

Genesys Training Manager 8.1.1

Web Portal Manager Guide

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Genesys is the world's leading provider of customer service and contact center software - with more than 4,000 customers in 80 countries. Drawing on its more than 20 years of customer service innovation and experience, Genesys is uniquely positioned to help companies bring their people, insights and customer channels together to effectively drive today's customer conversation. Genesys software directs more than 100 million interactions every day, maximizing the value of customer engagement and differentiating the experience by driving personalization and multi-channel customer service - and extending customer service across the enterprise to optimize processes and the performance of customer-facing employees. Go to www.genesyslab.com for more information.

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

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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 <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 8</u>.

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 oneto-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 <u>Techpubs.webadmin@genesyslab.com</u>.

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

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

Contacting Genesys Technical Support

If you have purchased support directly from Genesys, ,see the <u>Contact Information</u> on the Tech Support website. Before contacting technical support, refer to the <u>Genesys</u> <u>Technical 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 http://genesyslab.com/support.

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

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

Genesys product documentation is available on the:

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

Document Conventions

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

Document Version Number

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

42gp_icg_aspect-wfm_08-2010_v4.2.001.01

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

Screen Captures Used in This Document

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

Type Styles

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

Type Styles

Type Style	Used For	Examples
Italic	Document titles	Please consult the <i>Genesys</i> Migration Guide for more
	Emphasis	migration outle for more

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



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.

Senesys:	Training Manager Training Portal
Location : Main Menu > Change Time Zone	
Alice Talbot - [alice]	Logout
Choose Your Time Zone	
Please choose your Time Zone from the list below. This will enable all dates and times to be displayed in your local time.	
MIT (GMT-11) Continue	

Home page.

my options	training roadmap	
Calendars	Starting between 10 May 2012 and 10 Jul 2012	
manager calendar	(A maximum of 5 items are shown below)	
 agent calendar 	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 	Self Learning Time (SLT001)	
set exceptions to your regular hours	18 Jun 2012 - 50 Jun 2012	
settings		
change your time zone your current time zone is GMT		

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.

Genesys Location Manager Calendar			Training Ma	nager Training Porta
Alice Talbot - [alice]				Logou
manager calendar				
🔨 Required fields	\frown			
egend	Standard View Planner View			
Scheduled vents partially or fully scheduled	Search	Start Date 27 May 2012	End Date 24 Jun 2012	Sort By Manager • GO
Completed	Alice talbot			
Events no longer requiring action	Friday, 8 June 2012			
Uther Other calendar entries	08:00 - 08:30 GMT (Daylight Savings) Test 123 Manager - Alice Tallot / Attendees: 1			
	08:30 - 09:00 GMT (Daylight Savings) Test 133 Manager Alce Tatloct / Attandeer: 1			
	13:30 - 14:00 GMT (Daylight Savings) Team Meeting Manager: Alice Talbot / Attendees: 8			
	Thursday, 14 June 2012			
	08:00 - 08:30 GMT (Daylight Savings) Ten 121 Manager: Alice Tablot / Attendeer, 1			
	Friday, 15 June 2012			
	15:00 - 15:30 GMT (Daylight Savings) Test 221 Mineser: Alice Terbot / Attendeer: 1			
	16:30 - 17:00 GMT (Daylight Savings) Text 1/3 Manager: Alice Tablet / Attendees: 1			
	Sunday, 17 June 2012			
	09:00 - 09:30 GMT (Daylight Savings) Team Meeting Menager, Alice Tallos / Attendees, 8			
	Monday, 18 June 2012			
	08:00 - 08:30 GMT (Daylight Sawings) Text 131 Manager, Alon Talbot / Attendeer, 1			
	Tuesday, 19 June 2012			
	16:30 - 17:00 GMT (Daylight Savings) Test 121 Manager: Arce Tablot / Attendent: 1			

Web Portal Manager

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.

