



Genesys Training Manager 8.0

Administrator Guide

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Each product has its own documentation for online viewing at the Genesys Technical Support website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

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Chapter

1 Preface

Welcome to the *Genesys Training Manager 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 WorkForce Management (WFM).

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

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

Note:	For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com .
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For information about related resources and about the conventions that are used in this document, see the supplementary material starting on [page 9](#).

About Genesys Training Manager

Genesys Training Manager enables companies to create, manage, and schedule multiple agent training activity, team meetings, and one-to-ones automatically in Genesys WorkForce Management (WFM). The training scheduling process can include rooms and trainers or any combination of agent, room, and training. 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, and if there were any non-attendees these can be "mopped-up" automatically as part of the scheduling process.

Intended Audience

This document is primarily intended for system administrators or other individuals who install the Genesys Training Manager.

Making Comments on This Document

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

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

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

Contacting Genesys Technical Support

If you have purchased support directly from Genesys, contact Genesys Technical Support at the following regional numbers:

Region	Telephone	E-Mail
North America and Latin America	+888-369-5555 (toll-free) +506-674-6767	support@genesyslab.com
Europe, Middle East, and Africa	+44-(0)-1276-45-7002	support@genesyslab.co.uk
Asia Pacific	+61-7-3368-6868 (International)	support@genesyslab.com.au
Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868 (International)	support@genesyslab.com.au
India	1-800-407-436379 (toll-free) +61-7-3368-6868 (International)	support@genesyslab.com.au
Japan	+81-3-6361-8950	support@genesyslab.co.jp
Before contacting technical support, refer to the <i>Genesys Technical Support Guide</i> for complete contact information and procedures.		

Related Documentation Resources

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

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

Genesys

Consult these additional resources as necessary:

- The *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library CD and which provides a comprehensive list of the Genesys and CTI terminology and acronyms used in this document.
- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at <http://genesyslab.com/support>.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *[Genesys Supported Operating Environment Reference Manual](#)*
- *[Genesys Supported Media Interfaces Reference Manual](#)*

Genesys product documentation is available on the:

- Genesys Technical Support website at <http://genesyslab.com/support>.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

Document Conventions

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

Document Version Number

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

42gp_icg_aspect-wfm_08-2010_v4.2.001.01

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

Screen Captures Used in This Document

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

Type Styles

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

Type Styles

Type Style	Used For	Examples
Italic	<ul style="list-style-type: none">Document titlesEmphasisDefinitions of (or first references to) unfamiliar termsMathematical variables Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets below).	<p>Please consult the <i>Genesys Migration Guide</i> for more information.</p> <p>Do <i>not</i> use this value for this option.</p> <p>A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession.</p> <p>The formula, $x + 1 = 7$ where x stands for . . .</p>
Monospace font (Looks like teletype or typewriter text)	<p>All programming identifiers and GUI elements. This convention includes:</p> <ul style="list-style-type: none">The <i>names</i> of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages.The values of options.Logical arguments and command syntax.Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.	<p>Select the Show variables on screen check box.</p> <p>In the Operand text box, enter your formula.</p> <p>Click OK to exit the Properties dialog box.</p> <p>T-Server distributes the error messages in EventError events.</p> <p>If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls.</p> <p>Enter exit on the command line.</p>

Angle brackets (<>)	<p>A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise.</p> <p>Note: In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.</p>	<pre>smcp_server -host <confighost></pre>
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Chapter

2 Genesys Training Manager Administrator

Genesys Training Manager

Logging On

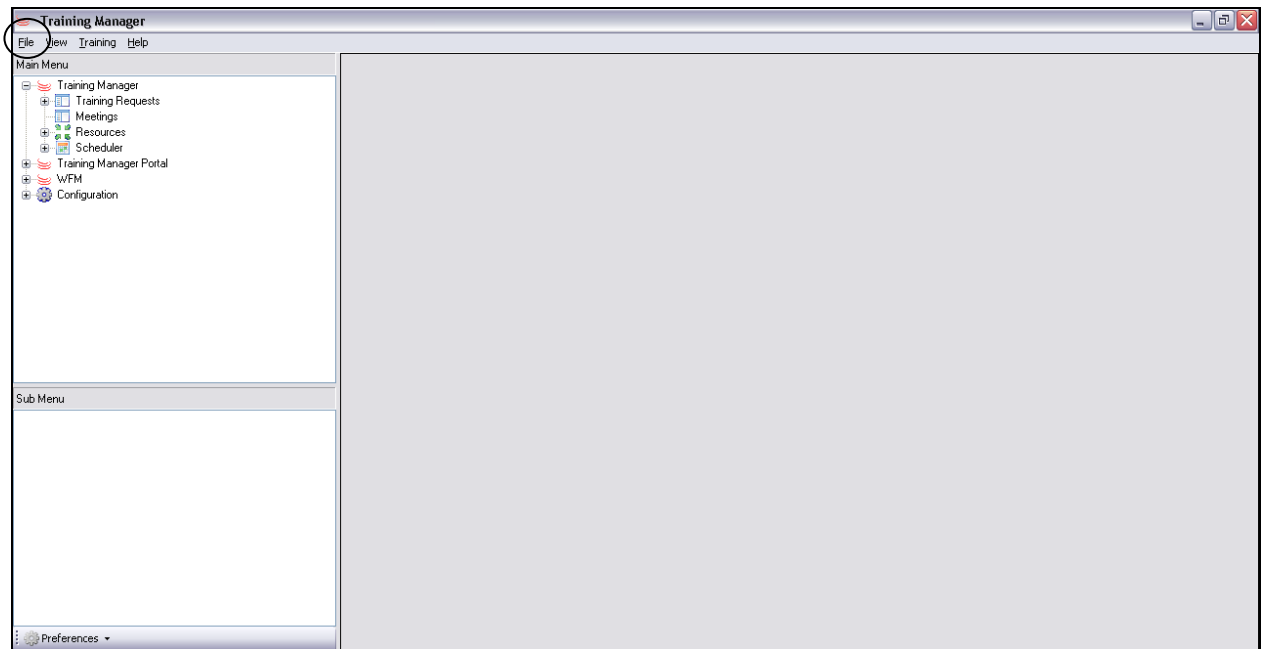
Providing the User has authority to access the application, the Log In screen will then be presented as follows:-



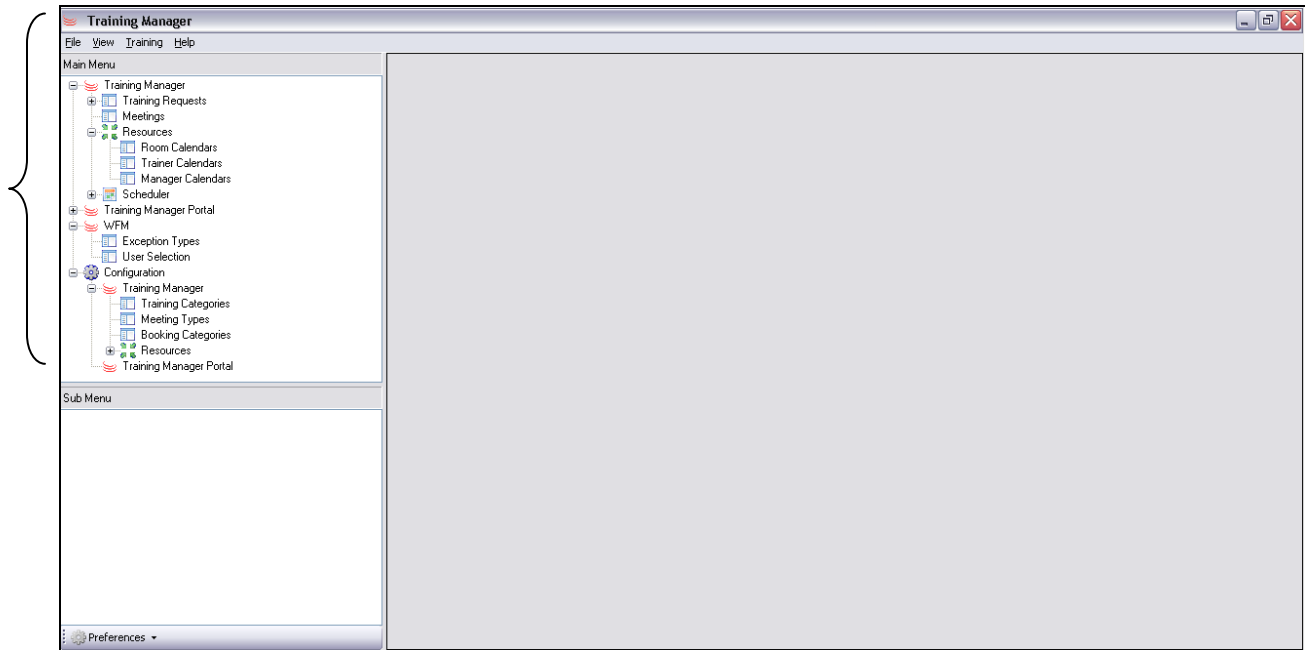
Complete the details as required and select OK.

Logging Off

To log out of the application click on 'File' and then 'Exit'.



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



Genesys Training Manager Components Overview

Genesys Training Manager has several key components with a further component available if there is integration into the SkillsAssessor module:

1. Training Requests – as the name implies this is the menu option to create a ‘Training Request’.
 - Completion Status / Reports
 - Meetings – this is the menu option to select to create and schedule any meetings / One to Ones where the team manager is also required.
2. 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 per 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 Genesys Training Manager to schedule their team meetings. Managers keep their working hours and unavailability up to date through their web portal access.
3. Scheduler – exclude users and dates from any scheduled training or meeting activity.
4. Training Manager Portal – this is where the web portal access is managed. Administrators are created here. Trainer Managers, Trainers, Managers and agents are created automatically, however Trainer Managers, Trainers and Managers have to be granted access to the web portal.

5. WFM – this is where exceptions can be viewed directly out of WFM and where teams are associated to Managers and Locations.
6. Configuration -
 - Training Categories – the different categories used in training activity for example, Trainer Led
 - Meeting Types - the different types of meetings associated to the specific meeting algorithm, for example, One to One, TeamMeeting
 - Booking Categories – distinguish the type of category in the web portal, for example, Holidays. They are also color coded for easy visibility.
 - Resources – Locations, Trainers and Rooms are created configured and managed here.
7. Training Manager Portal – Authentication, Branding and visibility of training schedules in the web portal is managed here.

These components are covered in detail in the document.

Configuring Genesys Training Manager

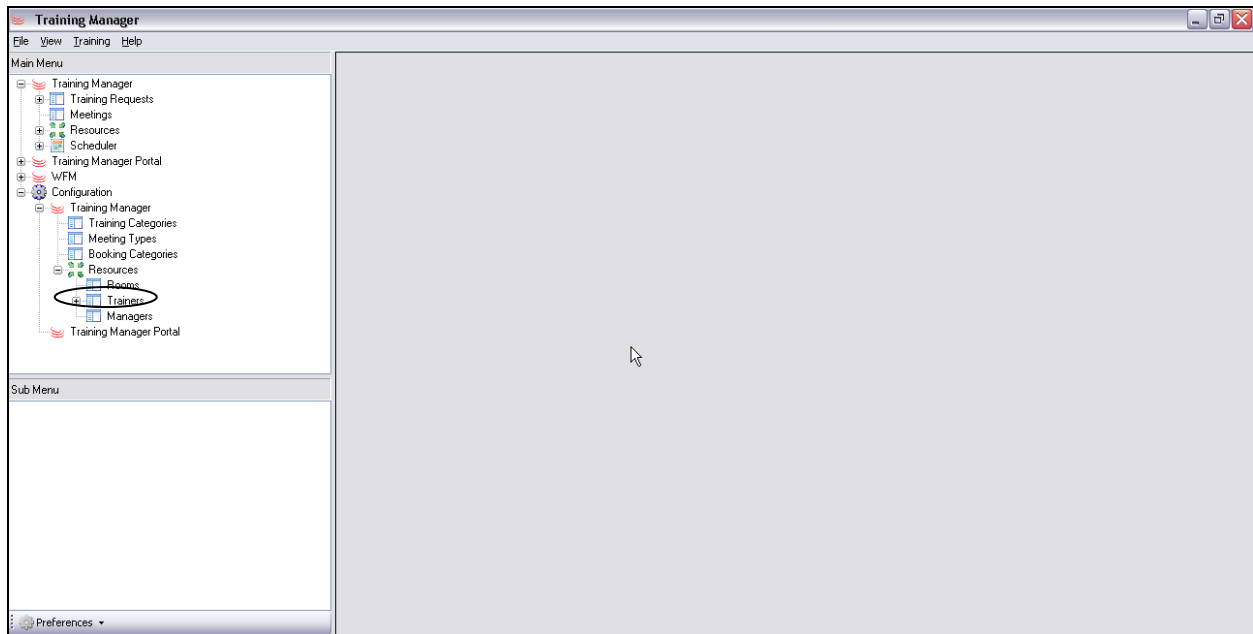
Due to the integration into WFM the following information will already be available to select through Genesys Training Manager:-

- Sites or Business Units
- Agents, Agent Groups, Scheduling Pots, Skills (including proficiency levels) and Activities
- Agent WFM schedules

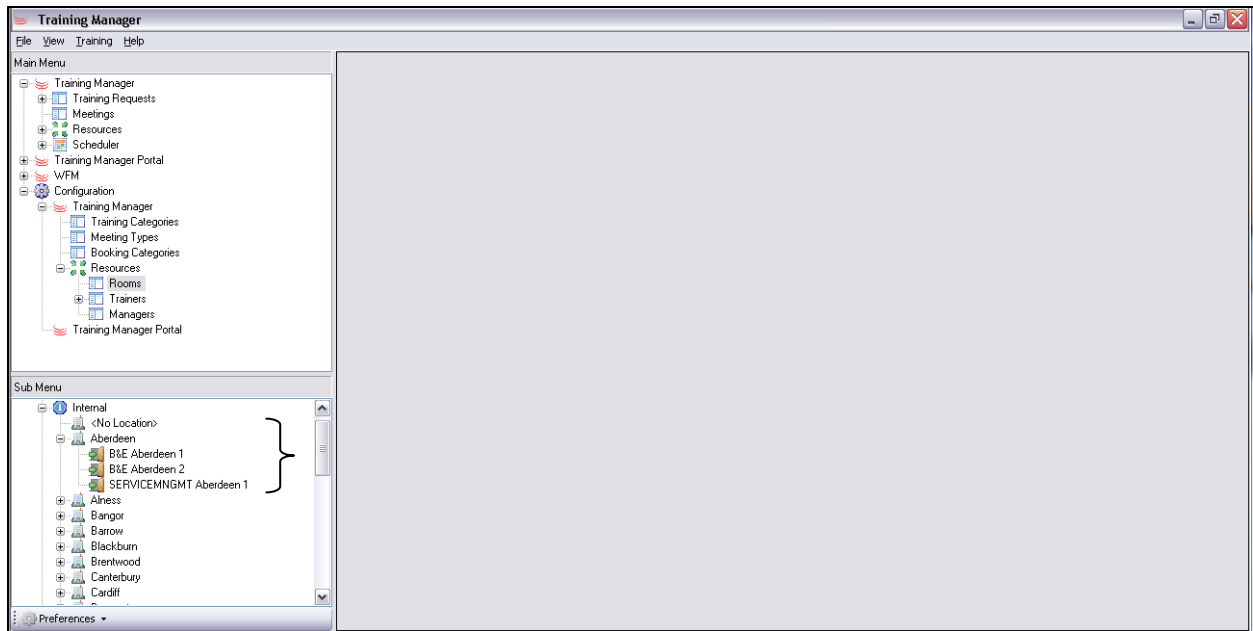
Creating Locations

Genesys Training Manager has to be configured to identify which location Agents, Trainers and Rooms are associated to for scheduling training activity. Therefore the locations first need to exist in Genesys Training Manager.

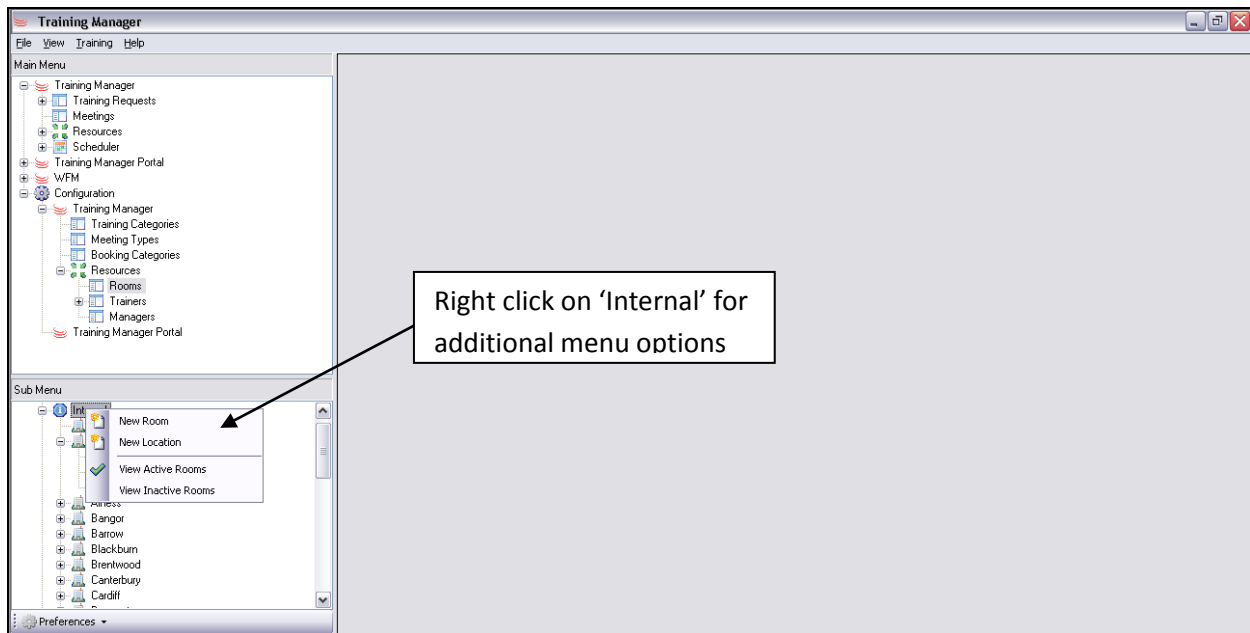
To create a new location, select 'Configuration'/ Genesys Training Manager/ Resources and then click on 'Rooms'.



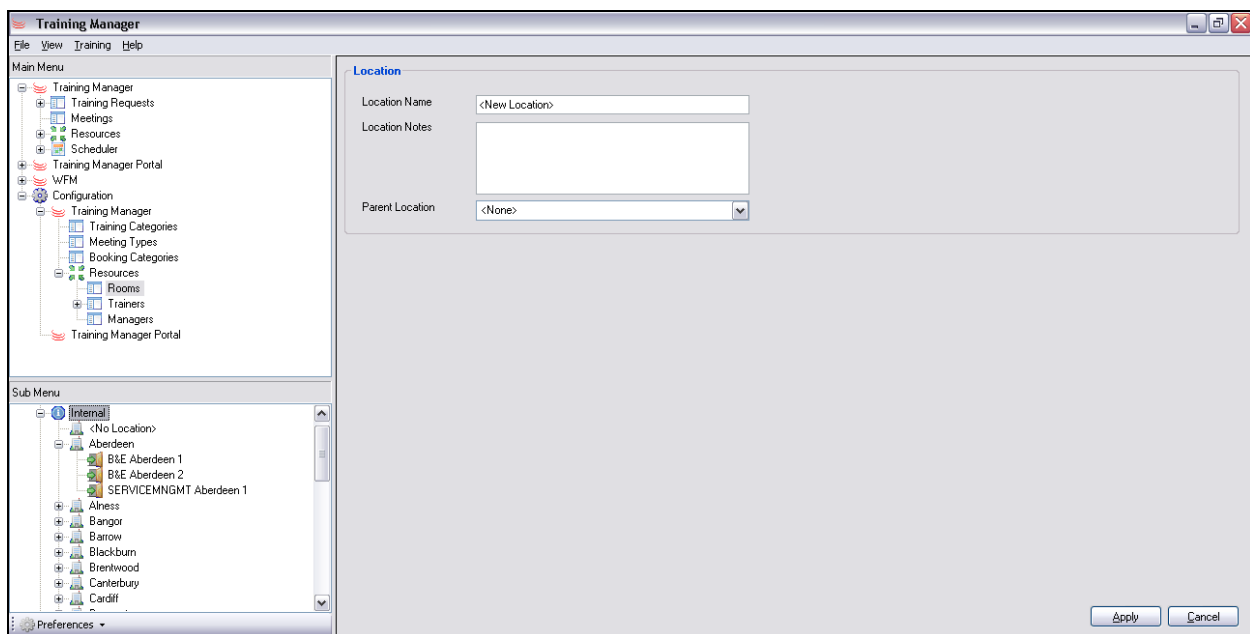
By expanding the 'Internal' sub menu, this displays a list of the internal sites. Expand the site to reveal any Rooms associated.



