GENESYS™

Training Manager Web Portal 8.5.648

Agent User Guide

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1 Preface

Welcome to the *Genesys Training Manager Web Portal Agent User Guide.* This guide is designed to explain the application in user-friendly terms and walk you through how to navigate the system.

The Portal provides access to view any training, 1-2-1's or meetings that have been scheduled for the agent. This could include the trainer and room and will provide a reason for why the training has been scheduled.

2 Web Portal Agent

2.1 The Agent

When the agent logs on to the system the first time, he or she will be presented with a screen to select their time zone.

Use the drop down box to select the correct time zone and then click on **Continue**.

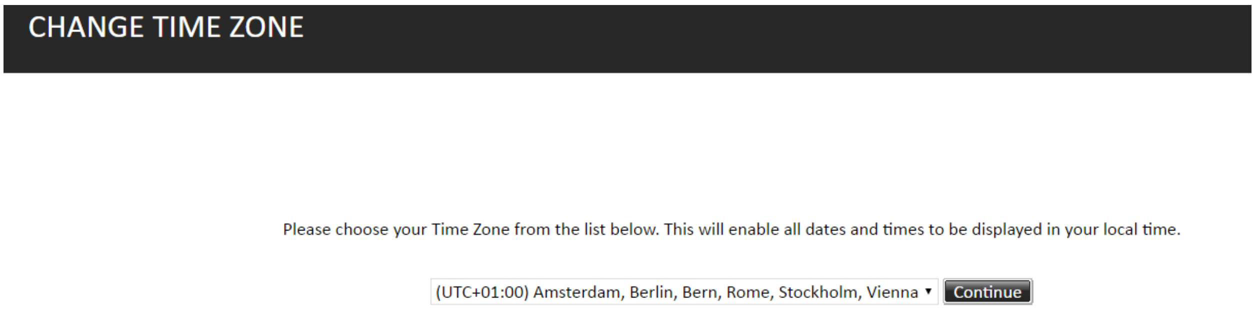

Figure 1: Setting your time zone

The agent has access to:

- **agent calendar**
- **training roadmap**
- **Change Time Zone**

Details of any training sessions will only be visible in the portal if the advisor has scheduled training in Training Manager and this has been approved.

The option to log out is available from the bottom of the menu.

3 My Options

3.1 Agent Calendar

Clicking **agent calendar** menu item will reveal any scheduled training activity. The date range can be altered by using the date filter.

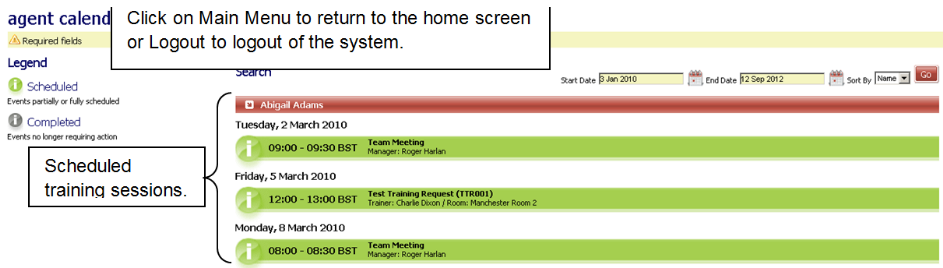

Figure 2: Agent calendar

Clicking one of the training session bars will reveal the details of the session—for example, the trainer, the location of the room, and any additional notes about the session.

If there is a link to e-learning content, click the link to go directly to the content.

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

Click **Main Menu** to return to the home page at any time.

Figure 3: Viewing training session detail

After a classroom training session has been completed, each individual's attendance record will be updated by the trainer with the information appearing under **Attendance** and **Completion**.

E-learning attendance may also be updated and visible against the scheduled e-learning activity.

3.2 Training Roadmap

The training roadmap is displayed in the right pane of the home page, and the latest training activity is visible in the **training roadmap** pane.

Click **View the full Training Roadmap** to view all of the training sessions currently scheduled in Training Manager.

The training roadmap is color-coded, based on the status of the training session:

- **Unscheduled –** The training is in the process of being scheduled but is not currently live.
- **Scheduled** – The training request is live.
- **Completed** – The training request has finished.

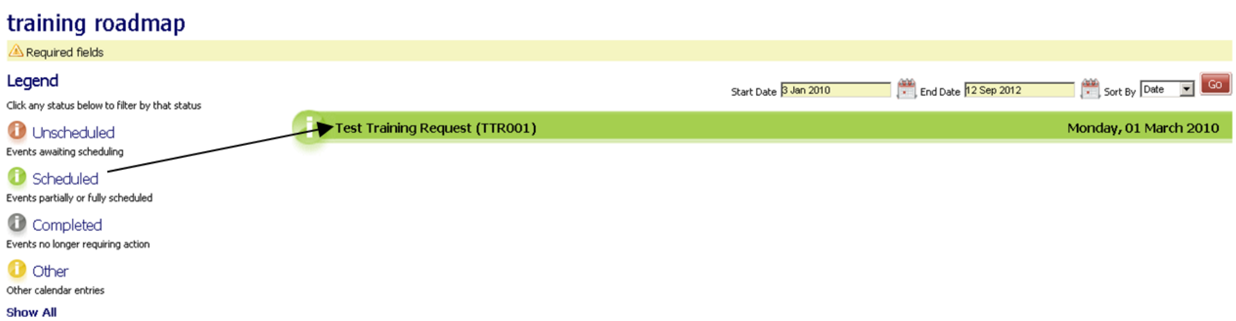

Figure 4: Training roadmap

Click one of the training session bars to reveal any additional details—for example, objectives, additional notes.

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

training roadmap

Figure 5: Viewing session details and sorting sessions