

Genesys Training Manager 8.1.1

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

This document is valid only for the 8.0 releases of this product.

Note:For versions of this document created for other releases of this<br/>product, visit the Genesys Technical Support website, or request the<br/>Documentation Library DVD, which you can order by e-mail from<br/>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 page 8.

## **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, the reason for the training, the room, the trainer, and any pretraining work if required. Trainers update attendance through their online attendance register, which they access directly through their Web portal. This automatically updates Training Manager with the attendees, 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 <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 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	<ul> <li>Document titles</li> <li>Emphasis</li> <li>Definitions of (or first references to) unfamiliar terms</li> </ul>	Please consult the <i>Genesys</i> <i>Migration Guide</i> for more information. Do <i>not</i> use this value for this option.

	Mathematical variables	A customary and usual practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x 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.</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></confighost>



# **Web Portal Trainer Manager**

## **The Trainer Manager**

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

The trainer manager has access to:

- trainer calendar
- view other trainer's calendars
- room calendar
- set your regular working hours
- change your time zone
- training roadmap

Depending on how the webportal is accessed a login may be required.

Genesys Location : Login		Genesys Training Manager Portal
Welcome To login, ente	r your User Name and Password below	
	These details are case-sensitive   Enter Your Details   User Name   Password   Continue	
Genesys Training Manager Porta	811	Copyright © 2012 Silver Lining Solutions Ltd, All Rights Reserved.

When logging in for the first time, a time zone must be selected from the drop down box. This will ensure that any scheduled training activity is recorded in the correct working time zone. If the wrong time zone has been selected, or the configuration is incorrect in Training Manager, then training sessions will show incorrect times. Select Continue to either access the Home page or login.

The option to change the time zone in the future is available on the home page under settings.

Senesys:	Training Manager Training Portal
Location : Main Menu > Change Time Zone Rachel O'Neill - [rachel]	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.	
GMT Continue	
Genesya Training Manager Partal 8.1.1	Copyright © 2012 Silver Lining Solutions Ltd. All Rights Reserved.

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 been scheduled and approved.

Genesys			Training Manager Training Portal
Rachel O'Neill - [rachel]			Logout
	o my options	training roadmap	
	calendars	Starting between 11 May 2012 and 11 Jul 2012	
	* trainer calendar	(A maximum of 5 items are shown below)	
	<ul> <li>view other trainer's calendars</li> </ul>	View the full Training Roadmap	
	¥ room calendar	V New Product Training (NPT001)	
	your working hours	Business Sponsors : A N Other	
	<ul> <li>set your regular working hours</li> </ul>	18 Jun 2012 - 30 Jun 2012 Self Learning Time (SLT001)	
	settings	18 Jun 2012 - 30 Jun 2012	
	<ul> <li>change your time zone</li> <li>your current time zone is GMT</li> </ul>		
Genesys Training Manager Portal 8.1.1			Copyright E 2012 Silver Lining Solutions Ltd. All Rights Reserved.

# **My Options**

### **Trainer Calendar**

Clicking trainer calendar will present the trainer calendar view, and by default, the Standard View tab is displayed.



Senesys <sup>a</sup>		Training Manager Training Portal
Location : Main Menu > Trainer Calendar		
Rachel O'Neill - [rachel]		Logout
trainer calendar		
🛆 Required fields		
Legend	Standard View Planner View	
Events partially or fully scheduled	Search Start Date 28 May 2012	End Date 25 Jun 2012
Completed	Information	
Other Other calendar entries	There is currently no data to show. Select one or more trainer from the treeview to view all the report for all of those trainers. Ex	pand any location to view the trainers at that location.
Trainer selection		
KNe Location> Include London A Rachel O'Neill [rachel] Manchester A Daniel Oliver [daniel] A Rachel O'Neill [rachel] External	View by Location view	
Generys Training Manager Fortal 8.1.1		Copyright © 2012 Silver Lining Solutions Ltd. All Rights Reserved.

There are four options available for the trainer manager to view the trainers who report to him or her, and the scheduled training activity of those trainers:

- View by Location
- View by Home Location
- View by Alphabetical Order
- View by Hierarchy

View by Location presents the locations in the bottom-left corner of the screen. Expand the location to view the associated trainers.

Select a trainer to view his or her calendar, modify the date range as required, and then click 60.

