



Genesys Training Manager 8.1.1

Web Portal Administrator Guide

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About Genesys

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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 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 <i>Genesys Migration Guide</i> for more information. Do <i>not</i> use this value for this option. <i>A customary and usual practice</i> 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.	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

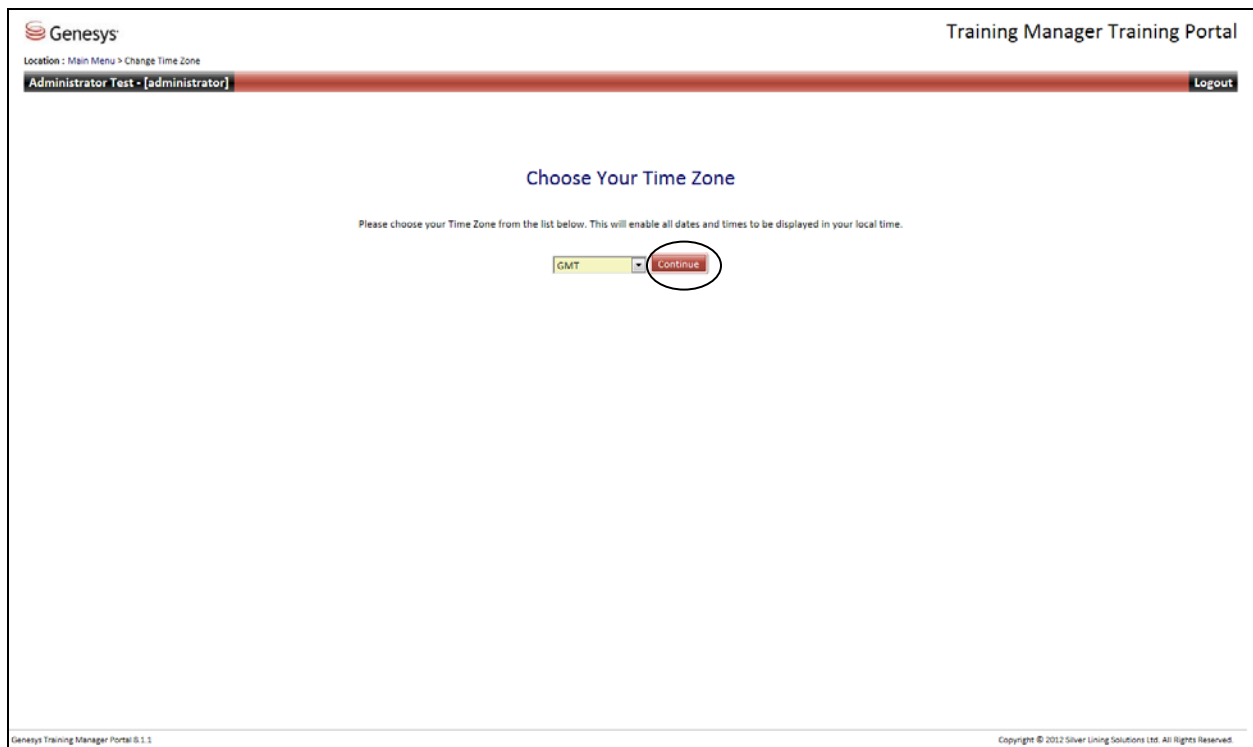
The Administrator

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.

A screenshot of the Genesys Training Manager Portal login page. The page has a red header bar with the Genesys logo on the left and 'Genesys Training Manager Portal' on the right. Below the header, the text 'Location : Login' is visible. The main content area starts with a 'Welcome' message, followed by the instruction 'To login, enter your User Name and Password below'. A login form is centered, containing a 'User Name' field, a 'Password' field, and a 'Continue' button. Above the form, a message states 'These details are case-sensitive'. Below the form, there is a 'Trouble logging in?' section with a warning icon and text explaining that the site uses cookies and providing instructions on how to resolve login issues if cookies are not accepted. The footer of the page contains the text 'Genesys Training Manager Portal 5.1.1' on the left and 'Copyright © 2012 Silver lining Solutions Ltd. All Rights Reserved.' on the right.

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.