Senesys			Training Ma	nager Training Porta
ocation : Main Menu > Manager Calendar				Logou
Alice Talbot - [alice]				Logou
manager calendar				
🖄 Required fields				
egend	Standard View Planner View			
Scheduled vents partially of fully scheduled	Search	Start Date 27 May 2012	End Date 24 Jun 2012	Sort By Manager 💌 🕝
Completed vents na langer requiring action	Friday, 8 Jose 2012			
Other Other calendar entries	08:00 - 08:30 GMT (Daylight Savings) Text 121 Manager: Also Tablot / Atlandee:: 1			
	Amanager: Alice Talbot 🍕 Room: «None» Employee ID First Name Last Name U_8329_Simulator Candi Stolpe			
	08:30 - 09:00 GMT (Daylight Savings) Tere 131 Manager Also Talloc / Attenden: 1			
	Them Meeting 13:30 - 14:00 GMT (Daylight Savings) Manager Alice Tables / Amendeer 8 Thursday, 14 June 2012			
	101/1024, 14 June 2012 76/1223 76/1223 Manager: Align Tailots / Amendeen: 1			
	Friday, 15 June 2012			
	15:00 - 15:30 GMT (Daylight Savings) Teet 123 Manager: Alice Tailor / Attendees: 1			
	16:30 - 17:00 GMT (Daylight Savings) Test 121 Manager Alce Tathor / Attendent 1			
	Sunday, 17 June 2012			
	09:00 - 09:30 GMT (Daylight Savings) Manager Alce Tathor / Attendeet: 8			
	Monday, 18 June 2012			

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.

ice Talbot - [alice]							
anager calendar							
Required fields	(
end	Standard View PI	anner View					
Category		W 🛱 Click here to Refresh					
	Your current time zone						
iday	today =	June 2012					Day Week Month
sagement meeting	today -	June 2012		Alice Talbot			Cay Week Mone
eting	Man	Tue	Wed	Thu	Fri	Sat	Sun
	28	29	30	31	01 Jun	2	3
	4	5	6	7	8	9	10
					Test 121 - One To One will Test 121 - One To One will more	th Allow	
	11	12	13	14	15	16	17
				Test 131 - One To One will	In Alice Test 121 - One To One w	th Alice	Team Meeting - Team Meeting
	18	19	20	21	22	23	24
	Test 121 - One To One with	Alce Lett LUS - One To One wit	n allos	**	Tett 121 - One To One wo	th Alice	*7
	25	26 Text 122 - One Te One with	27 h Alice	28 Test 131 - One To One with	29 In Alice Test 121 - One To One wi	30	01 Jul
	23			Provide the second s			01 Jul

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.

Nue Talbet ((alue)								Line of the second s
nanager calendar								
hepared fields								
igend	Standard Ven 2	Service View						
No Category	Caret in new article	· · Cut have to heteror						
Saliday.	Tour current line come							
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	ALC: NO. OF THE OWNER.			-	-	10000	1000	-
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	*	3		1		Part of the lot of	-	10
	1.1					Barriel Contractor	- 100 C	
	13		14	14	and is the owned	15 Charlies the home way	24	17 The local day lines of the lines of the
						101010-0010-000	-	
	18 No. 10 No. 10 No. 10	19	20	21		22	23	24
	-5000 Seconds			New.				
	25	28	23	Copyre 24 March	Second Sec.		30	M.P
				- all a second)		

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.

Senesys						Training N	Aanager Training Port
Location : Main Menu > Manager Calendar							10 10 10 10 10 10 10 10 10 10 10 10 10 1
Alice Talbot - [alice]							Logo
nanager calendar							
A Required fields							
egend	Standa New	Manager Calendar Entry				3	
No Category	Oper	Subject					
noticity	Your cut	Start time 20/06/2012 • 00:	00 • End time 20	06/2012 • 00:00 •			
Management meeting	(S.)	Category: -	+				Day Week Months
Meeting		Description					
	28					2	Sun 3
	4	ecurrence				9	10
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	10	19	20	21	22	23	24
	Test 122-One Te-	Die with Alice Tell 222-Die 75-0	She with Alice		Ten 122-Die 700	New WILL ADOR	
	25	26	27	28	29	30	NUC 10
		Test 121 - One To O			na with Alize Test 121-00% To 1		
ys Training Managar Portai 8.1.1							t © 2012 Silver Lining Solutions Ltd. All Rights Rese

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.

