

**Genesys Training Manager 8.1.1** 

# **Administrator Guide**

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## 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 <u>orderman@genesyslab.com</u>.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on <u>page 10</u>.

## **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 <u>Techpubs.webadmin@genesyslab.com</u>.

You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document. Please limit your comments to the scope of this document only and to the way in which the information is presented. Contact your Genesys Account Representative or Genesys Technical Support if you have suggestions about the product itself.

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## **Contacting Genesys Technical Support**

If you have purchased support directly from Genesys, ,see the <u>Contact Information</u> on the Tech Support website. Before contacting technical support, refer to the <u>Genesys Technical</u> <u>Support Guide</u> for complete contact information and procedures.

## **Related Documentation Resources**

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

• The *Framework 8.0 Configuration Manager Help*, which will help when using Configuration Manager.

### Genesys

Consult these additional resources as necessary:

- The *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library CD and which provides a comprehensive list of the Genesys and CTI terminology and acronyms used in this document.
- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at <a href="http://genesyslab.com/support">http://genesyslab.com/support</a>.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- Genesys Supported Operating Environment Reference Manual
- Genesys Supported Media Interfaces Reference Manual

Genesys product documentation is available on the:

- Genesys Technical Support website at <u>http://genesyslab.com/support</u>.
- Genesys Documentation Library DVD, which you can order by email from Genesys Order Management at <u>orderman@genesyslab.com</u>.

## **Document Conventions**

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthand for particular kinds of information.

### **Document Version Number**

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

42gp\_icg\_aspect-wfm\_08-2010\_v4.2.001.01

You will need this number when you are talking with Genesys Technical Support about this product.

### **Screen Captures Used in This Document**

Screen captures from the Configuration Manager graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the GUI; the error would not be corrected in any accompanying text.

## **Type Styles**

The Type Styles table describes and illustrates the type conventions that are used in this document.

### **Type Styles**

Type Style	Used For	Examples
Italic	<ul> <li>Document titles</li> <li>Emphasis</li> <li>Definitions of (or first references to) unfamiliar terms</li> </ul>	<ul><li>Please consult the <i>Genesys</i></li><li><i>Migration Guide</i> for more information.</li><li>Do <i>not</i> use this value for this option.</li></ul>
	• Mathematical variables Also used to indicate	A <i>customary and usual</i> 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 <i>x</i> stands for
Monospace font (Looks like teletype or typewriter text)	<ul> <li>All programming identifiers and GUI elements. This convention includes:</li> <li>The <i>names</i> of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages.</li> <li>The values of options.</li> <li>Logical arguments and command syntax.</li> <li>Code samples.</li> <li>Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.</li> </ul>	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. <b>Note:</b> 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:

7~
🦦 Training Manager 📃 💻 🗙
Welcome to Training Manager
User Name :
Password :
OK Cancel Details >>
Version 8.1.1
02012 Silver Lining Solutions Ltd. Genesys suite applications are covered by U.S. and Foreign Patents.

Complete the details as required and select 0K.

## 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
  - 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.
  - 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.
  - 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 -
  - Training Categories the different categories used in training activity for example, Trainer Led.
  - Meeting Types the different types of meetings associated with the specific meeting algorithm, for example, One-to-One, Team Meeting.
  - 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.
- 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.



## **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.

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3 Pelvenos +		in Astronomy in Linearce

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.

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## **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.

<ul> <li>Training Manager</li> </ul>	Contraction of the Distance of the Owner of	×
File View Training Help		
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Sub Menu Vensing Active Vensing Active Internal Internal Marchester Marchester Room 1 Marchester Room 2 Marchester Room 3 External		
Preferences +		Apply Cancel
· Ready	(3)*	Tuesday, 12 June 2012 11:07 GMT (Daylight Savings) Time Zone

### **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.

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54 Menu Charles & Locations Charles & Locations Charles & Charles Charles & Charles Charles & Charles	
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### **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.

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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.

File View Training Help		
Main Menu		
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⊳ See WFM		
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a 🥪 Training Manager		
Training Categories		
Meeting Types		
Booking Categories		
Selection & Exclusion		
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 View by Hierarchy - this lists the trainer manager and any associated trainers (creating the Trainers hierarchy will be covered later in the document).

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🥪 Training Manager Portal Users	
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Configuration	
a 🥪 Training Manager	
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Meeting Types	
Booking Categories	
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Sub Menu	
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Daniel Oliver	
Lucy McDonald	
Rachel O'Neill	
✓ ① External	
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🔅 Preferences 👻	

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.

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Select New Trainer; the Trainer screen will appear on the right-hand side of the window.

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▷ See WFM a ∰ Configuration	Last Name		
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Training Categories	Trainer Details		
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Rachel O'Neill			
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Ŭ			
🔅 Preferences 👻			Apply Cancel

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.

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Main Menu	Trainer	
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⊳ 🥪 WFM	Last Name Oliver	
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Second O'Neill		
① External	Update Information	
	Created Monday, 18 July 2011 by SYSTEM	
	Last Updated Sunday, 14 August 2011 by GenesysWFM\demo	
	Last opdated Suriday, I+ August 2011 by Genesysterm Genesysterm Genesysterm	
💮 Preferences 👻	Apply	Close

### **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.

#### Genesys Training Manager Administrator

File View Training Help					
Main Menu	Trainer				
🔈 🦢 Training Manager					
🥁 Training Manager Portal Users	First Name	Daniel			
⊳ 😸 WFM	Last Name	Oliver			
a 🌼 Configuration	Employee ID	daniel			
a 🥁 Training Manager	Trainer Details				
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Rooms & Locations			•		
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Managers	Working Hours	Working Rules Location	ns Skills		
🦢 Training Manager Portal					
🥁 Skills Assessor	Maximum Hours F	'er Day	8 🐳 Hours		
	Maximum Hours F	<sup>v</sup> er Week	36 🚔 Hours		
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### 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 rightclick 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.

#### Genesys Training Manager Administrator

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### **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.

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### 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.

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A drop-down menu appears, from which you can select the skill that you want to add.

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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.

#### Genesys Training Manager Administrator

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To create a new skill, right-click Trainer Skills and select New Trainer Skill.

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The option to create a new skill code and name is now available.

Click Apply when you are finished.

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MSWORD - Microsoft Word			
i dh a t			Apply Cancel
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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.

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### **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.

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## **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.

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Training Categories	1
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Sub Menu	
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Louise Spencer	
a Oliver Wilson	
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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.

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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

Genesys'			Training Manager Training Portal
Alice Talbot - [alice]			Logout
	my options	training roadmap	
	alendars	Starting between 12 May 2012 and 12 Jul 2012	
	manager calendar	(A maximum of 5 items are shown below)	
	<ul> <li>agent calendar</li> </ul>	View the full Training Roadmap	
	¥ room calendar	New Product Training (NPT001)	
	Your working hours	Business Sponsors : A N Other 18 Jun 2012 - 30 Jun 2012	
	set your regular working hours	<ul> <li>Self Learning Time (SLT001)</li> </ul>	
	<ul> <li>set exceptions to your regular hours</li> </ul>	18 Jun 2012 - 30 Jun 2012	
	settings		
	change your time sone     tour current time sone     tour current time sone		
Genesys Training Manager Portal 8.1.1			Copyright © 2012 Silver Lining Solutions Ltd. All Rights Reserved.

## **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.

Genesys:		
Alice Talbot - [alice]		
Set Your Regular Working Ho	urs	
Information	Day Of Week Start Time	End Time Is a Working Day
Change the data to set your default working days and hours. This highlight represents a non-working day.	Monday 07 💌 00	• 19 • 00 • 🗸
noris, misingingin represents a non-norking cay.	Tuesday 11 💌 00	• 22 • 00 • V
	Wednesday 07 💌 00	
	Thursday 07 💌 00	
		• 19 • 00 • V
	Saturday Sunday	
	Save	
Genesys Training Manager Portal 8.1.1		

#### **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.

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	Tue 12	52	11 = 00 =	22 * 00 *		Wed 27		07 * 00 *	19 = 00 =	52
	Wed 13	[7]	07 - 00 -	19 - 00 -	17	Thu 28	173	07 - 00 -	19 + 00 +	121
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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.

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& Alice Talbot & Louise Spencer ⊳ <u>III</u> Manchester	
🔅 🎲 Preferences 👻	Apply Cancel

# 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.

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File View Training Help		
Ner User Toming Prep Ner Herv Training Manager Training Manager Training Manager Mediugs Training Anager Training Anager Training Manager Partal Users Training Manager Training Camprise Medium Training Manager Training Camprise Medium Training Manager Training Camprise Medium Training Manager Training Types Medium Training Manager Training Types Medium Training Manager Medium Training Manager Manager Medium Training Manager Medium Training Mana	Sector Dative Mose Prot Devel Neuronal Bank Prot Devel Neuronal Bank Prot Devel Neuronal Bank Protocol Protoco	
@Polesce -		

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.

File View Training Help	
Prier Verse Terening Helig Main Merce Training Manager Training Manager Training Manager Celenders Training Manager Celenders Manager Celenders Training Manager Furtel Users Celendgoretien Training Celegories Meeting Types Boloting Calegories Selenters & Exclusion Training Celegories Managers Selenters & Exclusion Selenters & Exclusion Selenters & Exclusion	Imply Music     Imply Music       Frei Der of an and and and and and and and and and
@ Podesnos +	

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.

Training Manager     Training Research     Meetings     Training Research     Meetings     Training Manager     Training Categories     Training Categories     Training Categories     Training Manager     Training	Anton Other Backares Anton Other States Antone States Anton States Antone States Antone States Anto	•
© Inference +		

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.

File View Training Help				
Main Menu				
	Exclusions	Global Exc	Date	🖉 Refresh
A Resource Calendars				
A Trainer Calendars			Employee ID	Exclusion Reason
Manager Calendars	Andrew		U_7004_Simulator EGarcia	Long Term Sick Long Term Sick
🥁 Training Manager Portal Users		Garcia	Edalda	Long Term Sick
> 😸 WFM				
A 🎲 Configuration 🔳				
⊿ 🦢 Training Manager III Training Categories				
Meeting Types				
Booking Categories				
A Selection & Exclusion				
a a s Resources				
Rooms & Locations     Trainers				
Managers				
Sub Menu				
Selection & Exclusion				
1.0				
Preferences -				

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.

File View Training Help								
Main Menu		Coloritor	Curve	Exclusion				
🝙 🦢 Training Manager		Selection	Global	Exclusion	15			
Training Requests		Exclusion	ns List	By Date				
Meetings		1 (* * * * * * * * * *						
⊿ 📲 🛱 Resource Calendars		🕜 Choo	se dates w	hich will b	e exclu	ded for	all sche	duling, and then click the items to apply the exclusions to.
🛃 Room Calendars								
🚨 Trainer Calendars		•	Se	ptember	2011		•	🖌 📥 First Direct National Bank
a Manager Calendars 🚨		M	T W	Т	F	S	S	Modesto
🥁 Training Manager Portal Users				1	2	3	4	☑ 🎆 Team 1
⊳ 🥪 WFM		5	6 7	8	9	10	11	□ 🎇 Team 2
Configuration		12	13 14	15	16	17	18	🗌 🎆 Team 3
🖬 🥁 Training Manager			20 21	22	23	24	25	🗌 🎆 Team 4
Training Categories			27 28		30			
Meeting Types		20	27 20	25	50			🗌 🎆 Team 4
Booking Categories								∰ Team 5
Selection & Exclusion								
a a k Resources								🗌 📮 Cincinnati
Rooms & Locations Trainers								
Managers								
Managers	-							
	-							
Sub Menu								
Selection & Exclusion								
🔅 🎲 Preferences 👻								

# **Deleting a Manager**

To delete a manager, right-click the manager and select Delete Manager from the list.