To create a new location, right click on 'Internal' in the sub menu and additional options will appear.



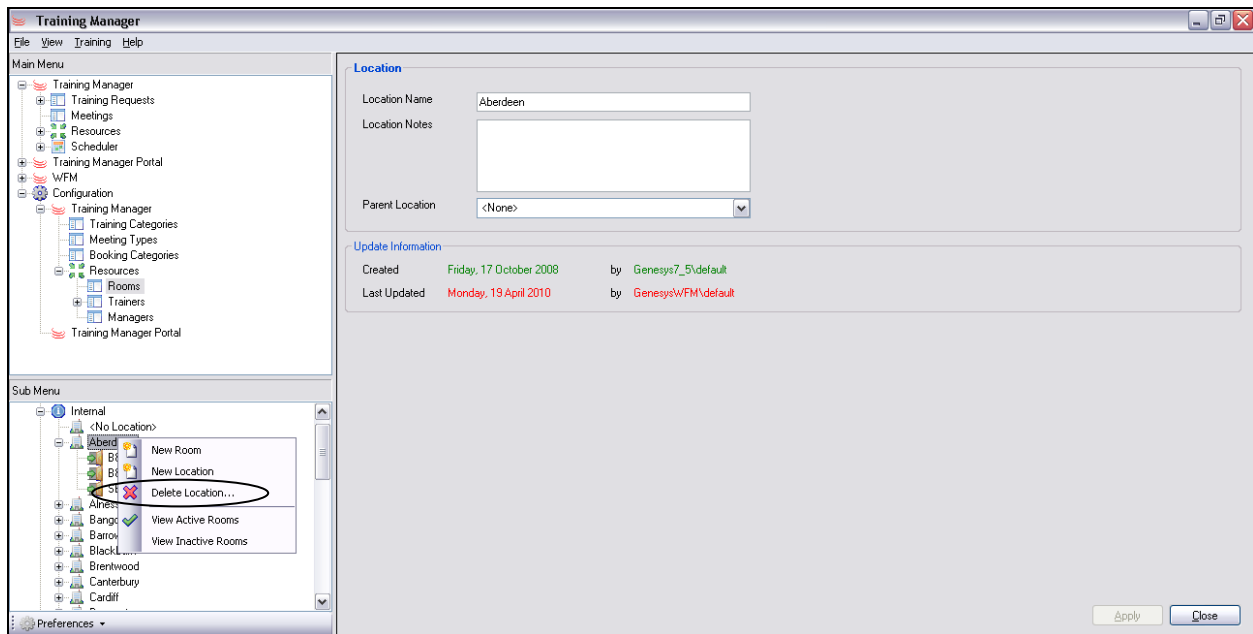
Select 'New Location' and complete the details as required. If the location is a satellite site select the 'Parent Location' from the pull down box. Once the location has been created then Rooms, Trainers and Agent Teams can be associated.



Deleting Locations

To delete a location, select the location from the Rooms sub menu and then right click on the location and select 'Delete Location'.

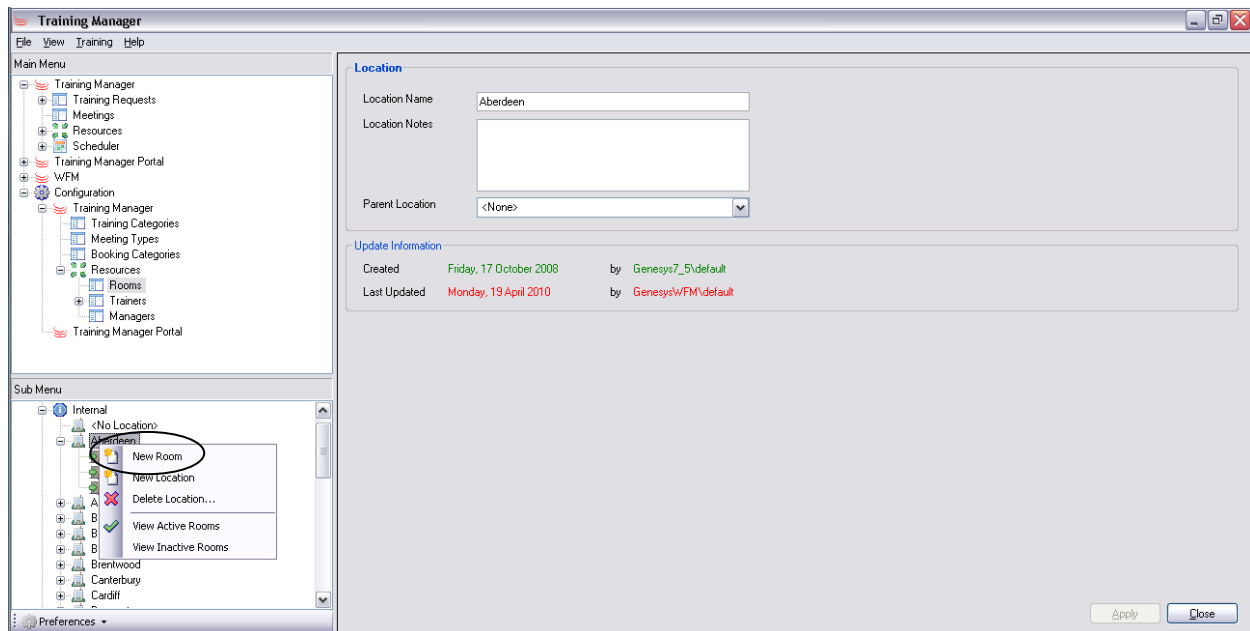
Note: A location can only be deleted if there is no activity associated to it.



Creating Rooms

Rooms are also created under the 'Resources' option similar to creating locations.

Select 'New Room' from the options presented and this will then associate the new room to the location.



After selecting 'New Room', the following template appears.

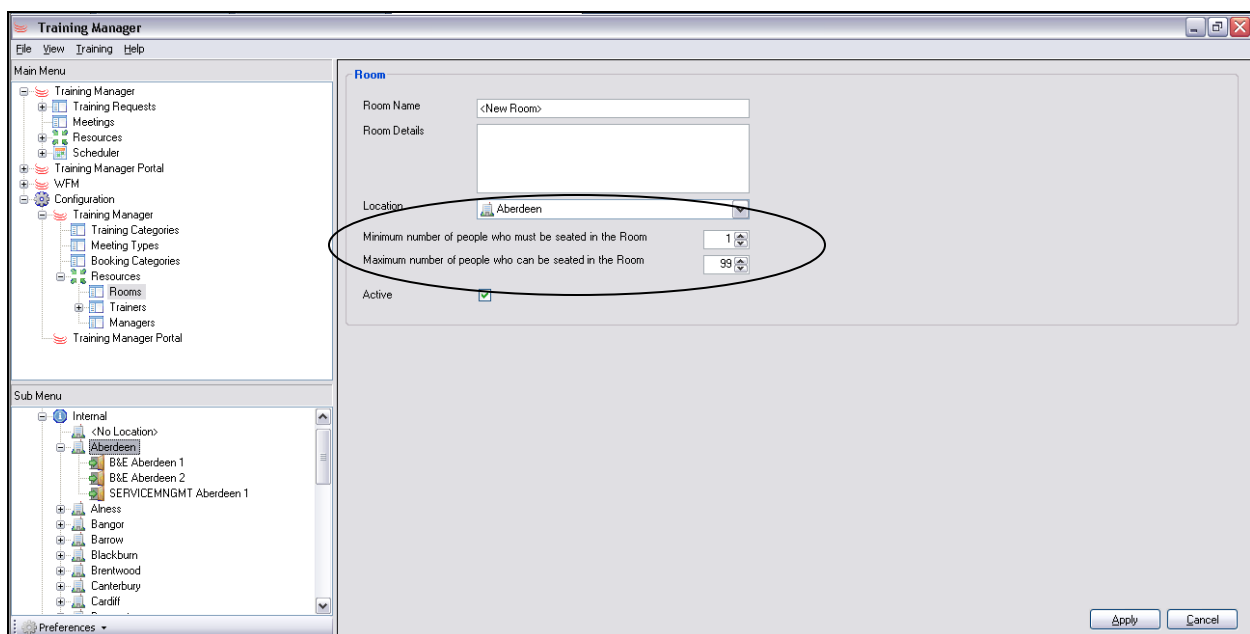
Enter a relevant room name (by including the location as part of the room name this will identify where the training is taking place) and any other necessary details.

Select the 'Location' of the room from the drop down box (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 1 and manage the training group size as part of the scheduling process.

If the room becomes unavailable for scheduling then deselect 'Active'. The room will then not appear as available when selecting rooms to schedule training into.

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

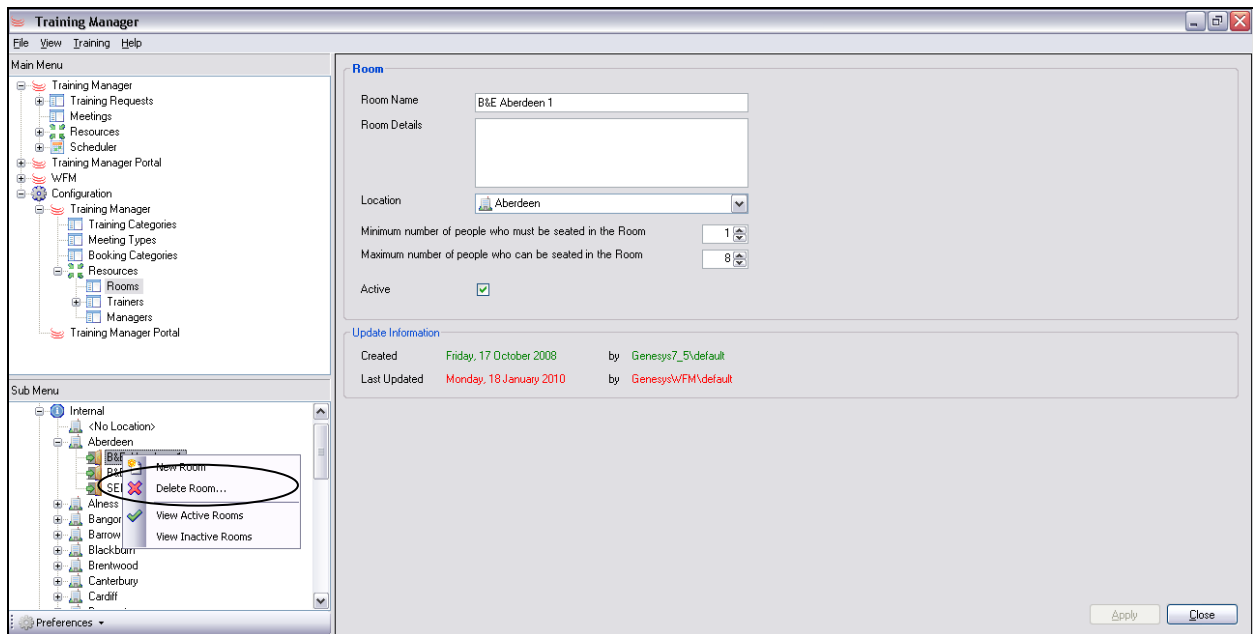


Deleting Rooms

To delete a room expand the location and select the required room to delete. Right click on the room and select 'Delete Room' as per the example below.

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

There is however the option to make the room inactive and therefore remove it from the list of available rooms. Deselect 'Active' which will then make the room inactive.

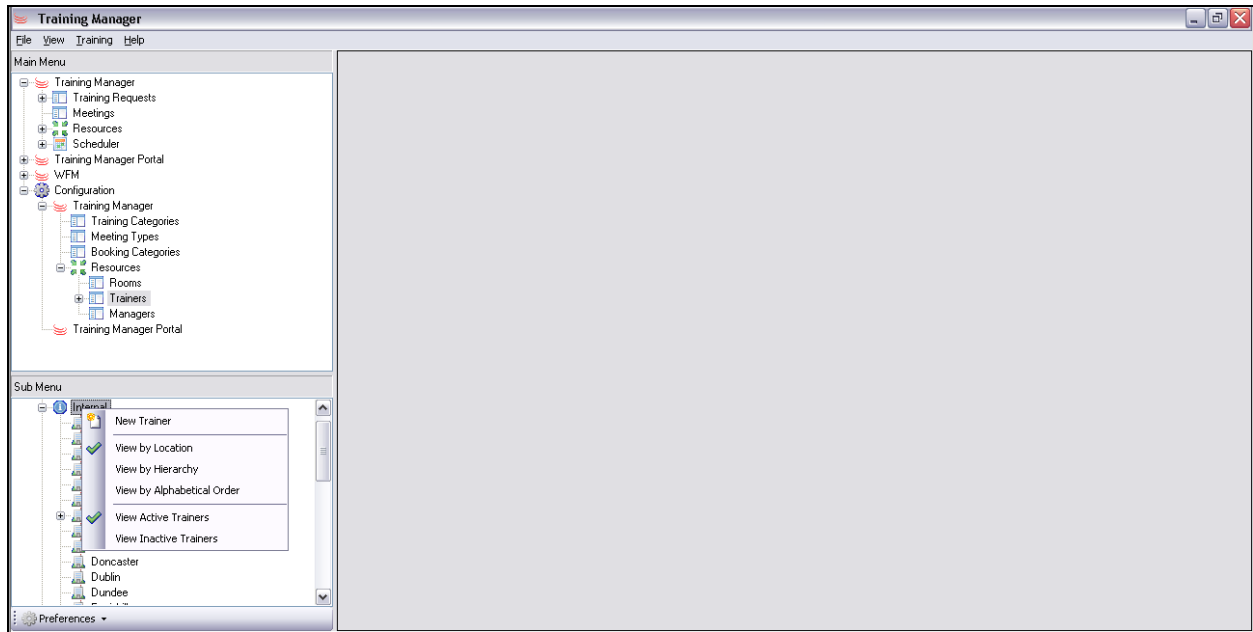


Creating Trainers

Trainers are created and managed under the Configuration / Genesys Training Manager / Resources option.

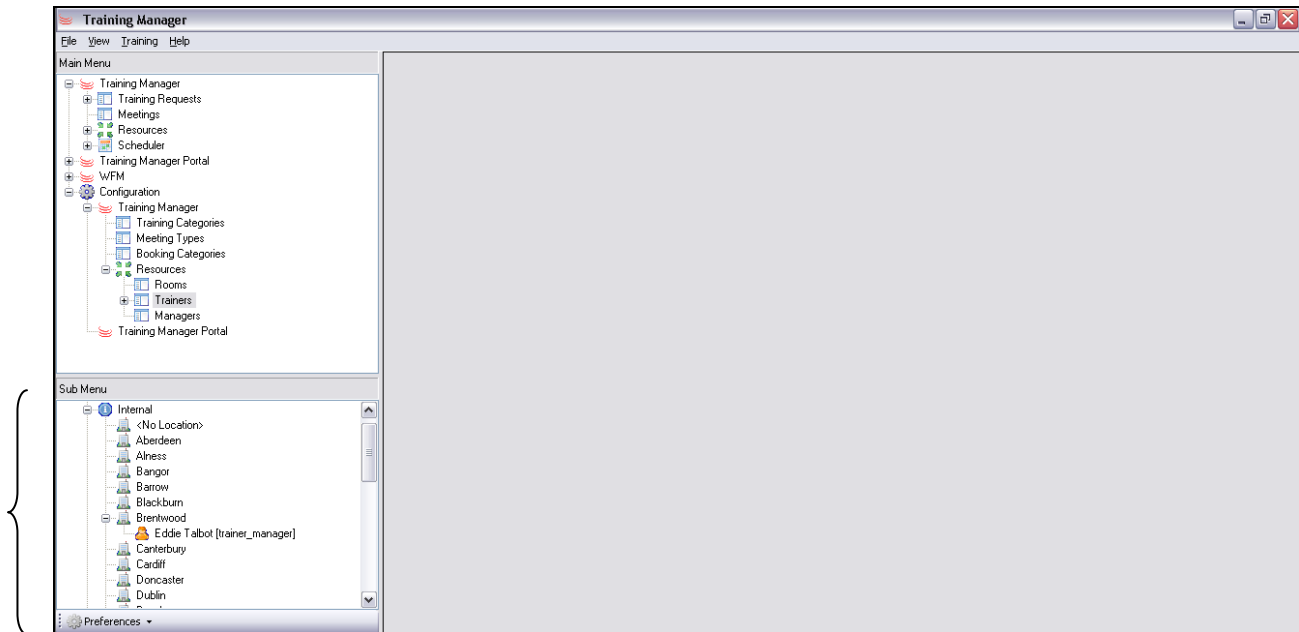
Select 'Trainers' and the tree view will appear in the Sub Menu.

Right click on Internal to view any configured Internal trainers

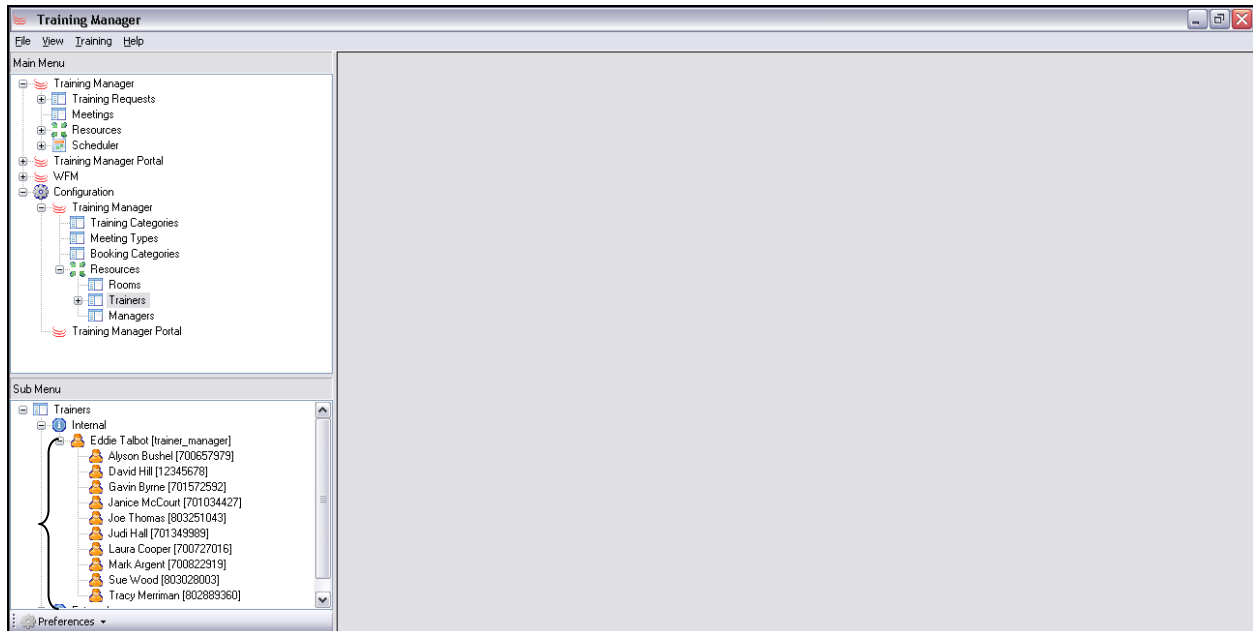


There are three ways to view the trainer structure and by right clicking on 'Internal' in the sub menu the following options are available:

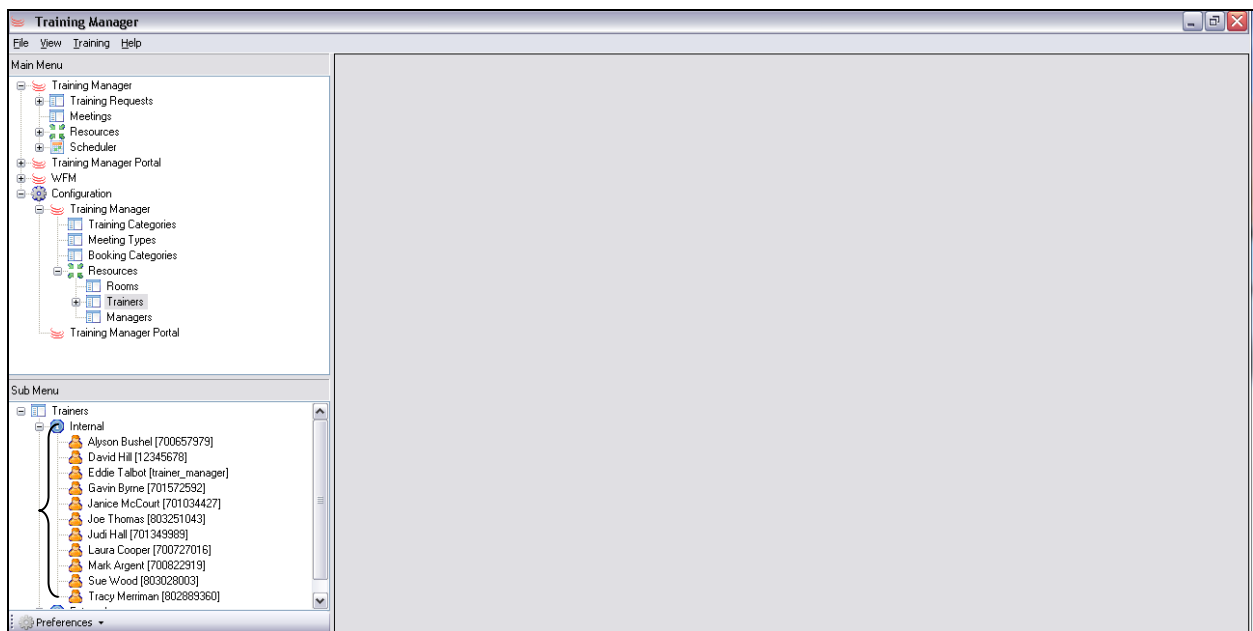
1. View by Location - this lists all of the locations in the Sub Menu and expanding the location reveals the associated trainers.



