

Training Manager 8.5.648

Administrator Guide

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1 Preface

Welcome to the Training Manager for Genesys WFM *Administrator Guide*. This guide is designed to explain the application in user friendly terms and walk through how to administer the application from creating Locations, Trainers and Rooms to scheduling training into Genesys WFM.

Due to the integration into Genesys WFM, it is recommended that the Training Manager Administrators already have an understanding of Genesys WFM as this Admin Guide does not cover using Genesys WFM.

Note: for this version, the Skills Portal Users and Skills Assessor menu options have been removed, so please ignore this item in the screen shots.

2 About Training Manager for Genesys WFM

Training Manager enables companies to create, manage, and schedule multiple agent training activity, team meetings, and one-to-ones automatically in Genesys WFM. The training scheduling process can include rooms and trainers or any combination of agent, room, and training. For team meetings and one-to-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.

3 Intended Audience

This document is primarily intended for system administrators or other individuals who currently schedule using Genesys WFM.

4 Training Manager Administrator

The first time you run Training Manager you will be presented with a configuration screen as shown below. Enter the URL to the IIS virtual directory that contains the Training Manager services in the first field. The remaining fields can be left at their default value (if not using a proxy), or can be modified to suit your environment.

Web Services URL	http://plannerserver/plannerservices/
	Location of the Web Services e.g. http://your-server/Services/
Proxy Server URL (Optional)	
	Location of your proxy server used for both Web Services and WFM APIs
Web Service Connection Timeout	25000
	Time (in milliseconds) to wait when connecting to the Web Services.
WFM Connection Timeout	25000
	Time (in milliseconds) to wait when connecting to WFM.
Web Service Authentication	Use NTLM (Integrated Windows Authentication)
	Leaving this unticked will assume Anonymous Authentication
	<u> </u>

Figure 1: SkillsTraining Manager Configuration Screen

4.1 Logging In

Providing that the user has authority to access the application, the **Login** screen will appear as follows:

😸 Genesys Log	gin	×	
Genesys Login			
<u>U</u> ser Name:			
Password:			
OK Configurati	Cancel On Details <<]	
WFM Server:	WfmServer		
<u>H</u> ost Name:	demosrv.genesyslab.com	\sim	
Port :	5007	\sim	
HTTPS	Remember on successful logi	'n	

Figure 2: Login screen

Complete the details as required and select **OK**.

4.2 Logging Out

To log out of the application, click **File** and then **Exit** or click on the red X in the top right hand corner.

The Training Manager main menu will be displayed as in the example below.



Figure 3: Logging out

5 Training Manager Components Overview

Training Manager has several key components with a further component available for integration into the SkillsAssessor module:

- 1. **Training Requests** select this menu option to create a training request.
 - Completion Status / Reports
- 2. **Meetings** select this menu option to create and schedule any meetings or one-to-ones where the team manager is also required.

3. Resources

- Room Calendar all room activity will be visible here, from creating an individual manual room booking, to rooms booked as part of the optimized (or manual) scheduling process.
- Trainer Calendar as with room booking, all trainer activity will be visible here, from manual holidays and scheduled meetings, to training activity booked as part of the optimized (or manual) scheduling process. Trainers now have the ability to keep their calendar up-to-date directly through their web portal access.
- Manager Calendar the Manager Calendar has to be kept up-to-date with working hours and unavailable time for Training Manager to schedule team meetings. Managers keep their working hours and unavailability up-to-date-through their web portal access.
- 4. Skills Portal Users select this menu option to manage access to the web portal. Administrators are created here. Trainer managers, trainers, managers and agents are created automatically; however, trainer managers, trainers, and managers must be granted access to the web portal. Agents are granted access to their portal through the agent option 'Grant access to all from WFM...'
- 5. Configuration -
 - Training Categories the different categories used in training activity for example,
 Trainer Led.

- **Meeting Types** the different types of meetings associated with the specific meeting algorithm, for example, **One-to-One**, **Team Meeting**.
- Booking Categories distinguish the type of category in the web portal, for example, Holidays. They are also color coded for easy visibility.
- Selection & Exclusion record excluded users and / or excluded 'special dates' together with the reason e.g. long term absence.
- Resources locations, trainers, rooms and managers are created, configured, and managed here.
- 6. **SkillsPortal** select this menu option to manage authentication, branding, and visibility of training schedules in the web portal.

These components are covered in detail in the document.

6 Configuring Training Manager

Due to the integration into WFM, the following information will already be available to select through

Training Manager:

- Management Units.
- Agent Groups, Skills (including proficiency levels), and Activities.
- Agent WFM schedules.

6.1 Time Zone

When first accessing Training Manager check that the correct time zone has been selected as this will affect the scheduling activity.

Click on **Time Zone** in the bottom right hand corner and a separate window will be presented to use the drop down box to select your working time zone. This only needs to be done in the first instance or if your working time zone changes.



Figure 4: Setting your time zone

6.2 Locations

6.2.1 Creating Locations

Training Manager must be configured to identify the location that agents, trainers, managers and rooms are associated to. Training Manager needs this information to schedule training activity. The locations therefore must first be created in Training Manager.

To create a new location, expand **Configuration**, from the list under **Main Menu**. Expand **Resources** and then click on **Rooms & Locations**.





Expanding the **Internal** Sub Menu, displays a list of the internal sites. Expand the site to reveal any associated rooms.



Figure 6: Viewing additional options within the Internal sub menu

To create a new location, right-click **Internal** in the **Sub Menu**; additional options will appear.

Select **New Location**, and complete the details as required. If the location is a satellite site, select it from the **Parent Location** drop-down menu. Once the location has been created, rooms, trainers, managers and agent teams can be associated to it.

			X
Location			
Location Name	(New Location)	Complete the detail as required and associate the	
Parent Location Trime Zone	(Nore)	relevant time zone. Click on Apply once completed.	
		<u>8000</u>	Cancel
	Location Name Location Notes Parent Location	Location Name (New Locationo Location Notes Parent Location (None)	Location Name Image: Image



6.2.2 Deleting Locations

To delete a location, select it from the **Rooms** Sub Menu, and then right-click the location and select

Delete Location.

Note: A location can only be deleted if there are no activities associated with it.

🆇 SkillsPlanner - Version 3.4	× 8_
Ele View Iraining Help	
Main Menu	Location
🖌 🎋 SkillsPlanner	
Training Requests	Location Name Atlanta
I Meetings	Location Notes
b and a source Calendars	
🎋 SkillsPortal Users	
a 🎲 Configuration	
🐥 SkillsPlanner	Parent Location (Nono) V
Training Categories	10000
Meeting Types	Time Zone (UTC-08:00) US/Pacific
Booking Categories	
in Selection & Exclusion	Update Information
Resources	Created Thu, 09 Aug 2012 15:48 by IEXTotalView/master
Rooms & Locations	Last Updated Thu, 09 Aug 2012 17:24 by IEXTotat/Vew/master
Trainers	Law optised in the solvey contained and the solvey
Managers	
👫 SkilsPortal	
🤲 SkillsAssess	
Sub Menu	
a 📰 Rooms & Locations	
Viewing Active	
a 🕕 Internal	
🚊 (No Location)	
Atla	
p 📠 tila —	
D Lon 1 New Location	
Mat X Delete Location	
2	
🚮 🗹 View Active Rooms	
View Inactive Rooms	
Preferences +	

Figure 8: Deleting locations

6.3 Rooms

6.3.1 Creating Rooms

Rooms are created using the **Resources** option, similar to creating locations.

Select **New Room** from the **Rooms** Sub Menu; this will associate the new room with the location.

拳 SkillsPlanner - Version 3.4	<u>ای ا</u>	×
Elle Yew Iraining Help		
Main Menu	Location	
A ⁺ SkillsPlanner		
Training Requests	Location Name Manchester	
Meetings	Location Notes	
B and a second secon		
-M- SkillsPortal Users		
Onfiguration		
 -¥+ SkillsPlanner 	Parent Location (None>	
Training Categories		
Meeting Types	Time Zone (UTC +00.00) Europe/London	
Booking Categories		
A Selection & Exclusion	Update Information	
Besources	Created Thu, 09 Aug 2012 13:55 by IEXT of all view Amaster	
Rooms & Locations	Last Updated Thu, 09 Aug 2012 17:08 by IEXT staView/master	
Trainers		
Managers		
🔆 SkilsAssess		
Sub Menu		
a 🛄 Rooms & Locations		
Viewing Active		
a 🕕 Internal		
(No Location)		
Atlanta		
Blasgow		
London		
New Room		
Mew Location		
A Delete Location		
View Active Rooms		
View Inactive Rooms		
	Apply Quee	1
Preferences •	Apply Qose	1

Figure 9: Creating rooms

After selecting **New Room**, the **Room** screen appears on the right-hand side of the window.

Enter a relevant room name (including the location as part of the room name identifies where the training will take place) and any other necessary details.

Select the location of the room from the **Location** drop-down menu (the location name will be populated automatically if the room is created against the location).

Enter the room constraints. For example, the minimum and maximum number that the room can accommodate for training. Leave the minimum capacity of the room as 0 and manage the training group size as part of the scheduling process.

If the room becomes unavailable for scheduling then uncheck the **Active** box. The room will not appear as available when selecting rooms in which to schedule training.



Once the room has been configured it will appear against the location in the tree view.

Figure 10: Setting room options

6.3.2 Deleting Rooms

To delete a room, expand the location and select the room that you want to delete. Right-click the room and select **Delete Room** as in the example below.

The room will only be deleted if there has been no activity associated with it.

There is, however, the option to make the room inactive, which removes it from the list of available rooms. Uncheck the Active box; the room is now inactive.

Main Menu Room ¹ / ₂ Si SuProvet Floom Name ¹ / ₂ Si SuProvet	Elle Yew Iraining Help	
b Training Requests Room Name Adverse Room 1 Medingins Room Datales b 2 & StallPointal Users -> Confragration -> Location -> Location	Main Menu	Room
Membra 1 josei Membra 1 josei Bencha E Locations Active Rosens & Locations Update Information Tamers Update Information Consent Thur 09 Aug 2012 15 48 Vr. Staff-trait Leat Update Vr. Staff-trait Leat Update Vr. Staff-trait Leat Update Vr. Staff-trait Leat Update	Ye ² Stad-Parvee P	Room Name Adarda Room 1 Room Details
Sub Meru Sub Meru Sub Meru Sub Meru Su	Roms & Localons Venny Active Venny Active Nemry Active Addret Seate 1 Venn Active Rooms Marchester Room 2 Marchester Room 3	<u>6557</u>

Figure 11: Deleting rooms

6.4 Trainers

6.4.1 Trainers

Trainers are managed in SkillsAssessor. Preferably using OrgData.

Select **Configuration**, then select **Training Manager**, and then select **Resources**. Select **Trainers**; the tree view will appear in the **Sub Menu** below.

Expand the tree view to view any configured internal trainers.



Figure 12: Creating trainers

There are three ways to view the trainer structure; the Sub Menu hints will indicate which view is displayed. Right-click **Internal** in the **Sub Menu**; the following options will be available:

1. View by Location - this lists all of the locations in the Sub Menu; expanding the location reveals the associated trainers.



Figure 13: View trainers by location

2. **View by Hierarchy** –this lists the trainer manager and any associated trainers (creating the Trainers hierarchy will be covered later in the document).



Figure 14: View trainers by hierarchy



3. View by Alphabetical Order – lists all of the trainers in alphabetical order.

Figure 15: View trainers by alphabetical order

A new external trainer can be created by right-clicking a trainer category apart from Internal.

Ele View Iraining Help	
Main Menu	
⊿ ≫ SkillsPlanner	
Training Requests	
Meetings	
B and B a	
🎋 SkillsPortal Users	
🔺 🎡 Configuration	
🖌 🏁 SkillsPlanner	
Training Categories	
Meeting Types	
Booking Categories	
Selection & Exclusion	
A Resources	
Rooms & Locations Trainers	
Managers	
₩ SkillsPortal	
₩ SkilsAssess	
	•
	•
Sub Menu	silverlining solutions
Trainers	JIVGI
✓ Viewing Active by Alphabelical Order	solutions
	Contribute
New Traiper	
View by Location	
View by Hierarchy	
View by Alphabetica Urder	
View Active Trainers	
View Inactive Trainers	
	1



Select **New Trainer** (only for external Trainers); the **Trainer** screen will appear on the right-hand side of the window.

Trainer (External)					
First Name *					
Last Name *					
Employee ID *					
Trainer Details					
Active Skills					
Skill Code Skill Na	Skill Co	Train th	Course		

Figure 17: Creating a new trainer

Enter the details as required. If the trainer is external, an external reference can be included.

The option to mark the trainer as inactive is also available.

Information entered in **Working Hours** and **Locations** identifies when and where the trainer is available.

The **Skills** tab is used to associate specific skills with individual trainers.

6.4.2 Working Hours

This has to be updated in SkillsTraining Manager, the top part of the screen is not editable because Trainers are maintained in SkillsAssessor.

Training Manager needs the following information for the application to understand what hours the trainer can work.

Working Hours:

Start –the earliest time that the trainer can start work.

End –the latest time the trainer can finish work.

Lunch: – the earliest and latest times for lunch.

Earliest – the earliest time the trainer can have their lunch.

Latest – the latest time the trainer can finish their lunch.

This information allows the application to understand when the trainer can be scheduled and how flexible they are with their working hours.

Note: Training Manager supports the ability to select trainers for scheduling when their start time is midnight. Setting both Start and End working hour times to "00:00" indicates a non-working day so ensure that the End time is not set to "00:00" if you want the shift to start at midnight.

irst Narr	ie *	Joe	Joe			
ast Nan	ne *	DePlummer	DePlummer			
mployee	e ID *	232	232			
mail Ad	dress					
rainer D)etails					
lanager		<none></none>			\sim	
VFM ID		2C990604-1	D8B-F9AD-01	1D-914780590EBE		
ctive		\checkmark				
Wo	rking Hours	Working R		ations Skills		d D
	Working H Start	End	Lunch Farliest	latest		
Mon	09:00 🚖		12:00 			
		17:00 🚖	12.00	13:00 👘		
Tue	09:00 🜩	17:00 💠	12:00	13:00 🜩		
Tue Wed		Landard				
	09:00	17:00 🜲	12:00 😫	13:00		
Wed	09:00 \$	17:00 ‡	12:00 🗢	13:00 ÷		
Wed Thu	09:00 \$ 09:00 \$ 09:00 \$	17:00 ¢ 17:00 ¢ 17:00 ¢	12:00 ÷ 12:00 ÷	13:00 ¢ 13:00 ¢ 13:00 ¢		

Figure 18: Creating a new trainer: working hours

6.4.3 Working Rules

Maximum Hours Per Day – the maximum number of hours the trainer can work per day.

Maximum Hours Per Week – the maximum number of hours the trainer can work per week. This field is not restricted to whole hours.

Trainer Week Starts On – enables Training Manager to calculate the trainer's working hours against

their maximum hours per week.

Minimum Hours Between Working Days - the mandatory minimum rest time between shifts.

Minimum Required Lunch Break in the Working Day - the time entered here will ensure that

the trainer receives this minimum amount of time for their lunch break.

Total Minutes for all Breaks in the Working Day - the time entered here will ensure that the trainer receives this minimum amount of time for their total lunch breaks.

This information allows the application to understand when the trainer can be scheduled and how flexible they are with their working hours.

Working Hours Working Rules Locations	Skills	D
Maximum Hours Per Day	9 Hours	
Maximum Hours Per Week Trainer Week Starts On	40,00 + Hours	
Minimum Hours between Working Days	8 🖨 Hours	
Minimum required Lunch Break in the Working Day	60 - Minutes	
Total minutes for all Breaks in the Working Day	60 📥 Minutes	

Figure 19: Creating a new trainer: working rules

6.4.4 Trainer Locations

The information on this tab must be completed as part of configuring a new trainer.

It identifies the location(s) where the trainer can deliver training. More than one location can be selected.

When the **Location** tab is selected, a list of locations in the application appears. Select the relevant location and check the box to the left of the location name. Do the same for each location where the trainer can deliver training. The trainer's home location must be clearly identified, as Training Manager will always prioritize training to trainers at their home location.

To set a location as a home location, click the icon to the left of the location name and then right-click it to view the **Add Home Location** option. Select **Add Home Location**.

Working Hours Working Rules Locations Skills	<	D
Legend Home Location Right-click a Location to change Home status		
⊿ 🛄 Locations		
🔽 🚊 Central Time - America Chicago		
🔲 🚊 London		

Figure 20: Creating a new trainer: locations

Once Add Home Location has been selected, the location will have a yellow box around it.

The option to remove the current home location is available by right-clicking the location and selecting **Remove as Home Location**.

You now have the option to select a different home location for the trainer.

Working Hours Working Rules Locations Skills	
Legend Home Location Right-click a Location to change Home status	
🖬 🛄 Locations	
🔲 🛄 Atlanta	
Remove as Home Location	
🗹 🚊 'London	
🗹 🛄 Manchester	

Figure 21: Creating a new trainer: removing a home location

6.4.5 Deleting Trainers

The option to delete a trainer is only available for external trainers. Internal trainers are managed through SkillsAssessor.

Eile <u>V</u> iew <u>I</u> r-	aining <u>H</u> elp		
Main Menu			
-¥- Skillefotal Uses → ⊕ Configuration → ¥- SkillePlanner □ Trannp Calegories □ Mexing Types			
Selection & Exclusion Resources Resources Resources			
Trainers Trainer Skills Managee Skillboatel Skill			
	Active by Alphabetical Order		
⊿ ③ Internal ▲ An ▲ Ch ▲ Eli	New Traine Delete Traine Delete Traine Werr by Location View by likeacdly View Aphabatical Order View Machine Traines		
Preferences •			

Figure 22: Deleting trainers

6.5 Trainer Skills

Training Manager includes features for managing trainer skill information. Associating skills and skill levels with trainers allows training schedulers to identify the best trainer for training requests based on their skill data.