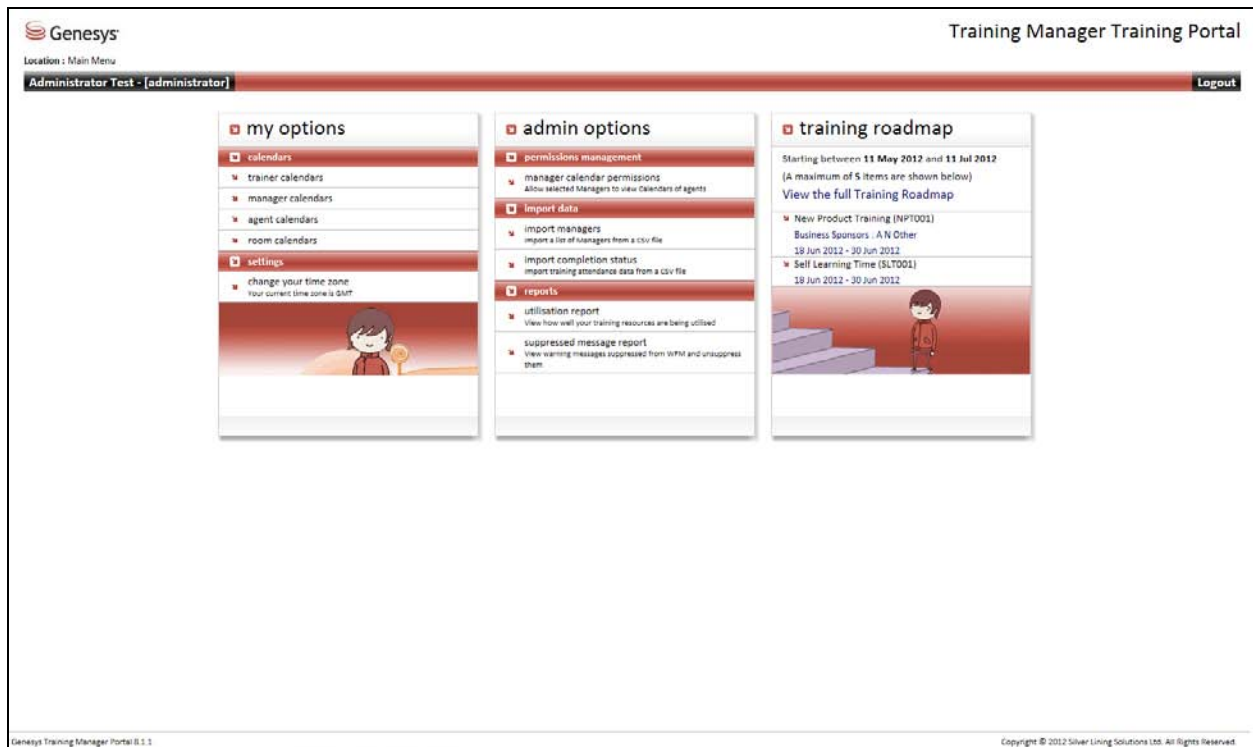


The screenshot displays the Genesys Training Manager Training Portal. At the top left is the Genesys logo. To its right, the text 'Training Manager Training Portal' is visible. Below the logo, the location path 'Location : Main Menu > Change Time Zone' is shown. A red horizontal bar contains the user information 'Administrator Test - [administrator]' on the left and a 'Logout' button on the right. The main content area is titled 'Choose Your Time Zone' in blue. Below this title, a message states: 'Please choose your Time Zone from the list below. This will enable all dates and times to be displayed in your local time.' A dropdown menu is shown with 'GMT' selected. To the right of the dropdown is a red button labeled 'Continue', which is circled in red. At the bottom left, the version 'Genesys Training Manager Portal 8.1.1' is displayed. At the bottom right, the copyright notice 'Copyright © 2012 Silver Lining Solutions Ltd. All Rights Reserved.' is present.