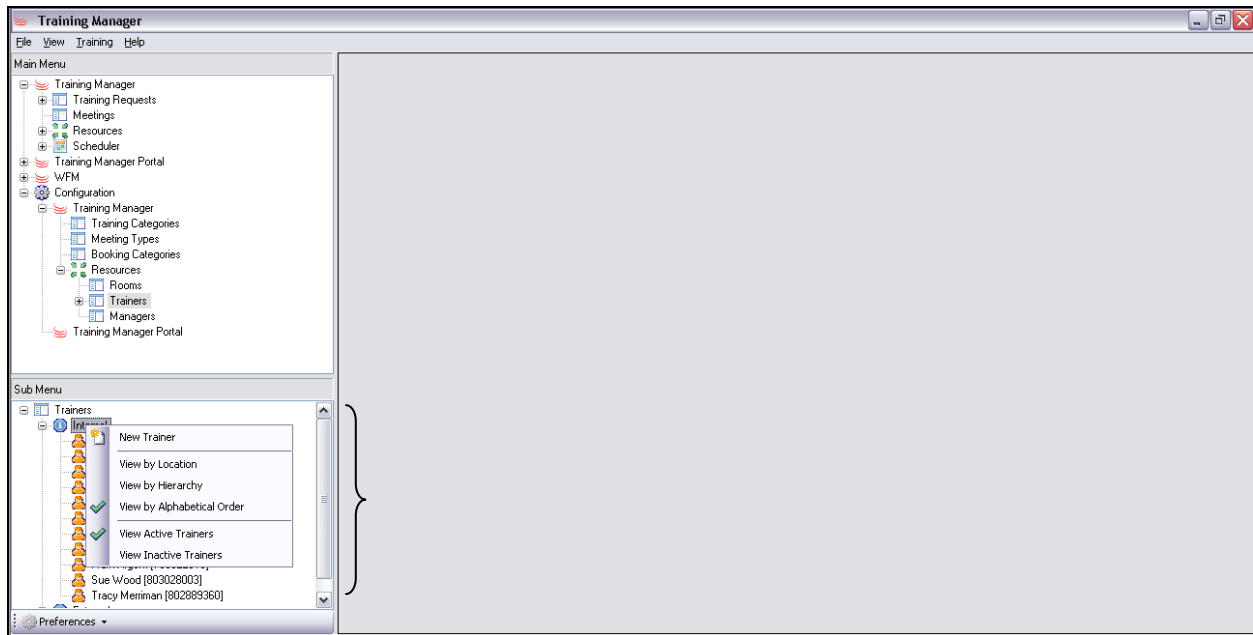
2. View by Hierarchy –This lists the trainer manager and their associated trainers (creating the trainers hierarchy will be covered later in the document).



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



A new trainer can be created by either right clicking on the location, or by right clicking on 'Internal' and the option to create a 'New Trainer' will then appear.



Select 'New Trainer' and the following template will appear.

Training Manager

File View Training Help

Main Menu

- Training Manager
- Training Requests
- Meetings
- Resources
- Scheduler
- Training Manager Portal
- WFM
- Configuration
 - Training Manager
 - Training Categories
 - Meeting Types
 - Booking Categories
 - Resources
 - Rooms
 - Trainers**
 - Managers
- Training Manager Portal

Sub Menu

- Trainers
 - Internal**
 - Alyson Bushell [700657979]
 - David Hill [12345678]
 - Eddie Talbot [trainer_manager]
 - Gavin Byrne [701572532]
 - Janice McColatt [701034427]
 - Joe Thomas [803251043]
 - Judi Hall [70134988]
 - Laura Cooper [700727016]
 - Mark Argent [700822919]
 - Sue Wood [803028003]
 - Tracy Meriman [802893360]

Preferences

Trainer

First Name: <New Trainer>

Last Name:

Employee ID:

Trainer Details:

Manager: <None>

Active: ☒

Working Hours | Working Rules | Locations | Skills

	Working Hours		Lunch	
	Start	End	Earliest	Latest
Mon	00:00	00:00	00:00	00:00
Tue	00:00	00:00	00:00	00:00
Wed	00:00	00:00	00:00	00:00
Thu	00:00	00:00	00:00	00:00
Fri	00:00	00:00	00:00	00:00
Sat	00:00	00:00	00:00	00:00
Sun	00:00	00:00	00:00	00:00

Apply Cancel

Enter the details as required and if the trainer is external, then 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 to individual Trainers.

Working Hours

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

Working Hours:

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

End – this is the latest time the trainer can finish work.

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.

Training Manager

File View Training Help

Main Menu

- Training Manager
 - Training Requests
 - Meetings
 - Resources
 - Scheduler
 - Training Manager Portal
 - WFM
 - Configuration
 - Training Manager
 - Training Categories
 - Meeting Types
 - Booking Categories
 - Resources
 - Rooms
 - Trainers
 - Managers
 - Training Manager Portal

Sub Menu

- Trainers
 - Internal
 - Alyson Bushel [700657979]
 - David Hill [12345678]
 - Eddie Talbot [trainer_manager]
 - Gavin Byrne [701572532]
 - Janice McCourt [701034427]
 - Joe Thomas [803251043]
 - Judi Hall [701349989]
 - Laura Cooper [700727016]
 - Mark Argent [700622919]
 - Sue Wood [803028003]
 - Tracy Meriman [802893360]

Preferences

Trainer

First Name: Alyson

Last Name: Bushel

Employee ID: 700657979

Trainer Details:

Manager: Eddie Talbot [trainer_manager]

Active: ☒

Working Hours | Working Rules | Locations | Skills

	Working Hours		Lunch	
	Start	End	Earliest	Latest
Mon	08:00	22:00	11:00	17:30
Tue	08:00	22:00	11:00	17:30
Wed	08:00	22:00	11:00	17:30
Thu	08:00	22:00	11:00	17:30
Fri	08:00	22:00	11:00	17:30
Sat	08:00	13:00	00:00	00:00
Sun	00:00	00:00	11:00	14:30

Update Information

Created: 1 August 2009 by: Genesys2_Edinburgh

Working Rules

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

Maximum Hours Per Week – this is the maximum number of hours the trainer can work per week.

Minimum hours between Working Days – this is 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.

The screenshot shows the 'Training Manager' application window. On the left is a tree view with 'Main Menu' and 'Sub Menu' sections. The 'Main Menu' includes Training Manager, Training Requests, Meetings, Resources, Scheduler, Training Manager Portal, WFM, Configuration, and Training Manager. The 'Sub Menu' includes Trainers, Internal, and a list of trainers with their IDs. The main area is titled 'Trainer' and contains a form for configuring a trainer. The form has fields for First Name (Alyson), Last Name (Bushel), Employee ID (700657379), Manager (Eddie Talbot), and Active status (checked). Below these is a tabbed interface with 'Working Hours', 'Working Rules', 'Locations', and 'Skills' tabs. The 'Working Rules' tab is selected, showing settings for Maximum Hours Per Day (8), Maximum Hours Per Week (80), Minimum Hours between Working Days (10), Minimum required Lunch Break in the Working Day (30), and Total minutes for all Breaks in the Working Day (60). At the bottom, there is an 'Update Information' button and a status bar showing 'Created: Friday, 1 August 2008 by: Gwyneth Eldred'. A 'Preferences' button is visible in the bottom left corner.

Locations

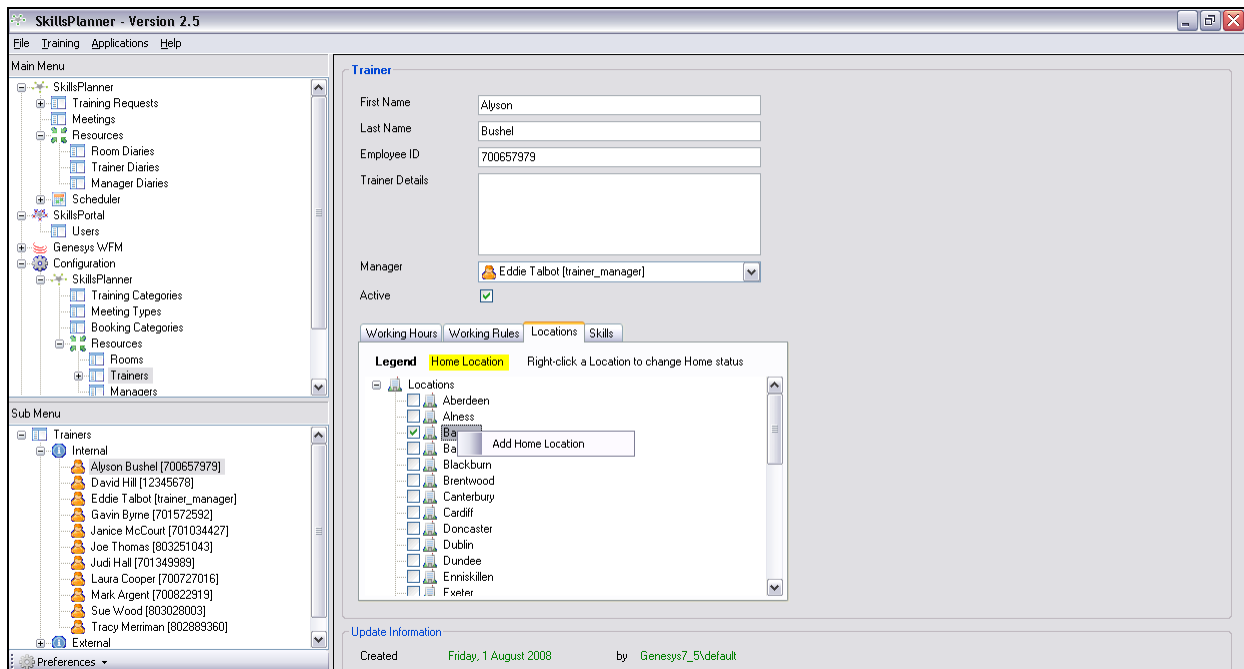
This is the third tab which needs to be completed as part of configuring a new trainer.

This identifies the location(s) where the trainer can deliver training and more than one location can be selected.

When 'Location' is selected the list of locations in the application appears. Select the relevant location and click in the box at the left hand side of the location name. Do the same for each of the locations where the trainer can deliver training. The trainers home location needs to be clearly identified as Genesys Training Manager will always prioritise training to trainers at their Home Location

To set a location as a 'Home Location', click on the icon to the left of the location name and then right click for the 'Add Home Location' option.

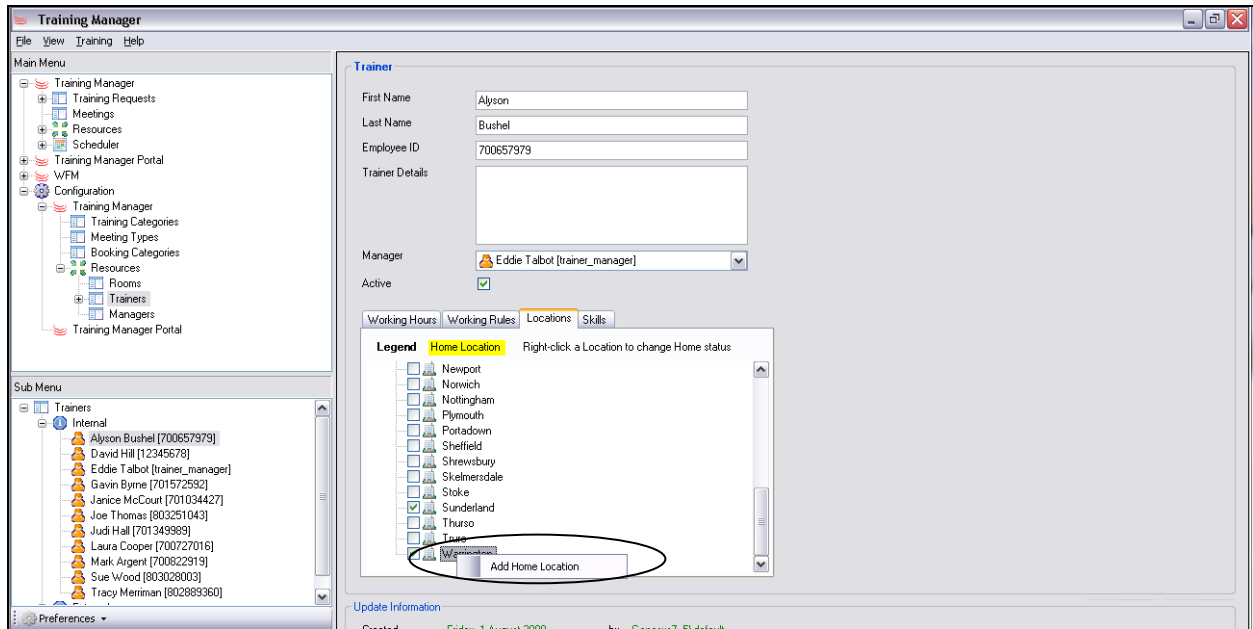
Once 'Add Home Location' has been selected the location will have a yellow box around it.



Remove the Home Location

The option to remove the current 'Home Location' is available by right clicking on the location and selecting 'Remove as Home Location'.

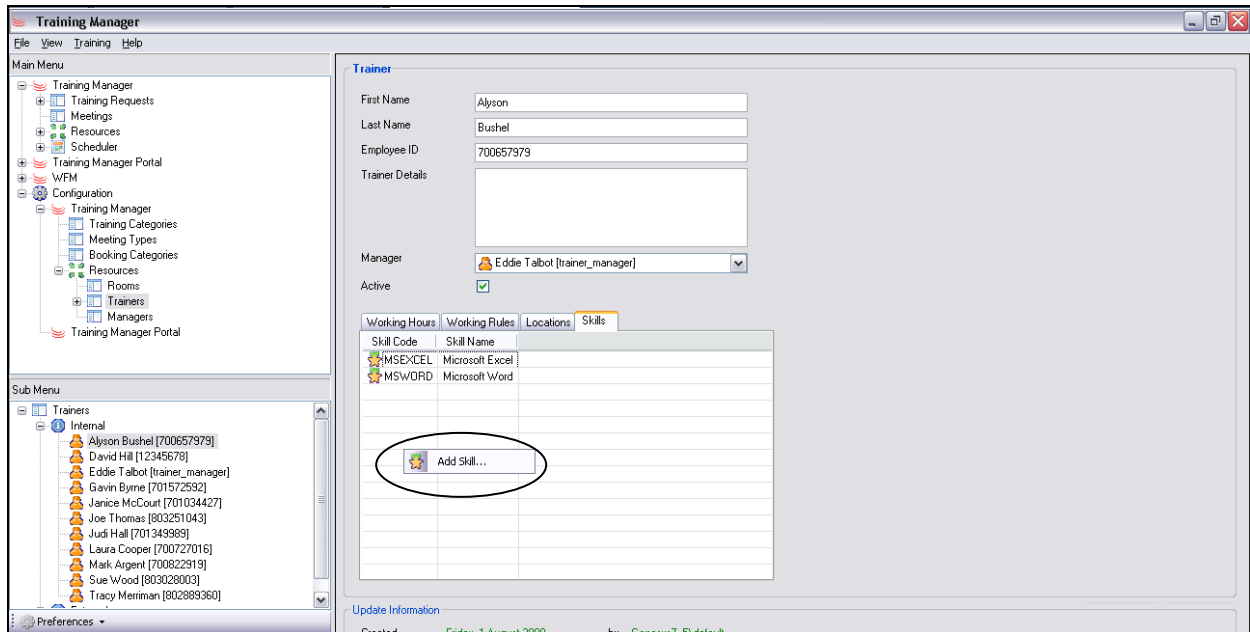
The option is then available to select a different home location for the trainer.



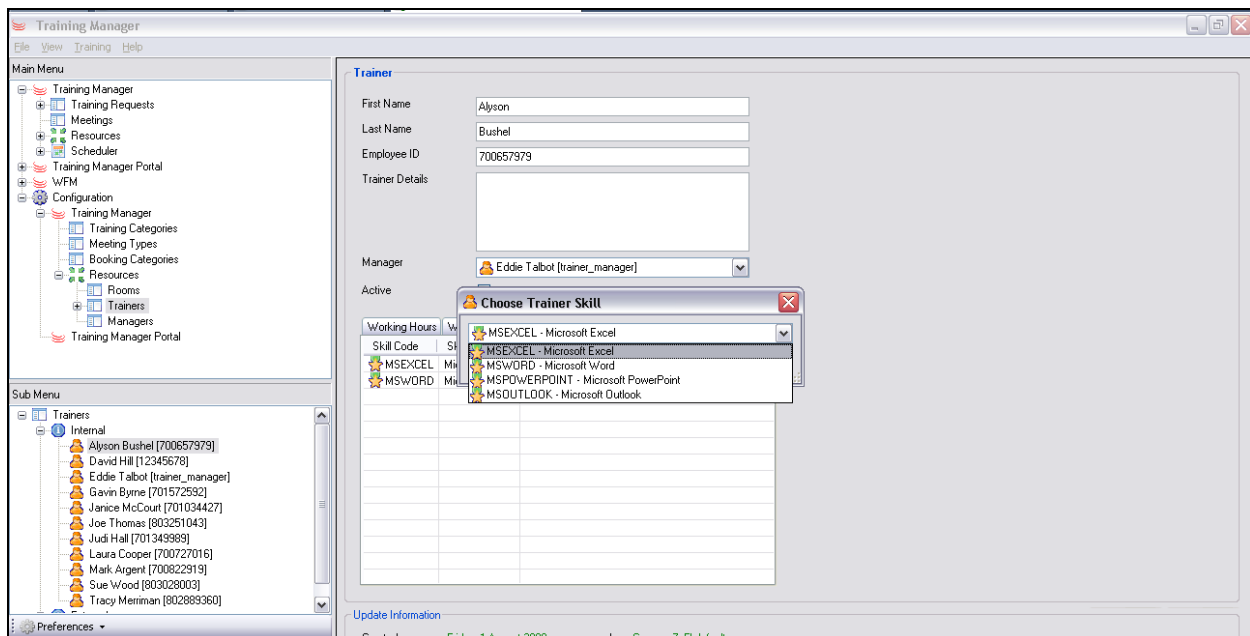
Skills

Select the 'Skills' tab and any skills associated to the Trainer will then be visible.

To add an additional skill right click and select 'Add Skill'.



A drop down box will then be presented to select the Skill for inclusion.



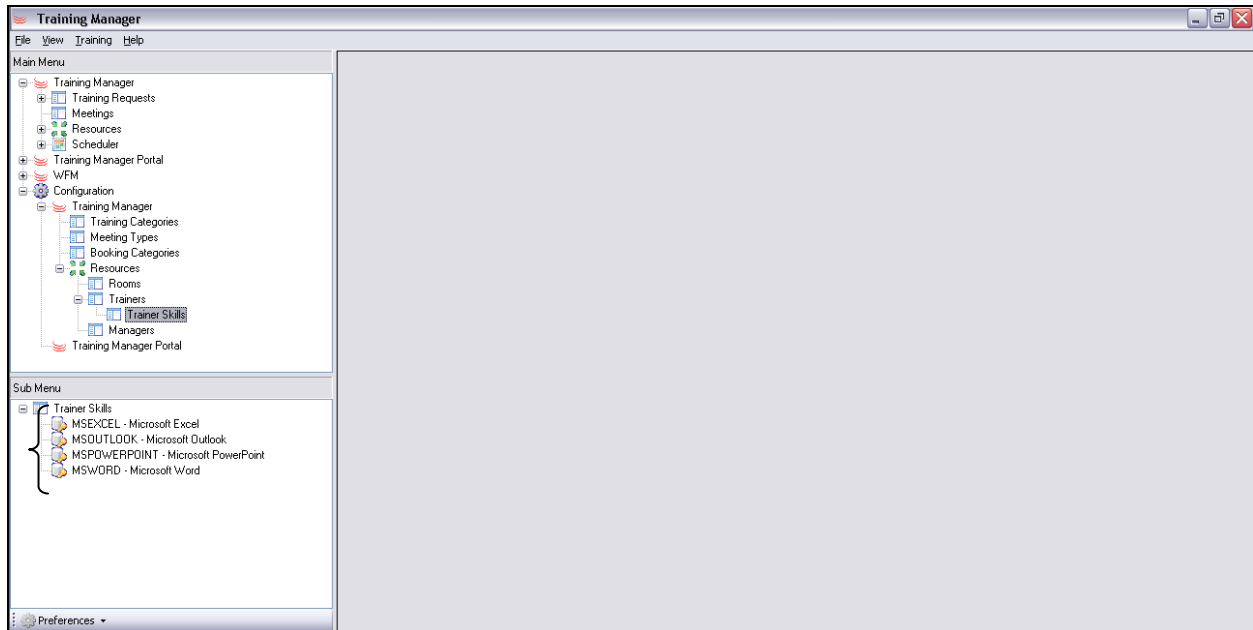
Once selected click on OK and then Apply to save the new skill against the Trainer.