6.5.1 Managing skill information

To create new skills browse to the Configuration -> Skills Training Manager -> Resources -> Trainers -> Trainer Skills option from the Main Menu. Right click on the **Trainer Skills** option from the **Sub Menu** and select **New Trainer Skill**. The **Trainer Skill** screen will appear.

٢	Trainer Skill	
L	Skill Code *	
L	Name of Skill *	
L	Maximum Skill Level *	10 🔹

Figure 23: Creating new skills

To create a new skill enter a Skill Code, Name of Skill and Maximum Skill Level then click the Apply button.
6.5.2 Associating skills with trainers

To assign skills to a trainer browse to the Configuration -> Skills Training Manager -> Resources -> Trainers section and select a trainer from the Sub Menu. The Trainer screen will appear. Select the **Skills** tab at the bottom of the screen.

The Skills tab shows a table containing the selected trainer's skills. The table includes information about skills (Skill Code and Skill Name columns), Skill Competency, Train the Trainer Date and Course with Skill Last Trained. The Skill Competency column shows the trainer's current skill value for each skill. The Train the Trainer Date should be used to indicate the date on which the Trainer was taught the skill (this field is optional). The Course with Skill Last Trained field will be automatically populated by Training Manager based on the most recent Training Session that the trainer taught and that required the listed skill.

To add a skill to a trainer right click on the table and select the **Add Skill** option. Note that this option requires that you have at least one skill present in the Skills section and that the selected trainer doesn't already have all skills assigned to them.

Wo	orking H	lours \	Working Rules	Locations Skills	۵ ۵
Skill	Code	Skill Name	Skill Competency	Train the Trainer Date	Course with Skill Last Trained
				1 A	dd Skill

Figure 24: Adding skills to trainers

The **Choose Trainer Skill** dialogue will appear. Select a skill from the dropdown list, set a **Skill Competency** for the trainer and (optionally) set the **Train the Trainer Date**. Once you click **OK** the skill will be added to the selected trainer.

Locations Skills		
🔥 Choose Trainer Skill		×
Skill	👺 AS125 - Advanced Sales	-
Skill Competency (1)	<u></u>	
Train the Trainer Date	✓ 26 February 2014	
_	February 2014	.
	Mon Tue Wed Thu Fri Sat Sun	<u> </u>
	27 28 29 30 31 1 2	
	3 4 5 6 7 8 9	
	10 11 12 13 14 15 16	
	17 18 19 20 21 22 23	
	24 25 26 27 28 1 2	
	3 4 5 6 7 8 9	
	Today: 26/02/2014	

Figure 25: Resources view after setting required skills

Once you have created some skills and assigned them to trainers it will be possible to find the most suitable trainers for a training event based on required skills.

To do this create a training request and complete the start, user selection and training events tabs. Next click the **Schedule Event** button. The **Schedule Event** screen will appear. The skills required for the event should be specified in the **Skills** tab.

Event 1 - [S	chedule Event]				
Skills	Resources	Interruptible Activities	Scheduling Options	Optimised Search	Manual Search
Code		Name			
AS125		Advanced Sales			
BS574		Business Strategy			
IM143		Intermediate Marketing			



Once you have selected the required skill/skills click on the **Resources** tab. The left side of the screen shows Resources, including locations, rooms and trainers. The right side of the screen lists trainers, trainer skills and their values. This section is divided into sub-sections per skill. All trainers that hold the skill will be included in the relevant skill section and their records will be sorted based on highest skill competency first.

This section will show all skills regardless of whether they were selected in the Skills tab, however, skills that were selected will appear highlighted. For example, the following screenshot shows the **Resources** tab after selecting only the "Advanced Sales" skill from the **Skills** tab.

Event 1 - [Schedule Event] Skills Resources Interruptible Activities Scheduling Options Optimised	Search Manual Search
	Trainer Skill Competency Train the Trainer Date Course with Skill Last Trained AS125 - Advanced Sales Teny Bobbins 9 26 Feb 2014 Tricia Stephens 6 Robert Cinelli 3 BS574 - Business Strategy Teny Bobbins 6
	Tricia Stephens 6 Robert Cinelli 3 IM143 - Intermediate Marketing Robert Cinelli 13

Figure 27: Resources view after setting required skills

Trainers that are not selected in the Resources hierarchy will be listed on the right with their details shown in grey. Checking trainers on the left side of the screen will result in their skill records being shown in black and rising to the top of the list relative to other checked trainers' records based on skill competency.

It is possible to go back to the Skills tab and change the skill selection before returning to the Resources tab to review the trainer selection based on the newly selected skills.

Once you have selected some trainers for the event, continue to select **Interruptible Activities**, **Scheduling Options** and search for sessions using either **Optimised Search** or **Manual Search**.

When a trainer teaches a course with a skill that was required by the course, e.g. the skill was checked in the **Event - Skills** tab, Training Manager will automatically update the trainer's **Course with Skill Last Trained** value for that skill with the details of the event (event name and date). Consequently, the value of the **Course with Skill Last Trained** field will be empty if the trainer has never taught a training event that required the skill or the most recent event (and date) that the trainer taught that required the skill.

Feature Notes:

- The Trainer Skills feature supports schedulers in selecting trainers for training requests. Once trainers are selected for a training request the skills and skill values have no impact upon the optimised search algorithms that produce training sessions.
- Deleting skills will result in the skills being disassociated from trainers and their related details, e.g. skill competency, Course with Skill Last Trained and Train the Trainer Dates, will be lost.

6.6 Managers

Managers must exist in Training Manager to be able to schedule them for team meetings and one to one sessions.

Managers are maintained in SkillsAssessor. Preferably using OrgData.

Select **Resources**, and then select **Managers**. Right click on **Managers** in the sub menu to view the different viewing options available.



Figure 28: Creating new managers

If **View by Alphabetical Order** is selected, a list of existing managers is available in the **Sub Menu**. If **View by Location** is selected, a list of locations is available.



Sub Menu hints will identify which option has been selected.

Figure 29: Creating new managers

Below is an example of the **View by Location** option.



Figure 30: Viewing managers by location

The **Manager** screen appears, with options to configure information for the new manager. Configure the manager's default working hours in the **Working Hours** tab. Managers are maintained in SkillsAssessor so the top section is not editable.

Eile View Iraining Help	
Main Menu	Manager
🖌 🎋 SkillsPlanner	
Training Requests	First Name (New Manager)
Meetings	Last Name
a 🚆 Resource Calendars	Employee ID
🚮 Room Calendars	Monoper Detais
🚨 Trainer Calendars	manayer Delais
Anager Calendars	
* SkillsPortal Users	
a 🌐 Configuration	Adhe V
🖌 ች SkillsPlanner	Active 🔽
Training Categories	
Meeting Types	Working Hours Locations
💷 Booking Categories 🍰 Selection & Exclusion	
Bisection & Exclusion	Working Hours (Local)
Rooms & Locations	Start End Enable
Trainers	Mon 08.00 = 22:00 = 🗹
Trainer Skills	Tue 08:00 + 22:00 + P
Managers	Wed [08:00 +] [2:00 +] [7]
A SkillsPortal	
🔆 SkillsAssess	0000 * 6000 *
	Fri 08:00 🛫 22:00 🖶 🗹
Sub Menu	Sar 0000 - 2200 - 2
🖌 💷 Managers	Sun 08:00 - 22:00 - 1
Viewing Active by Location	
🚊 <no location=""></no>	These working hours specify local time to whichever Time Zone the Manager is working.
🚊 Atlanta	
🚊 Glasgow	
🚊 London	
🛄 Manchester	



Location : Main Menu			
Location : Main Manu Roger Harlan - [roger]	Colondar Colondar	training roadmap starting between 13 M 2012 and 13 Sep 2012 (A maximum of 5 Items are shown below) View the full Training Roadmap	Logout
SkillsPortal (LEX) 3.4.0727			Copyright @ 2012 Silver Lining Solutions Ltd. All Rights Reserved.

Figure 32: The training portal

Once the default working hours have been set in Training Manager, they can be changed in the manager's training portal.

The example below displays a manager's training portal home page with the following two options available under **your working hours**.

- set your regular working hours
- set exceptions to your regular hours

6.6.1 Setting Manager Regular Working Hours

After selecting an option, the **Set Working Day Defaults** window appears, enabling the manager to change their default working hours. The working hours must be defined, as Training Manager needs to know the manager's working hours.

Amend the hours as required, un-checking any days that are not working days. This automatically updates the manager's default working hours in Training Manager.

Location : Main Menu > Set Working Day Defaults Roger Harlan - [roger] Set Your Regular Working	I Hours	Logout
Information	Day Of Week Start Time End Time Is a Working Day	
Change the data to set your default working days and hours. This highlight represents a non-working	Monday 08 - 00 - 22 - 00 - 🔽	
day.	Tuesday 08 • 00 • 22 • 00 • 🔽	
	Wednesday 08 🔻 00 💌 22 💌 00 💌 💌	
	Thursday 08 • 00 • 22 • 00 • 🔽	
	Friday 08 • 00 • 22 • 00 • 🔽	
	Saturday 08 🕶 00 💌 22 💌 00 💌 🖾	
	Sunday 08 • 00 • 22 • 00 • 🔽	
	Save	

Figure 33: Setting regular working hours

6.6.2 Setting Exceptions to Regular Working Hours

This option allows the manager to define non-standard working hours where they are different than their default hours for whatever reason.

The working days table should not be used to take into account holidays or training days by selecting the dates as a non-working day.

Set Exceptions To Your Re	egular Working Hours
---------------------------	----------------------

Information		Month/Year:	March 🔻	2014 🔻						
Change the data below to set your default working days and hours.	Day of Week Use	Default Hours	Start Time	End Time	Is a Working Day	Day of Week Use D)efault Hours	Start Time	End Time	Is a Working Day
This highlight represents a non-working day.	Sat 1	4	00 🔻 00 🔻	00 🔻 00 🔻	1	Mon 17	4	00 🔻 00 🔻	00 🔻 00 🔻	1
🔺 Important	Sun 2	4	00 🔻 00 🔻	00 🔻 00 🔻	1	Tue 18	*	00 🔻 00 🔻	00 🔻 00 🔻	4
Please do not use this form to define periods of scheduled absence (e.g. Holidays, Training Days)	Mon 3	4	00 • 00 •	00 🔻 00 🔻	4	Wed 19	•	00 🔻 00 🔻	00 🔻 00 🔻	4
where you would otherwise be working.	Tue 4	1	00 • 00 •	00 🔻 00 🔻	1	Thu 20	1	00 🔻 00 🔻	00 • 00 •	V
This form is for specifying UNPAID, NON-WORKING time only.	Wed 5	4	00 • 00 •	00 🔻 00 🔻	×	Fri 21		00 🔻 00 🔻	00 • 00 •	V
	Thu 6		00 ¥ 00 ¥	00 🔻 00 🔻	V	Sat 22	*	00 🔻 00 🔻	00 - 00 -	
	Fri 7	4	00 ¥ 00 ¥	00 🔻 00 🔻		Sun 23		00 🔻 00 🔻	00 🔻 00 🔻	V
	Sat 8	v	00 • 00 •	00 🔻 00 🔻	V	Mon 24		00 🔻 00 🔻	00 • 00 •	v
	Sun 9	\$	00 • 00 •	00 🔻 00 🔻	1	Tue 25		00 🔻 00 🔻	00 • 00 •	A
	Mon 10	s.	00 • 00 •	00 🔻 00 🔻	×.	Wed 26	•	00 🔻 00 🔻	00 • 00 •	V
	Tue 11	4	00 • 00 •	00 🔻 00 🔻	V	Thu 27	•	00 🔻 00 🔻	00 • 00 •	V
	Wed 12	•	00 • 00 •	00 🔻 00 🔻	1	Fri 28	•	00 • 00 •	00 • 00 •	1
	Thu 13	v	00 • 00 •	00 🔻 00 🔻	V	Sat 29	•	00 • 00 •	00 • 00 •	V
	Fri 14	•	00 • 00 •	00 🔻 00 🔻		Sun 30	•	00 🔻 00 🔻	00 • 00 •	V
	Sat 15	v	00 • 00 •	00 🔻 00 🔻	V	Mon 31	•	00 • 00 •	00 • 00 •	A
	Sun 16	I	00 • 00 •	00 🔻 00 🔻	1					
	Save									

Figure 34: Setting exceptions to regular working hours

From the **Locations** tab, check the box to the left of the location that you want to associate with the manager. This is required as part of the meeting scheduling process, and will be covered in the **Meeting** section of this document.

After checking the relevant location, click **Apply**.

First Name *	Lorenzo	
Last Name *	Bratzo	
Employee ID *	6000	
Email Address		
Manager Details		
WFM ID	2C99021C-1850-38D8-0118-5224B5D60290	
Active		
Working Hours	Locations	\triangleleft
▲ Locations	al Time - America Chicago an	

Figure 35: Associating locations with managers

6.6.3 Deleting Managers

Managers are maintained in SkillsAssessor. Updates there will populate through to SkillsAssessor.

6.7 Globally excluding agents

There are two tabs in the Meetings User Selection tab:

Selection – Allows for the selection of agents for the meeting

Global Exclusions – Mark individuals with reasons for non-scheduled activity, for example, long-term sick, reassignment, maternity, and so forth.

To globally exclude an agent:

- Right-clicking agents in the selection tab
- Select Globally Exclude...
- Enter a Reason for Exclusion
- Click OK

The user will then appear in the Global Exclusions tab. It is possible to edit/remove an exclusion by right clicking on the user in the Exclusions List view and selecting the relevant option.

There is also the option to exclude either locations or teams for a specific date.

Click the **By Date** tab, and the hierarchy from WFM will appear to the right of a calendar. To exclude sites or teams for a specific date, click a date and then check the box next to the team(s) or site.



Figure 36: Excluding locations or teams by date

This will then highlight the date against the team.

To deselect a date and / or team, click the date and then un-check the team to remove the exclusion. When an exclusion has been set, the team or site can be selected as part of a training request but will not be scheduled on the configured exclusion date.



Figure 37: Removing exclusions

6.8 Viewing Scheduled Training Activity for an Individual

To view any historical training activity for an individual, find the individual in the **Main** view and then right click and select **Completion Status**.

Selection Global Exclusions
Display Mode WFM Hierarchical
🖌 📥 Blue Sky Airlines
a 📙 London
> 🃸 <none></none>
⊿ 🎇 UK_Supervisor A (Location: London HQ)
🚨 UK_Agent UK_Agent_002 (Location: London HQ)
UK_Agent UK_Agent 002 (Location: London H0)
Set Location
🚨 UK_Agent UK 💥 Remove Location
Sut_Agent UK
Source of the second status
UK_Agent UK Globally Exclude
💩 UK_Agent UK _Agenc_oos (cocarion, congon na)
🙈 UK_Agent UK_Agent_010 (Location: London HQ)
🙈 UK_Agent UK_Agent_011 (Location: London HQ)
🙈 UK_Agent UK_Agent_012 (Location: London HQ)

Figure 38: Viewing a user's past training activities

Enable Date Filte	5 Mar 2014 🗾 🗾 E	nd Date 19 Mar 21	14 💌						-	/ past tra visible a		-	-		
	Z Refre									e and st					,
Columns I Location I ·	'eam 🗹 Site 🗹 Busi	ess Unit													
			📮 Site	📥 Business Unit	Training Request	🥵 Code	🛞 Event	Start Date End D	ate 🚨 Trainer	🚨 Trainer Emp.ID	🗐 Room	Status	Trainer Comments	User Comments	Exclusion Rea
🗹 Location 🗹			🔲 Site	📥 Business Unit	🧠 Training Request	🥵 Code	🛞 Event	Start Date End D	ate 🔼 Trainer	👃 Trainer Emp.ID	Si Room	Status	Trainer Comments	User Comments	Exclusion Re

Figure 39: Viewing a user's past training activities

6.9 Room Bookings

6.9.1 Managing Room Bookings

Once rooms have been created they can be included as part of the optimized scheduling process.

The calendar management of the room must be kept up-to-date, as the application will avoid using any rooms that are not available.

Any scheduled room activity will automatically update the room calendar.

To manually enter a room booking, select **Room Calendars** from the **Main Menu**.

A similar tree view will appear in the **Sub Menu** listing all of the locations.



Figure 40: Manually creating a room booking

When you expand the location a list all of the rooms associated with it appears.

Ele View Iraining Help	
Main Menu	Room Calendar : Manchester Room 1
🖌 🎋 SkillsPlanner	
Training Requests	Start Date 07 Aug 2012 💌 End Date 21 Aug 2012 💌 🕼 Refresh
Meeting:	Start Time End Time Booking Category Purpose
Resource Calendars	
Room Calendars	
👃 Trainer Calendars	
Manager Calendars	
🎋 SkillsPortal Users	
Configuration	
SkilsPlanner	
Training Categories	
Meeting Types	
Booking Categories	
Selection & Exclusion	
Resources	
🔆 SkillsAssess	
Sub Menu	
a 📰 Room Calendars	
Viewing by Location	
(No Location)	
Atlanta	
⊳ 🛄 Glasgow	
⊳ 🚊 London	
a Manakester	
Ma New Room Calendar Entry	
Manchester Roun 3	
Preferences +	🗾 Export

Right-click the required room and the **New Room Booking** option appears.

Figure 41: Manually creating a room booking

After selecting **New Room Calendar Entry** the room booking form appears.

Elle View Iraining Help		
Main Menu	Room Calendar Entry	
⊿ 🍜 SkillsPlanner		
Training Requests	Room Manchester Room 1	
I Meetings	Booking Category (None)	
A 📲 Resource Calendars	Purpose	
Room Calendars		_ '\
🐣 Trainer Calendars		
🚨 Manager Calendars	Start Time 00.00 🚔 ど End Time 00.00	
🎋 SkillsPortal Users	Notes	- \
a 💮 Configuration		
🖌 👾 SkilsPlanner		
Training Categories		
Meeting Types		
Booking Categories		
in Selection & Exclusion		
Besources		\mathbf{A}
✓ SkillsAssess	S 2	elect the Booking Category
	0	elect the booking category
	f	and the share shares have and
		om the drop down box and
		· · · · · · · · · · · · · · · · · · ·
	C	omplete the start and end time.
Sub Menu		
Room Calendars	Δ.	ny matan ann alan ha inaludad
Viewing by Location	A	ny notes can also be included.
🚊 <no location=""></no>		-
Atlanta		lick on Apply once completed.
Basgow	Ŭ	
London		
a 🛄 Manchester		
Manchester Room 1		
Manchester Room 2		
🚮 Manchester Room 3		
Preferences •		Apply Cancel
	L	

Complete the details as required and click **Apply**.

