Genesys Training Manager 8.1.1

Web Portal Administrator Guide

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About Genesys

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Table of Contents

Preface 5

About Genesys Training Manager 5

Intended Audience 6

Making Comments on This Document 6

Contacting Genesys Technical Support 6

Related Documentation Resources 6

Document Conventions 7

Document Version Number 7

Screen Captures Used in This Document 7

Type Styles 8

Web Portal Administrator 9

The Administrator 9

My Options 13

Permissions Management 14

Import Manager Details 18

Import Completion Status Data 21

Utilisation Report 24

Training Roadmap 26

Preface

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

This document is valid only for the 8.1 releases of this product.

Note:	For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by email from Genesys Order Management at orderman@genesyslab.com.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 7.

About Genesys Training Manager

Genesys Training Manager enables companies to create, manage, and schedule multiple agent training activity and team meetings and one-on-ones automatically in Genesys WorkForce Management (WFM). The training scheduling process can include rooms and trainers or any combination of agent, room, and training. For team meetings and one-on-ones, this automatically includes the manager. A browser-based web portal comes as part of the application, allowing visibility of the scheduled training and meeting activity together with any other details available; for example, reason for the training, room, trainer, and any pre-training work if required. The trainer updates attendance through their online attendance register, which they access directly through their web portal. This automatically updates Training Manager with who has attended; if there were any non-attendees they can be "mopped up" automatically as part of the scheduling process.

Intended Audience

This document is primarily intended for system administrators or other individuals who need to manage user access to the webportal or need to view training activity scheduled in Genesys Training Manager.

Making Comments on This Document

If you especially like or dislike anything about this document, feel free to email your comments to Techpubs.webadmin@genesyslab.com.

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

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

Contacting Genesys Technical Support

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

Related Documentation Resources

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

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

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

Document Conventions

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

Document Version Number

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

42gp_icg_aspect-wfm_08-2010_v4.2.001.01

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

Screen Captures Used in This Document

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

Type Styles

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

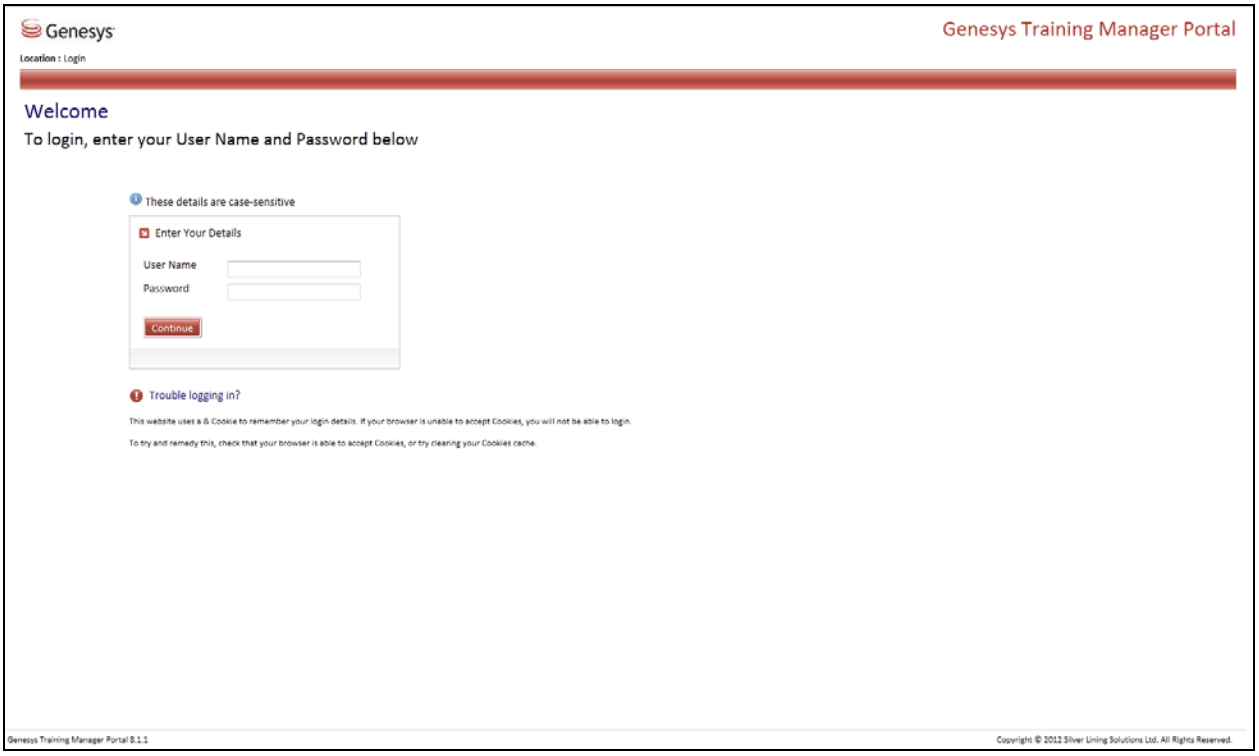
Type Styles

Type Style	Used For	Examples
Italic	Document titles Emphasis Definitions of (or first references to) unfamiliar terms Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets below).	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular 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.	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. values.	`smcp_server -host <confighost>`

Web Portal Administrator

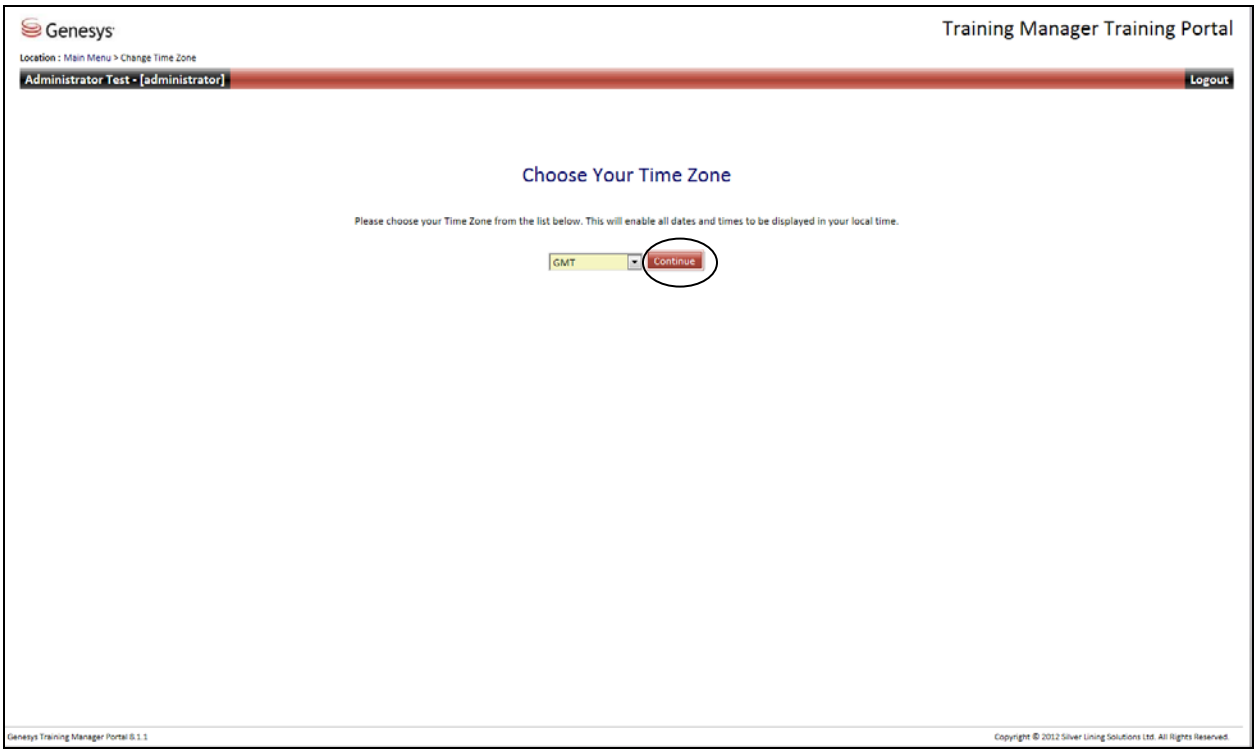
The Administrator

Depending on how the webportal is accessed a login may be required. If the example screen below is presented, then use your surname for `User Name` and the word password for `Password`.