This will list all of the scheduled activities for the selected trainer within the date range.

Senesys:		Training Manager Training Portal
Location : Main Menu > Trainer Calendar		
Rachel O'Neill - [rachel]		Logout
trainer calendar		
🖄 Required fields		
Legend	Standard View Planner View	
Cheduled (vents partiely or fully scheduled)	Search Start Date 20 May 2012	End Date 25 Jun 2012
Completed Events no longer requiring action	Go to Advanced Search Daniel Oliver	
Other Other calendar entries	Monday, 11 June 2012 OB:30 - 17:00 GMT (Daylight Savings) Holiday	
trainer selection		
View by Location     View by Home Location     View by Alphabetical Order	Tuesday, 12 June 2012 08:30 - 17:00 GMT (Daylight Savings) Holiday	
View by Aphabetical Order	Thursday, 21 June 2012	
Select All   Unselect All	11:00 - 11:30 GMT (Daylight Savings) Here Product Training (107001) - Day 1 of 2 Trainin: Daniel Oliver / Room, Marchester Room 1 / Attendees, 3 / Mar. Seating, 6	
Internal <no location=""></no>	Friday, 22 June 2012	
🖃 📠 Landon	11:00 - 11:30 GMT (Daylight Savings) New Product Training (107003) - Day 3 of 2 Training: Daniel Oliver / Room: Manchester Room 1 / Atlandees: 3 / Max. Seating: 6	
Bachel O'Neill [rachel]     Manchester	Monday, 25 June 2012	
Manchester     Machester     Machester	13:00 - 13:30 GMT (Daylight Savings) Trans. Devel Over (North Marchatter Room 1/ Attendee: 5 / Marc Sector; 6	
EA Richel O'Neill [rachel]		
External		
	aniel Oliver	
Se Se	lected	
Genesys Training Manager Portal 8.1.1		Copyright @ 2012 Silver Uning Solutions Ltd. All Rights Reserved.

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

- **Scheduled** The training is partially or fully scheduled, and the agents will have this training scheduled in Genesys WFM.
- **Completed** The training has been completed, and this activity is listed for information only.
- Other This is for an activity other than training that the trainers have scheduled—for example, a holiday or meeting.

View by Hierarchy presents the trainer manager with the option to view any trainers who report to him or her.

Expanding the hierarchy and selecting the required trainer together with the relevant date range will reveal any scheduled training activity. The trainer manager can also view his or her own activity by selecting himself or herself and the relevant date range.

Senesys	Training Manager Training Portal
Location : Main Menu > Trainer Calendar	
Rachel O'Neill - [rachel]	Logout
trainer calendar	
A Required fields	
Legend	Standard View Planner View
Scheduled Events partially or fully scheduled	Search Se
Completed	Daniel Oliver
Events no longer requiring action	Monday, 11 June 2012
Other Other calendar entries	(P) 08:30 - 17:00 GMT (Daylight Savings) Holiday
trainer selection	
C View by Location	Tuesday, 12 June 2012
View by Home Location View by Ainhabetical Order	08:30 - 17:00 GMT (Daylight Savings) Holiday
View by Hierarchy	Thursday, 21 June 2012
Select All Unselect All	11:00 - 11:30 GMT (Daylight Savings) New Product Training (197001) - Day 1 of 2 Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendes: 3 / Max. Setting: 6
🖃 💷 Hierarchy	Friday, 22 June 2012
Rachel O'Neill [rachel]           Baniel Oliver [daniel]	11:00 - 11:30 GMT (Daylight Savings) Here Product Training (M9700) - Day 2 of 2 Trainers Daniel Oliver / Room Manchester Room 1 / Amandees: 3 / Max. Seating: 6
	Monday, 25 June 2012
	13:00 - 13:30 GMT (Daylight Savings) New Product Training (H97001) - Day Lof 2 Trainer: David Oliver / Room: Marchaster Room 1 / Attendeer: 5 / Max. Seating: 6
	~
Genesys Training Manager Portal 8.1.1	Copyright © 2012 Silver Uning Solutions Ltd. All Rights Reserved.

To view the training information, click the training session bar. This will expand to reveal the allocated room, together with the list of attendees and any information associated with the session—for example, whether all of the attendees completed the training.