Figure 42: Manually creating a room booking

The Room Calendar will now be updated with the new booking and Training Manager will avoid scheduling any training on the date and time in question.

Only manually entered room bookings can be deleted in the Room Calendar.

6.9.2 Deleting a Manual Room Booking

To delete a manually-entered room booking, right-click the calendar entry and then select **Delete**

Calendar Entry...

Training Manager will not allow deletion of any scheduled training activity in the Room Calendar.



Figure 43: Deleting a manual room booking

6.10 Enhanced Trainer Configuration and Visibility

6.10.1 Trainer Hierarchy

The ability to create trainer hierarchy is now available in the **Trainer** menu option.

After selecting **Trainers** from the **Main Menu**, select a specific trainer. The **Working Hours** tab will be available in the **Trainer** screen (in the example below, the Sub Menu view is **View by Alphabetical Order**). The option is now available to assign a manager from a drop-down list. The drop down list will contain all of the configured trainer names and therefore the manager must exist in the trainer list.



Figure 44: Creating a trainer hierarchy

Elle Yew Iraining Help	
Main Menu	Trainer
🖌 🎋 SkillsPlanner	
Training Requests	First Name Angle
III Meetings	Last Name Baker
a 📲 Resource Calendars	Employee ID 12345
🐔 Room Calendars	1 to 10
🚨 Trainer Calendars	Trainer Details
a Manager Calendars	
🎋 SkillsPortal Users	
🖬 🌐 Configuration	
🖌 🌴 SkillsPlanner	Manager (None)
Training Categories	Active (None)
Meeting Types	Active Chose Disor (2456) C Elone Forester (34567)
Booking Categories	Vorking Hours Working Rules Locations Skils
Selection & Exclusion	wang new wang new courses ones
a a s Resources	Working Hours Lunch
Rooms & Locations	Stat End Earliest Latest
Trainers	
III Managers	Mon 08:00 - 22:00 - 11:00 - 15:00 -
→→ SkilsAssess	Tue 08.00 + 22.00 + 11.00 + 15.00 +
-t- SKIISASSESS	Wed 08.00 - 2200 - 11:00 - 15:00 -
	Thu 08:00 = 22:00 = 11:00 = 15:00 =
Sub Menu	Fi 08.00 - 2220 - 11.00 - 15.00 -
Trainers	Sat 08:00 22:00 11:00 15:00 2
Viewing Active by Location	Sun 08:00 = 12:00 = 11:00 = 15:00 =
1 Internal	
🔜 <no location=""></no>	These working hours specify local time to whichever Time Zone the Trainer is working.
🚊 Atlanta	
⊳ <u> </u> Glasgow	
London	Update Information
a 🔜 Manchester	Created Thu, 09 Aug 2012 14:01 by IEXTotaViewImaster
🚨 Angie Baker	Last Updated Mon, 13 Aug 2012 16:04 by IEXT ctaView/master
🚨 Charlie Dixon	
🚨 Elaine Forester	

Figure 45: Setting a trainer's manager

To view the trainer manager hierarchy, change the Sub Menu view to **View by Hierarchy** by rightclicking the **Trainers** option in the **Sub Menu**.



Figure 46: Viewing the trainer hierarchy



Expanding the detail in the **Sub Menu** will reveal the trainers that report to the trainer manager.

Figure 47: Expanding trainer detail

The trainer manager can view the trainers associated with them and can select to view their activity in the training portal.

trainer calendar	
A Required fields	
Legend	Standard View Planner View
Scheduled Events partially or fully scheduled	Search Start Date 101 Jul 2012 🗮 End Date 28 Aug 2012 🗮 Sort By Trainer 💌 🚺
Completed	Go to Advanced Search
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	
O View by Location	
O View by Home Location	
 View by Alphabetical Order 	
C View by Hierarchy	
Select All Unselect All	
🖃 🕕 Internal	
🗖 🐣 Angie Baker (12345)	
🗖 🐣 Charlie Dixon (23456)	

Figure 48: Viewing trainer schedules within the SkillsPortal

6.11 Trainer Calendar

Trainer Calendar non-availability is managed either by updating the trainer calendar in Training

Manager, or individual trainers updating their web portal calendars.

To manage trainer availability in Training Manager, select **Trainer Calendar** from the **Main Menu**. The locations are then listed in the **Sub Menu**. Right-click **Trainer Calendar** to amend the view if required.



Figure 49: Setting trainer availability

To create a new calendar entry, right-click the required trainer and select **New Trainer Calendar Entry**. There are also the options available to change the view.

Elle View Iraining Help	
Main Menu	Trainer Calendar Entry
Main Maru Main Maru Main Maru Mathaner Meetings Meetings Conconce Celenders Conconce Cele	Trainer Calendar Enty Trainer Angle Baker (12345) Booking Calegory None> Pupose If Aug 2012 × Start Date If Aug 2012 × End Date If Aug 2012 × Notes End Time
Booking Categories Booking Categories Selection & Exclusion Figure Secures Trainers Managers SkillsAssess	
Sub Menu	



Complete the details as required, select **Booking Category** from the drop-down menu, and then click **Apply** once all of the details have been entered.

File View Training Help							
Main Menu	- Trainer Calendar	Entry					
▲ Straining Manager ▷ III Training Requests	Trainer	🚨 Daniel Olive	r [daniel]			•	
Meetings	Booking Category	🚮 Holiday				•	
Resource Calendars	Purpose	Holiday					
Room Calendars	Start Date	14 Sep 2011 [-	End Date	14 Sep 2011		
Anager Calendars	Start Time	08:00	₽ 2	End Time	08:00	-	
🥪 Training Manager Portal Users	Notes						
⊳ 🥌 WFM							
Configuration							
Sub Menu	-						
Trainer Calendars							
 Viewing by Location 							
No Location>							
⊳ <u>iii</u> London							
A Manchester	_						
Lucy McDonald	_						
Sachel O'Neill							

Figure 51: Setting trainer availability

Ele Yew Training Help	
Ele gew Traing Lets Man Meru Am Meru A	Trainer Calendar : Angie Baker Stat Dae [17 Aug 2012] End Dae [25 Sep 2012] @ @ Refresh Stat Tree Booking Category Pupose Monday, 17 Sep 2012 (2000) 17 Sep 2012 P Tr Sep 2012 (2000) 17 Sep 2012 New Calendar Entry P det Calendar Entry P belde Calendar Entry
Sub Menu Sub Menu Vening by Alphabelical Oxfor Angle Baker Example Soon Example Forester	

To delete a Trainer Calendar entry right-click the calendar entry and select **Delete Calendar Entry...**

Figure 52: Deleting a trainer calendar entry

The trainer can also manage their availability through their training portal. The option to insert any new activity is available within the **Training Manager View** of the **Trainer Calendar** by right-clicking in the calendar and selecting **New**.

trainer calendar		
🛆 Required fields		
Legend	Standard View Planner View	
No Category	🔲 Open in new window 📓 Click here to Refresh	
Holiday	Your current time zone is (UTC +00:00) Europe/London.	
Management Meeting	< Σ today 🖃 14 August 2012	Day Week Month
	Angie Baker	
Sidkness Training Session	g un New	
	10 m Toggle 24 Hours/Business Day	
	11 sm	

Figure 53: Managing trainer availability through SkillsPortal

6.12 Training Categories

The training categories are linked to the exception codes in WFM, and a training category must be selected when creating a training request. When training is scheduled it is the exception code that is displayed in the agent schedules, and therefore must already exist in WFM. Genesys WFM takes into account the impact of the exception code on the staffing levels as part of the WFM configuration.

To create a new training category, select **Training Categories** from the **Main Menu**; a list of existing categories appear in the **Sub Menu**.





Right-click Training Categories in the Sub Menu and the New Training Category option appears.

To create a new category, right-click **Training Categories** in the **Sub Menu** and select **New Training Category**.

Enter a new name together with any relevant notes.

Use the drop down Activity Code list to select the correct activity code from WFM to associate to the training category (this will ensure that the WFM rules and reporting is correct). After selecting the required exception code, click **Apply**.

Ele View Iraining Help Main Menu Training Category Name <New Training Category> Select which Notes exception code to Activity Code • associate with the Forced Day Off Unscheduled Wait List Funerals Training Holiday Open Personal 🐥 SkillsPortal Users Soliii-Portal Users
 Group Schliebortal Users
 Soliii-Portal Users
 Training Categories
 Meeting Types
 Booking Categories
 Selection & Exclusion
 Selection & Exclusion
 Selection & Locate Active training category and then click on OK. Resources
 Rooms & Locations
 Trainers
 Managers
 SkillsPortal
 SkillsAssess Sub Menu Training Categories Viewing A 🚯 E-Learning 🝺 Trainer Led

Please note that Training Manager does NOT create exception codes in WFM.

Figure 55: Creating a new training category

6.12.1 Deleting a Training Category

To delete a training category in Training Manager, right-click the training category and select **Delete**

Training Category.



Figure 56: Deleting a training category

6.13 Meeting Types

Meeting types are used when creating and scheduling meetings and one-to-ones that include the team manager. Different algorithms have been created to manage team group meetings or individual agent meetings which include the team manager. These algorithms must be associated with the correct meeting type.

Select **Meeting Type** from the **Main Menu.** Any existing meeting types are now visible in the **Sub Menu**.





To create a new meeting type, right-click **Meeting Types** in the **Sub Menu** and select **New Meeting Type**.





Complete the details as required, selecting the correct booking algorithm from the drop-down menu:

- **Meeting** Group and team manager
- One To One individual agent and team manager
- Solo Task individual agent

Meeting types are configured the same way as training categories. As with training categories used in training requests, the WFM exception code must already exist in WFM and exactly match the **Default WFM Exception** code entered.

Elle View Iraining Help				
Main Menu	Meeting Type			
⊿ 🍜 SkillsPlanner				
Training Requests	Name	<new meeting="" type=""></new>	Select the correct	
Meetings	Booking Algorithm	-		
Resource Calendars	Notes	Meeting One To One	booking algorithm.	
Room Calendars	NOICES	One To One		
🚨 Trainer Calendars				
🚨 Manager Calendars				
👫 SkillsPortal Users	Activity Code			
a 🎲 Configuration	Houring Code	<u> </u>		
🖌 🊧 SkillsPlanner	Active	V		
Training Categories				
Meeting Types				
Booking Categories				
🍰 Selection & Exclusion				
a 📲 Resources				
Rooms & Locations				
Trainers				
Managers				
🎋 SkillsPortal				
🎋 SkillsAssess				
Sub Menu				
Meeting Types				
🥜 Viewing Active				
💋 One to One				
A Team Meeting				
Preferences +				Apply Cancel

Figure 59: Creating a new meeting type

Use the drop down box to associate the correct Activity code.



After selecting the Activity code you want, click Apply to save your selection.

Figure 60: Associating an activity with the meeting type

6.13.1 Deleting Meeting Types

Delete a meeting type by right-clicking the meeting type and selecting **Delete Meeting Type...**

Ele View Iraining Help			
Main Menu	Meeting Type		
⊿ 🐥 SkillsPlanner			
Training Requests	Name	One to One	
Meetings	Booking Algorithm	Dne To One	
a 📲 🖁 Resource Calendars	Notes		
🚮 Room Calendars	110(03		
🚨 Trainer Calendars			
an Manager Calendars 🔒 🚨			
🎋 SkillsPortal Users	Activity Code	The to One	
a 🌐 Configuration			
🖌 🎋 SkillsPlanner	Active	v	
Training Categories			
Meeting Types	Update Information		
Booking Categories	Created Thu, 09 Au	ug 2012 13:53 by IEXTotaView/master	
Selection & Exclusion	Last Updated Thu, 09 Au	ug 2012 13:53 by IEXTota/View/master	
a and Resources			
Rooms & Locations			
Trainers			
Managers			
* SkillsPortal			
🎋 SkillsAssess			
Sub Menu			
🖌 📰 Meeting Types			
Viewing Active	New Meeting Type		
👲 Team Meeting 🖉 🖌 🖌	Delete Meeting Type 🧷		
10	view Active Meeting Types		
	/iew Inactive Meeting Types		
da puturon			Close
Preferences +			

Figure 61: Deleting a meeting type

6.14 Booking Categories

Booking categories are created for use in Portal for recording non-available time for managers and trainers.

Management meeting and Training session booking categories are for use when scheduling training and meetings in Training Manager and cannot be deleted or amended.



Figure 62: Creating a booking category

Give the booking category a name and select a colour to be displayed in the webportal.

There are several options now available for selection:

Room Calendar Category – Selecting this in the booking category applies to the room calendar. *This would not be applicable if the booking category was holiday.*

Trainer Calendar Category – Selecting this in the booking category applies to the trainer calendar.

Manager Calendar Category - Selecting this in the booking category applies to the manager calendar.

Is Working Time –This is not selected if this booking category does not constitute working time e.g. personal time which is unpaid by the organisation.

Active – The booking category is active and available for selection.



Figure 63: Creating a booking category

7 SkillsPortal

7.1 Skills Portal Users

Skills portal users are now configured in Skills Assessor.

7.2 SkillsPortal Configuration

Select the Portal menu option under Configuration to reveal additional functionality.

7.2.1 Authentication

There are Authentication options available in the Portal Configuration window that determine what mechanism is used when logging in.

Authentication		
User Name and I	Password	
SiteMinder	Authorization Header	HTTP_EIN
JZero LMS		
SLS Third Party	Authenticate with	Employee ID 👻
	Login URL	
	Logout URL	

Figure 64: Portal authentication configuration

7.2.2 Display of Items in Portal

Branding

Any changes required to the welcome or header title in Portal are managed in Training Manager, as are visibility of items on the training roadmap and the manager freeze window (i.e. the number of days that cannot be edited).

Welcome Title *	Welcome	
Header Title *	SkillsPortal	
Visibility		
Training Roadmap it	ems visible on the Home Page (max. 100)	5 🌲
Display "Pending Ap	proval" Training Requests and Meetings	
	Window	

Figure 65: Portal item display configuration

7.2.3 Attendees in Calendar Requests

This setting controls when attendees are included in emailed and downloaded session notifications.

Configuration

Include names of all participants in the body of meeting and training notifications

S	Don't Include	•

Figure 66: Attendees in calendar requests configuration

7.2.4 Pre-requisites for the Auto-Schedule Booking Requests from Portal Feature

To enable the auto-schedule booking requests from Portal feature, the feature must be enabled in the Configuration> SkillsPortal screen in Training Manager and the WFM Settings must be validated.

To enable the feature, select the Configuration > SkillsPortal option from the main menu in Training Manager. **Tick the Allow Auto-Scheduling of requests from Portal** option. Complete the User Name, Pasword, WFM Server Host WFM Server Proxy (optional) and Use HTTPS for WFM Connection (optional). Once these settings have been specified. Click the Validate WFM Settings button to test the provided settings. Click apply when the **Validation succeeded** message appears.

The option to automatically schedule booking requests through Portal will now be available providing at least one booking type exists and it has been mapped to a valid set of scheduling parameters via Portal.

8 Training Requests

To raise a training request, select **Training Request** from the **Main Menu**; the training request status menu will appear in the **Sub Menu**.

Training requests can be created by either right-clicking **Training Request** in the **Sub Menu**, or clicking the **Training** option above the **Main Menu**.

Create a training request through the relevant status option; for example, **Pending Approval**, and the application will automatically store the request.



Figure 67: Creating a training request

When the **New Training Request** option is selected, the template will appear, as in the example

below.

Ele yew Iraning Heb			
Main Menu Statt User Selection Training Events Training Exercise Completion Status Statistics			
⊿ 🔆 SkilsPlanner			
Training Requests	(9) Enter various descriptive and key information about this Training.		
Meetings	Main Title & Reference (New Training Request)		
▷ 3 Sector Calendars → SkillsPortal Users			
Configuration	Training Category		
· · · · · · · · · · · · · · · · · · ·	Description & Objectives		
	Business Spontors		
	Stakeholders		
	Additional Notes		
	Status I Pending Approval		
	SkillsPottal 🗌 Also displayed on the Training Roadmap		
Sub Menu	Dates		
Training Requests	Window Start Date 14 Aug 2012 💌		
🧐 8 Feb 2010 - 9 Sep 2012	Window End Date 14 Sep 2012		
O Pending Approval	Update Information		
(New Training Request)	Created Tue, 14 Aug 2012 13:22 by IEXTotal/view\master		
Training Request O Active	Last Updated Tue, 14 Aug 2012 13:22 by TEXT or any environmenter		
O Active O Completed	Last updated Tue, 14 Aug 2012 1322 by TCA locariew master		

Figure 68: Creating a training request

Complete the template as required (each of the tabs in the template will be covered separately).

8.1 Training Request Start Date Filter

A training start date filter is available as an option underneath Training Requests.



Figure 69: Training window start date filter

Training requests created outside of the date range will not be visible until you select the relevant date range.

Right-click the date filter; the option to open the training window filter appears, as in the example below.

Enter the required start date range and then click **OK**.

Only training requests that started within the date range selected will then be visible.


Figure 70: Setting the training window start date filter

8.2 Start Tab

Main Title & Reference – enter a title, and then enter the training code in the field to the right (this is mandatory).

Training code – the code associated with the training. This could be a code associated to some elearning content.

Training Category – identifies the category of training and the exception code that will be inserted into the agent schedules in WFM. The categories are available from a drop-down menu.

Description & Objectives –should contain information relevant to the training and will show against the training in the training roadmap.

Business Sponsors / Stakeholders / Additional Notes – enter any information here that is relevant to the training request. This information will also appear against the training in the training roadmap.

Status –three options are available from the drop-down menu:

• Pending Approval – this is used in the first instance when a training request is raised.