File View Training Help		
Han Hene	Manager	
Trening Manager     Training Requests     Teaming Requests     Second Calendars     Training Calendars     Training Calendars     Training Calendars     Manager Protocol Usione	Ped Name Dado Lat Name Mitas Englegen D shale Manager Details	
Works Annual Manager     Training Manager     Training Categories     Meeting Types     Dooling Chapories	Adve If Loolors	
Selection & Exclusion  T Resources  Resources  Remove & Lacations  Remove A Lacations  Remove Remove	Bast         End         End/#           Man         07:00         (b)         19:00         (b)           Tue         07:00         (b)         19:00         (b)	
Site Managers w Univergent Constant if the Locations if London if Managers	West         0700         (b)         (b)           Thu         0700         (b)         (b)           No         0700         (b)         (b)           No         0700         (b)         (b)           Sat         0700         (b)         (b)           Sat         0700         (b)         (b)           Sat         0700         (b)         (b)	
Cherry Denks Manager     Cherry Denks Manager     Vers by Locator     Vers by Locator     Vers Vy Rehabilical Order     Vers Inscript Managers     Vers Inscript Managers	Under Minuter Created Nordey, 18.July 2011 by 21/3100 Last Updated Nordey, 18.July 2011 by 31/3100	
@Poferences •	- Aviv	lose

#### **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.

File View Training Help
lain Menu
a 🥪 Training Manager
Training Requests
Meetings
្ន 🚆 🛱 Resource Calendars
Koom Calendars
🚨 Trainer Calendars
anager Calendars 🚨
🦢 Training Manager Portal Users
> 🥪 WFM
> 🎲 Configuration
ub Menu
Training Manager Portal Users
Administrators
Managers
Trainers
④ Agents
da -
🔅 Preferences 👻

## **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.

File View Training Help	
Main Menu	Training Manager Portal Administrator
Fraining Manager     Training Requests	The Administrator has the high-set level of access to be able to view and change entrestiles and assign permissions.
Meetings	First Name  Last Name
🚮 Room Calendars 🚨 Trainer Calendars	Last vame Employee ID
Anager Calendars	Login Details
▷ See WFM ▷ See WFM ▷ See WFM	User Name Password Reset
	Leave blank to preserve existing password
Sub Menu	
🝙 🔲 Training Manager Portal Users	
🖌 🕕 Administrators	
Administrator Test	
<ul> <li>Managers</li> <li>Trainers</li> </ul>	
Agents	
• • •	
🐡 Preferences 👻	Apply Cancel

## **Deleting a Training Portal Administrator**

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

File View Training Help		
Nam Merce Transing Manager Transing Requests Transing Requests Transing Requests Transing Resource Calendars Transing Manager Restal Users Transing Manager Pertal Users	Training Manager Partal Adversation           Image: Training Manager Partal Adversation           Image: Training Manager Partal Adversation           Image: Training Manager Partal Adversation           Field Name         Adversation           Last Name         Training           Engineers         Training           Engineers         Training           Last Name         Training           Last Name         Adversation           Last Name         Adversation	7
Sub Menu Training Manager Partal Users O Manager O Manager O Manager O Manager O Agents		
Patentos +		Anthy Dese

#### **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.

File View Training Help	
Main Menu	Training Manager Pottal Manager
<ul> <li>✓ Training Manager</li> <li>► Training Requests</li> <li>■ Meetings</li> <li>■ ** Resource Calendars</li> <li>♥ Resource Calendars</li> <li>♥ Trainer Calendars</li> <li>♥ Manager Calendars</li> <li>♥ WFM</li> <li>♥ Configuration</li> </ul>	Image: Strategy     Name     Alice Talbot       Employee ID     alice       Login Details       User Name     alice       Password Reset       Leave blank to preserve existing password
	Created Wednesday, 31 August 2011 by GenesysWFM\demo Last Updated Saturday, 3 September 2011 by GenesysWFM\demo
Sub Menu	
Training Manager Portal Users  Administrators  Administrator Test  Administrator Test  Administrator Test  Administrator Test  Charlie White  Charlie White  Charlie White  Charlie Spencer  Administrator  Agents  Agents	
💮 Preferences 👻	Apply Close

#### **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.

Main Menu	Grant access	Grant acc	ess to all from WFN	/ 💢 Remove all Access 🌼 Reset all User Names and Passwords 🔗 Refresh	
a 🥁 Training Manager			<b>F</b> 1 10		
Training Requests			EmployeeID	User Name	
Meetings		Jay	U_8306_Simulator		
Resource Calendars	Andrew	Faust	U_7004_Simulator		
Room Calendars	Ann San San San San San San San San San S	Larson	U_8224_Simulator		
	andi 🖉	Neal	U_8232_Simulator		
Trainer Calendars	🐣 Ben 🙈 Brian	Lin	U_8227_Simulator		
anager Calendars 🚨	- Snan Candi	Chen Stolpe	U_7002_Simulator U 8329 Simulator		
Search States States States Search States States Search States State	Celeste		U_8230_Simulator		
⊳ 🥪 WFM	Biana	Olson	U_8241_Simulator		
<ul> <li>Configuration</li> </ul>	A Dick	Clarkson	U_8353_Simulator		
▲ Second guident ▲ Second guident ▲ Second guident	S Eduardo	Garcia	EGarcia		
		Olson	U 8242 Simulator		
Training Categories	S Gurutej	Kaur	U 8322 Simulator		
Meeting Types	A Henry	Dunn	HDunn		=
Booking Categories	an an	Johnson	U_6008_Simulator		
Selection & Exclusion	a Joan	Stuart	U_8330_Simulator		
Resources	🙇 John	O'Reilly	U_8239_Simulator		
Rooms & Locations	a Kai	Lemieux	U_8225_Simulator		
Trainers	🙈 Kathy	Gurin	U_8223_Simulator		
	🙈 Keny	Nedham	U_8236_Simulator		
Managers	🙈 Kim	Lewis	KLewis		
	🐣 Lany	Fin	U_7005_Simulator		
Sub Menu	🚨 Leslie	Lyn	U_8326_Simulator		
Training Manager Portal Users	🚨 Linda		U_8332_Simulator		
Administrators	🚨 Lindsay	Marie	U_8335_Simulator		
	🚨 Lisa	Low	U_8298_Simulator		
Managers	🚨 Lori	Osbom	U_8244_Simulator		
I Trainers	🚨 Lyana	Muchow	U_8229_Simulator		
Agents	& Lynne	Suzanne	U_8304_Simulator		
	A Mary	Gail	U_8307_Simulator		
	A Megan	Parker	U_8351_Simulator		
	A Monica	Ozelle	U_8293_Simulator		
	A Muhammed Fouad	Nelson	U_8231_Simulator U_8237_Simulator		
	A Nathaniel	Parrish	U_8247_Simulator		
	A Nicole	Stutts	U_8331_Simulator		
	Ratty Ann	Nibecker	U_8238_Simulator		
	A Pele	Lolani	U 8292 Simulator		
	A Rachel		U 8246 Simulator		
		- addition	o de lo dimulator		Export
					Ξ Ξχροπ

## 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.



Training Manager Portal home page view.

-	\[		
come	)		
gin, enter	r your User Name and Password belov	v	
	These details are case-sensitive		
	Enter Your Details		
	User Name		
	Password		
	Continue		
	Trouble logging in?		
	This website uses a & Cookie to remember your login details. If your brows		
	To try and remedy this, check that your browser is able to accept Cookies, o	r try clearing your Cookies cache.	

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.

Senesys:			Training Manager Training Portal
Location : Main Menu Alice Talbot - (alice)			Logout
	my options	training roadmap	
	Calendars     Calendars     manager calendar     mager calendar     room calendar     vour workling hours     set your regular workling hours     set work regular workling hours     set work regular workling hours     set work regular workling hours     set your regular workling hours     set work regular workling hours     set your regular workling hours	Craining roadmap  Starting between 12 May 2012 and 12 Jul 2012  Answing 61 Discover as glown below  New The full Training Roadmap  New Product Training (NPT001) Balax 50,000 - 70 Jul  S off Learning Time (ST001) I Jul 2012 - 30 Jul  S off Learning Time (ST001)	
Generys Training Manager Portal 8.1.1			Copyright @ 2012 Silver Lining Solutions Ltd. All Rights Reserved.

## **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.

File View Training Help				
Nan Ness Training Manager I Training Requests	Room Calendar         Location 1 Room 1           Sat Date         05 Say 2011         0         End Date         20 Say 2011         0         End Date         End Date			
Converge Pressents     Meetings     Mee	Start Time         End Time         Boulding Category         Pressee           Start Tay, 10 September 2013         III         IIII 55 Sep 2011 18:00 To Sep 2011 18:00 Toward, Semion         UAT (UAT) - Event T with Daniel Offwar           Start Tay, 11 September 2013         IIII Sep 2011 18:00 Th Sep 2011 18:00 Toward, Semion         UAT (UAT) - Event T with Daniel Offwar			
Sub Menu				
© Poleences +		Leot		

After selecting New Room Calendar Entry, the room booking form appears.

Complete the details as required and click Apply.

File View Training Help	
Main Manu	Room Calendar Entry Room Calendar Entry Rupose Start Date 13 Sep 2011 Start Time 0000 Select the Book ing Category from the drop-down box and complete the start and end time. Any notes can also be included. Click on App Ly once completed.
Sub Menu	

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.

File View Training Help		
Main Menu	r Trainer	
a 🦢 Training Manager 🔺		
Training Requests	First Name Lucy	
Meetings	Last Name McDonald	
⊿ 📲 🛱 Resource Calendars	Employee ID lucy	
🚮 Room Calendars	Trainer Details	
🚨 Trainer Calendars	Trainer Details	
anager Calendars		
Search and Search		
D 😸 WFM		
a 🌼 Configuration 🗮	Manager Solution Solu	
a 🦢 Training Manager	Active 🔽	
Training Categories		
Meeting Types	Working Hours Working Rules Locations Skills	
Booking Categories     Selection & Exclusion		
Resources	Working Hours Lunch	
Rooms & Locations	Start End Earliest Latest	
> Trainers	Mon 07:00 🔄 19:00 🗢 11:00 🐳 14:00 🗢	
Managers		
· · · · · · · · · · · · · · · · · · ·		
Sub Menu	Wed 07:00 🔄 19:00 🔄 11:00 🔄 14:00 🔄	
Trainers	Thu 07:00 - 19:00 - 11:00 - 14:00 -	
Viewing Active by Location	Fri 07:00 🔶 19:00 🔶 11:00 🐳 14:00 🚔	
() Internal	Sat 07:00 🔄 19:00 🗢 11:00 🗢 14:00 🗢	
No Location>	Sun 07:00 🖈 19:00 🖈 11:00 🖈	
⊳ 🛄 London		
🖌 🚊 Manchester		
🚨 Daniel Oliver		
🚨 Lucy McDonald		
🚨 Rachel O'Neill		
① External	Last Updated Saturday, 3 September 2011 by GenesysWFM/demo	
		_
🔅 🔅 Preferences 👻	Apply Close	
		_

To view the trainer manager hierarchy, change the Sub Menu view to View by Hierarchy by rightclicking the Trainers option in the Sub Menu.

File View Training Help			
Man Mena			1
a 🖮 Training Manager			
# III) Towning Requests			
T Meetings			
· Resource Calendars			
Room Calendars			
🚨 Trainer Calendare			
A Manager Calendara			
🐜 Training Manager Portal Users			
a 🛶 toffse			
+ Configuration	14		
. 🔤 Training Matager			
Training Categories			
Meeting Types			
Booking Categories			
Selection & Exclusion			
Resources     Roome & Locations			
	-11		
Managera			
and the second second			
Sub Menu			
- ID Terret			
A Stev External Trainer Category			
· O . · · · · · · · · · · · · · · · · ·			
A see of roughly			
Ves by Herbridg			
Vervity Aphabetical Order			
Vev Adve Terrers			
Vew Inactive Teatrees			
and the second se			
O External			
O Podesnos +			

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.

Senesys <sup>.</sup>		Training Manager Training Port	al
Location : Main Menu > Trainer Calendar Hello, Eddie Talbot		Line of the second s	3.
trainer calendar			
A Required fields are all shaded in this colour			
Key	Standard View Planner View		
scheduled Training or meeting partially or fully scheduled     completed Training no longer requiring action     Other Non-Training Activity trainer	Search Gata Advanced Search Information There is currently no data to show.	Start Date 18 July 2010 🗰 End Date 13 August 2010 👫 Sort By Trainer 💌 💽	
<ul> <li>View by Location</li> <li>O View by Alphabetical Order</li> <li>View by Hierarchy</li> </ul>			
Select All   Unselect All			
<ul> <li>Minternal</li> <li>Alyson Bushel [700657979]</li> <li>Bovid Hill [12345678]</li> </ul>			

#### **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.

File View Training Help		
Man Meru  Traning Manager  Traning Resuets  Metings  25 Resource Celenders  Traning Resuer Celenders  Hanger Celenders  Hanger Celenders  Celen	Trainer Calendar     Daniel Oliver       Bat Dec 06 Sep 2011     -     Bid Dec 20 Sep 2011       Star Tee     Bid Tee     Bid Dec 20 Sep 2011       Star Tee     Bid Tee     Bid Sep 2011       Star Tee     Bid Sep 2011     Sep 2011       Star Tee     Bid Sep 2011     Sep 2011       Star Tee     Sep 2011     Sep 2011       Star Tee     Sep 2011     Sep 2011       Star Tee     Sep 2011     Teering Sessory       UAT (UAT)-Event Ter Lacation 1 Room 1	
Sub Menu Trainer Calendars		
© Preferences +		beot.

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.

