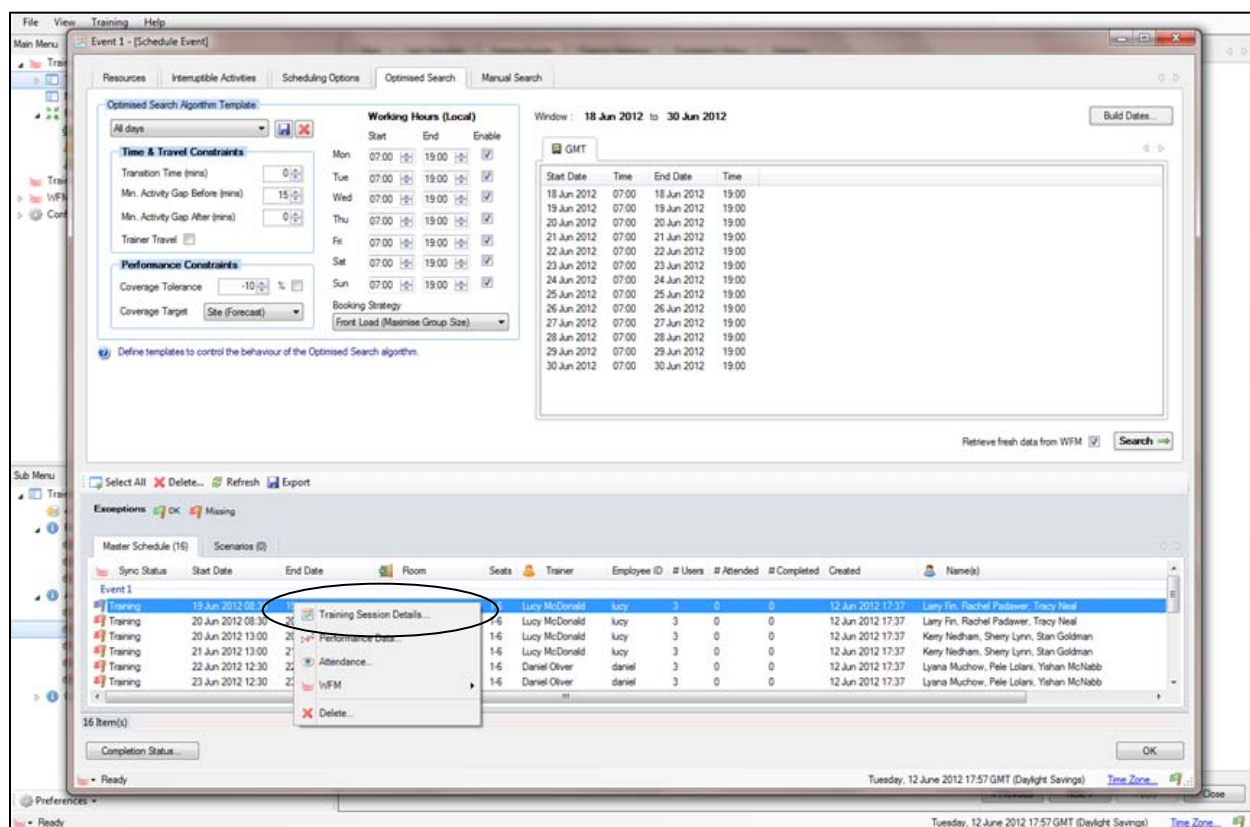
Once the agent details are visible in the `Training Session Details` window, users can be manually removed by highlighting the individual and clicking `Remove`. This will remove the user and put them in the `Not in Training Session` pane on the right.
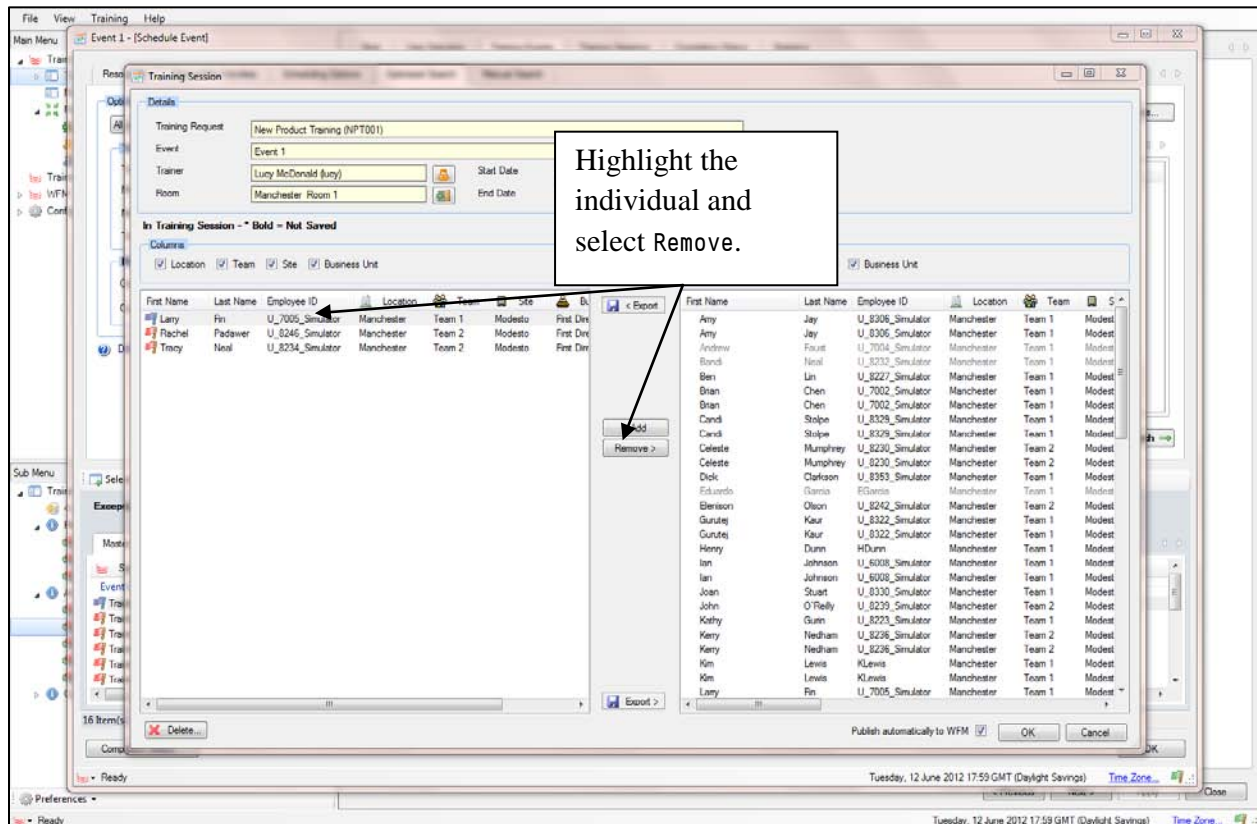
The agent will then appear in the `Completion Status Report` as unscheduled.
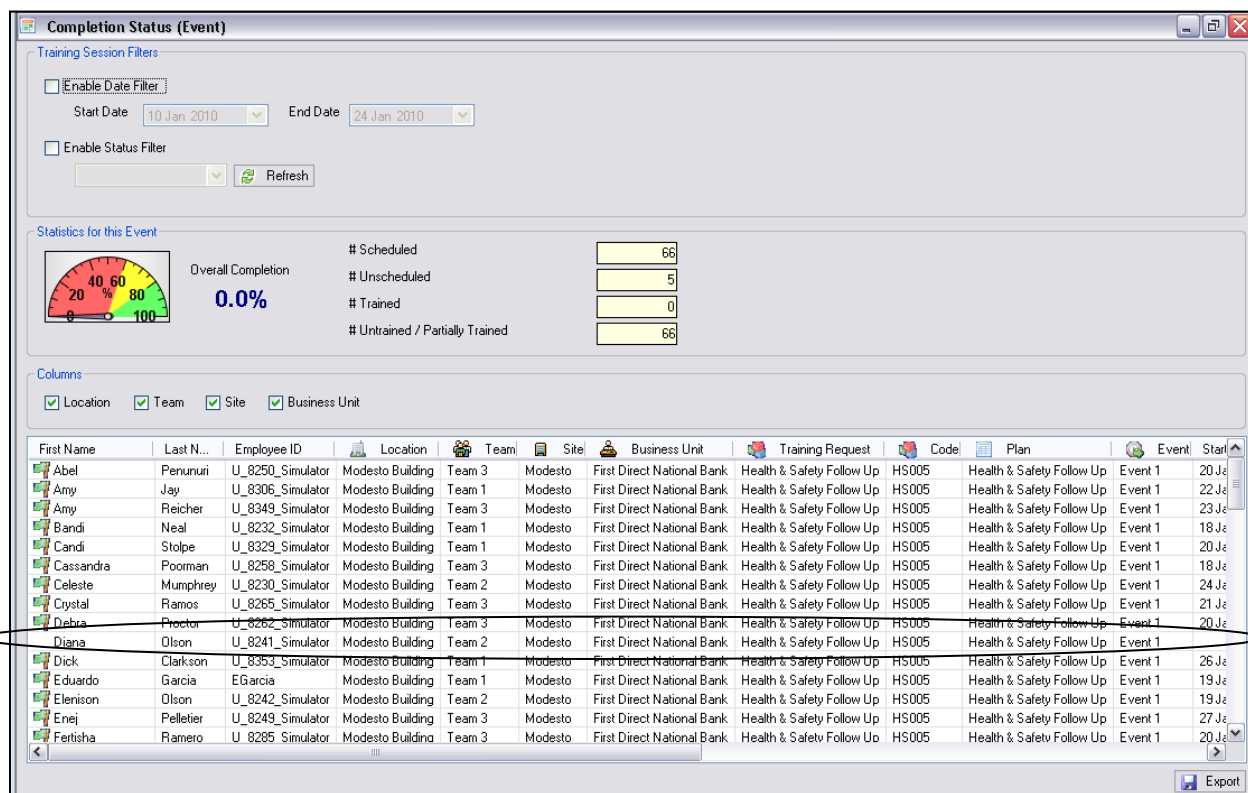
Agents that have not been scheduled or have not attended the training and need to be scheduled later will remain as part of the original training schedule and can then be scheduled as "Mop Ups" if required.

Scheduling Mop Ups

Agents can be scheduled as part of the original schedule using the Mop Up process. The application will take any agents that have been identified as unscheduled (this will depend on the reason; for example, if the agent has not been scheduled any training activity due to them not having a schedule in WFM they will remain unscheduled) and look at scheduling them for a training session within the original constraints. For example, training window dates, days, hours, and minimum and maximum training numbers in a session.

To schedule agents that have either not been scheduled or have missed training, return to the Scheduler. To access the Scheduler, click the `Training Events` tab, select the event, and then select `Schedule Events`.
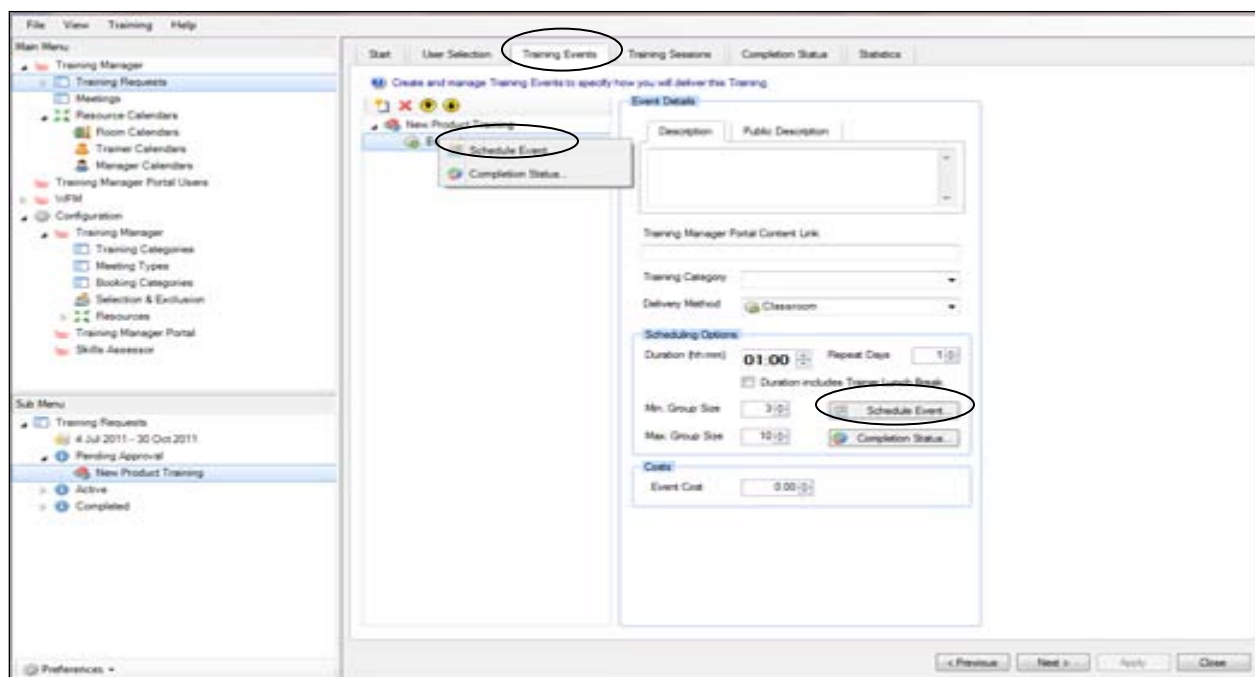
To re-run the Scheduler, select `Search`; the Scheduler will schedule any unscheduled agents for further training sessions, taking the original constraints into account.

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

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


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

Trainer and Room Hot Swaps

Trainers and / or rooms can be manually changed at any time within a scheduled training session.

To make any changes, the `Training Session Details` window has to be visible, as in the example below. To hot swap a room or a trainer, click the icon to the right of the room or trainer and the tree view with the trainer and room details by location appears. See the example below.
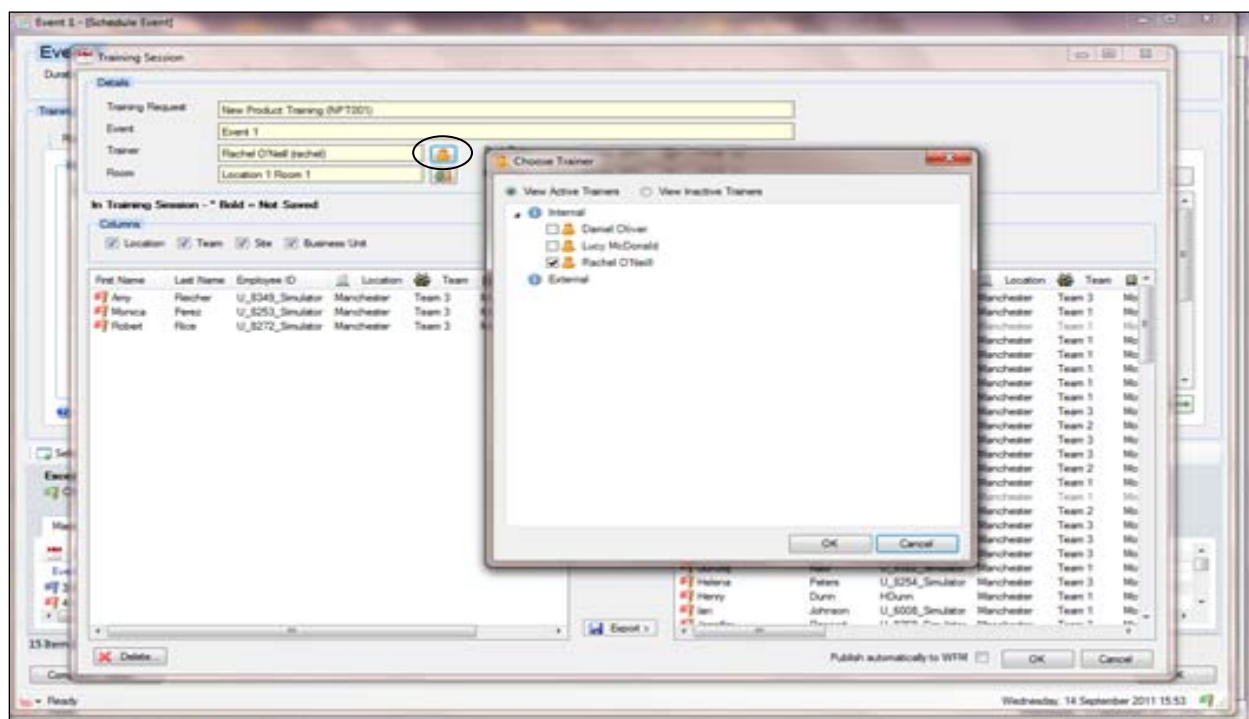
In the example below, Room has been selected, and the option to choose a different room appears.

After selecting an alternative room, click OK.
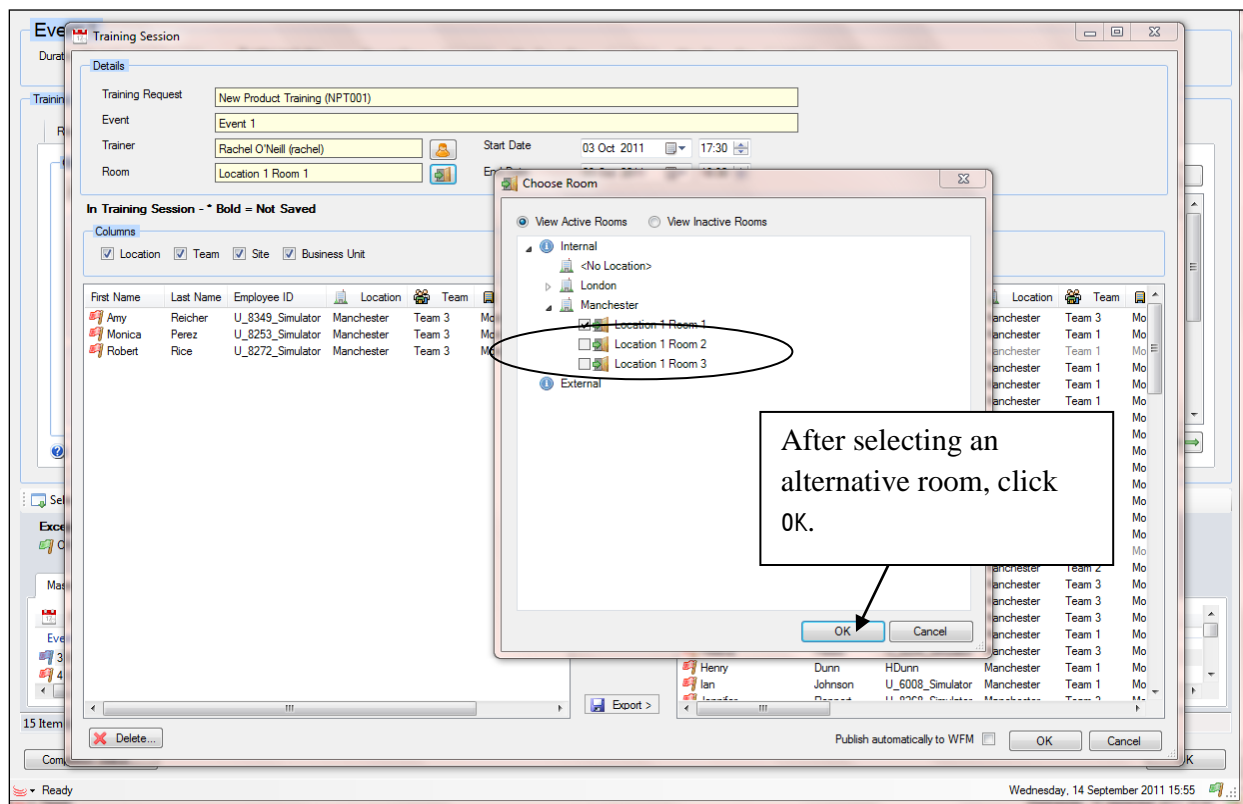
The application will then check to make sure that the room is available using the information in the Room Calendar and it will also make sure that there is sufficient capacity for the number of users selected.

If the room is not available for any reason, an error will be displayed to the administrator allowing them to select another room, as in the example on the next page.

Once the training session has been updated with the new information, the relevant amendments will be made in the associated calendar entries.

Apply the same process when changing the trainer.

Error due to room conflict.
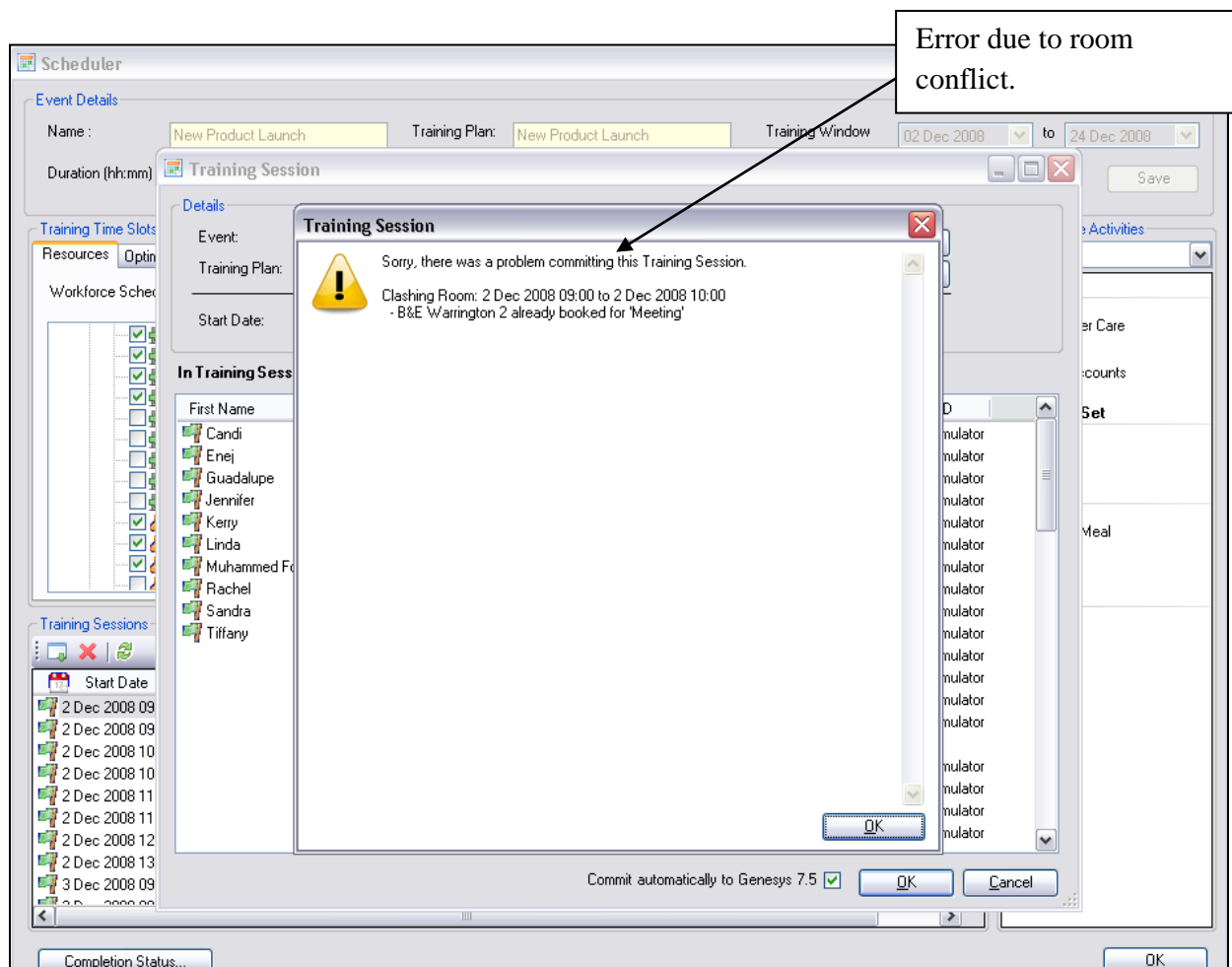
Using Scenarios for "What If" Scheduling

When using scenarios to view the impact of the training before committing it to Genesys WFM, the process is exactly the same until you reach the `Resources` tab. In the `Workforce Schedule` select the required scenario from the list of available scenarios in Genesys WFM. In this example multiple scenarios have been selected to cover the training window.

