Genesys

Genesys Training Manager 8.1.1

Web Portal Manager Guide

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Preface

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

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

The training roadmap for any scheduled training activity is also visible.

This document is valid only for the 8.1.1 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 e-mail from Genesys Order Management at `orderman@genesyslab.com`.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on .

About Genesys Training Manager

Genesys Training Manager enables companies to create, manage, and schedule multiple agent training activities, 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. Team meetings and one-to-ones automatically include the manager.

A browser-based Web portal is included as part of the application, allowing visibility into the scheduled training and meeting activity, together with any other available details. For example, it describes the reason for the training, the room, the identity of the

trainer, any pre-training work of the manager, and who attended. This portal automatically updates Training Manager, and if there were any non-attendees these 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 e-mail your comments to `Techpubs.webadmin@genesyslab.com`.

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

When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

Contacting Genesys Technical Support

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

Related Documentation Resources

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

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

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Consult these additional resources as necessary:

• The *Genesys Technical Publications Glossary,* which ships on the Genesys Documentation Library CD and which provides a comprehensive list of the Genesys and CTI terminology and acronyms used in this document.

• The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at `http://genesyslab.com/support`.

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

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

Genesys product documentation is available on the:

- Genesys Technical Support website at `http://genesyslab.com/support`.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at `orderman@genesyslab.com`.

Document Conventions

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

Document Version Number

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

> 42gp_icg_aspect-wfm_08-2010_v4.2.001.01

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

Screen Captures Used in This Document

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

Type Styles

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

Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis	Please consult the *Genesys Migration Guide* for more

	• Definitions of (or first references to) unfamiliar terms • Mathematical variables	information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession.
Monospace font (Looks like `teletype` or `typewriter text`)	All programming identifiers and GUI elements. This convention includes: • The *names* of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.	Select the `Show variables on screen` check box. In the `Operand` text box, enter your formula. Click `OK` to exit the `Properties` dialog box. T-Server distributes the error messages in `EventError` events. If you select `true` for the `inbound-bsns-calls` option, all established inbound calls on a local agent are considered business calls. Enter `exit` on the command line.
Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise.	`smcp_server –host <confighost>`

Web Portal Manager

The Manager

When the manager logs on to the system, he or she is presented with a home page view similar to the following example.

The manager has access to:
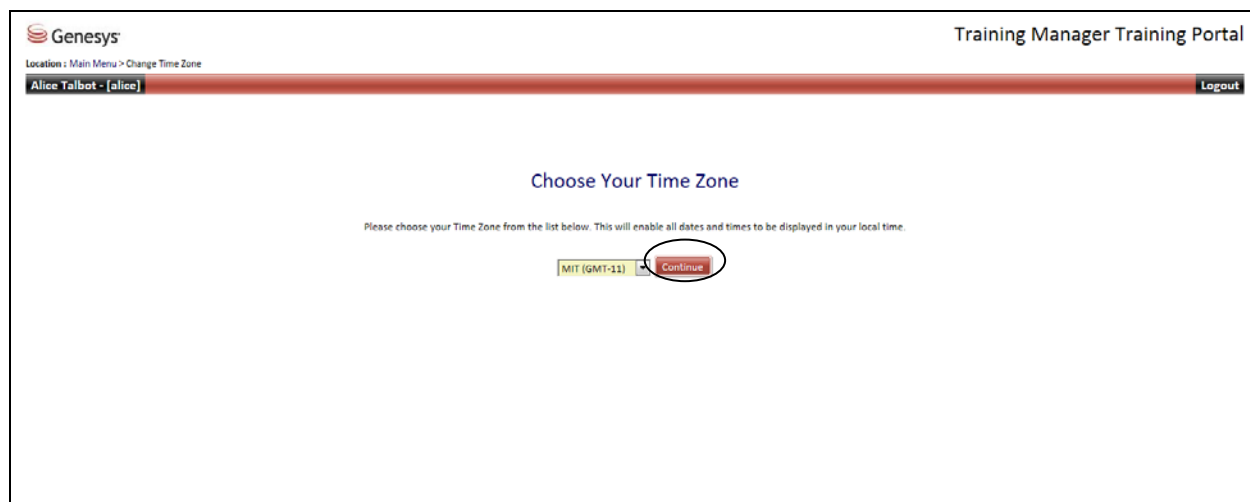
- `manager calendar`

- `agent calendar`

- `room calendar`

- `set your regular working hours`

- `set exceptions to your regular hours`

- `change your time zone`

- `training roadmap`

The home page is separated into two sections, `my options` in the left pane and `training roadmap` in the right pane.

The option to log out is available in the top-right corner of each screen.

Training details will only be visible in the portal if training sessions have already been created in Training Manager.

When the manager logs in initially, a time zone must be selected from the drop down box. Click on Continue to access the home page.

Home page.

My Options

Manager Calendar

Clicking `manager calendar` on the home page will present a standard view of any scheduled activity. This will include any team meetings, one-to-ones, or other activity that has been entered on the `Planner View` tab.

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

Clicking one of the schedule bars will reveal any details associated with that scheduled item.

In the following example, the scheduled one-to-one is with agent Linda Sweeney.

Clicking the Planner View tab will present a calendar view of any scheduled activity, as shown in the following example. The planner view can be displayed by day, week, or month, as required.

Each event is color-coded, as explained in the legend on the left side of the screen.

Training Manager will schedule team meetings and one-to-ones based on the agents' scheduled activity in WFM and their manager's availability. The manager therefore has to keep his or her availability in Training Manager up to date.

On the Planner View tab, the manager can enter any non-availability time directly into Training Manager through his or her Web portal.

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

- New
- Go to Today – Selecting this will take the planner view to the current date.
- Toggle 24 Hours/Business Day – Selecting this will present the planner view in a 24-hour view.