Genesys		Training N	lanager Training Port
ocation : Main Menu > Manager Calendar			
Alice Talbot - (alice)			Logo
manager calendar			
Acquired fields			
egend	Standa New Manager Calendar Entry	- EE	
No Category	Oper Subject Holiday		
foliday	Your cur Start me 20/06/2012 * 08:00 * En time 20/06/2012 * 17:30 *		
Management meeting	Category: Holiday		Day Week Month
Meeting.	Description Authorised holiday		
	28	2	1
	4 Venterce		10
	Daily Daily	an Arrest an Arrest	
	11 O Weekly	16	17
	Monthly Vesrly	an and	Tase Maxing Tase Maxing
	15 O No end date O End after O occurrences @ End by 21/05/2012 -	28	24
	25	ancel 30	01.)ul
		many research in Alice	

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.)

Genesys		Training Manager Training Porta
Location I from Harry + Manager Committee		
Alon Taller Calan)		Legent
manager calendar		
To Despired NAME		
agend	Times Manager Calendar Listly	
No Tangely	They been bolder	
the state of the s	Tax or Dear 1000 200 4 (2000 * Dations (2000-2012 * (2000-2012)* (2000-2012 * (2000-2012)* (2000-2012)* (2000-2012)* (2000-2012 * (2000-2012)* (2000-2012)* (2000-2012 * (2000-2012)* (2000-2012)* (2000-2002)* (2000-2012)* (2000-200-2012)* (2000-2000-2000-2000-2000-2000-2000-200	
Deragement beering.	Company Junior of	Die Wert Annue
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	Use agreement meeting	1
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	\bigcirc	the second s
	Same of the end date of the answerrors a find by (2:06/20:2 *	
	at all and a second sec	General II. II
		and the second se
a Terring Develope Server \$1.1		Lawryn E 2011 Diwe of reg below on with Same

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.

Genesys		Training Manager Training Portal
Enclose - Marc Street, - Manager Caretter		Land Land
manager calendar		Line
Legend	Territe Terre Manager Calendar Entry	
Initial Company		
need franks therapy first \$1.1		Samps # 201 for any instrument in Ages have at

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.

Senesys		Training Manager Training Portal		
Location : Main Menu > Manager Calendar Alice Talbot - [alice]		Logout		
manager calendar		togout		
A Required fields				
Legend	Standard View Planner View			
Scheduled Events partially or fully scheduled	Search	Start Dete 17 Jun 2012 End Date 24 Jun 2012 Sort By Manager 💌 Go		
Completed	Alice Talbot			
Events no longer requiring action	Sunday, 17 June 2012			
Other Other calendar entries	Team Meeting Menager: Acce Tatloct / Attendent: 8			
	Monday, 18 June 2012			
	08:00 - 08:30 GMT (Daylight Savings) Text 221 Manager Ace Tablet / Attendeet: 1			
	Tuesday, 19 June 2012			
	16:30 - 17:00 GMT (Daylight Savings) Test 121 Manager: Alice Tatloor / Amendeer: 1			
	Wednesday, 20 June 2012			
	08:00 - 17:30 GMT (Daylight Savings) Holiday			
	Thursday, 21 June 2012			
	08:00 - 17:30 GMT (Daylight Savings) Holiday			
	Friday, 22 June 2012			
	08:00 - 08:30 GMT (Daylight Savings) Ten 121 Manager: Alice Talbot / Attendees: 1			

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.

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Talbets (also)								
hager calendar								
unet helds								
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	13	<u>11</u>	11		14	15	34	17
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	18	10	28		n	11	20	34
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	H)	28	17	A Deine.		1	30	TE M
		Name and Address of	the second second	X Debte Tutu	Constants.		10	
						/		

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.

Genesys'							Training Ma	nager Training Porta
Alice Talbot - (alice)								Logou
manager calendar								Book_Adv
A Required fields								
Legend	Standard View PI	anner View						
No Category	Open in new window	Click here to Refresh						
Holiday	Your current time zone							
Management meeting	C 5 today 🔻	June 2012						Day Week Month
					Alice Talbut			
Meeting	Mon	29	20	West	21	Ft) 01 Jun	141	1un
	20	49.	10		-	144 Mar.	-	
	4		6	Editing a re	curring appointment		9	10
		T.		1.00	Edit only this occurrent			
	21	12	13	4	Edit the series.	ice.	16	17
					OK Cance			Team Meaning Team Meaning
	18	19	20			_	28	24
	Test 121 - One To One with	Afos	Alex Holiday		Il Holday	Test 121 - One To One with a	A21	
	25	26	2.7		28	29	30	01. Jul
		7+11121-01+To 01++4111	Alua		Tein 321 - One To One with A	lice Test 121 - One To One with a		
								-
Remosys Training Manager Portal 8.1.1							Copyright © 20	12 Silver Lining Solutions Ltd. All Rights Reserve

Agent Calendar

Clicking agent calendar on the home page will display a list of agents that the manager has access to.