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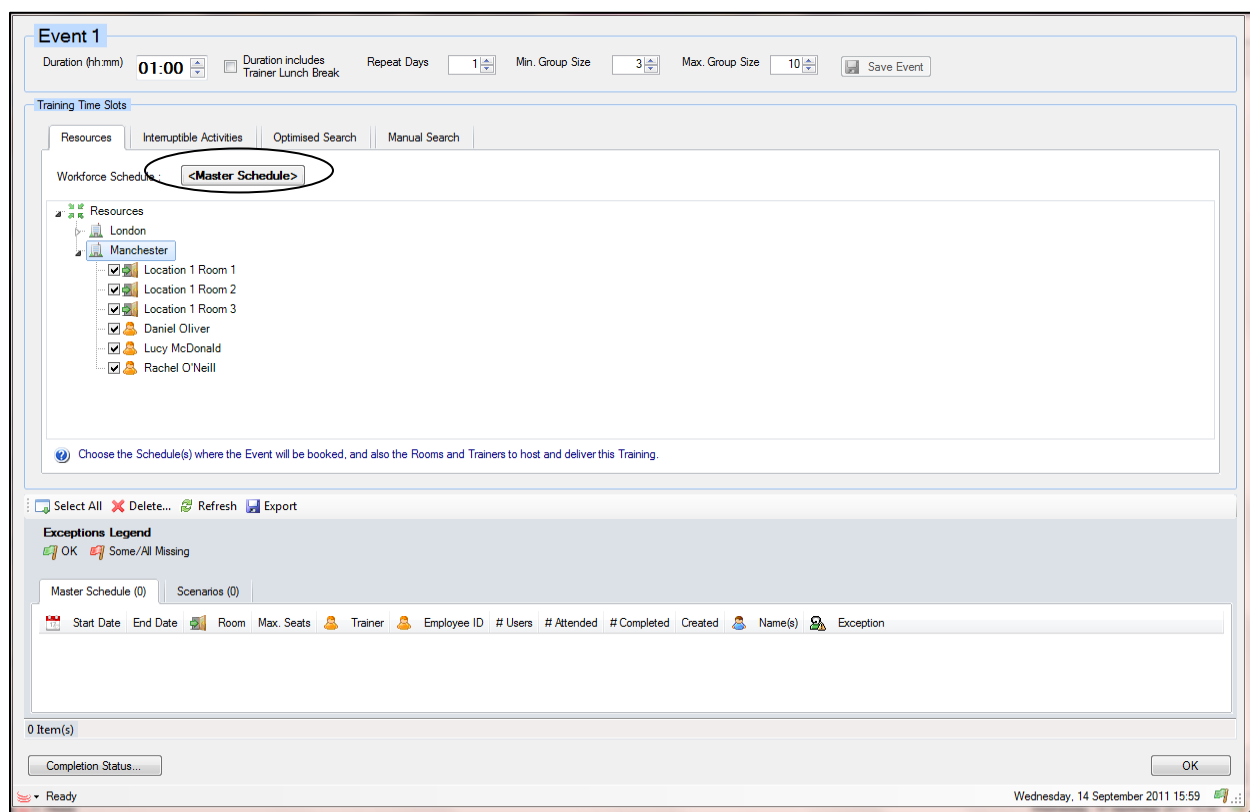

After selecting the Scenario, continue as usual, selecting `Search` once all of the information has been entered.

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


Click on the `Scenario` tab to view the training sessions when scheduling into a scenario.
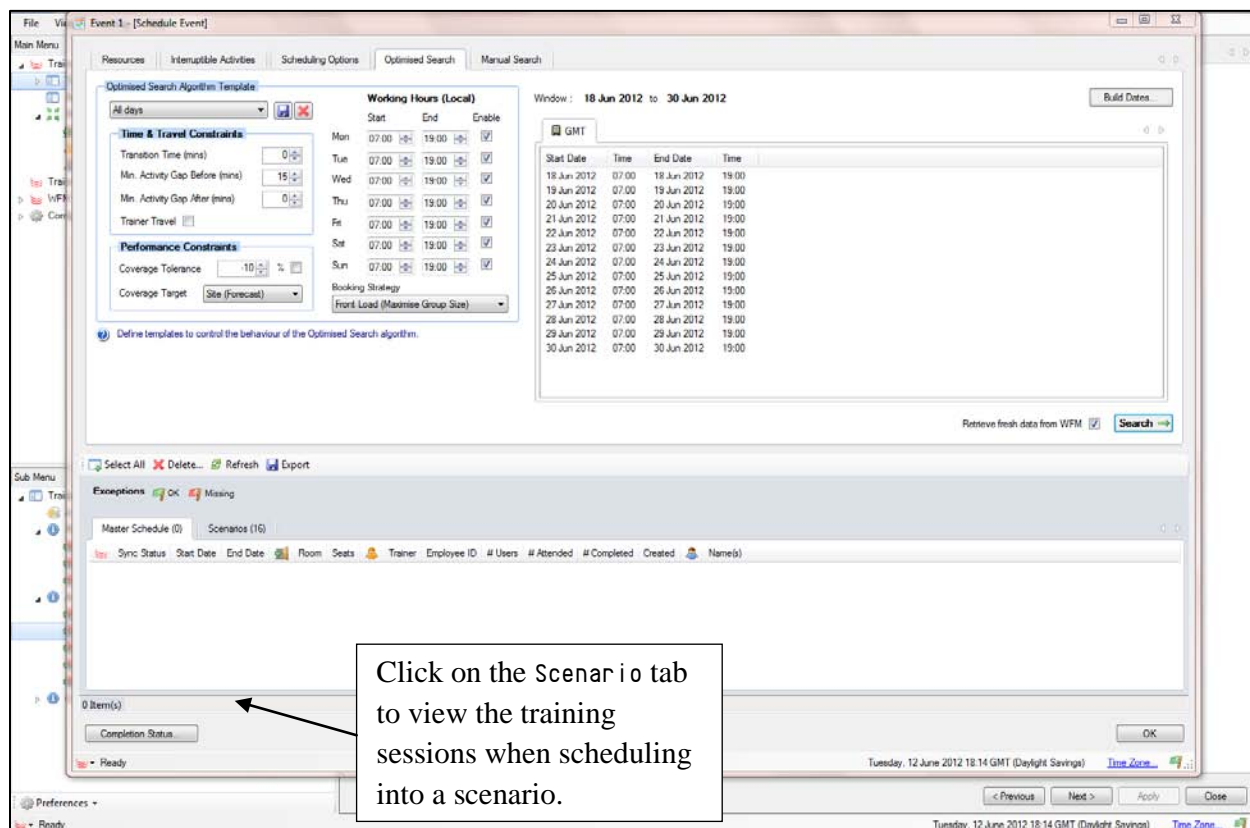
Below is an example of training sessions visible in the Scenarios tab.

Click to view the Completion Status Report.

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

In this example it clearly identifies that the results are for the Scenario.
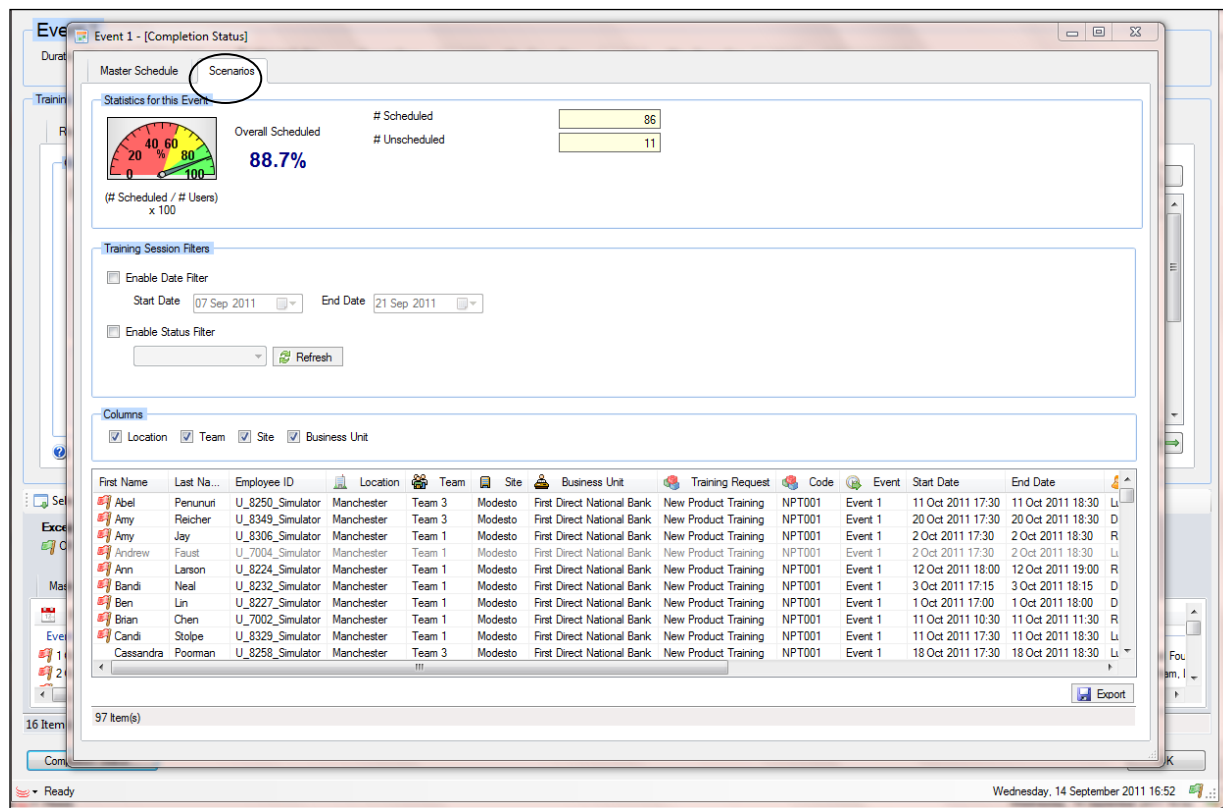
To publish the training sessions into the Genesys Scenario, select the training sessions and then right-click to select Genesys WFM and then Publish.

Once the training sessions have been published the flags to the left of the training sessions will change color.

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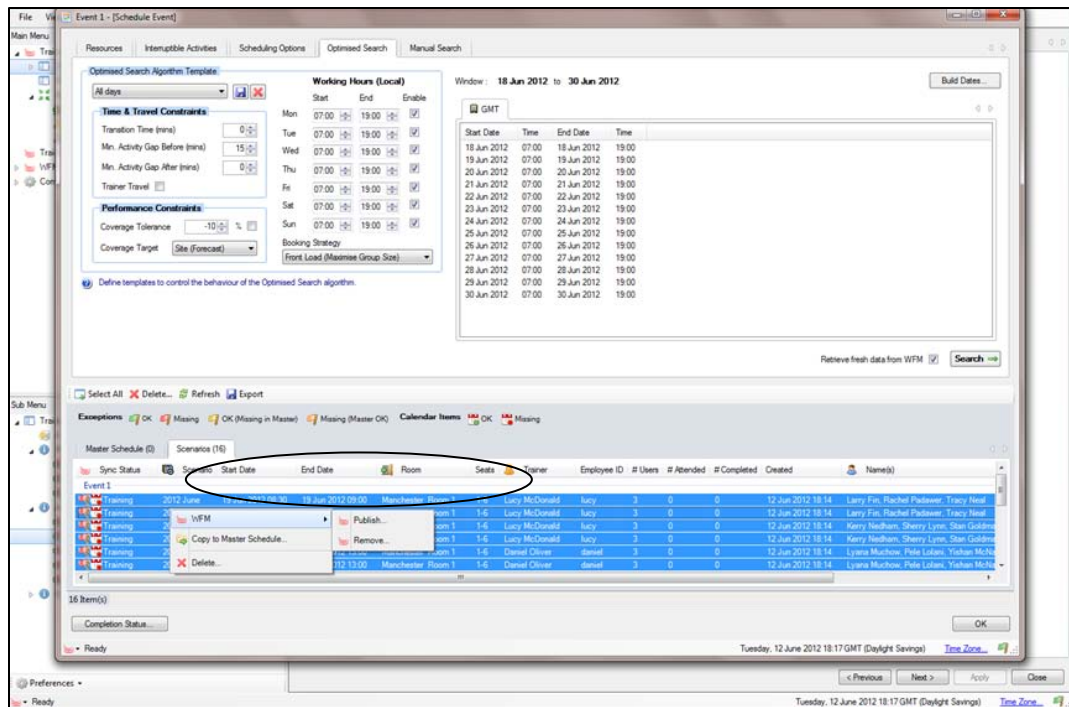

Once the training sessions have been published to the Scenario, there is an option to remove the training sessions without deleting them by selecting Remove.

To copy the training sessions over to the Genesys Training Manager Master Schedule for publishing to the Genesys WFM Master Schedule, select the training sessions and then select Copy to Master Schedule.
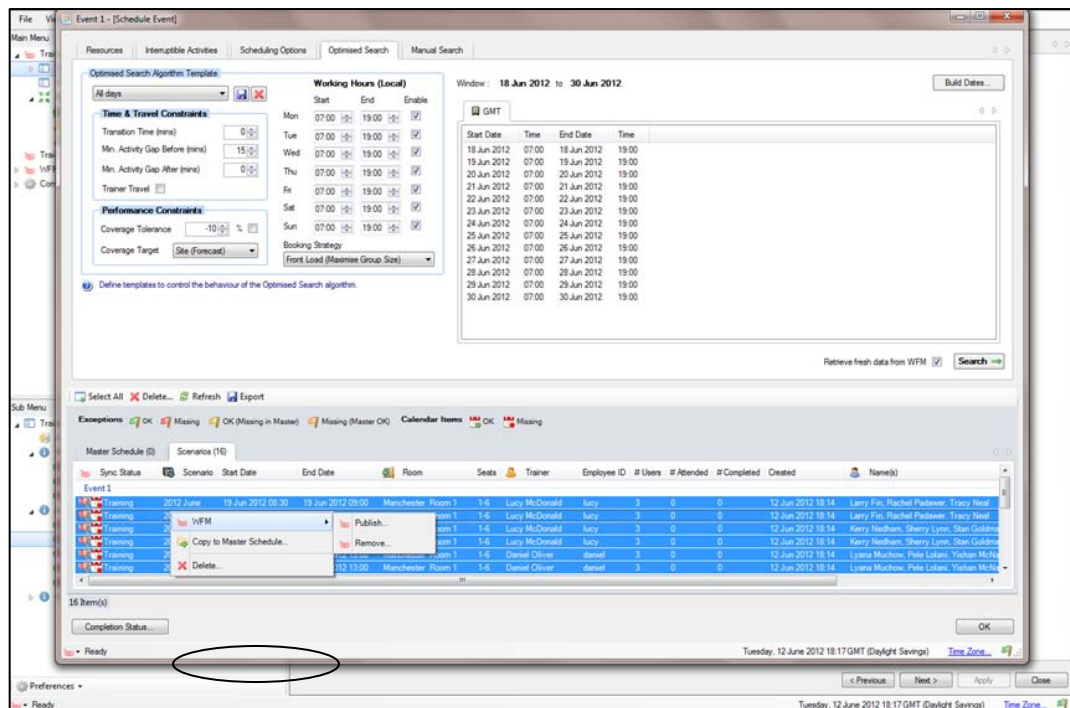
Click the `Master Schedule` tab to view the training sessions.
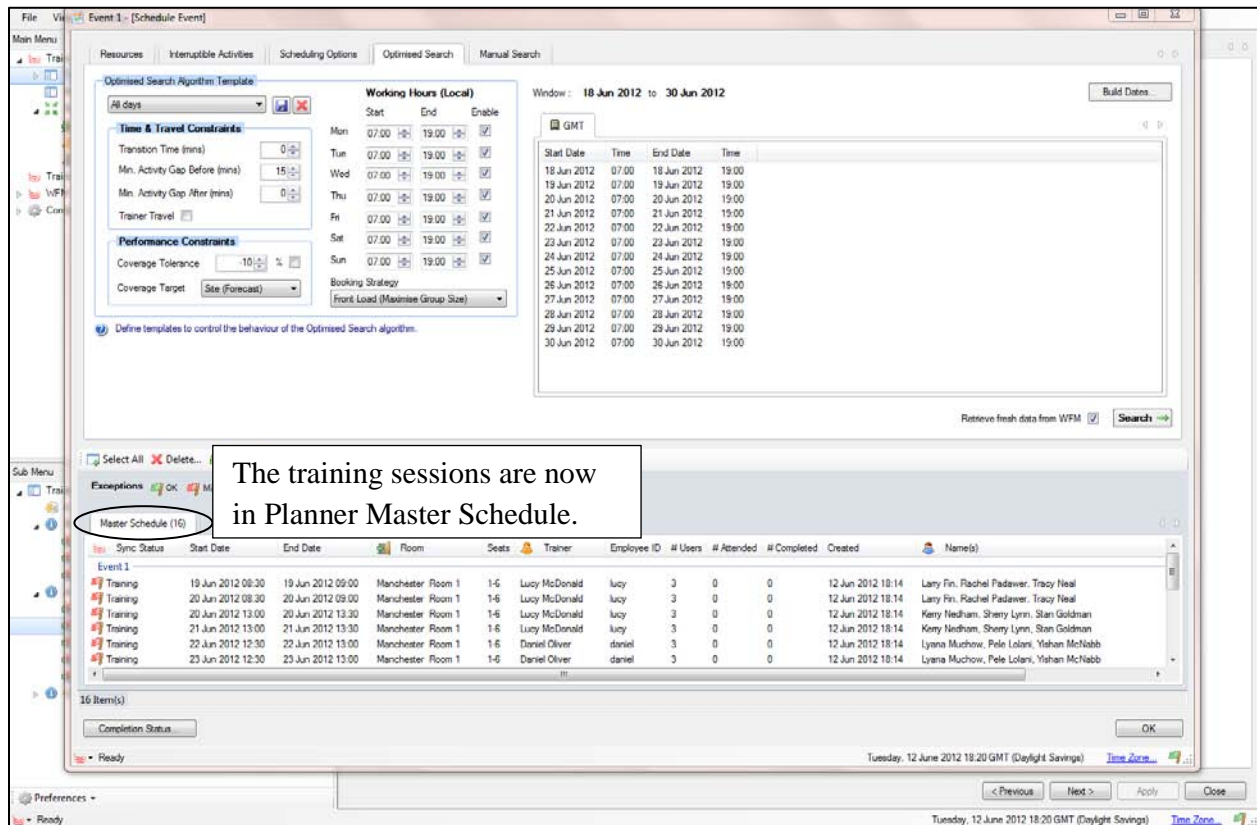
To commit the training session to Genesys WFM Master Schedule, select the training sessions and then right-click `Genesys WFM` and select `Publish`.

The same option is available to remove the training sessions in Genesys WFM without deleting them by selecting `Genesys WFM` and then selecting `Remove`.
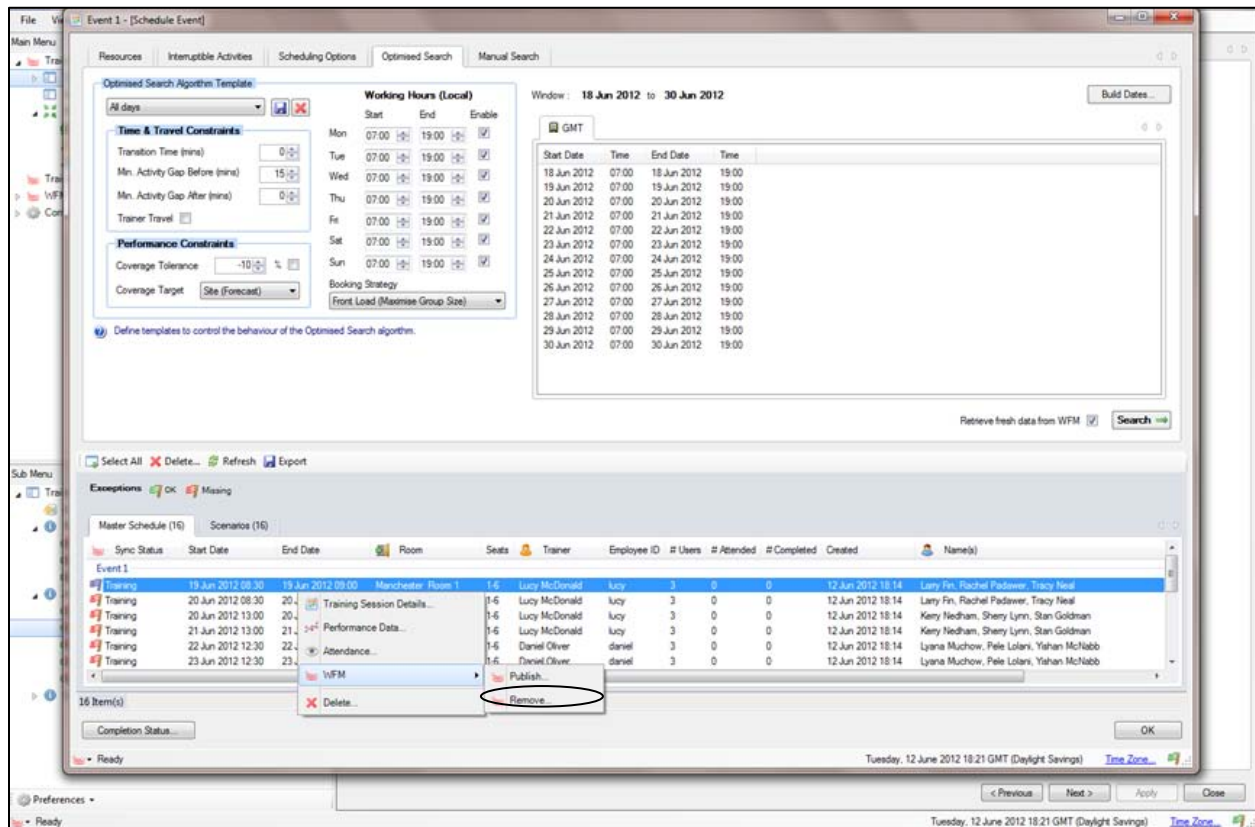
Once the training session has been committed to the Genesys Training Manager / Genesys Master Schedule, continue scheduling using the Scenario. The training sessions *must* be deleted in the Master Schedules. To delete training sessions in the Master Schedules, select the Master Schedule training sessions and then select `Delete`.

To continue using the Training Request directly with the Master Schedule in Genesys WFM, the Scenario *must* be changed to the Master Schedule on the `Resources` tab.

Right-click the Scenario and select `Remove`, then click the `Master Schedule`.