- Active this is used when the training request has been committed to WFM and is "good to go." For a training request to be visible in the web portal, the training request must be shown as
 Active and have Displayed selected on the Training Roadmap.
- **Completed** is used to store any completed training request.

Main Menu Stat User Selection Training Events Training Sessions Completion Status Statistics ▶ □ Training Requests W Enter valous descriptive and key information about this Training. Image: Statistics Image: Statis Image: Statistics Image: St	
A 1/4 SkitsPlanner	
Training Requests OP Training Requests OP Training Requests	
Medrops Main Tills & Reference (New Training Request) Additional Notes	
Sub Meru Sub Meru Sub Meru Statis Statis	
Preferences - CEreviour Next> Apply D	ise

Figure 71: Creating a training request

By default the training window dates will display one month from today's date. This can be manually changed so that training will be scheduled within a different date range.

The template will be updated with the administrator details (who created or updated the request and the date).

Ele View Iraining Help		
Main Menu	Statt User Selection Training Events Training Sessions Completion Status Statistics	< >
⊿ ≫ SkilsPlanner		
Training Requests	Enter various descriptive and key information about this Training.	
II Meetings ⊳ äi≇ Resource Calendars ₩ SkillsPontal Users	Main Tille & Reference (New Training Request)	
> 🎲 Configuration		
	Description & Objectives	
	Business Sponsors	
	Stakeholders	
	Additional Notes Amend the date	
	Status Perding Approval range as required.	
	SkillsPortal Also displayed on the Training Roadmap	
Sub Menu	Dates	
🖌 💷 Training Requests	Window Start Date 14 Aug 2012	
👰 8 Feb 2010 - 9 Sep 2012	Window End Date August 2012 D	
Pending Approval	Update Information 30 31 1 2 3 4 5	
	Created Tue, 14 Aug 21 6 7 8 9 10 11 12 Winaster	
> (1) Active	Last Updated Tue, 14 Aug 20 20 21 22 23 24 25 26 Winaster	
Dompleted	27 28 29 30 31 1 2 3 4 5 6 7 8 9	
	Today: 14/08/2012	
	1	
Preferences +	< <u>Elevirous</u> <u>Newt</u> > <u>Ecoly</u> <u>Close</u>	se

Figure 72: Creating a training request

Once all of the information has been completed, select **Apply**, or click the **User Selection** tab to move to the next stage.

8.3 User Selection

This is where the users are selected (there can be multiple selections).

In the example below, there are multiple MU's to select users from, which can be expanded to view the Agent Groups. Full teams or individual users can be selected by expending the Agent Group and selecting individual agents. A user count will be visible at the bottom of the screen.

There is the option to select individual agents or select all agents.

Selection Global Exclusions	
Display Mode WFM Hierarchical	Choose
a 🚔 Blue Sky Airlines	
> 📃 London	
🖌 📃 New York	
⊳ □ 📸 <none></none>	
🖌 🗔 🎆 NY_Supervisor A	
🔲 📇 NYAgent01 NYAgent01	
🔲 📇 NYAgent02 NYAgent02	
🔲 🐣 NYAgent03 NYAgent03	
🔲 📇 NYAgent04 NYAgent04	
🔲 📇 NYAgent05 NYAgent05	
🔲 📇 NYAgent06 NYAgent06	
🔲 📇 NYAgent07 NYAgent07	
🔲 📇 NYAgent08 NYAgent08	
🔲 🚨 NYAgent09 NYAgent09	
🔲 🚨 NYAgent10 NYAgent10	
🔲 🚨 NYAgent11 NYAgent11	
🔲 🚨 NYAgent12 NYAgent12	
🔲 🚨 NYAgent13 NYAgent13	
🔲 🚨 NYAgent14 NYAgent14	
🔲 🚨 NYAgent15 NYAgent15	
🔲 🚨 NYAgent16 NYAgent16	
🔲 🚨 NYAgent17 NYAgent17	
🔲 🚨 NYAgent18 NYAgent18	
🔲 🚨 NYAgent19 NYAgent19	
🔲 📇 NYAgent20 NYAgent20	
🔲 🚨 NYAgent21 NYAgent21	
🔲 🙈 NYAgent22 NYAgent22	

Figure 73: Selecting users

Display Mode WFM Hierarchical 🖌 📥 Blue Sky Airlines E London 🖌 📃 New York ⊳ 🔲 欎 <None> 🖌 🔲 🃸 NY_Supervisor A 🔲 🙈 NYAgent01 NYAgent01 🔲 💍 NYAgent02 NYAgent02 🔲 🐣 NYAgent03 NY/ 🚊 Set Location... Remove Location... 🔲 各 NYAgent05 NYA 🔲 🐣 NYAgent06 NYA 🌍 Completion Status... 🔲 各 NYAgent07 NYA Globally Exclude... 🔲 💩 NYAgent08 NYAgentoe 🔲 🚨 NYAgent09 NYAgent09 🔲 🐣 NYAgent10 NYAgent10 🔲 🚨 NYAgent11 NYAgent11

There is also the option to associate a Location with an individual if required.

Figure 74: Associating a location with an individual

8.3.1 Choose

There are additional options available by clicking the **Choose** button. The **User Selection Filter** screen appears, as in the example at the bottom of the page.

Start User Selection Training Events Training Sessions Completion Status	Statistics 🗸
 Choose the users from workforce management who will be getting this training. Selection Global Exclusions 	d D
Display Mode WFM Hierarchical	Choose.
 ▲ Blue Sky Airlines ▶ London ▲ New York ▶ 谷 <none></none> ▲ 谷 NY_Supervisor A ■ 梁公 NYAgent01 NYAgent01 	Click on Choose to access additional selection options.
NYAgent02 NYAgent02	
Image: Second	#

Figure 75: Filtering the user selection

Elle View Training Help								
Main Menu			1 11					
🖌 🏯 SkillsPlanner		Statt User Selection Training Events Training Sessions Completion Status Statistics						
Training Requests		Choose from Workforce Management who will	be receiving this Training.					
Meetings		-						
B and a source Calendars	🙈 User Selection Filters				- 🗆 🗵	Choose		
	O The selections on all tab	is combine together to apply the filtering.		Columns		d D		
Configuration	Skills SkillsAssess	SkillsAnalysis Pattern Matching		V Location V Management Unit				
	SKIIS SKIISASSESS	SkiisAnaysis Palleri Malcring		First Na Last Na Employ 🔜 L 🥩 M				
		▼ Add		Tistiva Editiva Elipidy In C W				
	1041							
	1Test Skill 2 Test							
	34							
	6001 6002	-1						
	20002							
			Add Matches >					
Sub Menu								
Sub Menu								
Intering nequests 8 Feb 2010 - 9 Sep 2012								
O Pending Approval								
🥵 Test Training Request								
Active								
D Completed								
				1				
				0 Match(es)				
				<u>K</u>	<u>C</u> ancel			
		16 Selected				Clear		
					< Previous	Next> Apply Dose		
💮 Preferences 👻								

Figure 76: Filtering the user selection

Users can now be selected by the options available.

In this example users can be selected by Skill and level. Select the skill required and then click on **Add**.



Figure 77: Filtering the user selection



Figure 78: Filtering the user selection

Below is an example showing users in the right-hand pane who have the **Customer Service** skill in their profile.

Eile View Iraining Help					
Main Menu		Start User Selection Training Events	Training Sessions Completion Status Statistics		()
⊿ 🤲 SkillsPlanner		Start User Selection Training Events	Training Sessions Completion Status Statistics		
Training Requests		Choose from Workforce Management who will	be receiving this Training.		
Meetings	Suser Selection Filters			- 🗆 ×	
▷ 📲 Resource Calendars	Super Selection Filters				Choose
🎋 SkillsPortal Users	O The selections on all tab	s combine together to apply the filtering.	Columns		d D
Configuration	* Skills SkillsAssess	SkillsAnalysis Pattern Matching 🔹 🔿	🔽 Location 🔽 Management Unit		
			First Name		
	Customer Service	▼ <u>A</u> dd	Cynthia		
	Customer Service	= 1 ×	Daniel		
	Customer Service	= 1 🗙	Diana Emily		
			Emma		
			Ethan		
			Glenda Grace van Buren		
			iex		
			Isabella		
			Jacob		
			Add Matches> John		
			John		
			Jordan Tillson, Jr		
			Jose		
Sub Menu			Justin Kathleen		
🖌 💷 Training Requests			Kayla		
8 Feb 2010 - 9 Sep 2012			Kiholik		
🖌 🕕 Pending Approval			Kyle Lucky		
🧠 Test Training Request			Lucky		
Active			Lucky		
D Completed			Lucky Madison	 	
			Malion		
			Score Manager		
				<u>.</u>	
			261 Matches		
			\smile	OK Cancel	
		16 Selected			Clear
Preferences •				< <u>P</u> revious	Next > Apply Dose



Additional activities can be included within the **User Selection** list by selecting an additional Skill from the drop-down menu, removing the original selection first, and then clicking **Add Matches**. The **User Selection** window appears, with three options:

- Add to existing add any agents that are not already in the user selection list.
- **Replace existing** only show agents with the second activity in the user selection list.
- **Cancel** cancel the selection and clear the user selection.

This can be done as a combination across all of the user selection filter tabs.





When you click **OK** the users will be displayed in the user selection tree. See the example below.

8.3.1.1 Selecting Users for Training/Meetings by DNA Scores

If Training Manager has been integrated with SkillsAssessor it is possible to select users for training/meetings based on their DNA scores. To do this. Select a meeting/training request and browse to the User Selection tab. Click the right arrow button to the right of the set of tabs until the DNA tab is visible. Clicking on this tab allows for the specification of a Job Role and/or KPI with a set of controls for setting the score range. Clicking the Add Matches button will then add all of the users who have the job role/KPI assigned to them and their score falls in the specified value range based on their most recent KPI/job role score.

Clicking OK will then add the users to the meeting/training request's user selection.

s Optimizer SkillsAnalysis Pattern Matching * DNA @		umns Location V Team V	Site 🔽 Business Unit	t
C DNA Selection		Name Last Name	Employee ID	Loca 🎇 Te
Job Role			1 UK_Agent_001	Paul Sch
Management -	L	JK_Agent UK_Agent_002	2 UK_Agent_002	Paul Sch
Drill Down				
Management 🗸				
User Range				
Low 50.00 Potential Matches: 3				
High 100.00 🛫				
	Add Matches >			
	•			

Figure 81: Choosing users by DNA score

Notes: Adding users from the DNA tab will result in the previous user selection being replaced by the users who matched the DNA score search.

<u>Eile View Iraining H</u> elp						
Main Menu	Start User Selectio	n Training Events	Training Sessions Completion Sta	atus Statistics		
🖌 🔆 SkillsPlanner	Start Oser Selectio	in aning Events	Training Sessions Completion Sta	atus 51aosocs		
Training Requests	Choose from Work!	force Management who w	all be receiving this Training.			
Meetings		icros management mis r	and be recentling one manning.			
Freedungs	Start Date 01 Ma	r 2010 💌 End	Date 14 Mar 2010 💌 🤗 Refresh			Choose
SkillsPortal Users	I I I I I I I I I I I I I I I I I I I	a 2010	Tra mai 2010			1.0100000
	Main Selection	Global Exclusions				4 D
> 🎲 Configuration	man	GIODALEXCITASIONS				
	Select All 🗔 Un	select All				
	First Name Last N	ame Employee ID	📃 Location 🥥 Management Unit	Exclusion Reason		
	89	89	Serviço			
	8 258	258	Atlanta Sales MU			
	8 321	321	Atlanta Sales MU			
	a 326	326	Atlanta Sales MU			┓┛│ /
	B B B 258 Comparison 258 Comparison 258 Comparison 258 Comparison 258 Comparison 258 Comparison 252 Comparison 252 Comparison 253 Comparison 252 Comparison 258 Comparison 258 Comparison 258 Comparison 258 Comparison 258 Comparison 258 Comparison 268 Com	308	Atlanta Sales MU			
	A 320	320	Atlanta Sales MU	Users are selec	ted	
	323	323	Atlanta Sales MU			
	A 279	279 336	Atlanta Sales MU	automatically fro	om tha	
	A 335	336	Atlanta Sales MU Atlanta Sales MU	automatically in	JII UIE	
	340	340	Atlanta Sales MU Atlanta Sales MU			
	292	292	Atlanta Sales MU	previous filter so	reen	
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	A 286	286	Atlanta Sales MU			-
	A 285	285	Atlanta Sales MU			
Sub Menu	303	303	Atlanta Sales MU			
	8 341	341	Atlanta Sales MU			
🖌 📰 Training Requests	288	288	Atlanta Sales MU			
👰 8 Feb 2010 - 9 Sep 2012	8 304	304	Atlanta Sales MU			
Pending Approval	a 269	269	Atlanta Sales MU			
🥵 Test Training Request	A 267	267	Atlanta Sales MU			
Active	8 329	329	Atlanta Sales MU			
D Completed	283	283	Atlanta Sales MU			
	A 262	262	Atlanta Sales MU			
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	A 290	290	Atlanta Sales MU Atlanta Sales MU			
	337	337	Atlanta Sales MU			
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	305	305	Atlanta Sales MU			
	334	334	Atlanta Sales MU			•
		1.2				
	276 Selected					Clear
						
Preferences +					< Previous Next >	Apply Cancel

Figure 82: Display of selected users

Eile <u>V</u> iew Iraining <u>H</u> elp						
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⊿ 🔆 SkillsPlanner						
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Resource Calendars	Sta	art Date	01 Mar 201	0 🔻	End Date 14 Mar 2010 💌 🥔 Refresh	Choose
👫 SkillsPortal Users			6			
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a 🕕 Pending Approval						
🍓 Test Training Request						
Active						
O Completed						
						· · · · · · · · · · · · · · · · · · ·

There is also the option to remove or add any user to the **Global Exclusions** list.

Figure 83: Managing the global exclusions list

8.3.1.2 SkillsAssessor

The SkillsAssessor option will only be available if SkillsAssessor is mapped across to Training Manager. This allows for the selection of users based on their assessment results at assessment or content level.

A list of assessments will be available for selection based on the date range.

The assessments can be expanded to view the associated modules to select from. In the example below, the **Hardware** module has been selected, and any agents who achieved results between 0% and 90% have been requested. Five users have been identified and are visible in the pane on the right. This allows training activity to be based on assessment results; therefore, only training based on knowledge or skill gaps will be scheduled.

8.3.1.3 Skillsanalysis

The option to select users based on the analytics area of SkillsAssessor is also available (providing that SkillsAssessor is integrated into Training Manager)

A list of the training sessions created in SkillsAnalysis will be visible and available for selection as per the example below.

8.3.1.4 Pattern Matching

This allows for keyword searching as in the example below.

Once agents have been identified and selected, update the agent count by clicking **Update Matches**. The individual agents will then be visible in the **User Selection** window.

Name Stati Use Selection Training Sensor: Completion Salue: Statistics • • • Staff area • • • • Order Name • • • • • • • • • • • • • • •	Ele View Training Help							
Control C	Main Menu		Start Hear Selection Training Events	Training Services Co	mulation Statue Statistice	-		4.0
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Preferences • Cencel	Preferences *				[< <u>Previous</u>	Next > Apply	<u>C</u> ancel

Figure 84: Using pattern matching to search for agents

Click **OK**, and then click **Apply** and move on to the next tab.

9 Training Events

This is where events are created for the training request. An event will be created for you automatically for each training request when you first access the Training Events tab. Right click on the training request and select New Event to create additional events. The training request name will appear automatically.



Figure 85: Creating an event for a training request

9.1 Creating a New Event

Once the new event icon has been selected the template will appear as per the example below. It can be renamed and a description can be included in the **Event Details** area:

Elle View Iraining Help			
Main Menu	Start User Selection Training Events	Training Sessions Completion Status	Statistics
⊿ 🤲 SkillsPlanner			
Training Requests	Oreate and manage Training Events to specify		
Meetings Besource Calendars	i 🞦 🗙 💿 🖲	Event Details	Include any description here.
SkillsPortal Users	a 🧠 Test Training Request	Description Public Description	include any description here.
D Configuration	Event 1		Any information in the Public
			description will appear with the
		SkillsPortal Content Link	training request details e.g.
			bring a notebook etc.
		Training Category 🕠 Trainer Led	billig a holebook etc.
_		Delivery Method	
	Rename the	Scheduling Options	
		Duration (hh:mm) 01:00 Repe	eat Days
	event if required.	Duration includes Tr	
		Min. Group Size	
Sub Menu		Min. Group Size 🛛 📑 📃	schedule Eve for e-Learning. This url link
🖌 📰 Training Requests		Max. Group Size 🛛 🛛 式	will automatically be
🧐 8 Feb 2010 - 9 Sep 2012		Costs	will actornationly be
O Pending Approval G. Test Training Request		Event Cost 0.00	presented to the users as
Active		0.00	
O Completed			part of the training request
			detail for the users to
			select.
			Select.
Preferences -			< <u>Previous</u> <u>Next ></u> <u>Doce</u>

Figure 86: Creating a new training event

• **Description** – information entered here is only visible in Training Manager.

• **Public Description** – information entered here will be visible in the web portal and can be used to communicate any pre-attendance requirements to the delegates.

SkillsPortal Content Link – a URL can be entered here that will allow a user direct access into the web page through their web portal view (this will depend on any internal firewall constraints).

Training Category – this is selected from a drop-down menu (the associated exception code and color will be published in WFM).

Delivery Method – this is selected from the drop-down menu; there are two methods available:

- Classroom the agents will be scheduled in groups.
- E-Learning the agents will be scheduled individually.
- Duration this is the time duration of the training.
- Repeat Days if this is a single day then keep this at 1. If the training is over consecutive days then amend this figure to the number of days e.g. 2

Duration includes Trainer Lunch Break – select this if the training will impact on the trainer lunch break requirements. If the training is for a full day then this will need to be selected as training cannot be scheduled to allow for the trainer to have a lunch outside of any training.

Keep teams together – select this if the teams are to be scheduled together with no other team members included in the sessions.