GENESYS		Train	ing Manager Training Portal
Location : Main Menu Hello, Gordon Benson			
	my options	training roadmap	
	 calendars manager calendar agent calendar room calendar logout additional options set your regular working hours set exceptions to your regular hours 	Starting between 4 Jil 2010 and 4 Sep 2010 (A maximum of 10 items are shown below) view the full training roadmap Blackberry Retraining (8BRT001) Start Date: Jun 2010 J. End Date: 9 Jul 2010 New iPhone Launch (NIPL001) Start Date: 22 Jul 2010 J. End Date: 25 Jul 2010 Reserving Rooms & Training (RRT001) Start Date: 2 Aug 2010 J. End Date: 22 Aug 2010	

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).

GENESYS'			Training Manager Training Portal
Location : Main Menu ≻ Agent Calendar			
Hello, Gordon Benson			
agent calendar			
A Required fields are all shaded in this colour			
Кеу	Search	Start Date 21 July 2010	👫 End Date 18 August 2010 🎢 Sort By Name 💓 🔽
scheduled Training or meeting partially or fully scheduled	Information		
Completed	There is currently no data to show.		
Training no longer requiring action	Information	<i>⊊</i>	
calendars	Tick one or more Agents on the left-hand side	e and click the Go button.	
Select All Unselect All			
🚨 🗔 Amy Jay			
🐣 🔲 Andrew Faust			
and Celeste Mumphrey			
🚨 🗔 Abel Penunuri 🚨 🗔 Diana Olson			
an Johnson			
a Elenison Olson			
🚨 🔲 Leslie Lyn			
🐣 🔲 Lisa Low			
🐣 🔲 Lyana Muchow			

Selecting agents and then clicking 60 will automatically list the agents' training activity within the specified date range.

Genesys'	Training Manager Training Portal
Alice Talbot - [alice]	Logout
agent calendar	
A Required fields	
Legend	\bigcirc
Scheduled Events persently of fully poteduled	Search Start Date (20 Jun 2012) 🛗 End Date (25 Jun 2012) 🛗 End Date (25 Jun 2012) 🛗 Sort By Terre and Color By Terre
Completed	Friday, Sjune 2012
my calendar	13:30 - 14:00 GMT (Daylight Savings) Taim Meeting.
🚨 Alice Talbot	
managed calendars	Sunday, 17 June 2012 Taxin Meeting OB:00 - 09:30 GMT (Daylight Savings) Unproger airs Tomot
Amy Jay	Saturday, 23 June 2012
Bandi Neal Bandi Neal Bran Lin Crand Stolee Condi Stolee Dock Clarkson Eduardo García Gurutej Kaur Menoy Dunn Isan Johnson Skathy Curin Kathy Curin Skathy Curin Skathy Curin Stan Goldman Stan Goldman	00:15-09:45 GMT (Daylight Savings) forflamming Time (417001)
Generys Training Manager Portal & 1.1	Copyright & 2012 Silver Lining Solutions (tal. All Rights Reserved.

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.