Then click Use the Master Schedule and click OK.
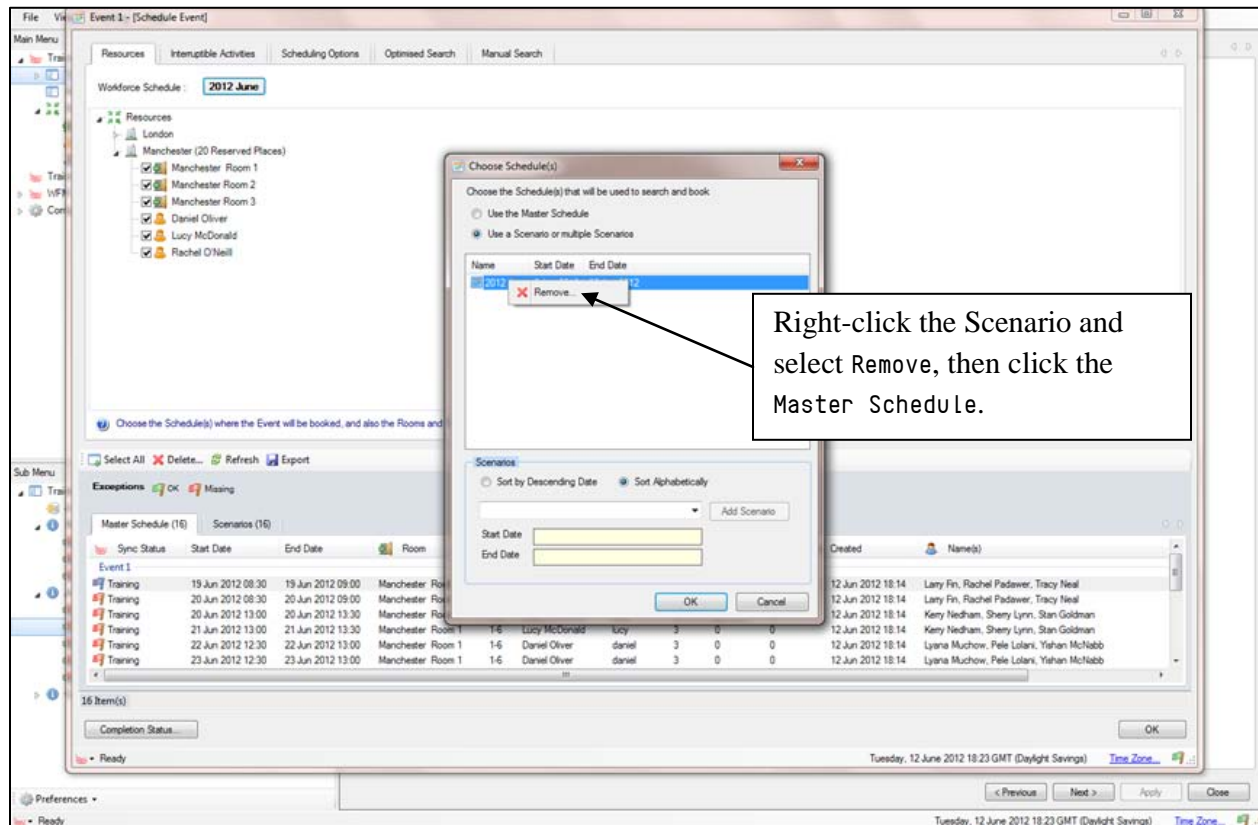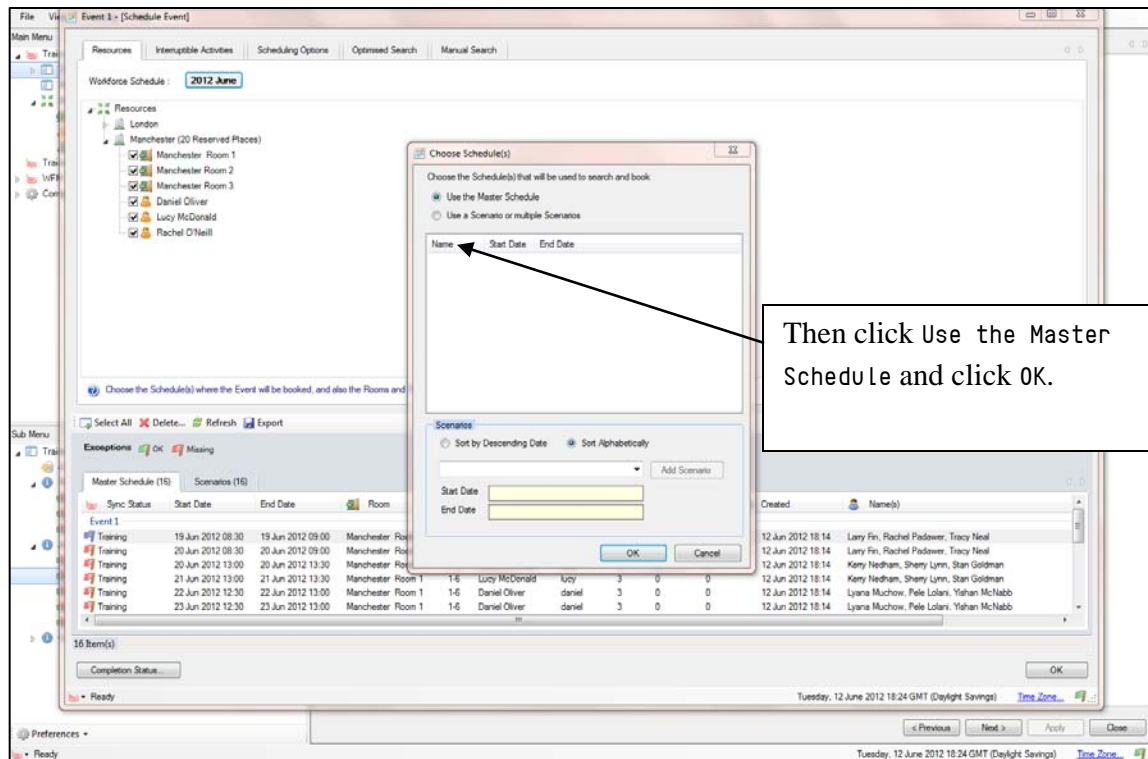
You must also delete any training session on the Scenarios tab.


Delete the training sessions.
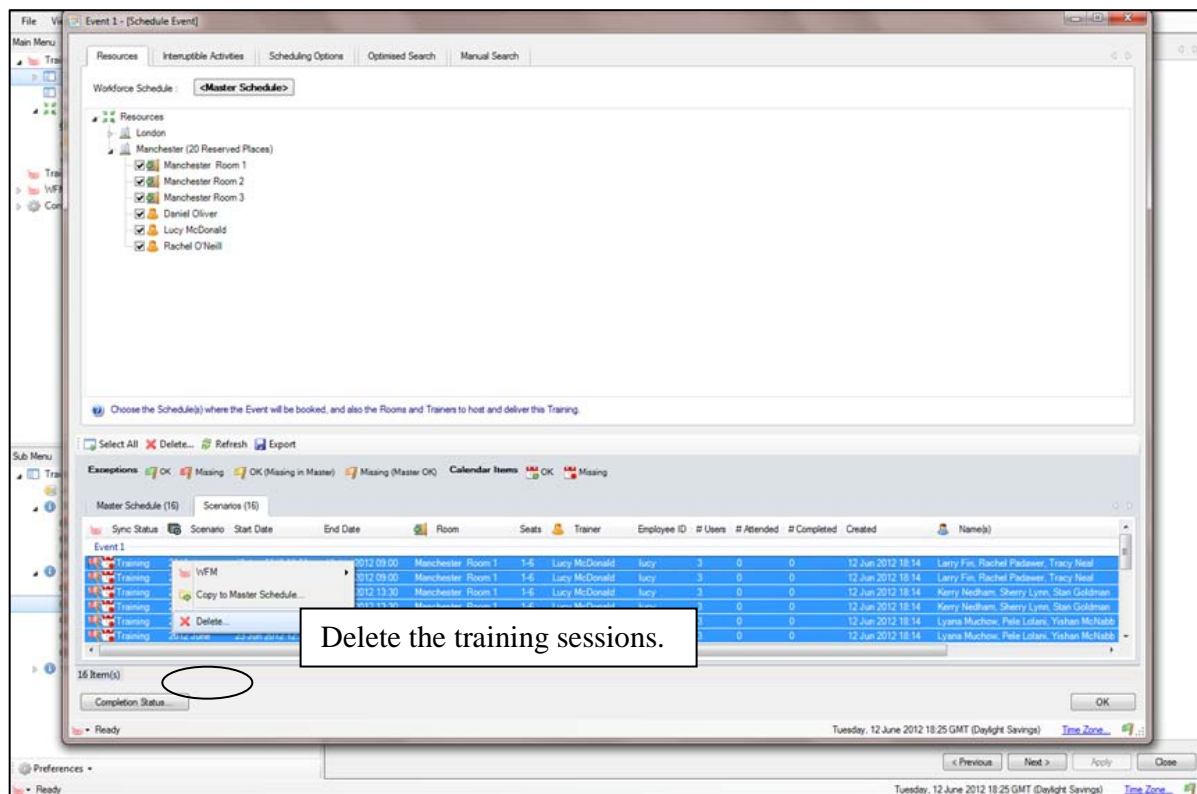
Manual Scheduling

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

To schedule training session manually, the Training Request template needs to be completed up to the Scheduler or Optimization Algorithm Template option.

No resources are pre-selected as part of the manual scheduling process.

Select `Manual` from the tabs available; the `Training Time Slots` window will change as in the example below.
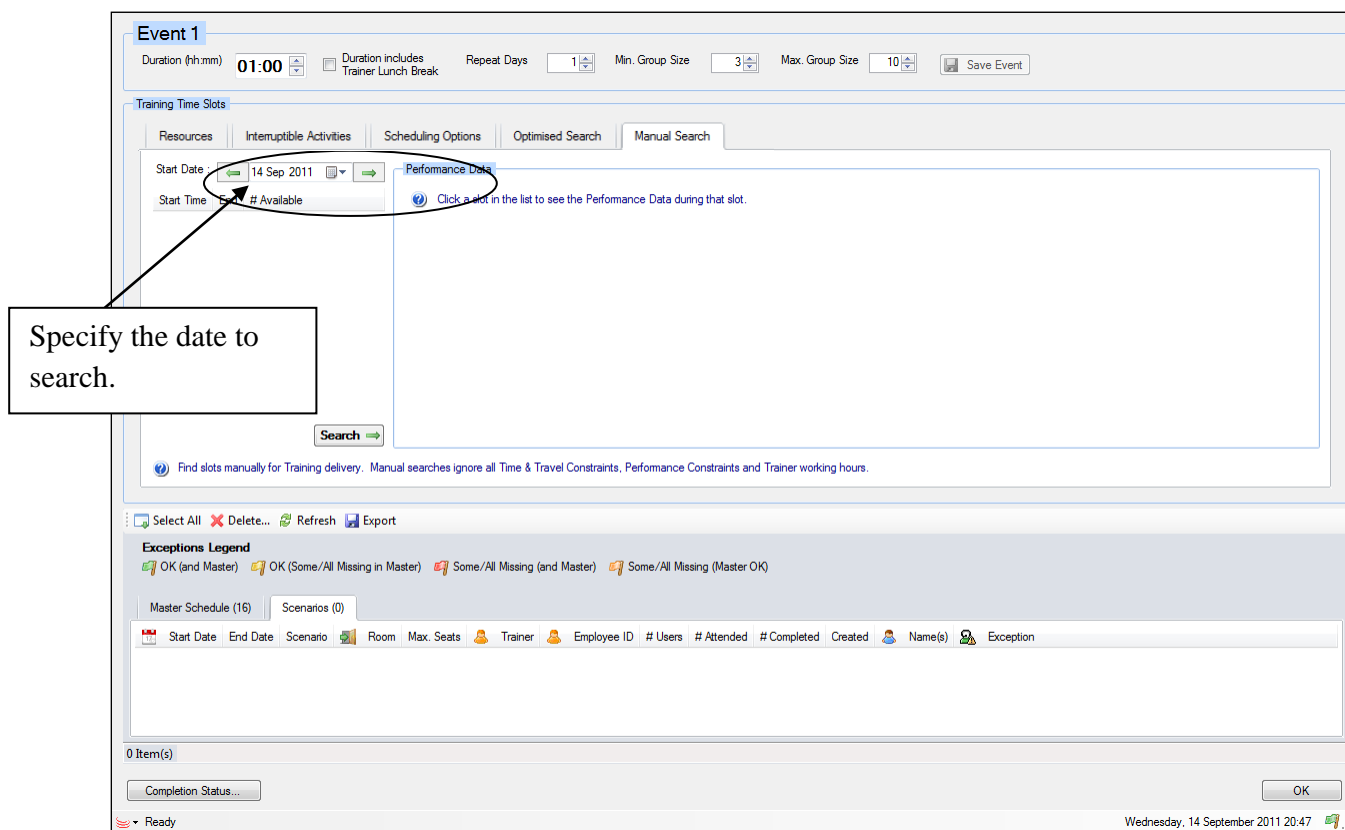

The Event Details information is still visible, which identifies the name of the training together with the training window, duration, and minimum and maximum group sizes. This can be amended if required.

The date to search for users who fit the training criteria must be specified in the `Start Date` drop-down menu. After you have selected a start date, click `Search`.

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

Highlighting one of the time slots and selecting `More` will provide the performance data for that time slot.

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

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

To include a trainer and / or a room, use the `Trainer` or `Room` selection icon.

Room and Trainer icons.
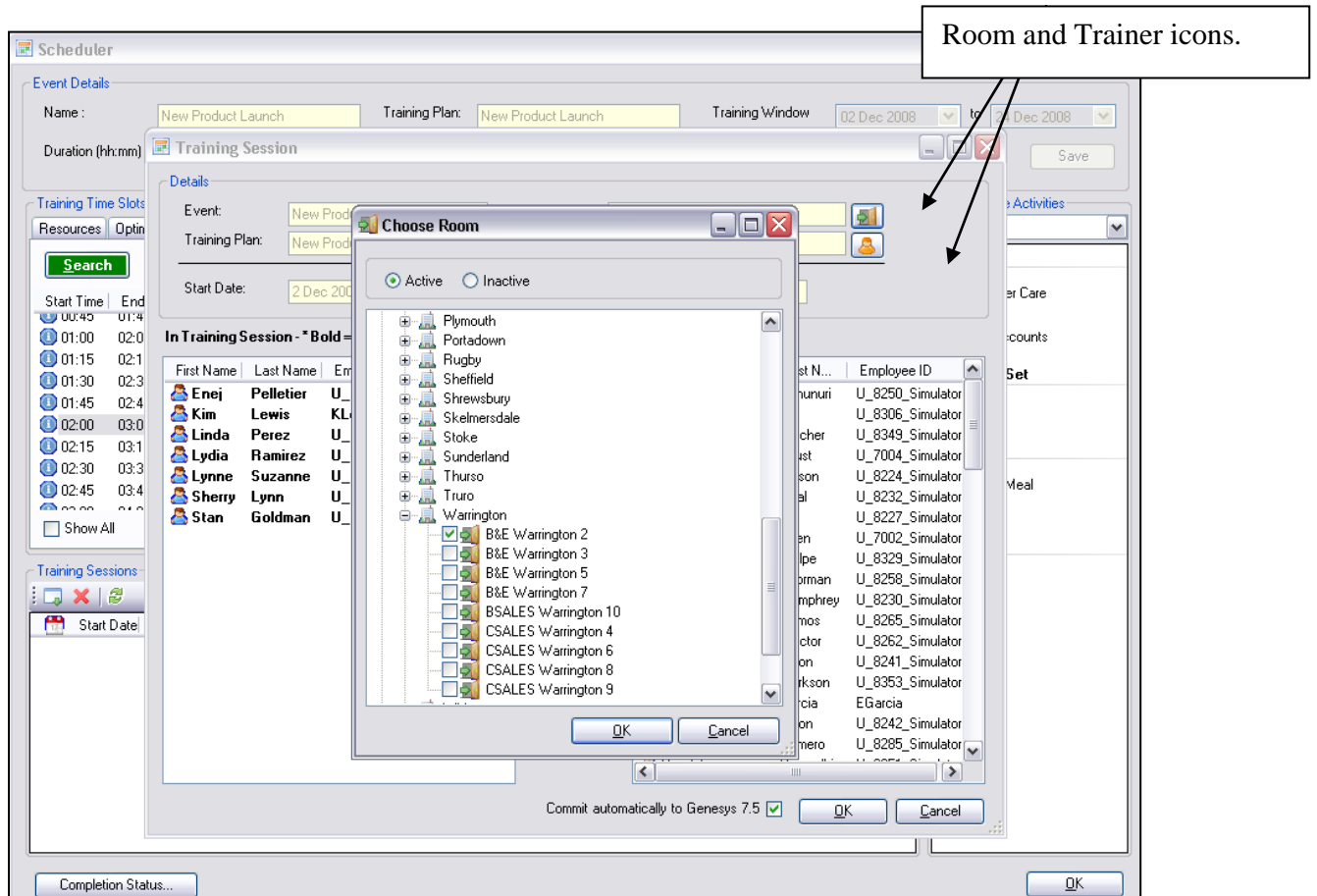
Once the trainer and /or room has been selected, click OK.

Once completed, click OK.

The training session that you created will then be visible in the `Training Session` window.

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

Deleting a Training Request

To delete a training request, any attached information must be disassociated and deleted first. The step-by-step approach must be done in reverse, and only when there is nothing associated with the training request can it be deleted.
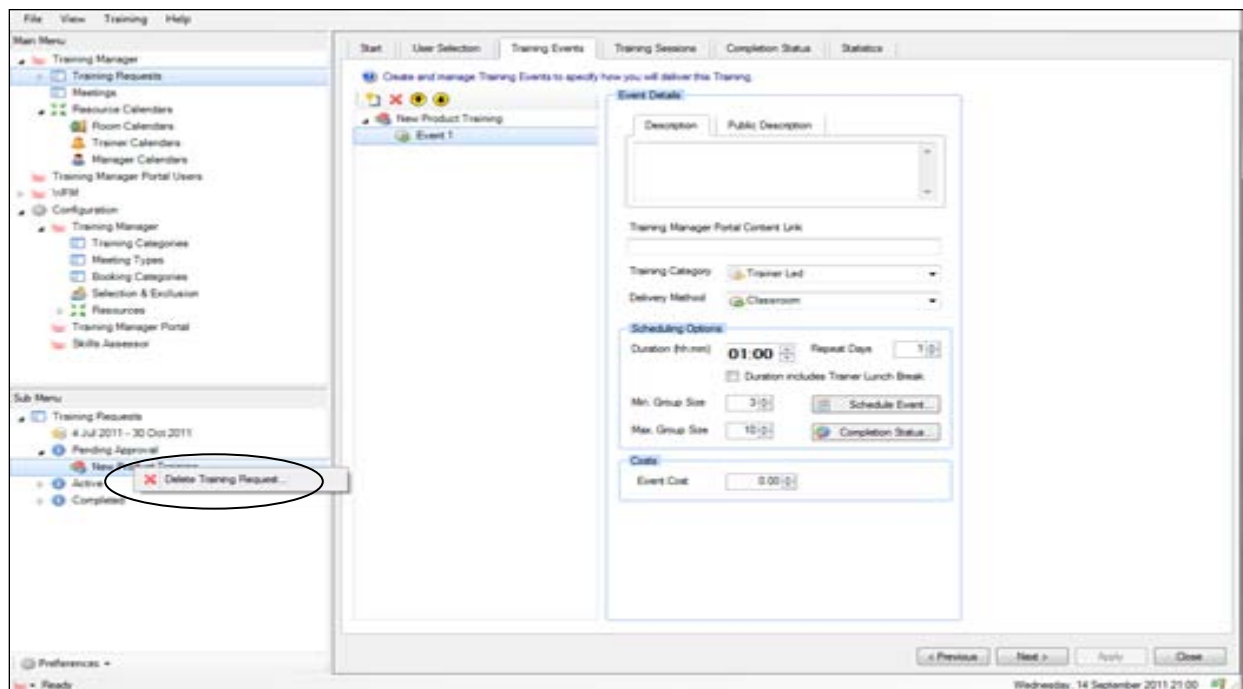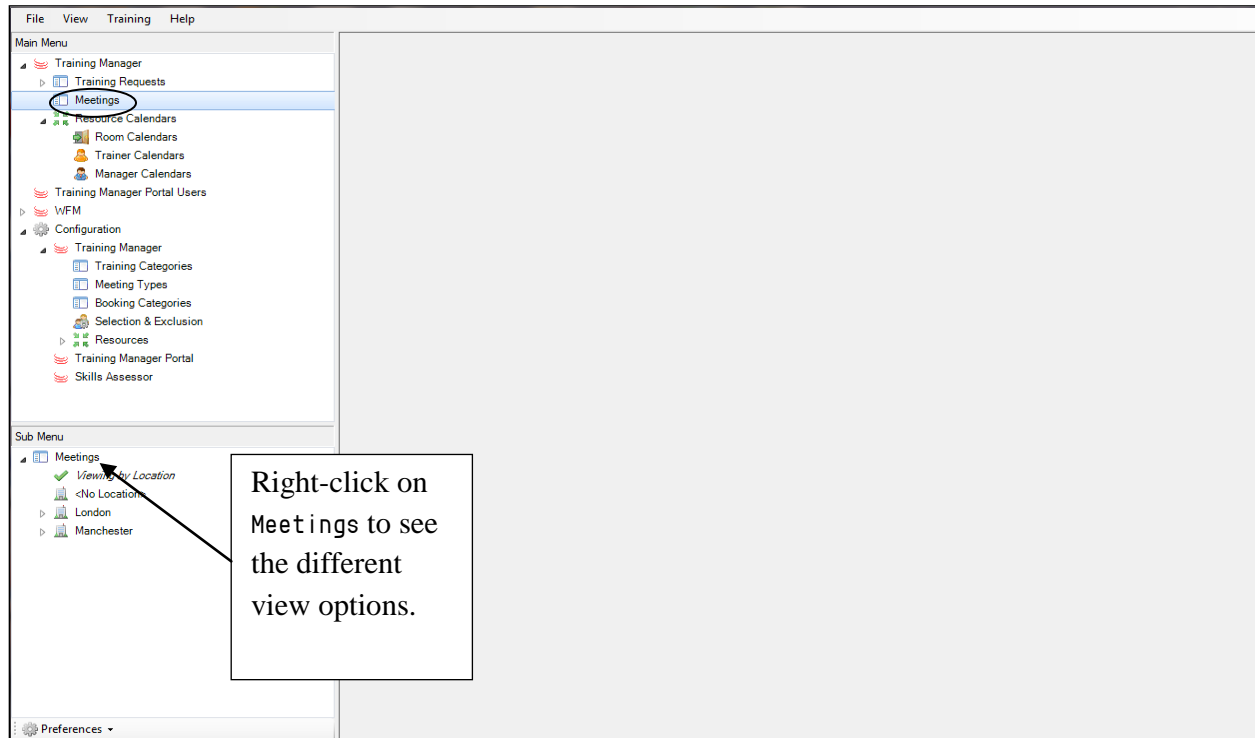
Different view options.
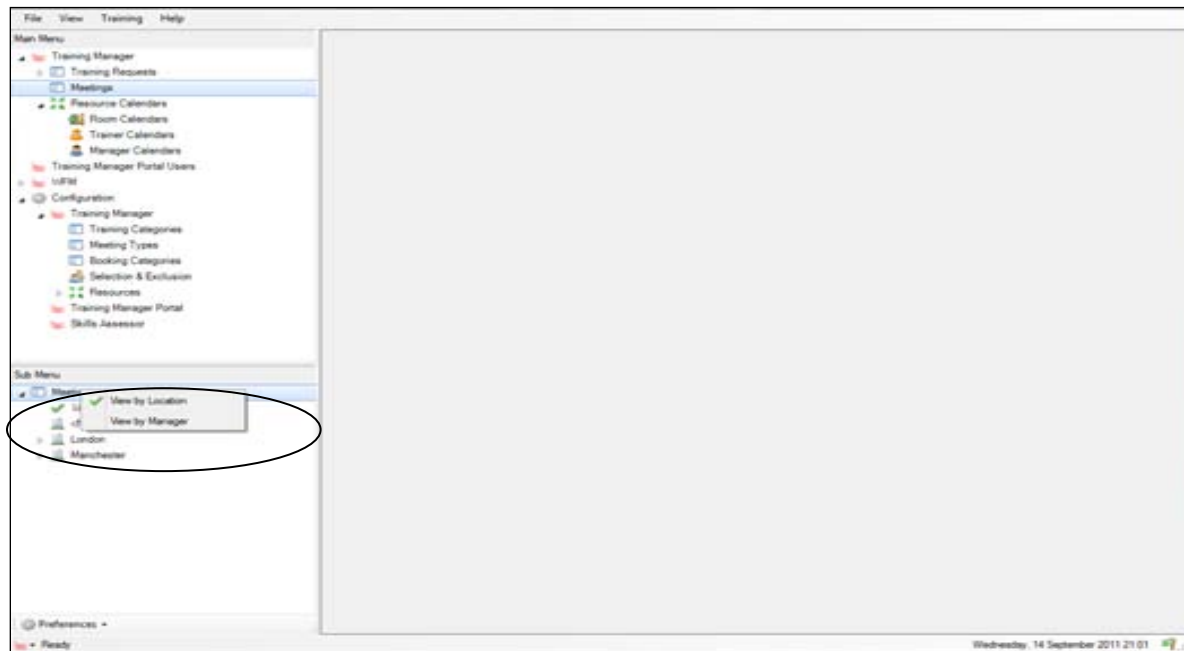
Expand the location to reveal the associated managers.
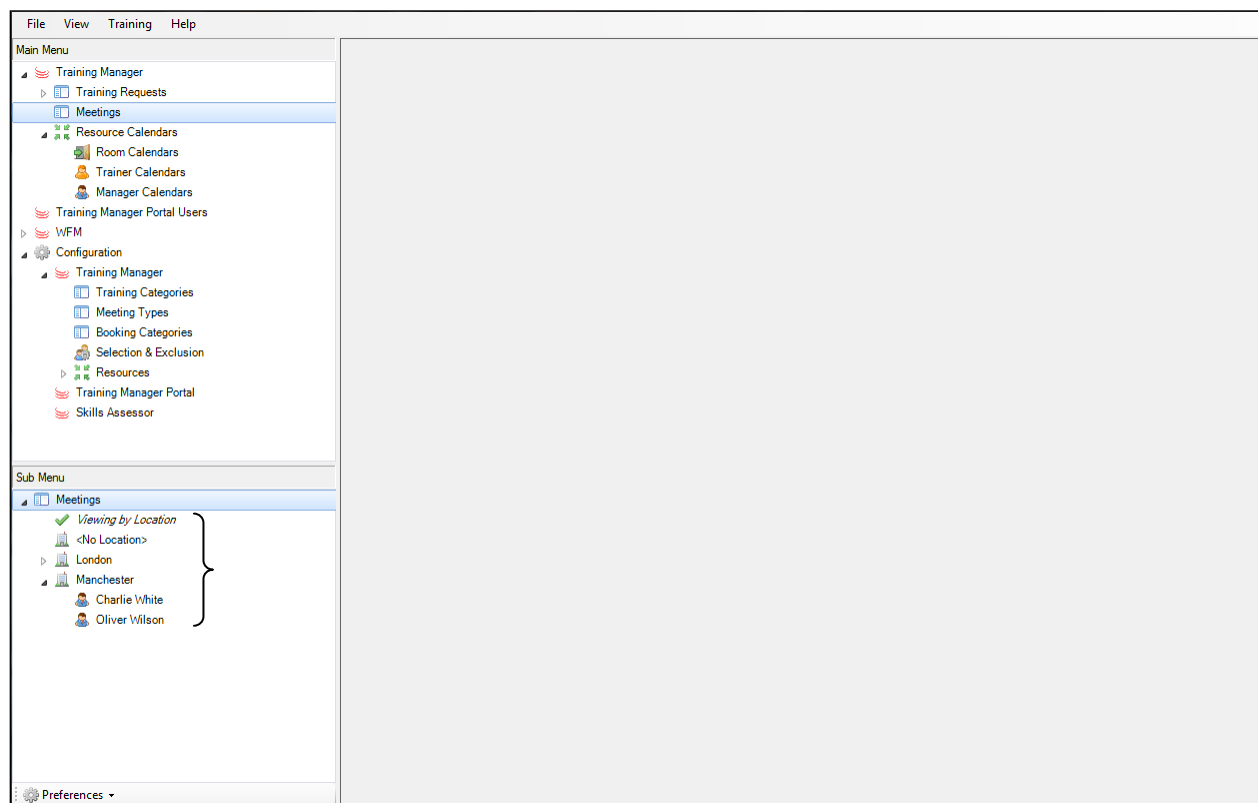
After clicking either the location or a manager, the meeting view will be presented in the `Main Menu` window (once meetings have been scheduled they will appear as a list in this window).