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 access the Home page.

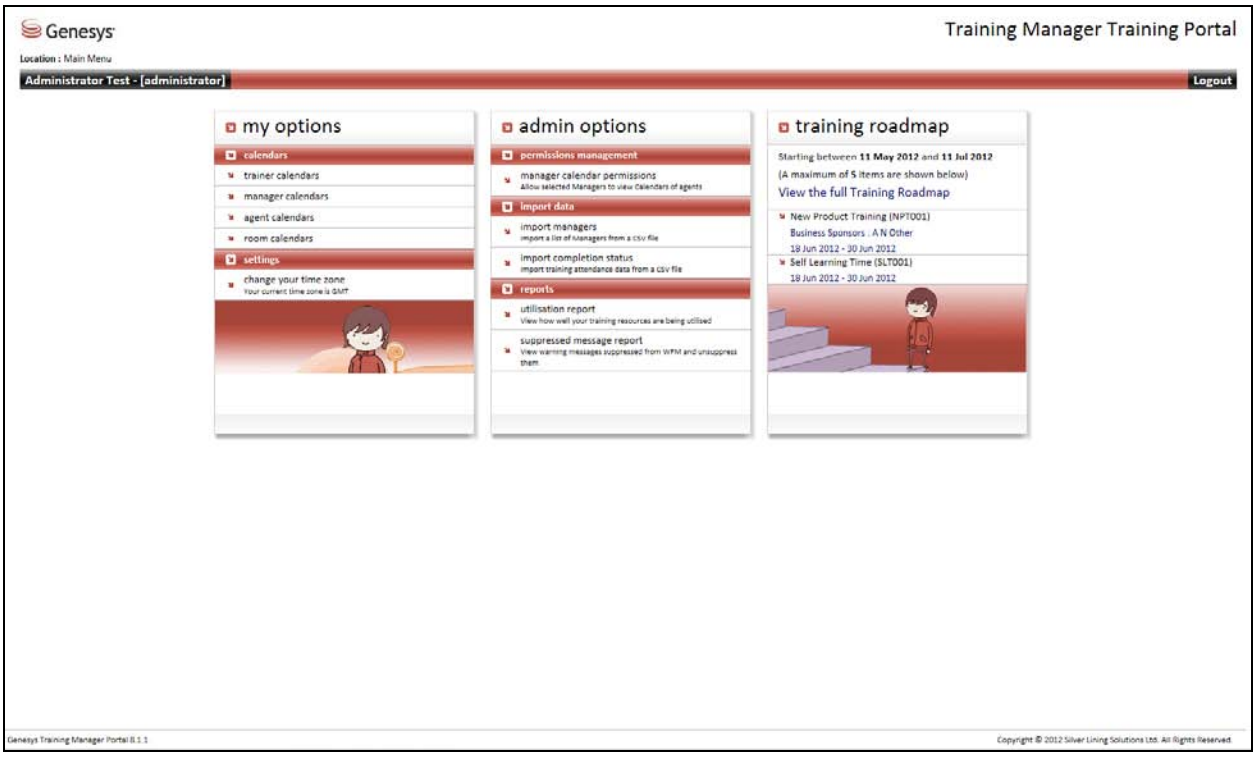
The option to change the time zone in the future is available on the home page under settings.



The home page is separated into three sections, `my options` in the left pane, `admin options` in the middle, 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.



The administrator has full access to the portal and can view the following:

- trainer calendars
- manager calendars
- agent calendars
- room calendars
- change your time zone

There is also additional administrator functionality:

- manager calendar permissions
- import manager details
- import completion status data
- utilization report
- suppressed message report

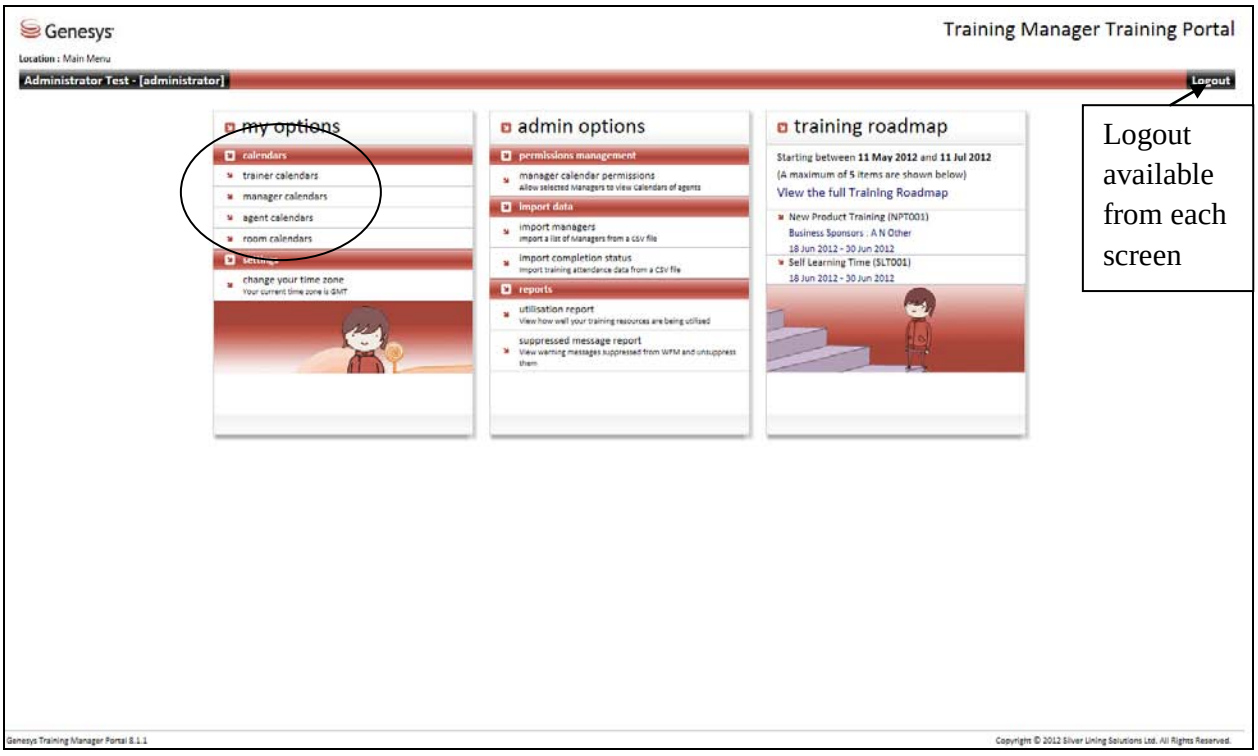
My Options

In the `my options` window, the administrator has access to the following options:

- Trainer Calendar
- Manager Calendars
- Agent Calendar
- Room Calendar
- Change your time zone

Please refer to the individual administration guides for information on the above functionality.