Creating Trainer Skills

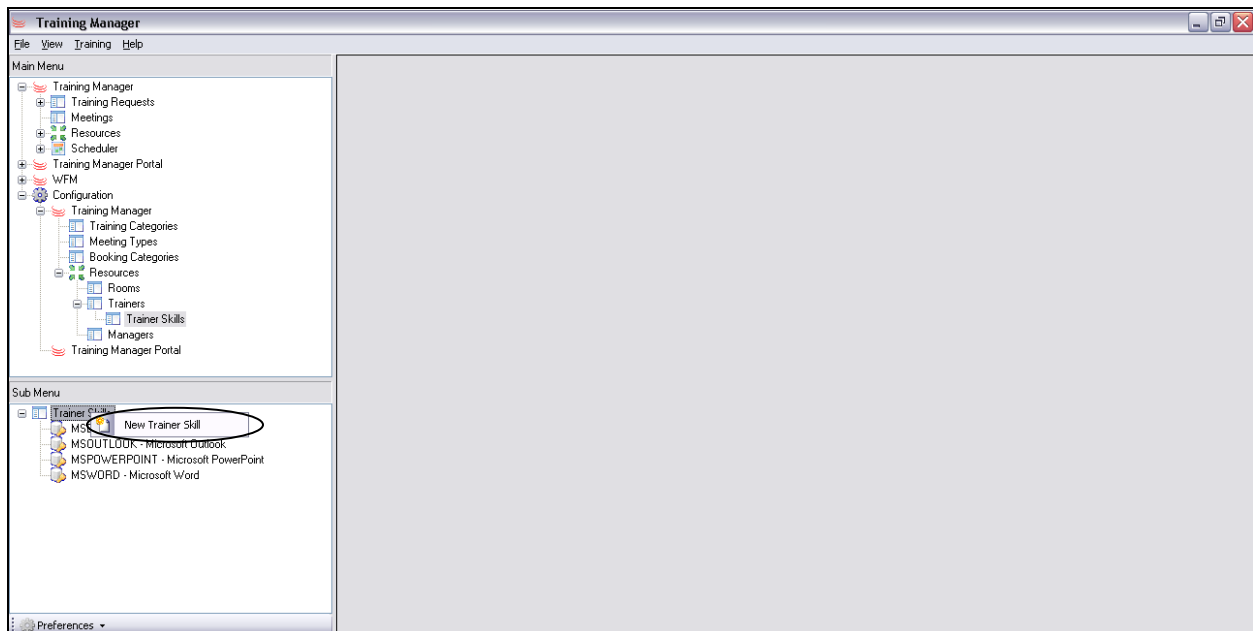
The option is available to associate Skills to Trainers as part of the Trainer configuration.

In the 'Resources' option, expand 'Trainer' to reveal 'Trainer Skills'.

In the Trainer Skills sub menu are the Skills available.

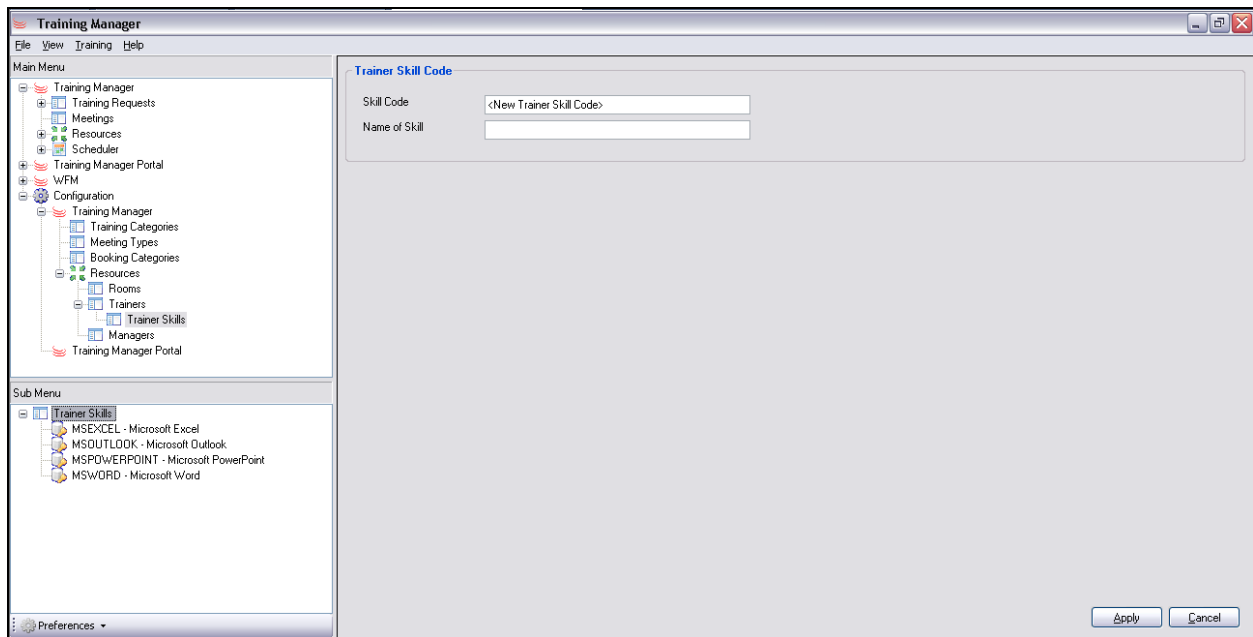


To create a new Skill, right click on the Trainer Skill and select 'New Trainer Skill'.



The option to create a new skill code and name is then available.

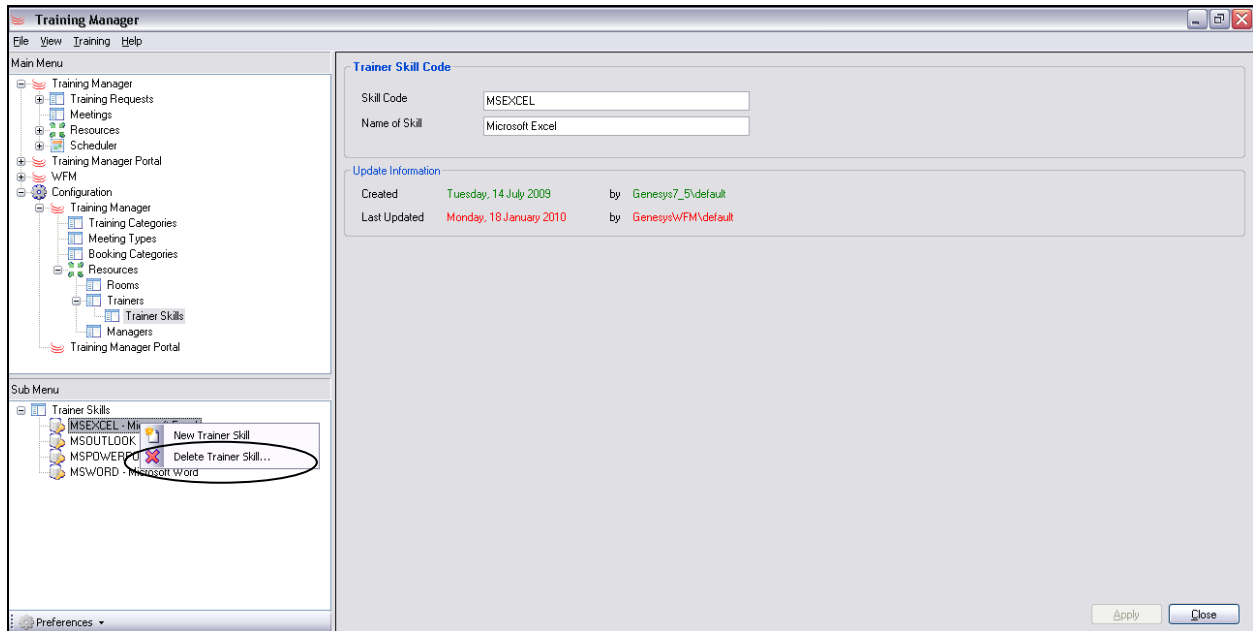
Select Apply once completed.



Once the skills have been created they are then available to select as part of the Trainer configuration

Deleting Trainer Skills

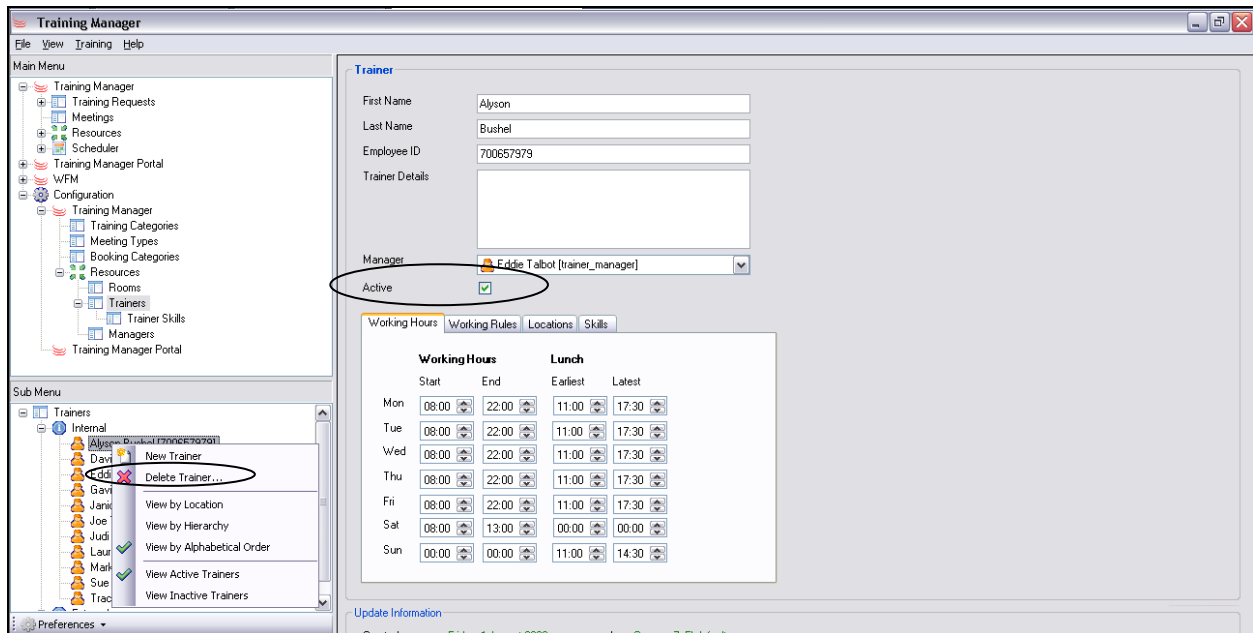
To delete a trainer skill, select the skill from the list of trainer skills and then right click and select 'Delete Trainer Skill'.



Deleting Trainers

The option to delete a trainer is available by selecting the required trainer and then right clicking and selecting 'Delete Trainer'.

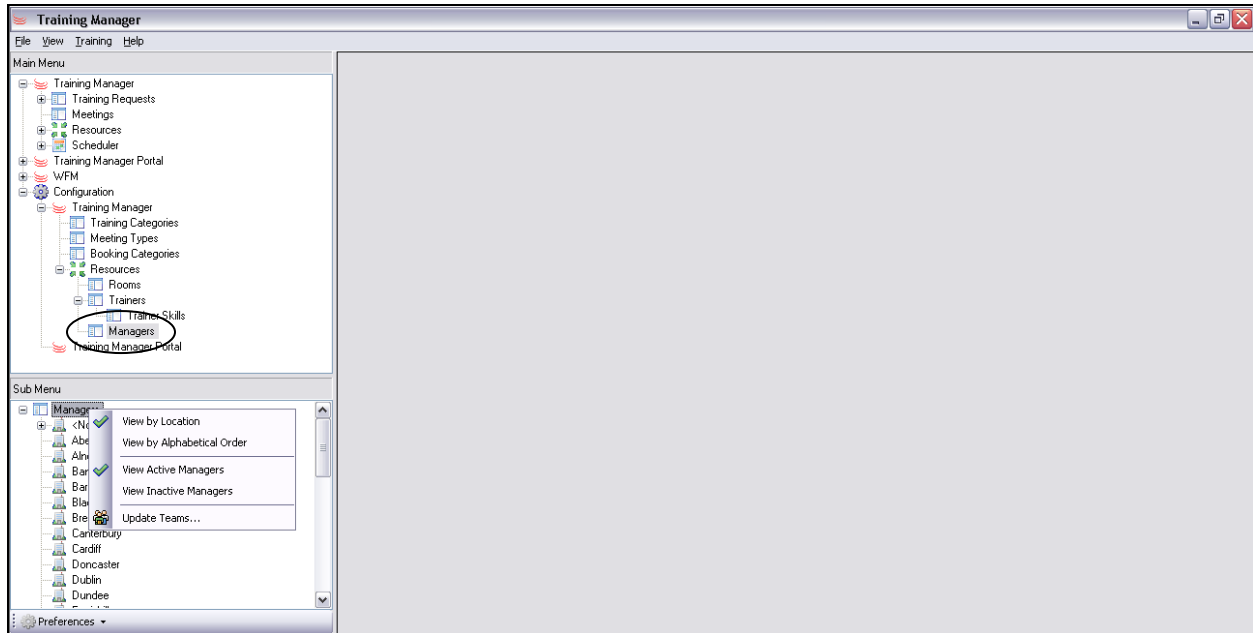
The trainer can only be deleted if there is no activity associated to them. There is the option however to make the trainer Inactive and therefore unavailable for selection by deselecting 'Active'.



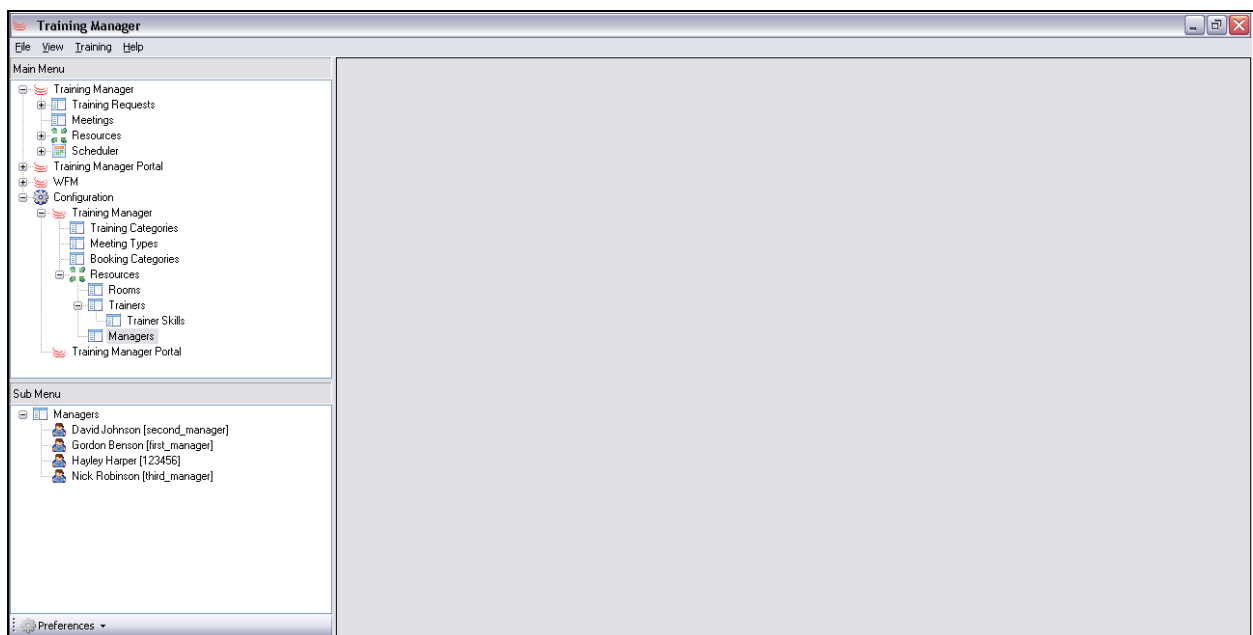
Create Managers

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

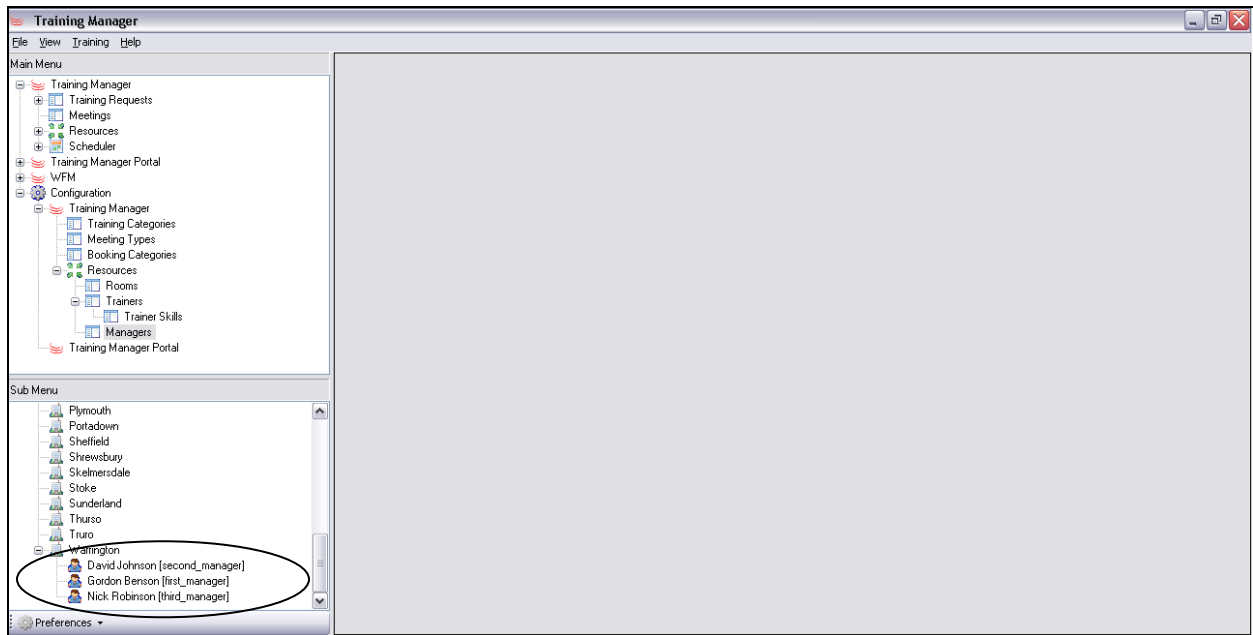
To create a new manager, select 'Managers' by expanding 'Configuration / Genesys Training Manager' and then Resources



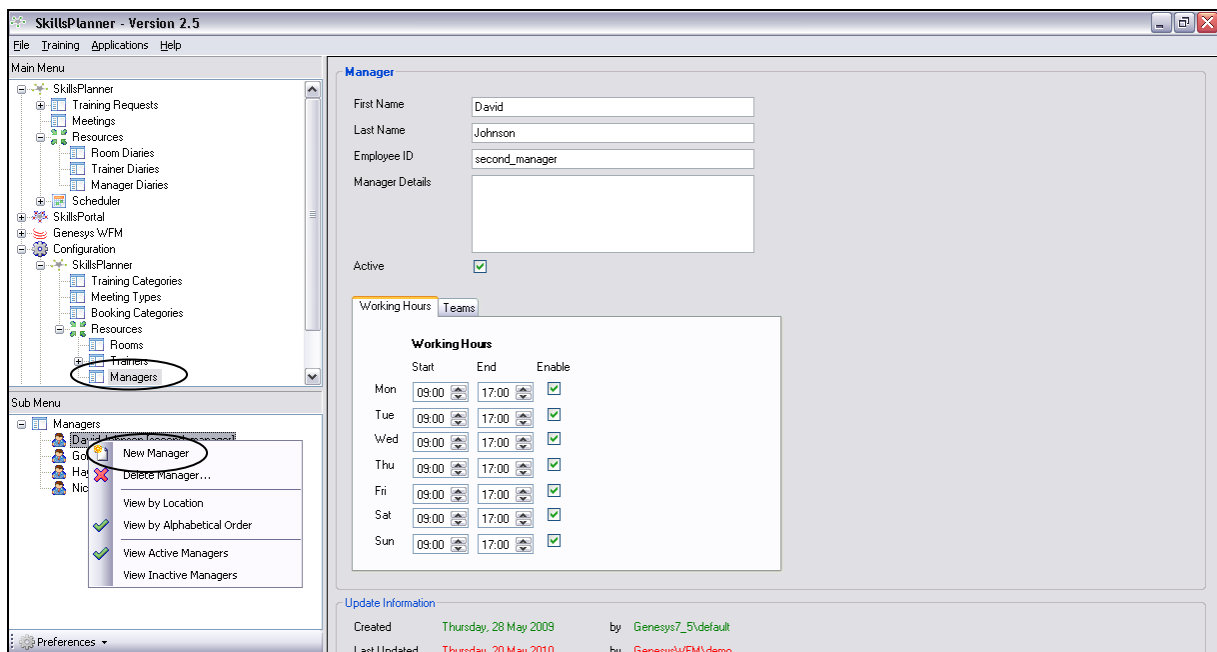
A list of existing managers will appear in the Sub Menu if the option to 'View by Alphabetical Order'.