File View Training Help							
Main Menu	- Trainer Calendar	Entry					
	Trainer Booking Category Purpose Start Date	Entry Daniel Oliver [daniel] Holiday Holday Holday U4 Sep 2011	End Date 14 End Time 01	▼ ▼ ■			
Sub Menu  Trainer Calendars  Viewing by Location  Sub AnoLocation  Duine Location  Locy MoChonald  Anothester  Ano							
Aschel O'Neill						Apply	Cancel

File View Training Help		
Man Meru Training Managar Training Managar Training Managar Reson Calenders Managar Calenders Managar Calenders Managar Patal Olans With Configuration	Trainer Calendar : Daniel Oliver         Bart Date _ 06 Sap 2011 End Date _ 20 Sap 201 End Date _ 20 Sap 20 End Date _	
Sub Menu	Edit Calendar Entry	
Shearing dy Location     Second Second     Second Second     Devel Office     Devel Office     Devel Office     Rachel Dhiell		
© Polesinus -		Geot

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.

Senesys:		Training Manager Training Portal								
Location : Main Menu > Trainer Calendar										
Hello, David Hill							1.000			
trainer calendar										
A Required fields are all shaded in this colour										
Кеу	Standard View	Standard View Planner View								
Uncategorised			<u>x</u>	d	ick to refresh the calendar	if you have changed	d the content to view Refresh			
Holiday	<> today -	< > today - August 2010 Day Week Month								
Management Meeting		-		David I						
Meeting	Mon 26	Tue 27	Wed 28	29	Fri 30	Sat 31	Sun 01 Aug			
Training Session			New entry							
Training Session	2	3	Go to today	5	6	7	8			
	-		Show 24 hours							
	9	10	11	12	13	14	15			
	16	17	18	19	20	21	22			

# 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 0K, 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.

File View Training Help	201				
Hern Hans > Training Manager Pursi Users - Training Manager Pursi Users - UKH - Ecception Topes - Configuration - Ecception Topes	Training Category Name Nates	CETINGAANNE			
Training Categories     Menting Types     Booking Categories     Booking Categories     Booking Categories     Signature     Taranag Manager Partal     Solita Assessor	And the second second second second second	(Turing (2) (2) (2) (2) (2) (2) (2) (2) (2) (2)	Nr. EYSTEM Nr. Genergyttetti dana	Come .	
Sub Menu Training Categories V Menug Active Taning Taning Taning Taning Taning Delete Tearing Categorie Ver Active Tearing Categorie Ver Mactive Tearing Categorie Ver Mactive Tearing Categorie	The Deserve	en Type dies rot ead	n Dunne		
i (i) Preferences +					Autor Dames

# 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.

File View Training Help			
Marc Merco			
> 늘 Training Marager			
🐷 Training Manager Portal Users			
a 🐷 battat			
Exception Types			
. Configuration			
Training Categories	6		
Meeting Types     Booking Categories	0		
Selector & Exclusion			
> 11 Resources			
🐷 Training Manager Pintal			
Solla Jasensor			
Sale Merci			
I lies Meetry Type	6		
A View Active Meeting Types			
View Inactive Heating Types			
0.0			
Profesences +			

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.

File View Training Help				
Mary Minu:	Meeting Type Name Boding Agother Name Decention Type Addree	-Then Heating Types Meaning One To One	- Case	Select the correct booking algorithm.
Sub Menu Weeting Types of Utwary Active Doe To One Tran Huddle Tran Mating				
Distances +				Apply Cancel

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.

File View Training Help				
Man Nerve	Meeting Type			
in 🕍 Training Manager	Same	One To One		
im Training Manager Portal Usars	Decision of the second strends of the			
a torial	Boxiong Agothin	One To One	-	
Configuration	Nation			
a ter Training Manager				
Training Categories				
Heating Types	Exception Type	Tage Hoting	(Duran )	
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## **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.

File View Training Help		
Man Menu	Booking Category	
Erraning Manager     Traning Requests     Traning Requests     Resource Calendars     Resource Calendars     Anager Calendars     Training Manager Calendars     WFM     WF WFM     Configuration     Training Manager     Training Manager     Training Manager     Training Manager     Training Manager     Training Calegories	Name     Holday       Color     Image: Color       Roum Calendar Category     Image: Color       Tminor Calendar Category     Image: Color       Menager Calendar Category     Image: Color       Is Working Time     Image: Color       Active     Image: Color	
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Sub Menu Sub Menu Viewing Jetrive Relidey Meding Meeting Training Session		
Preferences	Tuesday, 12 June 2012 23 02 GMT (Daylight Savin	Apply Close

## **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.

#### Genesys Training Manager Administrator



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

below.	Template Tabs
File       View       Training       Help         Main Meru       ✓       Lineining Manager         ✓       Training Requests       Image: State St	Stat       User Selection       Training Events       Training Sessions       Completion Status       Statistics <ul> <li> <li> </li> <li> </li></li></ul> <li> </li> <li> <li> <ul> <li></li></ul></li></li>
Sub Menu  ITraining Requests  Sub Menu  ID Training Requests  Sub Menu  ID Training Requests  ID Active  D Active  D Completed  ID Completed ID Completed  ID Completed ID Co	Training Manager Potal       Also displayed on the Training Roadmap         Dates       Window Start Date       13 Sep 2011         Window End Date       13 Oct 2011       *         Update Information       Created       Tuesday, 13 September 2011       by GenesysWFM/demo         Last Updated       Tuesday, 13 September 2011       by GenesysWFM/demo       Apply       Close
🔅 Preferences 👻	CITEVIOUS INEX > Apply Liose

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:
  - Pending Approval-used in the first instance when a training request is raised.
  - 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.
  - Completed-used to store any completed training request.

File View Training Help	
Harr Here: Image: Second	Start     User Selection     Tearing Seems     Completion Statut     Statutus       Image: Selection     Tearing Seems     Completion Statut     Statut       Image: Selection     Tearing Seems     Tearing Seems     Statut
Sdi Meru Training Rosanta	Sec.e     Providing Ageneral       Terring Manager Proc     Complexed       Terring Manager Proc     Complexed       Window Start Date     12 Sec 2011       Window Start Date     13 Occ 2011       Window Start Date     13 Occ 2011       Content     Sectored       Content     Sectored 2011       Late Updated     Tensing: 13 Sectorebox 2011       Manager Torman     Sectorebox 2011       Sectored     Tensing: 13 Sectorebox 2011
O Podesecca: +	Themas Modiana Antro Communication

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).

File View Training Help Man Menu	
a 🏣 Training Hanager	Bat UserSelector Taring Events Training Sessions Completion Status Statutes
- C Traning Requests	B Enter variaus descriptive and key information about the Training."
C Meetings	
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	3 4 5 6 7 8 9
	Teday: 13-99/2011
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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.

File View Training Help		
File     View     Training Prep       Main Meru <ul> <li> <li></li></li></ul>	Start       User Selection       Training Events       Training Sessions       Completion Status       Statistics         Image: Choose from Workforce Management who will be receiving this Training.       Selection       Global Exclusions         Display Mode       Image: WFM Hierarchical       Image: Choose From Training Sessions       Image: Choose From Training Sessions         Image: Choose From Training Sessions       Image: Choose From Training Sessions       Image: Choose From Training Sessions         Image: Choose From Training Sessions       Image: Choose From Training Sessions       Image: Choose From Training Sessions         Image: Choose From Training Sessions       Image: Choose From Training Sessions       Image: Choose From Training Sessions         Image: Choose From Training Sessions       Image: Choose From Training Sessions       Image: Choose From Training Sessions         Image: Choose From Training Sessions       Image: Choose From Training Sessions       Image: Choose From Training Sessions         Image: Choose From Training Sessions       Image: Choose From Training Sessions       Image: Choose From Training Sessions         Image: Choose From Training Sessions       Image: Choose From Training Sessions       Image: Choose From Training Sessions         Image: Choose From Training Sessions       Image: Choose From Training Sessions       Image: Choose From Training Sessions         Image: Choose From Training Sessions       Image: Choo	Click on Choose to access additional selection options.
<ul> <li>▶ O Active</li> <li>▶ O Completed</li> </ul>	0 Selected	Cear
Preferences •		



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.

Aain Menu	0.1			<b>T A</b>	0.10.01				
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S Training Manace	_				Abel	Penunuri	U_8250_Simulator	Manchester	Ti
					Amy	Jay	U_8306_Simulator		Т
▷ 🥁 WFM					Amy	Reicher	U_8349_Simulator		Т
Configuration Email					Andrew	Faust	U_7004_Simulator		Tr≣
Rew Accounts					Ann	Larson	U_8224_Simulator		Т
Reston					Bandi	Neal	U_8232_Simulator		Т
Cincinnati					Ben	Lin	U_8227_Simulator		т
					Brian	Chen	U_7002_Simulator		Т
					Candi	Stolpe	U_8329_Simulator		т
					Cassandra	Poorman	U_8258_Simulator	Manchester	Т
					Celeste	Mumphrey	U_8230_Simulator		Т
			Ad	d Matches >	Crystal	Ramos	U_8265_Simulator		Т
					Debra	Proctor	U_8262_Simulator	Manchester	Т
					Diana	Olson	U_8241_Simulator	Manchester	ъ
					Eduardo	Garcia	EGarcia	Manchester	Т
					Elenison	Olson	U_8242_Simulator	Manchester	Т
ub Menu					Enej	Pelletier	U_8249_Simulator	Manchester	Т
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<u></u>	1								
🔅 Preferences 👻							< Previous	Next >	Apply

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.

#### Genesys Training Manager Administrator

File View Training Help									
Main Menu	Start Us	er Selection	Training Events	Training Sessions	Completion Status	Statistics			
a 🥪 Training Manag	Jidit Us		Training Events	Training Jessions	Completion Status	JIGUIGUGS			
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Room Activities Skills Skills A	sessor SkillsA	nalysis Patte	em Matchin						Choose
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a 🙈 Manage 🛛 a 📥 First Direct National Bank					Abel	Penunuri	U 8250 Simulator		
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▶ 🥪 WFM					Amy	Reicher	U_8349_Simulator		
> 🔅 Configuration					Andrew	Faust	U_7004_Simulator		
🗌 🏶 New Accounts					Ann Bandi	Larson Neal	U_8224_Simulator U_8232_Simulator		
⊳ 🔲 Reston					Ben	Lin	U_8227_Simulator		
Cincinnati					Brian	Chen	U_7002_Simulator		
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							8265_Simulator	Manchester To Manchester To	
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	Add to	the existing 95 m	atches or Replace	all the existing matches	s in favour of these new m	atches?	8241_Simulator	Manchester T	
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			ioning .	iopideo areanig	Galica		8242_Simulator	Manchester To Manchester To	
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🤕 4 Jul 2011					Gurutej	Kaur	U_8322_Simulator		
Pending Ad					Helena	Peters	U_8254_Simulator		
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					Jennifer	Reppert	U_8268_Simulator		
					Jennifer	Rhoades	U_8270_Simulator	Manchester Te	
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				95	Matches				
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Preferences +							< Previous	Next > Ap	ply Close
; agrificiences ·									

Once OK is selected the users are displayed in the user selection tree. See the example below.

File View Training Help	
Hein View Training Heip         Main Menu <ul> <li>Training Manager</li> <li>Training Requests</li> <li>Training Calendars</li> <li>Training Manager Calendars</li> <li>Training Manager Calendars</li> <li>Training Manager Portal Users</li> <li>WFM</li> <li>Configuration</li> </ul> <li>Sub Menu         <ul> <li>Training Requests</li> <li>Training Requests</li> <li>Training Requests</li> <li>August 2011 - 25 Sep 2011</li> <li>Pending Approval</li> <li>Completed</li> </ul> </li>	Stet       User Selection       Training Events       Training Sessions       Statistics            Orosse from Workforce Management who will be receiving this Training.        Selection       Gebal Exclusions            Deplay Mode         WFM Hierarchical           Orosse           Orosse             Windesito           Windesito           Windesito           Windesito             Windesito           Windesito           Windesito           Windesito             Windesito           Windesito           Windesito           Windesito             Windesito
	95 Selected Cear
Preferences -	< Previous Next > Apply Cancel

There is also the option to remove or add any user to the Global Exclusions list.