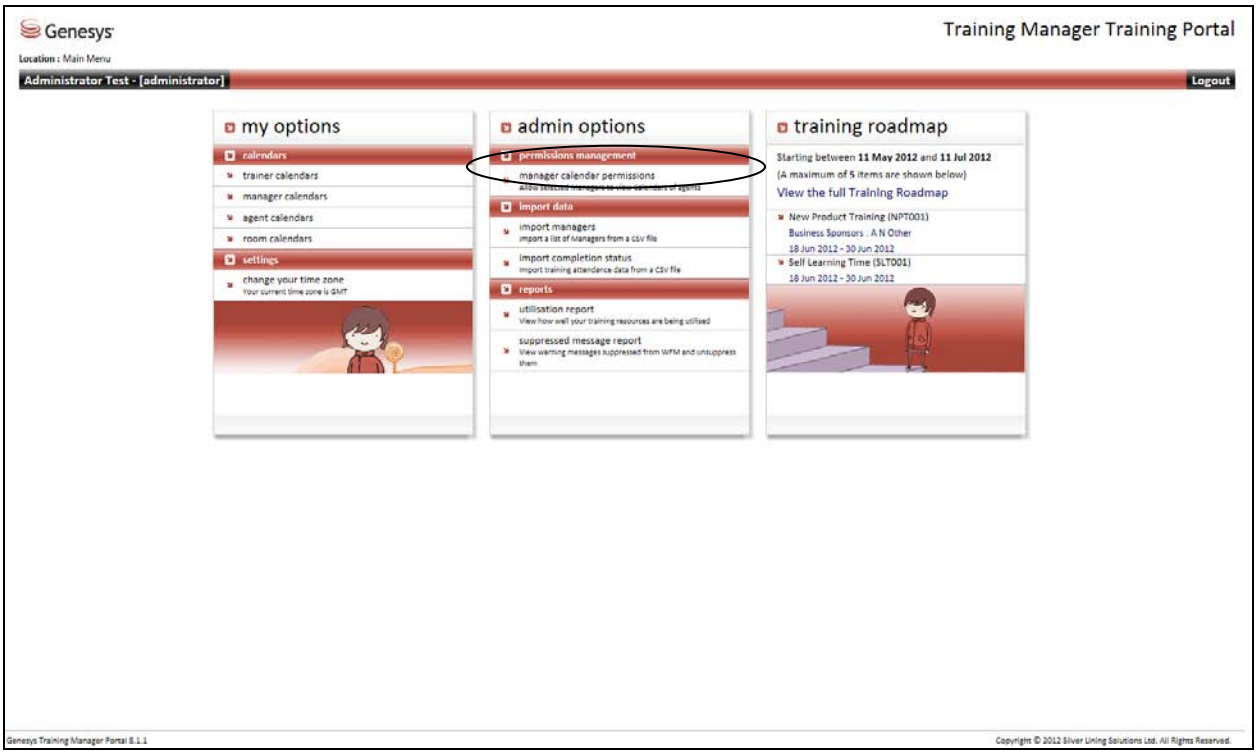
The option to logout is available in the top right hand corner of each screen.



Permissions Management

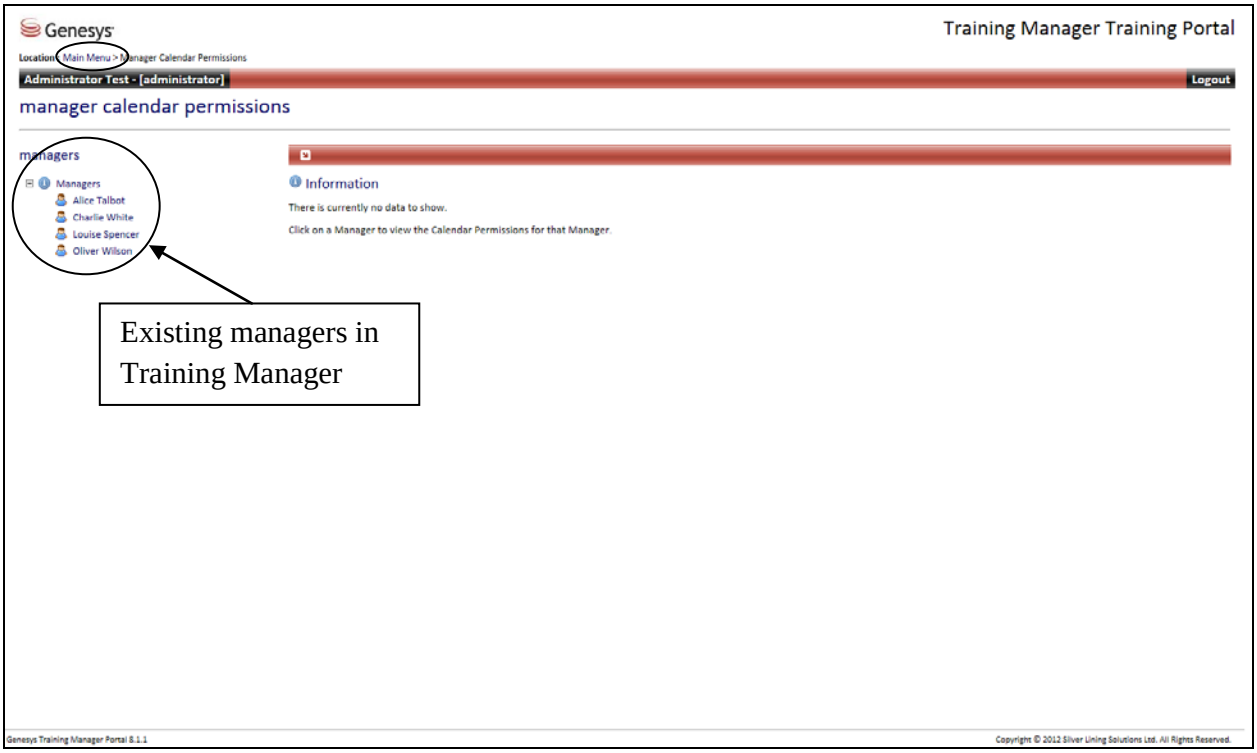
Where there is no integration into a HR system to maintain the manager/team relationship then the team structure has to be kept up to date using the permissions management process.

Select `manager calendar permissions` in the `admin options` window.

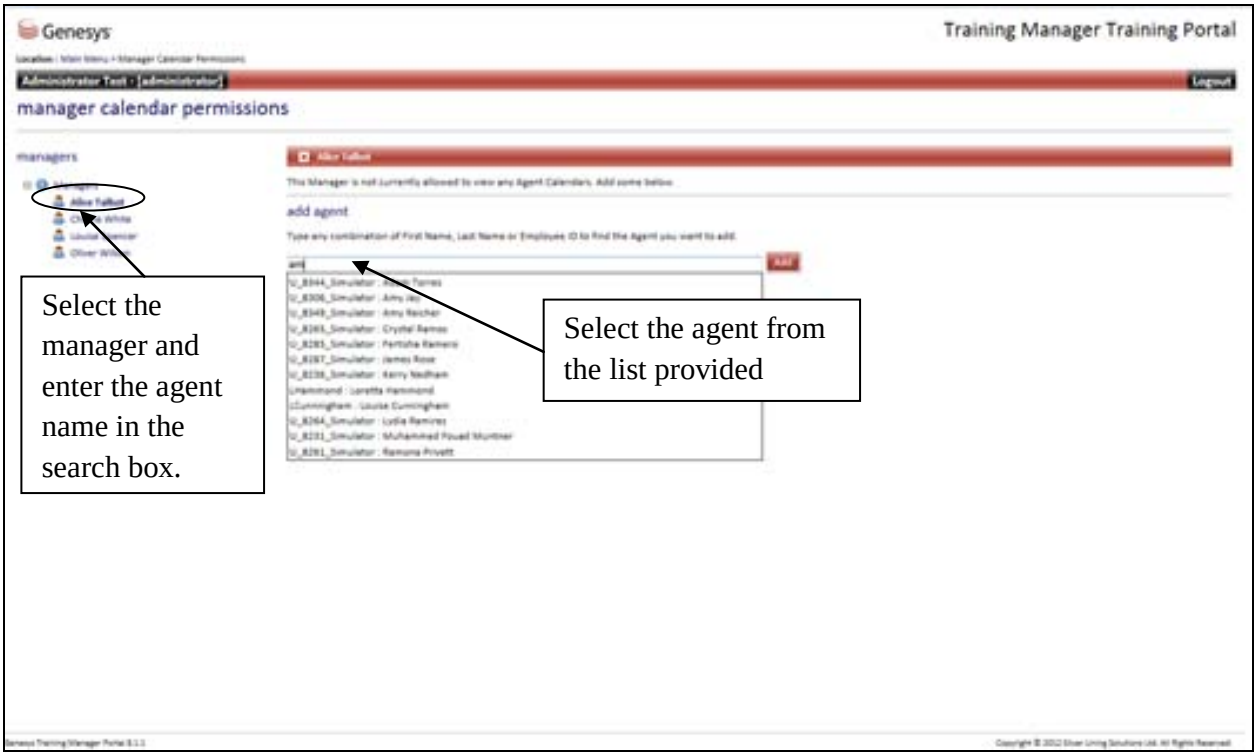


After selecting the `manager calendar permissions` option, a screen similar to the example below appears. Any managers already configured in Genesys Training Manger will appear at the left-hand side of the window.

To return to the home page, click `Main Menu` at any time.



To associate team members to a manager, select the manager from the left hand side and then in the `add agent` box enter the name of the team member. A filtered list of agents will appear based on the information entered to select the individual from.