Click `New Meeting` to reveal the step-by-step meeting template (as in the example on the next page, which contains some existing meeting templates.).

Click New Meeting; the step-by-step meeting template appears, with the tabs at the top of the page. In the Start window, complete the relevant sections to create the required meeting.

1. Main Title–This is the meeting title that the manager and team would see against the meeting scheduled in their web portal.

2. Meeting Type–Select the relevant Meeting Type from a drop-down menu. There are three options to select from: Team Meeting, Team Huddle, and One-to-One (Team Meeting and Team Huddle would be selected for group meetings).

3. Description & Objectives–Enter any relevant information about the meeting, as this will also be visible in the web portal against the meeting.

4. Manager–Select which manager to associate with the meeting request.

5. Status–There are three options:

    a. Pending Approval is used for testing purposes where the schedules are not yet confirmed to appear in any web portal views.

    b. Active is used once schedules are confirmed and are required to be visible in web portal views.

    c. Inactive is used so that the meetings no longer appear as active.

6. `Start Date`—By default the meeting window will be set to the current date.

7. `End Date`—The end date can be selected by using the drop-down menu or by clicking the

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

8. Select the earliest start and latest end time that the meeting can happen.

9. Select the meeting duration.

On the `User Selection` tab, select the team that the meeting is being created for.

In this example, `Team 1` has been selected.

The associated location will only appear once the team or individual has been selected.
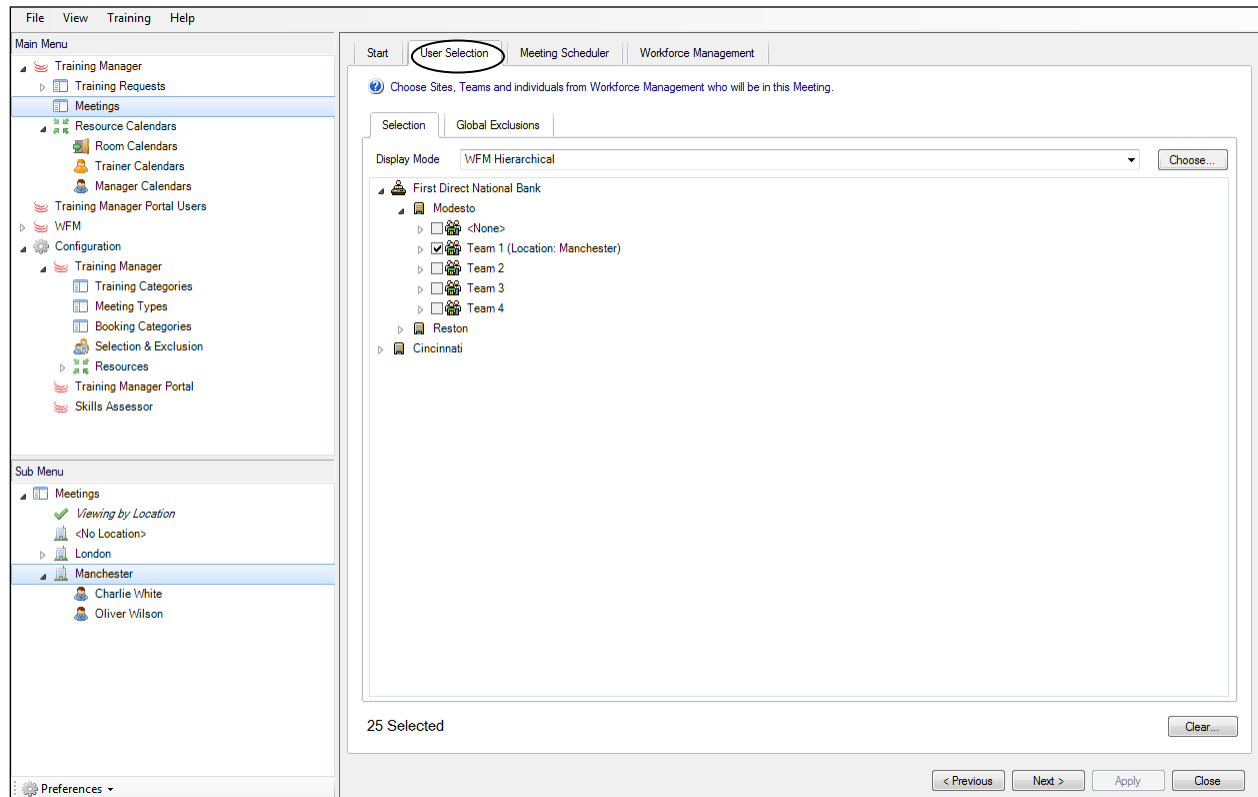
Once the relevant team has been selected, click `Next` or click the `Meeting Scheduler` tab.

The meeting scheduler is where the elements of the meeting are defined.
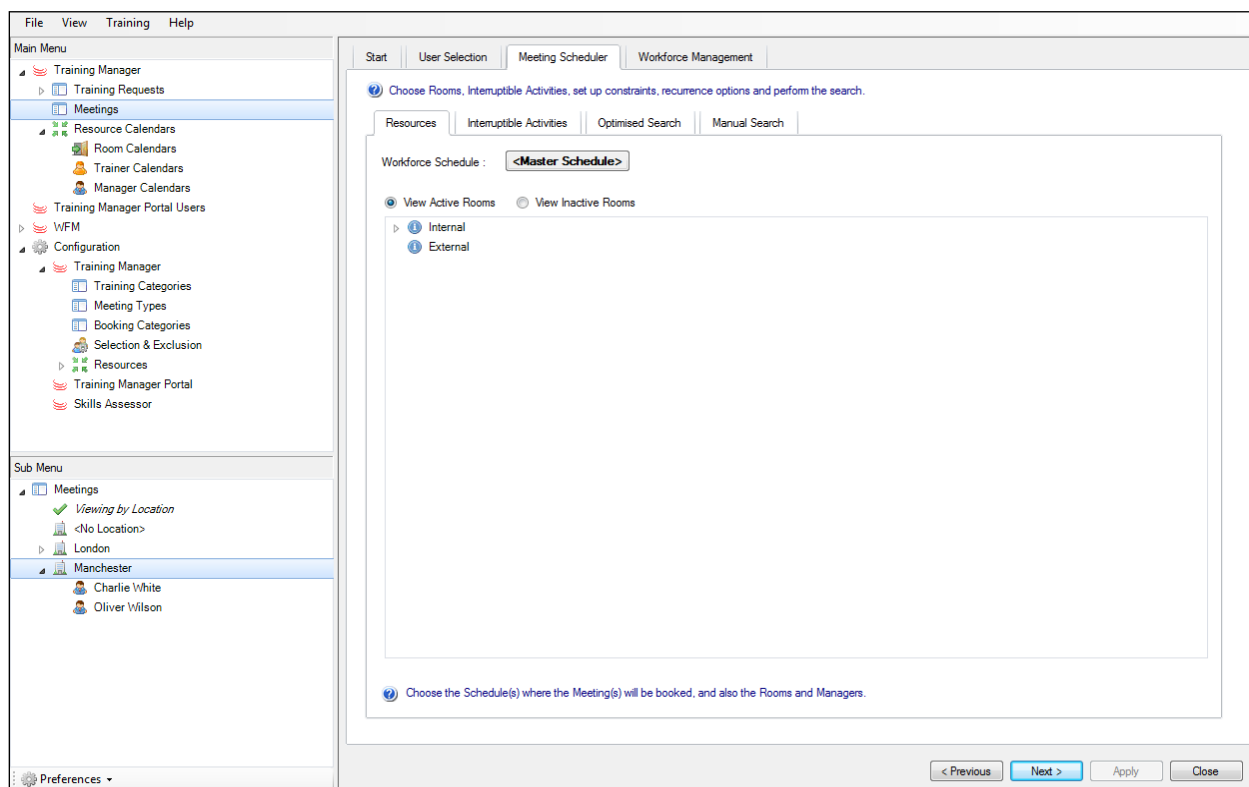
There are four tabs available for completion:

1. `Resources`–Select the required schedule. There is the option to select a room to schedule for the meeting.
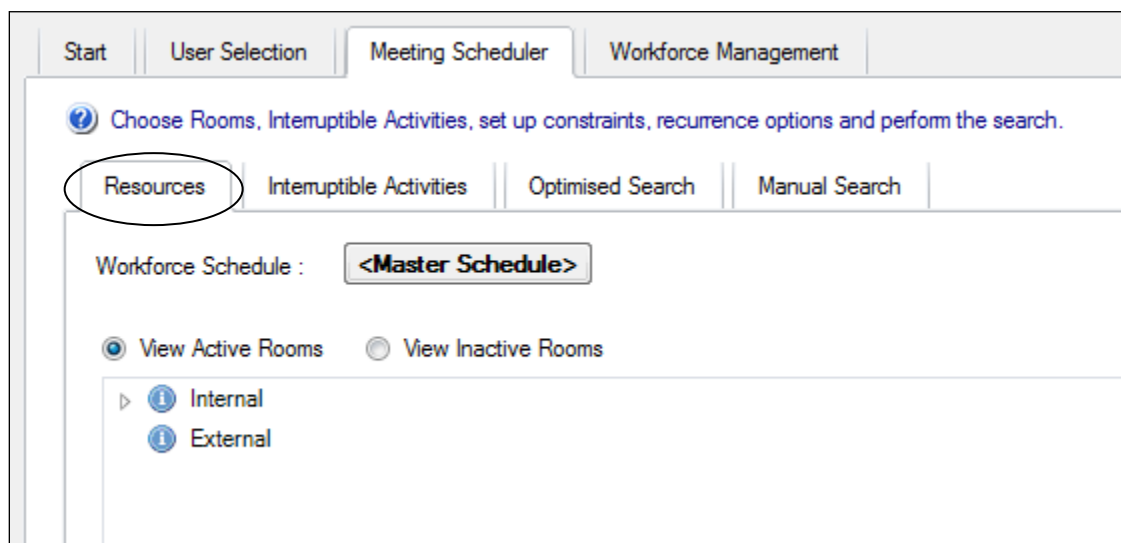
2. `Interruptible Activities`–Select which activities can be interrupted as part of the scheduling process.

3. `Optimised Search`—Select the required constraints as per scheduling training. Under `Recurrence`, select whether the meeting can be `Daily`, `Weekly`, or `Monthly` and on what days the meeting can be scheduled.

There are three recurrence options available, `Daily`, `Weekly`, and `Monthly`:

- `Daily`—A recurrence pattern set to `Daily` will try to book a meeting on each day that is checked (Monday – Sunday) for every week between the `Start Date` and the `End Date`.

- `Weekly`—A recurrence pattern set to `Weekly` will try to book a meeting once a week on any of the days that are checked between the `Start Date` and the `End Date`.

- `Monthly`—A recurrence pattern set to `Monthly` will try to book a meeting once a month on any of the days that are checked between the `Start Date` and the `End Date`.

Within the performance constraints, select the required `Coverage Target` and `Coverage Tolerance`.

Attendance constraints only apply when scheduling a team meeting, as this is the minimum percentage (%) of attendees that the Meeting scheduler can schedule. It will always schedule the maximum number of attendees that it can, based on the performance constraints.

Booking Strategy—Select Front / Random or Back Load as with scheduling training.

Click Search to retrieve fresh data from Genesys WFM.

Select the Workforce Management tab to reveal the suggested meetings.
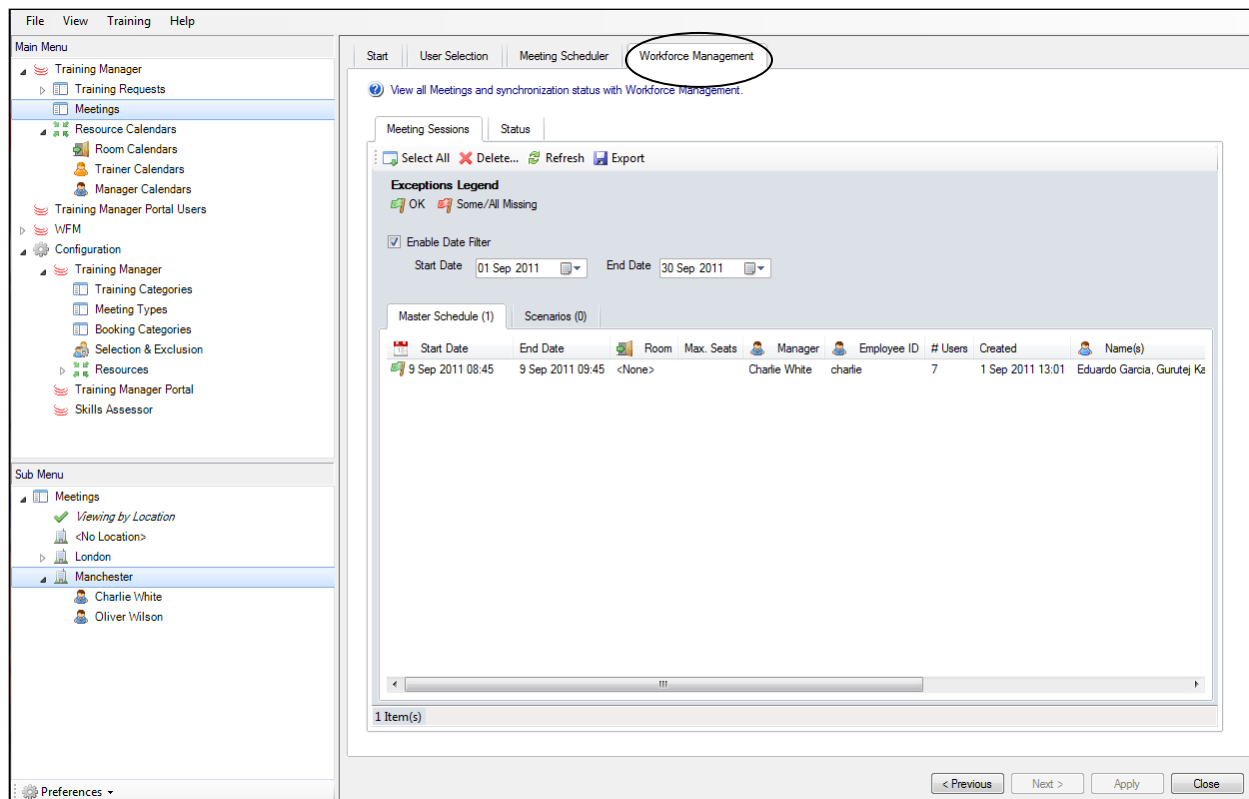
The Master Schedule tab identifies the number of meetings created if Master Schedule has been selected to schedule meetings against.

The red flag indicates that the meeting requests have not been committed to Genesys WFM. To commit the meetings into Genesys WFM, select the meeting sessions and commit them to Genesys WFM as per the training requests.

File	View	Training	Help

Main Menu

- Training Manager
  - ▷ Training Requests
  - **Meetings**
    - Resource Calendars
      - Room Calendars
      - Trainer Calendars
      - Manager Calendars
  - Training Manager Portal Users
  - ▷ WFM
  - ▽ Configuration
    - Training Manager
      - Training Categories
      - Meeting Types
      - Booking Categories
      - Selection & Exclusion
      - ▷ Resources
      - Training Manager Portal
      - Skills Assessor

Sub Menu

- ▲ Meetings
  - ✓ Viewing by Location
  - <No Location>
  - ▷ London
  - ▲ Manchester
    - Charlie White
    - Oliver Wilson

Preferences ▾

| Start	User Selection	Meeting Scheduler	Workforce Management

ⓘ View all Meetings and synchronization status with Workforce Management.

Meeting Sessions	Status

🗹 Select All   ✖ Delete...   🔁 Refresh   📤 Export

Exceptions Legend
OK   Some/All Missing

☑ Enable Date Filter

Start Date [01 Sep 2011 ▾]   End Date [30 Sep 2011 ▾]

Master Schedule (1)	Scenarios (0)

Start Date	End Date	Room	Max. Seats	Manager	Employee ID	# Users	Created	Name(s)
9 Sep 2011 08:45	9 Sep 2011 09:45	<None>		Charlie White	charlie	7	1 Sep 2011 13:01	Eduardo Garcia, Gurutej Ka

1 Item(s)

[< Previous] [Next >] [Apply] [Close]

There is also the option to view the Status of the meeting as per the example below.
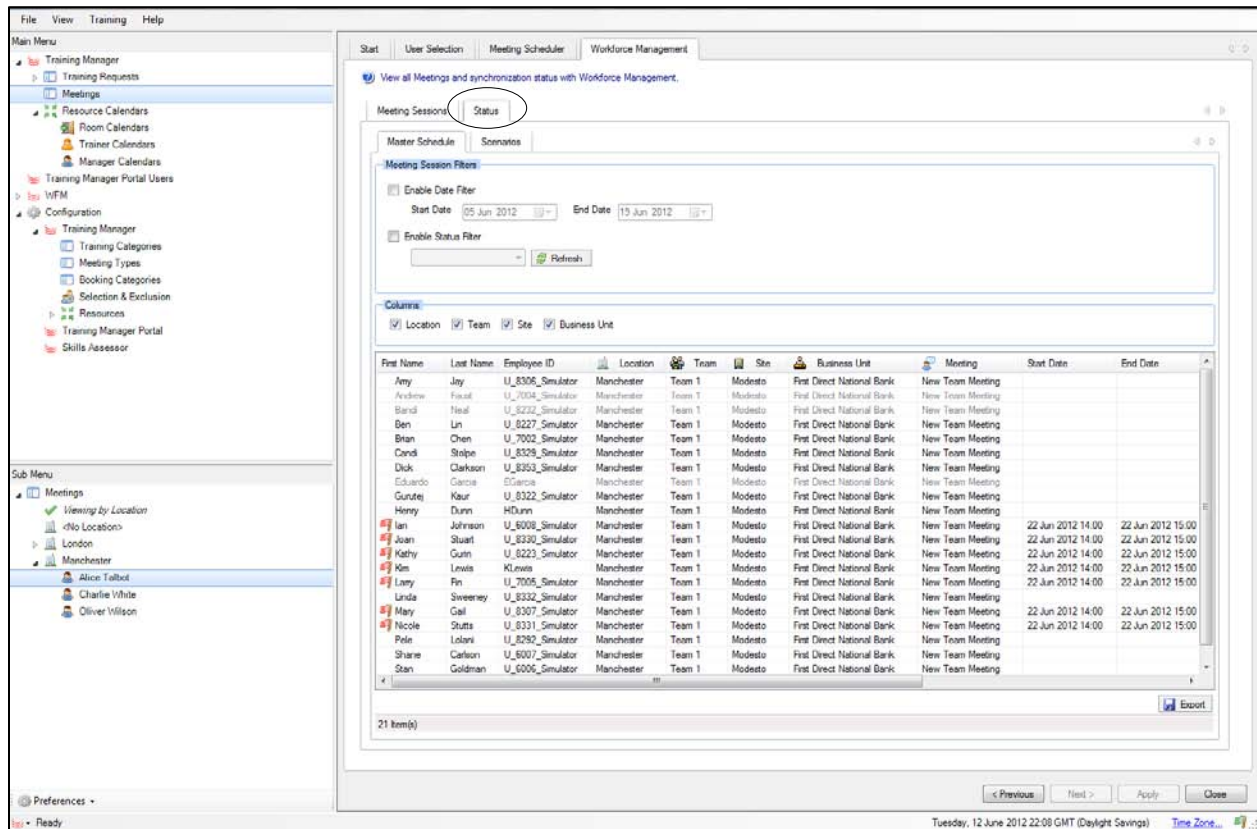
The `Meeting Session Details` and `Performance Data` options are also available, as when creating training sessions.
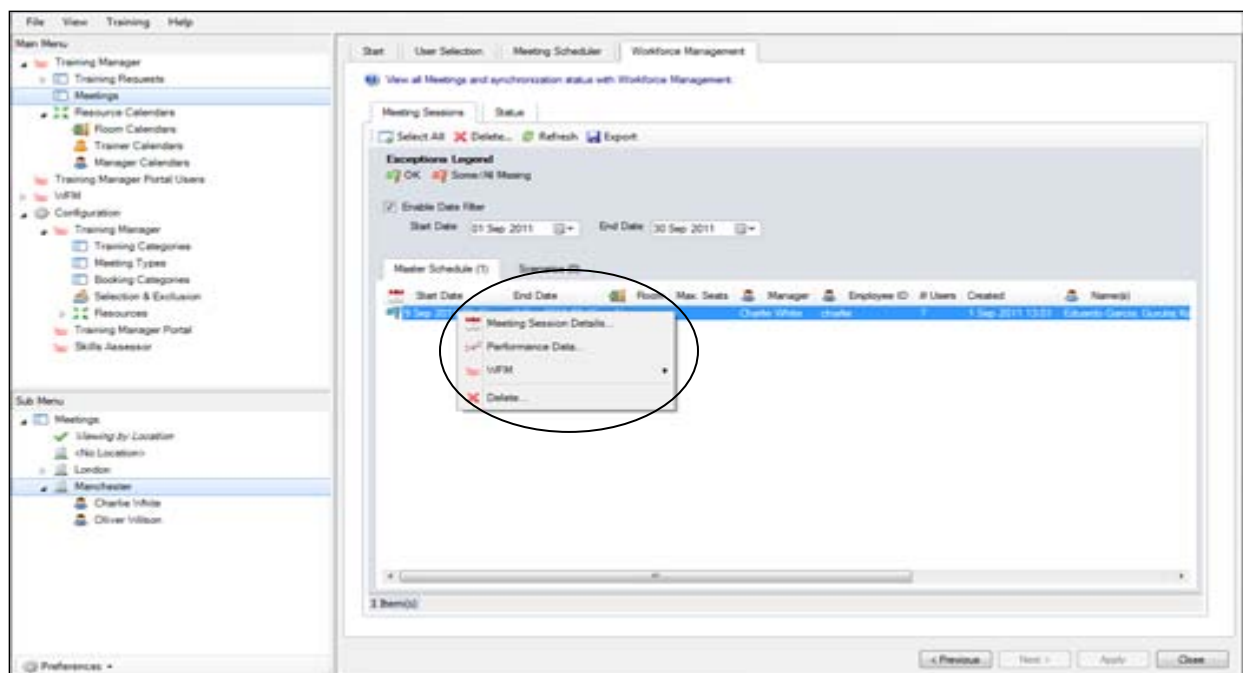
There is also the option to remove the exceptions and keep the meeting sessions that have already been created, rather than removing the exceptions by deleting the meeting or training requests.