## **Calendar Report View**

There is also the option to view any trainer activity in a calendar format by clicking the Planner View tab, as shown in the following example.

The details can be viewed by day, week, or month by selecting the relevant option.

The planner view gives the trainer manager a high-level view of his or her trainers' training activity, and the activities are color-coded for easy visibility.

In this example, one trainer has been selected.

Hovering over any scheduled training activity will reveal some information about the training.



The trainer manager has access to insert non-availability time into trainers reporting into them.

To insert non-availability time into a trainer's calendar, right-click in the calendar, and then select New entry.



The option is then available to select the required category from the drop-down list, and to specify the date and any details. If the event is for more than one consecutive day, the Recurrence option has to be used. This creates individual entries for each day in the Standard View tab.

Senesys:						Training M	anager Training Portal
Location : Main Menu > Trainer Calendar							
Rachel O'Neill - [rachel]							Logout
trainer calendar							
A Required fields							
Legend	Stands New Tr	iiner Calendar Entry					
No Category		Subject Holiday					
floliday.	Your ci St	art time 19/06/2012 • 08:30	End time 19/	06/2012 • 17:00 •			
Training Session	a 🔍 🖸 🖸	itegory: Holiday	•				Day Week Month
trainer selection	De	cription Holiday authorised				5	Sun
O View by Location O View by Home Location	22					2	3.
<ul> <li>View by Alphabetical Order</li> <li>View by Hierarchy</li> </ul>	Rec	urrence				9	10
Select All   Unselect All		/			Sine		
🖼 🔲 Hierarchy	11	12	18	14	15	16	17
🖃 🕮 🧸 Rachel O'Nell (rachel)							
🗵 👶 Daniel Oliver (daniel)	18	19	20	21	22	21	24
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	25	26	27	26	29	30	O1 Jul
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	1						
Generys Training Manager Portal & 1.1						Copyright I	0 2012 Silver Uning Solutions Ltd. All Rights Reserved

Select the relevant recurrence (for example, Daily) and an End by date, and then click Save.

Genesys		Training Manager Training Por
ocation : Main Menu > Trainer Calendar		
Rachel O'Neill - [rachel]		Log
rainer calendar		
A Required fields		In this two day holiday
egend	Stand New Trainer Calendar Entry	
to Category	Ope Subject Holiday	example the recurrence is
oliday	Your cc Start time 19/06/2012 • 08:30 • End time 19/06/2012 • 17:00 •	Daily and the end date is the
raining Session	Category: Holiday -	
	Description Holiday authorised	20 <sup>th</sup> June, which will insert
iner selection		two days holiday into the
View by Location View by Home Location		• •
liew by Alphabetical Order	I Recurrence	calendar.
View by Hierarchy	© Hourly ▲ © Every 1 ♀ day(s)	
et At   Umaket At	Doily     Overy weekday	16
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🔣 🚨 Daniel Oliver (daniel)	C Yearly	
	18	23 24
		Cancel
	25	30 01.1ul
	Here Product Transact SP200114, Seen Product Transact SP200114	

The scheduled activity will then be displayed on the Standard View tab as multiple day entries and in the Planner view.