File View Training Help								
Main Menu	Start User S	Selection	Training Events	Training Sessions Completion Status Statistics				
🛛 🥪 Training Manager	Juli	Selection	maining Events	Training Jessions Completion status Statistics				
Training Requests	② Choose from Workforce Management who will be receiving this Training.							
Meetings		$\sim$						
⊿ 📲 Resource Calendars	Selection (	Global Exc	lusions					
🚮 Room Calendars		<u> </u>						
Trainer Calendars	Exclusions I	List By	Date					
8 Manager Calendars				🖉 Refresh				
😸 Training Manager Portal Users	D IN	1	F I ID	Exclusion Reason				
⊳ See WEM	First Name		Employee ID					
Configuration	Andrew & Eduardo		U_7004_Simulator EGarcia	Long Term Sick				
	Cualdo	Garcia	Eddicia	Long term block				
Sub Menu								
Training Requests								
4 Jul 2011 - 25 Sep 2011								
<ul> <li>Pending Approval</li> <li>M Active</li> </ul>								
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5 😈 Completed								
	95 Selected			Clear				
				Previous     Next >   Apply       Cancel				
🌼 Preferences 👻				Crrevious INexx > Apply Cancel				

#### **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).

#### Meeting Types

#### Genesys Training Manager Administrator

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		0 Mathinal OK Canool Ore

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.

File View Training H Man Hens Training Manager	Sat Dar Sector Tarry Evens Tarry Season Griphton Satur Satur	
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	Select the proficiency level.	
Sab Meru 		
@ Potences +	8 Marchine) 0 Marchine) 0 M. Carcoli x Previous Red > Acoly	Cear.

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.

File View Training Help											
Main Menu	Start	User Selection	Training	g Events Training Session	Completio	o Statue	Statistics				
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Meetings (2) The selections on all tabs combine t	ogether to app	bly the filtering.			Columns						
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Room Activities Skills Skills As	essor S	killsAnalysis Pa	attern Matc	thin			1			Choo	use
👗 Managi 🦉 Billing		•	Add		First Name		Employee ID	Location	_		
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⊳ 😸 WFM Billing	<	(= ▼ 5	×		Bilbert Jessica	Teska Wallace	U_8339_Simulator U_8355_Simulator		Team 6 Team 6	Re Re	
Configuration					Kim	Lewis	KLewis	Manchester	Team 1	Mo	
					Latashia	Sommers	U_8320_Simulator		Team 5	Re	
					Lyana Macy	Muchow Stay	U_8229_Simulator A02	Manchester	Team 2 Team 5	Mo Re	
					Macy Martha	Wash	A02 A03		Team 5	Re	
					Maylin	Spangler	U_8321_Simulator		Team 5	Re	
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#### **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.

File View Training Help							
Main Menu	Start User Selectio	Training Events	Training Sessions	Completion Status Statistics			
→ Straining Manag	Julii User Jelectio		Haining Sessions				
Training R Selection Filters	Constant Party	the Response of the st	for manipular from				
Meetings Westings Kesource	e together to apply the filtering.			Columns			
	ssessor	Pattern Matching		V Location V Team V Site V Business Unit	- I		
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Manage SkillsAnalysis Sessions and Training	g Plans Clear	🛿 Refresh	n	hirst Na Last Na Employ Int L Yong T Int Site 👝 D			
See Training Manage Training Data Set Tr	aining Data Name # Us	ers					
WFM     Session 1 / Created by 'System     Generation		Septem					
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Session 2 / Created by 'System		Septem					
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Preferences +	-			Previous     Next >   Apply   Cancel			
₩ fieldeik6 ·							

#### **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.

File View Training Help								
Main Menu		Start L	Iser Selection Traini	ng Events	Training Sessions	s Completion Status Statistics		
🖌 🦢 Training Manag	S User Selection Filters	Jotan			Training Sessions			
Training Relation	S User Selection Filters		In Tables Read	and the other	many in he			
Meetings	Ine selections on all tabs combined in the selection of the selection o	e together to apply t	he filtering.			Columns		
A 🖁 🛱 Resource (						V Location V Team V Site V Business Unit		
A Trainer	Activities Skills Skills Asse	or SkillsAnalys	is Pattern Matching		L	Choose		
anag 🔏 🔏				_	-	First Na Last Na Employ 🚊 L 🎆 T 📮 Site 📥 B		
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⊳ 😸 WFM	Team Name le							
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						< Previous Next > Apply Cancel		
Preferences 👻						< Previous Next > Apply Cancel		

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.

File View Training Help			
Main Menu a 🥪 Training Manager	Start User Selection Training Events	Training Sessions Completion Status Statistics	
Training Requests	Create and manage Training Events to spece	ify how you will deliver this Training.	
Meetings ▲ <sup>™</sup> / <sub>1</sub> Resource Calendars ∰ Room Calendars ▲ Trainer Calendars & Manager Calendars	<ul> <li>New Product Training</li> <li>Q Event 1</li> </ul>	Event Details	Include any description
<ul> <li>         ⇒ Training Manager Portal Users      </li> <li>         ⇒ WFM      <li></li></li></ul>	Rename the event		here.
	if required.	Training Manager Portal Contemport	
		Training Category 🕞 Trainer Led	
			URL can be entered here for
			e-Learning.
		Duration (hh:mm) 01:00 Repeat Days 1	
Sub Menu		Duration includes Trainer Lunch Break	
⊿ 🔲 Training Requests		Min. Group Size 0 💭 📝 Schedule Event	
<ul> <li>4 Jul 2011 - 25 Sep 2011</li> <li>Pending Approval</li> </ul>		Max. Group Size 0 🚖 Completion Status	
Active		Costs	
Ompleted		Event Cost 0.00	
🔅 Preferences 🗸		< Previous	Next > Apply Close

- 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.



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.

File Main Menu	Generation Help	
	Duration (hhmm) 01:00 🐑 🗆 Duration includes Repeat Days 1 😓 Min. Group Size 0 😓 Max. Group Size 0	nt
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⊳ ∰ Co	a a transfer Resources	event, click on
	> <u>a</u> London → <u>a</u> Manchester	Save Event to save.
Sub Menu		
a 💷 Tr	🗔 Select All 🗶 Delete 🤣 Refresh 🙀 Export	
	Exceptions Legend	
▶ 0	C K C Some/All Missing	
▷ ①	Master Schedule (0) Scenarios (0)	
	📆 Start Date End Date 🛃 Room Max Seats 🚨 Trainer 🔔 Employee ID # Users # Attended # Completed Created 🙇 Name(s) 🥁 Exception	
	0 ltem(s)	
	Completion Status	ОК
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## **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.

ĺ	Reserved Places (0 = Reset)	X
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Enter the number of places and click 0K. This will show against the location name.

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B&E Warrington 2
🔤 🛃 B&E Warrington 3
🔤 🛃 B&E Warrington 5

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.

Reserved Places (C	) = Reset)	X
	<u> </u>	

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.

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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.

Choose Workforce	🖻 Choose Workforce Schedule(s)						
Choose the Schedule(s)	Choose the Schedule(s) that will be used to search and book						
🔘 Use the Master Scl	nedule						
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Name	Start Date	End Date					
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📃 📰 2010-Weeks33-3	36 <b>&gt;</b>						
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📰 2010-Weeks45-4	18		<u><u>C</u>ancel</u>				
📻 2010-Weeks49-5	52 )		×				

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.

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Ochoose the Schedule(s) where the Event will be booked, and also	o the Rooms and Trainers to host and deliver this Training.	

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.

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#### 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.

Event 1 - [Schedule Event]	
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search	
Workforce Schedule : <a>Kaster Schedule&gt;</a>	
Reserved Places of Reset Cancel	
Ohoose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver this Training.	

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.

File View Training Help	~
Man Menu 😰 Event 1 - [Schedule Event]	23
▲ Went 1         Duration (*h.mm)         01:00 ★         Duration (*h.mm)         01:00 ★         Repeat Days         1 ★         Min. Group Size         0 ★         Max. Group Size         0 ★         Save Event	
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Sub Menu	-
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#### 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

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				Tuesday, 12 June 2012 15:50 GMT (Daylight Savings)	ne Zone 🗐 .:

## **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.

File View Main Menu	Training     Help       Event 1 - [Schedule Event]       Event 1       Duration (rh.mm)       01:00 ·       Resources       Interruptible Activities       Optimised		up Size 🛛 🚖 Max. Group Size 🛛 🖞	E Save Event
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new tem template	save button to create a plate. Any existing s are available for from the drop-down			i

## **Excluding Training Dates**

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

Aldoyn  Start End Enable	Start         End         Enable           07:00         02         19:00         02         19:00           07:00         02         19:00         02         19:00           07:00         02         19:00         02         19:00           07:00         02         19:00         02         19:00           07:00         02         19:00         02         19:00           07:00         02         19:00         02         19:00           07:00         02         19:00         02         19:00           07:00         02         19:00         02         19:00           07:00         02         19:00         02         19:00           07:00         02         19:00         02         19:00	GMT           Stat Date         Time         End Date         Time           18 Jun 2012         07 00         18 Jun 2012         19 00           19 Jun 2012         07 00         19 Jun 2012         19 00           21 Jun 2012         07 00         20 Jun 2012         19 00           21 Jun 2017         19 Jun 2012         19 00           21 Jun 2017         19 Jun 2012         19 00           21 Jun 2014         19 00         24 Jun 2012         19 00           24 Jun 2012         07 00         24 Jun 2012         19 00           25 Jun 2012         07 00         25 Jun 2012         19 00           26 Jun 2012         07 00         25 Jun 2012         19 00	T Build Daries.
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## **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.



### **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.

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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.

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Click Search to retrieve fresh data from WFM.

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.

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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.

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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

#### Genesys Training Manager Administrator

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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.

### Genesys Training Manager Administrator

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# 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.

	41													
Resources Interup	tble Activities    Sc	heduling Options	Optimised	Search	Manual S	iearch								d
Optimized Search Algor	thm Template					1.000			0000					0.000
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Min. Activity Gap At		thu Thu	07:00			19 Jun 2012	07:00	19 Jun 2012	19:00					
Trainer Travel		Fr.	07:00			20 Jun 2012 21 Jun 2012		20 Jun 2012 21 Jun 2012	19:00 19:00					
		Sat	07:00			22 Jun 2012	07:00	22 Jun 2012	19:00					
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Coverage Tolerance	-10 2 %		g Strategy	19:00 101	191	25 Jun 2012	07:00	25 Jun 2012	19:00					
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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 0K, 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



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.

Resources Interuptible Activities Schedule	ng Options Optimised Search Manual S	nual Search 0
Optimised Search Algorithm Template	Working Hours (Local)	Window: 18 Jun 2012 to 30 Jun 2012 Build Dates.
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Min. Activity Gap After (mins)	Thu 07:00 19:00 19:00	20 Jun 2012 07:00 20 Jun 2012 19:00
Trainer Travel	F# 07.00 10 19.00 10 12	21 Jun 2012 07:00 21 Jun 2012 19:00 22 Jun 2012 07:00 22 Jun 2012 19:00
Performance Constraints	Set 07:00 🔄 19:00 🔄 🕅	23 Jun 2012 07:00 23 Jun 2012 19:00
Coverage Tolerance -10 🔄 💈 🛄	Sun 07:00 🔄 19:00 🕁 🕅	24 Jun 2012 07:00 24 Jun 2012 19:00 25 Jun 2012 07:00 25 Jun 2012 19:00
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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.



## **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 KDelete... 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.

	Options Optimised Search Manual	l Search	
Optimised Search Algorithm Template	Working Hours (Local)	Window: 18 Jun 2012 to 30 Jun 2012	Build Dates
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Time & Travel Constraints	Mon 07.00 0 19:00 0 2	GMT	0.0
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Min. Activity Gap After (mins)	Thu 07:00 🔄 19:00 🔄 🗹	20 Jun 2012 07:00 20 Jun 2012 19:00	
Trainer Travel	F# 07:00 10 19:00 10 12	21 Jun 2012 07:00 21 Jun 2012 19:00 22 Jun 2012 07:00 22 Jun 2012 19:00	
Performance Constraints	Sat 07:00 0 19:00 0	23 Jun 2012 07:00 23 Jun 2012 19:00 24 Jun 2012 07:00 24 Jun 2012 19:00	
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sceptions a cx a Masing	sess	ion.	
Master Schedule (16) Scenarios (0)			
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WFM Publish	Marchester R	0	s, Stan Goldman
Training	fron	n the agents schedul	es and keep the
Remove.		-	
Training		· · · ·	
Remove.		ning sessions in Trai	ining Manager.
Tenero Tenero Tenero Tenero Tenero Tenero		ning sessions in Trai	ining 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.

Resources Interuptible Activities Schedul	Ing Options Optimised Search	Manual Search					
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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.

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	A	Training Request	New Product Training (	NPT001											-
	-31	Evert	Event 1					• • • •	1						1.2
		Trainer	Lucy McDonald (ucy)	-		Start Date	H	ighlig	ht the						
		Room	Manchester Room 1			End Date	in	dividu	al and						
	1	In Training Session	- * Bold = Not Saved												
	14	Columna					se	elect Re	emove.						
		[V] Location [V] 1	Team 🕑 Ste 🕑 Busin	ess Unit						2	🕑 Business Unit				
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The agent will then appear in the Completion Status Report as unscheduled.