For example, to enter a holiday, select New.
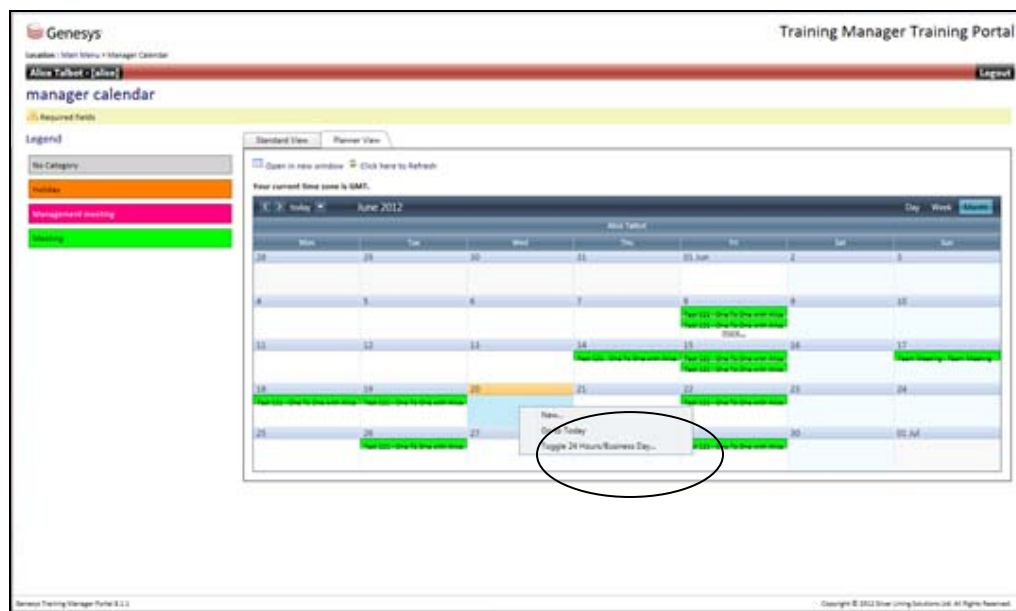
The `New Manager Calendar Entry` dialog box is then displayed.

Enter details in the `Subject` box, and complete the `Start time` and `End time` boxes if the entry is for a single day.

Select a category in the drop-down list. (Categories are color-coded, as explained in the key on the left side of the screen.)

To create an entry for multiple days, select the `Recurrence` check box.
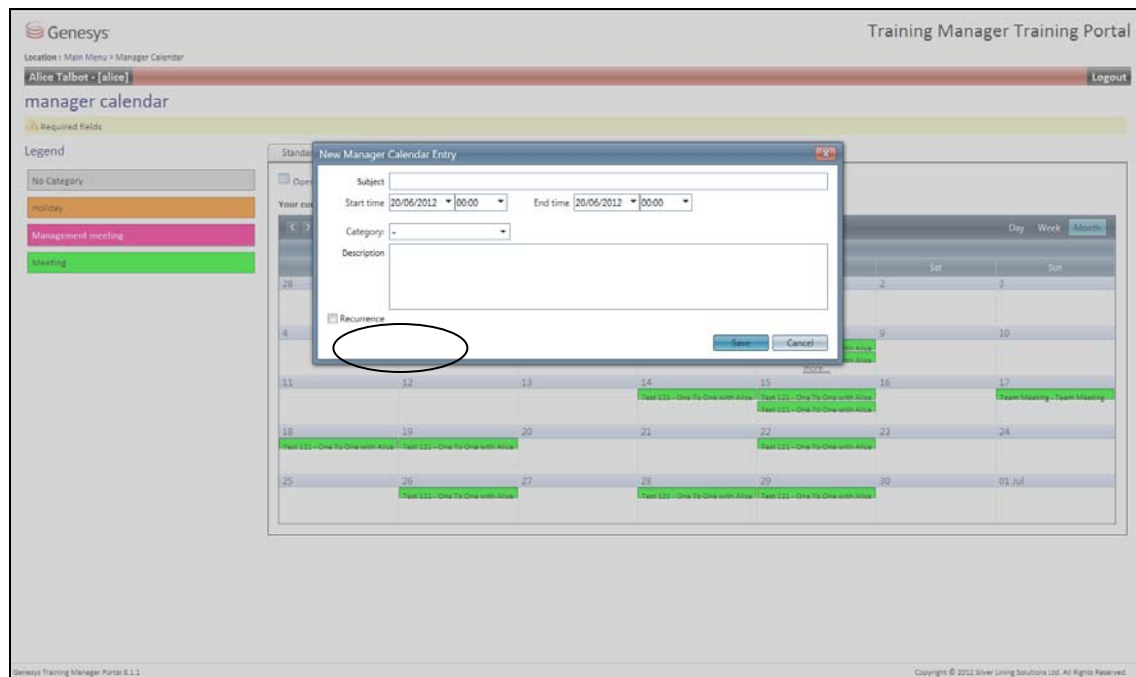
For multiple-day entries, use the `Recurrence` option to create individual events on the `Standard View` tab.