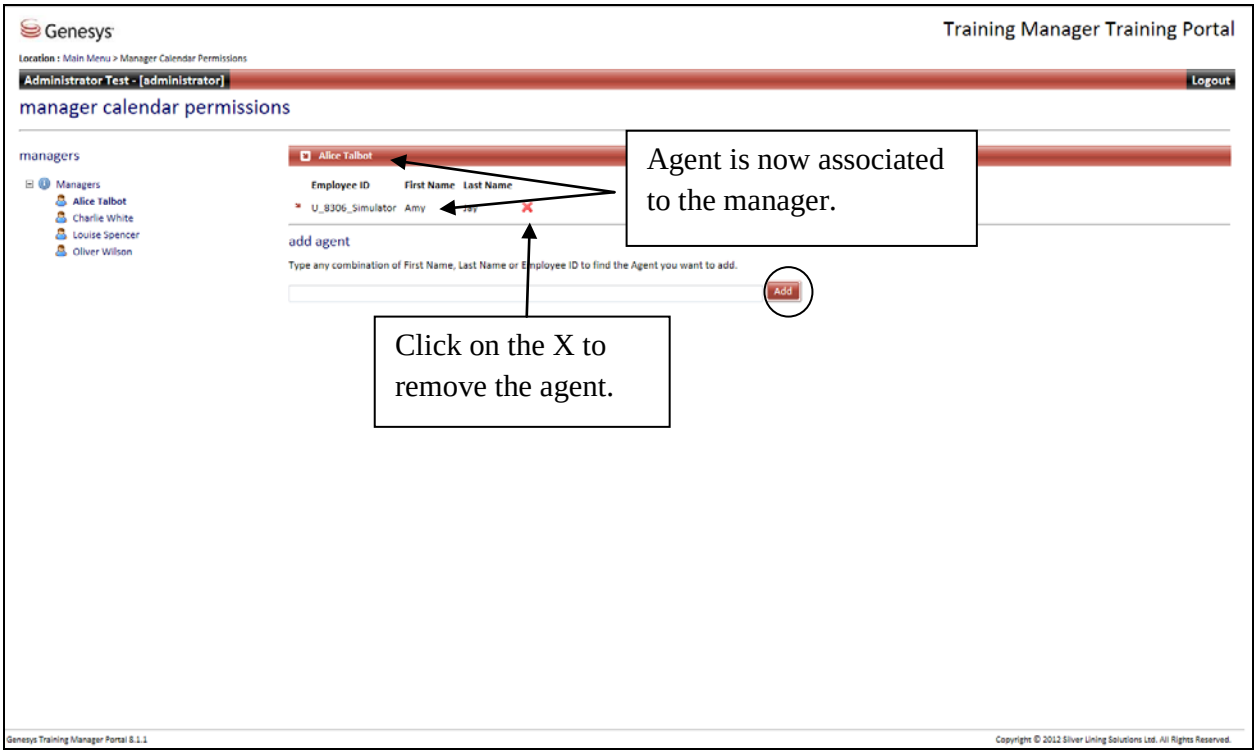


After identifying the required agent, click the `Add` button. This will add the agent to the manager list.

Continue associating any remaining members of the manager team until the list has been completed. It is possible to import the initial manager/team relationship (see the next admin option, `import manager for instructions`, however this can only be done once.

By associating agents to managers, the manager can view the agent training and meeting activities in their manager webportal. Without this association they will have no visibility of their agents.

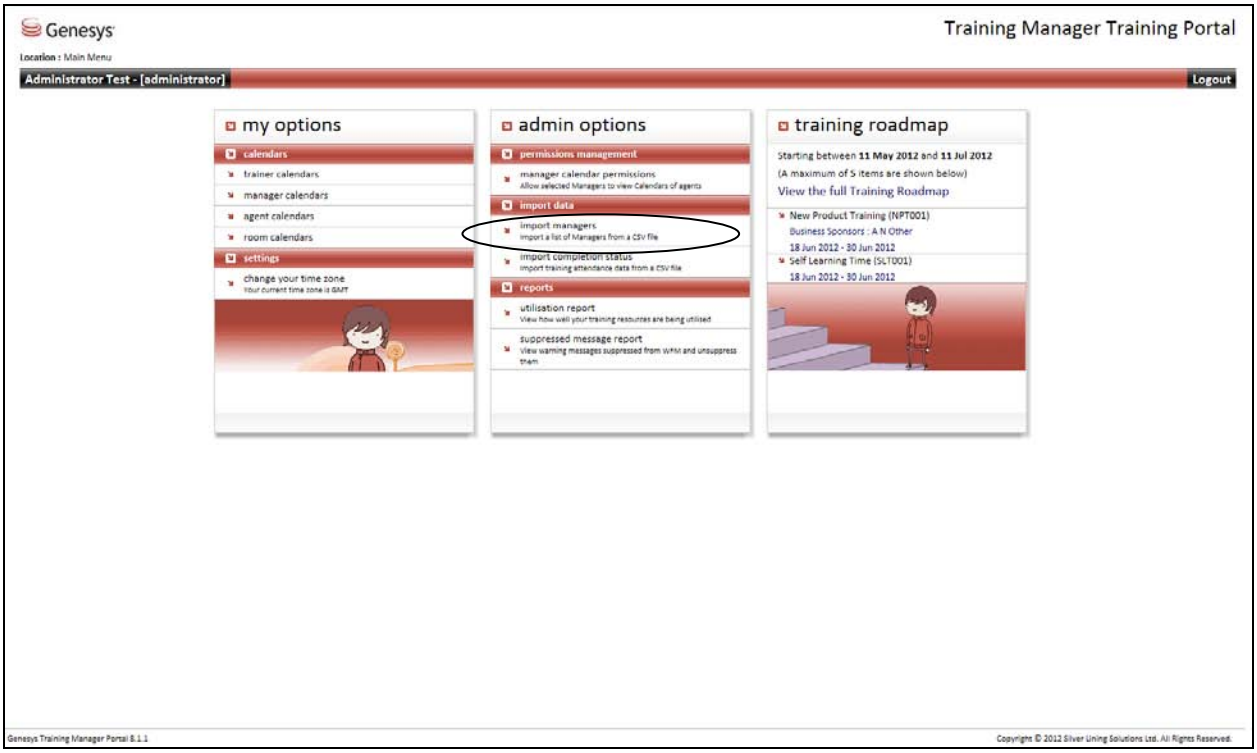
To remove an agent from the manager list, click on the `X`.



Import Manager Details

An initial import to create the manager / team relationship can be done through the `import manager details` option. This can only be done once. The relationship then needs to be managed manually in the `manage calendar permissions` admin option.

Select `import managers` to access the import process.



After selecting `import manager details`, the following screen appears allowing you to import csv files.

Select `Browse` to browse for the file that you want to import.

Note: The file *must* be in the format specified for the import to work correctly. Once the import has been completed, any anomalies will be reported.

An example of the csv file format is given on the next page.

As in the example below, the csv file containing the manager data should contain the following columns:

- ManagerID
- Manager's First Name
- Manager's Last Name
- Agent ID

Imports Managers.csv

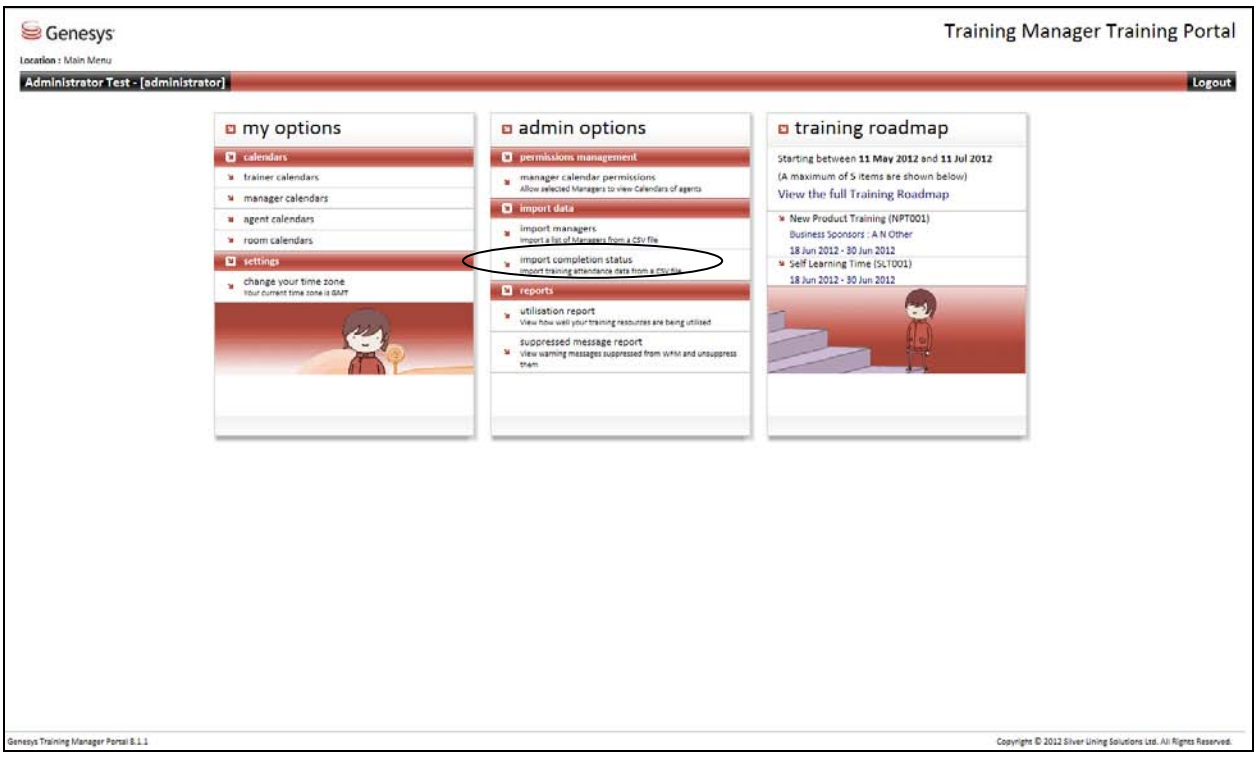
	A	B	C	D
1	ManagerID	FirstName	LastName	ReportID
2	423623	Amanda	Ballard	U_8306_Simulator
3	423623	Amanda	Ballard	U_7004_Simulator
4	423623	Amanda	Ballard	U_8224_Simulator
5	423623	Amanda	Ballard	U_8232_Simulator
6	423623	Amanda	Ballard	U_8227_Simulator
7	423623	Amanda	Ballard	U_7002_Simulator
8	423623	Amanda	Ballard	U_8329_Simulator
9	423623	Amanda	Ballard	U_8353_Simulator
10	423623	Amanda	Ballard	12345
11	423623	Amanda	Ballard	U_8322_Simulator
12	423623	Amanda	Ballard	HDunn
13	423623	Amanda	Ballard	U_6008_Simulator
14	128744	Bob	Hoskins	U_8330_Simulator
15	128744	Bob	Hoskins	U_8225_Simulator
16	128744	Bob	Hoskins	U_8223_Simulator
17	128744	Bob	Hoskins	KLewis
18	128744	Bob	Hoskins	U_7005_Simulator
19	128744	Bob	Hoskins	U_8332_Simulator
20	128744	Bob	Hoskins	U_8304_Simulator
21	128744	Bob	Hoskins	U_8307_Simulator
22	128744	Bob	Hoskins	U_8331_Simulator
23	128744	Bob	Hoskins	Terry
24	128744	Bob	Hoskins	U_8292_Simulator
25	128744	Bob	Hoskins	U_6007_Simulator
26	482931	Christine	Dixon	U_6006_Simulator
27	482931	Christine	Dixon	U_7001_Simulator
28	482931	Christine	Dixon	U_8326_Simulator

This will create the initial manager/team relationship list.

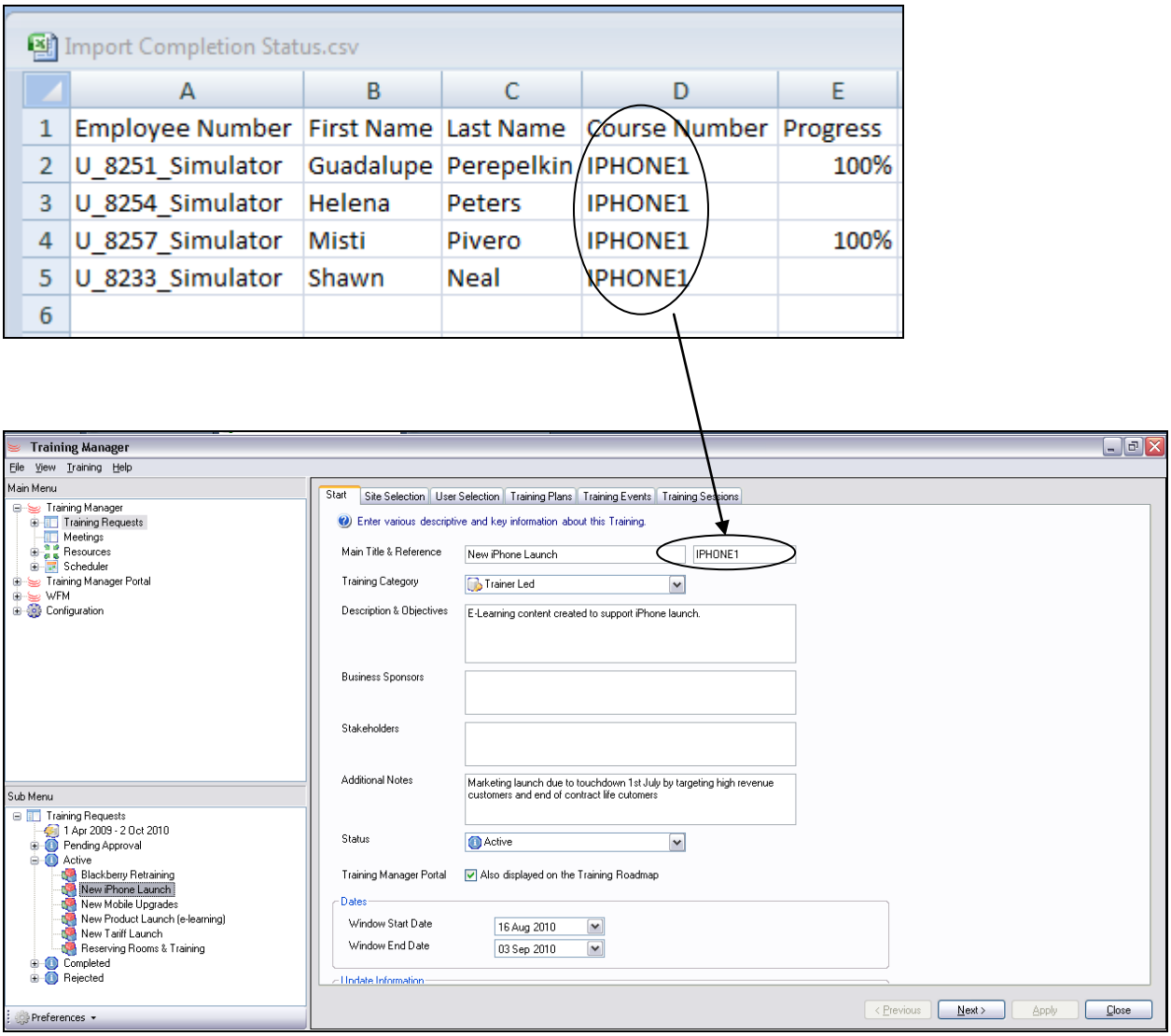
Import Completion Status Data

This process is used for updating the completion status for scheduled e-learning. If there is direct integration then the completion will be tracked automatically, however if there is no integration the attendance can be managed manually or by using this import completion process using a csv file.

Click on `import completion status` to access the import process.