Once the sessions have been committed, click Close to close the meeting session template.
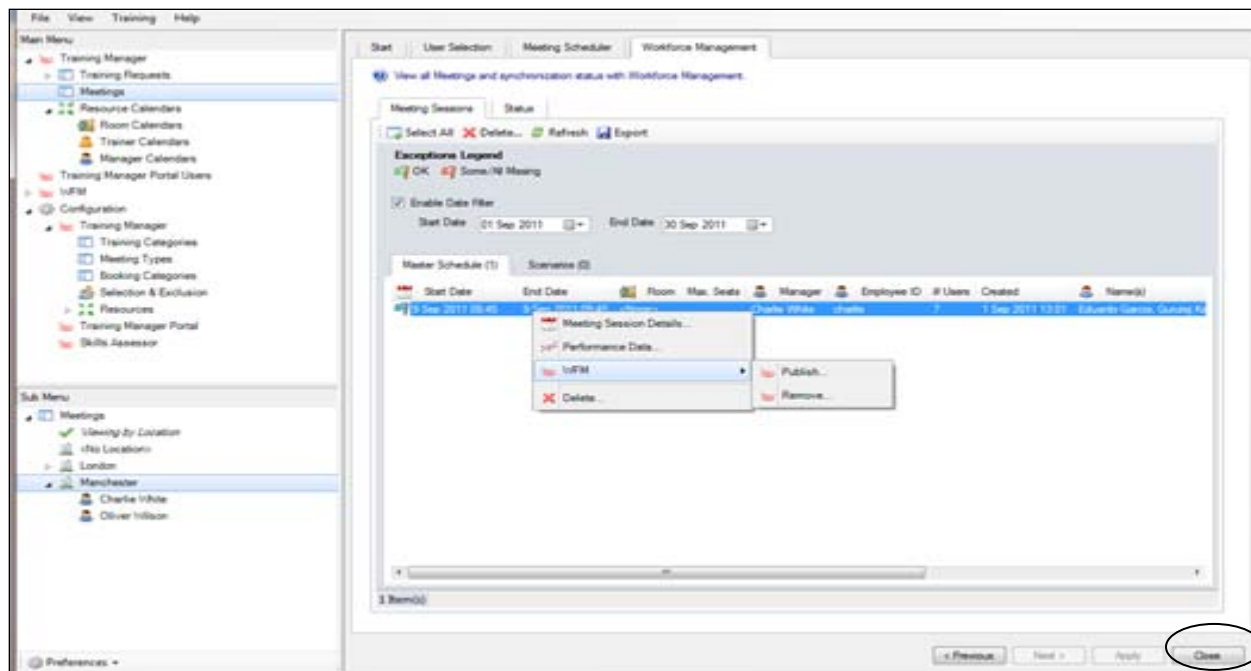
After closing the meeting request template, the meeting session now appears in the Meetings window, as in the example on the next page.

File	View	Training	Help

Main Menu

- Training Manager
  - Training Requests
  - **Meetings**
  - Resource Calendars
    - Room Calendars
    - Trainer Calendars
    - Manager Calendars
  - Training Manager Portal Users
  - WFM
- Configuration
  - Training Manager
    - Training Categories
    - Meeting Types
    - Booking Categories
    - Selection & Exclusion
    - Resources
  - Training Manager Portal
  - Skills Assessor

Sub Menu

- Meetings
  - Viewing by Location
  - <No Location>
  - London
  - Manchester
    - Charlie White
    - Oliver Wilson

Preferences ▾

Meeting Filters

☐ Enable Status Filter [▾]

☐ Enable Type Filter [▾]

☑ Show items needing critical attention [3 ⬍] days warning (Only applies to Meetings with Recurrence)
☑ Show items needing attention soon [10 ⬍] days warning (Only applies to Meetings with Recurrence)
☑ Show items needing no attention

☐ Only show items without Next Dates

🔲 New Meeting   ☑ Check All   ✖ Delete...   ⟳ Refresh   ⚙ Next Dates...   🔲 Optimised Searches...

| Status	Main Title	Type	Status	Manager	Employee ID	Team	Start Date	End Date	Next Start Date	Next End Date	D
☑ ⓘ	New Team Meeting	Team Meeting	Active	Charlie White	charlie	Team 1	1 Sep 2011 08:00	30 Sep 2011 22:00			6I
☐ ⛔	Team Meeting	Team Meeting	Active	Charlie White	charlie	Team 2	1 Sep 2011 08:00	30 Sep 2011 22:00			6I

Export

2 Item(s)

Copying a Scheduled Meeting to Other Teams

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

Right-click the meeting request and select `Duplicate meeting to other Team(s)` from the available menu options.
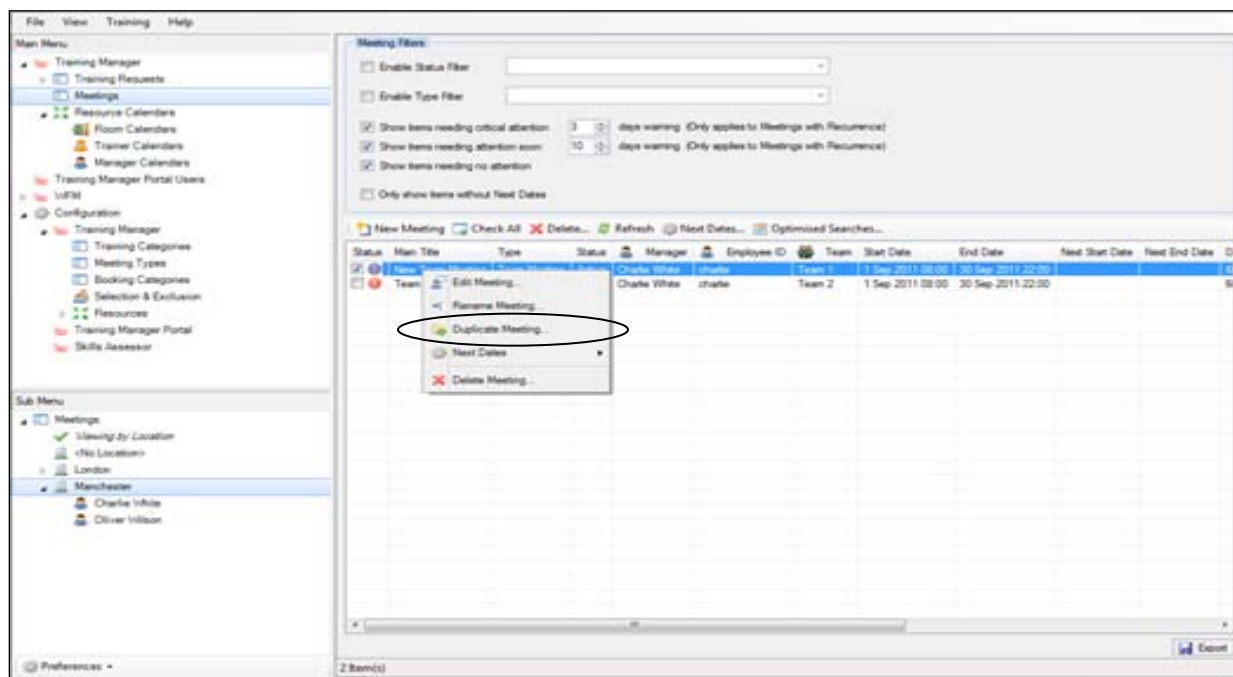

The `Duplicate Meeting` window from WFM appears, allowing you to select from the meetings you want to copy.
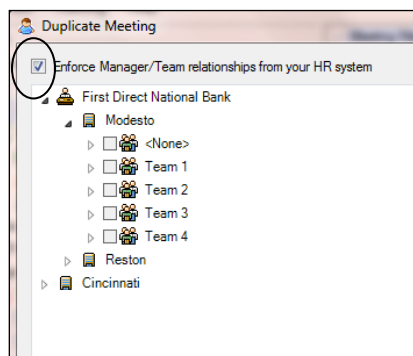
By default, the main title shows as `Copy of Team x Monthly Meeting`.
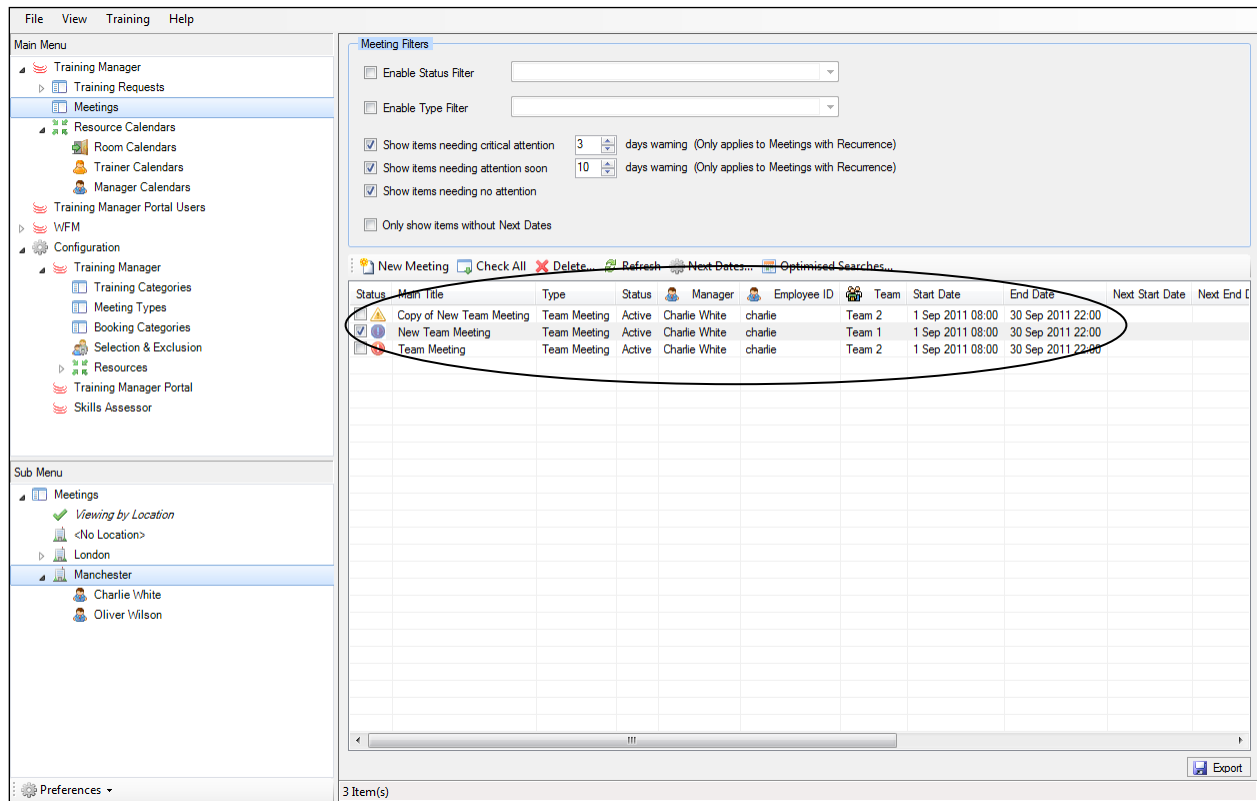
The main title can be changed by either double-clicking the main title team name, or by right-clicking and selecting `Edit Meeting` from the available menu options.
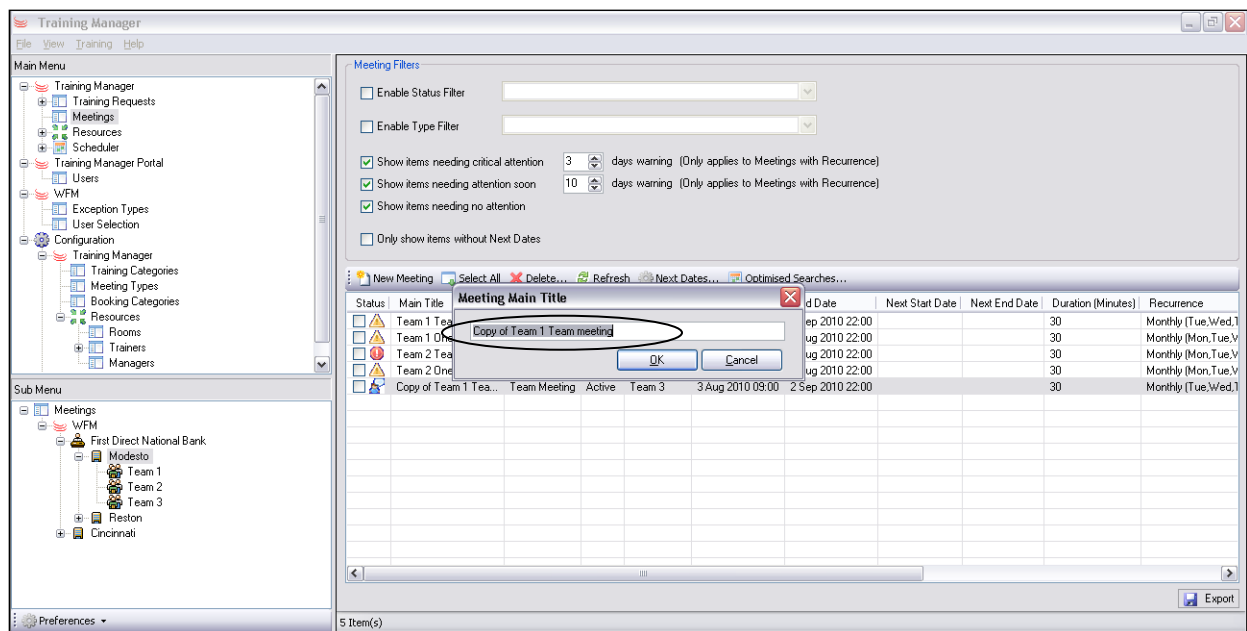
Once the meetings have been created and renamed accordingly, they need to be scheduled. This can be done by first selecting the required meetings by checking the boxes to the left and then selecting `Optimized Searches`.

The `Meeting Scheduler Options` message appears, as in the example below. By leaving `Automatically Publish Exceptions to Genesys WFM for all Meetings` selected, the meetings will be scheduled using the exact criteria specified in the original meeting, and the exceptions will be committed to Genesys WFM.

If the meetings are to be visible in the Web Portal make sure that the status is changed to `Active`.
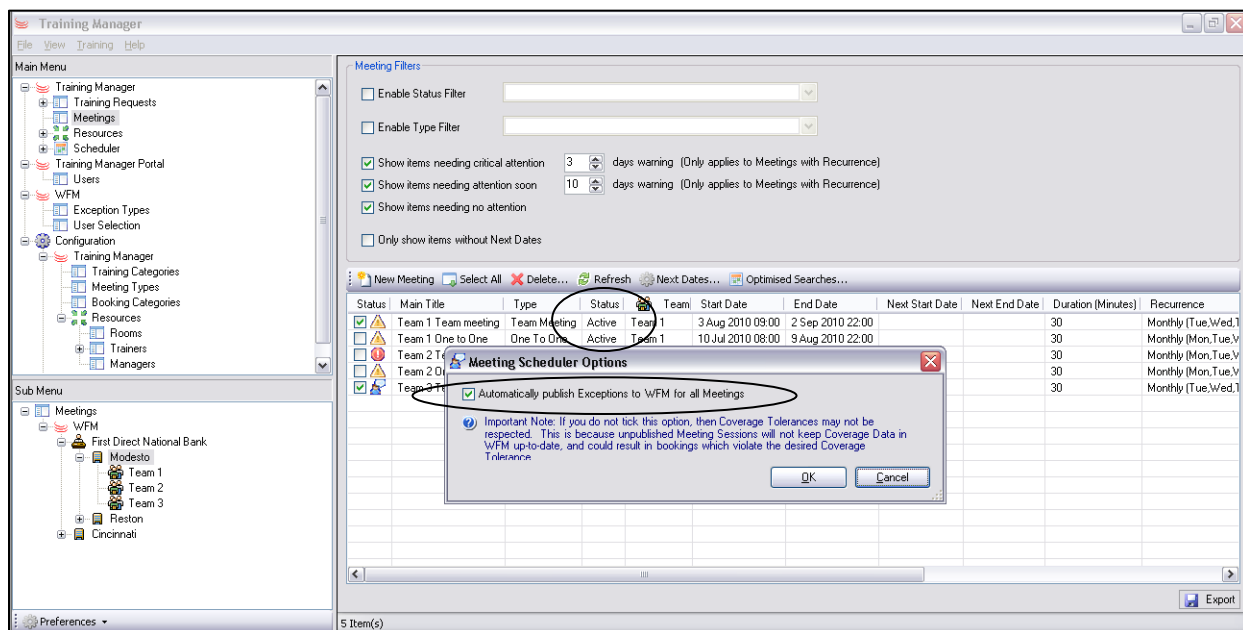
Once the optimized search has been completed the schedules can be viewed by double-clicking the required meeting to reveal the meeting template, and then selecting the `Workforce Management` tab to view the scheduled sessions. As the flags are green, the exceptions will have been committed to Genesys WFM.

To exit the meeting template, click `Close` at the bottom of the window.

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

Within `Tooltip` is an indicator of whether the exceptions are OK in Genesys WFM. If any exception had been altered in WFM, the tooltip changes to identify this.

Group Scheduling of Recurring Meetings

Once the team meetings have been created they can be rolled forward in groups rather than having to create each meeting for the following month individually or manually.

Select the required meeting by checking the boxes to the left, and then click `Next Dates`. The `Meeting Next Dates` message box will appear, as in the example below.

There are three options available:

- `Suggest Next Dates for all selected meetings`—By selecting this option, Genesys Training Manager will roll the dates forward using the date range of the current start and end dates. For example, if the dates are currently for one month, then Genesys Training Manager will suggest dates for one month for the next month.

- `Clear suggested Dates for all Meetings`—This will clear any next dates created.

- `Apply Next Dates for all selected Meetings`—This will update the start and end dates with the next suggested meeting dates by replacing the current dates with the new dates.

To create the next period meetings, select `Suggest Next Dates for all selected Meetings`, and then click `OK`.
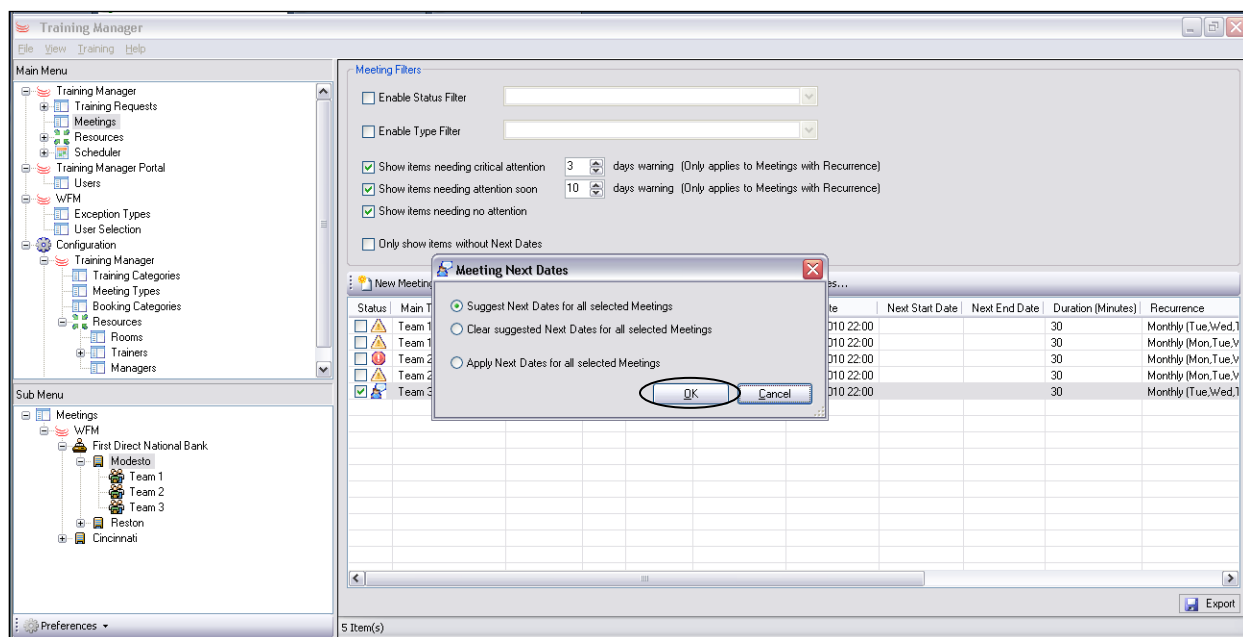
The new suggested dates will then appear under `Next Start Date` and `Next End Date`.
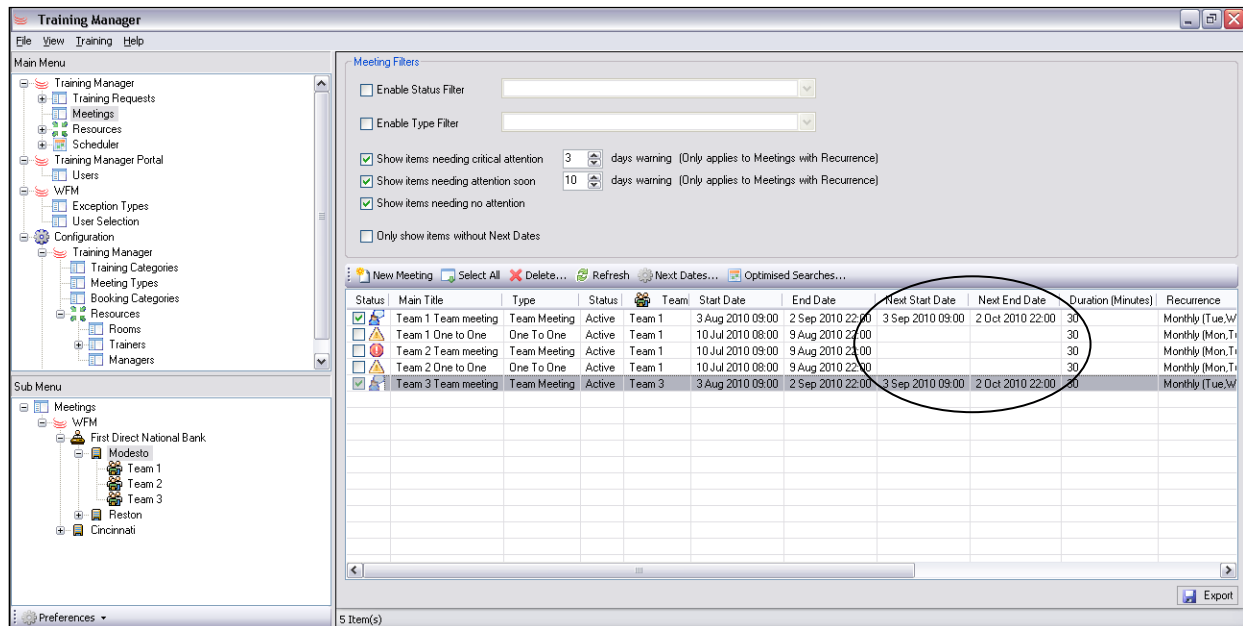
If the meeting dates suggested are correct, select `Next Date` again, and then select the option `Apply Next Dates for all selected Meetings`.
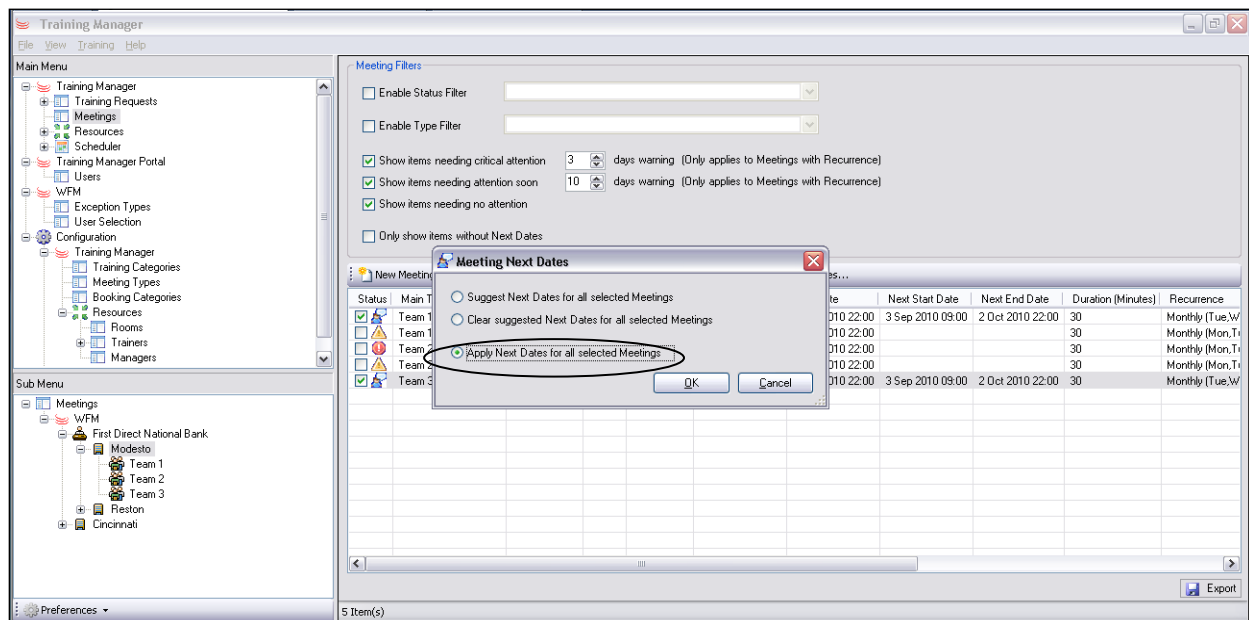
The new dates will now replace the previous dates under `Start Date` and `End Date`.
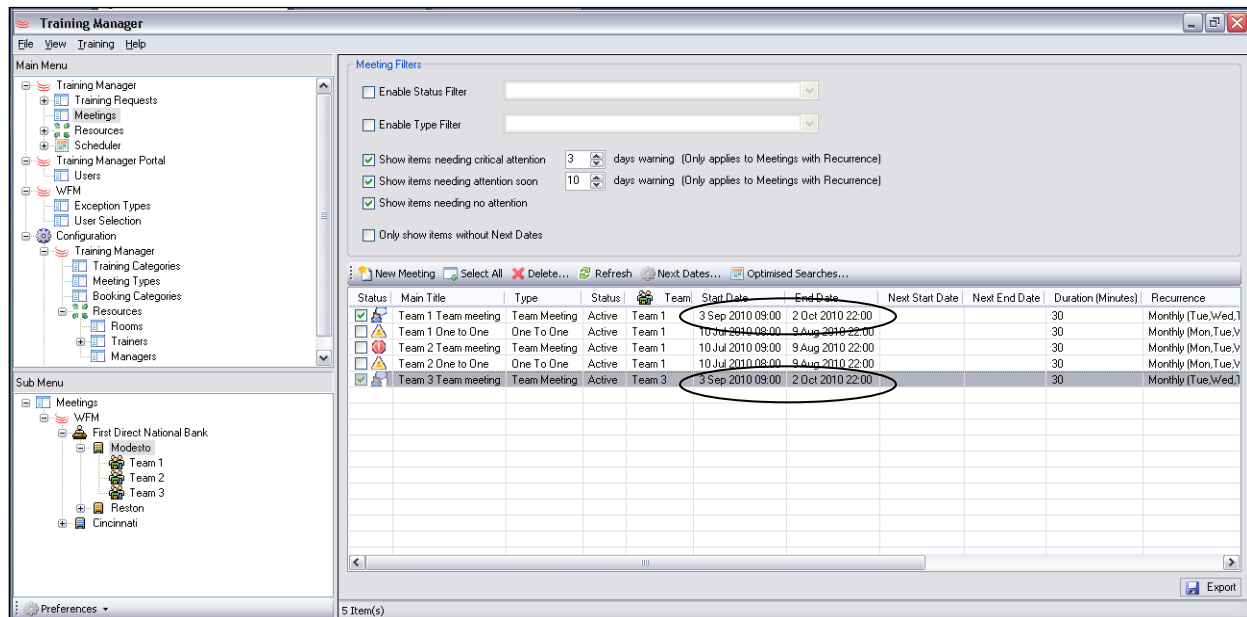
Once the dates have been updated, click `Optimized Searches` and Genesys Training Manager will use all of the criteria in the meeting request templates to schedule the meetings as required.