Senesys [.]	Training Manager Trainin				
ocation : Main Menu > Agent Calendar Alice Talbot - (alice)				Logo	
agent calendar				City An	
Acquired fields					
egend	Search	Start Date 28 May 2012	Ind Date 30 Jun 2012	Sort By Name 💌 Go	
Scheduled	Anny lay				
Completed	Friday, 8 June 2012				
ents no longer requiring acion	Team Meeting				
ny calendar	13:30 - 14:00 GMT (Daylight Savings) Manager Alice Tabot				
Alice Talbot	Sunday, 17 June 2012				
nanaged calendars	09:00 - 09:30 GMT (Daylight Savings) Team Meeting Manager: Alice Tailoot				
legt AU Unselect All	Saturday, 23 June 2012				
Amy Is	09:15 - 09:45 GMT (Daylight Savings) Set Learning Time (SLT001)				
Andrew Faust	A succession (calibration and s)				
Bandi Neal	Friday, 29 June 2012				
Brian Chen	14:30 - 15:00 GMT (Daylight Savings) New Product Training (#PT001) - Day 1 of 2 Trainer: Lucy McDonald / Room 1 Coatton 1 Room 1				
Candi Stolpe					
Eduardo Garcia	Training Request : New Product Training (NPT001) Strainer : Lucy McDonald				
Gurutej Keur	Training Event : Event 1 Event 1 Event 1 Event 1				
Ian Johnson	Saturday, 30 June 2012				
Joan Stuart	14:30 - 15:00 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2 Training Lucy McDonald / Room: Location 1 Room 1				
Kim Lewis					
E Larry Fin					
Linda Sweeney					
Mary Gall Nicole Stutts					
Pele Lolani					
Shane Carlson					
Stan Goldman					

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.

Senesys [.]			Training Manager Training Portal
Location : Main Menu Alice Talbot - [alice]			Logout
	o my options	training roadmap	
		Starling between 11 May 2012 on 11 Jul 2012 (A maximum of 5 here are shown below) View the full Training Roadmap • New Product Training (NPT001) business sponger: - A 10 Other 18 Jun 2012 - 30 Jun 2012 • Sell Learning Time (B1001) 18 Jun 2012 - 30 Jun 2012	
Ganarys Training Manager Portal 0.1.1			Copyright 🖗 2012 Silver Lining Solutions Ltd. All Rights Reserved.

A list of all of the locations is displayed in the bottom-left corner of the screen.

Senesys [™]	Training Manager Training Portal
Location : Main Menu > Room Calendar	
Alice Talbot - [alice]	Logout
room calendar	
A Required fields	
Legend	Standard View Planner View
O Scheduled Events partially or fully scheduled	Search Start Date 28 May 2012 C date 25 Jun 2012 Sort By Room C
Completed Texts to longer requiring action Concentration Concen	Information There is currently no data to show. Click on a Location in the TreeView to view all the Calendars of the Rooms at that Location, or expand any Location to view the Rooms at that Location. Click on an individual Room to view the Calendar of that Room only.
Genesys Training Manager Portal 8.1.1	Copyright © 2012 Shur Lining Solutions Ltd. All Rights Reserved.

Expand a location to reveal the individual rooms.

Senesys [.]	Training Manager Training Portal
Location : Main Menu > Room Calendar	
Alice Talbot - [alice]	Logout
room calendar	
A Required fields	
Legend	Standard View Planner View
Scheduled Events partially or fully scheduled	Search Start Dates (25 May 2012 👘 End Dates (25 May 2012 👘 Sort Bay (Foom 💌 💽
Completed	Information
Events no longer requiring action	There is currently no data to show. Click on a Location in the TreeView to view all the Calendars of the Rooms at that Location, or expand any Location to view the Rooms at that Location. Click on an individual Room to view the Calendar of that Room only.
Other Other Other entries	Individual koom to view the Lalendar of that koom only.
rooms and locations	
 internal internal internal internal internal internal internal internal internal 	
Genesys Training Manager Portal 8.1.1	Copyright @ 2012 Silver Lining Solutions Ltd. All Rights Reserved.

Select either the location or an individual room, adjust the date range if required, and then click Go to view the details.