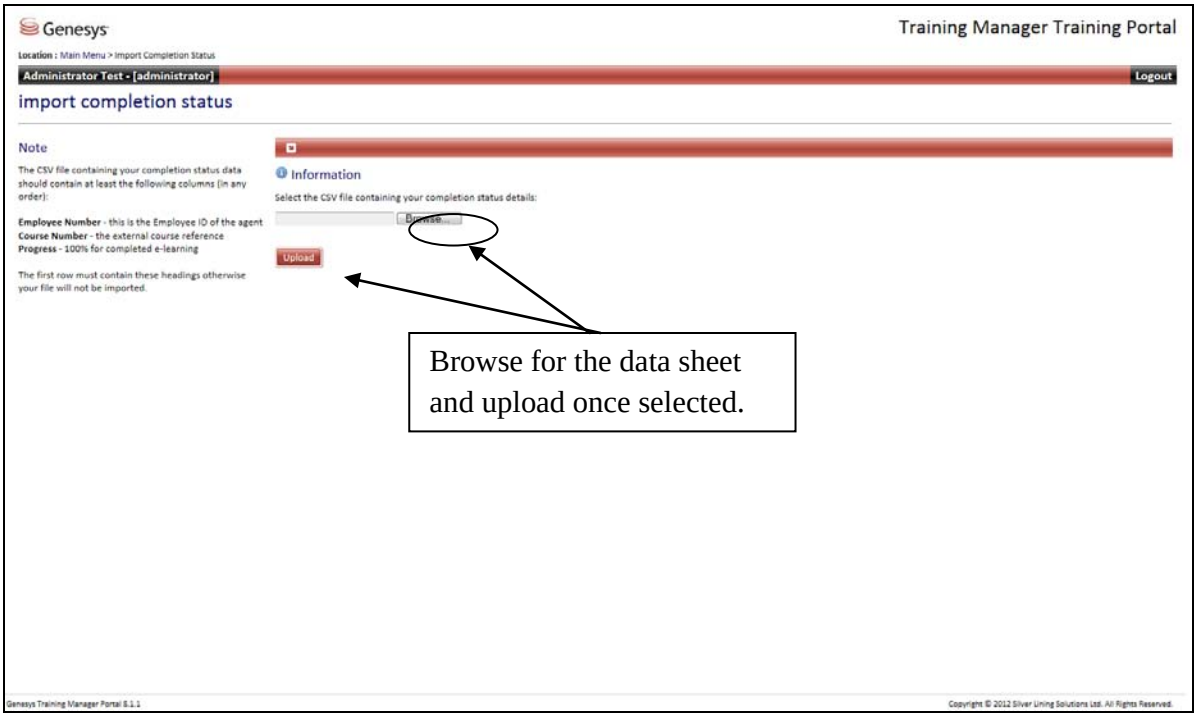


Below is an example of a csv file which has been exported from an LMS. The Course Number must match the Course Code in the Training Manager Training Request for this to work correctly.

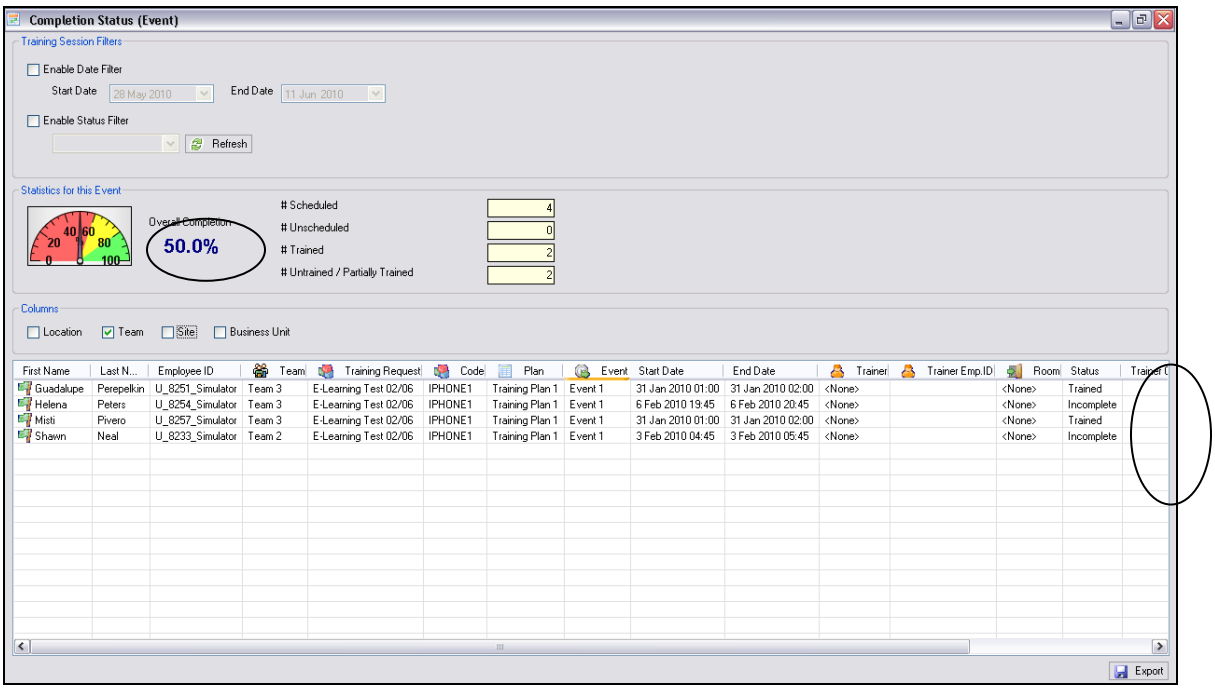


Select the `Browse` option to browse for the correct file to import. The data must be in the correct format for the import to work successfully.

Select `Upload` to upload the data.



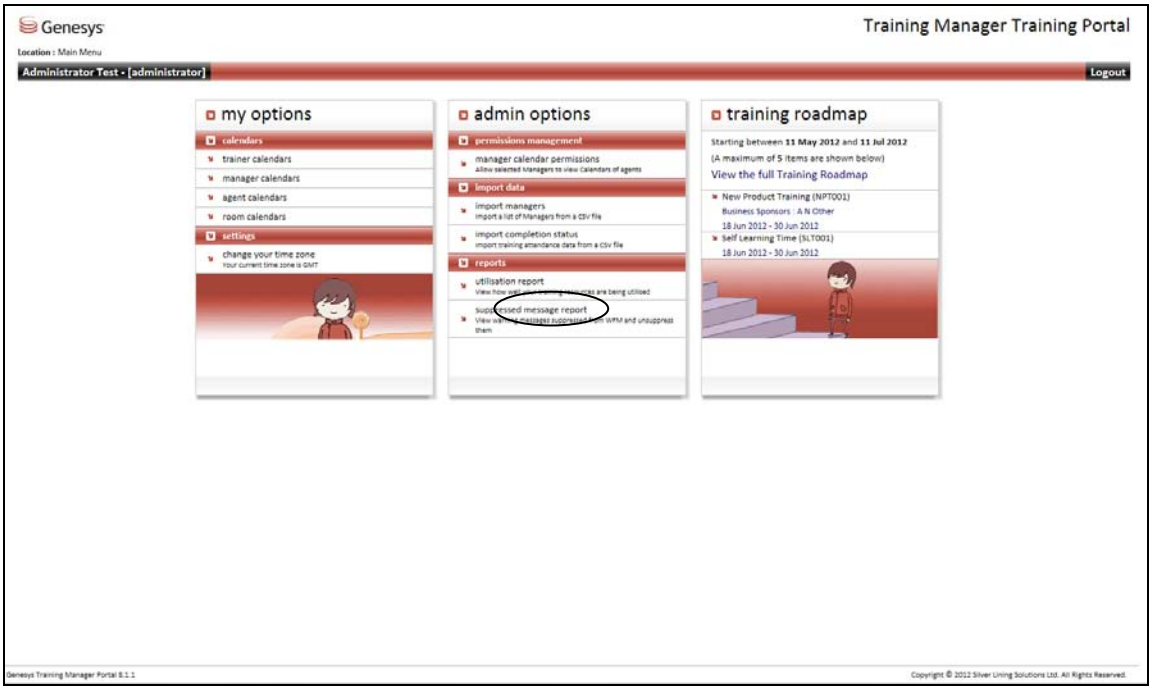
As in the example below, Training Manager is then automatically updated with the completion information from the imported report.