Checking `Automatically Publish Exceptions to Genesys WFM for all Meetings` will publish the exceptions to WFM, and by having the status as `Active`, the meeting sessions will appear in the manager and agent's web portals.
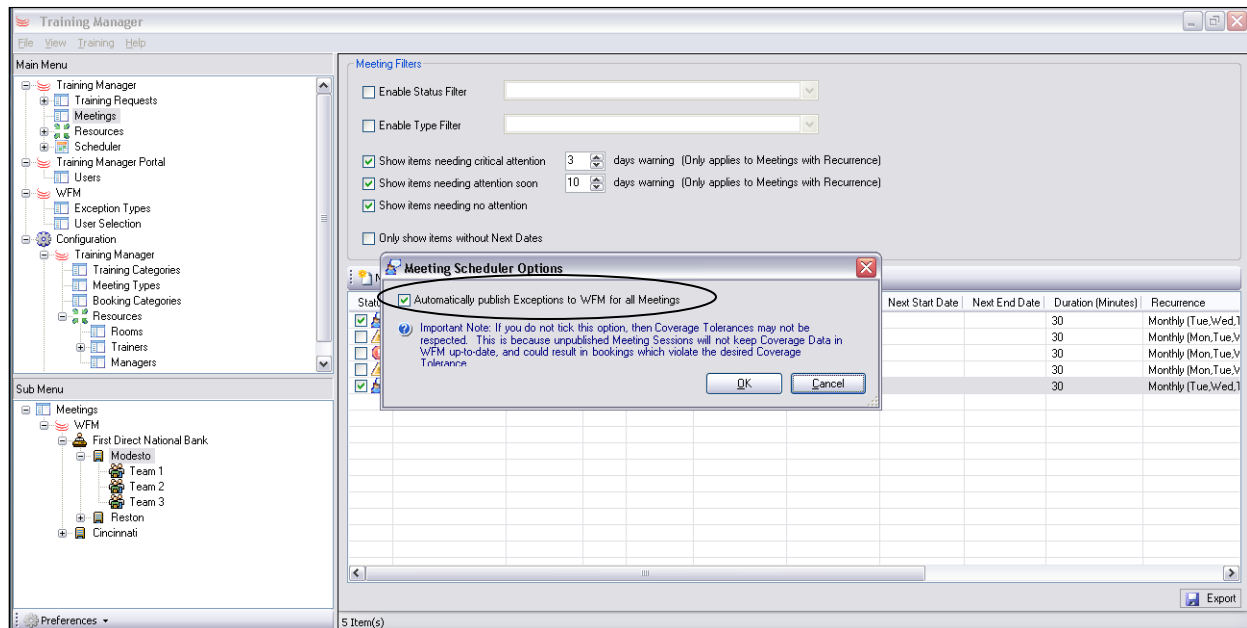
There are filter options available on the `Meeting Filters` screen to reduce the number of meetings visible and to serve as reminders:

- **·** `Enable Status Filter`–Meetings can be viewed based on the status, for example, `Pending Approval`.

- **·** `Enable Type Filter`–This is based on meeting type, for example, `Team Meeting`, `Team Huddle`, or `One-to-One`.

The `days warning` filters are used where the currently scheduled meeting is within x days of the end date, and the meeting is recurring and needs to be scheduled for the following month. This allows only those meetings that need attention to be visible.

Creating Meetings Manually

To create a meeting manually, select `Manual Search` from the `Meeting Scheduler` tab.
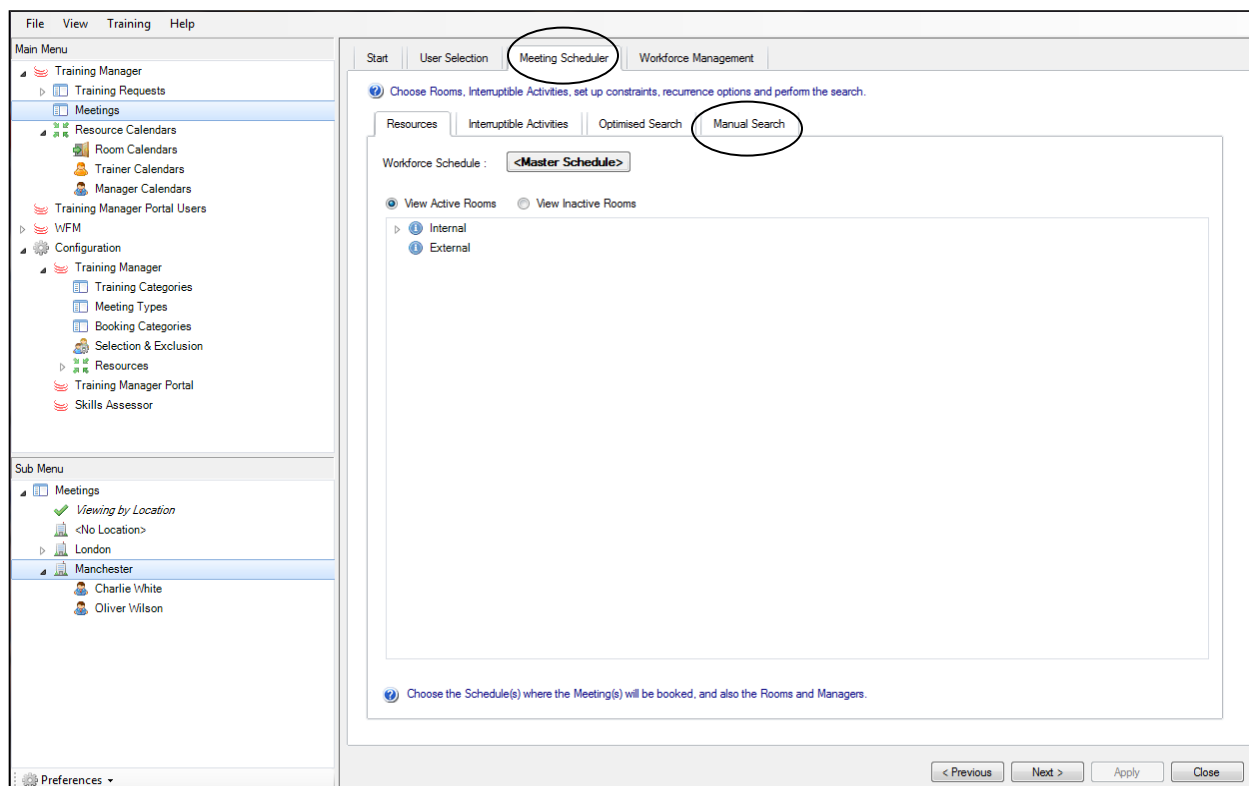
After selecting the date, click `Search` to reveal the number of available agents by time slot.
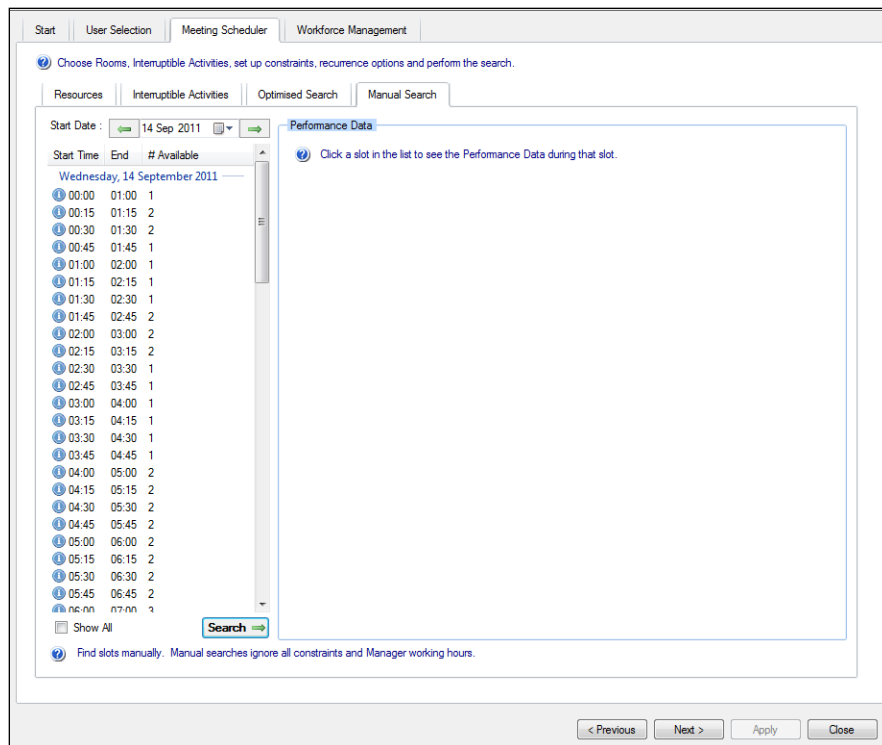
Clicking the required slot reveals the performance data in the right-hand window, as in the example below.
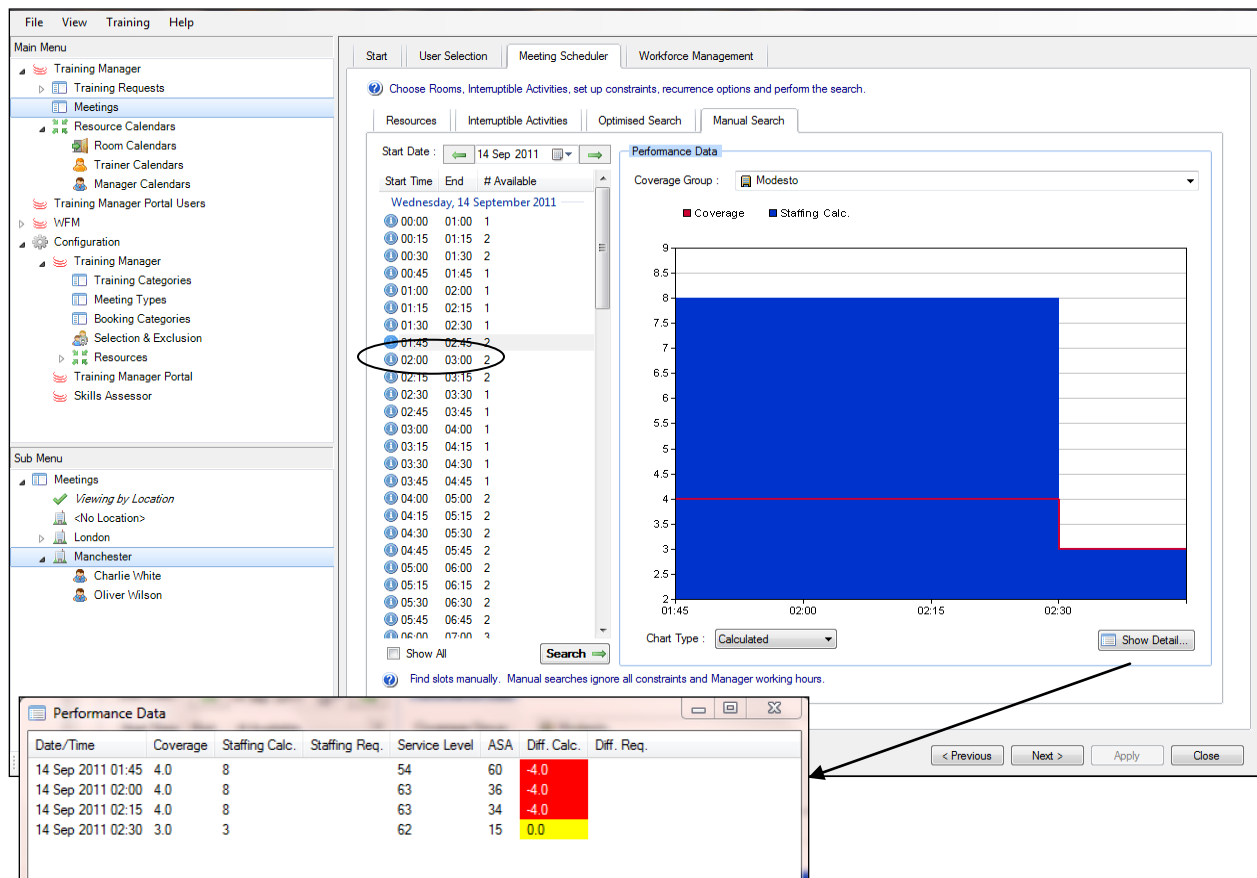
Double-click the time slot to view a meeting session window similar to the meeting below. Click `OK` to create a manual meeting session.

The option to select a manager will appear. After selecting the manager, click `OK`. A meeting session will appear in the `Workforce Management` tab.

Clicking `Status` displays the scheduled meeting activity in report format for the users selected.

Training Request Start Date Filter

A training start date filter is available as an option underneath `Training Requests`.
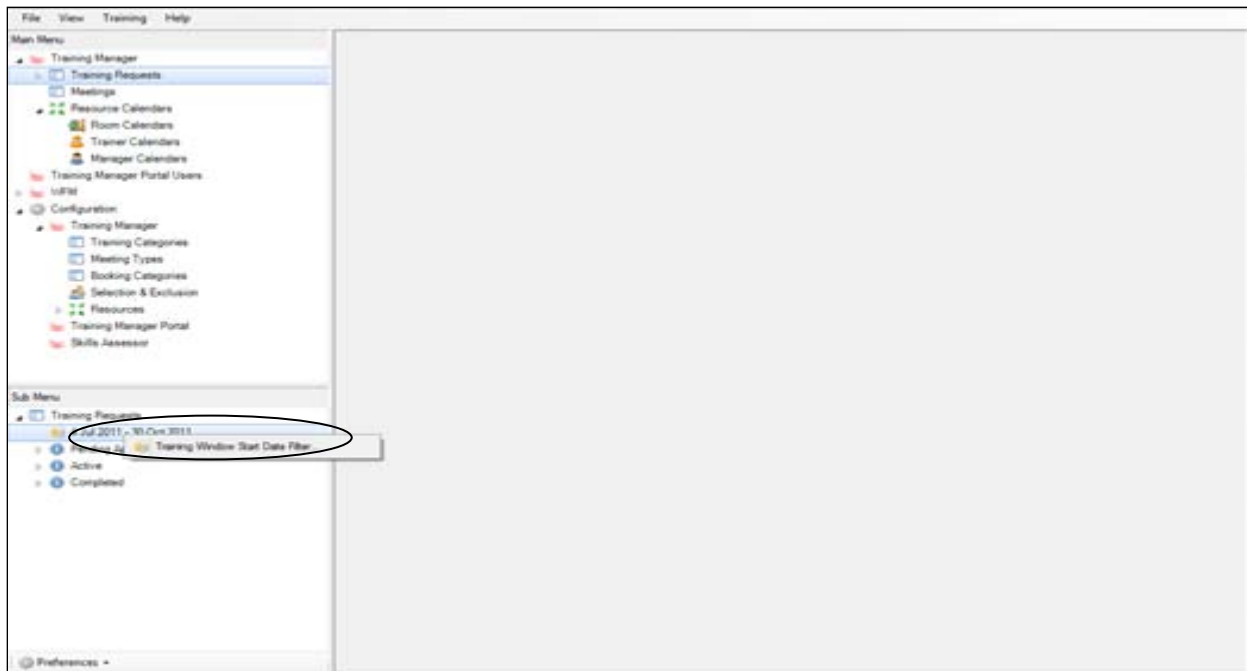
Right-click the date filter; the option to open the training window filter appears, as in the example below.

Enter the required start date range and then click OK.

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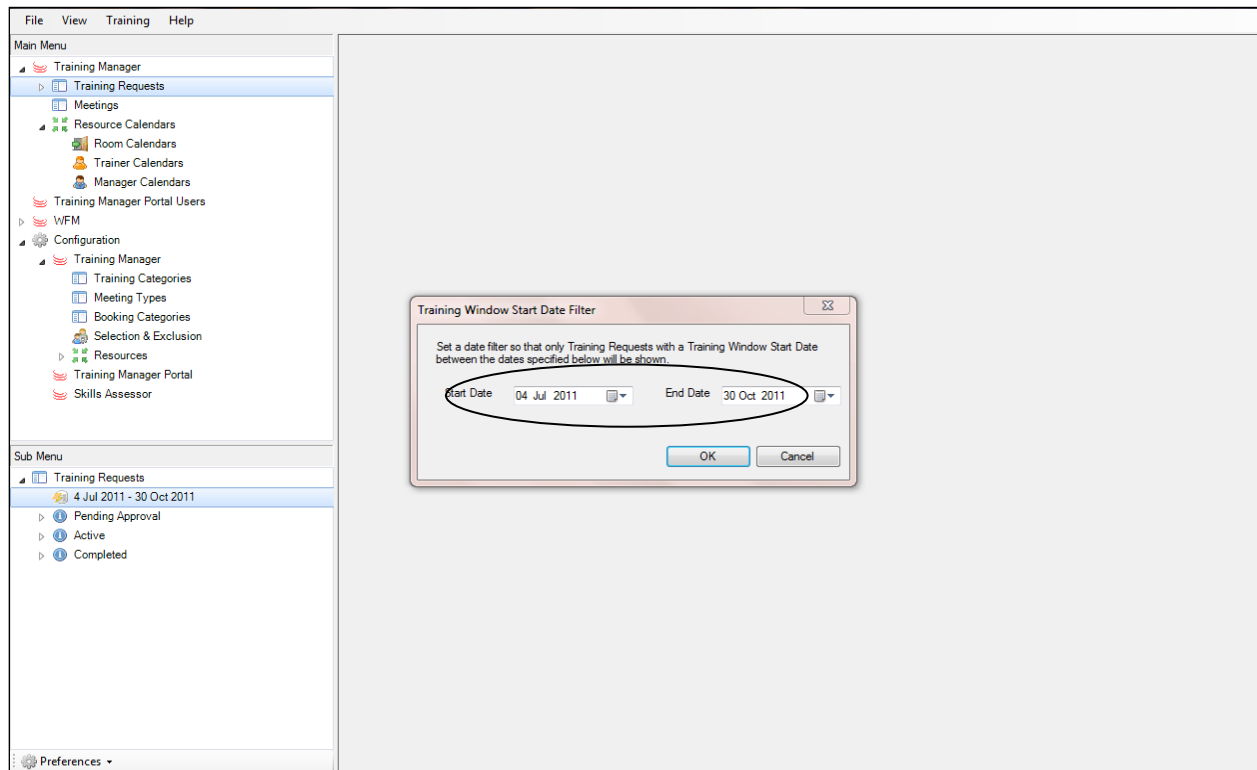
Team Based Scheduling

When scheduling training activity that requires the teams to be scheduled together create the training request as normal up to the Training Events tab as per the example below.