Min. Group Size – the minimum number of users to be scheduled.

Max. Group Size – the maximum number of users to be scheduled.

Enter the course duration. **Repeat Days** is selected if the training is for more than 1 consecutive day.

Select Completion Status to view the agents who were selected in the user selection.

Selecting **Duration Includes Trainer Lunch Break** will exclude the trainer lunch requirements as the trainer will manage lunch as part of their training session. If this is not selected then the application will try and schedule training around the trainers lunch break requirement which will be impossible if the training is set up as an all-day event.



Figure 87: Creating a new training event

Once all of the details are entered, select **Schedule Event** or right-click the event name to open the Scheduler.

9.2 Schedule Event

There are five tabs in the **Schedule Event** section:

- Resources
- Interruptible Activities
- Scheduling Options
- Optimized Search
- Manual Search

Eile View	Iroining Help		
Main Menu	🕼 Event 1 - [Schedule Event]	_ 🗆 🗵	4 D
⊿ 🏯 Skillsl ⊿ 🔝 T	Resources Interruptible Activities Scheduling Options Optimized Search Manual Search	<	
€ ■ ↓ ** F • • • • • • • • • • • • • • • • • • •	Resources Adaxia Adaxia Adaxia Gisgow Anoheter Wancheter Room 1 Good Mancheter Room 2 Mancheter Room 3 Cool Anoheter Room 3 Cool Darle Dion Coole Dion Elane Forester		
	Choose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver this Training		
Sub Menu	Select All 💥 Delete 🖉 Refresh 🚽 Export		
⊿ 💷 Traini 🐖 8 ⊿ 🕕 F	Exceptions of Missing		
A ()	Schedule (0)		
• () ⊂	🔟 Sync Status Start Date End Date 🧕 Room Seats 🕹 Trainer Employee ID # Uters # Attended # Completed Ceated 🕭 Name(;)		
	0 Rem(s)		
	Completion Status		
Preference	Ime Ready Wednesday, 15August 2012 16:15 BST Ime Zet ss ◆	<u>ne</u> ¶:i <u>C</u> lose	Ð

Figure 88: Scheduling an event: resources

9.3 Resources

This is where the rooms and /or trainers are selected as part of the training request.

Expand the location(s) for the training, and any associated rooms and trainers are then visible for selecting.

Select the room(s) and trainer(s) by clicking the box to the left.

If no room(s) and / or trainer(s) are required, nothing should be selected.

If there is only a requirement for reserving rooms, right-click the location name and select **Reserve Places**.

Reserved Places (0 = Reset)	X
<u> </u>	

Figure 89: Reserving places

Enter the number of places and click **OK**. This will show against the location name.



Figure 90: Display of reserved places

Select the preferred rooms by checking the box to the left of the room name. Training Manager will reserve room(s) up to the number of places requested as part of the scheduling process. Remember to select the rooms to be reserved and the trainers, if required.

To remove **Reserved Places** enter **0** to reset.

Training Manager can create any combination of room, trainer and agent. The following pages will demonstrate some of the different training scenario options available.

9.3.1 Scheduling a Combination of Trainer, Room and Agent

Where a trainer and room are required as part of the agent scheduling process, first identify the locations that are affected and then expand to view the **Rooms** and **Trainers** that are associated with them.



Figure 91: Scheduling a combination of trainer, room and agent

The room(s) and trainer(s) required are selected by checking the box to the left.

Once the room(s) and trainer(s) have been selected, click the **Interruptible Activities** tab to confirm/select which activities are interruptible.

9.3.2 Interruptible Activities

Activities will automatically be selected as interruptible in Training Manager. Activity Sets, Meals, Breaks, Marked Time and Exceptions are manually selected.

If a new Activity has been created then it will not be retrospectively selected as interruptible. If this needs to be included in the training request it will have to be manually selected.

Class Training (Request) - [Schedule Event]					
Skills Resources Interruptible Activities Scheduling Options Optimised Search Manual Search					
Activity					
🖉 🏶 BillingGoldEmail					
🛛 🖉 🏶 BillingGoldVoice					
MileageCredit					
VacationPackages					
Activity Set					
WhitiMedia_Activities					
Second Se					
Break					
Break 1					
Break 2					
Neal State S					
Marked Time					
Andatory Overtime					
By PW Marked Time By Requested Overtime					
Exception - Please note that interrupting Exceptions is irreversible.					
Coaching Session					
A Full Sick Day					
28 New Hire Meeting					
Deto-One					
By Partial Sick Day					
🗆 🧟 Team Meeting					
🖫 Select All 💥 Delete 🔗 Refresh 📕 Export					
"j seleti Ali 🔥 velete 😥 reliesh 💓 Export					
Exceptions 💋 OK 🌈 Missing 🦃 Overwritten 🗳 Overwritten (cannot be interrupted)					
Master Schedule (0) Scenarios (0)					
😸 Sync Status Start Date End Date 🌉 Room Seats 🚨 Trainer Employee ID # Users # Attended # Completed Created 🚨 Name(s)					

Figure 92: Interruptible activities

9.3.2.1 Marked Time and Time Off Overlay Exceptions

When a scheduled Training slot is over written within WFM with either a Time off type or Marked Time the status flag with change colour. The flag will be purple to show that the slot has been overwritten by Time Off and blue for Marked Time.

Start User Selection	Training Event	s Training Sessi	ons Com	pletion S	itatus
Wiew all Training Ses	sions for all Training I	Events and synchroniz	ation status wit	h Workd	orce Mai
🗔 Select All 🔀 Delete	e <i>2</i> Refresh 🛃	Export			
Exceptions 🎒 OK	🎒 Missing 🛯 🗐 Ov	verwritten 🛛 🗐 Overv	vritten (cannot b	oe interru	upted)
Master Schedule (9)	Scenarios (0)				
😸 Sync Status	Start Date	End Date	Room	Seats	🚨 Т
Event 1					
🎒 Training Class	21 Mar 2017 10:45	21 Mar 2017 12:45	Board Room	1-20	Briony
💐 Training Class	22 Mar 2017 09:15	22 Mar 2017 11:15	Board Room	1-20	Briony
M Training Class	23 Mar 2017 09:45	23 Mar 2017 11:45	Board Room	1-20	Briony
Training Class	26 Mar 2017 09:15	26 Mar 2017 11:15	Board Room	1-20	Briony



9.3.3 Scheduling a Combination of Room and Trainer Only

To create a training schedule for room(s) and trainer(s) only, for example, where there is a new intake of agents who have not commenced employment and are therefore not scheduled in WFM, Training Manager still must be configured with all of the relevant information. This excludes the User Selection up to the Scheduler stage, as in the example below.

To reserve the correct number of rooms, right-click the required location. A **Reserve Places** option appears.

Event 1 - [Schedule Event]	
Resources Intemptible Activities Scheduling Options Optimised Search Manual Search Workforce Schedule: Master Schedule> Image: Resources Image: Image	Right click on the Location and select reserved places. The reserved places window will then appear.
Oncose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver this Training.	

Figure 94: Scheduling a combination of room and trainer only

After selecting **Reserve Places**, enter the number of agents expected and click **OK**.

This identifies the number of places Training Manager needs to reserve for training.

🛃 Event 1 - [Schedule Event]	
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search	
Workforce Schedule : Master Schedule>	Places reserved against the location. Select the required trainers and rooms.
Ochoose the Schedule(s) where the Event will be booked, and also the Rooms and Trainers to host and deliver to	his Training.

Figure 95: Display of reserved places

Once the resources have been identified, click the **Interruptible Activities** tab. Select any activities that can be interrupted by Training Manager.

Activity		London 🔒	New York 🔒	San Francisco 🛛 🗐	Tokyo
Activity					
🗖 🏶 BillingGoldChat	Yes	Yes	Yes	Yes	
🔲 🏶 BillingGoldEmail	Yes	Yes	Yes	Yes	
🔲 🏶 BillingGoldVoice	Yes	Yes		Yes	
🔲 🏶 BillingGoldVoiceSF			Yes		
🔲 🏶 BillingSilverChat	Yes	Yes	Yes	Yes	
🔲 🏶 BillingSilverEmail	Yes	Yes	Yes	Yes	
🔲 🏶 BillingSilverVoice	Yes	Yes	Yes	Yes	
🔲 🏶 LostLuggage	Yes	Yes	Yes	Yes	
🔲 🏶 LoyaltyCard	Yes	Yes	Yes	Yes	
🔲 🏶 MileageCredit	Yes	Yes	Yes	Yes	
🔲 🏶 VacationPackages	Yes	Yes	Yes	Yes	
Activity Set					
🗖 🏶 Email		Yes			
🔲 🏶 LostLuggage		Yes			
🔲 🏶 LoyaltyCard		Yes			
🔲 🏶 MileageCredit		Yes			
🔲 🏶 MultiMedia_Activities	Yes				
🔲 🏶 VacationPackages 🗌		Yes			
🕽 Select All 💢 Delete 🔗 Refresh 🛛 🙀 Export					
exceptions 🍠 OK 🥰 M	issing				
Master Schedule (0)	cena	ios (0)			

Figure 96: Setting interruptible activities

9.3.4 Agent Only Scheduling

To schedule agents only, create the training request using the template wizard as usual, selecting the required agents in the **User Selection** window. Ignore **Resources** and continue from the **Optimised Search** tab.

9.4 Scheduling Options

The scheduling options tab allows for any amendments to be made before scheduling the training activity.

E Event - [Schedule Event]						
Resources Interruptible Activities Scheduling Options Optimised Search Manual Search						
Duration						
Duration (hh.mm) 01:00						
Duration includes Trainer Lunch Break						
Repeat Days						
Group Size						
Min. Group Size 0 🖨 Max. Group Size 0 🖨						
Team-Based Scheduling						
Keep teams together ADG Name W This is a Global setting which will apply to all Training.						
Save Cancel						
🗄 🗔 Select All 💥 Delete 💋 Refresh 🔓 Export						
Exceptions 🥥 oK 🧖 Missing						
Schedule (0)						
📧 Sync Status Start Date End Date 🛃 Room Seats 🚨 Trainer Employee ID # Users # Attended # Completed Created 🚨 Name(s)						
0 Item(s)						
Completion Status	ОК					

Figure 97: Setting scheduling options

9.5 Optimised Search

The Optimisation Search Template (see the example below) uses business constraints when scheduling training activity.

It is divided into five sections:

- 1. Training Window
- 2. Time & Travel Constraints
- 3. Performance Constraints
- 4. Booking Strategy

5. Training Sessions

Ele View Training Heb	
	- U ×
Skill Resources Intemptible Activities Scheduling Options Optimized Search Manual Search Optimized Search Algorithm Template Morking Hours (Local) Madays Stat End Enable Morking Time I Travel Constraints Morking Time I Travel Constraints Morking Time I Template	uid Dates
Amount	
Not Menu 🛛 Select All 🗙 Deleta 🖑 Refresh 💭 Export	<u>S</u> earch ⇒
Image: Training and the second of the se	Q D
A IEX Sync Status Statu Date End Date And	
0 Rem(s)	
Completion Status	<u></u> K

Figure 98: Optimized search options

9.6 Training Window

The dates in the Training Window are brought over from the date range entered in the **Start** tab of the **Training Request**. The training times are built from the **Working Hours** start and end dates and from the enable days.

Different templates can be created by changing the **From** and **To** times, and selecting or deselecting any days between Monday to Sunday. Information can also be changed within **Time & Travel Constraints** and **Performance Constraints** and saved as a new template by clicking the **Save** button. Once the template is saved, the option to rename it appears, which then creates a new template. Once the template has been saved it will be available for selection in the drop-down menu.

Once the training window has been configured with the required days and times, click the **Build Dates** button. This will create the training window slots based on the dates and time constraints.

	Stat End Enable 00:00 22:00 P Stategy P Distate House House Broup S	Image: Big (UTC +00.00) Europe/London State Date Time End Date T 1 Mar 2010 08.00 1 Mar 2010 2 2 Mar 2010 08.00 1 Mar 2010 2 2 Mar 2010 08.00 1 Mar 2010 2 4 Mar 2010 08.00 2 Mar 2010 2 5 Mar 2010 08.00 5 Mar 2010 2 6 Mar 2010 08.00 5 Mar 2010 2 7 Mar 2010 08.00 7 Mar 2010 2 9 Mar 2010 08.00 7 Mar 2010 2 9 Mar 2010 08.00 7 Mar 2010 2 10 Mar 2010 08.00 1 Mar 2010 2 11 Mar 2010 08.00 1 Mar 2010 2 11 Mar 2010 08.00 1 Mar 2010 2 11 Mar 2010 08.00 1 Mar 2010 2 12 Mar 2010 08.00 1 Mar 2010 2 13 Mar 2010 08.00 1 Mar 2010 2 14 Mar 2010 08.00 1 Mar 2010	Selecting Build Dates will populate the training windows with the dates and start and end times.
Select All X Delete & Refresh Export Exceptions OK Missing Schedule (0)	Use the sa a new tem templates selection f	ave button to creat aplate. Any existing are available for from the drop dowr	9

Figure 99: Creating optimised search algorithm templates

9.6.1 Excluding Training Dates

To exclude specific dates from scheduling training activity, right-click the specific date within the training window and select **Remove**.

Efe Yew Iraining Help								
Main Meru 🛛 Event 1 - [Schedule Event]								
🖌 🎋 Skillsl	Resources Interuptible Activities Scheduling Options Optimised Search Manual Search							
ال ال ال ال ال ال ال ال ال ال	Optimized Search Algorithm Template Working Heurs (Local) Madage: Image: Im							
	Retrieve fresh data from WFM 🗹 Search -							
Sub Menu	🕞 Select Al 💥 Delete 🔗 Refresh 🙀 Export							
🧃 🔝 Traini								
	8 Enceptions of ok of Masing							
⊿ 🕕 F	Schedule (0)							
A ()	😇 Sync Satus Start Date End Date 🛃 Room Seats 🙇 Trainer Employee ID # Users #Attended # Completed Created 🗟 Name(s)							
⊳ 🕕 C								

Figure 100: Excluding training dates

9.8 Time and Travel Constraints

This relates only to the room and trainer activity.

9.8.1 Transition Time (minutes)

This allows the application to build in a natural break for the trainer and the room between the training sessions.

In the example on the previous page, 15 minutes has been entered against transition time. Training Manager will build in a natural 15 minute gap between the previous training session and the next, for both the room and the trainer if this resource has been selected as part of the scheduling process. Training Manager will also look to see if it can schedule the transition gap of 15 minutes at the start or end of the shift so as to minimise non-productive time.

9.8.2 Minimum Activity Gap Before

The **Minimum Activity Gap Before** specifies a minimum amount of time that an agent has to be on the phones before they can have a training session scheduled if the training session is booked after the user starts their work day (this will not affect a training session that has been scheduled for the beginning of an agent's work day). This could be at the start of the day or after some other off-phone activity, for example, breaks.

9.8.3 Minimum Activity Gap After

This is similar to **Minimum Activity Gap After** but specifies the minimum amount of time an agent has to be on the phones after a training session has finished. For example, it would not be ideal if the session finished 10 minutes before the end of the agent's shift, as the agent may not sign back on the phones, which would affect their adherence.

9.8.4 Trainer Travel

This option is selected when non-home trainers are selected to be used as part of the training resource. It is recommended that this is not selected in the first instance in order to prioritize home-location trainers first; you can then re-run the scheduler to use trainers that have to travel.

9.9 Performance Constraints

9.9.1 Coverage Tolerance

This is the difference between staffing required (calculated) and the scheduled open for the duration of the training session, so how much tolerance can be given for scheduling the training.

The application looks at the required staffing based on forecast service level and the scheduled open, so actual scheduled against required. The coverage tolerance is the difference between the staffing you have working (scheduled open) and what is required (required).

For example, if the required number of agents is 100 across the duration of the training, and the scheduled open is 90, if the coverage tolerance was -20 only 10 would be selected, as the staffing is

already 10 short. Training Manager would not schedule any training activity if by doing so the coverage would then drop below the -20 requirement.

9.9.2 Coverage Target

Use the drop down box to select a Coverage Target, e.g. Site (Forecast), Site (Required), Activity (Forecast) or Activity (Required).

9.9.3 Retrieve Fresh Data from WFM

This can be left as selected, as Training Manager will retrieve the most up-to-date information from WFM to start scheduling training activity.

<u>E</u> lle <u>V</u> iew	yew Iraining Help	
Main Menu	Meru 🔄 Event 1 - [Schedule Event]	
🍙 🏯 Skillsl		
⊿ 🗆 Т	T Resources Interruptible Activities Scheduling Options Optimised Search Manual Search	• • •
((Optimised Search Algorithm Template Working Hours (Local) Window: 1 Mar 2010 to 14 Mar 2010	Build Dates
. N	📰 Խ All days 🗾 属 🗶 Start End Enable	
4 X E		0 D
ē,	Image: Start Date Time (mins) 0 mm Tue 08:00 mm Image: Start Date Time Image: Start Date Time 1 Mar 2010 08:00 1 Mar 2010 22:00 Image: Start Date Time 1	
🎋 Skillsl		
⊿ ۞ Confi; ⊿ ≫ S		
Ē	Performance Constraints Sat 08:00 🚔 22:00 🚔 🔽	
E	Coverage Tolerance 3 = x □ Sun 08:00 = 22:00 = ✓	
E B		
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₩ S		
🊧 S	* S	
		Retrieve fresh data from WFM 🔽 Search ⇒
Sub Menu	Menu 🛛 🕞 Select All 💥 Delete 🥔 Refresh 🙀 Export	
a 🔝 Traini		
<u>≶</u> 8 ⊿ 🚺 F		
		0 D
4 🕕		
⊳ 🕕 C		

Figure 101: Default retrieval of fresh data from WFM

9.10 Booking Strategy

Booking Strategy gives the user the option to specify whether the training requests should be front loaded, randomly distributed, back loaded together with the option to maximize group size, or scheduled to minimise coverage disruption.

By selecting **Front Load** or **Back Load**, Training Manager will try to schedule all of the training sessions at the front or the back of the training window, while taking into account the performance constraints, as in the example on the next page.