Genesys						raining w	anager Training Po
ocation : Main Menu > Trainer Calendar							
Rachel O'Neill - [rachel]							Log
rainer calendar							
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No Category	Open in new wind	dow 🖆 Click here to Refresh					
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Fraining Session	< 🔰 today 💌	June 2012					Day Week Month
	100207			Daniel Oliver			
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ct All   Unselect All							
III Hierarchy	11	12	13	14	15	16	17
Rachel O'Neill [rachel]							
🕅 🚨 Daniel Oliver [daniel]	18	19	20	21	22	23	24
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Complete Co	Search Ga ta Advanced Search Daniel Oliver Monday, 11 June 20 08:30 - 17:0 08:30 - 17:0 08:30 - 17:0 08:30 - 17:0 108:30 - 17:0 08:30 - 17:0 08:30 - 17:0 08:30 - 17:0 08:30 - 17:0 108:30 - 17:0 109:30 - 11:0 Friday, 22 June 201 11:00 - 11:2 Monday, 25 June 20	212 20 GAT (Daylight Savings) 1 20 GAT (Daylight Savings) 1 212 20 GAT (Daylight Savings) 1 212 20 GAT (Daylight Savings) 1 20 GAT (Daylight Savings) 1 2 2 30 GAT (Daylight Savings) 1 2 30 GAT (Daylight Savings) 1 31	Holiday - Holiday - Holiday - New Poolest Training (197003) - De Trainer Daniel Orien / Josep March Trainer Daniel Orien / Room March	e 1 or 1 effer Room 1 / Attendent 1 / Nor effer Room 1 / Attendent 3 / Nor effer Room 1 / Attendent 3 / Nor	Seeing 6	Training M	anager Training Po
Complete Comparison Complete	Search Ga ta Advanced Search Daniel Oliver Monday, 11 June 20 08:30 - 17:0 08:30 - 17:0 08:30 - 17:0 08:30 - 17:0 108:30 - 17:0 08:30 - 17:0 08:30 - 17:0 08:30 - 17:0 08:30 - 17:0 108:30 - 17:0 109:30 - 11:0 Friday, 22 June 201 11:00 - 11:2 Monday, 25 June 20	212 20 GMT (Daylight Savings) 1 212 20 GMT (Daylight Savings) 1 212 20 GMT (Daylight Savings) 1 212 20 GMT (Daylight Savings) 1 212 213 214 215 215 215 215 215 215 215 215	Holiday - Holiday - Holiday - New Poolest Training (197003) - De Trainer Daniel Orien / Josep March Trainer Daniel Orien / Room March	e 1 or 1 effer Room 1 / Attendent 1 / Nor effer Room 1 / Attendent 3 / Nor effer Room 1 / Attendent 3 / Nor	Seeing 6	Training M	anager Training Po
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## **Home Location View**

Senesys <sup>.</sup>	Training Manager Training Portal
Location : Main Menu > Trainer Calendar	
Rachel O'Neill - [rachel]	Logout
trainer calendar	
A Required fields	
Legend	Standard View Planner View
<ul> <li>Scheduled</li> <li>Events sentially or fully scheduled</li> <li>Completed</li> </ul>	Scarch Start Dave 20 May 2012 End Dave 25 Jun 2012 Sort By Trainer in Cost
Events no longer requiring action Other Other Coher calendar entries	Monday, 11 June 2012 19:00 GMT (Daylight Savings) Holiday
View by Location View by Location View by Home Location View by Alphabetical Order	Tuesday, 12 June 2012 08:30 - 17:00 GMT (Daylight Savings) Holiday
View by Hierarchy Select All   Unselect All	Tuesday, 19 June 2012 08:30 - 17:00 GMT (Daylight Savings) Holiday
Internal     No Location>     London	Wednesday, 20 June 2012 08:30 - 17:00 GMT (Daylight Savings) - Holiday
Achel O'Neill [rachel]     Anchester     Anchester     Anchester	Thursday, 21 June 2012 Thursday, 21 June 2012 New Product Training (MPT003)- Owy 1 of 2 Tailor - Tailor Own (Source David Own / Source Management Source 1 / Attances and 1) /
① External	Friday, 22 June 2012
	11:00 - 11:30 GMT (Davylight Savings) Traine: Devid Once / Room, Manchester Room 1 / Attendees: 3 / Max. Seating. 6 Monday, 25 June 2012
	13:00 - 13:30 GMT (Daylight Savings) New Product Training (197003) - Day 3 of 2 Training: David Clover / Room 1 / Attandeer: 5 / Mar. Setting: 6

## **Alphabetical View**



## **Advanced Search Option**

There is now a Go to Advanced Search option available on the Standard View tab.

Click Go to Advanced Search and select Advanced Search, and a table appears in the bottom-left corner of the screen.

Genesys	Training Manager Training Portal
Rachel O'Neill - [rachel]	Logout
trainer calendar	
A Required fields	
Legend	Standard View Planner View
Completed	Search Start Date (26 May 2012 End Date (25 Jun 2012 Son By Trainer Control of Control o
Events no longer requiring action	Information
Other Other calendar entries	There is currently no data to show. Select one or more trainer from the treeview to view all the report for all of those trainers. Expand any location to view the trainers at that location.
trainer selection	
<ul> <li>View by Location</li> <li>View by Home Location</li> <li>View by Alphabetical Order</li> <li>View by Hierarchy</li> </ul>	
Select All   Unselect All	
O Internal     Oner (daniel)     Aniel Oliver (daniel)     Acchel O'Nell (rachel)     External	
Genesys Training Manager Portal 8.1.1	Copyright © 2012 Stiver Linking Solutions Ltd. Att Rights Reserved.