Select `Keep team together` and the `Optimised Search Algorithm` will keep the team members together.
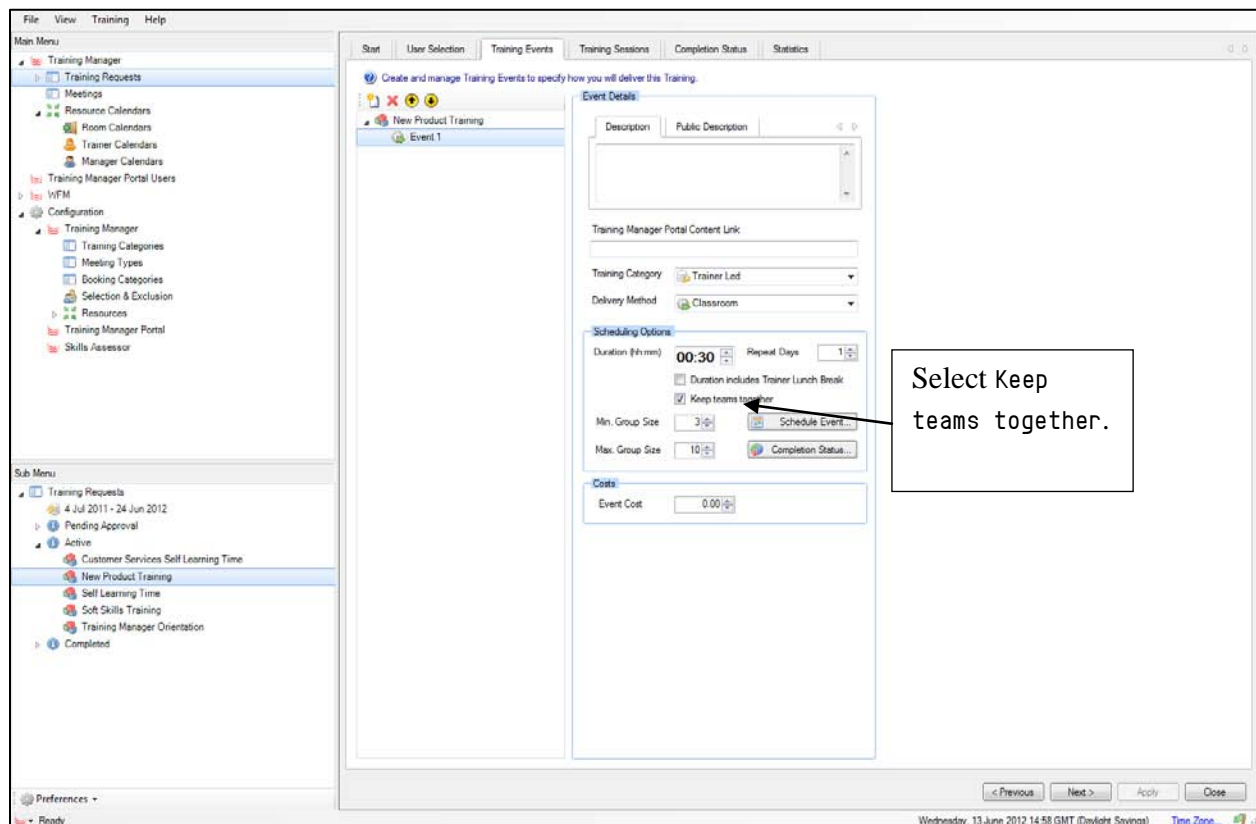
This will also be visible in the Scheduling Options tab.
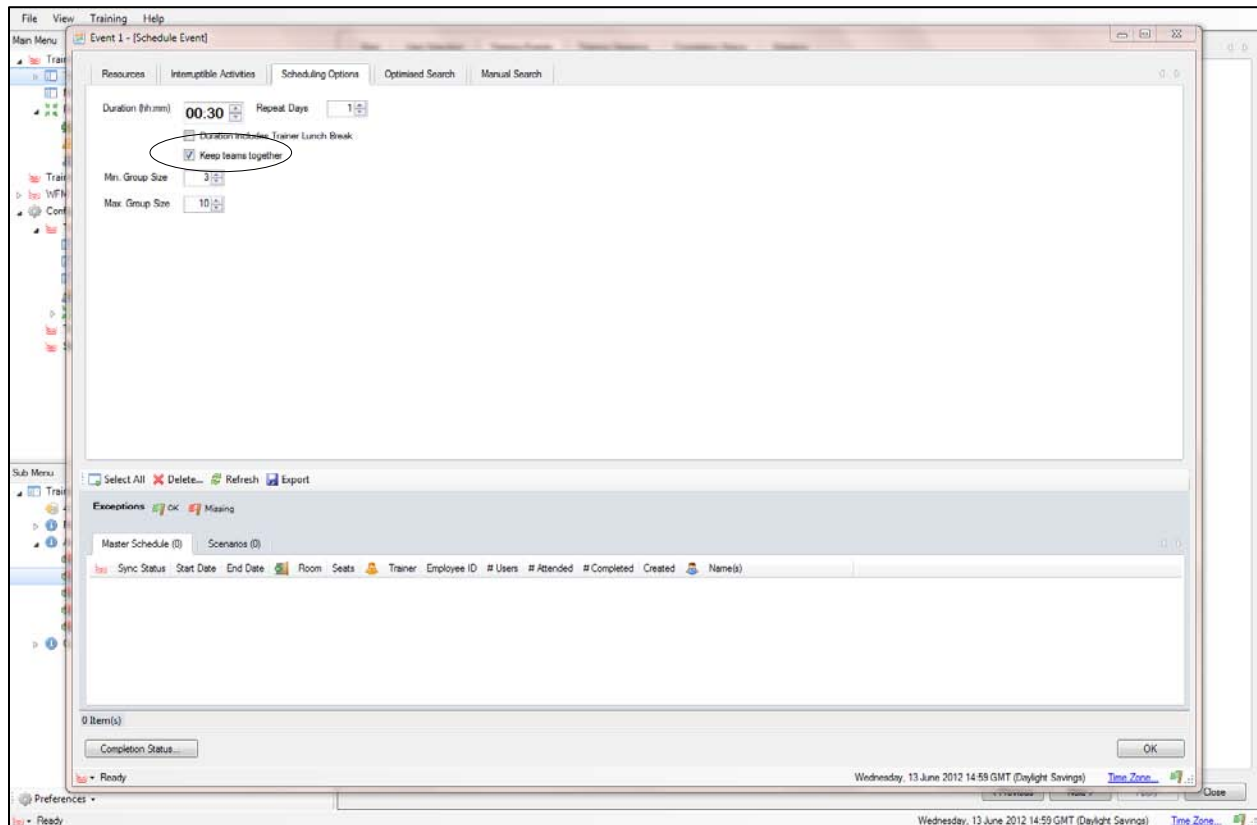
Training sessions will be created around the minimum and maximum numbers of delegates required. View the training session details to confirm that the teams have been scheduled together as required. See the example on the next page.

In this example only Team 1 members have been scheduled for this training session.
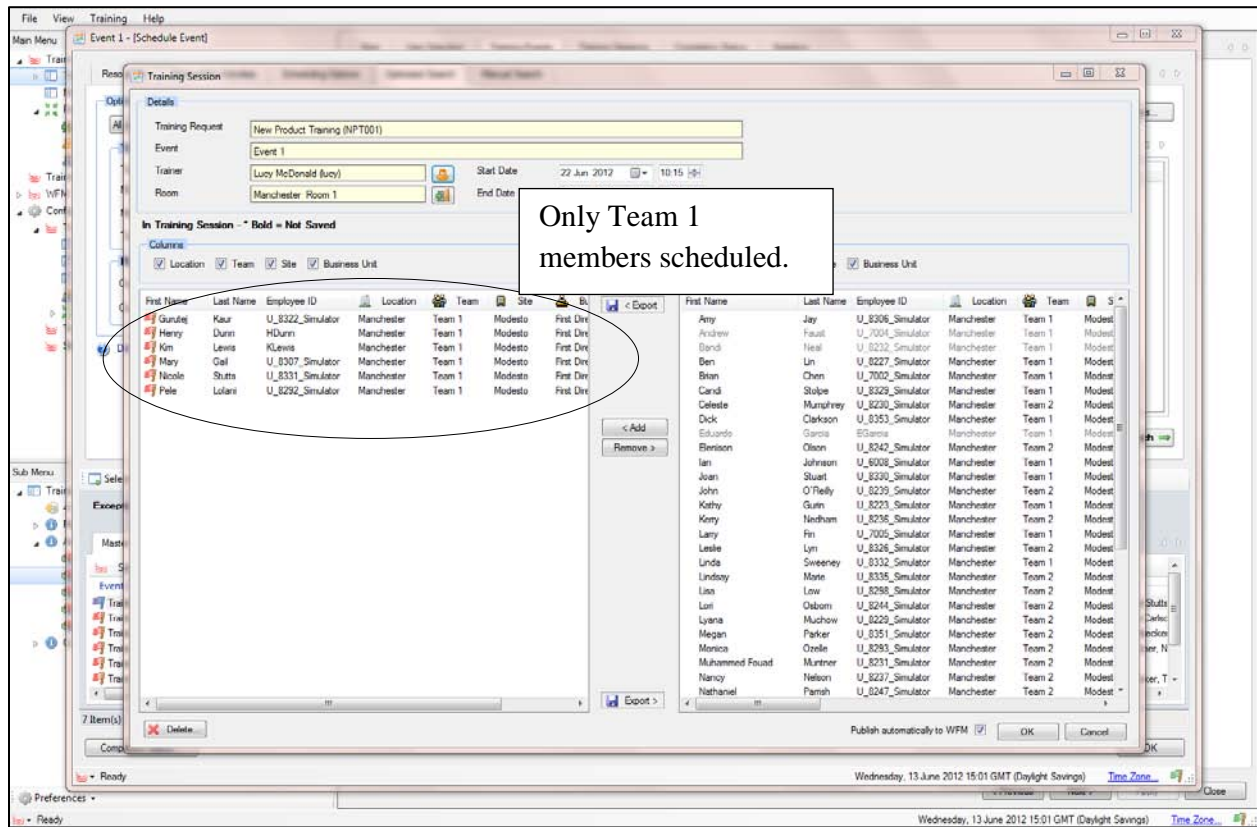
Schedule Sessions into Calendar

Schedule the training using a scenario and the training sessions will appear as per the example below. The icon to the left of the training session indicates that the training sessions are not calendar items in WFM.
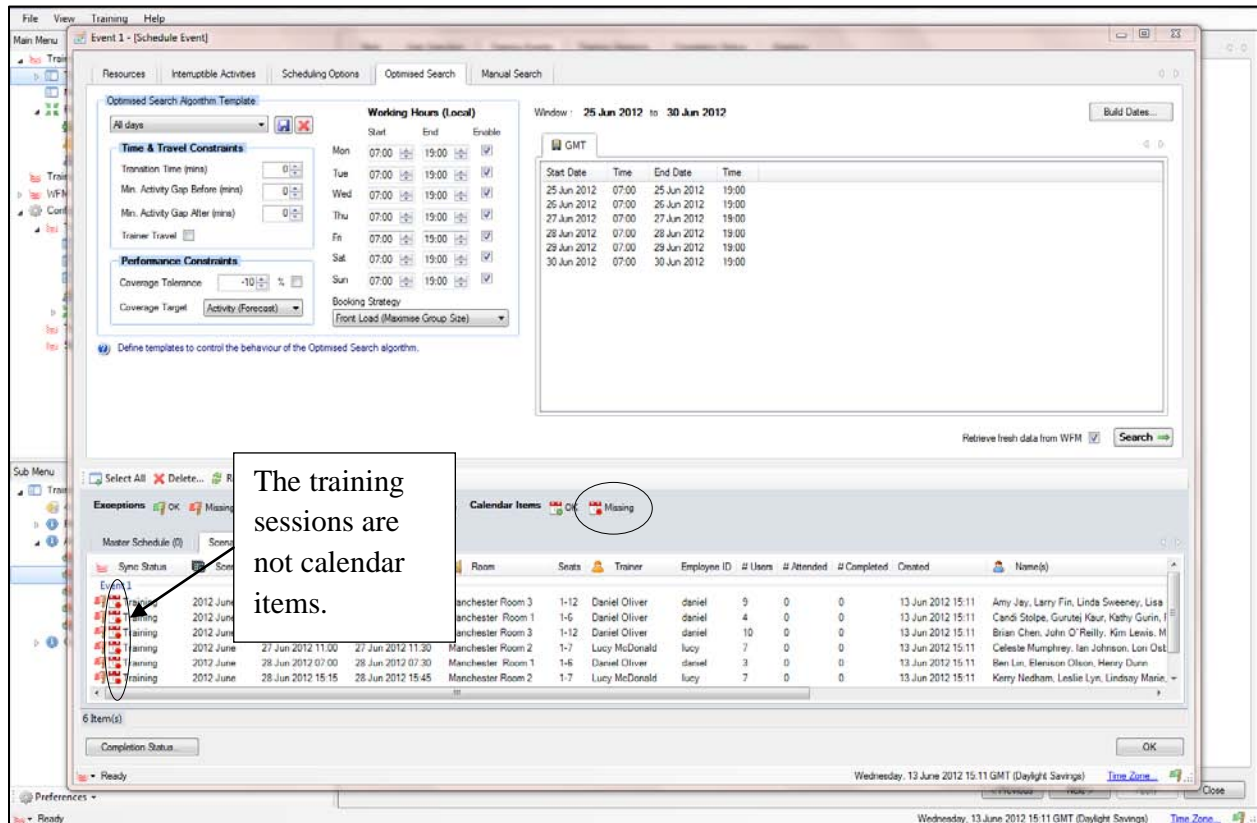
To insert the items into either the WFM Scenario, Calendar or both, right-click on the training sessions and select WFM > Publish as per the example below.
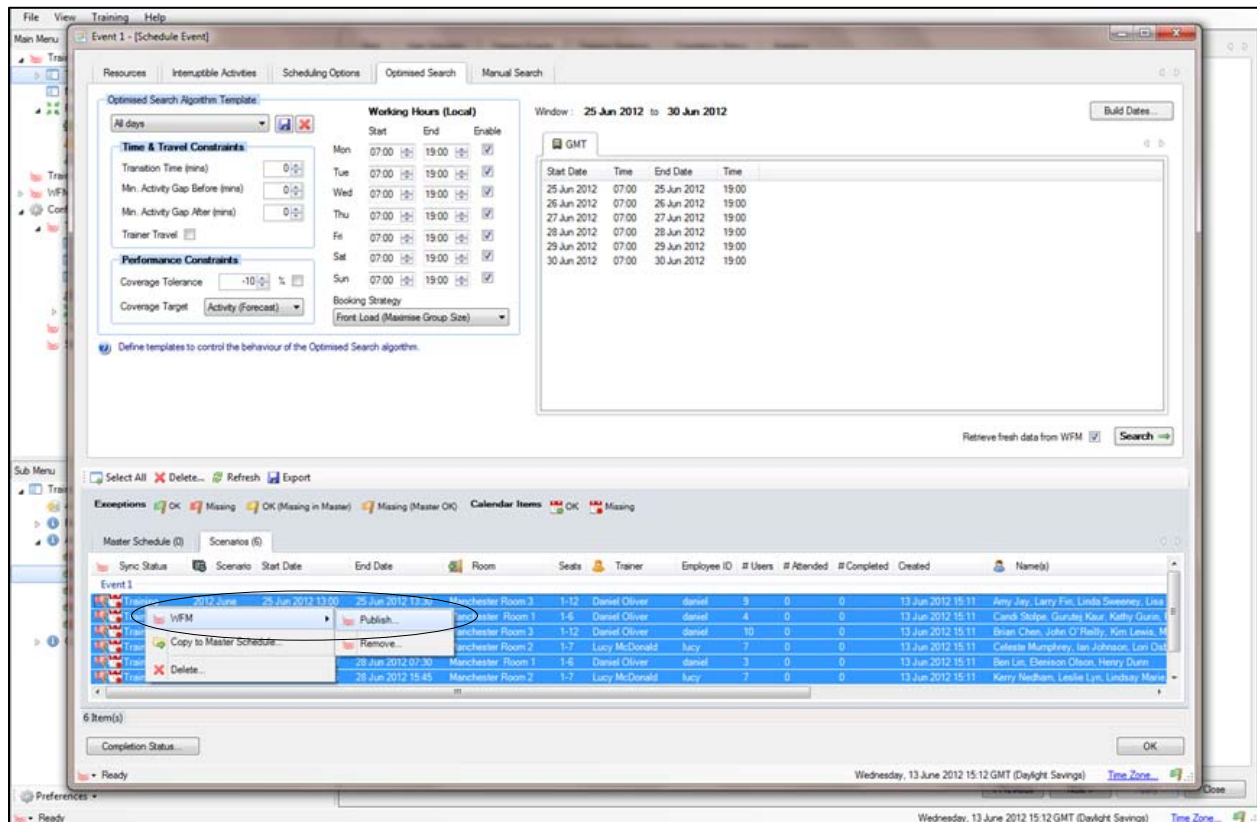
After selecting `Publish`, four options will be presented:

- `Exceptions`—Publish the exceptions in the WFM scenario.

- `Calendar Items`—Publish the training exceptions in the WFM calendar for the individual agents.

- `Both`—Publish the exceptions into the scenario and calendar.

- `Cancel`—Cancel the transaction.
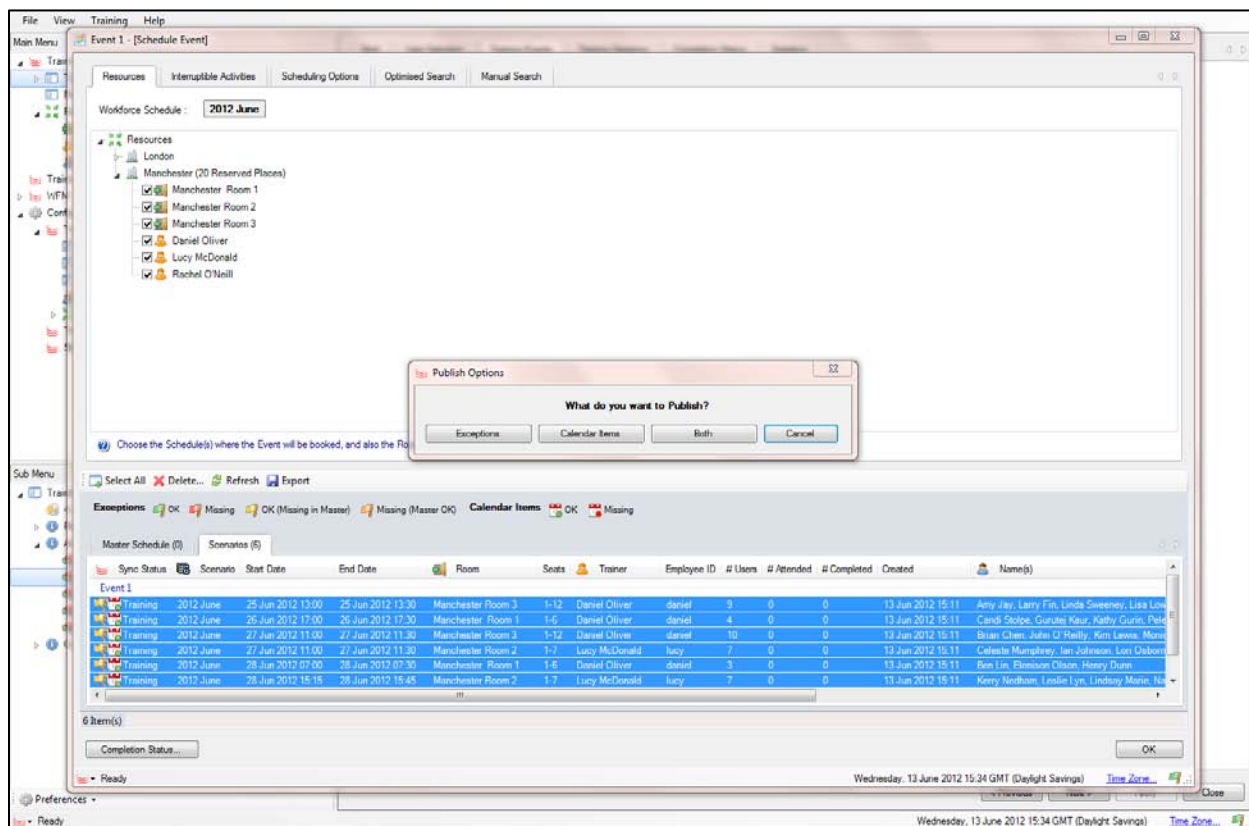
In this example the exceptions have been copied into the WFM scenario and into the calendar, and the icon to the left of the session has been updated.

Deleting the training sessions will remove the training sessions from the scenario and the calendar.