‘View by Location’ view.

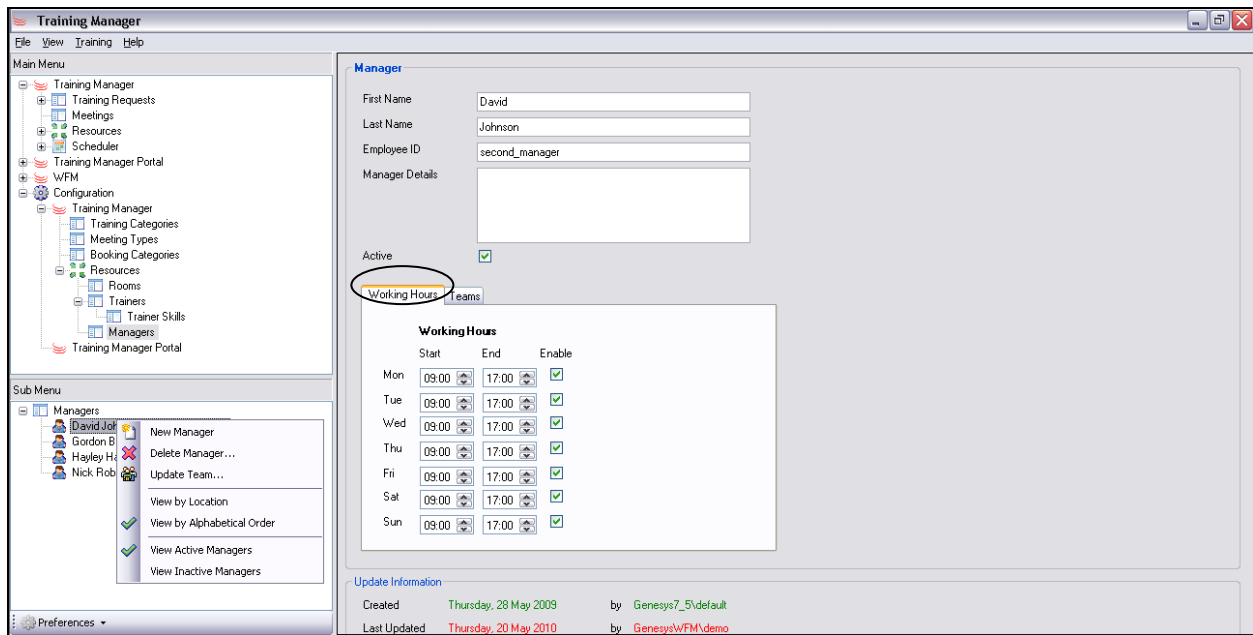


To create a new manager right click on an existing manager and select ‘New Manager’



A window with two options will then be presented.

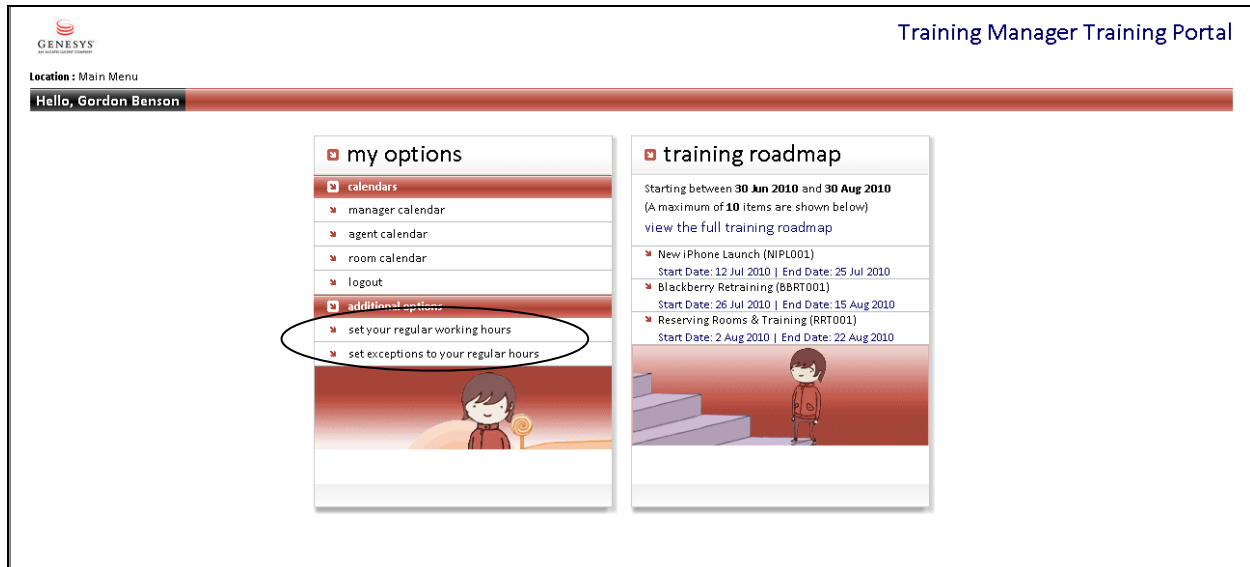
Configure the managers default working hours in the 'Working Hours' tab.



Once the default working hours have been set in Genesys Training Manager these can be changed in the managers' web portal.

The example below displays a manager's web portal home page with two options available under 'additional options'.

- Set your regular working hours
- Set exceptions to your regular hours



Set Your Regular Working Hours

After selecting the option the following window will appear which enables the manager to change their default working hours. The working hours have to be defined as Genesys Training Manager needs to know the managers working hours.

Amend the hours as required and deselect any days that are not working days. This will automatically update the manager's default working hours in Genesys Training Manager.

GENESYS Training Manager Training Portal

Location: Main Menu > Set Working Day Defaults

Hello, Gordon Benson

Set Working Day Defaults

Information

Edit the list below to set your default working days and hours. This colour indicates a non-working day.

Day of week	Start Time	End Time	Is a working day
Monday	09:00	17:00	<input checked="" type="checkbox"/>
Tuesday	09:00	17:00	<input checked="" type="checkbox"/>
Wednesday	09:00	17:00	<input checked="" type="checkbox"/>
Thursday	09:00	17:00	<input checked="" type="checkbox"/>
Friday	09:00	17:00	<input checked="" type="checkbox"/>
Saturday			<input type="checkbox"/>
Sunday			<input type="checkbox"/>

Save

Set Exceptions to Your Regular Working Hours

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

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

Training Manager Training Portal

Location: Main Menu > Set Working Days

Hello, Gordon Benson

Set Working Days

Note

Please do not use this form to define periods of scheduled absence (e.g. Holidays, Training Days) where you would otherwise be working.

This form is for specifying UNPAID, NON-WORKING time only.

Information

Edit the list below to set your working days and hours. This colour indicates a non-working day.

Month/Year: July 2010

Day of week	Use default hours	Start Time	End Time	Is a working day
Thu 1	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Fri 2	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Sat 3	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Sun 4	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Mon 5	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Tue 6	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Wed 7	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Sat 17	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Sun 18	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Mon 19	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Tue 20	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Wed 21	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Thu 22	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Fri 23	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>

The second tab in creating a manager is 'Teams' and managers are associated to their teams in the 'User Selection' process which is covered in the next section.

Training Manager

File View Training Help

Main Menu

- Training Manager
 - Training Requests
 - Meetings
 - Resources
 - Scheduler
- Training Manager Portal
- Users
- WFM
- Configuration
 - Training Manager
 - Training Categories
 - Meeting Types
 - Booking Categories
 - Resources
 - Rooms
 - Trainers
 - Trainer Skills
 - Managers
 - Training Manager Portal

Sub Menu

- Managers
 - David Johnson [second_manager]
 - Gordon Benson [first_manager]
 - Hayley Harper [123456]
 - Nick Robinson [third_manager]

Manager

First Name: David

Last Name: Johnson

Employee ID: second_manager

Manager Details

Active: ☒

Working Hours: **Teams**

Team	Location	Site	Business Unit
Team 3	Warrington	Modesto	First Direct National Bank

Update Information

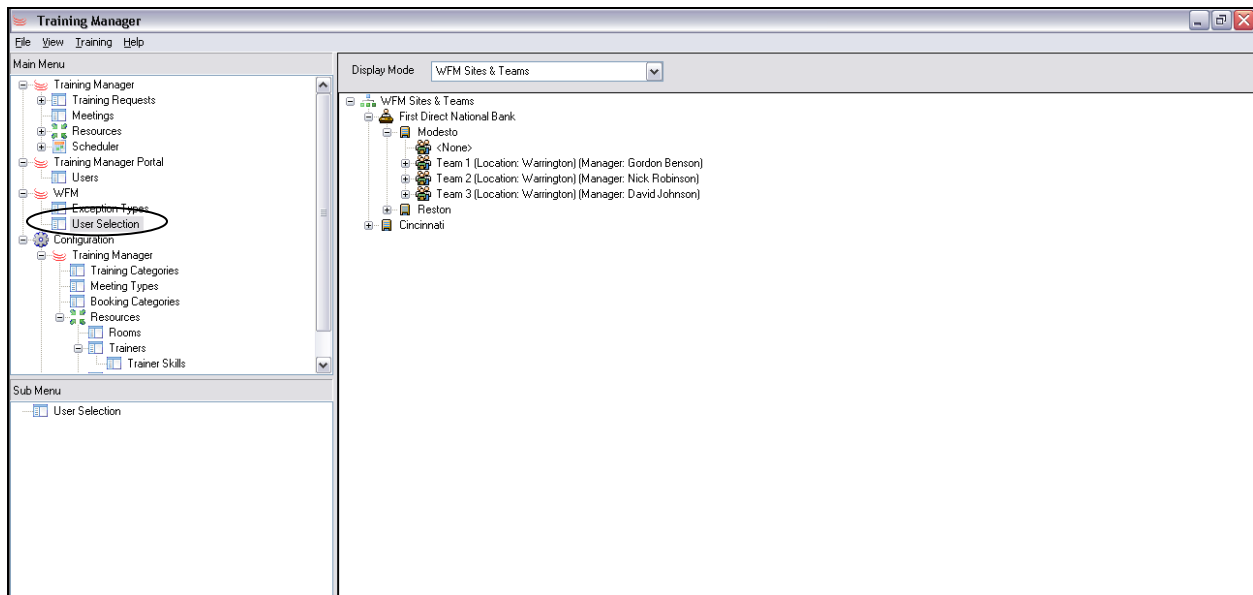
Created: Thursday, 28 May 2009 by: Genesys7_5\default

Last Updated: Thursday, 20 May 2010 by: GenesysWFM\demo

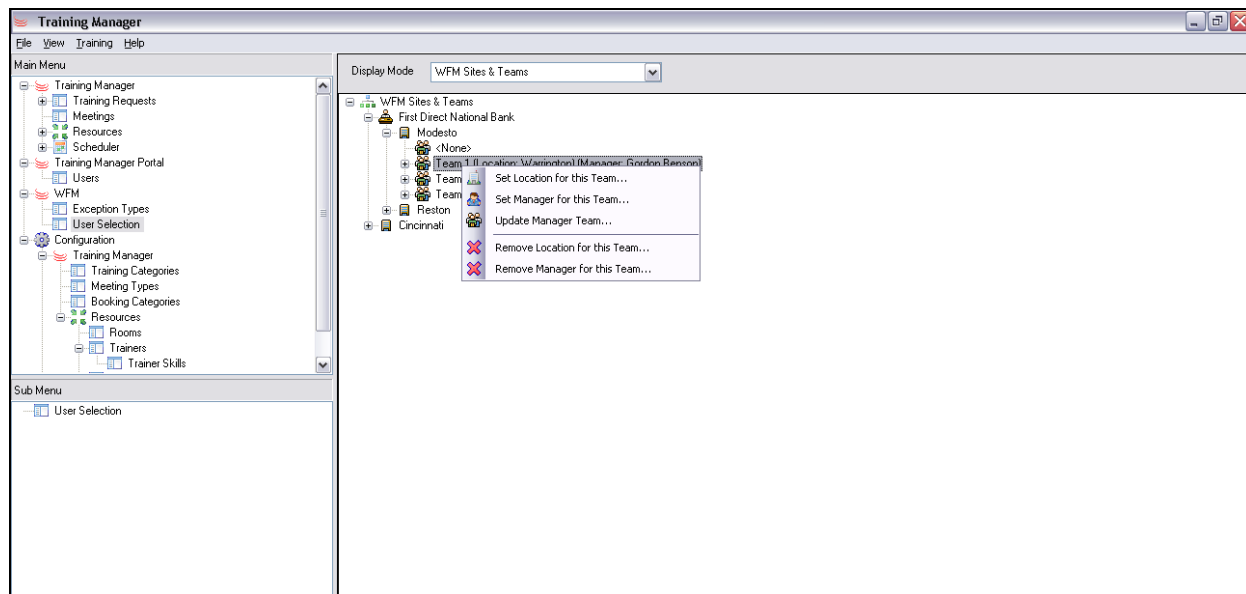
Associating Managers to Teams and Teams to Locations

For the purpose of scheduling team meetings managers have to be associated to their WFM teams and for the purpose of scheduling classroom training, teams need to be associated to locations.

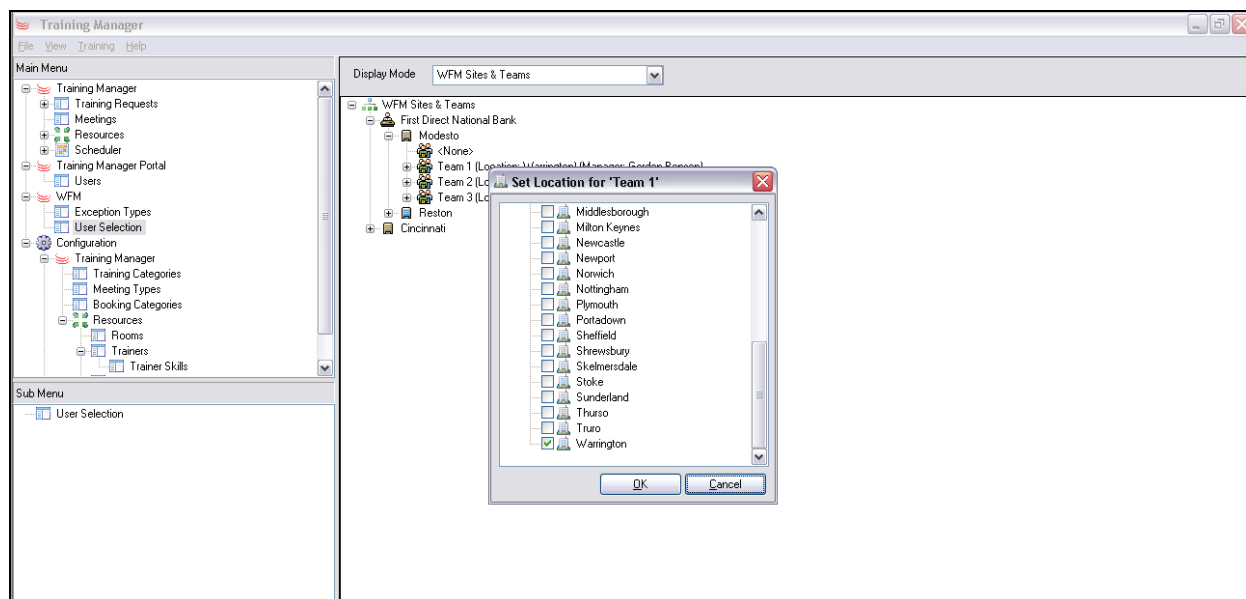
To associate managers to teams select 'User Selection' from the 'Genesys WFM' main menu option. Click on 'User Selection' in the Sub Menu to reveal the Genesys WFM Sites & Teams in the main window as per the example below.



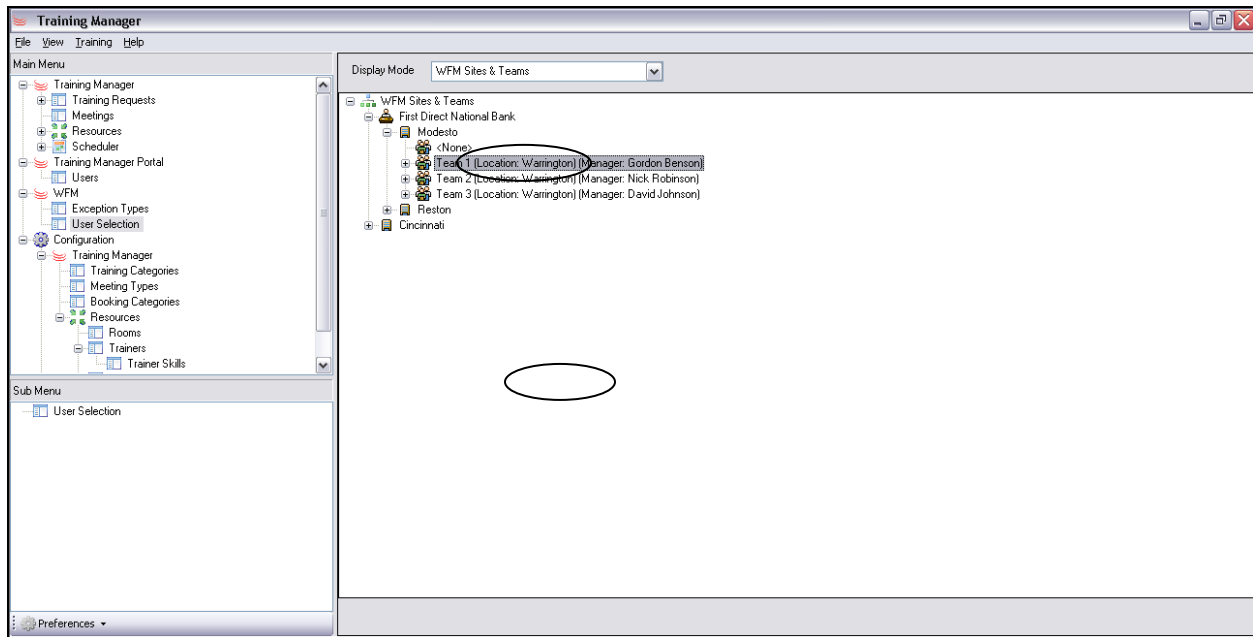
By right clicking on the relevant team the option is presented to 'Set Location for the Team...' and to 'Set Manager for the Team...'



After selecting 'Set Location for the Team...' the locations are presented in a list to select the relevant location.

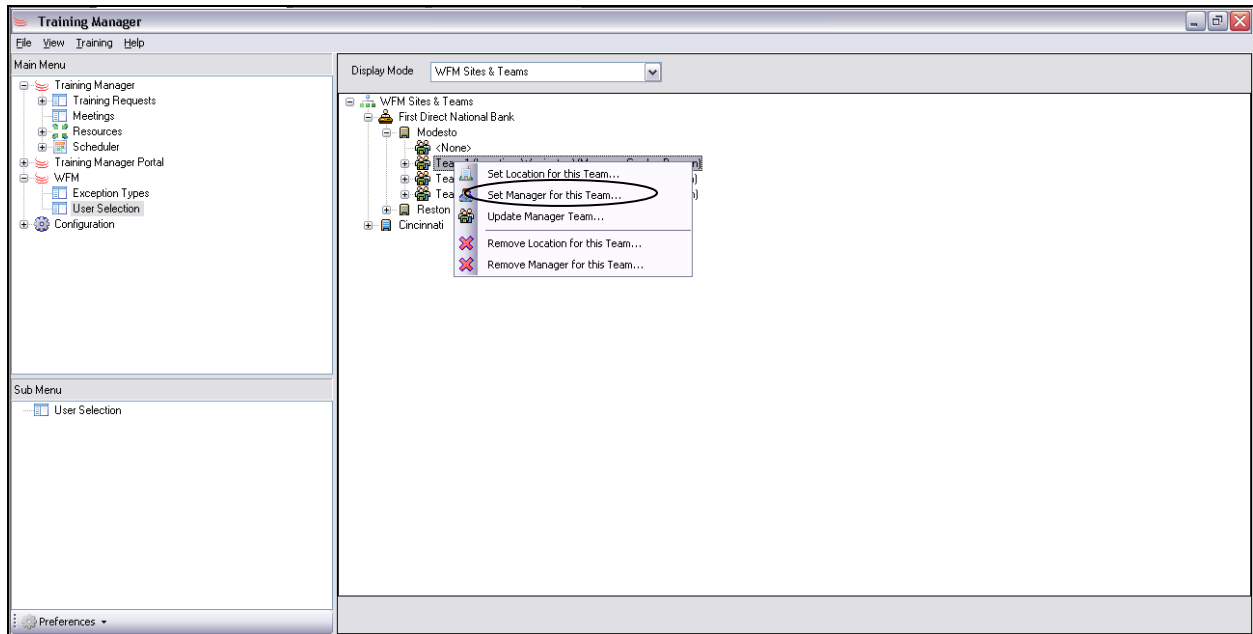


After selecting the location from the list, this will appear against the team.