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

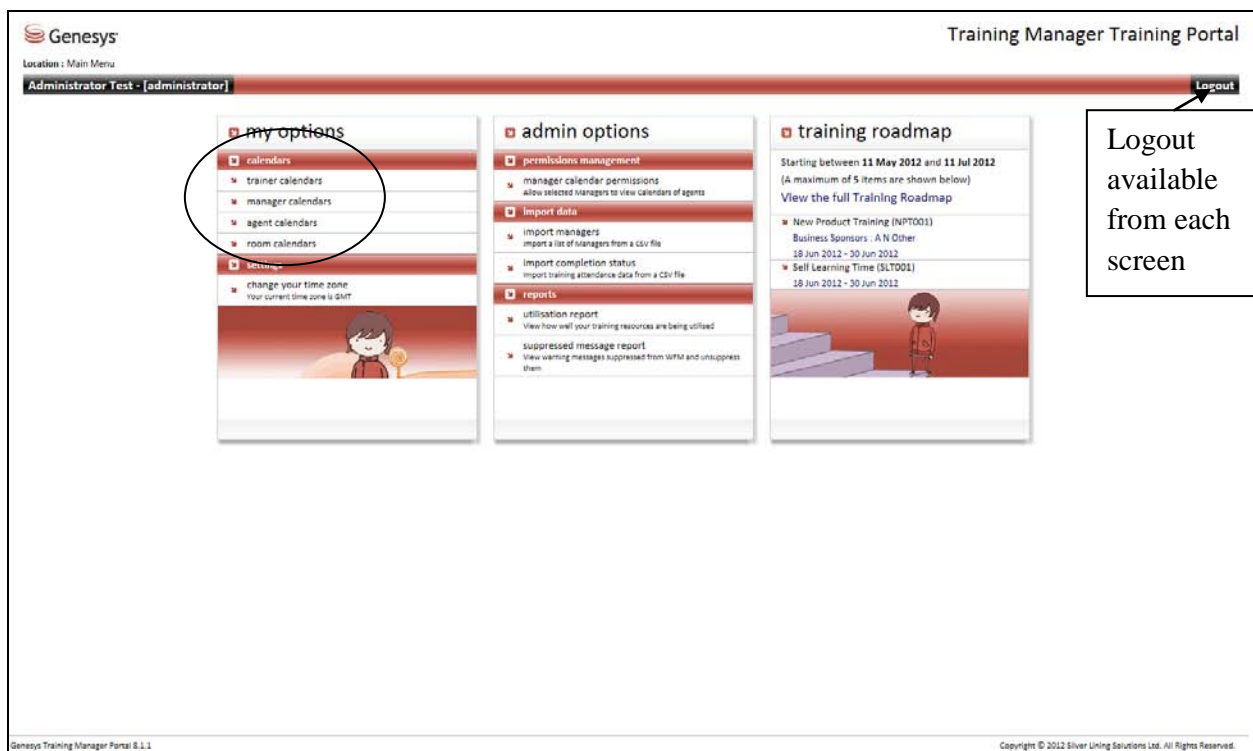
My Options

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.

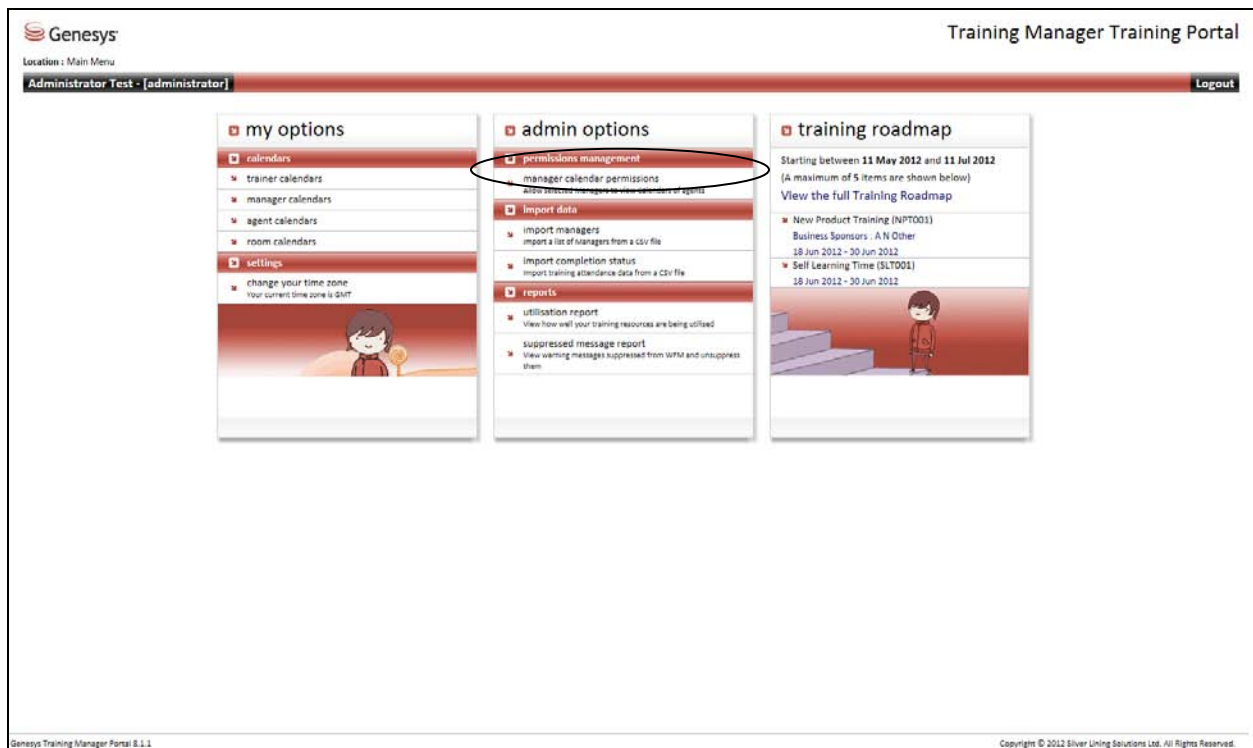
The option to logout is available in the top right hand corner of each screen.