😂 Genesys		Training Manager Training Porta
Location : Main Menu > Room Calendar		11 Ber 1 3454 1694
Alice Talbot - [alice]		Logou
room calendar		
Required fields		
egend	Standard View Planner	View
Scheduled errs partially or fully scheduled	Search	Stain Dates (28 May 2012 👘 Lind Dates (25 Jun 2012 👘 Start By Room 💌 Go
Completed	Manchester Room 1	
vents no longer requiring action	Tuneday 10 lune 2012	
Other Ther calendar entries	Click on either the	New Product Training (P07001): Day 3 of 2 (Ight Savings) Training (N07001): Day 3 of 2 (International / Room Manchester Room 1/ Attendeer 3 / Max Seating 6
ooms and locations	location name or	Raw Dodget Transaction Instituti 1, Day 7 of 7
B 1 internal	an individual	(light Servings) Team Product Training (MPTON) - Day 2 of 2 Trainer: Lucy McDonaid / Room: Manchesser Room 1 / Attendees: 3 / Mais Seating: 5
🖃 🛄 Manchester	an murvidual	
Location 1 Room 1	room.	Hight Saveings) New Product Training (NPT001) - Day Lof 2 Trainer: Daniel Oliver / Room: Marchester Room 1 / Attendees. 3 / Mar. Seating: 6
Location 1 Room 3		
External	11:00 - 11:30 GMT (New Product Training (NPTO01) - Day 1 of 2 Trainer: Dave (Dive / Incom: Mancheme Room 1 / Amendeer: 3 / Max. Seatog: 6.
	Saturday, 23 June 2012	
	07:00 - 07:30 GMT (Daylight Savings) Trainer, Lucy McDenald / Acom Mancheser Room 1 / Attendees 3 / Mail Searing 6
	Sunday, 24 June 2012	
		New Product Training (NPT001) - Day 2 of 2
	07:00 - 07:30 GMT (Darylight Savings) Trainer, Locy McDonald / Room, Manchester Room 1 / Attendees: 3 / Max, Seating, 6

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

Senesys [.]			Training Man	ager Training Porta						
Location : Main Menu > Room Calendar Alice Talbot - [alice]				Logout						
room calendar										
A Required fields										
Legend	Standard View Planner View									
Scheduled Sums partially or fully scheduled	Search	Start Date 20 May 2012	End Date 25 Jun 2012	Sort By Room 💌 🐻						
Completed	Manchester Room 1									
vents ha langer requiring action	Tuesday, 19 June 2012									
0 Other Other calendar entries	09:15 - 09:45 GMT (Daylight Savings) New Product Training (IVPT001) - Day 1 of 2 Trainer: Lucy McDoneid / Room: Minchester Ro	oom 1 / Attendees: 3 / Max, Seating: 6								
rooms and locations	Training Request : New Product Training (NPTOO) Training Event : Event 1 Manchester Lmployee ID First Name Last Name U_7005_simulator Larry Fin U_8235_Simulator Lardy Marie U_8234_Simulator Tracy Neal									
External	Wednesday, 20 June 2012									
	09:15 - 09:45 GMT (Daylight Savings) Tear Wootset Texang (WTWD) - Day 2 of 2 Tearine: Leav McGorald / Room: Manchester Room 1 / Attendess: 3 / Max. Beating: 5									
	Thursday, 21 June 2012									
	11:00 - 11:30 GMT (Daylight Savings) Hew Product Training (NPT001): Day Lef 2 Trainer: David Office / Room Lindvieter Room 1 / Attendien: 3 / Mar. Searing: 6									
	Friday, 22 June 2012									
	11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2 Trainer Daniel Oliver / Rocom Manchaster Room 1 / Attandees: 3 / Mair Seating: 6									
	Saturday, 23 June 2012									
	07:00 - 07:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2 Trainer: Lucy McDonald / Room: Manchester Ro	oom 1 / Attendees: 3 / Max. Seating: 6								
	Sunday, 24 June 2012									
	07:00 07:00 CBAT (Osudiable Coulours) New Product Training [(IPT001] - Day 2 of 2									

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.

Genesys totation : Main Menu Alice Talbot - (alice)			Training Manager Training Portal
Alice Talbot - (alice)	my options	training roadmap	Logout
	Calendars	Starting between 11 May 2012 and 11 Jul 2012	
	a manager calendar	14 meximum of 5 items are shown below)	
	agent calendar	View the full Training Roadmap	
	× room calendar	New Product Training (NPT001)	
	your working hours	Business Sponsors : A N Other	
	set your regular working hours	18 Jun 2012 - S0 Jun 2012 Self Learning Time (SLT001)	
	* set exceptions to your regular hours	18 Jun 2012 - 50 Jun 2012	
	Settings		
	change your time zone your current time zone is GMT		
Generys Training Manager Portal & 1.1			Copyright © 2012 filver Uning Solutions Ltd. All Rights Reserved.

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.