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Location      First Name     Abel     Amy     Amy     Bandi     Carstandia     Celeste     Crystal     Dehra     Diana	Last N Penunuri Jay Reicher Neal Stolpe Poorman Mumphrey Ramos	Employee ID U_8250_Simulator U_8349_Simulator U_8332_Simulator U_8329_Simulator U_8258_Simulator U_8230_Simulator U_8230_Simulator U_8265_Simulator	Location Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building Modesto Building	Team 3 Team 1 Team 1 Team 3 Team 1 Team 1 Team 3 Team 2 Team 3 Team 3	Modesto Modesto Modesto Modesto Modesto Modesto Modesto	First Direct National Bank First Direct National Bank	Health & Safety Follow Up Health & Safety Follow Up	HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005	Health & Safety Follow Up Health & Safety Follow Up	Event 1 Event 1 Event 1 Event 1 Event 1 Event 1 Event 1 Event 1 Event 1	2 2 2 1 2 1 2 2 1 2 2 2 2 2 2 2 2 2 2 2
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Location      First Name     Abel     Abel     Amy     Amy     Bandi     Cassandra     Celeste     Cystal     Debra     Diana     Diana     Diana     Eduardo     Elenison	Last N Penunuri Jay Reicher Neal Stolpe Poorman Mumphrey Ramos Proctor Olson Clarkson Garcia Olson	Employee ID U_8220_Simulator U_8306_Simulator U_8324_Simulator U_8232_Simulator U_8228_Simulator U_8226_Simulator U_8226_Simulator U_8241_Simulator U_8241_Simulator U_8242_Simulator U_8242_Simulator	Location Modesto Building Modesto Building	Team 3 Team 1 Team 1 Team 1 Team 1 Team 1 Team 2 Team 3 Team 2 Team 3 Team 2 Team 1 Team 1 Team 2 Team 1 Team 2 Team 3	Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto	First Direct National Bank First Direct National Bank	Health & Safety Follow Up Health & Safety Follow Up	HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005 HS005	Health & Safety Follow Up Health & Safety Follow Up	Event 1 Event 1	nt 9 2 2 2 1 2 2 1 2 2 2 2 2 1 1 2 2 2 2 2

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.

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To re-run the Scheduler, select Search; the Scheduler will schedule any unscheduled agents for further training sessions, taking the original constraints into account.

	Algorithm Template		Working Hours	s (Local)	Window : 18 J	lun 2012 to 3	30 Jun 2012			В	Build Dates.
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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.

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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 0K.

Eve Training Session		
Durat		
Training Request	New Product Training (NPT001)	
Event	Event 1	
Trainer	Rachel O'Neill (rachel)	Start Date 03 Oct 2011 💷 17:30 😓
Room	Location 1 Room 1	Choose Room
In Training Session - *	Bold = Not Saved	View Active Rooms     View Inactive Rooms
Columns	am 👿 Site 👿 Business Unit	View Active Hooms     View Inactive Hooms     Internal     A O Location>     London
First Name Last Name Army Reicher Monica Perez	U_8349_Simulator Manchester Team 3 U_8253_Simulator Manchester Team 3	Manchester Andream And
Robert Rice	U_8272_Simulator Manchester Team 3	Me Location 1 Noom 2 Location 1 Room 3 External An
0		After selecting an
Sel		alternative room, click
Exce		0K. Mo Mo Mo
Mas		Mo anchester ream 2 Mo anchester Team 3 Mo anchester Team 3 Mo
Eve 3		OK Cancel Inchester Team 1 Mo Inchester Team 3 Mo Manchester Team 1 Mo
<b><i>i</i></b>	m	Ian Johnson U_6008_Simulator Manchester Team 1 Mo      Instruction U_6008_Simulator Manchester Team 1 Mo      Instruction U_6008_Simulator Manchester Team 1 Mo
Item X Delete		Publish automatically to WFM 🔲 OK Cancel
Ready		Wednesday, 14 September 2011 15:55

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.

Scheduler					Error due to conflict.	room
Vent Details	New Product Launc	h	Training Plan: New Product Launch	Training Window	02 Dec 2008 💉 to	24 Dec 2008 💌
Duration (hh:mm)	📰 Training Sess	ion	/			Save
Training Time Slots	Event:	Training	Session			Activities
Resources Optin	Training Plan:	$\mathbf{\Lambda}$	Sorry, there was a problem committing this Training Session	n.		~
Workforce Scheo			Clashing Room: 2 Dec 2008 09:00 to 2 Dec 2008 10:00 - B&E Warrington 2 already booked for 'Meeting'		P	
	Start Date:		bac manington 2 aready booked for meeting			er Care
	In Training Sess					counts
	First Name				D	Set
	🌌 Candi 🗐 Enej				nulator mulator	
	🗳 Guadalupe				nulator	
	💐 Jennifer 💐 Kerry				nulator nulator	
	🖷 Linda				nulator	Meal
	🤎 Muhammed Fo				nulator nulator	
raining Sessions-	🖷 Sandra 🛒 Tiffany				mulator	
🗔 🗙   🖉	Tirrany				nulator nulator	
😁 Start Date					nulator mulator	
72 Dec 2008 09 2 Dec 2008 09					nulator	
🦷 2 Dec 2008 10					nulator	
7 2 Dec 2008 10 2 Dec 2008 11					🤜 nulator	
🦷 2 Dec 2008 11				<u></u> K	mulator	
7 2 Dec 2008 12 2 Dec 2008 13						
🦷 3 Dec 2008 09			Commit automatically to	Genesys 7.5 🔽 🚺	<u>OK</u> <u>C</u> ancel	
Completion Stat	tus					

# 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.

Event 1         Duration (nh.mm)         01-00         Duration includes         Repeat Days         1 (+)         Min. Group Size         3 (+)         Max. Group Size         10 (+)         Save Event
Duration (hh.mm) 01:00 👘 🗇 Duration includes Repeat Days 1 👘 Min. Group Size 3 👘 Max. Group Size 10 👘 📓 Save Event
Training Time Slots
Resources Interruptible Activities Optimised Search Manual Search
Workforce Schedule
a and a set and
- 교행 Location 1 Room 1 - 교행 Location 1 Room 2
- 🗹 🚨 Daniel Oliver
🖂 🛛 🤷 Rachel O'Neill
(i) Choose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver this Training.
🗔 Select All 💥 Delete 👸 Refresh 🔒 Export
Exceptions Legend
🕼 OK 🗳 Some/All Mesing
Master Schedule (0) Scenarios (0)
📆 Start Date End Date 🛃 Room Max Seats 💄 Trainer 🔔 Employee ID # Users # Attended # Completed Created 🧟 Name(s) 🗛 Exception
0 ltem(s)
Completion Status
😹 + Ready Wednesday, 14 September 2011 15:59 🏉

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.

	ng Options Optimised Search Manual S	iearch	
Optimized Search Algorithm Template	Western David and	Window : 18 Jun 2012 to 30 Jun 2012	Build Dotes
Al days 👻 🛃 🗶	Working Hours (Local) Start End Enable	Window ; 18 Jun 2012 to 30 Jun 2012	DURG LARDS.
Time & Travel Constraints	Man 07:00 101 19:00 101	GMT GMT	0.0
Transtion Time (mins) 0	Tue 07:00 10 19:00 10	Stat Date Time End Date Time	1
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Min. Activity Gap After (mina)	Thu 07:00 (a) 19:00 (a)	19 Jun 2012 07:00 19 Jun 2012 19:00	
Trainer Travel	Fit 07:00 10 19:00 10	20 Jun 2012 07:00 20 Jun 2012 19:00 21 Jun 2012 07:00 21 Jun 2012 19:00	
	Sat 07.00 10 19:00 10 12	22 Jun 2012 07:00 22 Jun 2012 19:00	
Performance Constraints	Sun 07:00 et 19:00 et 🗹	23 Jun 2012 07:00 23 Jun 2012 19:00 24 Jun 2012 07:00 24 Jun 2012 19:00	
Coverage Tolerance	Booking Strategy	25 Jun 2012 07:00 25 Jun 2012 19:00	
Coverage Target Site (Forecast) •	Front Load (Maximise Group Size)	26 Jun 2012 07:00 26 Jun 2012 19:00 27 Jun 2012 07:00 27 Jun 2012 19:00	
		28 Jun 2012 07:00 28 Jun 2012 19:00	
Define templates to control the behaviour of the C	ptimised Search algorithm.	29 Jun 2012 07:00 29 Jun 2012 19:00 30 Jun 2012 07:00 30 Jun 2012 19:00	
🗔 Select All 💢 Delete 🧭 Refresh 🛃 Export			Retrieve fresh data from WFM 📝 Search 🔿
्र Select All 🗶 Delete 🔗 Refresh 🛃 Export Exceptions 😭 OK 🗳 Maxing			Potneve mean data mon winning
The second s			
Exceptions CX Missing Master Schedule (0) Scenarios (16)	m Seats 🜲 Trainer Employee ID # Users	# Attended # Completed Created 🤱 Namelij)	
Exceptions CX Missing Master Schedule (0) Scenarios (16)		#Atended #Completed Created & Names) e Scenario tab	
Exceptions CX Missing Master Schedule (0) Scenarios (16)	Click on the	e Scenario tab	
Exceptions of ox of Maxing Matter Schedule (0) Scenaros (16) Simo Status Stat Date End Date St Roo Nem(s)		e Scenario tab	
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Exceptions of ox of Maxing Matter Schedule (0) Scenaros (16) Simo Status Stat Date End Date St Roo Nem(s)	Click on the to view the	e Scenario tab training ten scheduling	

Below is an example of training sessions visible in the Scenarios tab.

Build Dates
d 9
Tracy Neal
Tracy Neal Tracy Neal , Stan Goldma
Tracy Neal Tracy Neal n, Stan Goldma n, Stan Goldma
Tracy Neal Tracy Neal n, Stan Goldma n, Stan Goldma ii, Yishan McNa
Tracy Neal Tracy Neal n, Stan Goldma n, Stan Goldma
Tracy Neal Tracy Neal n, Stan Goldma n, Stan Goldma ii, Yishan McNa
. Tracy Neal . Tracy Neal n. Stan Goldma n. Stan Goldma i, Yishan McNa i, Yishan McNa
Tracy Neal Tracy Neal n, Stan Goldma n, Stan Goldma ii, Yishan McNa
. Tracy Neal . Tracy Neal n. Stan Goldma n. Stan Goldma i, Yishan McNa i, Yishan McNa
. Tracy Neal . Tracy Neal n, Stan Goldma n, Stan Goldma i, Yishan McNa i, Yishan McNa

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

Statistics for t	60 80 100 100	Overall Scheduled 88.7%	# Sche # Unsc	eduled cheduled		86	_					
Training Sess												
Enable [	Date Filter Date 07 Sep	2011	End Date 21 Sep	2011	_							
		2011 🔲 – E	and Date 21 Set	p 2011 🔲	~							
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Columns												
	n 📝 Team	✓ Site ✓ Busi	ness Unit									
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Location     First Name     Abel	Last Na Penunuri	Employee ID U_8250_Simulator	Location Manchester	Team 3	Modesto	First Direct National Bank	New Product Training	NPT001	Event 1	11 Oct 2011 17:30	11 Oct 2011 18:30	
Location First Name Abel Amy	Last Na Penunuri Reicher	Employee ID U_8250_Simulator U_8349_Simulator	Location Manchester Manchester	Team 3 Team 3	Modesto Modesto	First Direct National Bank First Direct National Bank	New Product Training New Product Training	NPT001 NPT001	Event 1 Event 1	11 Oct 2011 17:30 20 Oct 2011 17:30	11 Oct 2011 18:30 20 Oct 2011 18:30	
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Location     First Name     Abel     Amy     Amy     Amy     Amy     Andrew     Ann     Bandi     Ben     Ban     Candi	Last Na Penunuri Reicher Jay Faust Larson Neal Lin Chen Stolpe	Employee ID U_8250_Simulator U_8349_Simulator U_7004_Simulator U_8224_Simulator U_8224_Simulator U_8222_Simulator U_8222_Simulator U_7002_Simulator U_8329_Simulator	Location Manchester Manchester Manchester Manchester Manchester Manchester Manchester Manchester Manchester	Team 3 Team 3 Team 1 Team 1 Team 1 Team 1 Team 1 Team 1 Team 1 Team 1	Modesto Modesto Modesto Modesto Modesto Modesto Modesto Modesto	First Direct National Bank First Direct National Bank	New Product Training New Product Training	NPT001 NPT001 NPT001 NPT001 NPT001 NPT001 NPT001 NPT001 NPT001	Event 1 Event 1 Event 1 Event 1 Event 1 Event 1 Event 1 Event 1 Event 1 Event 1	11 Oct 2011 17:30 20 Oct 2011 17:30 2 Oct 2011 17:30 2 Oct 2011 17:30 12 Oct 2011 17:30 3 Oct 2011 17:05 1 Oct 2011 17:00 11 Oct 2011 17:00 11 Oct 2011 17:30	11 Oct 2011 18:30 20 Oct 2011 18:30 2 Oct 2011 18:30 2 Oct 2011 18:30 12 Oct 2011 18:30 3 Oct 2011 18:00 1 Oct 2011 18:00 11 Oct 2011 11:30 11 Oct 2011 11:30	
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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 rightclick 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.