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 Manager 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.

Genesys

Training Manager Training Portal

Location: Home > My > Manager Calendar Permissions

Administrator Test | administrator | Logout

manager calendar permissions

managers

- Alice Taylor
- Chris White
- David Brown
- Oliver Wilson

add agent

This Manager is not currently allowed to view any Agent Calendars. Add some below.

Type any combination of First Name, Last Name or Employee ID to find the Agent you want to add.

- u_8944_Simulator - John Bennett
- u_8306_Simulator - Amy Hall
- u_8349_Simulator - Amy Taylor
- u_8363_Simulator - Crystal Barnes
- u_8383_Simulator - Patricia Barnes
- u_8387_Simulator - James Rose
- u_8338_Simulator - Kerry Neillman
- u_8388_Simulator - Loretta Hammond
- u_8384_Simulator - Louise Cunningham
- u_8384_Simulator - Lydia Barnes
- u_8381_Simulator - Muhammad Fouad Munir
- u_8381_Simulator - Ramona Provelt

Select the manager and enter the agent name in the search box.

Select the agent from the list provided

Genesys Training Manager Portal 8.1.1

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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.

The screenshot displays the Genesys Training Manager Training Portal interface. At the top, the Genesys logo is on the left, and the title 'Training Manager Training Portal' is on the right. Below the logo, the location path 'Location : Main Menu > Manager Calendar Permissions' is shown. A red navigation bar contains the text 'Administrator Test - [administrator]' and a 'Logout' button. The main heading is 'manager calendar permissions'. On the left, a sidebar titled 'managers' lists several users: Alice Talbot, Charlie White, Louise Spencer, and Oliver Wilson. The main content area shows a table with columns 'Employee ID', 'First Name', and 'Last Name'. The first row is highlighted in red and shows 'Alice Talbot'. The second row shows 'U_8306_Simulator' as the Employee ID, 'Amy' as the First Name, and 'Tay' as the Last Name. A red 'X' icon is visible next to the last name 'Tay'. Below the table, there is an 'add agent' section with a text input field and an 'Add' button. A callout box with an arrow pointing to the 'X' icon contains the text 'Click on the X to remove the agent.' Another callout box with an arrow pointing to the first row of the table contains the text 'Agent is now associated to the manager.' The footer of the page includes 'Genesys Training Manager Portal 5.1.1' on the left and 'Copyright © 2012 Silver Linking Solutions Ltd. All Rights Reserved.' on the right.

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.

The screenshot displays the Genesys Training Manager Training Portal interface. The top navigation bar includes the Genesys logo, the text "Location : Main Menu", the user name "Administrator Test - [administrator]", and a "Logout" button. The main content area is divided into three columns:

- my options**: Contains links for "calendars" (trainer, manager, agent, room), "settings" (change your time zone), and a cartoon character.
- admin options**: Contains links for "permissions management" (manager calendar permissions), "import data" (import managers, import a list of Managers from a CSV file, import competition status, import training attendance data from a CSV file), and "reports" (utilisation report, suppressed message report). The "import managers" link is circled in red.
- training roadmap**: Displays training items starting between 11 May 2012 and 11 Jul 2012, including "New Product Training (NPT001)", "Business Sponsors : A N Other", and "Self Learning Time (SLT001)".

The footer contains the text "Genesys Training Manager Portal 8.1.1" and "Copyright © 2012 Silver Lining Solutions Ltd. All Rights Reserved."

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.

Genesys Training Manager Training Portal

Location : Main Menu > Import Managers

Administrator Test - [administrator] Logout

import managers

Note

The CSV file containing your manager data should contain 4 columns as specified below:

ManagerID,FirstName,LastName,ReportID

The first row must contain these headings otherwise your file will not be imported.

Information

Select the CSV file containing your manager details:

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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