In the following example, a two-day holiday is being entered into the manager's calendar. The start time is 20/06/2012 at 08:00, and the end time is 21/06/2012 at 17:30. This will then create two separate holiday entries on the standard view.
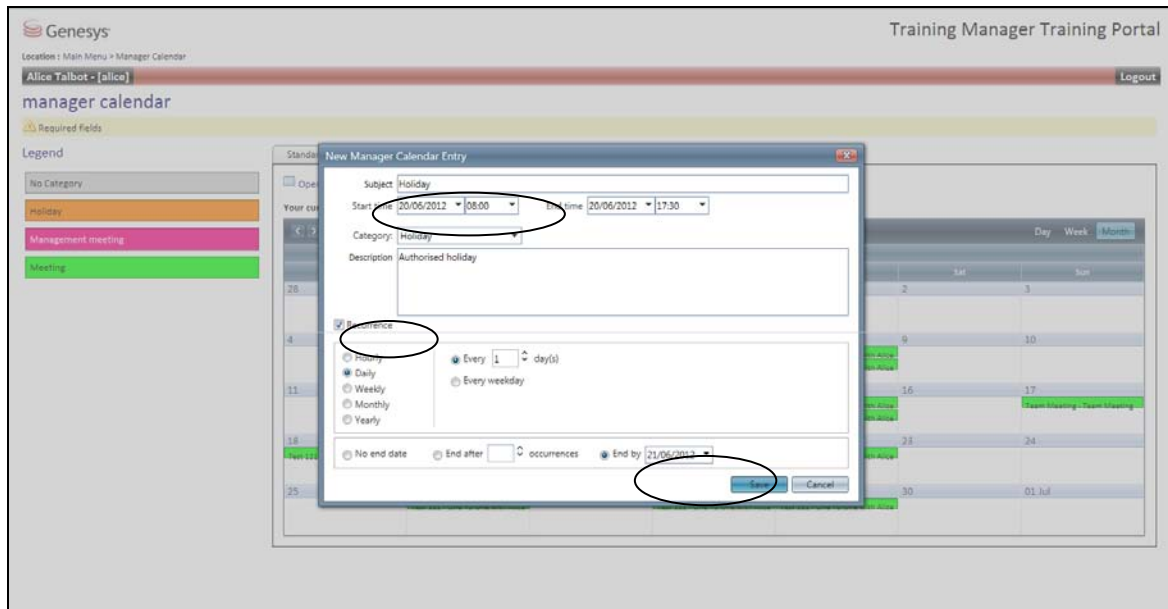
Select the relevant category in the drop-down list. This will display the entry with the associated name and color-coding for easy visibility. (The categories are created in Training Manager.)
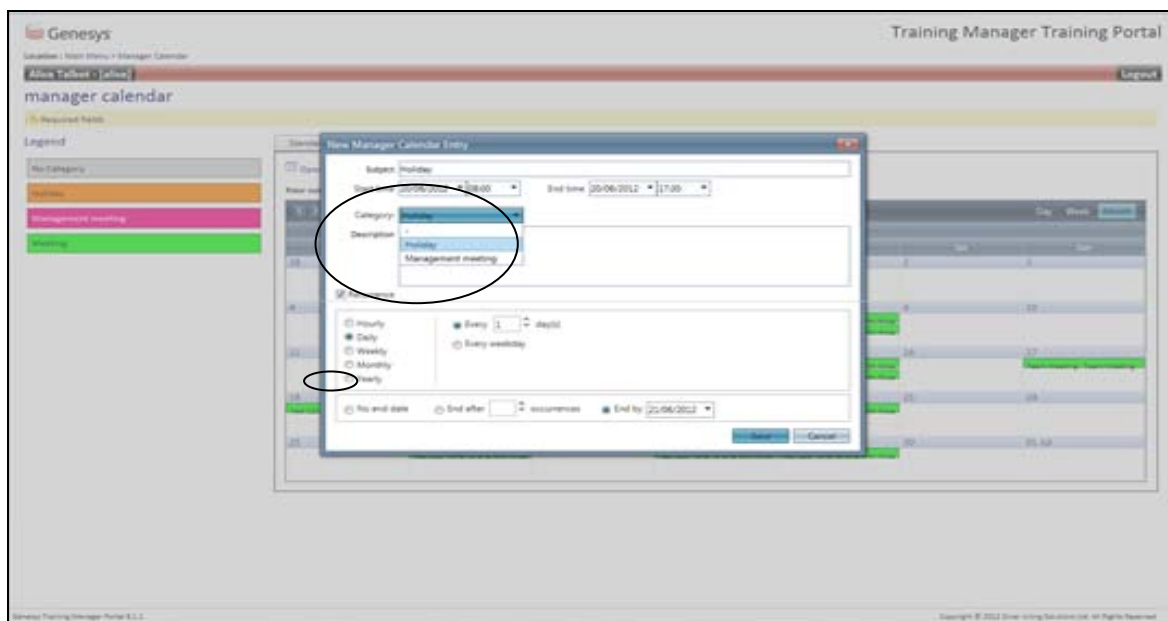
After you select the `Recurrence` check box, the recurrence options become available. In this example, because the entry is for two days, `Daily` has been selected, together with `Every weekday` to exclude weekends, and an end date has been selected.
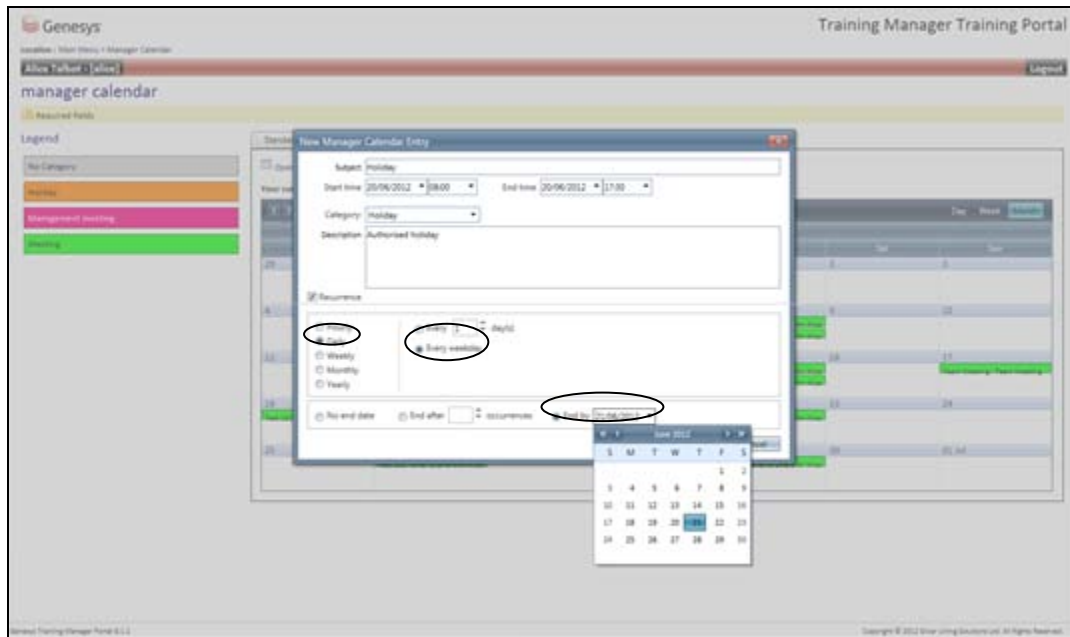
Click `Save` when all of the details have been completed, and the event will then appear in the manager calendar.
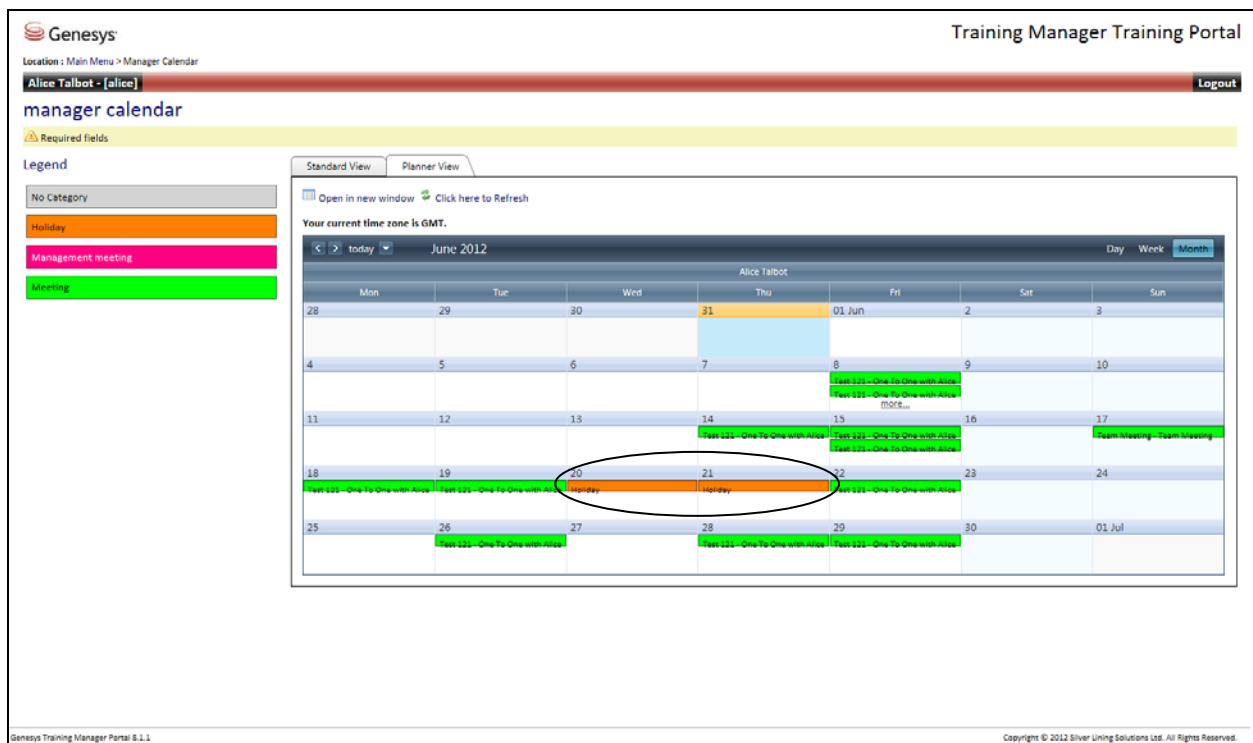
The event will also appear on the `Standard View` tab as an entry for each date.