Optimised Search Algorithm Template	Working Hours (Local)	Window: 18 Jun 2012 to 30 Jun 2012 Build De
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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.

	Working H	lours (Local)	0	Window: 18	Jun 2012	to 30 Jun 20	112					Build Dates
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Click the Master Schedule tab to view the training sessions.

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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.

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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.



### Genesys Training Manager Administrator

Wolforce Schedule	2012 June												
	vter (20 Reserved Place anchester Room 1 anchester Room 2 aniel Oliver ucy McDonald achel O'Neill	8)		<ul> <li>Use the</li> <li>Use a S</li> </ul>	redule(s) Schedule(s) Hust w Master Schedule cenario or multiple Start Date	Scenarios	arch and book		z				
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You must also delete any training session on the Scenarios tab.

Resources Interruptible Activities Schedul Wolfsnore Schedule : CMaster Schedulez: * # Resources +London 	ing Options Optimised Search Manual	Search				0 P
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## **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.

Duration (hh.mm)     01:00 x     Image: Duration Includes     Repeat Days     1 x     Min. Group Size     3 x     Max. Group Size     10 x
Training Time Slots     Resources     Interruptible Activities     Scheduling Options     Optimised Search     Manual Search       Start Date     (a) 14 Sep 2011     (b) (b) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c
Start Time Set # Available () Clock sufficient in the list to see the Performance Data during that slot.
Specify the date to
search.
Search → Ind slots manually for Training delivery. Manual searches ignore all Time & Travel Constraints, Performance Constraints and Trainer working hours.
🔆 🗔 Select All 🔀 Delete 🖉 Refresh 🔛 Export
Exceptions Legend  C (and Master)  C (Some/All Missing in Master)  C Some/All Missing (and Master)  Master Schedule (16)  Scenarios (0)
📆 Start Date End Date Scenario 🛃 Room Max. Seats 🚨 Trainer 🧟 Employee ID # Users # Attended # Completed Created 🙇 Name(s) 🧕 Exception
0 item(s)
Completion Status
🥪 ▼ Ready Wednesday, 14 September 2011 2047 🍠

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.

Event 1	_
Duration (nh.mm) 01:00 📩 🗈 Duration includes Trainer Lunch Break Repeat Days 1 🚔 Min. Group Size 3 🚔 Max. Group Size 10 🖨 📓 Save Event	
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● 11/49 L249 4 ● 12/20 13/00 5 ● 11/100 11/15 11/30	
Show All Search ⇒ Chart Type : Calculated ▼	
Find slots manually for Training delivery. Manual searches ignore all Time & Travel Constraints, Performance Constraints and Trainer working hours.	
🖓 OK (and Master) 💞 OK (Some/All Missing in Master) 🗳 Some/All Missing (and Master) 🗳 Some/All Missing (Master OK)	
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Export	

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.

vent Details Name :	New Product Launch	Training Plan: Net	w Product Launch	Trainin	ng Window 02 Dec 2008 💉	to 24 Dec 2008 💌
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	⊂ Details					
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To include a trainer and / or a room, use the Trainer or Room selection icon.



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

Training Session						
Details						
Event: New Product Launch		Room:	B&B	E Warrington 2		
Training Plan: New Product Launch		Trainer:		-		
Start Date: 2 Dec 2008 02:00		End Date:	2 D	ec 2008 03:00		
In Training Session - * Bold = Not Saved				Not In Training Session		
First Name   Last Name   Employee ID		]		First Name	Last N	Employee ID 🛛 🔺
🐣 Enej Pelletier U_8249_Simula	tor			🐣 Abel	Penunuri	U_8250_Simulator
📇 Kim Lewis KLewis				📇 Amy	Jay	U_8306_Simulator
🛛 🐣 Linda Perez 🛛 U_8252_Simula	tor			📇 Amy	Reicher	U_8349_Simulator
🛛 🐣 Lydia Ramirez U_8264_Simula	tor			📇 Andrew	Faust	U_7004_Simulator
🔄 🐣 Lynne Suzanne U_8304_Simula	tor			📇 Ann	Larson	U_8224_Simulator
🛛 🐣 Sherry Lynn 🛛 U_8305_Simula	tor			📇 Bandi	Neal	U_8232_Simulator
🛛 📇 Stan Goldman U_6006_Simula	tor			📇 Ben	Lin	U_8227_Simulator
			_	📇 Brian	Chen	U_7002_Simulator
		< Add		📇 Candi	Stolpe	U_8329_Simulator
		Remove >		📇 Cassandra	Poorman	U_8258_Simulator
				📇 Celeste	Mumphrey	U_8230_Simulator
				📇 Crystal	Ramos	U_8265_Simulator
			_	🐣 Debra	Proctor	U_8262_Simulator
Training Plan:       New Product Launch       Trainer:       Alyson Bushel         Start Date:       2 Dec 2008 02:00       End Date:       2 Dec 2008 03:00         In Training Session - *Bold = Not Saved       Not In Training Session       Not In Training Session         First Name       Last Name       Employee ID       Add         Eneig       Pelletier       U_8249_Simulator       Anny       Jay         Linda       Perez       U_8252_Simulator       Anny       Bandi       Neal       U_8230_Simulator         Lydia       Ramirez       U_8305_Simulator       Ann       Larson       U_8227_Simulator         Sherry       Lynn       U_8305_Simulator       Bandi       Neal       U_8227_Simulator         Stan       Goldman       U_6006_Simulator       Bandi       Neal       U_8227_Simulator         Candi       Stolpe       U_8230_Simulator       Bandi       Neal       U_8230_Simulator         Conce completed, click 0K.       Once completed, click 0K.       Diana       Olson       U_824_Simulator			U_8241_Simulator			
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					Olson	
				📇 Fertisha	Ramero	U_8285_Simulator 🧹
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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.

Name   Training Meager   Status   Training Meager   Training Meager   Training Meager   Tra	File View Training Help		
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## **Create Meetings**

To create a meeting, select Meetings from the Main Menu. This is the same process that is used for creating team meetings, team huddles, and one-to-ones.



A list of the locations will appear in the Sub Menu. The view can be changed from View by Location to View by Manager by right-clicking on Meetings in the Sub Menu.

#### Different view options.

File View Training Help	
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· Featy	Wedresday, 14 September 2011 21 01 47

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.).

File View Training Help											
Main Menu	Meeti	ng Filters									
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Sub Menu											
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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.

Start User Selection	Meeting Scheduler Workforce Management	d D
Enter various descriptive	ve and key information about this Meeting.	
Main Title Meeting Type Description & Objectives	<new meeting=""></new>	Enter a main title and use the drop-down list to select the correct meeting type. Enter a mandatory description.
Manager If this	Approval	ne manager from the drop-down box will list all of the managers red in Training Manager.
template is to be used each month, then select Active to publish directly into WFM.	12 Jun 2012   End Date  12 Jun 2012  This time range apples to every day in the above Date range.  01:00  Select the duration for the meeting.	Select the Start and End Date and if this template is to be used each month, the date/time frame selected here will be the span of time used in the future.
		Apply to save and Next to move to the next tab.
		< Previous Next > Apply Cancel

- 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.

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		Oncose the Schedule(s) where the Meeting(s) will be booked, and also the Rooms and Managers.
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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.

Resources	Interruptible Activities	Optimised Searc	h Manual Search	
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Activity —				
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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.

Constraints	Recurrence
Time Constraints         Min. Activity Gap Before (mins)         Min. Activity Gap After (mins)         O         Min. Gap Between Sessions (days)         O         Min. Gap Between Sessions (days)         O         Performance Constraints         Coverage Tolerance         Q         Coverage Target         Activity (Forecast)         Attendance Constraints         Min. % of Attendees Required         20         Booking Strategy         Randomly Distribute	<ul> <li>Active</li> <li>Daily I Monday I Tuesday V Wednesday</li> <li>Weekly I Thursday V Friday V Saturday</li> <li>Monthly I Sunday</li> <li>A recurrence pattern set to Monthly will try to book a meeting once a month on any of the days that are ticked between the Start Date and End Date.</li> </ul>
	Retrieve fresh data from WFM 📝



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.

File View Training Help	
Main Menu	Start User Selection Meeting Scheduler Workforce Management
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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.

#### Genesys Training Manager Administrator



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	Brian	Chen	U 7002 Simulator	Manchester	Team 1	Modesto	First Direct National Bank	New Team Meeting					
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	Shane	Carlson	U_6007_Simulator	Manchester	Team 1	Modesto	First Direct National Bank	New Team Meeting					
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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.

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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.

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Training Manager     Training Requests     Meetings	Bait         User Selection         Modeling Scheduler         Workforce Management           60         Here all Meetings and gendrom-calcule with Highforce Management
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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	Meeting	g Filters										
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⊳ See WFM	Or	nly show items without	Next Dates									
Configuration     Section     Training Manager	: 🐑 Ne	w Meeting 🗔 Che	ck All 💥 Dele	te 🖉	Refresh 🚳 N	ext Dates 🔳 Opt	imised Searc	hes				
Training Categories		Main Title	Туре			Employee ID			End Date	Next Start Date	Next End Date	D
Meeting Types		New Team Meeting				charlie Employee ID	Team 1		30 Sep 2011 22:00	Next Start Date	Next End Date	6
<ul> <li>Ecoking Categories</li> <li>Selection &amp; Exclusion</li> <li>a is Resources</li> <li>Training Manager Portal</li> <li>Skills Assessor</li> </ul>		Team Meeting	Team Meeting			charlie	Team 2		30 Sep 2011 22:00			61
Sub Menu												
<ul> <li>✓ Viewing by Location</li> <li>✓ Viewing by Location</li> <li>▲ <pre>Alocation&gt;</pre> <li>▲ London</li> <li>▲ Manchester</li> <li>▲ Charlie White</li> <li>▲ Oliver Wilson</li> </li></ul>					m							
											🛃 Exp	ort
Preferences 🗸	2 Item(s)											on

### **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.

File View Training Help														
Man Menu	Meeting Pitters													
Imining Manager     Imining Requests	13 Endie Status Filer													
Meetings     JI Resource Calendars	E Endle Type filter													
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🖌 🦢 Training Manager	New Meeting 🙄 Overk All 💢 Delete 🖉 Refresh 🍈 Next Dutes 📰 Optimised Searches													
Training Categories	Status Nam Tite		a Manager	Employee D	60 Teat	Stat Date	End Date	Ned Shart Date	Next End Date	Ð				
<ul> <li>Booling Categories</li> <li>Biolector &amp; Exclusion</li> <li>2 12 Resources</li> <li>Training Manager Partal</li> <li>Skills Jasseson</li> </ul>	C 0 Team & Edit Meet A Foreire 1 Depicate Team Meet Team Meet Team Meet Colored X Extension	Nating .	Duris When	chafe	Team 2	1.5+e 2011.08.00	30 Sec 2011 22:30			8				
Sub Menings w Seeing by Location iii Stewing by Location iii Codes iii Londes During things														
Diver Wilson	×								id for	1				
G Preferences -	2 Itomiti													

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.

Mata Maass	Meeting Filters									
Main Menu	Meeting Filters									
⊿ Sector Sec	Enable Status Filter				*					
Meetings	Enable Type Filter				-					
A the Resource Calendars     Room Calendars     Room Calendars     A Trainer Calendars     Manager Calendars     Training Manager Portal Users     WFM     WFM     WFM	Show items needing critical atter Show items needing attention so Show items needing no attention Only show items without Next Da	n 10 🜩	days w	aming (Only app	lies to Meetings with F lies to Meetings with F	Recurrence)				
Training Manager Training Categories	🎦 New Meeting 🗔 Check All			.0.						
Meeting Types	Status Main Title	Туре					Start Date	End Date	Next Start Date	Next End
Booking Categories	Copy of New Team Meeting			Charlie White	charlie	Team 2		30 Sep 2011 22:00		
A Selection & Exclusion	V III New Team Meeting	Team Meeting Team Meeting		Charlie White	charlie charlie	Team 1 Team 2		30 Sep 2011 22:00 30 Sep 2011 22:00		
▷ mesources	ream weeting	reall weeking	ACTIVE	Cridile Write	Criano	realit 2	1.360 2011 00.00	30 360 2011 20100		
Service Training Manager Portal										
ills Assessor										
Sub Menu										
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Manchester										
& Charlie White										
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The main title can be changed by either double-clicking the main title team name, or by rightclicking and selecting Edit Meeting from the available menu options.