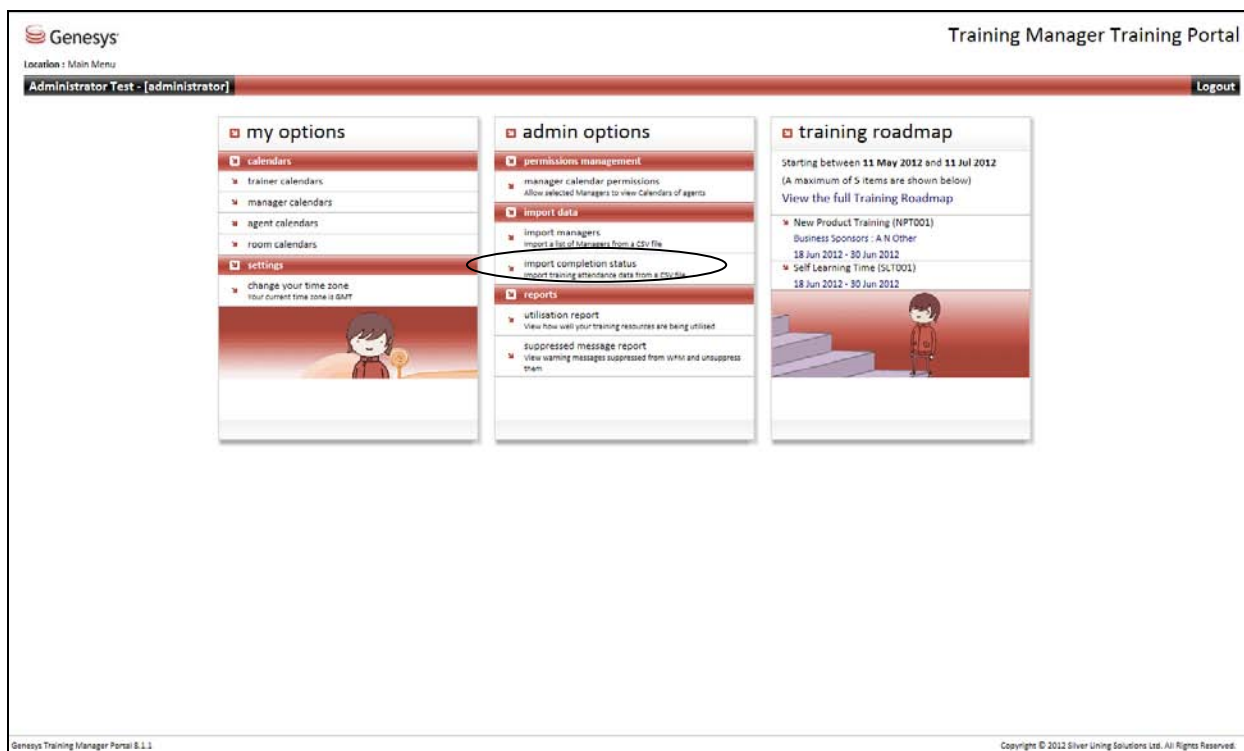
Imports Managers.csv				
	A	B	C	D
1	ManagerID	FirstName	LastName	ReportID
2	423623	Amanda	Ballard	U_8306_Simulator
3	423623	Amanda	Ballard	U_7004_Simulator
4	423623	Amanda	Ballard	U_8224_Simulator
5	423623	Amanda	Ballard	U_8232_Simulator
6	423623	Amanda	Ballard	U_8227_Simulator
7	423623	Amanda	Ballard	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.

Import Completion Status.csv					
	A	B	C	D	E
1	Employee Number	First Name	Last Name	Course Number	Progress
2	U_8251_Simulator	Guadalupe	Perepelkin	IPHONE1	100%
3	U_8254_Simulator	Helena	Peters	IPHONE1	
4	U_8257_Simulator	Misti	Pivero	IPHONE1	100%
5	U_8233_Simulator	Shawn	Neal	IPHONE1	
6					

Training Manager

File View Training Help

Main Menu

- Training Manager
 - Training Requests
 - Meetings
 - Resources
 - Scheduler
 - Training Manager Portal
 - WFM
 - Configuration

Sub Menu

- Training Requests
 - 1 Apr 2003 - 2 Oct 2010
 - Pending Approval
 - Active
 - Blackberry Retaining
 - New iPhone Launch
 - New Mobile Upgrades
 - New Product Launch (e-learning)
 - New Tariff Launch
 - Reserving Rooms & Training
 - Completed
 - Rejected

Preferences

Start Site Selection User Selection Training Plans Training Events Training Sessions

Enter various descriptive and key information about this Training.

Main Title & Reference: New iPhone Launch IPHONE1

Training Category: Trainer Led

Description & Objectives: E-Learning content created to support iPhone launch.

Business Sponsors:

Stakeholders:

Additional Notes: Marketing launch due to touchdown 1st July by targeting high revenue customers and end of contract life customers

Status: Active

Training Manager Portal: ☒ Also displayed on the Training Roadmap

Dates

Window Start Date: 16 Aug 2010

Window End Date: 03 Sep 2010

< Previous Next > Apply Close

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 Up Load to upload the data.

Genesys Training Manager Training Portal

Location : Main Menu > Import Completion Status

Administrator Test - [administrator] [Logout](#)

import completion status

Note

The CSV file containing your completion status data should contain at least the following columns (in any order):

Employee Number - this is the Employee ID of the agent
Course Number - the external course reference
Progress - 100% for completed e-learning

The first row must contain these headings otherwise your file will not be imported.

Information

Select the CSV file containing your completion status details:

Browse for the data sheet and upload once selected.