To edit an existing entry—and only events created on the `Planner View` tab can be changed—right-click the entry, and this will present three options:

- `Edit` – Change the original entry either by individual date or by the complete set of multiple dates.
- `Delete` – Delete the individual date.
- `Delete Future Occurrences` – Delete the multiple dates associated with the entry.

Select the appropriate option.

In this example, `Edit` has been selected, which presents two further options:

▪ `Edit only this occurrence` – Edit the individual date.

▪ `Edit the series` – Edit the complete set of multiple dates.
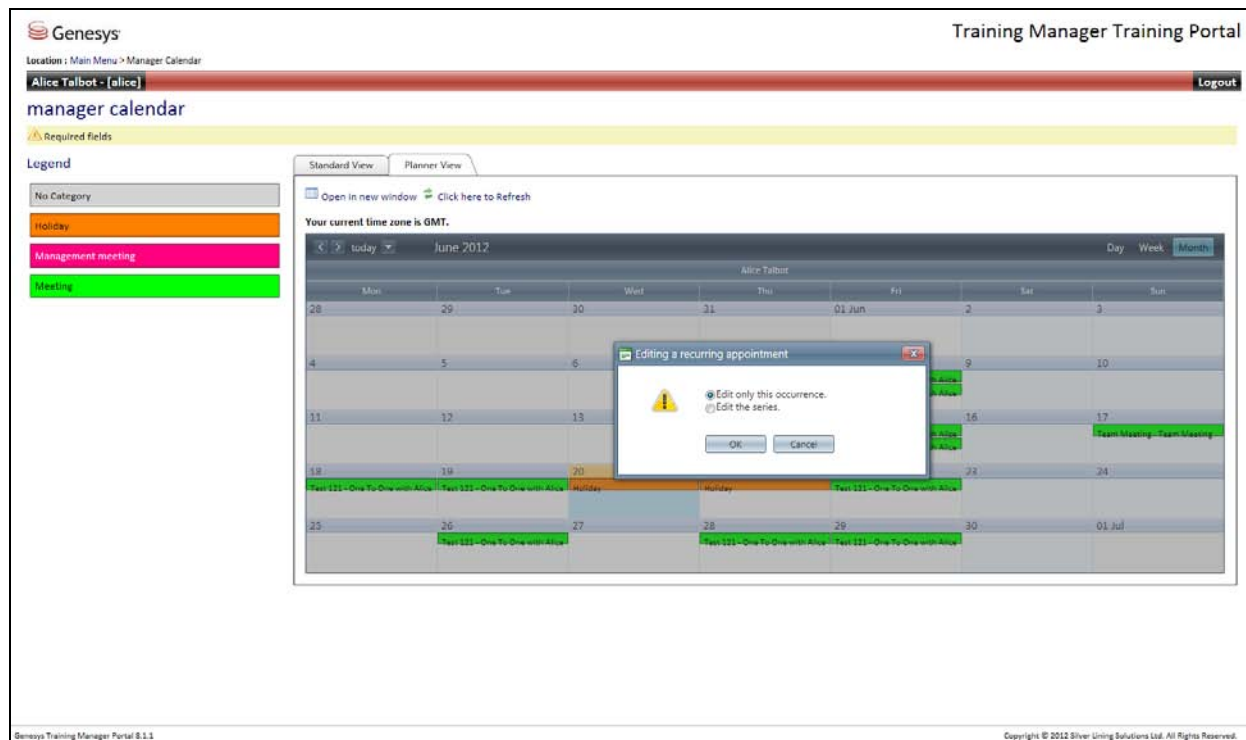
Agent Calendar