Genesys'		Training Manager Training Portal
Alice Talbot - [alice]		Logout
training roadmap		
A Required fields		
Legend		Start Date 28 May 2012 Sort By Date 💌 Go
Cick any status below to fitter by that status O Unscheduled	New Product Training (NPT001)	Monday, 18 June 2012
Events availing scheduling Completed Compl	Description & Objectives This training has been scheduled in time for a new product release on 3st November Business Sponsors A N Other Statekholders A N Other Additional Notes Additional Notes	
	Self Learning Time (SLT001)	Monday, 18 June 2012

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.

lice)			
	my options	training roadmap	
	🖬 calendars	Starting between 11 May 2012 and 11 Jul 2012	
	Manager calendar	(A maximum of 5 items are shown below)	
	 agent calendar 	View the full Training Roadmap	
	¥ room calendar	New Product Training (NPT001) Business Sponsors : A N Other	
	your working hours	18 Jun 2012 - 50 Jun 2012	
	 set your regular working hours 	Self Learning Time (SLT001)	
	set exceptions to your regular hours:	18 Jun 2012 - 30 Jun 2012	
	settings		
	change your time zone your current time zone is GMT		
	2		

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.

Information Charge the data to set your default working day: Charge the data to set your default working day: Thus highlight represents a non-working day: Used work is a working day: Used work is a work is a working day: Used work is a wor
Set Your Regular Working Hours Information Charge the data to set your default working days and hours. This highlight represents a non-working day. Day Of Week Start Time End Time to a Working Day Monday OF OF OF 199 OF I Wednesday OF OF 199 OF I Wednesday OF OF 199 OF I Saturday Saturday Saturday I
Information Charge the data to set your default working days and hours. This highlight represents a non-working day. Day Of Week Start Time End Time Is a Working Day Monday OR ON SPOR U Monday OR ON SPOR U Weenesday OR ON SPOR U Weenesday OR ON SPOR U Saturday Saturday Saturday Saturday
Change the data to set your default working days and hours. This highlight represents a non-working day. Wednesday Thursday Saturday Sunday
hours. This highlight represents a non-working day. Tuesday 11 m 00 m 22 m 00 m 12 Wednesday 07 m 00 m 19 m 00 m 12 Thursday 07 m 00 m 19 m 00 m 12 Saturday Sanday
Tuesday 11 m 00 m 22 m 00 m 9 Wednesday 07 m 00 m 39 m 00 m 9 Thursday 07 m 00 m 19 m 00 m 9 Friday 07 m 00 m 19 m 00 m 9 Saturday Sunday
Thursday Of a OO a 19 a OO a V Friday Of a OO a second value of a V Saturday Sunday
Friday or Vince Is Vince V Saturday Sunday
Friday or Vince Is Vince V Saturday Sunday
Sunday 🖸
Sunday 🖹
Sm
Save

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.

Location : Main Menu > Set Working Days Alice Talibot - [alice] Set Exceptions To Your Regular Information Change the data below to set your default working days and hours. This highlight represents a non-working day. Important Please do not use this form to define periods of	Day of Week U Fri 1	g Hours Month/Year: se Default Hours		2012 💌						
Set Exceptions To Your Regular Information hange the data below to set your default working days nd hours. his highlight represents a non-working day. Important	Day of Week U Fri 1	Month/Year: se Default Hours								
 Information thange the data below to set your default working days and hours. his highlight represents a non-working day. Important 	Day of Week U Fri 1	Month/Year: se Default Hours								
nange the data below to set your default working days d hours. IIs highlight represents a non-working day.	Fri 1	se Default Hours								
nd hours. his highlight represents a non-working day. Mumportant	Fri 1		Start Time							
This highlight represents a non-working day. A Important				End Time	Is a Working Day	Day of Week	Use Default Hours	Start Time	End Time	Is a Working Day
🔺 Important		V.	07 🔻 00 💌	19 - 00 -	\lor	Sat 16				
	Sat 2					Sun 17				
	Sun 3					Mon 18	\checkmark	07 💌 00 💌	19 💌 00 💌	V
scheduled absence (e.g. Holidays, Training Days) where	Mon 4	1	07 💌 00 💌	19 🔻 00 💌	V	Tue 19	\checkmark	11 💌 00 💌	22 💌 00 💌	V
you would otherwise be working. This form is for specifying UNPAID, NON-WORKING time	Tue 5	\checkmark	11 💌 00 💌	22 💌 00 💌	\checkmark	Wed 20	\checkmark	07 💌 00 💌	19 👻 00 💌	1
nly.	Wed 6	\mathbb{V}	07 💌 00 💌	19 🔻 00 💌	\lor	Thu 21	\checkmark	07 💌 00 💌	19 💌 00 💌	V
	Thu 7	\checkmark	07 💌 00 💌	19 🔻 00 💌	\checkmark	Fri 22	\checkmark	07 💌 00 💌	19 👻 00 💌	1
	Fri 8	1	07 💌 00 💌	19 💌 00 💌	\checkmark	Sat 23				
	Sat 9					Sun 24				
	Sun 10					Mon 25	V	07 💌 00 💌	19 👻 00 👻	V
	Mon 11	V	07 💌 00 💌	19 💌 00 💌	\checkmark	Tue 26	\checkmark	11 💌 00 💌	22 💌 00 💌	1
	Tue 12	$\overline{\mathbf{v}}$	11 🔻 00 💌	22 🔻 00 💌	\checkmark	Wed 27	v	07 💌 00 💌	19 🔻 00 💌	1
	Wed 13	\lor	07 💌 00 💌	19 💌 00 💌	\checkmark	Thu 28	\checkmark	07 💌 00 💌	19 💌 00 💌	1
	Thu 14	\forall	07 🔻 00 💌	19 🔻 00 🔻	\checkmark	Fri 29	\checkmark	07 💌 00 💌	19 💌 00 💌	1
	Fri 15	1	07 👻 00 👻	19 - 00 -	\checkmark	Sat 30				