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

Completion Status (Event)

Training Session Filters

☐ Enable Date Filter
 Start Date: 28 May 2010 End Date: 11 Jun 2010

☐ Enable Status Filter

Statistics for this Event

Overall Completion: **50.0%**

# Scheduled	4
# Unscheduled	0
# Trained	2
# Untrained / Partially Trained	2

Columns

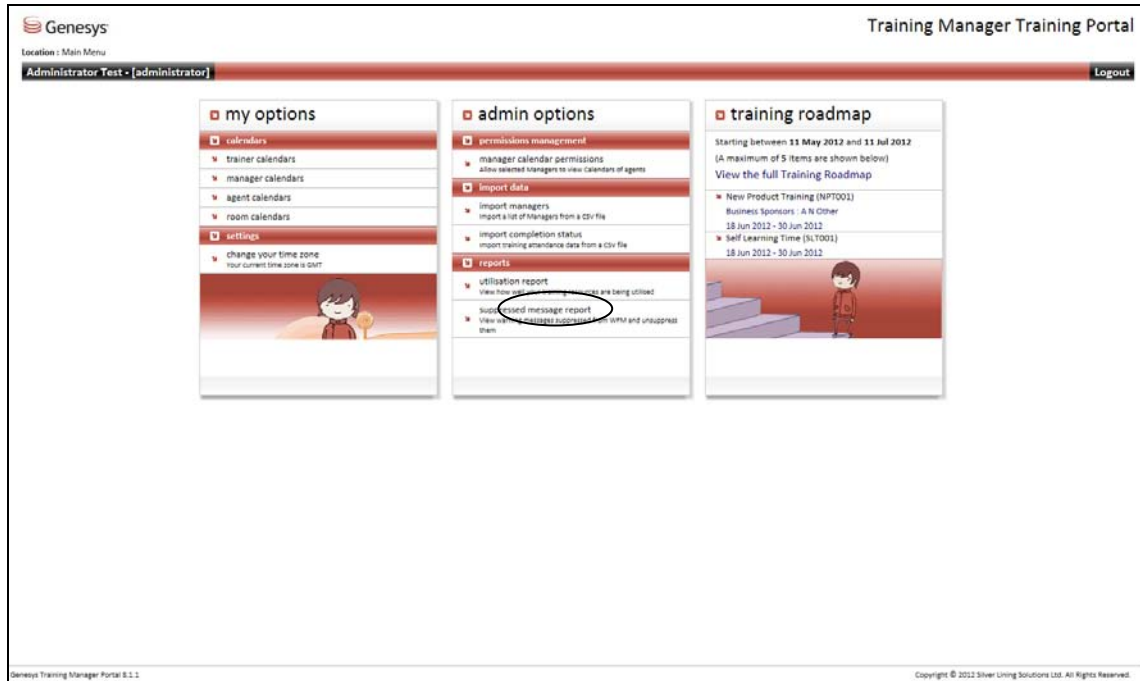
☐ Location ☒ Team ☐ Site ☐ Business Unit

First Name	Last N...	Employee ID	Team	Training Request	Code	Plan	Event	Start Date	End Date	Trainer	Trainer Emp.ID	Room	Status	Trainer U
Guadalupe	Perepelkin	U_8251_Simulator	Team 3	E-Learning Test 02/06	IPHONE1	Training Plan 1	Event 1	31 Jan 2010 01:00	31 Jan 2010 02:00	<None>	<None>	<None>	Trained	
Helena	Peters	U_8254_Simulator	Team 3	E-Learning Test 02/06	IPHONE1	Training Plan 1	Event 1	6 Feb 2010 19:45	6 Feb 2010 20:45	<None>	<None>	<None>	Incomplete	
Misti	Pivero	U_8257_Simulator	Team 3	E-Learning Test 02/06	IPHONE1	Training Plan 1	Event 1	31 Jan 2010 01:00	31 Jan 2010 02:00	<None>	<None>	<None>	Trained	
Shawn	Neal	U_8233_Simulator	Team 2	E-Learning Test 02/06	IPHONE1	Training Plan 1	Event 1	3 Feb 2010 04:45	3 Feb 2010 05:45	<None>	<None>	<None>	Incomplete	