Clicking `agent calendar` on the home page will display a list of agents that the manager has access to.
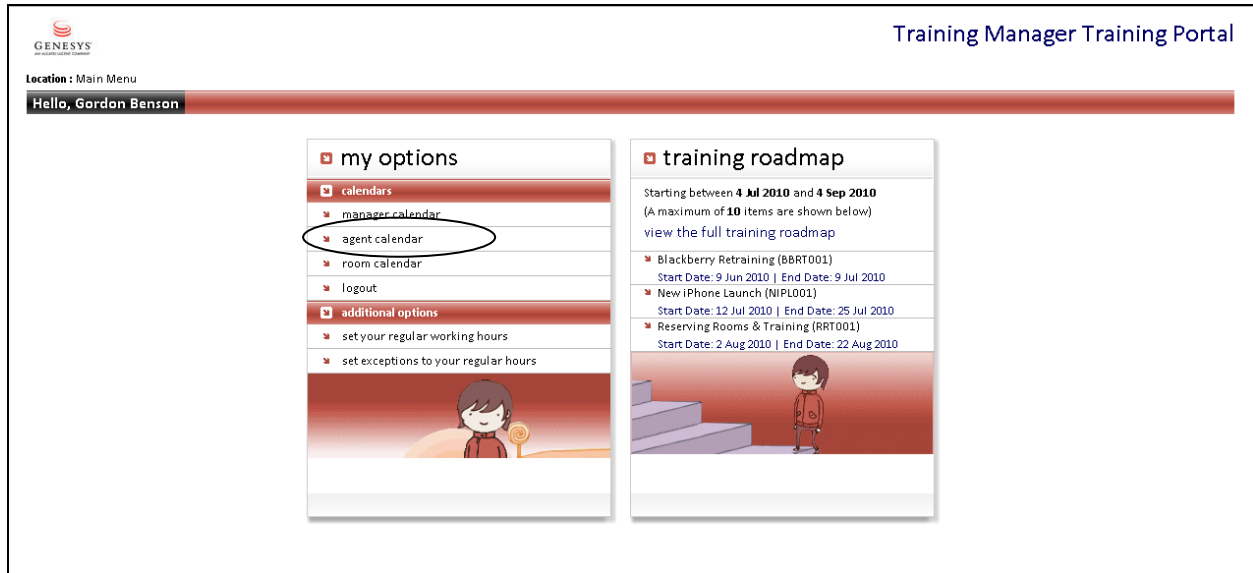
The list of agent names is presented in the bottom-left corner of the screen. (The list of agents will be managed automatically if Genesys Training Manager Portal has been integrated with an internal company data source, or this will be manually managed by the Genesys Training Manager Portal Administrator).
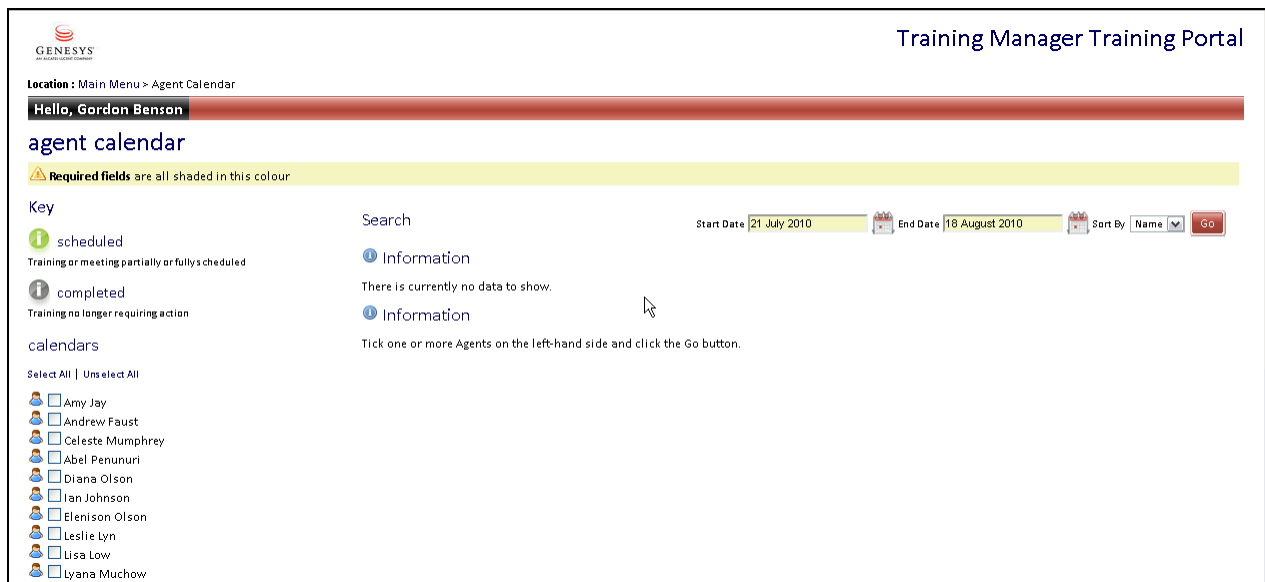
Selecting agents and then clicking Go will automatically list the agents' training activity within the specified date range.

Clicking one of the training session bars will expand the bar to reveal the trainer, the room, and any session details. The training status is color-coded, as explained in the legend on the left side of the screen.

The option to view scheduled activity for all of the agents is available by clicking Select All.

This option allows the manager to view all of the team's scheduled activity. The information is presented in a view similar to the preceding example, with all of the scheduled training activity listed down the right side of the screen.