😸 Training Manager	
Eile View Iraining Help	
Main Menu	Meeting Filters
Training Manager     Training Requests	Enable Status Filter
Heetings     Besources     Gescurces     Gescurces     Gescurces     Gescurces	Enable Type Filter
😑 🥪 Training Manager Portal	🗹 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)
WFM	Show items needing no attention
😑 🍓 Configuration	Only show items without Next Dates
🖃 🛬 Training Manager	
Training Categories     Meeting Types	Select All 💥 Delete 🖉 Refresh 🦓 Next Dates 🛒 Optimised Searches
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	P Zeam 1 Tea 30 Monthly (Tue, Wed, 1
Rooms     Trainers	ug 2010 22:00 30 Monthly [Mon. Tues
Managers 🗸	Image: Second
Sub Menu	Copy of Team 1 Tea Team Meeting Active Team 3 3Aug 2010 09:00 2 Sep 2010 22:00 30 Monthly (Tue, Ved, 1
😑 🔝 Meetings	
ie → WFM ie ▲ First Direct National Bank	
Brist Direct National Bank     Brist Direct National Bank	
- 🃸 Team 1	
Team 2	
ean s ⊛ ⊒ Reston	
🗉 🔲 Cincinnati	
	🛃 Export
References -	5 Item(s)

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.

😸 Training Manager		_ 8 🗙
Eile View Training Help		
Main Menu	Meeting Filters	
Main Menu Training Manager Training Requests Training Resources Scheduler Training Manager Potal Users WFM Configuration Schedular Training Categories WFM Training Categories WFM Training Categories WFM	Enable Status Filter  Enable Type Filter  Show items needing critical attention  Galax warning (Only applies to Meetings with Recurrence)  Show items needing no attention  Only show items without Next Dates  Refresh @ Next Dates @ Refresh  Next Dates  Optimised Searches	
Booking Categories	Status Main Title Type Status 🚓 Team Start Date End Date Next Start Date Duration (Minutes)	Recurrence
E Cources	Team 1 Team Meeting Team Meeting Active Team 1 3Aug 2010 09:00 2 Sep 2010 22:00 30	Monthly (Tue,Wed,1
Rooms	A Team 1 One to One One To One Active Team 1 10 Jul 2010 08:00 9 Aug 2010 22:00 30	Monthly (Mon, Tue, V
Trainers     Managers	Team 2 1 A Meeting Scheduler Options	Monthly (Mon, Tue, V
malayeis	Team 20 Team 20 30	Monthly (Mon, Tue, V
Sub Menu	V Regna Treama T	Monthly (Tue,Wed,1
<ul> <li>■ Meetings</li> <li>● WH</li> <li>● ■ First Direct National Bank</li> <li>● ■ Modestoi</li> <li>● ■ Team 1</li> <li>● ■ Team 2</li> <li>● ■ Peaton</li> <li>● ■ Reston</li> <li>● ■ Cincinnati</li> </ul>	Important Note: If you do not tick this option, then Coverage Tolerances may not be     respected. This is because unpublished Meeting Sessions will not keep Coverage Data in     WFM upto-date, and could result in bookings which violate the desired Coverage     DK Cancel	Export
Preferences -	5 Item(s)	

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.

Tooltip	Start Date	End Date	Room	Max. Seat	Manager	Employee ID	# Users	Name(s)	Exception
	)							Ann Larson, Bandi Neal, Candi Stolpe, Eduardo Garcia,	
Exceptions are OK	1							Gurutej Kaur, Joan Stuart, Kim Lewis, Nicole Stutts, Pele	
in Genesys WFM.	28/05/2010 12:30	28/05/2010 13:30	<none></none>		Gordon Bens	first_manager		Lolani	Team Meeting
	1							Amy Jay, Dick Clarkson, Ian Johnson, Kai Lemieux, Lynne	
Exceptions are OK	/							Suzanne, Mary Gail, Nicole Stutts, Shane Carlson, Tianni	
in Genesys WFM.	09/06/2010 12:00	09/06/2010 13:00	<none></none>		Gordon Bens	first_manager	9	Ayala	Team Meeting

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.

😸 Training Manager	
Eile View Training Help	
Main Menu	Meeting Filters
Image of the second	
i 🌼 Preferences 👻	5 Item(s)

The new suggested dates will then appear under Next Start Date and Next End Date.

🥃 Training Manager											_ = X
File View Training Help											
Main Menu	[	~ Meeting	Filters								
Iraining Manager     Training Requests     Monomial Manager Potal     Training Requests     With Manager Potal     Users     With     Users     Users     Users     Training Manager     Users Selection     Users     Training Manager     Training Manager		<ul> <li>□ Ena</li> <li>✓ Sho</li> <li>✓ Sho</li> <li>✓ Sho</li> <li>✓ Sho</li> </ul>	able Status Filter able Type Filter ow items needing critical ow items needing attentic ow items needing no atte ly show items without Ne	n soon 10 ntion xt Dates	a da	ys warning (D	nly applies to Meetin nly applies to Meetin	igs with Recurrence			
Sub Menu Sub Me	V		Team 2 Team meeting	Type Team Meeting One To One Team Meeting One To One	Status Active Active Active Active	Cam Team Team 1 Team 1 Team 1 Team 1	Start Date 3 Aug 2010 09:00 10 Jul 2010 08:00 10 Jul 2010 09:00 10 Jul 2010 08:00	End Date 2 Sep 2010 22:00 9 Aug 2010 22:00 9 Aug 2010 22:00 9 Aug 2010 22:00	Next Start Date 3 Sep 2010 09:00 2 Sep 2010 09:00	30 30 30	Recurrence Monthly (Tue, W Monthly (Mon, Ti Monthly (Mon, Ti Monthly (Tue, W Monthly (Tue, W
Preferences -		F Thom ( - )								 	Export
		5 Item(s)									

If the meeting dates suggested are correct, select Next Date again, and then select the option Apply Next Dates for all selected Meetings.

😂 Training Manager	
Ele Yiew Iraining Help	
Main Menu	Meeting Filters
Main Menu  Training Manager  Training Requets  Training Manager Portal  Training Manager Portal  Training Manager Portal  Exception Types User Selection  Exception Types User Selection  Sub Menu  Meeting Training Categories  Training Categories  Training Manager  Training Categories  Frestories  Frestories  Frestories  WrEM  Frestories  Fre	Enable Status Filter Show items needing critical attention Show items needing outerhion Only show items without Next Dates New Meeting New Meet
: Preferences -	Export
: Werenerences *	5 Item(s)

The new dates will now replace the previous dates under Start Date and End Date.

Training Manager													
File View Training Help													_ 7 🔀
Main Menu		Meeting	Filters										
Training Manager     Training Manager     Training Requests     Training Manager Portal     Training Manager Portal     Users     WFM     Seconces     Training Manager Portal     Society Portal     Training Manager Portal     Training Manager Portal     Training Manager Portal     Society Portal     Training Manager Portal     Training Manager Portal     Training Manager Portal     Society Portal     Training Manager Portal     Training Mana		En Shu Shu Shu Shu Shu Shu Shu Shu Shu Shu	able Status Filter able Type Filter ow items needing critical ow items needing attentio ow items needing no atte ly show items without Ne v Meeting Select All Main Tile Team 1 Team meeting Team 1 One to One Team 2 Team meeting	n soon 10 ntion xt Dates X Delete / Type Team Meeting One To One	<ul> <li>Refres</li> <li>Status</li> <li>Active</li> <li>Active</li> </ul>	ys wann ing ha ())≥ Ne (2) Me Team 1 Team 1 Team 1	ng (Only ext Dates Team S	applies to Meetin I Optimise tari Date Sep 2010 09:00 Totol 2910 08:00	I Searches	)	Next End Date	Duration (Minutes) 30 30	Recurrence Monthly (Tue Wed, 1 Monthly (Mon, Tue V
Managers	~		Team 2 One to One	One To One	Active	Team 1	10	) Jul 2010 08:00	9 Aug 2010 22:00			30	Monthly (Mon, Tue, V
Sub Menu WFM Site VFM Modesto Modesto First Direct National Bank. Modesto Modesto Care 1 Site State First Direct National Bank. Site State State First Direct National Bank. First Direct Na		<	Team 3 Team meeting	Team Meeting	Active	Team 3		Sep 2010 09:00	2 Oct 2010 22:00	>		30	Monthly [Tue,Wed.]
													🛃 Export
🔅 🎲 Preferences 👻		5 Item(s)											

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.

😸 Training Manager	
Elle View Training Help	
Main Menu	Meeting Filters
I Training Manager     Training Requests     Training Requests     Meetings     Secondary     Training Manager Fortal     Users     VFM     Exception Types     User Selection     WFM     Meeting Types     Booking Categories     Managers     Training Manager     Training Manager     Training Manager     Training Manager     Training Manager     Meeting Types     Booking Categories     Meeting     First Direct National Bank     Meeting     First Direct National Bank     Meeting     First Direct National Bank     First Direct Natinal Bank     First D	
Preferences +	5 Item(s)

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.

File View Training Help	$\frown$
Main Menu	Start User Selection Meeting Scheduler Workforce Management
🔺 🦢 Training Manager	
Training Requests	② Choose Rooms, Interruptible Activities, set up constraints, recurrence options and perform the search.
Meetings	
a 📲 🕷 Resource Calendars	Resources Interruptible Activities Optimised Search (Manual Search )
🛒 Room Calendars	Workforce Schedule : <a href="https://www.www.schedule">www.www.schedule</a>
🚨 Trainer Calendars	Workforce Schedule : < Master Schedule>
B Manager Calendars	
🥁 Training Manager Portal Users	Wew Active Rooms     O View Inactive Rooms
⊳ 🥪 WFM	Internal     Internal
Configuration	External
a 🥁 Training Manager	
Training Categories	
Meeting Types	
Booking Categories	
Selection & Exclusion	
⊳ <sup>आ ध</sup> Resources	
S Training Manager Portal	
Skills Assessor	
Sub Menu	
Meetings	
Viewing by Location	
No Location>	
▶ London	
Manchester	
Charlie White	
a Oliver Wilson	
	Occose the Schedule(s) where the Meeting(s) will be booked, and also the Rooms and Managers.
Preferences 🗸	< Previous Next > Apply Close

After selecting the date, click Search to reveal the number of available agents by time slot.

Choose R	ooms, In	terruptible Activities,	set up con	nstraints, recurrence options and perform the search.	
Resources	In	terruptible Activities	Optim	mised Search Manual Search	
Start Date :	-	14 Sep 2011 🔲 🔻	-	Performance Data	
Start Time	End	# Available	*	② Click a slot in the list to see the Performance Data during that slot.	
Wednesd	lay, 14 S	eptember 2011 —	- 11		
	01:00	1			
00:15	01:15	2	=		
00:30	01:30	2	=		
00:45	01:45	1			
01:00	02:00				
01:15	02:15	1			
01:30					
01:45 🕕	02:45	2			
02:00	03:00				
02:15	03:15	2			
02:30	03:30	1			
02:45	03:45	1			
03:00	04:00				
03:15	04:15	1			
03:30	04:30	1			
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04:00	05:00	2			
04:15	05:15	2			
04:30	05:30	2			
04:45 🕕	05:45	2			
05:00	06:00				
05:15	06:15	2			
05:30	06:30				
05:45 🕕	06:45				
	07-00		-		
Show /	All	Sear	ch ⇒		
🕜 Find s	lots man	ually. Manual seard	hes ignore	all constraints and Manager working hours.	