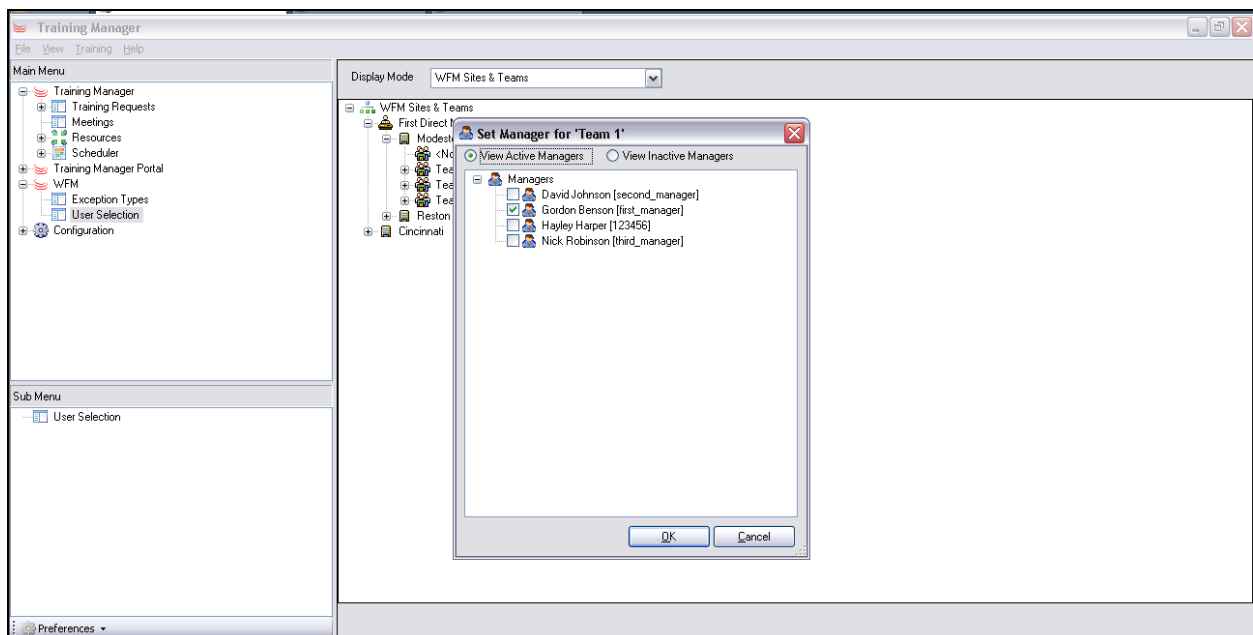


To associate the manager to the team again right click on the team and the option is then available to 'Set Manager for the Team...'

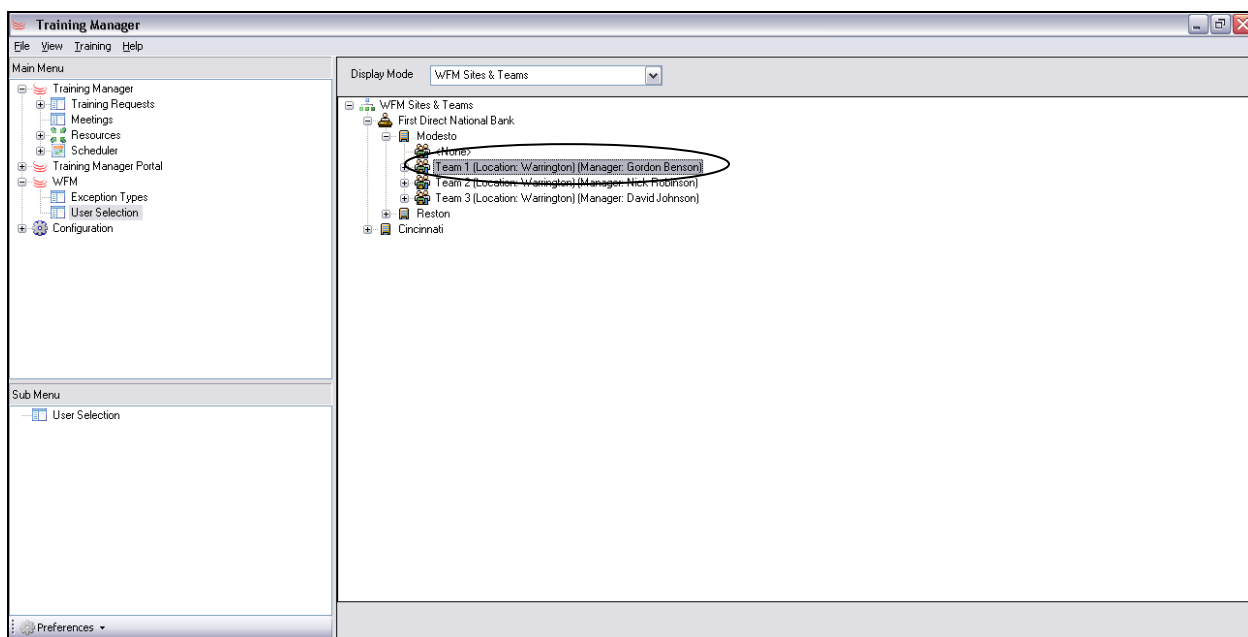
There is also the option to update the managers' team where there is integration into the client HR system.



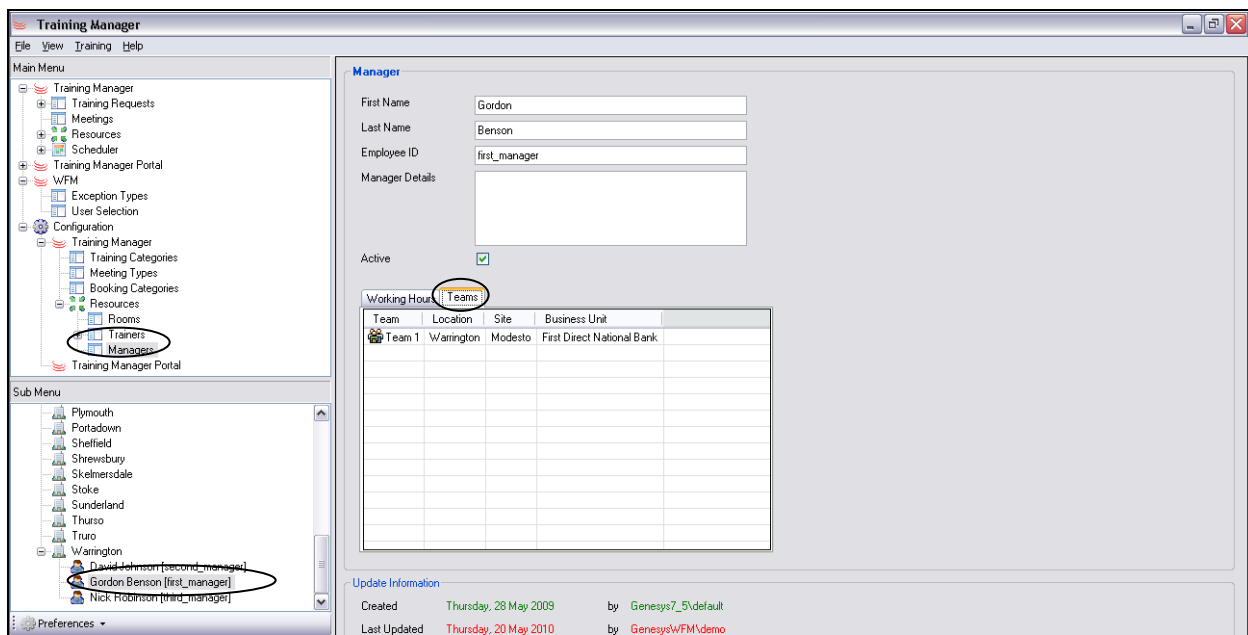
After selecting the option a list of managers will be presented. Select the relevant manager to associate to the team and click on 'OK'.



Once the manager and location has been selected this will show against the team.

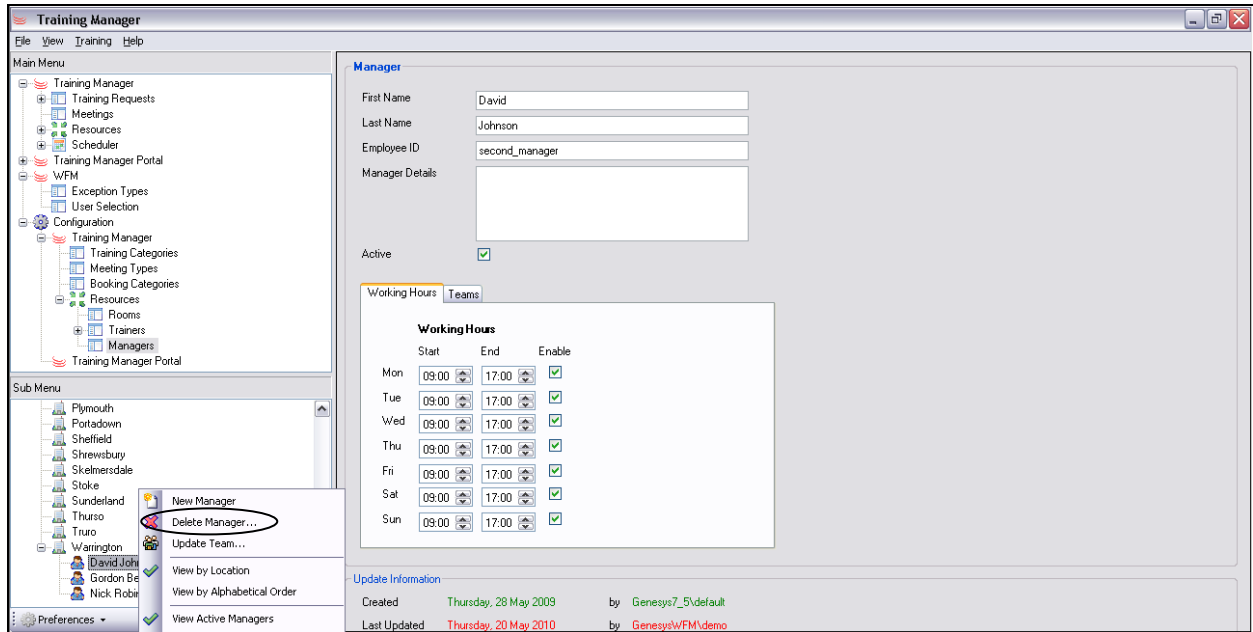


The team would then automatically appear in the Manager 'Team' view list.



Deleting a Manager

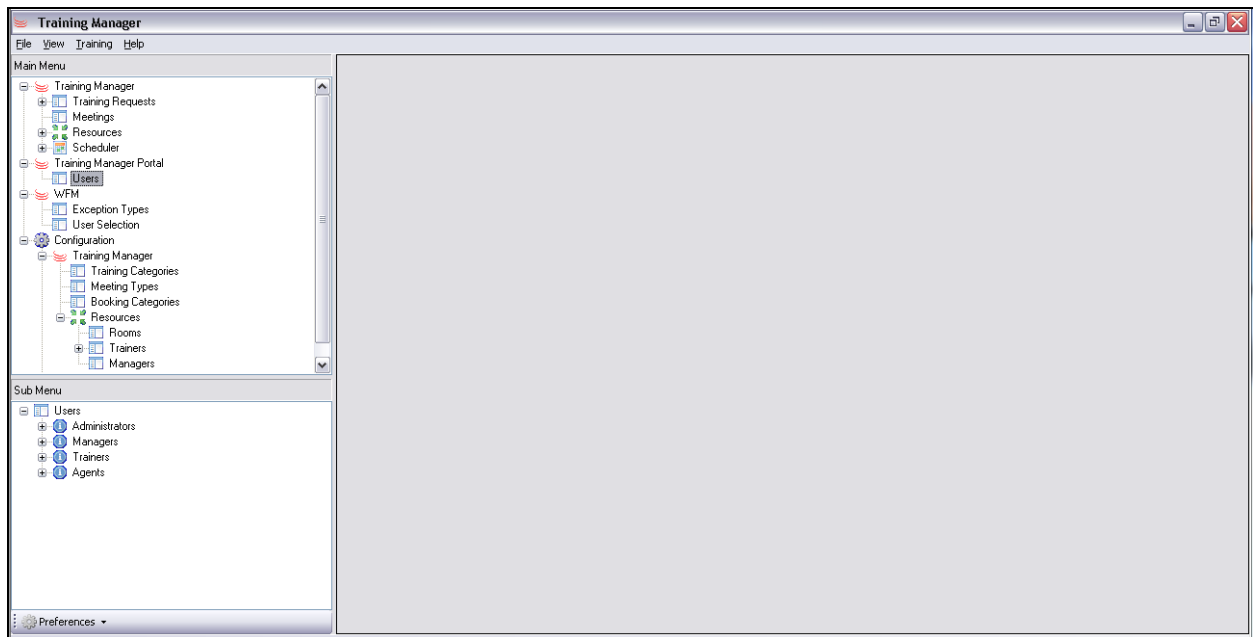
To delete a Manager, right click on the manager and select 'Delete manager...'



Skills Portal - Creating & Managing User Access

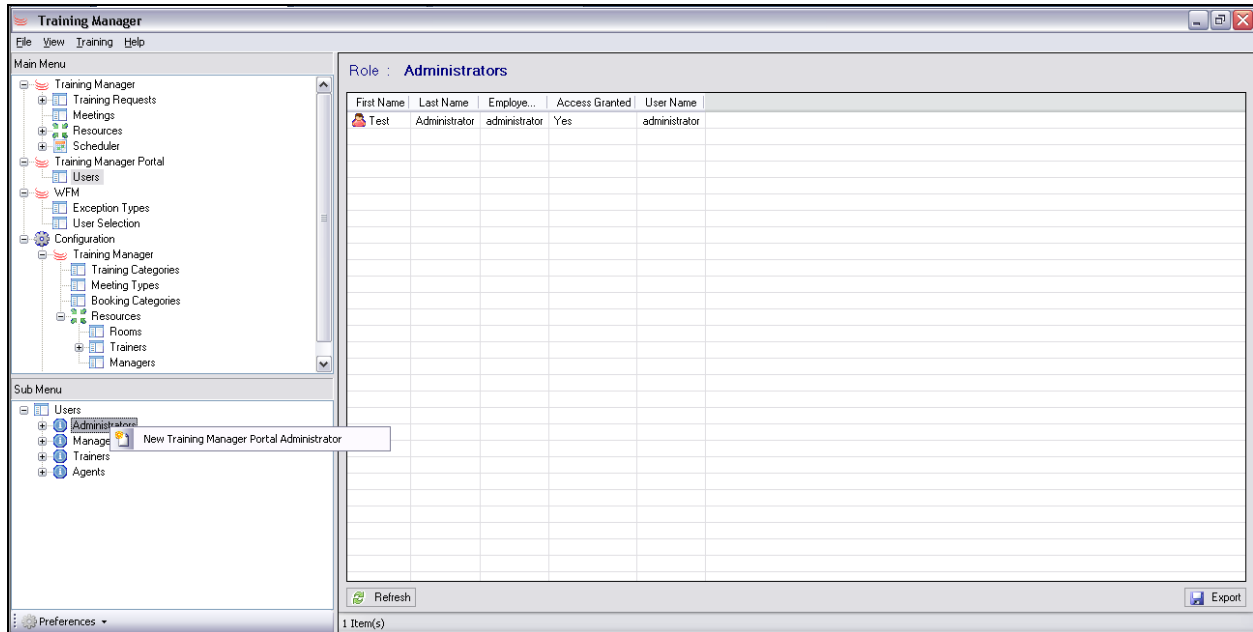
Select 'Users' under 'Web Portal' to view the user options:

- Administrators – are manually created, see the instructions below.
- Manager – the Managers web portal view is automatically created when a Manager is created in Genesys Training Manager. The Manager does have to be granted access
- Trainers – the Trainers web portal view is automatically created when a Trainer is created in Genesys Training Manager. The Trainer does have to be granted access
- Agents – the agent's web portal view is automatically created as soon as they have been selected for training.



Creating a WebPortal Administrator

A new Web Portal Administrator can be created by right clicking on 'Administrator' and then selecting 'New Web Portal Administrator'.



To create a new Administrator, enter the details requested and leave the Login Details as blank to preserve the existing password. This ensures the once the user selects the portal they are logged in automatically.

An Administrator of the Web Portal has read only access to any Trainer Calendar, Room Calendar and Agent Calendar.

Training Manager

File View Training Help

Main Menu

- Training Manager
 - Training Requests
 - Meetings
 - Resources
 - Scheduler
 - Training Manager Portal
 - Users
 - WFM
 - Exception Types
 - User Selection
 - Configuration
 - Training Manager
 - Training Categories
 - Meeting Types
 - Booking Categories
 - Resources
 - Rooms
 - Trainers
 - Managers

Sub Menu

- Users
 - Administrators
 - Managers
 - Trainers
 - Agents

Preferences

Training Manager Portal Administrator

The Administrator has the highest level of access to be able to view and change schedules and assign permissions.

First Name: <New Training Manager Portal Administrator>

Last Name:

Employee ID:

Login Details

User Name:

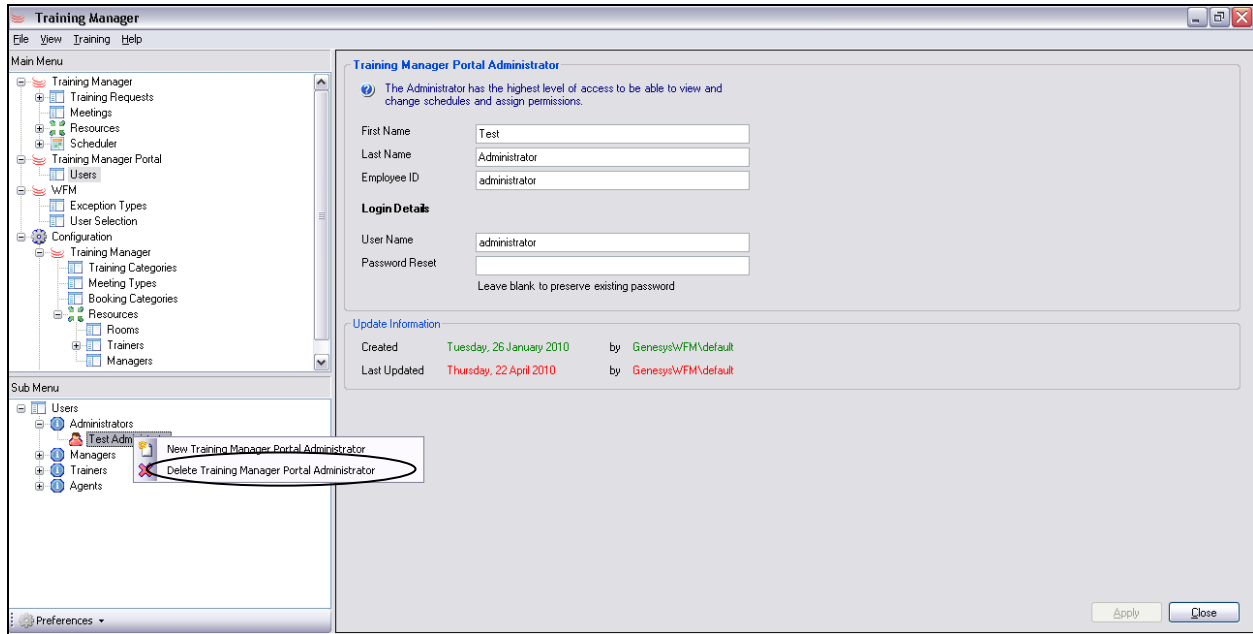
Password Reset:

Leave blank to preserve existing password

Apply Cancel

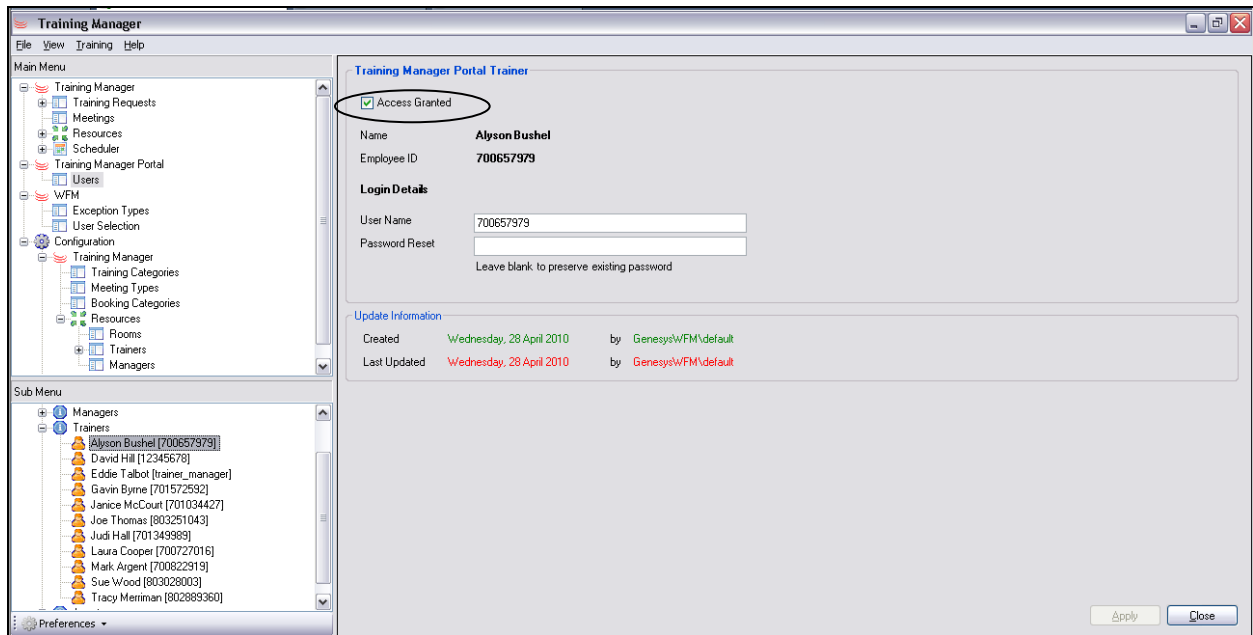
Deleting a WebPortal Administrator

An administrator can be deleted by right clicking on the required administrator and selecting 'Delete Training Manager Portal Administrator'.