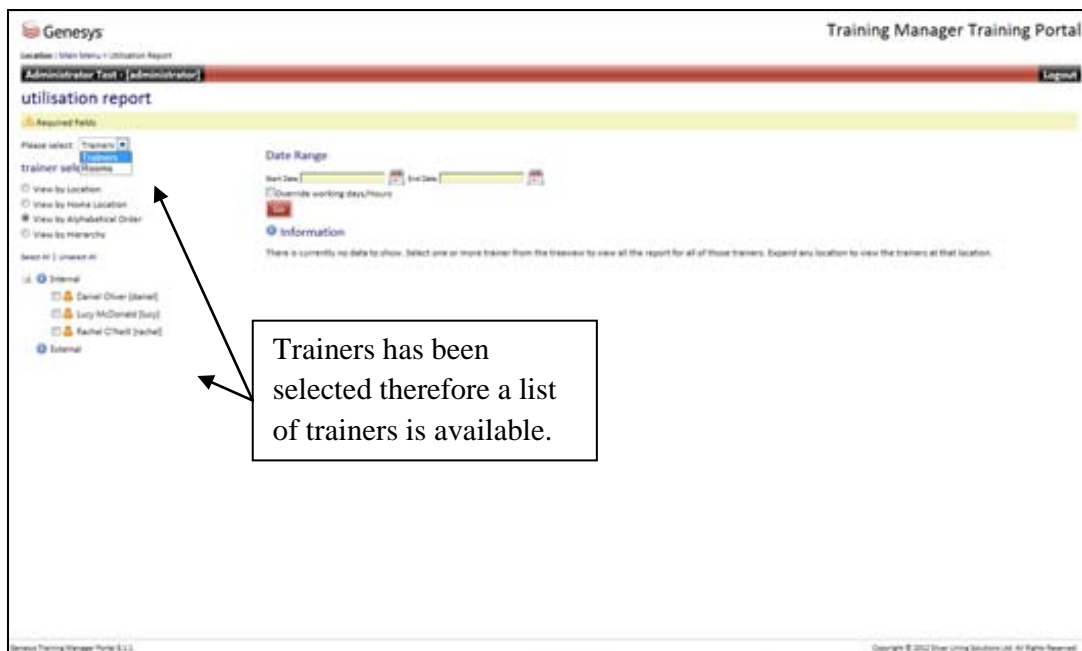
Utilisation Report

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.

Genesys Training Manager Training Portal

Administrator Test | administrator | Logout

utilisation report

Required Fields

Please select: Trainers

trainer selection

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

Select All | Unselect All

- ☒ Daniel Oliver (Internal)
- ☒ Lucy McDonald (Jury)
- ☒ Rachel O'Hall (Jury)
- ☐ External

Date Range

Start Date: May 2012 End Date: Jun 2012

May 2012

There is currently no data to show. Select one or more trainers from the list to view all the report for all of those trainers. Expand any location to view the trainers at that location.

Select the trainers and the date range.

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

Genesys Training Manager Training Portal

Administrator Test | administrator | Logout

utilisation report

Required Fields

Please select: Trainers

trainer selection

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

Select All | Unselect All

- ☒ Daniel Oliver (Internal)
- ☒ Lucy McDonald (Jury)
- ☒ Rachel O'Hall (Jury)
- ☐ External