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.

n	Details Meeting	Г													
	Meeting	l	New Team Meeting												
	Manager	[	<none></none>			Start Date		14 Sep 2011	04:15 🚔						
	Room	[	<none></none>			End Date		14 Sep 2011	05:15 🚔						
	In Meeting - *	Bold = Ne	ot Saved						Not In Meeting						
	Columns								Columns						
		🔽 Team	🛛 🔽 Site 🔽 Business	s Unit						🔽 Team	🔽 Site 👿 Busin	ess Unit			
	First Name	Last Name	e Employee ID	Location	📸 Team	🔲 Site		🔛 < Export	First Name	Last Name	Employee ID	Location	📸 Team	🔲 Site	📥 Bi
	Ben	Lin	U_8227_Simulator		Team 1	Modesto	Firs		Amy	Jay	U_8306_Simulator	Manchester	Team 1	Modesto	First Dire
	lan	Johnson	U_6008_Simulator	Manchester	Team 1	Modesto	Firs		Andrew	Faust	U_7004_Simulator	Manchester	Team 1	Modesto	First Dire
									Ann	Larson	U_8224_Simulator		Team 1	Modesto	First Dire
									Bandi	Neal	U_8232_Simulator		Team 1	Modesto	First Dire
									Brian	Chen	U_7002_Simulator		Team 1	Modesto	First Dire
									Candi	Stolpe	U_8329_Simulator		Team 1	Modesto	First Dire
									Dick	Clarkson	U_8353_Simulator	Manchester	Team 1	Modesto	First Dire
									Eduardo	Garcia	EGarcia	Manchester	Team 1	Modesto	First Dire
								< Add	Gurutej	Kaur	U_8322_Simulator	Manchester	Team 1	Modesto	First Dire
								Remove >	Henry	Dunn	HDunn	Manchester	Team 1	Modesto	First Dire
									Joan	Stuart	U_8330_Simulator	Manchester	Team 1	Modesto	First Dire
									Kai	Lemieux	U_8225_Simulator	Manchester	Team 1	Modesto	First Dire
									Kathy	Gurin	U_8223_Simulator	Manchester	Team 1	Modesto	First Dire
									Kim	Lewis	KLewis	Manchester	Team 1	Modesto	First Dire
									Lany	Fin	U_7005_Simulator	Manchester	Team 1	Modesto	First Dire
									Linda	Sweeney	U_8332_Simulator	Manchester	Team 1	Modesto	First Dire
									Lynne	Suzanne	U_8304_Simulator	Manchester	Team 1	Modesto	First Dire
									Mary	Gail	U_8307_Simulator	Manchester	Team 1	Modesto	First Dire
									Nicole	Stutts	U_8331_Simulator	Manchester	Team 1	Modesto	First Dire
									Pele	Lolani	U_8292_Simulator	Manchester	Team 1	Modesto	First Dire
									Shane	Carlson	U_6007_Simulator	Manchester	Team 1	Modesto	First Dire
									Stan	Goldman	U_6006_Simulator		Team 1	Modesto	First Dire
									Tianni	Ayala	U_7001_Simulator	Manchester	Team 1	Modesto	First Dire
	•						Þ	Export >	•						•

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

<ul> <li>We all Meetings and synchronization status with Workforce Management.</li> <li>Meeting Sessions Status</li> <li>Select All X Delete  Refresh Refresh Report</li> <li>Exceptions Legend OK  Stat Date [01 Sep 2011]  End Date 30 Sep 2011 </li> <li>Master Schedule (2) Scenarios (0) Master Schedule (2) Scenarios (0) Stat Date End Date Refresh Room Max. Seats Manager Employee ID # Users Created Name Name 9 Sep 2011 08:45 9 Sep 2011 09:45 (None&gt; Charlie White charlie 7 1 Sep 2011 13:01 Eduardo G 14 Sep 2011 08:45 14 Sep 2011 09:15 (None&gt; Alice Tabot alice 2 14 Sep 2011 22:33 Ben Lin, la</li></ul>	
Image: Select All X Delete	
Exceptions Legend         Image: Construct of the state of the st	
Image: Some/All Missing         Image: Start Date	
Start Date       01 Sep 2011       •       End Date       30 Sep 2011       •         Master Schedule (2)       Scenarios (0)       •       •       •       •         Start Date       End Date       •       •       •       •       •         Start Date       End Date       •       •       •       •       •       •         Start Date       End Date       •	
Master Schedule (2)     Scenarios (0)       Start Date     End Date       Start Date     End Date       Start Date     End Date       Start Date     Start Date       Start Date     End Date       Start Date     Start Date       Start Date     Start Date       End Date     Start Date       Start Date     Start Date       Start Date     Start Date       Start Date     Start Date       Start Date     Start Date	
Start Date       End Date       Max       Nom       Max. Seats       Manager       Employee ID       # Users       Created       Name         Image: Start Date       End Date       Image: Start Date       Seats       Seats       Charlie White       Charlie       T       1 Sep 2011 13:01       Eduardo G	
Start Date       End Date       Max       Name       Max. Seats       Manager       Employee ID       # Users       Created       Name         Image: Start Date       End Date       Image: Start Date       Start Date       Start Date       Image: Start Date       Star	
Image: Sep 2011 08:45         9 Sep 2011 09:45          Charlie White         charlie         7         1 Sep 2011 13:01         Eduardo G	
	me(s)
14 Cop 2011 04:15 14 Cop 2011 05:15 (Mappa) Alice Talket alice 2 14 Cop 2011 22:22 Peo Lin Ja	Garcia, Gurutej Ka
Alice Tablot alice 2 14 Sep 2011 02.15 KNohe Alice 1 alice 2 14 Sep 2011 22.25 ben Lin, la	an Johnson

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

File View Training Help										
Main Menu	Start User Sele	ction M	eeting Scheduler	Workforce Ma	nagement					
a 🦢 Training Manager	Start Gabi Solo		obiling Schoolaid	Wolkfords Hid	agomone					
Training Requests	Wiew all Meeting	is and synchr	onization status with	Workforce Manag	ement.					
Meetings										
A Resource Calendars	Meeting Session:	Status	5)							
Room Calendars		$\sim$								
Trainer Calendars	Master Sched	ule Sce	narios							
A Manager Calendars	Meeting Sessio	n Filtom								
Se Training Manager Portal Users	Meeting Jessic	AT THEOS								
⊳ 🥁 WFM	Enable Da	ite Filter								
Configuration	Start Dat	te 07 Sep	2011 🔍 - E	nd Date 21 Sep	2011	-				
A Section Grand Manager				21000						
Training Categories	Enable Sta	atus Filter								
Meeting Types				1						
Booking Categories										
Selection & Exclusion										
> 1 the Resources	Columns									
p a s Resources S Training Manager Portal	Location	🔽 Team	🗸 Site 🗸 Busin	ess Unit						
Skills Assessor										
Skills Assessor	First Name	Last Name	Employee ID	Location	📸 Team	Sta	🙈 Business Unit	Reeting	Start Date	E ^
	Amy	Jay	U 8306 Simulator		Team 1	Modesto	First Direct National Bank		Start Date	
	Andrew	Faust	U 7004 Simulator		Team 1	Modesto	First Direct National Bank			
Sub Menu	Ann	Larson	U 8224 Simulator		Team 1	Modesto	First Direct National Bank			E
⊿ 🔲 Meetings	Bandi	Neal	U_8232_Simulator		Team 1	Modesto	First Direct National Bank	New Team Meeting		
✓ Viewing by Location	🥰 Ben	Lin	U_8227_Simulator	Manchester	Team 1	Modesto	First Direct National Bank	New Team Meeting	14 Sep 2011 04:15	1
🚊 <no location=""></no>	Brian	Chen	U_7002_Simulator		Team 1	Modesto	First Direct National Bank			
⊳ 🛄 London	Candi	Stolpe	U_8329_Simulator		Team 1	Modesto	First Direct National Bank			
Manchester	Dick Big Eduardo	Clarkson	U_8353_Simulator EGarcia	Manchester Manchester	Team 1	Modesto Modesto	First Direct National Bank First Direct National Bank		0.0.0011.00.45	
Charlie White	Gurutej	Garcia Kaur	U 8322 Simulator		Team 1 Team 1	Modesto	First Direct National Bank			9
a Oliver Wilson	Henry	Dunn	HDunn	Manchester	Team 1	Modesto	First Direct National Bank		5 Sep 2011 00.45	
Ŭ,	🗳 lan	Johnson	U 6008 Simulator		Team 1	Modesto	First Direct National Bank		14 Sep 2011 04:15	1 -
	•									P
									🔒 E	coort
	25 Item(s)									· · ·
	2.5 item(s)									
🔅 Preferences 👻							< Pre	vious Next >	Apply	Close

## **Training Request Start Date Filter**

A training start date filter is available as an option underneath Training Requests.

File View Training Help	
Man Menu	
. Training Manager	
In Training Requests	
Maetings	
22 Peeriverse Calendars	
41 Room Calendare	
👗 Trainer Calendara	
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a 🐜 MEM	
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🖕 🐜 Training Manager	
Training Categories	
Thering Types	
Booking Categories	
Selection & Exclusion	
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Sub Menu	
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@ Preferences +	

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 0K.

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

File View Training Help	
Main Menu	
a 🥁 Training Manager	
Training Requests	
Meetings	
⊿ 🦉 🛱 Resource Calendars	
🚮 Room Calendars	
🚨 Trainer Calendars	
& Manager Calendars	
🥁 Training Manager Portal Users	
D 🥪 WFM	
Configuration	
🔺 🥁 Training Manager	
Training Categories	
Meeting Types	Training Window Start Date Filter
Booking Categories	
Selection & Exclusion	Set a date filter so that only Training Requests with a Training Window Start Date
⊳ ﷺ Resources	Set a date filter so that only Training Requests with a Training Window Start Date between the dates specified below will be shown.
🥪 Training Manager Portal	
Skills Assessor	Rant Date 04 Jul 2011 🕞 🖛 End Date 30 Oct 2011
Sub Menu	OK Cancel
⊿ III Training Requests	
4 Jul 2011 - 30 Oct 2011	
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# **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.

File View Training Help		
Kain Menu 🖌 🗽 Training Manager	Start User Selection Training Events Training Sessions	Completion Status Statistics
Training Requests     Mestings     Mestings     Manager Calendars     Manager Calendars     Manager Calendars     Training Manager Portal Users     WrFM     Configuration     Training Categories     Configuration     Meeting Types     Decking Categories     Selection & Exclusion     b    Training Manager Fortal     Skills Assessor	Oreade and manage Training Events to specify how you will delive this     Event T     Event T     Event T     Training Category     Delivery Method     Scheskäng Cotion     Ducation (hhmm)     Mn., Group Spe	Public Description
Sub Menu  Training Requests  4 Jul 2011 - 24 Jun 2012  9  Pensing Accroval  Customer Services Self Learning Time  Soft Sull Training  Soft Sull Training  Completed  Completed	Min. Group Size Max. Group Size Costa Event Cost	
Preferences +		<previous next=""> Acoly Oc</previous>
- Ready		Wednesday, 13 June 2012 14:58 GMT (Daylight Savings) Time Zone

This will also be visible in the Scheduling Options tab.

File View	Training Help		2
	2 Event 1 - (Schedule Event)		100
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<ul> <li>Preference</li> <li>Ready</li> </ul>			Ione I
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.

	eruptible Activities	Scheduling Options	Optimised Search	Manual	Search						
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Maste								Leste	Lym	U_8326_Simulator	Manchester	Team 2	Modest	2010
be S								Linda	Sweeney	U_8332_Simulator	Manchester	Team 1	Modest	
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a Tra								Megan	Parker	U_8351_Simulator	Manchester	Team 2	Modest	ecker
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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.

Resources Interruptible Activities	Scheduling Options Optim	ised Search Manual Search	h				
Optimised Search Algorithm Template	Waddan	Hours (Local)	Window : 25 Jun 2012 to	20 hm 2012			Build Dates
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Trainer Travel	Fri 07:00	19:00		8 Jun 2012 19:00 9 Jun 2012 19:00			
Performance Constraints	Sat 07:00 10	19:00		0 Jun 2012 19:00			
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Exceptions COK C Masing	he training essions are	Calendar Item				Retri	eve fresh dala from WFM 👿 Search 👄
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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.

Resources Interuptble Activities Schedulin	g Options Optimised Search	h Manual Sea	aron (						
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Min. Activity Gap After (mins) 0.0	Thu 07:00 10 19:00		26 Jun 2012 07:00	26 Jun 2012 190					
Trainer Travel	Fil 07:00 01 19:00		27 Jun 2012 07:00 28 Jun 2012 07:00	27 Jun 2012 190 28 Jun 2012 190					
Performance Constraints	Sat 07:00 0 19:00		29 Jun 2012 07:00	29 Jun 2012 19 0					
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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.

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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.

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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.

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## 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.

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#### **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.

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#### **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.

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#### **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.

File View Training Help												
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Reports

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

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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.

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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.

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Any training activity in the selected date range will then be displayed.

This information can also be exported by clicking the Export button.

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Sub Menu	[€] 2 Rem(s)	11						Export			

#### **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.	
🥃 Training Manager		Select the required report.	_ 7 🛛
Eile View Iraining Help			
Main Menu  Training Manager  Completion Status  Completion Status  Reports  Completion Status  Reports  Completion Status  Reports  Completion Status  Reports  Repor	Repot Training Overview Try Multiple Trainer Courses Start Date 26 Jul 2010 V End Date (09 Aug 2010	▼ <sup>®</sup> Refresh	
Sub Menu		Export if required, although the data could be immediate out-of-date.	ely
Preferences 👻			Export

# **Useful Tips**

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