Room Calendar

The manager also has the option to view the training activity by individual room, by clicking `room calendar` on the home page.
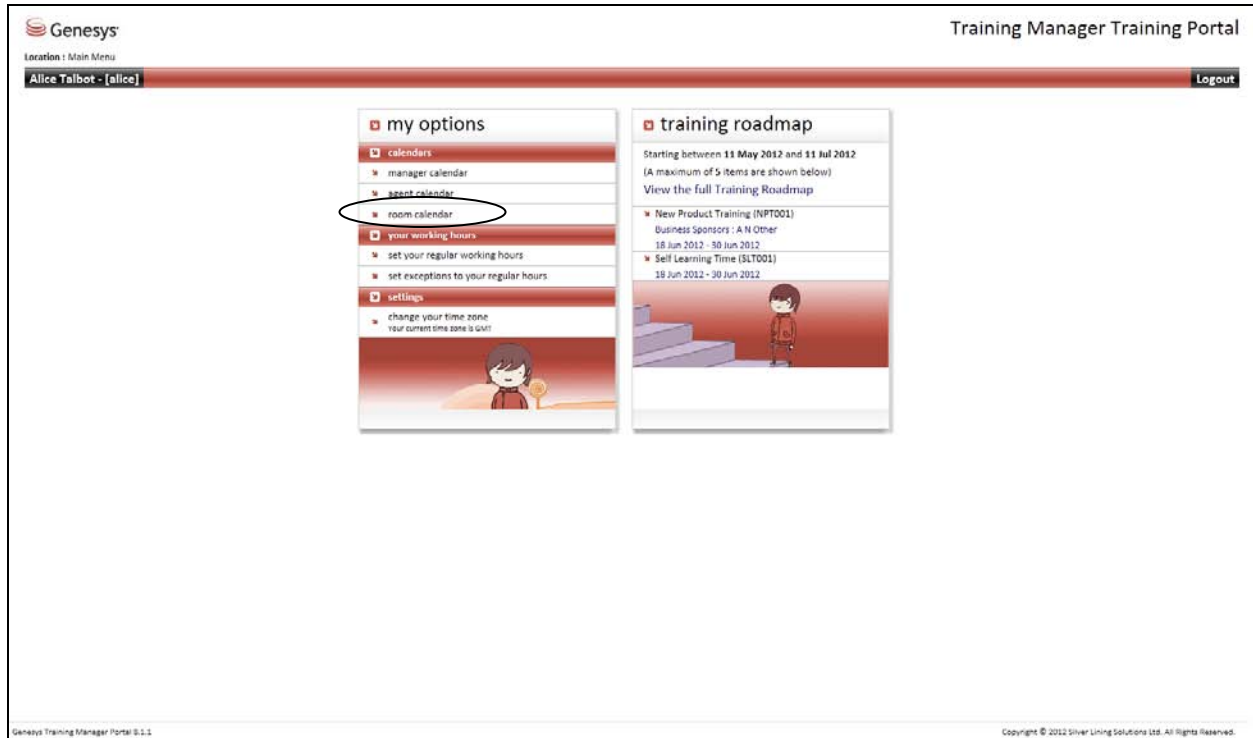
A list of all of the locations is displayed in the bottom-left corner of the screen.
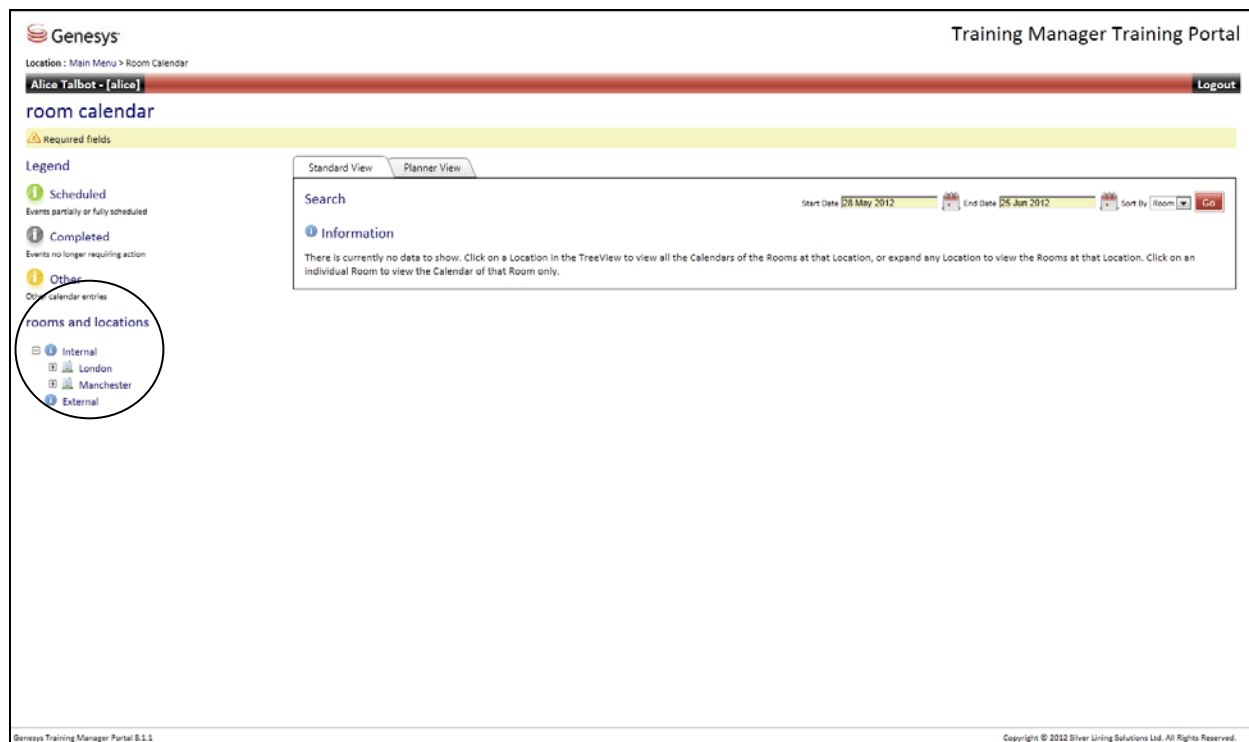
Expand a location to reveal the individual rooms.
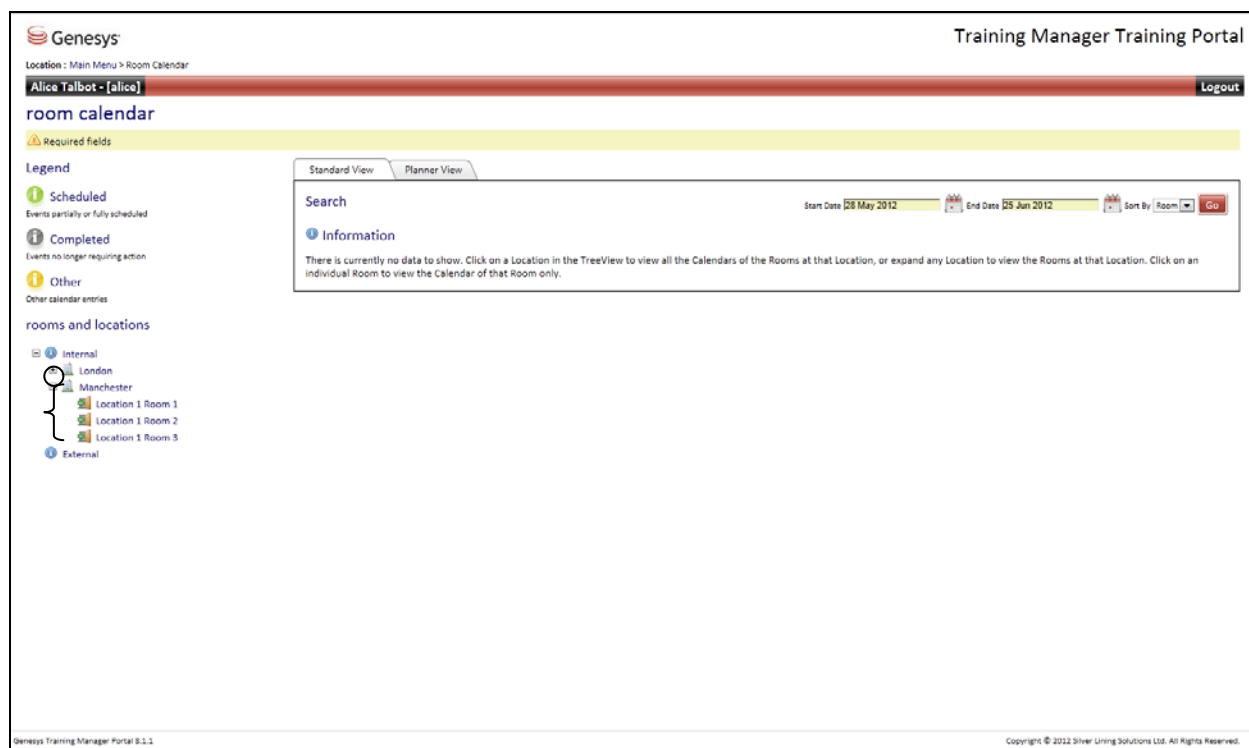
Select either the location or an individual room, adjust the date range if required, and then click Go to view the details.