The training sessions then need to be copied into the Planner Master Schedule. Therefore, select all of the sessions and `Copy to Master Schedule`.
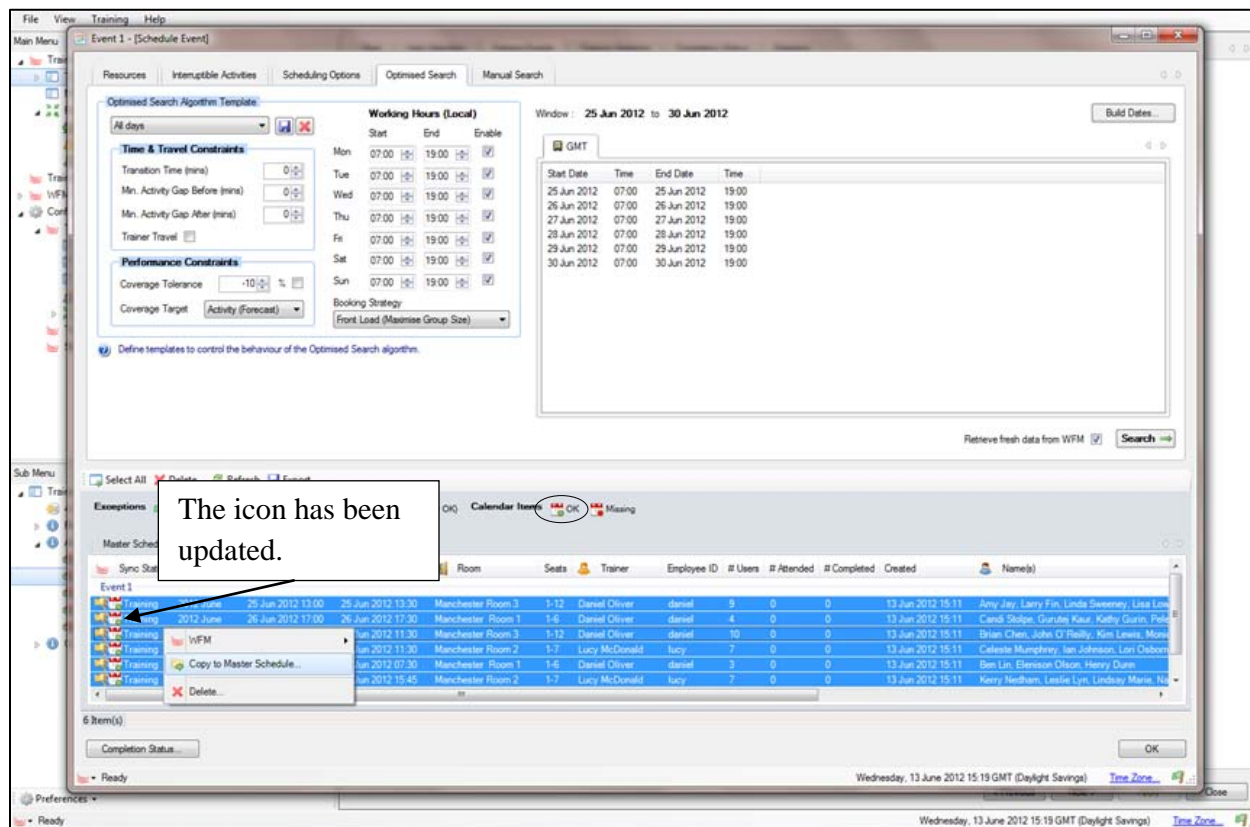
The training sessions will then appear in the Master Schedule. The flag will remain red until the WFM Master Schedule has been created. The flags will then change to green to confirm that the training sessions are now in the agent schedules.
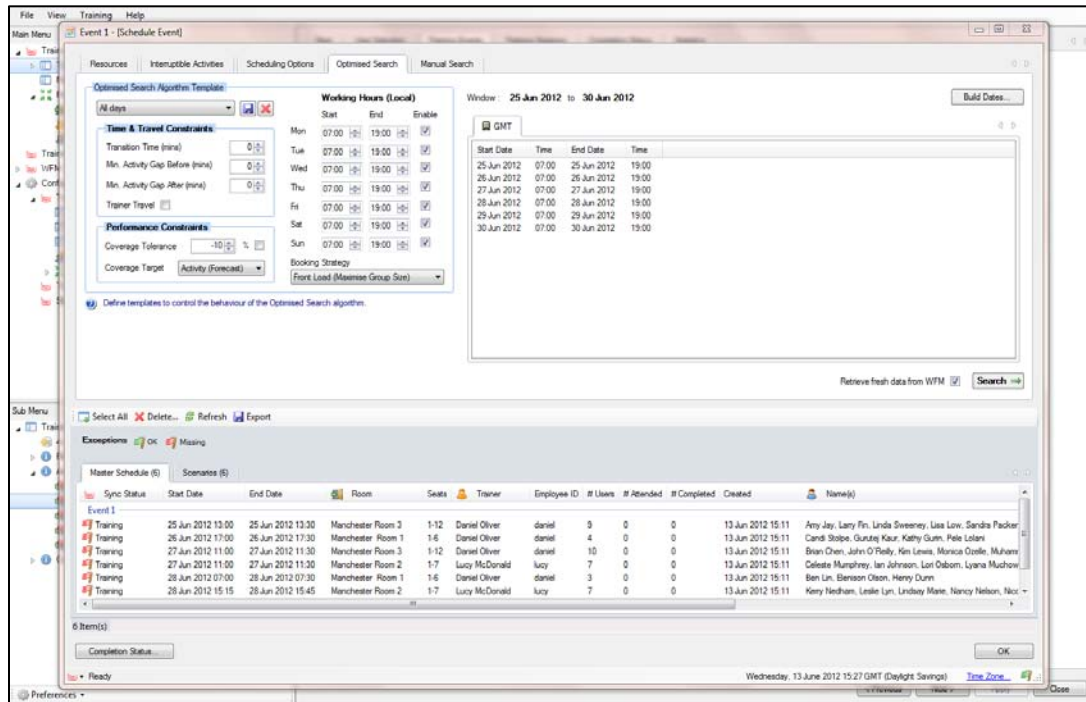
Change the schedule to the Master Schedule for future use if required.
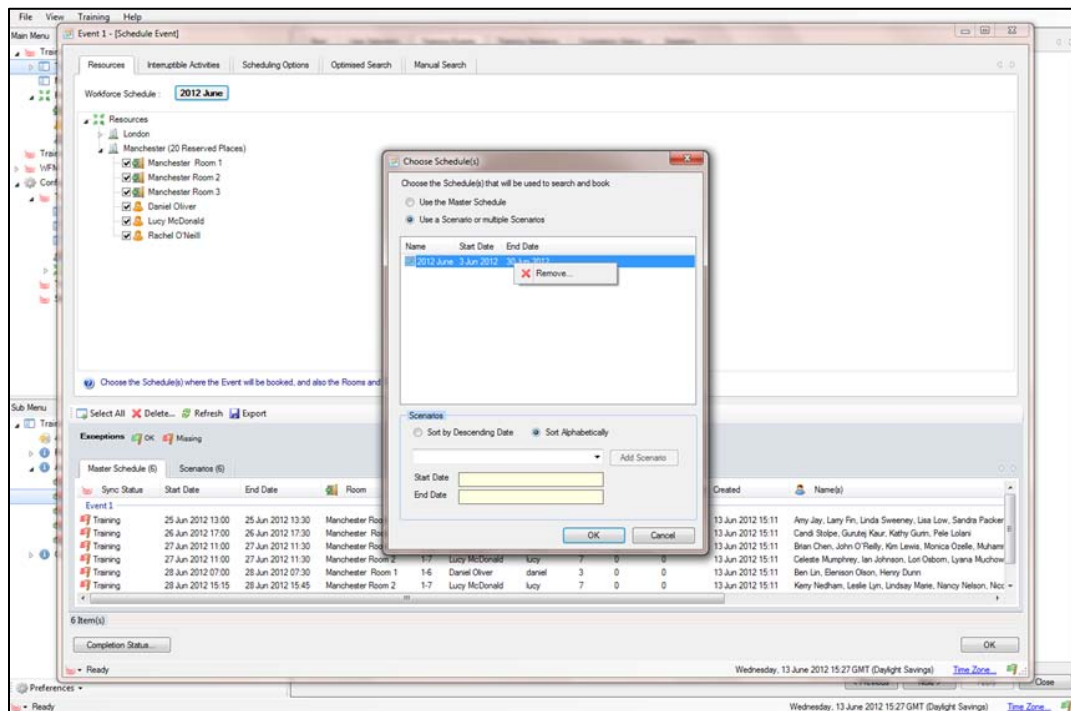
Save the Master Schedule.
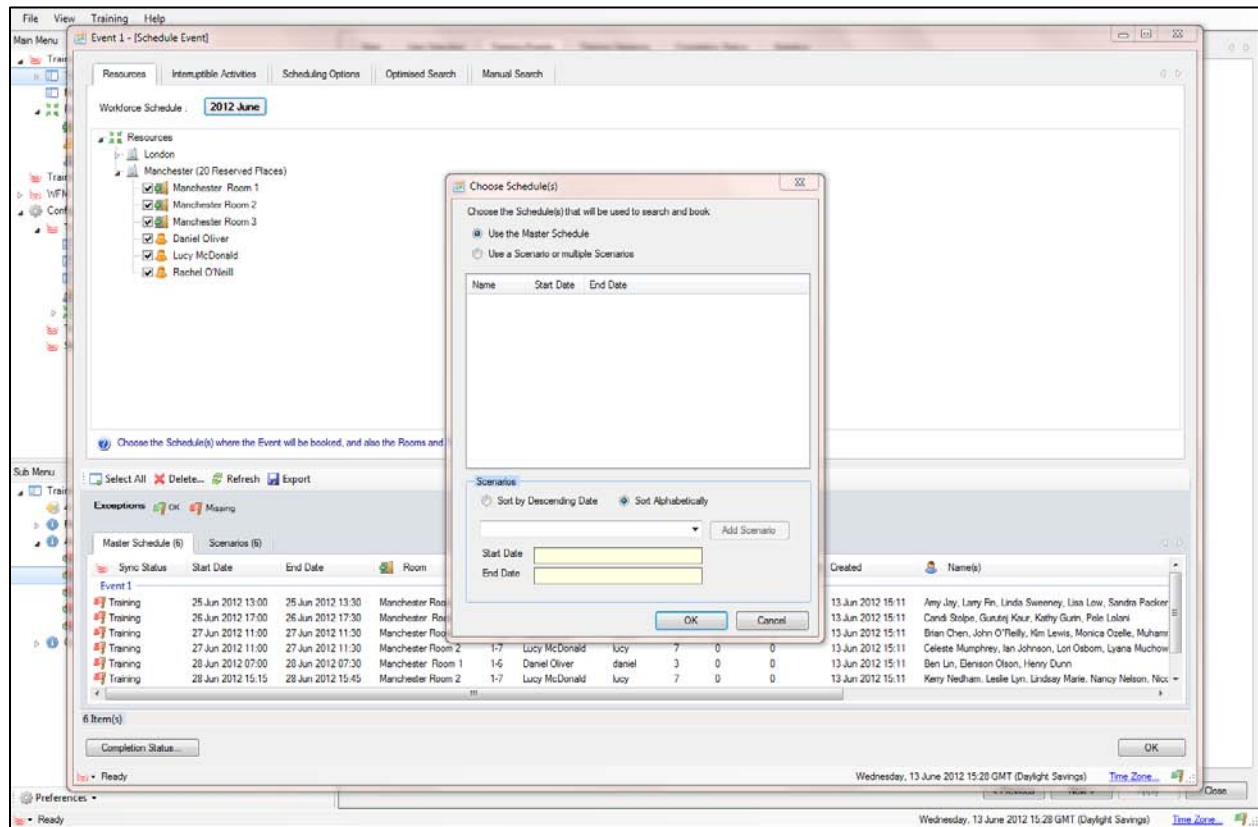
Reports

The following reports are available in Genesys Training Manager.

Training Request Completion Report

In the `Training Events` window, information is presented in tabular and gauge format to track the number of agents that have completed the training against the requirement.

Select the individual training request from the `Sub Menu`. Clicking the training request name displays a view similar to the example below.

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

Training Summary by Status Report

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

When you click the actual status, for example, `Active` or `Completed`, a summary appears for each of the training requests within that file, similar to the example below.

Agent Detail Completion Report by Training Event

A Completion Status report for the training event is available that lists all of the agents assigned to attend training.

This report is available by selecting `Completion Status`, found under `Training Requests` in the `Main Menu` window.

Select the relevant status, and then expand the view to locate the relevant training request in the `Sub Menu`. Selecting the last option displays a list of all of the agents that were selected for training. This view can also be filtered by either clicking at the top of the column heading, and/or using the available filters, for example, `Enable Status Filter`, or `Enable Date Filter`.

Completion Status Report

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

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

1. Status of training session; for example, `Pending Approval` or `Active`.

2. Course Code

3. Date

4. Training status; for example, `Missed` or `Scheduled`.

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

Individual Agent Training Summary Report

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

Expand `Training Requests` in the `Main Menu` window and select `Completion Status`. A list of all of the training status will appear; for example, `Pending Approval`.

Select the status to report against, and then right-click it to display the additional option of `View by`

`WFM database.`
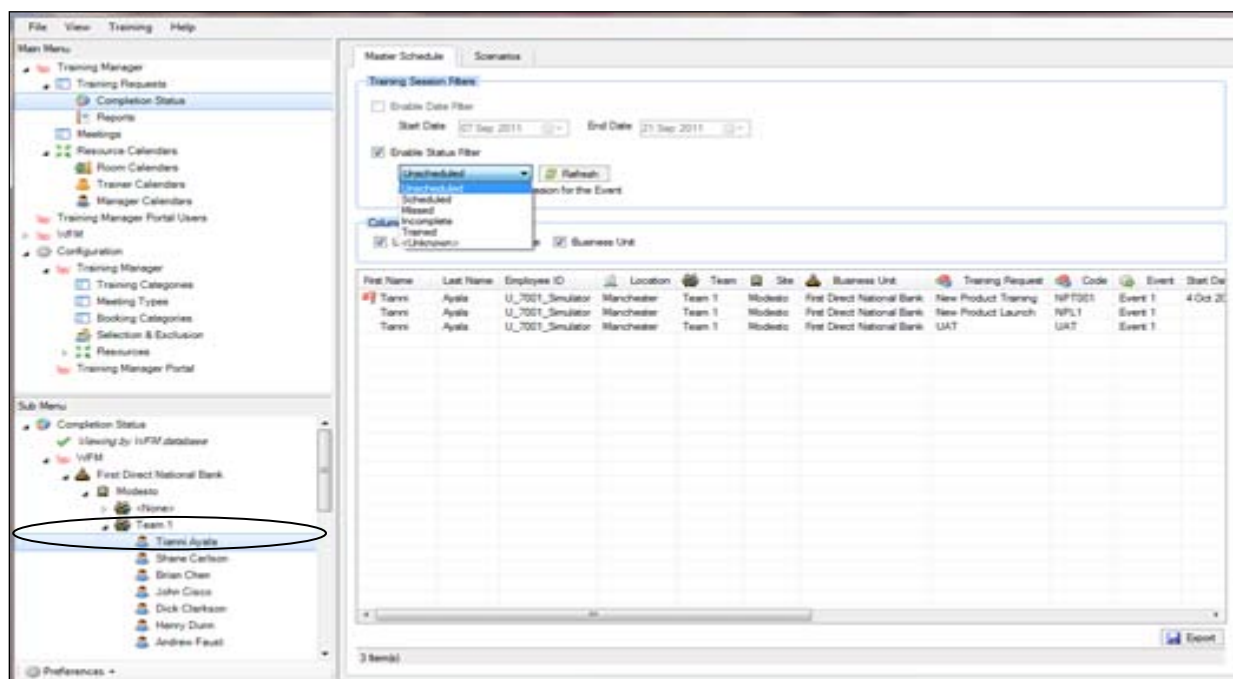
This will display a list in the `Sub Menu` of the available sites or scheduling pots to select from.

Expand the tree view in the `Sub Menu` down to the relevant team view to find the individual agent to report against.
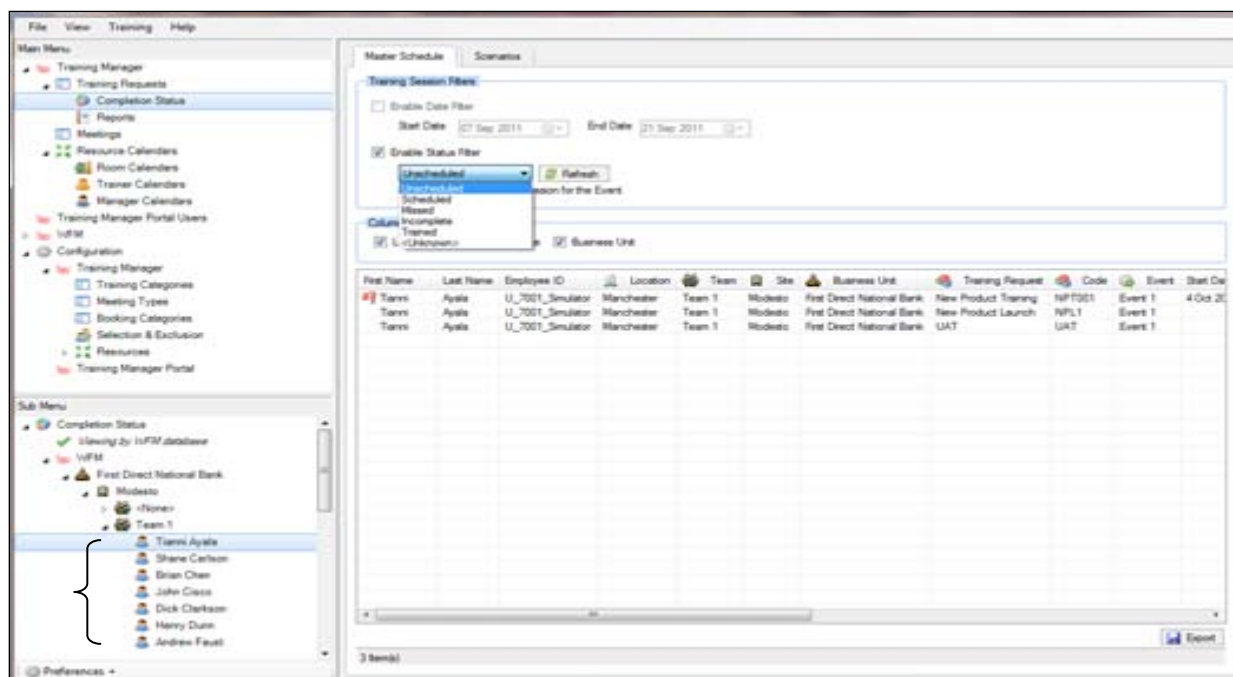
Click the individual agent to view all of their scheduled training activity, together with the status and any comments.

Date and status filters are also available.
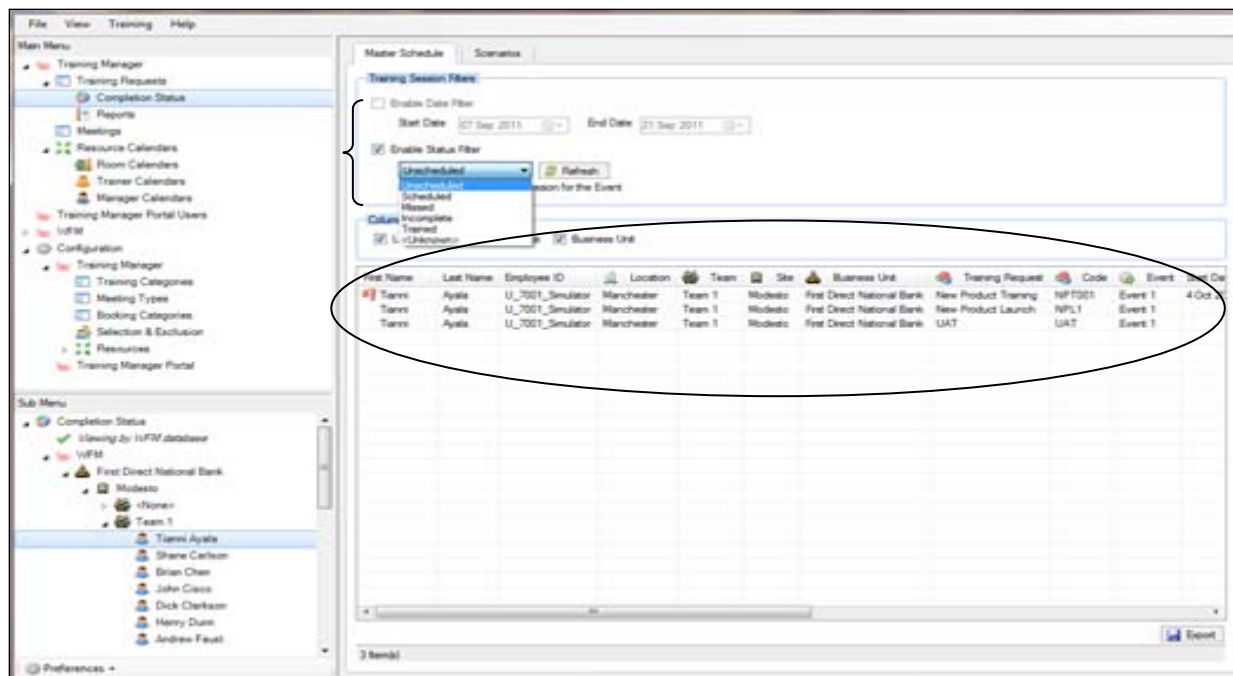
Exportable Training Overview Report

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

Select the required report from the Report drop-down menu. Change the date range in the Start Date and End Date fields if required, and then click Refresh.
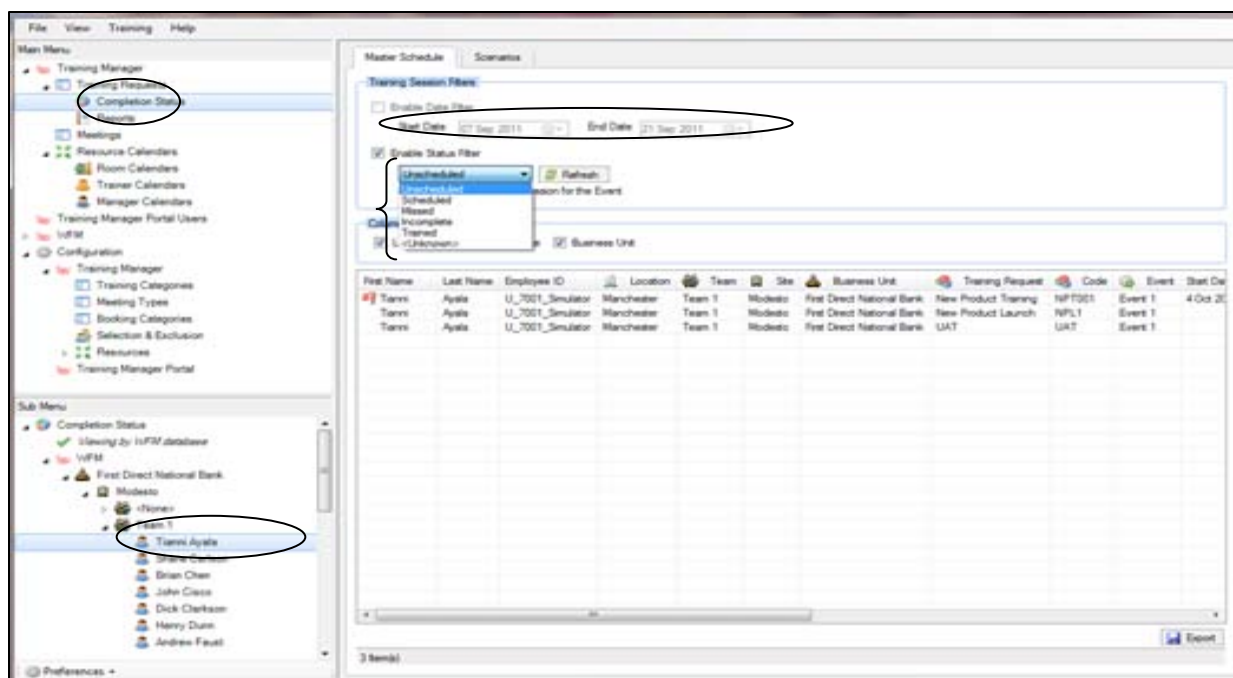
Any training activity in the selected date range will then be displayed.

This information can also be exported by clicking the *Export* button.
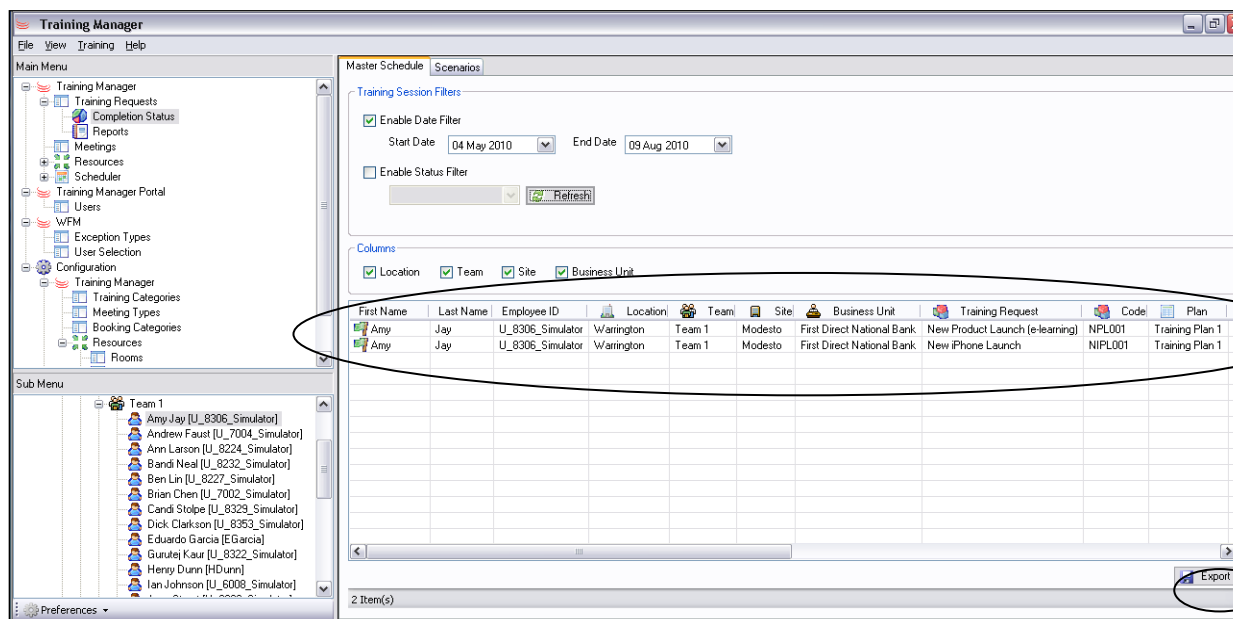
Multiple Trainer Courses Report

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

This information can be exported if required.

Select the required report.

Export if required, although the data could be immediately out-of-date.
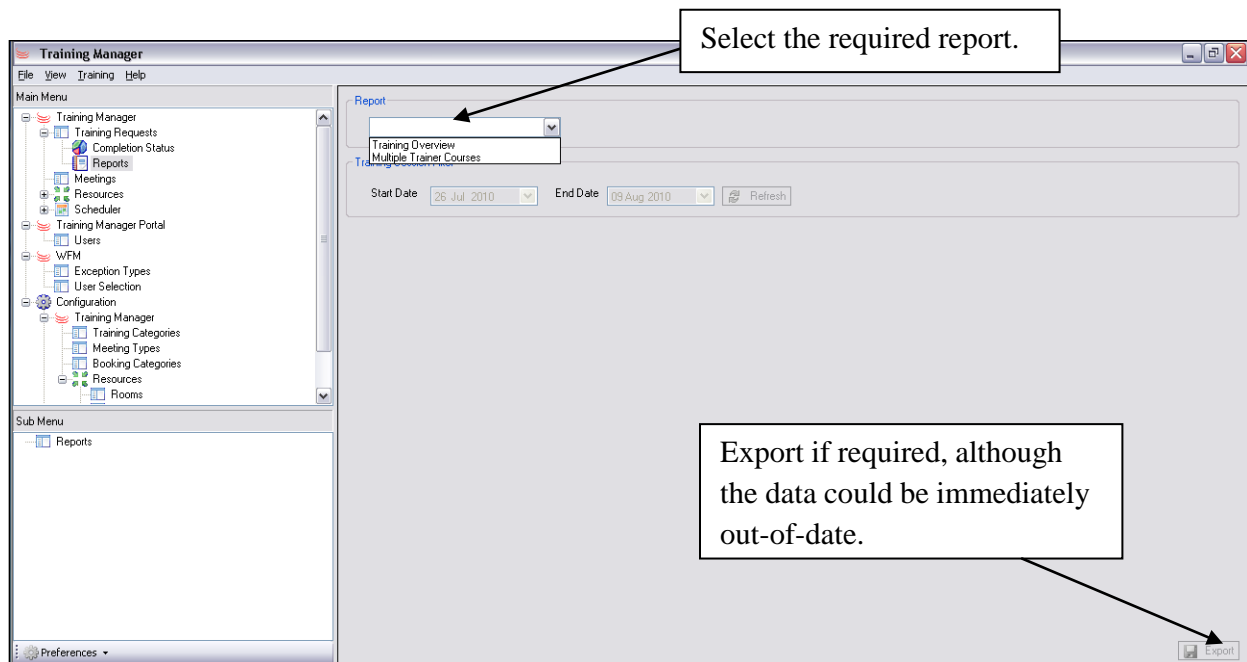
Useful Tips

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