There are different options available to search for a trainer who matches the required criteria.



Select the relevant criteria to search against, and then the Match ANY criteria and Match ALL criteria options are available for selection in the drop-down list. Select an option, and then click Get Trainers.

Categories	Locations	Skills		
Microsoft Excel  Microsoft Word  Microsoft PowerPoint  Microsoft Outlook				
Match ANY Criteria 🔽 Get Trainers				
-Match ALL Criteri				

Any trainers who match the criteria will then be presented.

Select the required trainer and date filter to view the trainer's calendar.

Senesys <sup>a</sup>	Genesys	
Location : Main Menu > Trainer Calendar > Trainer Calend	dar (Advanced Search)	
Rachel O'Neill - [rachel]		Logout
trainer calendar		
Required fields		
Legend	Standard View Planner View	
O Scheduled Events partially or fully scheduled	Search Start Devs [20 May 2012	End Date 25 Jun 2012
Completed Events no longer requiring action	Resum to Basic Search  Daniel Oliver	
0 Other Other calendar entries	Monday, 11 June 2012 08:30 - 17:00 GMT (Daylight Savings) Holiday	
trainer selection	Tuesday, 12 June 2012	
Categories Locations Managers Skills	08:30 - 17:00 GMT (Daylight Savings) Holiday	
Microsoft Excel     Microsoft Word     Microsoft PowerPoint	Tuesday, 19 June 2012 08:30 - 17:00 GMT (Daylight Savings) Holiday	
Microsoft Outlook	Wednesday, 20 June 2012	
Match ANY Criteria  Get Trainers trainer list	08:30 - 17:00 GMT (Daylight Savings) Holiday	
2 Daniel Oliver	Thursday, 21 June 2012           Itursday, 21 June 2012         New Product Training (HPT051) - Day 1 of 2           Itursday         Itursday         Training The PT0511 - Day 1 of 2           Itursday         Itursday         Itursday         Itursday	
	Friday, 22 June 2012	
	I1:00 - 11:30 GMT (Daylight Savings)     Traine: Dark Over / Room: Marchane Room 1 / Attenden: 3 / Mar. Serving 4      Monday, 25 June 2012	
	New Product Training (MPT001) - Day 1 of 2  13:00 - 13:30 GMT (Daylight Savings)  New Product Training (MPT001) - Day 1 of 2  Training: Daried Oliver / Room (Manchester Room 1 / Attendest: 5 / Max Seating 6	
lenesys Training Manager Portal 8.1.3		Copyright © 2012 Silver Lining Solutions Ltd. All Rights Reserved.

## **Room Calendar**



To view the room calendar, click room calendar on the home page.

A list of locations is then displayed in the bottom-left corner of the screen, and there will be the option to expand the tree view if there are any rooms associated.

Expand the location to reveal any associated rooms.

Index Value Under Store       Index Value Under Store <th>Senesys<sup>.</sup></th> <th>Training Manager Training Portal</th>	Senesys <sup>.</sup>	Training Manager Training Portal
Image: Completed fields		
A required fields  Legend  Schedued Levert partagy or fully schedued Levert partagy or fully schedued Levert partagy or fully schedued Cevert partage Ce		Logout
Legend Scheduld Sundard View Planner View Search Search	room calendar	
Scheduled tweets partagy or fully scheduled fuents to longer reaching action completed fuents actions Search Search Search Completed fuents to longer reaching action completed actions Search Search Search Completed fuents to longer reaching action completed actions Search Search Search Completed fuents actions Search Search Search Completed fuents actions Search Search Search Search Completed action on 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.	A Required fields	
Completed   Events not longer reaching actions   Compression and locations   Image: Control   Control   Image: Control   Subset: To buse Los MAL, Old   Image: Control   Subset: To buse Los MAL, Old   Image: Control   Image: Control I	Legend	Standard View Planner View
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. 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. 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.		Search Start Darle 205 May 2012 📰 Brd Darle 225 Jun 2012 📰 Sort By Room 🖃 Go
Other     Comer calendar entres      Comer	Completed	Information
Other       Other Conservations       rooms and locations       Image: State Conservation of the State Room 1       Image: State Room 2       Image: Manchester Room 3		
rooms and locations		
Control		
Generys Training Manager Portal 8.1.1 Copyright © 2012 Silver Uning Solutions Ltd. All Rights Reserved.	London     Manchester     Manchester Room 1     Manchester Room 2     Manchester Room 3     Extensi	

Select either a location or a room to view its activity. In the example below Manchester Room 1 has been selected.