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.

Senesys [.]									Training	Manager
.ocation : Main Menu > Set Working Days									0	Ū
Alice Talbot - [alice]										
et Exceptions To Your Regula	ar Worki	ng Hours								
Information		Month/Year:	June 💌	2012 💌						
hange the data below to set your default working days nd hours.	Day of Week	Use Default Hours	Start Time	End Time	Is a Working Day	Day of Week U	Jse Default Hours	Start Time	End Time	Is a Working Day
This highlight represents a non-working day.	Fri 1	V	07 💌 00 💌	19 🔻 00 💌	\checkmark	()at 16				
🔺 Important	Sat 2					Sun 17				
Please do not use this form to define periods of	Sun 3					Mon 18	\checkmark	07 🔻 00 💌	19 💌 00 💌	V
cheduled absence (e.g. Holidays, Training Days) where ou would otherwise be working.	Mon 4	1	07 - 00 -	19 - 00 -	\checkmark	Tue 19	\checkmark	11 - 00 -	22 🔻 00 🔻	V
his form is for specifying UNPAID, NON-WORKING time nly.	Tue 5	1	11 - 00 -	22 🔻 00 🔻	\checkmark	Wed 20	\checkmark	07 🔻 00 🔻	19 🔻 00 🔻	\checkmark
ny.	Wed 6	1	07 - 00 -	19 - 00 -	\checkmark	Thu 21	√	07 - 00 -	19 🔻 00 🔻	V
	Thu 7	1	07 - 00 -	19 - 00 -	\checkmark	Fri 22	V	07 🔻 00 🔻	19 🔻 00 🔻	V
	Fri 8	V	07 👻 00 👻	19 🔻 00 🔻	7	Sat 23				
	Sat 9					Sun 24	7			
	Sun 10					Mon 25	1	07 🔻 00 💌	19 🔻 00 💌	
	Mon 11	7	07 ¥ 00 ¥	19 🔻 00 👻	7	Tue 26		11 🔻 00 🔻	22 💌 00 💌	✓
	Tue 12	V	11 × 00 ×	22 - 00 -	1	Wed 27	 ✓ 	07 - 00 -	19 ¥ 00 ¥	V
	Wed 13	V	07 ¥ 00 ¥	19 × 00 ×	V.	Thu 28 Fri 29	v V	07 • 00 •	19 ¥ 00 ¥	
	Thu 14	V	07 - 00 -	19 ¥ 00 ¥	1		V	07 • 00 •	19 • 00 •	
	Fri 15	4	07 + 00 +	19 + 00 +	V	Sat 30	V			
	Save				/		-			
				C	lear for	the				
				re	equired	aate.				
resys Training Manager Portal S.1.1									Conve	ight © 2012 Silver Lining