[Vent] - [Schedule Event]							
😨 Event] - [Schedule Event]							
Resources Interruptible Activities Scheduling Option	ns Optimised Search Manual S	earch					
Optimised Search Algorithm Template	Build Dates						
<not set=""></not>	Working Hours (Local) Start End Enable	Window : 11 Jan 2013 to 11 Feb 2013	build Dates				
Time & Travel Constraints Mon			d D				
Transition Time (mins) 0 💭 Tue							
Min. Activity Gap Before (mins) 0 🐳 Wed							
Min. Activity Gap After (mins) 0 💭 Thu							
Trainer Travel Fri	00:00 🗢 00:00						
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Figure 102: Selecting a booking strategy

Select **Randomly Distribute** from the drop-down menu under **Booking Strategies** and Training Manager will try to schedule the training activity across the training window, taking into account the performance constraints, as in the example on the next page.

The **Minimise Coverage Disruption** strategy will cause Training Manager to prioritise potential booking slots that have the biggest difference between coverage and the WFM forecast, i.e. it will maximise the 'headroom' between the actual staffing level and the required level according to the WFM system.

Once everything has been entered, update the Optimization Search Algorithm Template by clicking the **Save** button. You will have the option to either save the template with the same name, or give the template a new name, which will appear in the drop-down menu as a separate template for selection.

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Click **Search** to retrieve fresh data from WFM.

Figure 103: Saving an optimization search algorithm template

Training Manager is retrieving information from WFM, and information about what the application is doing will appear at the bottom of the window.

The option is also available to cancel at any time during the scheduling process. Refresh the screen during the scheduling process will update any training sessions created or after cancelling to ensure that there were no training sessions created prior to cancelling.

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Figure 104: Progress status

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Notification that Training Manager has finished will be given at the bottom of the screen.

Figure 105: Notification of completed search

9.11 Training Sessions

Once completed, the training sessions are visible in the **Training Sessions** window, and the red flag to the left indicates that the training has been created in Training Manager but has not been committed to WFM.

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Figure 106: Display of search results

A breakdown of the information in the **Training Sessions** window is as follows:

Start Date - identifies the date and time that Training Manager has scheduled the session.

End Date – identifies the date and time that the session is scheduled to end.

Room – the room scheduled to hold the training. Training Manager will have looked at the room availability and facilities, such as the minimum and maximum number the room can hold for training.

Seats - the capacity of the room.

Trainer – The scheduled trainer. Training Manager will have checked the trainers' calendar to make sure that they are available and can train in the required location.

EmployeeID – the trainer's Employee ID.

#Users – the number of agents who have been identified from their shifts in WFM and are available.

#Attended – attendance is updated through the register by the trainer from their web portal view.

#Completed – as per Attended.

Created – the date and the time that the training sessions were created.

Name(s) – the names of the delegates.

Completion Status – selecting this will present the status of all agents selected for training, as in the example on the next page.

To view any additional information select the **Completion Status Report** which will include the following information:

- Location
- Team
- Site
- Business Unit

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Figure 107: Viewing additional information via the completion status report

See the example below.

A gauge has also been included which allows you to view how complete the training event is. There is an export option in the bottom right-hand corner where you can export the information into Excel.

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Figure 108: Exporting results to an Excel spreadsheet

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Figure 109: Filtering results using the drop-down menu

9.12 Optimized Algorithm Results for Trainer and Room Only Scheduling

When scheduling for trainer and room activity using the Reserved option, the scheduler only creates training sessions for the room and trainer, taking into account the minimum and maximum group size and the room capacity.

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Figure 110: Scheduling training sessions for trainers and rooms using the reserved option

Agents can be scheduled into these training sessions at a later date, either by cancelling the room and trainer sessions and then re-running the Scheduler after selecting the users from the **User Selection** tab,

or

by selecting the agents in the **User Selection** tab and then right-clicking the individual training sessions, as in the example below.

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Figure 111: Selecting agents in the user selection tab

Manually select the users from the right pane and click **<Add>.** This will assign the user to the training session.

Note: If the user's schedule does not fit the training window an error will appear. This option could be used for an individual user, but deleting the training sessions and re-running the schedules with the users as part of the equation is recommended.

It is possible to amend the training session end time if required using the up and down keys. After selecting OK, Training Manager will check that there are no conflicts with the trainer or room, or whether the agent schedules still fit within the training session times. If the time is extended, the coverage tolerance will not be taken into account due to the change being manual.


Figure 112: Amending training session details

9.13 Committing Training Activity into WFM

The training must be committed to WFM in order to view the impact. Highlight the training sessions (this can be done in bulk or individually) by highlighting one session and then right-clicking it and selecting **WFM**, or use the **Select All** button.

After selecting **WFM** the available options are:

- **Publish** this will commit the training session and publish in WFM.
- **Remove** this allows for the training sessions to be removed but still keep the created training session details.

To remove and delete the training sessions either click **Delete** or click **Select All** and then click the

X Delete... button.



Figure 113: Removing training sessions

If you select **Publish**, Training Manager will then start to commit the training to WFM. A pop-up window will appear alerting you that publishing the training sessions may take a few minutes. Click **Yes** to continue.

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Figure 114: Publishing training sessions

When publishing is complete, the red flags will turn green to confirm that the training exceptions have been committed to WFM.

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Figure 115: Notification that the training exceptions have been committed to the WFM

Click **Refresh** to update the schedules with the new activity.

WFM will now include the training exceptions within the schedule or scenario selected in the **Resources** tab. Training Manager has inserted the exception into the relevant agent schedule, which has automatically reduced the coverage by the number of agents and the time and duration of the training.

9.14 Cancelling a Training Session

Training sessions created through Training Manager should only be cancelled by Training Manager, as the application will track the training requirements and activity.

To cancel a training session and remove the exceptions from WFM, highlight the training session to be

cancelled and then right-click it and select **Delete**, or use the Kelete... button.

There is also the option to only remove the training sessions from WFM to view whether the training needs to be cancelled if by taking agents off the phone for training will impact performance.

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Figure 116: Cancelling a training session

The session will be removed from the **Training Sessions** window and the agents that were scheduled for that session will be identified as unscheduled when viewed in the **Completion Status Report**.

The exceptions will be removed from WFM after refreshing the data.

9.15 Cancelling a Training Session for an Individual

A training session can be cancelled for an individual by expanding the training session, right-clicking the session, and then selecting **Training Session Details**. This will list all of the delegates for that training session together with the room and trainer if they have been scheduled as part of the training session. See the example on the next page.

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Figure 117: Cancelling a training session for an individual

Once the agent details are visible in the **Training Session Details** window, users can be manually removed by highlighting the individual and clicking **Remove**. This will remove the user and put them in the **Not in Training Session** pane on the right.



Figure 118: Cancelling a training session for an individual

The agent will then appear in the **Completion Status Report** as unscheduled.

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Figure 119: Display of completion status report for unscheduled agents

Agents that have not been scheduled or have not attended the training and need to be scheduled later will remain as part of the original training schedule and can then be scheduled as "Mop Ups" if required.

9.16 Training Session Backfill

The backfill feature provides the ability to add users to existing training sessions that have spaces available, rather than automatically creating new training sessions. This feature can be used to add users who have not previously been scheduled or who have missed previous training sessions (mop-ups) to existing sessions.

Backfill is enabled on a per-training event basis and is enabled by default. It can be enabled/disabled from the Training Events tab when creating or editing training requests, or from the Scheduling Options tab when scheduling a training event.

Searching for training sessions with the backfill option disabled will result in the search algorithm creating new sessions for users as normal.

Notes:

- Backfilling of users only applies to future sessions (it is not possible to backfill users into training sessions that occurred in the past).
- Backfilling is not supported for meeting requests/meeting sessions.
- The 'Keep teams together' option will be respected for users who are backfilled into existing sessions.
- Backfill is supported for both the master schedule and for scenarios. It is possible to copy backfilled sessions from scenarios into the master schedule. Once users are booked onto sessions on either the master schedule or a scenario, they will no longer be available for backfilling on another schedule.

10 Scheduling pre/post course assessments from Skills Training Manager

Skills Training Manager supports the ability to associate SkillsAssessor assessments with training requests. Assessments can be set to be completed either before the training course begins, after it ends, or both. This feature can be used to, for example, assess how valuable a training event was by comparing the assessment results of a group of users prior to and after the training session. A single training session can have multiple pre and post course assessments associated with it. It is also possible to associate the same assessment to be taken before and after the course. Assessments assigned to users will then be visible to training attendees either by logging in to SkillsAssessor, Portal or via the Notifications application.

10.1 Assigning pre/post course assessments

Create a new training request. Complete the start tab and click next. Complete the user selection tab and click next. Create a new training session under the event. Right click on the new session and hover over the 'Add' option. This will cause two sub-options to appear: 'Pre-Course Assessment' and 'Post-Course Assessment'. Select which type of assessment you wish to add. A Skills Assessor login window will appear. Enter the details of a valid Skills Assessor user and click OK. Once logged in, an 'Assessments' screen will appear listing all available SkillsAssessor assessments.

By default, if the training session is removed from the WFM, the assigned pre and post-course assessments will also be unassigned from the course's users by the PrePostHelper application. This option can be overridden via the checkbox on the right side of the Assessments page.

There is also an additional option for pre-course assessments which allows the training scheduler to decide on the number of days the assessment will be available for prior to the beginning of the training session. This option is located on the right side of the Assessments window when assigning pre-course assessments. If this option is left at the default value of '0', the pre-post assessment will be available from the time it was published to the WFM until the first day of the training session. Alternatively, entering a value in this field will cause the assessment to be available for the set number of days prior to the beginning of the training session.

Once you have specified which assessment to assign and configured the remaining availability options, click OK to associate the assessment with the training session.

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Figure 120: Assigning assessments

It is possible to assign the same assessment as both a pre-course and a post-course assessment. However, the same assessment may not be re-used across multiple training events, i.e. once an assessment has been associated with a training request (as either a pre or post-course assessment), it will not be available for assigning in other training events.



Figure 121: Assigning assessments

10.2 Removing pre and post-course assessments

To remove an assessment from a training session right click on it in the Training Events tab and select the **Remove** option. Click the **Apply** button in the bottom right corner of the screen to save the change.

If a session has already been published it will not be possible to remove either pre or post-course assessments until the session is removed from the WFM.

10.3 Events that trigger the assigning of pre and post-course assessments

10.3.1 Pre-course assessments

Pre-course assessments are assigned once the session is published to the WFM and the preposthelper application has run. Pre-post assessments may not immediately be available to course attendees and may not be listed in their My Development pages depending on whether restrictions were placed on the assessment's availability prior to the course.

10.3.2 Post-course assessments

The assigning of post-course events is triggered by the completion of the attendance register (either via the Training Manager client or Skills Portal) and the running of the preposthelper application. For single session training requests, the post-course assessment will be assigned once the register for the session has been completed. For multi-session training requests the post-course assessments will be assigned only when the register for the last training session has been completed. Course attendees need only to attend and complete one of the sessions to be eligible to have the post-course assessment assigned to them, i.e. attendees need not attend and complete all training sessions in order to have the post-course assessment assigned to them.

Unlike pre-course assessments, post-course assessments will only be assigned to those users whose attendance records have been set to both 'attended' and 'completed' for any session in the training request. Users who have either attended or completed (or who have neither attended nor completed) the training session (or multiple training sessions) will not have the post-course assessment assigned to them.

11 Scheduling Mop Ups

Agents can be scheduled as part of the original schedule using the Mop Up process. The application will take any agents that have been identified as unscheduled (this will depend on the reason; for example, if the agent has not been scheduled any training activity due to them not having a schedule in WFM they will remain unscheduled) and look at scheduling them for a training session within the original constraints. For example, training window dates, days, hours, and minimum and maximum training numbers in a session.

To schedule agents that have either not been scheduled or have missed training, return to the Scheduler. To access the Scheduler, click the **Training Events** tab, select the event and then select **Schedule Events**.

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Figure 122: Scheduling mop ups

To re-run the Scheduler, select **Search**; the Scheduler will schedule any unscheduled agents for further training sessions, taking the original constraints into account.

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Figure 123: Re-running scheduler to mop up unscheduled agents

Once the Scheduler has finished, the **Completion Status Report** can be used to view any additional agent training sessions.

In the example below, Charlie Dixon has been scheduled for training and the red flag identifies that some or all of the training session is missing from the Master Schedule.

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Figure 124: Warning that some or all of the training session is missing from the master schedule

To schedule the additional training into either the Master Schedule or the Scenario, return to the main **Optimization Search Algorithm Template** and select the affected training session. Right-click it to select the relevant option, for example, **copy into the Master Schedule** or **schedule into Genesys WFM.**

12 Trainer and Room Hot Swaps

Trainers and / or rooms can be manually changed at any time within a scheduled training session.

To make any changes, the **Training Session Details** window has to be visible, as in the example below. To hot swap a room or a trainer, click the icon to the right of the room or trainer and the tree view with the trainer and room details by location appears. See the example below.



Figure 125: Manually hot swapping trainers and rooms

In the example below, **Room** has been selected, and the option to choose a different room appears.

After selecting an alternative room, click **OK**.



Figure 126: Manually hot swapping trainers and rooms

The application will then check to make sure that the room is available using the information in the

Room Calendar and it will also make sure that there is sufficient capacity for the number of users selected.

If the room is not available for any reason, an error will be displayed to the administrator allowing them to select another room, as in the example on the next page.

Once the training session has been updated with the new information, the relevant amendments will be made in the associated calendar entries.

Apply the same process when changing the trainer.



Figure 127: Room conflict error notification

12.1 Manual Scheduling

This option is available in Training Manager; however, we see its usage being very limited if at all and recommend that the Optimization Algorithm Template be used instead.

To schedule training session manually, the Training Request template needs to be completed up to the Scheduler or Optimization Algorithm Template option.

No resources are pre-selected as part of the manual scheduling process.

Select **Manual** from the tabs available; the **Training Time Slots** window will change as in the example below.

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Figure 128: Scheduling training sessions manually

The Event Details information is still visible, which identifies the name of the training together with the training window, duration, and minimum and maximum group sizes. This can be amended if required.

The date to search for users who fit the training criteria must be specified in the **Start Date** drop-down menu. After you have selected a start date, click **Search**.

Training Manager will present the time slots that fit the criteria in the training request.

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Figure 129: Display of available time slots

To schedule training, double-click the time slot; the **Training Session** window appears. This lists the agents available, the date, and the time of the session.

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Figure 130: Training session window

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🤲 Skilsi 🎻 🖉	000	Room	<none></none>	A Choose Trainer	
_ 30 Vol.10	07	In Training Session - *	AD-11 N-1 C1	View Active Trainers C View Inactive Trainers	
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	Comp				
Preference	EX → Ready			Thursday, 16 August 2012 12:23 BST Time Zo	ne 🧐:: Close
State el el el el les	· ·		1		

To include a trainer and / or a room, use the **Trainer** or **Room** selection icon.

Figure 131: Selecting a trainer

Once the trainer and/or room has been selected, click **OK**.

The training session that you created will then be visible in the **Training Session** window.

Once the training sessions have been created, they can be committed to WFM to view the impact on the coverage as per the Optimization Algorithm Template.

12.2 Deleting a Training Request

To delete a training request, any attached information must be disassociated and deleted first. The stepby-step approach must be done in reverse, and only when there is nothing associated with the training request can it be deleted.



Figure 132: Deleting a training request

13 Meetings

To create a meeting, select **Meetings** from the **Main Menu**. This is the same process that is used for creating team meetings and one-to-ones.



Figure 133: Creating a new meeting

A list of the locations will appear in the **Sub Menu**. The view can be changed to view by manager instead of location by right clicking on **Meetings** in the **Sub Menu**.



Figure 135: Expanding the location to reveal the associated managers

After clicking either the location or a manager, the meeting view will be presented in the **Main Menu** window (once meetings have been scheduled they will appear as a list in this window).

13.1 Creating a Meeting

Click New Meeting to reveal the step-by-step meeting template (as in the example on the next page, which contains some existing meeting templates.).

Ele View Iraining Help	
Main Menu	Meeting Filters
🖌 🎋 SkillsPlanner	Enable Status Filter
Training Requests	
Meetings	Enable Type Filter
Resource Calendars	
Room Calendars	🗹 Show items needing critical attention 3 🚋 days warning (Only applies to Meetings with Recurrence)
Trainer Calendars	Show items needing attention soon 10 🚔 days warning (Only applies to Meetings with Recurrence)
Anager Calendars	V Show items needing no attention
🐥 SkillsPortal Users	2 - of they notes frooting frootion in
a 💮 Configuration	🗖 Only show items without Next Dates
🖌 🏯 SkillsPlanner	\bigcirc
Training Categories	New Meeting 🕞 Check All 💢 Delete 🖉 Refresh 🎡 Next Dates 🐷 Optimised Searches
Meeting Types	Status Main Title Type Status 🦝 Manager 👼 Employee ID Stat Date End Date Next Stat Date Next S
Booking Categories	
all Selection & Exclusion	
b a sources	
🤲 SkillsPortal	
🎋 SkillsAssess	
Sub Menu	
a 🔝 Meetings	
Viewing by Location	
AND Location>	
🚊 Atlanta	
🚊 Glasgow	
🚊 London	
A 🔝 Manchester	
🚨 Roger Hatlan	
	🛃 Export
Preferences -	0 Ren(s)
	ik

Figure 136: Creating a new meeting

Click **New Meeting**; the step-by-step meeting template appears, with the tabs at the top of the page. In the **Start** window, complete the relevant sections to create the required meeting.

- 1. **Main Title** this is the meeting title that the manager and team would see against the meeting scheduled in their web portal.
- 2. **Meeting Type** select the relevant Meeting Type from a drop-down menu. There are three options to select from: **Team Meeting, One-to-One** and **Solo Task**.
- 3. **Description & Objectives** enter any relevant information about the meeting, as this will also be visible in the web portal against the meeting.
- 4. Location select a location for the meeting. A meeting's location is based on the location/locations assigned to the manager who has been assigned to the meeting. If the manager is only assigned to one location, the location field will be automatically populated when the manager is assigned to the meeting. If the manager is assigned to more than one location, these will appear in the Location select box. Agents associated with a meeting will have their locations updated to match the location of the meeting's manager.