Senesys:		Training Man	ager Training Portal
Location : Main Menu > Room Calendar			
Rachel O'Neill - [rachel]			Logout
room calendar			
A Required fields			
Legend	Standard View Planner View		
Scheduled Events partially or fully scheduled	Search Search Search	2012 End Date 25 Jun 2012	Sort By Room T
Completed	Manchester Room 1		
Events no longer requiring action	Tuesday, 19 June 2012		
Other Other calendar entries	09:15 - 09:45 GMT (Daylight Savings) Trainer: Uxy McDonad / foom: Manchester Room 1 / Attendeet: 3 / Max. Seating: 6		
rooms and locations	Wednesday, 20 June 2012		
🗉 🕕 Internal	09:15 - 09:45 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2 Trainer: Lucy McConet / Acom Manchester Room 1 / Attendeet: 1 / Max. Seating 6		
E A London	Thursday, 21 June 2012		
Manchester Room 1	New Product Training (NPT001) - Day 1 of 2		
Manchester Room 2 Manchester Room 3			
External	Friday, 22 June 2012 New Product Training (NPT001) - Gay 2 at 2		
	11:00 - 11:30 GMT (Daylight Savings) Trainer Danel Oliver / Ilcom: Manchester Ilcom: 1 / Attendeer: 3 / Max Seating: 6		
	Saturday, 23 June 2012		
	07:00 - 07:30 GMT (Daylight Savings) New Product Training (NPT001) - Oay 1 of 2 Training Lucy McConsol (Room: Machineter Room 1 / Attendees: 3 / Machineter Room 1 / Attendees: 3 / Machineter		
	Sunday, 24 June 2012		
	New Product Training (NPT001) Ouy 2 of 2		
	07:00 - 07:30 GMT (Daylight Savings) Trainer: Lucy McDonad / Room Manchester Room 1 / Attendeer: 3 / Marc Seating 6		
	Monday, 25 June 2012		
	13:00 - 13:30 GMT (Daylight Savings) New Perdout Training (MPT001) - Day Let 2 Training DMPT001 - Day Let 2 Training DMPT001 - Day Let 2		
	15:00 - 15:30 GMT (Daylight Savings) New Product Training (NP7001). Day 1 of 2 Trainer: Lucy McDonato / Incom: Manchester Ricom 1 / Attendeer: 3 / Max. Seating 6		
neoys Training Manager Portal 8.1.1		Copyright @ 2011	2 Silver Lining Solutions Ltd. All Rights Reserved.

Click one of the training session bars to reveal the training details, including the trainer and the scheduled attendees.

Genesys:	Training Manager Training Portal
Rechel O'Nelli (rachel)  Rechel O'Nelli (rachel)  Click on the bar to reveal the detail.  Le	Standard View Planner View Search Search Marchester Hoom 1 Tuesday, Tolune 2012 Marchester Hoom 1 Tuesday, Tolune 2012 Marchester Hoom 1 Tuesday, Tolune 2012 Transi Log McConsid / Komit Marchester Room 1 (Marchester Room 1 Employee ID First Name Los Name Up05, Simulation Lany Marchester Room 1 Employee ID First Name Los Name Up05, Simulation Lany Marchester Room 1 Employee ID First Name Los Name Up05, Simulation Lany Marchester Room 1
Manchester Room 2 Manchester Room 3	U_8335_Simulator Lindsay Marie U_9234_Simulator Tracy Neal Wednesday, 20 June 2012 Mem Product Training (MT001)-Day 2 of 2 O9:15-09:45 GMT (Daylight Savings) Trainer Low McDanal / Same Technology and 2
	Thursday, 21 June 2012 II:00 - 11:30 GMT (Daylight Savings) Here Product Training (I#1001) - Day Lof 2 Training Direction Cover / Room 1 / Attendent 2 / Mar. Seating 6 Friday, 22 June 2012 Here Product Training (I#1001) - Day 2 of 2
	Saturday, 23 June 2012 Trainer: Log McDonald / Annotation (107001 - Day 1 of 2 Trainer: Log McDonald / Annotation (107001 - Day 1 of 2 Trainer: Log McDonald / Annotation Annotation (107001 - Day 1 of 2 Trainer: Log McDonald / Annotation (107001 - Day 1 o
Genesys Training Manager Portal 8 1 1	RT-RD_RT-2D (GRT RTwillink Challeng) The relation to All Rights Reserved.