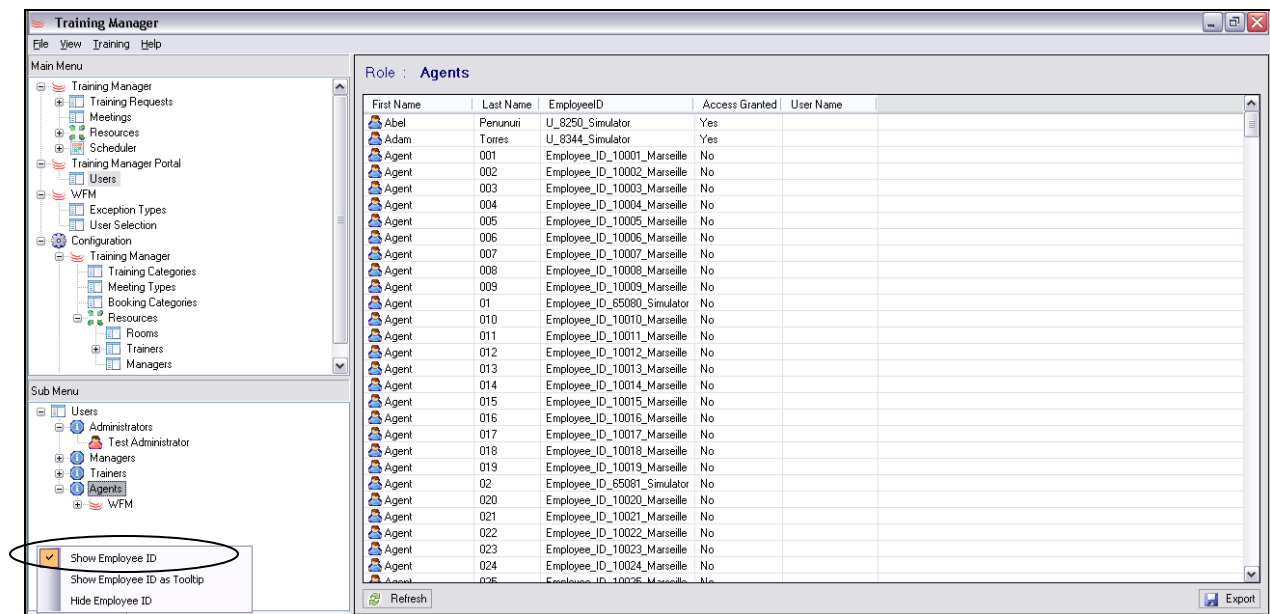


Trainer & Manager WebPortal Access

Once a Trainer and a Manager exists in Genesys Training Manager they need to be granted access to their web portal. Select the Trainer and Manager (expand the Trainer & Manager tree view) from the list and select 'Access Granted'.



There is also the option to view the agents EIN against the agent list by selecting 'Preferences.'



The options are then available to show either hide or view the EIN number as Tooltip.

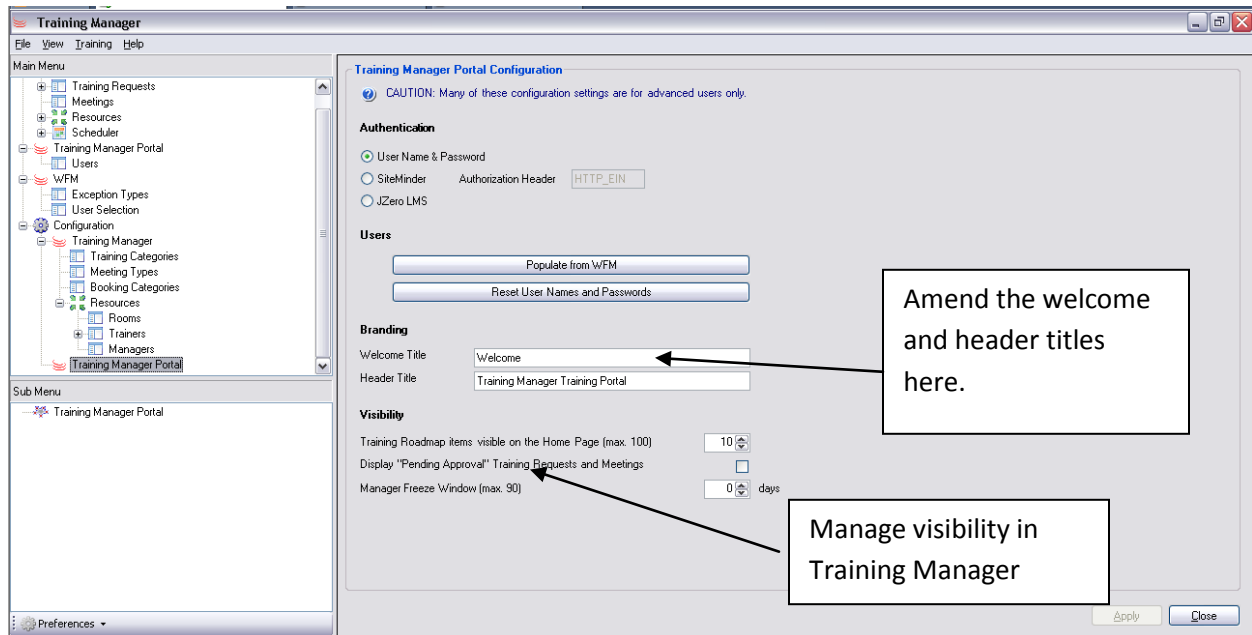
In the example above the option to 'Show Employee ID' has been selected.

Managing the Welcome and Header Titles in Training Manager Portal

Any changes required to the welcome or header title in Training Manager Portal are now managed in Genesys Training Manager.

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

There are now Authentication options.



Training Manager Portal home page view.

The screenshot shows the 'Training Manager Training Portal' header. Below the header, the 'Location' is set to 'Login'. A 'Welcome' message is displayed, followed by the instruction 'To login, enter your User Name and Password below'. A login form is present with fields for 'User Name' and 'Password', and a 'Continue' button. A note states 'These details are case-sensitive'. A link for 'Trouble logging in?' is also visible.

GENESYS
AN HPE COMPANY

Location : Login

Welcome

Welcome

To login, enter your User Name and Password below

These details are case-sensitive

Enter Your Details

User Name

Password

Continue

Trouble logging in?

This website uses a Cookie to remember your login details. If your browser is unable to accept Cookies, you will not be able to login.
To try and remedy this, check that your browser is able to accept Cookies, or try clearing your Cookies cache.

Training Roadmap visibility in the Training Manager Portal

In the example below a maximum of 10 Roadmap items will be visible on the Home Page.

The screenshot shows the 'Training Manager Training Portal' header. Below the header, the 'Location' is set to 'Main Menu'. A greeting 'Hello, Gordon Benson' is displayed. The 'my options' section lists various calendar and additional options. The 'training roadmap' section shows a list of training items, including 'New iPhone Launch (NIPL001)', 'Blackberry Retraining (BBRT001)', and 'Reserving Rooms & Training (RRT001)', each with start and end dates. A link to 'view the full training roadmap' is also present.

GENESYS
AN HPE COMPANY

Location : Main Menu

Hello, Gordon Benson

my options

calendars

- manager calendar
- agent calendar
- room calendar
- logout

additional options

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

training roadmap

Starting between 30 Jun 2010 and 30 Aug 2010
(A maximum of 10 items are shown below)
[view the full training roadmap](#)

- New iPhone Launch (NIPL001)
Start Date: 12 Jul 2010 | End Date: 25 Jul 2010
- Blackberry Retraining (BBRT001)
Start Date: 26 Jul 2010 | End Date: 15 Aug 2010
- Reserving Rooms & Training (RRT001)
Start Date: 2 Aug 2010 | End Date: 22 Aug 2010

Managing Room Bookings

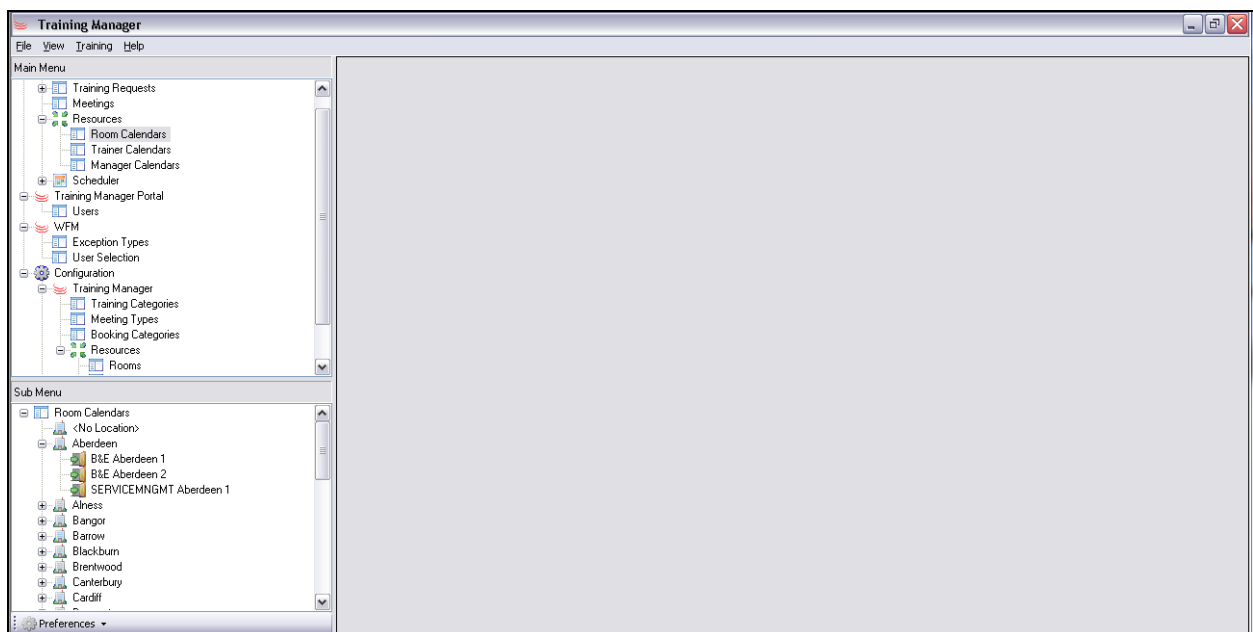
Once rooms have been created they can be included as part of the optimized scheduling process.

The calendar management of the room does need to be kept up to date as the application will avoid using any rooms not available.

Any scheduled room activity will automatically update the room calendar.

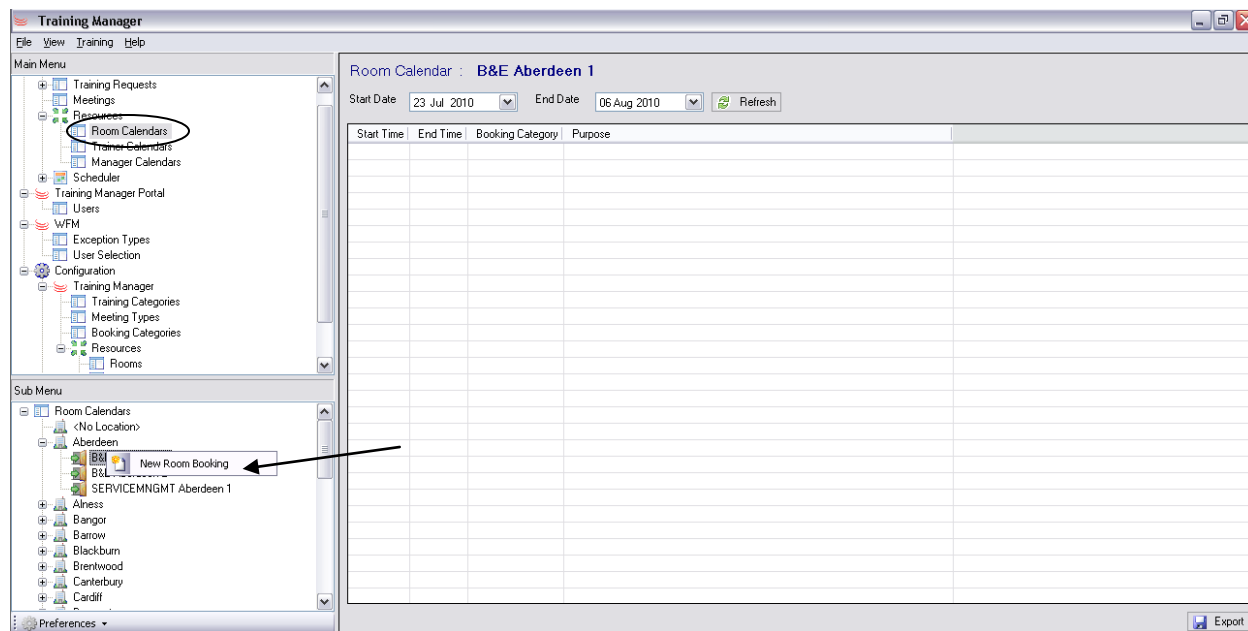
To manually enter a room booking, select 'Room Booking' from the main menu.

A similar tree view will appear in the sub menu listing all of the locations.



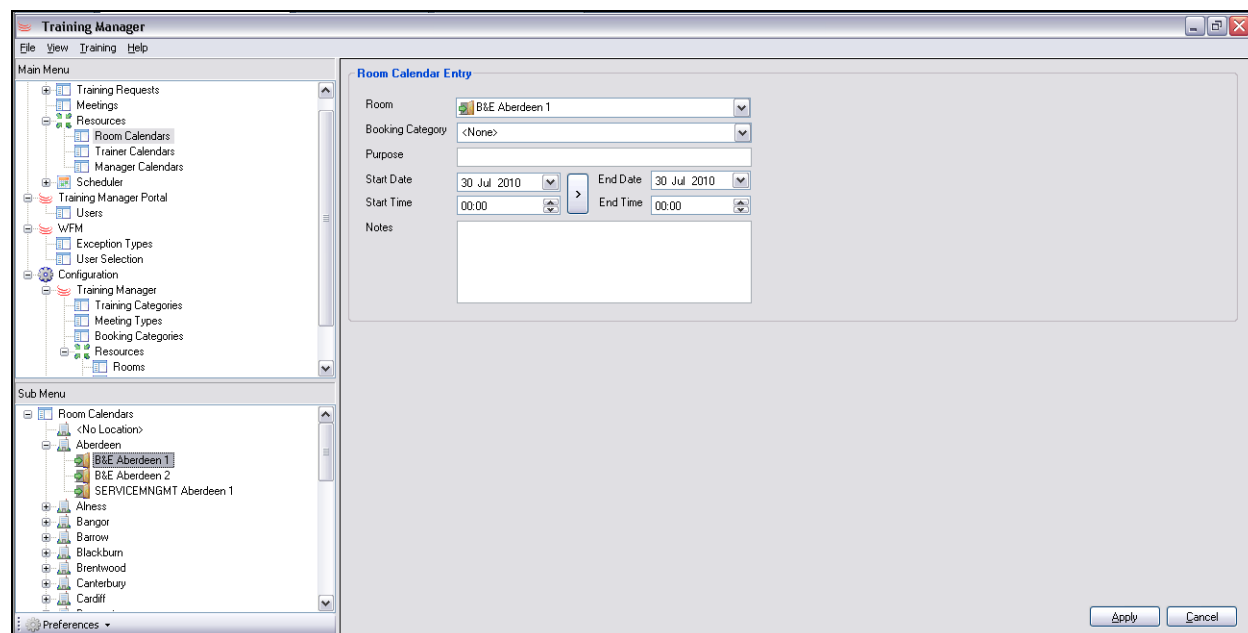
By expanding the location this will list all of the rooms associated.

Right click on the room required and a 'New Room Booking' option appears.

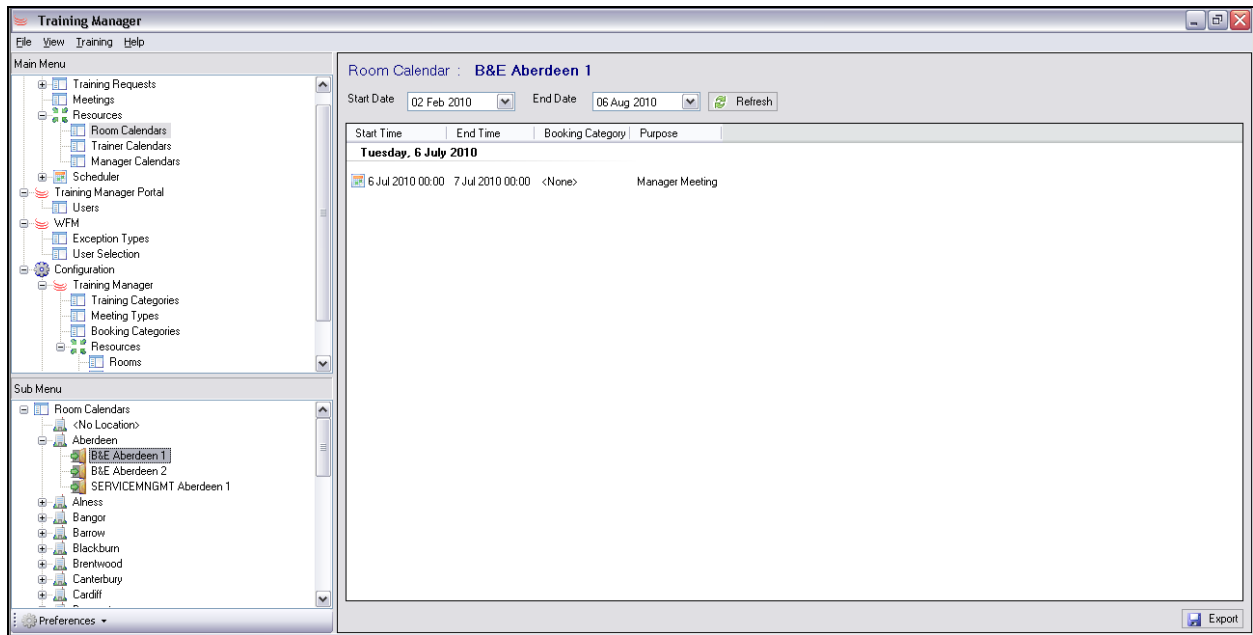


After selecting 'New Room Booking' the room booking form is presented.

Complete the details as required and select 'Apply'.