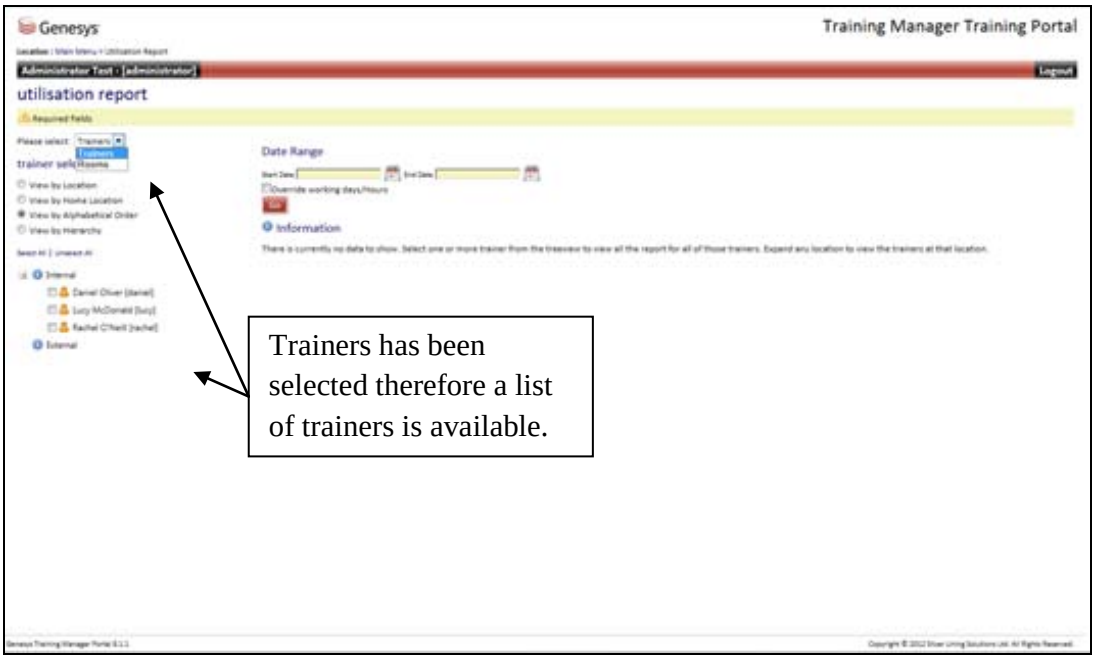
Utilisation Report

The utilization report is for Trainer and Room utilization.

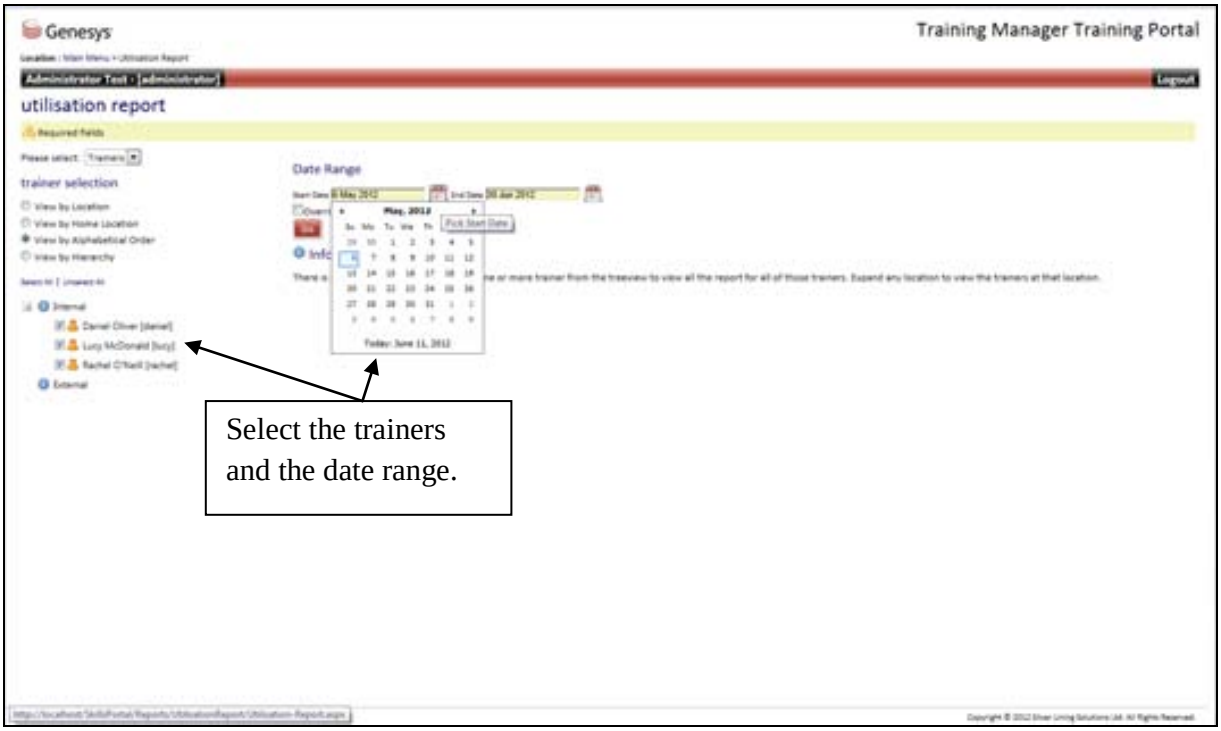
Click on `utilization report`.



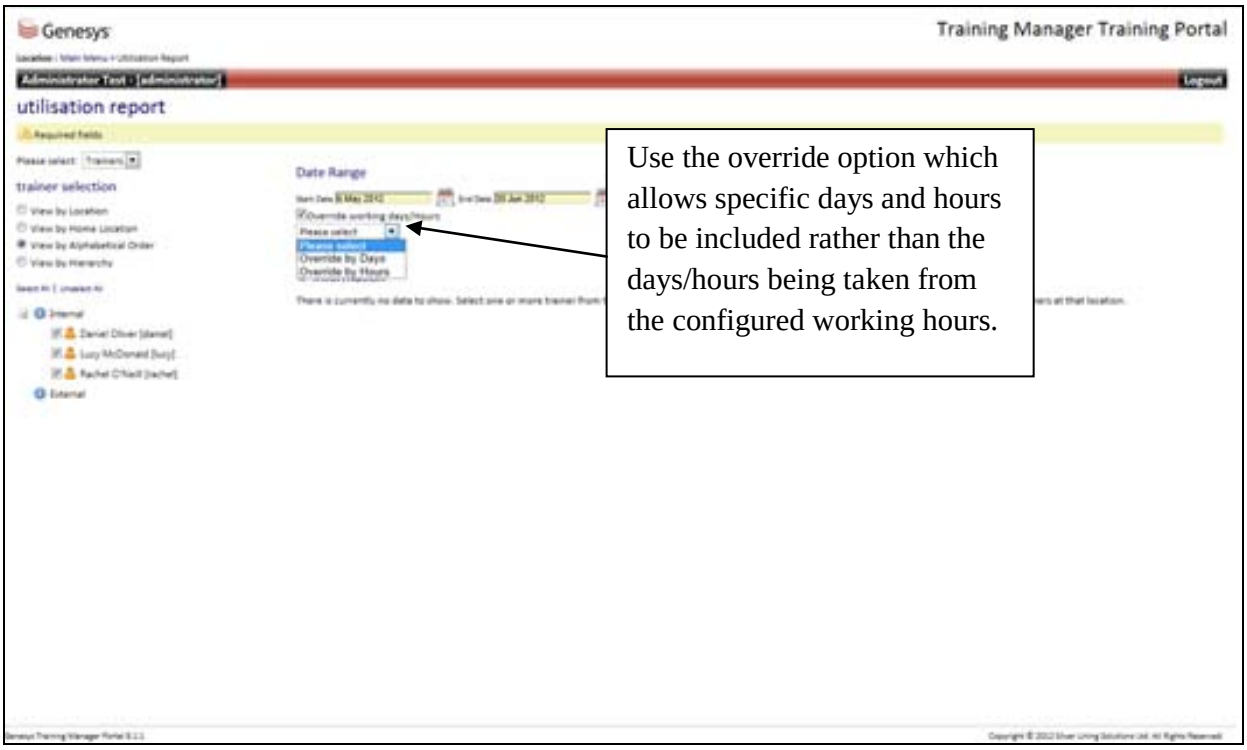
There are two options available, either select `Trainers` or `Rooms` from the drop down box. In this example, `Trainers` has been selected and therefore a list of trainers is available at the left hand side to select from and to report against.