## **View Other Trainers' Calendars**

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



The trainer calendar view appears. A list of available trainers will appear at the left hand side.

Select the required trainer and then click on Go to view their activity. There is also the option to view the activity in the Planner view.

Genesys: Location : Main Menu > Trainer Calendar (Re Rachel O'Noill - [rachel] trainer calendar	ed Only		Ti	Click on Go to view activity	Portal Logout
Required fields	Standard View Planner View				
<ul> <li>Scheduled</li> <li>Lvents partially of fully scheduled</li> <li>Completed</li> <li>Events no longer requiring action</li> <li>Other</li> </ul>	Search U tocy McDonald Tuesday, 19 June 2012	odust Training (HPT001) - Day 1 of 2	Start Date 28 May 2012	d Date 25 Jun 2012 Sort By Traine	60
Constructions entries Lrainer selection View by Home Location View by Home Location View by Home Location View by Hierarchy Seter All [University Seter All [University] Seter All [University	Select the required trainer from the list available.	Licey McEbonald / Iloom: Manchester Room 1 / Attendeec: Isoly McEbonald / Room: Manchester Room 1 / Attendeec:	3/Max Seating: 6 2/Max Seating: 6 3/Max Seating: 6		
Genergy Training Manager Portal 6.1.1				Copyright & 2012 Silver Lining Solutions Ltd. A	48 Rights Reserved.

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

Senesys <sup>®</sup>			Training Man	ager Training Porta
Location : Main Menu > Trainer Calendar (Read Only) Rachel O'Neill - [rachel]				Logout
trainer calendar				
🖄 Required fields				
Legend	Standard View Planner View			
O Scheduled	Search	Start Date 28 May 2012	End Date 25 Jun 2012	Sort By Trainer 💌 🐻
Completed Events to longer requiring action	C Ince McDonald Tuesday, 19 June 2012			
Other Other calendar entries	09:15 - 09:45 01 (Daylight Savings) New Product Training (NP7001) - Day 1 of 2 Trainer: Locy McConald / Room. Marchetter Room 1 / Attendee	n: 3 / Max. Seating: 6		
trainer selection  View by Location  View by Home Location  View by Hierarchy  Seted All Unseed Al  Daniel Oliver [daniel]  Daniel Oliver [daniel]  Active Constit [lucy]  Active Constit [lucy]  External	Training Request: New Product Training (NPT001) Training Event: Event 1 Training Event: Event 1 Room: Manchester Room 1 Employee ID First Name Last Name U_2005_Simulator Larry Fin U_8234_Simulator Tracy Neal U_8234_Simulator Tracy Neal No Attendency/Completion Recorden Wednesday, 20 June 2012 09:15 - 09:45 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2 Trainer: Lay McDoard / Room Manchester Room 1 / Attendent Sunday, 24 June 2012 07:00 - 07:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2 Trainer: Lay McDoard / Room Manchester Room 1 / Attendent Sunday, 24 June 2012 07:00 - 07:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2 Trainer: Lay McDoard / Room Manchester Room 1 / Attendent Sunday, 25 June 2012 Mere Product Training (NPT001) - Day 2 of 2 Trainer: Lay McDoard / Room Manchester Room 1 / Attendent Sunday, 25 June 2012 Mere Product Training (NPT001) - Day 2 of 2 Trainer: Lay McDoard / Room Manchester Room 1 / Attendent Sunday, 25 June 2012 Mere Product Training (NPT001) - Day 2 of 2 Trainer: Lay McDoard / Room Manchester Room 1 / Attendent Monday, 25 June 2012 Mere Product Training (NPT001) - Day 2 of 2 Trainer: Lay McDoard / Room Manchester Room 1 / Attendent Monday, 25 June 2012 Mere Product Training (NPT001) - Day 2 of 2 Trainer: Lay McDoard / Manchester Room 1 / Attendent Mere Product Training (NPT001) - Day 1 of 2 Trainer: Lay McDoard / Manchester Room 1 / Attendent Mere Product Training (NPT001) - Day 1 of 2 Trainer: Lay McDoard / Manchester Room 1 / Attendent Mere Product Training (NPT001) - Day 1 of 2 Trainer: Lay McDoard / Manchester Room 1 / Attendent Mere Product Training (NPT001) - Day 1 of 2 Trainer: Lay McDoard / Manchester Room	n: 3/Mai, Seeling: 6		
resys Training Manager Portal 8.1.1			Copyright @ 2012	Silver Lining Solutions Ltd. All Rights Reserve