- 5. **Manager** select which manager to associate to the meeting request (A **Solo Task** meeting does not require a manager).
- 6. **Status** There are three options:
 - a. **Pending Approval** is used for testing purposes where the schedules are not yet confirmed to appear in any web portal views.
 - b. **Active** is used once schedules are confirmed and are required to be visible in web portal views.

letails			
Main Title * Meeting Type * Description and			Enter a main title and use the drop down list to select the correct meeting type. Enter a mandatory description.
Objectives *			Select the manager from the Manager drop
Manager *			down box. The Location field will be automatically populated based on your
Location *		X	manager selection and will contain all of the
Status	Pending Approval	The Status setting will	locations to which the selected manager has
	Notify participants by email	affect whether meetings will appear in Portal.	been assigned.
lates			Select the Earliest Start and Latest End date. If
Start Date	07 Mar 2014 💌 > End	Date 07 Mar 2014 💌	this meeting will be used as a template the date/time frame defined here will be used for future scheduling.
mes			, the street ing.
Ea r liest Start Time	00:00	st End Time 00:00	
	O This time range applies to every data	ay in the above Date range.	
Duration (hh:mm)	01:00 ÷ Set the meeting	z duration.	

c. **Inactive** is used so that the meetings no longer appear as active.



- 7. Start Date by default the meeting window will be set to the current date.
- 8. End Date the end date can be selected by using the drop-down menu or by clicking the button, which then presents three options to select from. Click any of the options and Training Manager will automatically populate the end date.
- 9. Select the earliest start and latest end time that the meeting can happen.
- 10. Select the meeting duration.

>

13.1.1 Selecting Users

On the **User Selection** tab, select the users that the meeting is being created for.



Figure 138: Selecting the team in the user selection tab

Once the relevant users have been selected, click **Next** or click the **Meeting Scheduler** tab.

13.1.2 Scheduling

The meeting scheduler tab is where the information required to schedule the meeting is inputted.



Figure 139: Meeting scheduler tab

There are four tabs available for completion:

13.1.2.1 Resources

Select the required schedule, and there is the option to select a room to schedule for the meeting.

Start User Selection Meeting Scheduler Workforce Management
Choose Rooms, Interruptible Activities, set up constraints, recurrence options and perform the search.
Resources Interruptible Activities Optimised Search Manual Search
View Active Rooms O View Inactive Rooms
🖌 🕕 Internal
🚊 <no location=""></no>
Atlanta
⊳ 🛄 Glasgow
⊳ <u>III</u> London
🖌 🛄 Manchester
🔲 🛃 Manchester Room 1
Manchester Room 2
Manchester Room 3

Figure 140: Resources tab

13.1.2.2 Interruptible Activities

Select which activities can be interrupted as part of the scheduling process.

Resources Interruptible Activiti	es Optimised Search Manual Search
Activity	
Activity	
🗹 🏶 BillingGoldChat	
🗹 🏶 BillingGoldEmail	
🔟 🏶 BillingGoldVoice	
🗹 🏶 BillingSilverChat	
🗹 🏶 BillingSilverEmail	
🗹 🏟 BillingSilverVoice	
🗹 🏶 LostLuggage	
🗹 🏶 LoyaltyCard	
🗹 🏶 MileageCredit	
🗹 🏶 VacationPackages	
Activity Set	
🗌 🏶 MultiMedia_Activities	
Meal	
🗌 縃 Lunch	



13.1.2.3 Optimised Search

Select the required constraints as per scheduling training. Under Recurrence, select whether the meeting should be every N Days, Weeks or Months and on what days the meeting can be scheduled.

ecurrence			
Active			
Daily	Monday	Tuesday	
Weekly	Wednesday	Thursday	
Monthly	Friday	Saturday	
	Sunday		
Recurrence pe			
Attendance Constr		nce within each recurrence period on any of th	e days that are ticked between the Start Date and End Date
Min. % of Attendees Re		Front Load	

Figure 143: Setting required constraints via the optimised search tab

Figure 142: setting required meeting recurrence options

There are three recurrence options available, **Daily**, **Weekly**, and **Monthly**.

Within the performance constraints, select the required **Coverage Target** and **Coverage Tolerance**.

Attendance constraints only apply when scheduling a team meeting, as this is the minimum percentage (%) of attendees that the Meeting scheduler can schedule. It will always schedule the maximum number of attendees that it can based on the performance constraints.

Booking Strategy - select Front / Random or Back Load as with scheduling training.

Meeting Transition Time – It is possible to set a transition time for meetings and one-to-ones. This will prevent subsequent sessions for the same meeting request from being booked next to each other. For example, scheduling one-to-ones with multiple agents with a transition time of 15 minutes will prevent the sessions from starting within 15 minutes of a previous session ending.

Notes:

- The transition time rule is only applied to sessions in the same meeting request. Transition time will not be respected for sessions created via other meeting requests.
- If the meeting manager is also an agent in WFM then the transition time will not be taken into consideration when determining the possible start time for a meeting.

Click **Search** to retrieve fresh data from WFM.

13.1.2.4 Creating Meetings Manually

To create a meeting manually, select Manual Search from the Meeting Scheduler tab.

Elle View Iraining Help	
Main Menu	Start User Selection Meeting Scheduler Workforce Management
⊿ 🌴 SkillsPlanner	
Training Requests	W Choose Rooms, Interruptible Activities, set up constraints, recurrence options and perform the search.
Meetings	
a 📲 Resource Calendars	Resources Interruptible Activities Optimized Search Manual Search 0 D
🕺 Room Calendars	Start Date: = 01 Mar 2010 V = Performance Data
🚨 Trainer Calendars	
anager Calendars 🚨	Start Time End # Available) Click a slot in the lat to see the Performance Data during that slot.
🎋 SkillsPortal Users	
a 🎲 Configuration	
🖬 🌴 SkilsPlanner	
Training Categories	
Meeting Types	
Booking Categories	
A Selection & Exclusion	
Resources Rooms & Locations	
 Hooms & Locations Trainers 	
D Internets	
 Managers SkillsPortal 	
-T- DKIRHASEAS	
Sub Menu	
Meetings	
Viewing by Location	
No Location>	
Atlanta	
🚊 Glasgow	
London	
> 🔜 Manchester	
	Search ⇒
	Ø) Find slots manually. Manual searches ignore all constraints and Manager working hours.

Figure 143: Manually creating a meeting

After selecting the date, click **Search** to reveal the number of available agents by time slot.

Elle View Iraining Help	
Main Menu	Start User Selection Meeting Scheduler Workforce Management
⊿ 3% SkillsPlanner	
Training Requests	Choose Rooms, Interruptible Activities, set up constraints, recurrence options and perform the search.
Meetings	Resources Interruptible Activities Optimized Search dearch
Resource Calendars	Resources Interruptible Activities Optimised Search Manual Search 0
Room Calendars	Start Date: 👄 01 Mar 2010 🔹 🔿 Performance Data
A Trainer Calendars	
Anager Calendars	Stat Time End # Available 🔺 🥘 Click a slot in the fist to see the Performance Data during that slot.
A 💮 Configuration	0 08:30 09:00 1
⊿ 😤 SkilsPlanner	0 10:30 11:00 1
Training Categories	
Meeting Types	
Booking Categories	
Selection & Exclusion	
A 🚆 Resources	0 1200 1230 1
Rooms & Locations	0 1215 1245 1
Trainers	(i) 12:30 13:00 1
Managers	① 12:45 13:15 1
🎋 SkillsPortal	0 13:00 13:30 1
🎋 SkilsAssess	
	0 13:30 14:00 1 0 13:45 14:15 1
	▼ 13.45 14.15 1 ● 14.00 14.30 1
Sub Menu	
🖌 🔝 Meetings	0 14:30 15:00 1
Viewing by Location	① 14:45 15:15 1
A KNo Location>	(i) 15:00 15:30 1
🚊 Atlanta	① 15:15 15:45 1
🚊 Glasgow	
🚊 London	0 15:45 16:15 1 0 16:00 16:30 1
Manchester	0 16:00 16:30 1
	0 16.45 17.15 1
	(i) 17:00 17:30 1
	Show All Search
	Ø Find slots manually. Manual searches ignore all constraints and Manager working hours.

Figure 144: Viewing available agents for a meeting

Double-click the time slot to view a meeting session window similar to the meeting below. Click **OK** to create a manual meeting session.

Eile View	Iraining Help													
Main Menu	Meeting Session												<u>_ ×</u>	
🔺 🏯 Skilsl	Details													
⊳ 📰 T	Meeting	Team Meeting					_							
. h	Manager	<none></none>		Start Date	01 Mar 2010	▼ 13:15 ÷								d D
- 211 F	-													E I
7	Room	<none></none>	-	End Date	01 Mar 2010	13:45								
	In Meeting - * Bold = P													
🐥 Skilsl	In Meeting - " Bold = P Columns	lot Saved					Not In Meeting							
🖬 🎲 Confij														
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E	First Name Last Nar	ne Employee ID 🔜 Location	🥥 Manageme	ntllnit			First Name	Last Name	Employee ID	Location	Management	Unit Exclusion Rea	ason	
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										Publis	h automatically to WFN	и 💌 <u>о</u> к	Cancel	
: 🎲 Preference	es •													<u>C</u> lose

Figure 145: Meeting session window

The option to select a manager will appear. After selecting the manager, click **OK**. A meeting session will appear in the **Workforce Management** tab.

Eile View	Iraining Help				
Main Menu	Meeting Session				
🔺 🎋 Skillsl	Details				
> 📰 T	Meeting	Team Meeting			
IIIN ⊿ ãã F	Manager	(None)	S S	art Date 01 Mar 2010 🔽 13:15	d D
4.55	Room	(None)	<u></u>	nd Date 01 Mar 2010 🔽 13:45 🚍	
	ribbii	(None)			
8	In Meeting - * Bold = N	lot Saved		Not In Meeting	
🎋 Skillsl	Columns			🖹 Choose Manager 🔀	
a 🎲 Confi a 🎋 S	☑ Location ☑ Mar	nagement Unit		View Active Managers C View Inactive Managers	
				🖌 💩 Managers	
Ξ	First Name Last Nam Hortense Howard	ne Employee ID <u>Location</u> 5003 Manchester	💋 Management L	🗹 🗟 Diana Li 🚽 Nanagement Unit Exclusion Reason	
Ξ	Holtense Howard	i 3003 Manchestei	London MO	Roger Hallan Manchester London MU	
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Sub Menu					
🖬 🔝 Meeti					
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> 🚊 N				QK Cancel	
	I			Export>	
				Publish automatically to WFM 🔽 DK D	ancel
Preference	s *				<u></u> lose
-					

Figure 146: Selecting a manager for the meeting

13.1.3 Workforce Management

Select the Workforce Management tab to reveal the suggested meetings.



Figure 147: Workforce management tab options

The **Schedule** tab identifies the number of meetings created.

The red flag indicates that the meeting requests have not been committed to WFM. To commit the meetings into WFM, select the meeting sessions and commit them to WFM as per the training requests.

Clicking **Status** displays the scheduled meeting activity in report format.

Main Menu	Start User Sele	ction Meeting!	Scheduler Workford	e Management								
a 🎋 SkillsPlanner			L.									
Training Requests	Wiew all Meeting	gs and synchronizatio	n status with Workforce I	Aanagement.								
Meetings												
Besource Calendars	Meeting Session	s Status								I		
🛃 Room Calendars												
🚨 Trainer Calendars	Meeting User	Meeting User Status										
S Manager Calendars Meeting Session Filters												
🎋 SkillsPortal Users		Englin Dan Film										
a 🎲 Configuration												
🖌 🎋 SkillsPlanner	Start Da	Start Date 09 Aug 2012 P End Date 23 Aug 2012 P										
Training Categories	Enable S	abus Filter										
Meeting Types												
Booking Categories		*	🔗 Refresh									
🍰 Selection & Exclusion												
a 📲 Resources	Class											
	Columns											
Rooms & Locations		-										
 Rooms & Locations Trainers 		Management l	Init									
	✓ Location	-										
Trainers	First Name	Last Name Emplo	yee ID 🔝 Location	📁 Management Unit		Start Date	End Date	🚨 Manager	🛛 🚨 Manager Emp.ID			
 Trainers Managers 	Location First Name Abigai	Last Name Emplo Adams 5013	yee ID <u>Location</u> Manchester	London MU	Team Meeting	8 Mar 2010 08:00	8 Mar 2010 08:30	Roger Harlan	roger	<nc< td=""></nc<>		
⊳ 📰 Trainers III Managets ≫ SkillsPortal	First Name	Last Name Emplo Adams 5013 Adams 5013	yee ID Location Manchester Manchester	London MU London MU	Team Meeting Team Meeting							
⊳ 📰 Trainers III Managets ≫ SkillsPortal	First Name Abigal Chafes	Last Name Emplo Adams 5013 Adams 5013 Sharp 5014	yee ID Location Manchester Manchester Manchester	London MU London MU London MU	Team Meeting Team Meeting Team Meeting	8 Mar 2010 08:00 2 Mar 2010 09:00	8 Mar 2010 08:30 2 Mar 2010 09:30	Roger Harlan Roger Harlan	roger	<nc <nc< td=""></nc<></nc 		
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► T trainers Totiners Totiners Managers Skalfords Skalfords Skalfords Skalfords Skalfords (No Location (No Location (No Location Managery	First Name Abigal Abigal Chafes Glenda Biggoy Reki Ricky	Last Name Emplo Adams 5013 Adams 5013 Sharp 5014 James 5006 Parsons 5002 Steele 5004 Glover 5009 Glove Jr 5010	yee ID Location Manchester Manchester Manchester Manchester Manchester Manchester Manchester Manchester	London MU London MU London MU London MU London MU London MU London MU	Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting	8 Mar 2010 08:00 2 Mar 2010 09:00 2 Mar 2010 09:00	8 Mar 2010 08:30 2 Mar 2010 09:30 2 Mar 2010 09:30	Roger Harlan Roger Harlan Roger Harlan Roger Harlan Roger Harlan Roger Harlan Roger Harlan	roger roger roger roger roger roger roger	<nc <nc <nc <nc <nc <nc <nc <nc< td=""></nc<></nc </nc </nc </nc </nc </nc </nc 		
 ▶ Trainers Trainers Managers Managers	First Name Abigal Abigal Chafes Glenda Biggoy Reki Ricky	Last Name Emplo Adams 5013 Adams 5013 Sharp 5014 James 5006 Parsons 5002 Steele 5004 Glover 5009 Glove Jr 5010	yee ID Location Manchester Manchester Manchester Manchester Manchester Manchester Manchester Manchester	London MU London MU London MU London MU London MU London MU London MU	Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting Team Meeting	8 Mar 2010 08:00 2 Mar 2010 09:00 2 Mar 2010 09:00	8 Mar 2010 08:30 2 Mar 2010 09:30 2 Mar 2010 09:30	Roger Harlan Roger Harlan Roger Harlan Roger Harlan Roger Harlan Roger Harlan Roger Harlan	roger roger roger roger roger roger roger	<nc <nc <nc <nc <nc <nc <nc <nc< td=""></nc<></nc </nc </nc </nc </nc </nc </nc 		
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Figure 148: Display of scheduled meeting report

The Meeting Session Detail is also available, as when creating training sessions.

ni Meru Skill-Parner Skill-Parn	Start User Sek	gs and synch Status			rce Management						
	Meeting Session Meeting User Meeting Sessi	status		us with Workforce	Management.						
Meetings Schlafbanner	Meeting Session Meeting User Meeting Sessi	status		us with Workforce	Management.						
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Room Calendars Ariane Calendars Manager Calendars Skillerotal Uses Solial Dates Solial Dates	Meeting User Meeting Sessi	Status									
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Training Categories	🗆 Enable S										
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I	First Name	Last Name	e Employee II) 🛄 Location	🛛 🍯 Management Uni	t 📈 Meeting	Start Date	End Date	👼 Manager	🛛 🚳 Manager Emp.ID	51
I	Abigail				ndon MU	Team Meeting	8 Mar 2010 08:00	8 Mar 2010 08:30	Roger Harlan	roger	<nc< td=""></nc<>
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Menu	Gregory	Parsons	5002	Manchester	London MU	Team Meeting	2 Mar 2010 09:00	2 Mar 2010 09:30	Roger Harlan	roger	<nc< td=""></nc<>
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Figure 149: Meeting session details

There is also the option to remove the exceptions and keep the meeting sessions that have already been created, rather than removing the exceptions by deleting the meeting or training requests. Once the sessions have been committed, click **Close** to close the meeting session template.

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Sub Menu Meetings Viewing by Location Antarta Gistgow Gistgow Manchester Roger Hatan	۲ ۲ 2 Ren(s)
🛞 Preferences 👻	< Brevious Mexico Apply Disce

Figure 150: Closing the meeting session template

After closing the meeting request template, the meeting session now appears in the Meetings window, as in the example below.

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13.2 Duplicating a Meeting

Once a meeting has been created, it can then be copied over to other teams using the same format (this can be edited once created if required). Right-click the meeting request and select **Duplicate meeting...** from the available menu options.

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Roger Harlan													
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Figure 152: Copying a scheduled meeting to other teams

The **Duplicate Meeting** window from WFM appears, allowing you to select the users you want to create duplicate meetings for. You will be given the option to create a new meeting for each team with users selected or a single meeting containing all selected users.

Meetings

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Figure 153: Copying a scheduled meeting to other teams

By default, the main title shows as **Copy of Team x Monthly Meeting**.

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Figure 154: Output of copying a meeting to another team

The main title can be changed by either double-clicking the main title team name, or by right-clicking and selecting **Edit Meeting...** from the available menu options.