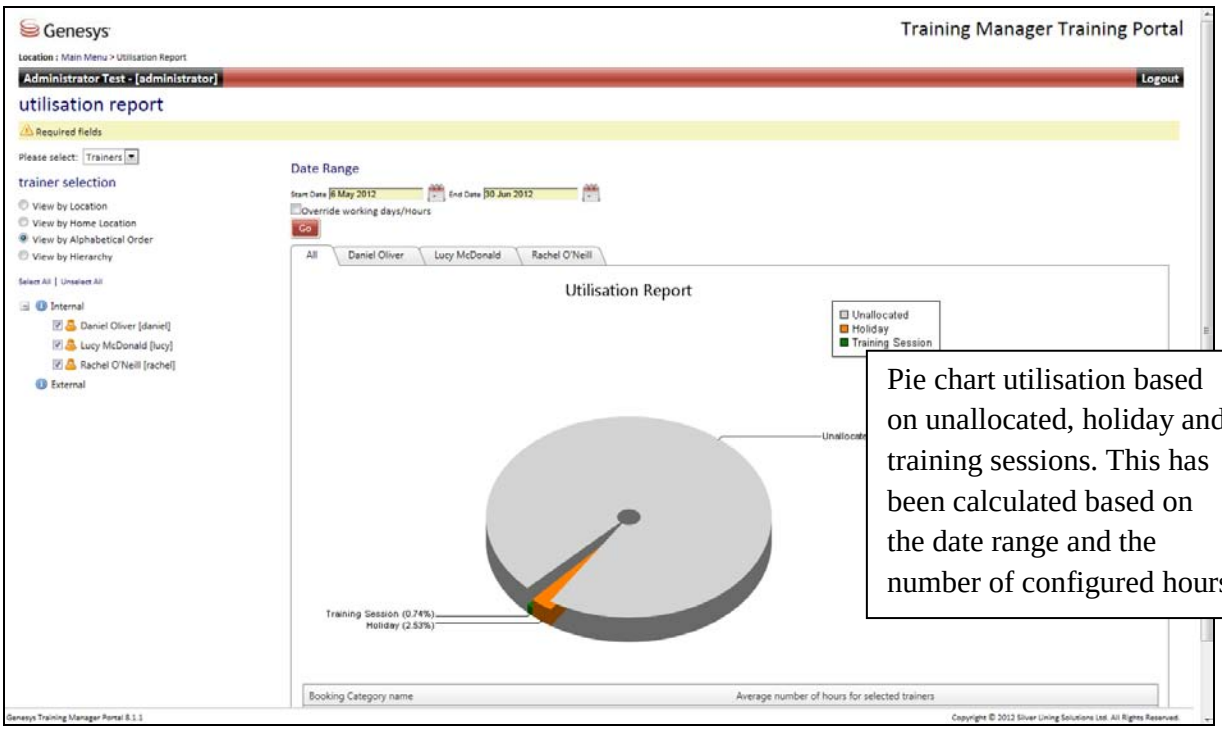
After selecting one or more trainers (in this example all of the trainers have been selected), choose a date range as required.



There is also an option to override the working days / hours by selecting `Override days/Hours`.



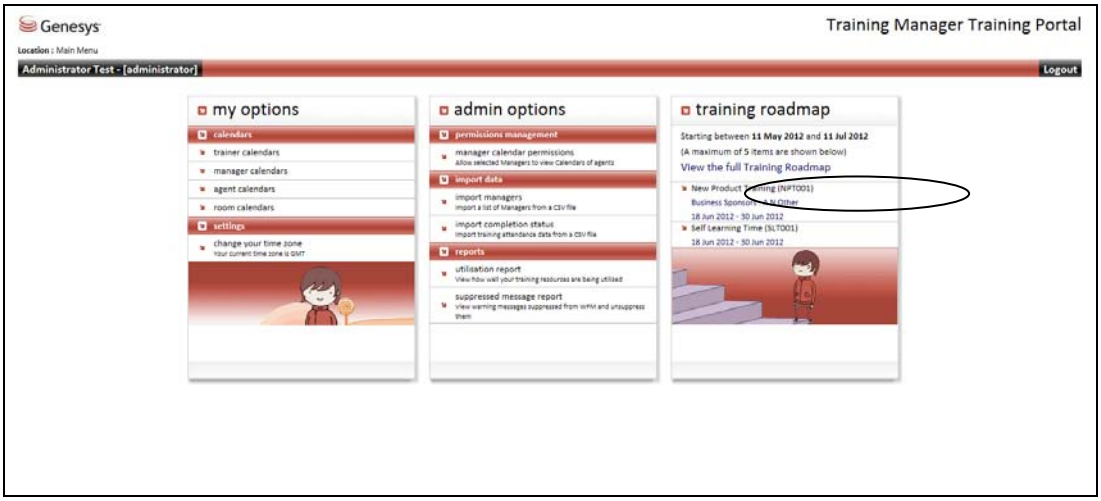
In the example below, the override option has not been selected. The pie chart presents an overall view or individual utilization views by trainer (or Room). Select each individual trainer if required.



Training Roadmap

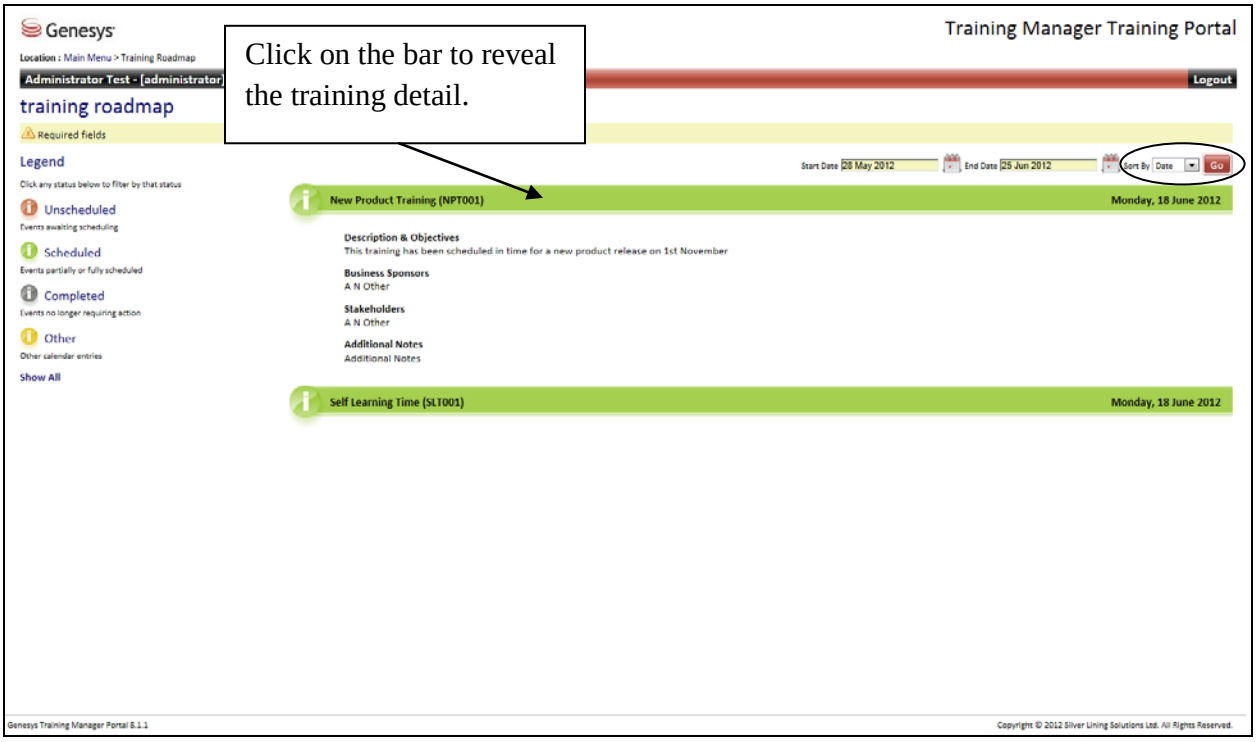
The latest scheduled training activity will be displayed in the training roadmap in the right pane of the home page, as shown in the following example.

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 legend 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.