## Set Your Regular Working Hours

The working hours of trainers are kept up to date in Training Manager by clicking set your regular working hours on the home page. This may not be necessary for the trainer manager if he or she will not be scheduled to deliver any training.

Scores			Training Manager Training Portal
Senesys <sup>®</sup>			fraining Manager fraining Portai
Location : Main Menu			
Rachel O'Neill - [rachel]			Logout
	my options	training roadmap	
	Calendars	Starting between 11 May 2012 and 11 Jul 2012	
	u trainer calendar	(A maximum of 5 items are shown below)	
	<ul> <li>view other trainer's calendars</li> </ul>	View the full Training Roadmap	
	¥ room calendar	New Product Training (NPT001)	
		Business Sponsors : A N Other	
	<ul> <li>set your regular working hours</li> </ul>	16 Jun 2012 - 30 Jun 2012 Self Learning Time (SLT001)	
	S settings	18 Jun 2012 - 30 Jun 2012	
	change your time zone your ourrent time zone is GMT		
	Your purrent time zone is GMT		
	(and and		
	-		
Genesys Training Manager Portal 8.1.1			Copyright © 2012 Silver Uning Solutions Ltd. All Rights Reserved.

The current default hours that Training Manager will use for scheduling will then be presented. If any changes have to be made, use the drop-down lists to select the correct times for the appropriate day. This procedure should not be used to exclude dates and times because of holidays, because these are entered by using the instructions in the 'Trainer Calendar' section. The hours entered are then immediately updated in Training Manager and are visible for the trainer.

Genesys		Training Manager Training Porta
Securities I friend Warry - Set Warring Say Detauts. Resched (D'Next) = [mached]		Lapor
Set Your Regular Working Ho	urs	
Information	Dep Of Week Inter Time Ded Time Berleat Lanch Det Latent Lanch Ded	
Change the data to set your default working data and		
Use the drop		
-		
down box to		
select the	Fully as the time of the time	
ſ	III I COMPANY CONTRACTORS CONTRACTORS	
amended	1	
working hours.	12 13 14 15 16 17 17 18 18 18 18 18 18 18 18 18 18 18 18 18	
n oning no and	14	
	96 17	
	15. 79	
	20 25	
	23	
many Transing Manager Party 8.1.1		Canorget & 2012 Mar Long Sautore UK At Ages Rearies

## **Training Roadmap**

Click view the full training roadmap on the home page. (The latest scheduled training will be visible on the home page under training roadmap.)



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

The training sessions can also be filtered by using the Sort By drop-down list.

Senesys:		Training Manager Training Portal
Location : Main Menu > Training Roadmap Rachel O'Neill - [rachel]		Logout
training roadmap		Stram Dans (26 May 2012 7 Ind Dans (25 Jun 2012 7 Son By 🍞 💌 🙆
Oldk any status below to filter by that status	New Product Training (NPT001)	Monday, 18 June 2012
Conscrete/stading Conscrete/stading Scheduled Events sentally or fully scheduled Completed Liverts no longer requiring action Coher coher cellendar envira. Show All	Description & Objectives This training has been scheduled in time for a new product velease on 1st Now Business Sponsors A N Other Stakeholders A N Other Additional Notes Additional Notes	Click on the bar to reveal any training detail. There is also the filter option available.
	Self Learning Time (SL1001)	Monday, 18 June 2012
Generys Training Manager Portal 8.1.1		Copyright @ 2012 Silver Lining Solutions Ltd. All Rights Reserved.