Date Range

Start Date: May 2012 End Date: Jun 2012

☒ Override working days/Hours

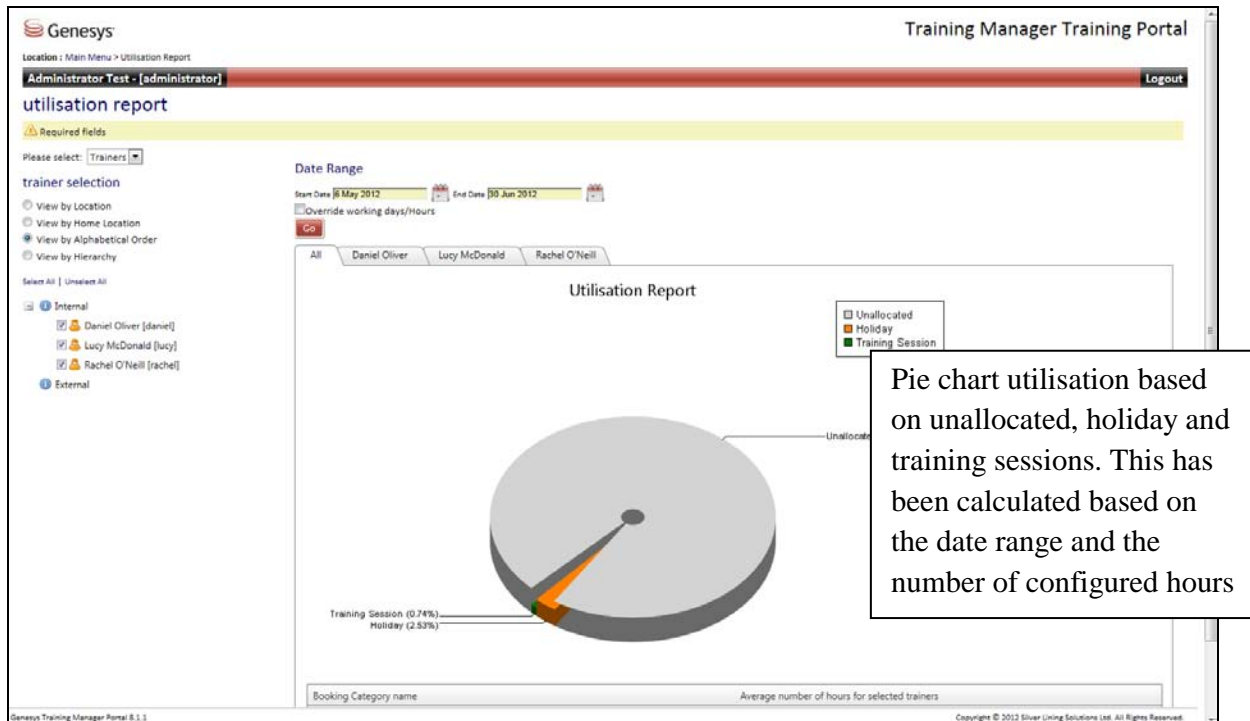
Please select: Please select

- ☐ Override by Days
- ☐ Override by Hours

There is currently no data to show. Select one or more trainers from the list to view all the report for all of those trainers. Expand any location to view the trainers at that location.

Use the override option which allows specific days and hours to be included rather than the days/hours being taken from the configured working hours.

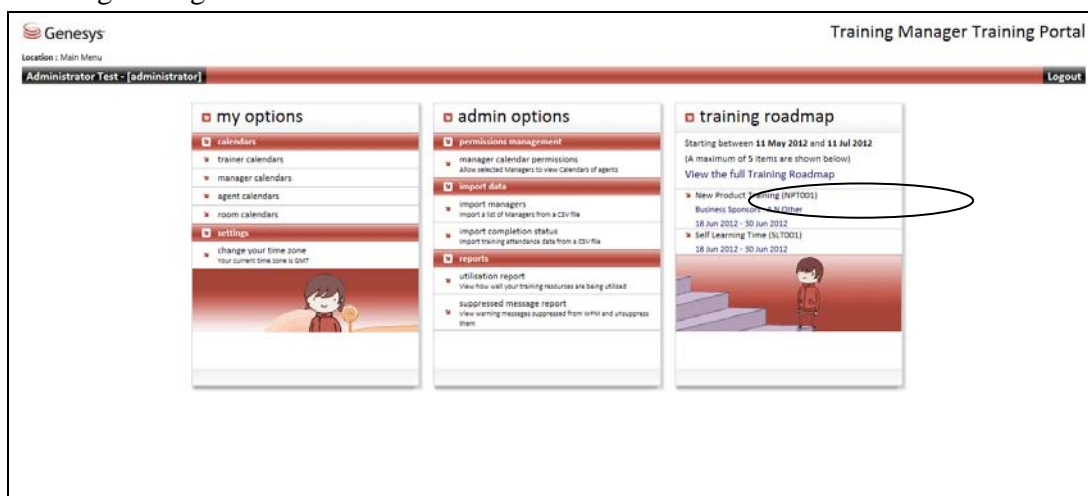
In the example below, the override option has not been selected. The pie chart presents an overall view or individual utilization views by trainer (or Room). Select each individual trainer if required.



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.

The screenshot displays the Genesys Training Manager Training Portal. The top navigation bar includes the Genesys logo, the location path "Location : Main Menu > Training Roadmap", the user name "Administrator Test - [administrator]", and a "Logout" button. The main heading is "training roadmap". Below this is a "Required fields" section and a "Legend" section. The legend lists four status categories: "Unscheduled" (Events awaiting scheduling), "Scheduled" (Events partially or fully scheduled), "Completed" (Events no longer requiring action), and "Other" (Other calendar entries). A "Show All" link is at the bottom of the legend. The main content area shows a list of training sessions. The first session, "New Product Training (NPT001)", is highlighted in green and labeled "Monday, 18 June 2012". A callout box with the text "Click on the bar to reveal the training detail." points to this session bar. Below the session bar, details are listed: "Description & Objectives" (This training has been scheduled in time for a new product release on 1st November), "Business Sponsors" (A N Other), "Stakeholders" (A N Other), and "Additional Notes" (Additional Notes). The second session, "Self Learning Time (SLT001)", is also highlighted in green and labeled "Monday, 18 June 2012". At the top right of the main content area, there are filters for "Start Date" (28 May 2012), "End Date" (25 Jun 2012), and a "Sort By / Date" dropdown menu with a "Go" button. The footer contains the text "Genesys Training Manager Portal 8.1.1" and "Copyright © 2012 Silver Lining Solutions Ltd. All Rights Reserved."