Click one of the training session bars to display the training activity, as shown in the following example.

Training Roadmap

The latest scheduled training activity will be displayed in the training roadmap in the right pane of the home page, as shown in the following example.

Click `view the full training roadmap` to view all of the training sessions currently scheduled in Training Manager.
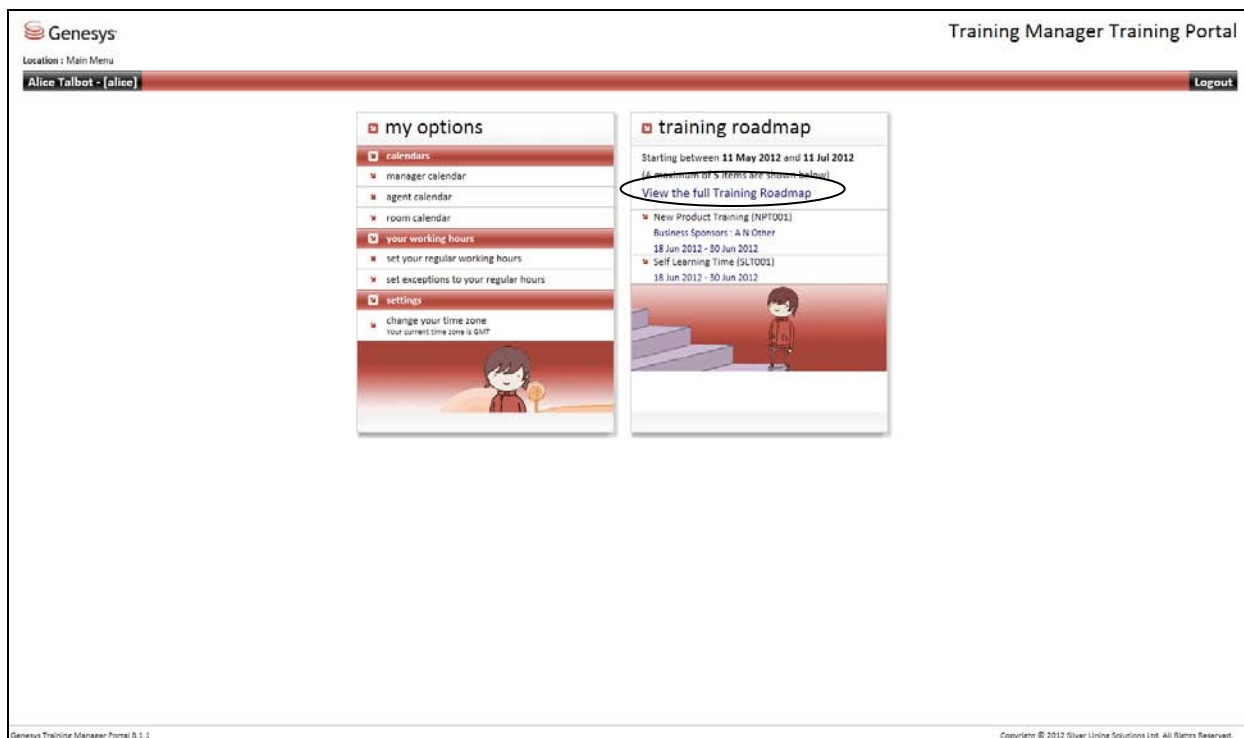
Any scheduled training activity for the specified date range will be presented on the right side of the screen, and clicking one of the training session bars will reveal any additional details.

The training status is color-coded, as explained in the key on the left side of the screen.