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Figure 155: Editing the details of the copied meeting

Once the meetings have been created and renamed accordingly, they need to be scheduled. This can be done by first selecting the required meetings by checking the boxes to the left and then selecting **Optimized Searches...**

The **Meeting Scheduler Options** message appears, as in the example below. By leaving **Automatically Publish Exceptions to WFM for all Meetings** selected, the meetings will be scheduled using the exact criteria specified in the original meeting, and the exceptions will be committed to WFM.

If the meetings are to be visible in the Web Portal make sure that the status is changed to **Active**.

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Figure 156: Meeting scheduler options
Once the optimized search has been completed the schedules can be viewed by double-clicking the required meeting to reveal the meeting template, and then selecting the **Workforce Management** tab to view the scheduled sessions. As the flags are green, the exceptions will have been committed to WFM.





Figure 157: Workforce management tab

There is an option to export the meeting session detail.

Within **Tooltip** is an indicator of whether the exceptions are OK in WFM. If any exception has been altered in WFM, the tooltip will reflect this.

13.3 Group Scheduling of Recurring Meetings

Once the team meetings have been created they can be rolled forward in groups rather than having to create each meeting for the following month individually or manually.

Select the required meeting by checking the boxes to the left, and then click **Next Dates**. The **Meeting Next Dates** message box will appear, as in the example below.

There are three options available:

• Suggest Next Dates for all selected meetings – by selecting this option, Training Manager will roll the dates forward using the date range of the current start and end dates. For

example, if the dates are currently for one month, then Training Manager will suggest dates for one month for the next month.

- Clear suggested Dates for all Meetings this will clear any next dates created.
- **Apply Next Dates for all selected Meetings** this will update the start and end dates with the next suggested meeting dates by replacing the current dates with the new dates.

To create the next period meetings, select Suggest Next Dates for all selected Meetings, and then click OK.

Note: If the date range-end date of the original meeting is in the past then Training Manager will set the Suggested Next Dates to start from tomorrow in order to prevent a new meeting being scheduled in the past. The duration of the window will be the same as the original meeting's.

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Figure 158: Meeting next dates message

The new suggested dates will then appear under Next Start Date and Next End Date.

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Figure 159: Suggested next meeting dates

If the meeting dates suggested are correct, select Next Date again, and then select the option Apply Next Dates for all selected Meetings.

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Figure 160: Confirming next meeting dates

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Booking Categories		Team Meeting			Diana Li	Diana	17 Aug 2012 08:00	24 Aug 2012 22:00	These state bale	Hex End Doc	30	Weekly (Mon, Tue, W
A Selection & Exclusion			Team Meeting		Roger Harlan	roger	17 Aug 2012 08:00	24 Aug 2012 22:00			30	Weekly (Mon, Tue, W
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The new dates will now replace the previous dates under Start Date and End Date.

Figure 161: Confirming changes to meeting start and end dates

Once the dates have been updated, click **Optimized Searches...** and Training Manager will use all of the criteria in the meeting request templates to schedule the meetings as required.

Checking **Automatically Publish Exceptions to WFM for all Meetings** will publish the exceptions to WFM, and by having the status as **Active**, the meeting sessions will appear in the manager and agent's web portals.

There are filter options available on the **Meeting Filters** screen to reduce the number of meetings visible and to serve as reminders:

- Enable Status Filter meetings can be viewed based on the status, for example, Pending Approval.
- Enable Type Filter this is based on meeting type, for example, Team Meeting or One-to-One.

The **days warning** filters are used where the currently scheduled meeting is within x days of the end date, and the meeting is recurring and needs to be scheduled for the following month. This allows only those meetings that need attention to be visible.

13.3.1 Selecting next dates for multiple meetings

The select next dates option within the meetings screen includes the ability to set the next start and next end dates for multiple sessions. To use this feature:

1. Check one or more meetings from the meetings table.

- 2. Click the Next dates button at the top of the table.
- 3. Click the Select next dates option.
- 4. Select the next start and end dates via the two datepickers.
- 5. Click OK.

Training Manager will then update the next dates for all selected meetings to the selected date range. The start and end times will be set to match the times specified in the original meeting.

Notes:

- It is not possible to set either a next start or end date that is in the past.
- If the original meeting start and end times were both set to 00:00 (midnight) and a single day
 next dates window is selected (i.e. both start and end dates are the same day), Training
 Manager will update the end time to 23:59. However, if the start and end dates are different the
 times specified in the original meeting will be applied.

14 Scheduling exceptions over exceptions

Previous versions of Training Manager supported the ability to publish training and meeting sessions to WFM that interrupted activities (but not exceptions) in Genesys WFM. Training Manager supports the ability to interrupt both activities and exceptions when publishing training and meeting sessions to WFM.

Notes:

- If a training/meeting session is published over another exception and then removed, the removed portion will not be replaced.
- It is not possible to interrupt an exception that was published via Training Manager.
- Standard scheduling rules, service level calculations and booking strategies still apply.

15 Timeoff

In Genesys it is possible to overwrite an exception with Timeoff. When this happens, the exception is still there, but because the agent may not be in work, they may not take their training. If viewing this in SkillsTraining Manager, you will see a purple flag indicating any agents that have time off.

16 Marked Time

In Genesys it is possible to overwrite an exception with Marked Time. When this happens, the exception is still there, but because the agent may be working on a project or as Overtime, they may not take their training. If viewing this in SkillsTraining Manager, you will see a blue flag indicating any agents that have Marked Time.

17 Team Based Scheduling

When scheduling training activity that requires the teams to be scheduled together create the training request as normal up to the Training Events tab as per the example below.

Select **Keep team together** and the **Optimised Search Algorithm** will keep the team members together.

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Main Menu	Start Herr Selection Training Fuents Training Sessions Completion Status Statistics
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Figure 162: Team based scheduling of training events

This will also be visible in the Scheduling Options tab.

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Figure 163: Setting the team-based scheduling option

Training sessions will be created around the minimum and maximum numbers of delegates required. View the training session details to confirm that the teams have been scheduled together as required see the example on the next page.

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a M- Skallat > □ T Resources Interruptible Activities Scheduling Options Optimised Search Manual Search 0	
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Figure 164: Display of training session details

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In this example only Team 1 members have been scheduled for this training session.

Figure 165: Example of scheduling a team for a training session

18 Training Manager Outlook Integration

Training Manager includes new Outlook integration features that support the automated sending of email notifications to meeting/training session participants. It is also possible for users to download Outlook appointment (ICS) files from Portal for any event they are set to attend.

18.1 Portal iCalendar File Download

Users logging in to Portal are now able to download an iCalendar (.ICS) appointment file via the **Add to Calendar** link for any meeting/training session that they are expected to attend. This will result in the download of an ICS file which can be opened in Microsoft Outlook and saved to the user's calendar.

UK_Agent UK_Agent_(005		
Tuesday, 10 January 2012			
05:45 - 06:45 GMT	Advanced Sales Module 1 ((AS111)) Trainer: Garry Bobbington / Room: Meetir	ng Room 131	
Training Request :	Advanced Sales Module 1 ((AS111))	🚨 Trainer :	Garry Bobbington
🚇 Training Event :	Event 1	🗐 Room :	Meeting Room 131
Add To Calendar			
Link : http://www.yourcompa	ny.com/advancedsales/		
Description : Initial discussion of ad	vanced sales techniques.		

Figure 166:Add to Calendar link in Portal

Note: The cancellation of a training event or meeting will not result in an update/cancellation to the appointments saved by attendees.

18.2 Training Manager iCalendar email notifications for meeting/training session attendees

The Training Manager meeting and training scheduler functionality now includes the ability to send email notifications to session attendees. When a meeting/training session is published with the "Notify participants by email" option enabled Training Manager will retrieve attendees' email addresses from WFM and send an email containing an iCalendar (.ICS) appointment. The appointment file will include the details of the training/meeting session. Attendees can then save the appointment to their Outlook calendars. If the training/meeting session is later removed from WFM Training Manager will automatically send cancellation notification emails to attendees.

18.2.1 Email Notifications: Meeting Sessions

To enable email notifications for a meeting select the meeting from the Meetings Sub Menu. Check the **Notify participants by email** checkbox from the meeting's start tab. Continue through the user selection and meeting scheduler tabs as normal. Publishing sessions that were found via optimised or manual searches will result in Training Manager sending meeting notification emails to the attendees. Removing

the meeting from WFM via Training Manager will result in cancellation emails being sent to the attendees.

Notes: Removing the meetings directly in the WFM will not result in cancellation emails being sent to the attendees.

Possible meeting sessions that have not been published will not result in meeting email notifications being sent to the list of attendees.

Emails will only be sent for sessions that are published to the master schedule (emails will not be sent for sessions that are published to scenarios).

Status	Pending Approval	•
	Notify participants by email	

Figure 167: Notify participants by email option

18.2.2 Email Notifications: Training Sessions

To enable email notifications for a training request open the training request from the Training Requests Sub Menu. Select the Training Events tab. Check the **Notify participants by email** checkbox from the **Scheduling Options** section and apply changes. Continue to schedule the event using optimised or manual search as normal. Publishing sessions to the WFM will result in Training Manager sending training request notification email to attendees. As with meetings, removing published training sessions from WFM will cause cancellation email notifications to be sent to attendees.

Scheduling Options
Duration (HH:mm) 01:00
Includes trainer lunch break
Repeat Days 1 📩
Min. Group Size 🛛 0 🗮
Max. Group Size 0
Keep teams together
Notify participants by email

Figure 168: Example of scheduling a team for a training session

To import downloaded ICS file attendees should:

- Ensure that the exported ICS file is on a computer with Microsoft Outlook 2010 or later installed.
- Run Outlook.
- Double-click the ICS file.
- Accept the appointment to add it to the calendar.

Feature notes and caveats:

- If a meeting/training session is published then edited so that the **Notify participants by email** option is disabled, removing the session/sessions from WFM will still result in cancellation email notifications being sent to attendees.
- For training requests the option to enable the **Notify participants by email** feature is also accessible from the **Schedule Event** screen in the **Scheduling Options** tab.
- Only agent attendees are emailed notifications for meeting/training sessions. Managers and trainers will not receive email notifications.
- Attendees receiving ICS files require Microsoft Outlook 2010 or later.
- Agents need to have their email address setup in SkillsAssessor in the first instance,
 - If not then agents must have correct email addresses set in their WFM user accounts.
- Sent emails will have their 'From' field set to the manager for meetings or to the trainer for training requests. If no trainer is selected for a training request a default configurable email address will be used. Please see the installation/upgrade guide for configuring this email address.
- Email notification content will include the following information:
 - 1. Event title
 - 2. Event type
 - 3. Date & time of meeting/training session
 - 4. Location & room (if set)
 - 5. Trainer name & email
 - 6. Description & objectives
 - 7. Event public description
 - 8. Content link
- ICS files produced by Training Manager do not support recurrence rules, e.g. recurring meetings will result in multiple individual event ICS files being available in Portal.
- ICS files produced by Training Manager do not support reminders in Outlook.

19 Reports

The following reports are available in Training Manager.

19.1 Training Request Completion Report

In the **Training Events** window, information is presented in tabular and gauge format to track the number of agents that have completed the training against the requirement.

Select the individual training request from the **Sub Menu**. Clicking the training request name displays a view similar to the example below.

The gauge will give a visual representation of how near to completion the training is. The information is presented in a table format on the right-hand side.

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Completion Status													
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Training Categories													
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Booking Categories	💐 another	agent	247	Manchester		Test Training Request	TTR001	Event 1	2 Mar 2010 11:45	2 Mar 2010 12:45	Charlie Dixon		
🍰 Selection & Exclusion	Another	Agent Sharp	5026 5014	Manchester		Test Training Request	TTR001	Event 1					
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Trainers	Donna	Day	5034	Manchester		Test Training Request	TTR001	Event 1					
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	Hortense	Howard	5003	Manchester		Test Training Request	TTR001	Event 1	13 Mar 2010 12:00	13 Mar 2010 13:00	Charlie Dixon		
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	Kely	Vargas	5025	Manchester		Test Training Request	TTR001	Event 1	12 Mar 2010 12:00	12 Mar 2010 13:00	Charlie Dixon		
	Kely	Vargas Vargas	5025	Manchester		Test Training Request	TTR001	Event 1	10 Mar 2010 12:00	10 Mar 2010 12:45	Charlie Dixon		
	Lorenzo	Bratzo	6000	Manchester		Test Training Request	TTR001	Event 1	12 Mar 2010 12:00	12 Mar 2010 12:40	Charlie Dixon		
	Marlee	Masters	5023	Manchester		Test Training Request	TTR001	Event 1	12 Mar 2010 12:00	12 Mar 2010 13:00	Charlie Dixon		
	Michael	Craftsman	5031	Manchester		Test Training Request	TTR001	Event 1	10 Mar 2010 11:45	10 Mar 2010 12:45	Charlie Dixon		
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Figure 169: Training request completion status

19.2 Training Summary by Status Report

An overall summary report is available, by status, for each of the training requests.

When you click the actual status— for example, **Active** or **Completed**—a summary appears for each of the training requests within that file, similar to the example below.



Figure 170: Summary of training requests

19.3 Agent Detail Completion Report by Training Event

A Completion Status report for the training event is available that lists all of the agents assigned to attend training.

This report is available by selecting **Completion Status** found underneath **Training Requests** in the **Main Menu** window.

Select the relevant status, and then expand the view to locate the relevant training request in the **Sub Menu**. Selecting the last option displays a list of all of the agents that were selected for training. This view can also be filtered by either clicking at the top of the column heading, and/or using the available filters; for example, **Enable Status Filter**, or **Enable Date Filter**.

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Manager Calendars															
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		another	agent	247	Manchester	London MU	Test Training Request	TTR001	Event 1	2 Mar 2010 11:45	2 Mar 2010 12:45	Charlie Dixon			
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Figure 171: Completion status report

19.4 Completion Status Report

Report information can now be viewed at a higher level than selecting the individual training request.

Select the **Completion Status** option on the **Main Menu**. The report template appears in the main window. The option to filter by the following options is then available:

- 1. Status of training session; for example, **Pending Approval** or **Active**.
- 2. Course Code
- 3. Date
- 4. Training status; for example, **Missed** or **Scheduled**.

The information can be filtered further by the **Location**, **Team**, **Site** and **Business Unit** as usual.

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Figure 172: Completion status report

19.5 Individual Agent Training Summary Report

This reports individual agent activity across all of their scheduled training.

Expand **Selection & Exclusion** in the **Main Menu** window and then expand the MU's and Agent Groups to select the required individual. Right click on the individual and select **Completion Status**.

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Figure 173: Individual agent training summary report

This will reveal any training activity within the date range. The list could contain sessions that the individual was scheduled for or training that the individual was selected but not scheduled.



Figure 174: Individual agent training summary report

19.6 Training Overview Report

This report is available by expanding **Training Requests** in the **Main Menu** and selecting **Reports**.

Select the required report from the **Report** drop-down menu. Change the date range in the **Start Date** and **End Date** fields if required, and then click **Refresh**.

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Figure 175: Training overview report

Any training activity in the selected date range will then be displayed.

This information can also be exported by clicking the Export button.	This information can also	be exported by	y clicking the Expo	' t button.
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	🗐 Gregory	Parsons	5002	Manchester	London MU	Test Training Request	TTR001	Event 1	5 Mar 2010 12:00	5 Mar 2010 13:00	Charlie Dixo
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🦇 SkillsAssess	💐 Joe	Default	235	Manchester		Test Training Request	TTR001	Event 1	2 Mar 2010 11:45	2 Mar 2010 12:45	Charlie Dixo
	Joe	DePlummer	232	Manchester		Test Training Request	TTR001	Event 1	2 Mar 2010 11:45	2 Mar 2010 12:45	Charlie Dixo
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	🗐 Milie	Wiseman	5018	Manchester		Test Training Request	TTR001	Event 1	10 Mar 2010 11:45	10 Mar 2010 12:45	Charlie Dixo
	Monica	Moore	5029	Manchester		Test Training Request	TTR001	Event 1	12 Mar 2010 12:00	12 Mar 2010 13:00	Charlie Dixe
	🗐 Pam	Soltani	2030	Manchester		Test Training Request	TTR001	Event 1	2 Mar 2010 11:45	2 Mar 2010 12:45	Charlie Dixo
	🗐 Baymond	Steele	5004	Manchester	London MU	Test Training Request	TTR001	Event 1	5 Mar 2010 12:00	5 Mar 2010 13:00	Charlie Dixo
	🗐 Ricki	Glover	5021	Manchester	London MU	Test Training Request	TTR001	Event 1	10 Mar 2010 11:45	10 Mar 2010 12:45	Charlie Dixo
	💐 Ricki	Glover	5009	Manchester	London MU	Test Training Request	TTR001	Event 1	5 Mar 2010 12:00	5 Mar 2010 13:00	Charlie Dixo
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Figure 176: Exporting a training overview report

19.7 Multiple Trainer Courses Report

This report is selected in exactly the same way as the Training Overview, and will display any training activity where there have been multiple trainers in the required date range.

This information can be exported if required.

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a 📲 🖁 Resource Calendars														
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Figure 177: Viewing and exporting the multiple trainer courses report

20 Useful Tips

When scheduling for a full day's training session there are no schedules created.	Check in Scheduler to make sure that breaks and lunches have been selected as interruptible.
No schedules have been created for certain agents even though they are in WFM.	Check in WFM to make sure that they are available. For example, that they have a schedule and are not on vacation or scheduled to do something else.
No schedules have been created even though the agents are available in WFM.	Check to make sure that the trainer(s) and the room(s) selected are available for the training window specified.
A trainer has been selected, but is only being scheduled from 11:00 and I need to schedule them from 08:00.	Check to make sure that their previous shift ends at the correct time and not 00:00 (midnight) per the 11-hours-between-working-shifts rule.
Overtime has been created to increase the number of agents available for training, but they aren't being scheduled.	Check in Scheduler to make sure that the overtime activity has been selected as interruptible.
Training Overview report is only exported into csv.	To view an exported Training Overview report in Excel, export it and save it as a csv file. Open Excel, and then open the csv document as "delimiter." This transfers the file into Excel.
One of the rooms previously used is now unavailable.	Select the room from within the Resources main menu option and deactivate it to make sure that it is not used in the future.

Useful Tips