There is an option to filter the sessions by using the `Sort By` drop-down list.
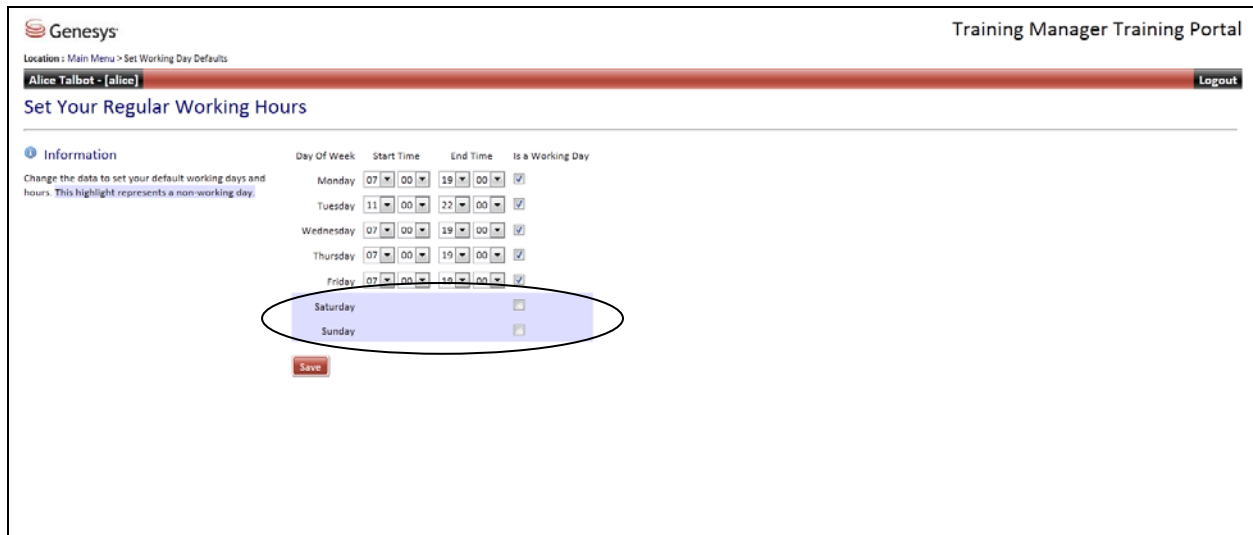
Click one of the training session bars to reveal any additional details, such as objectives or additional notes. The training sessions can also be filtered by using the `Sort By` drop-down list.

Set Your Regular Working Hours

To be able to schedule team meetings and one-to-ones, Training Manager needs to have information about the manager's availability and working hours. (The scheduled hours of agents who report to the manager are taken directly from Genesys WFM.)

Click set your regular working hours on the home page to view the manager's current default working hours.

This will present the default hours, as shown in the following example. In this example, the manager does not work Saturday or Sunday, and therefore these days are not selected and are highlighted.

To change the default hours, use the drop-down list to select the required time. To change the working days, either select or clear the days by using the check box on the right side, under Is a working day.

These default working hours are used on the Set Working Days screen in the next section.

Set Exceptions to Your Regular Hours

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

Any changes to the manager's regular hours can be made by clicking `set exceptions to your regular hours` on the home page.
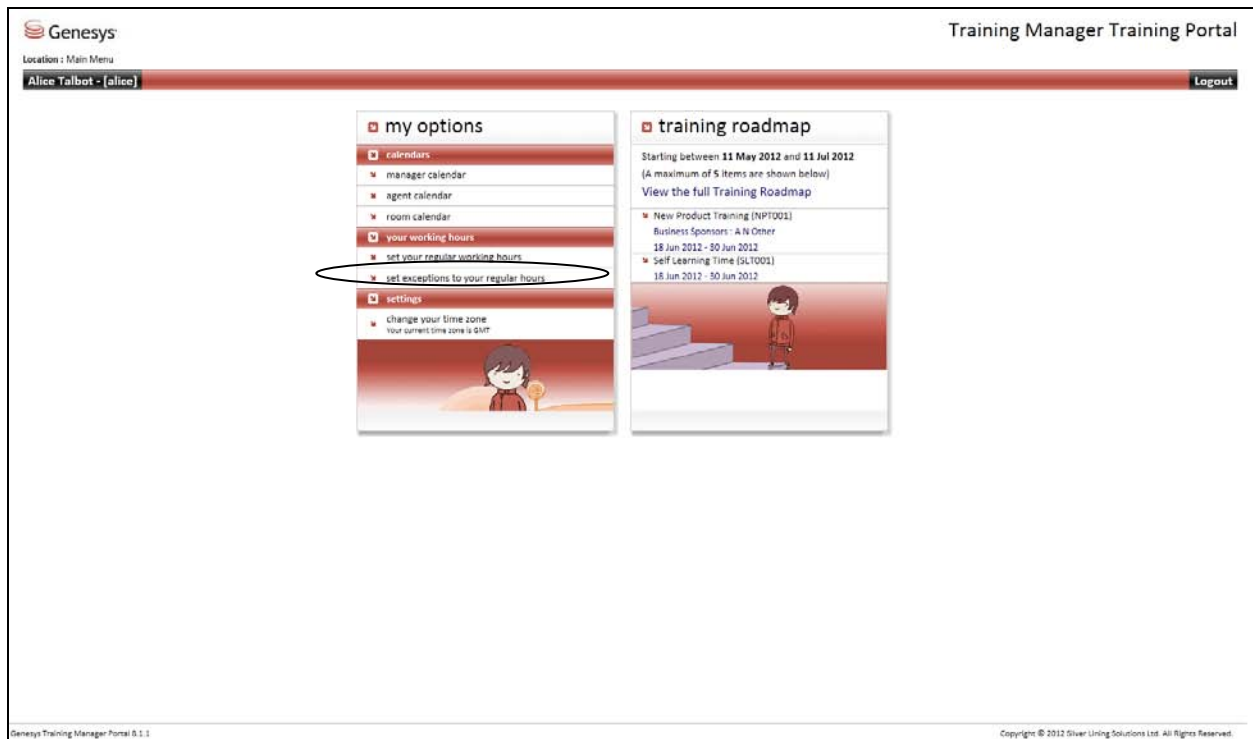
In the following example, weekends are identified as non-working days for the manager by default, as specified on the `Set Working Day Defaults` screen in the last section.

Note: No changes can be made in the 14-day period that immediately precedes the affected date.

To make any changes, clear the `Use default hours` check box for the required date to indicate that the hours are not the default working hours.

Change the hours by using the drop-down list to select the required hours.

Leave the `Is a working day` check box selected, and Training Manager will use these changed hours when scheduling any activity on that date.

This procedure should not be used to change hours because of holidays. It is only used when the manager is working hours that differ from his or her normal working hours.