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

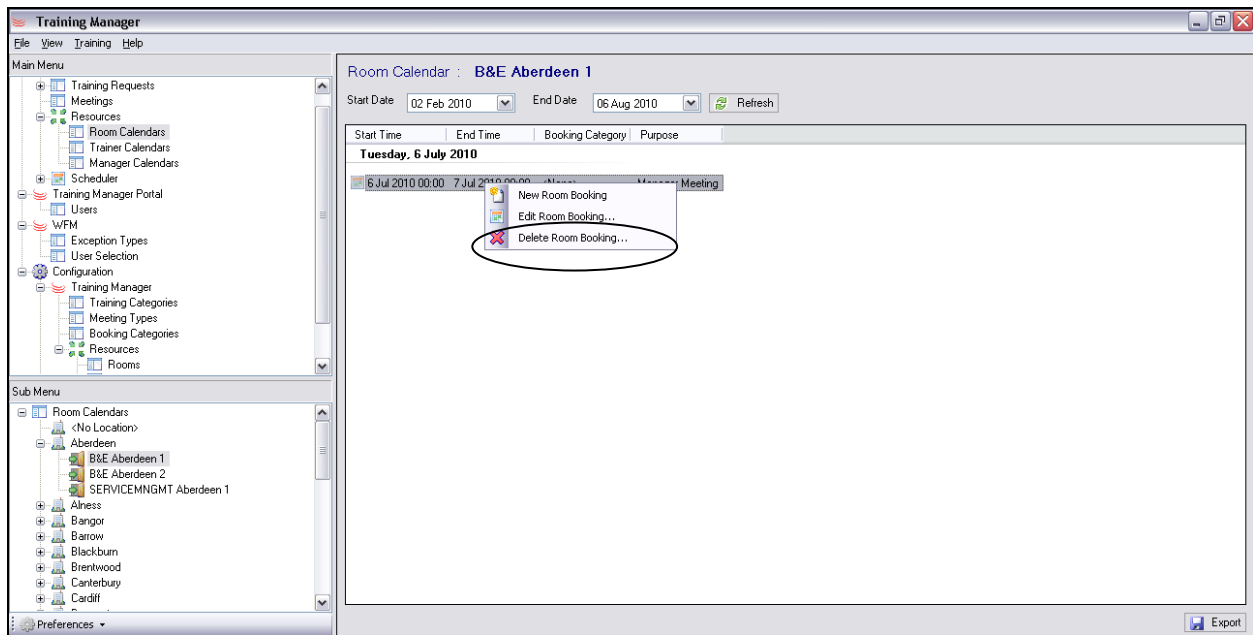


Only room bookings which are not associated to any training activity and have been entered manually can be deleted in the Room Calendar.

Deleting a Manual Room Booking

To delete a manually entered room booking, right click on the calendar entry and then select 'Delete Room Booking'.

Genesys Training Manager will not allow deletion of any scheduled training activity in the room calendar.



Enhanced Trainer Configuration & Visibility

Trainer Hierarchy

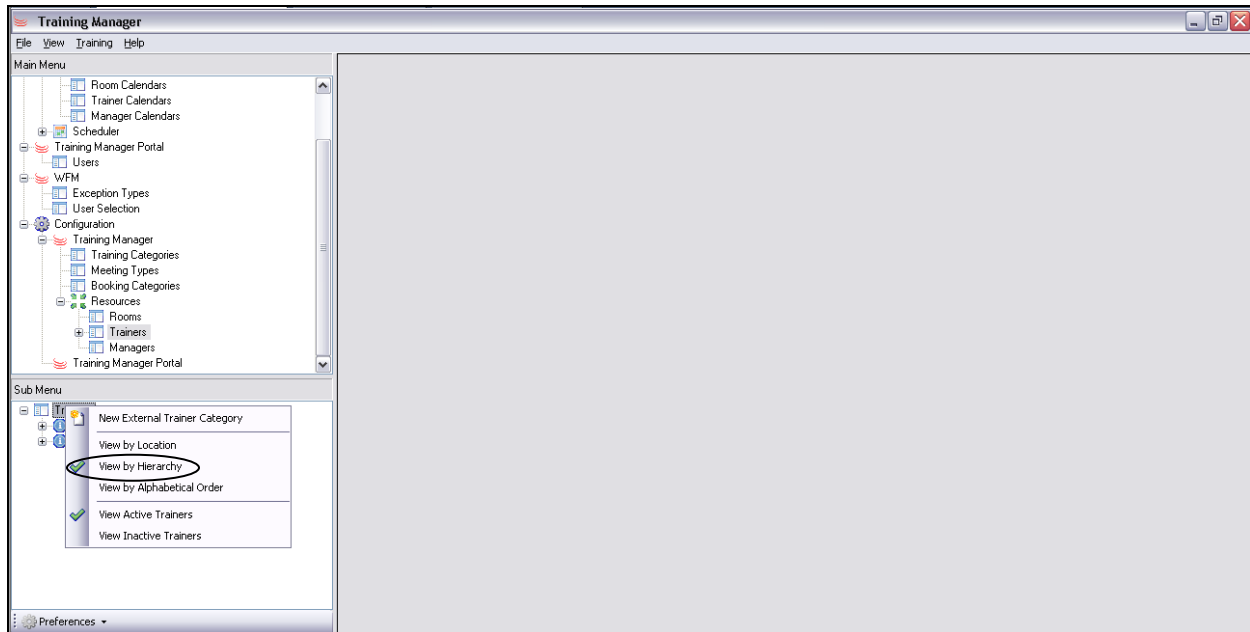
Creating trainer hierarchy is now available in the trainer menu option (previously it was only possible to allow Trainer managers to view the trainers that reported into them by creating trainer managers in the web portal and then selecting the relevant trainers).

After selecting 'Trainers' from the main menu select a specific trainer and the 'Working Hours' tab window will be presented (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 of trainers available which Genesys Training Manager uses to create the hierarchy.

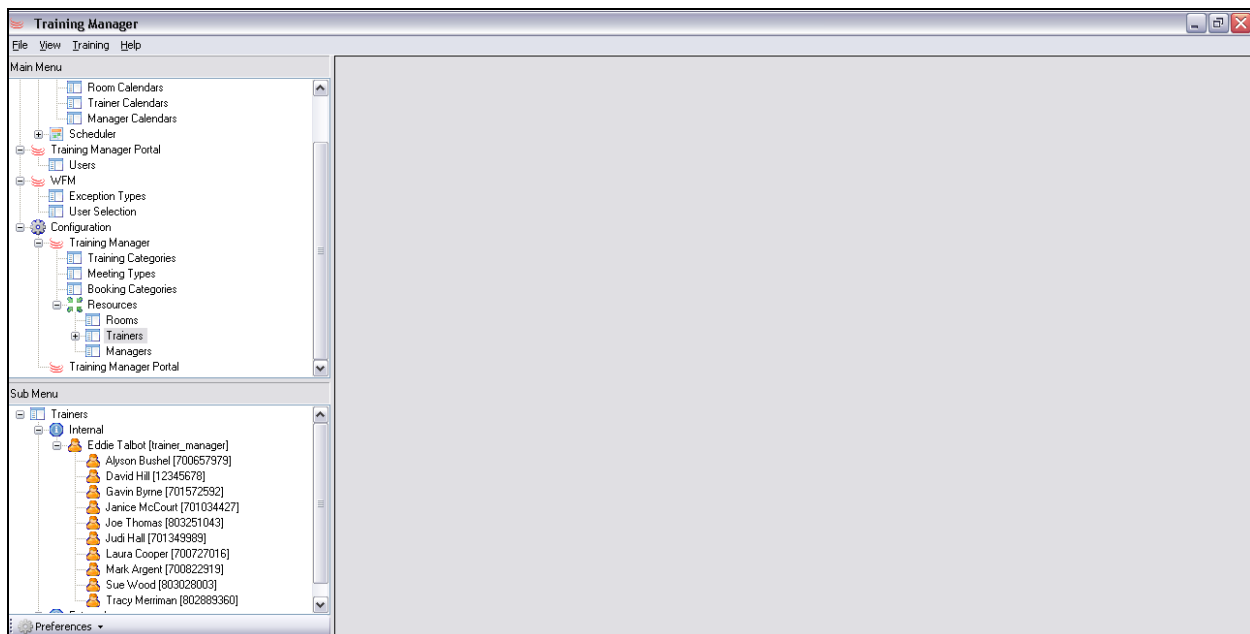
The screenshot shows the Training Manager application interface. The left sidebar contains a Main Menu and a Sub Menu. The Sub Menu is expanded, showing a list of trainers. The 'Trainer' window is open, displaying the configuration for a specific trainer. The 'Manager' dropdown is highlighted with a red circle, showing 'Eddie Talbot [trainer_manager]' as the selected manager. The 'Working Hours' tab is active, showing a table of working hours for each day of the week.

	Start	End	Earliest	Latest
Mon	08:00	22:00	11:00	17:30
Tue	08:00	22:00	11:00	17:30
Wed	08:00	22:00	11:00	17:30
Thu	08:00	22:00	11:00	17:30
Fri	08:00	22:00	11:00	17:30
Sat	08:00	13:00	00:00	00:00
Sun	00:00	00:00	11:00	14:30


In the example on the previous page the Trainer Manager is Eddie Talbot. To view the trainers that Eddie Talbot is allowed to view, change the sub menu view to 'View by Hierarchy' by right clicking on Trainers sub menu option.



By expanding the detail in the sub menu will reveal the trainers that report into the trainer manager.



The trainer manager has visibility of the trainers associated to them and can select to view their activity.



GENESYS
AN ACADIA COMPANY


Training Manager Training Portal


Location: [Main Menu](#) > Trainer Calendar


Hello, **Eddie Talbot**

trainer calendar

⚠ Required fields are all shaded in this colour

 **scheduled**
Training or meeting partially or fully scheduled

 **completed**
Training no longer requiring action

 **Other**
Non-Training Activity

trainer
☐ View by Location
☒ View by Alphabetical Order
☐ View by Hierarchy

[Select All](#) | [Unselect All](#)

☐ Internal

☐ Alyson Bushel [700657979]
☐ David Hill [12345678]

Standard ViewPlanner View

Search
[Go to Advanced Search](#)
[Information](#)
There is currently no data to show.

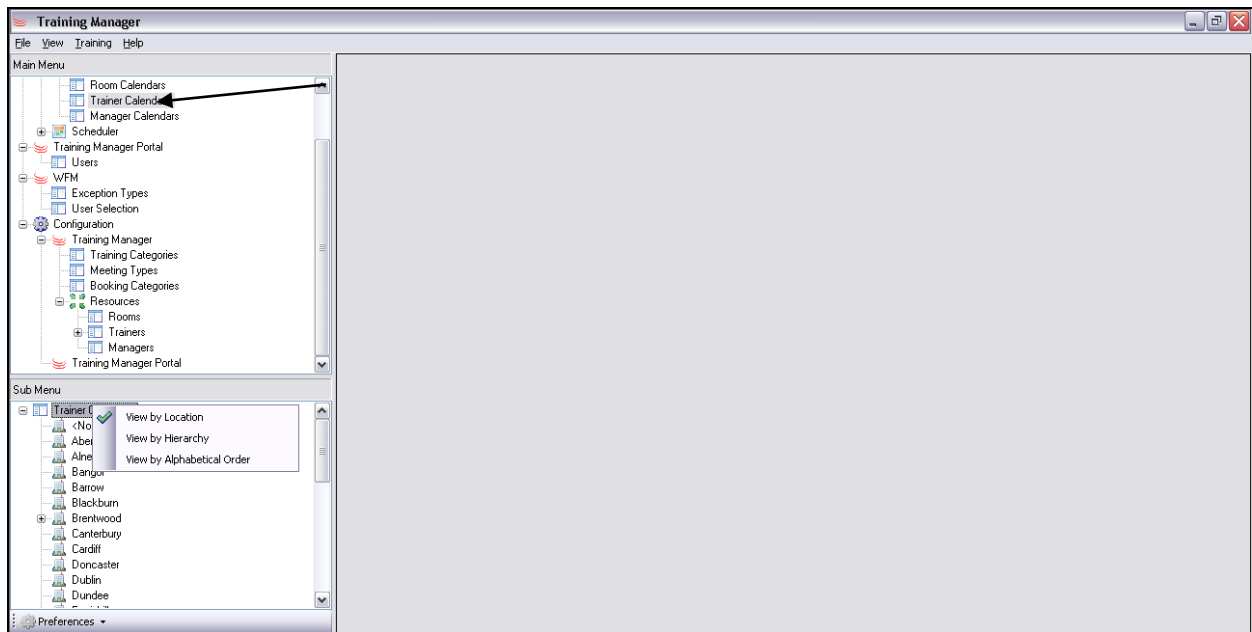
Start Date16 July 2010End Date13 August 2010Sort ByTrainerGo

Trainer Calendar

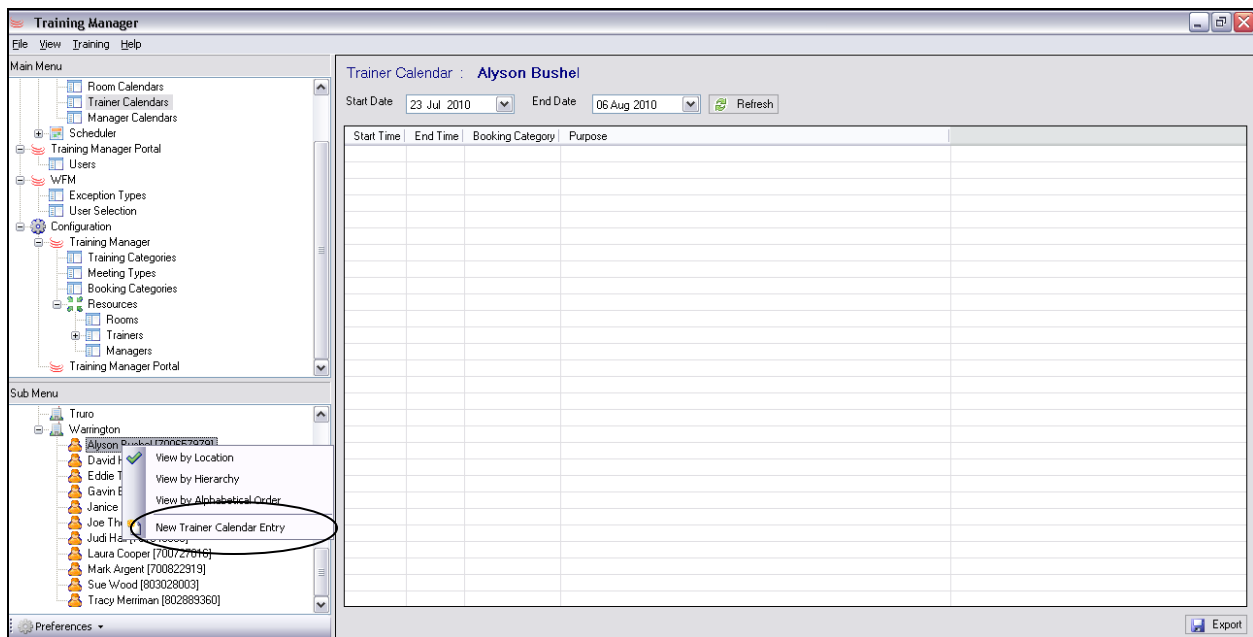
Trainer Calendar availability can be managed in two ways:

1. Manage Trainer availability in Genesys Training Manager.

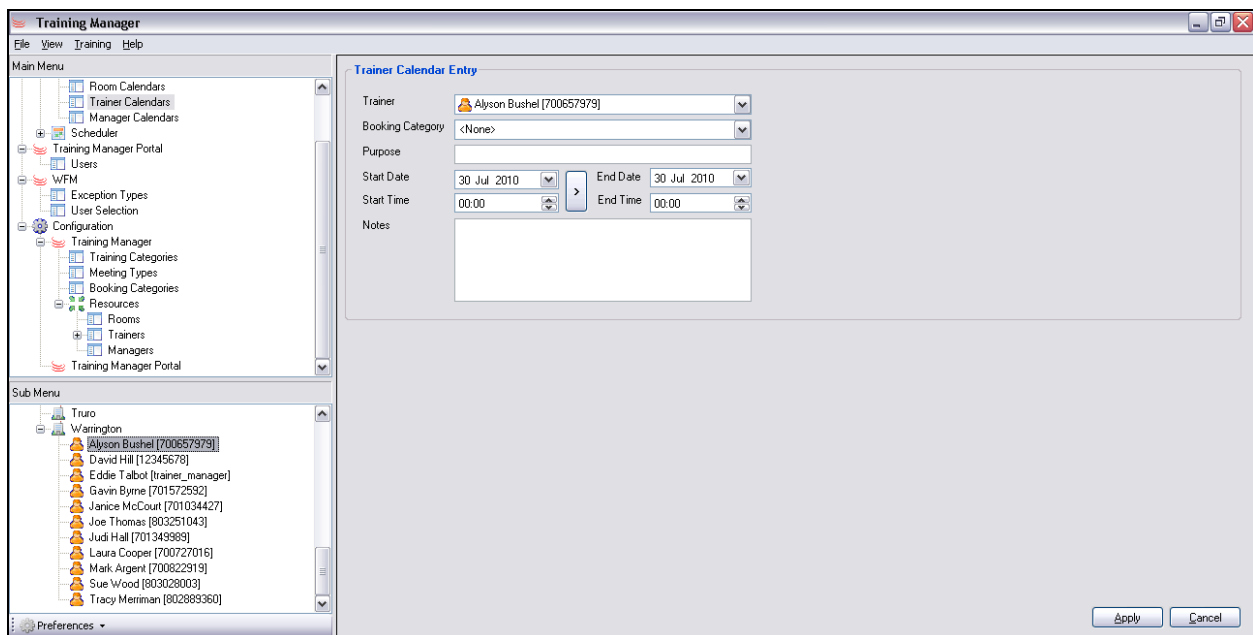
Select 'Trainer Calendar' from the Main Menu. The locations are then listed in the Sub Menu. Right click on 'Trainer Calendar' to amend the view if required.



To make a new calendar entry, right click on the required Trainer and select 'New Trainer Calendar Entry'.

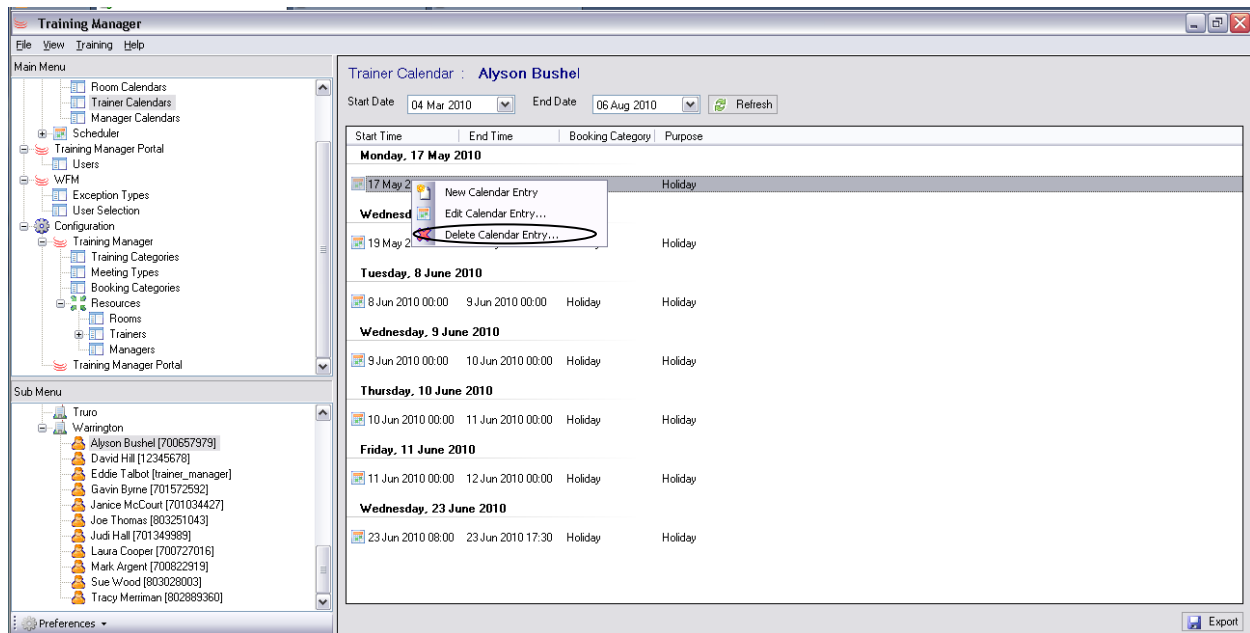


Complete the details as required, selecting a 'Booking Category' from the pull down box and select 'Apply' once all the details have been completed.



Delete a Trainer Calendar Entry

To delete a Trainer calendar entry right click on the entry and select 'Delete Calendar Entry...'



2. Manage Trainer availability through the Web Portal.

The Trainer now has the ability to manage their availability through their webportal. The option to insert any new activity is available within the 'Planner View' of the Trainer Calendar by right clicking in the calendar view and selecting 'New Entry'.

The screenshot displays the 'Training Manager Training Portal' interface. At the top right, the title 'Training Manager Training Portal' is visible. Below the header, the location is indicated as 'Main Menu > Trainer Calendar'. A greeting bar says 'Hello, David Hill'. The main section is titled 'trainer calendar'. A note states: 'Required fields are all shaded in this colour'. On the left, a 'Key' section lists activity types with corresponding color-coded boxes: Uncategorised (grey), Holiday (orange), Management Meeting (blue), Meeting (green), and Training Session (dark green). The main calendar area has two tabs: 'Standard View' and 'Planner View'. The 'Planner View' is active, showing a calendar for August 2010. The calendar grid displays dates from 26 to 22. A context menu is open over the date 27, showing options: 'New entry', 'Go to today', and 'Show 24 hours...'. A 'Refresh' button is located in the top right corner of the calendar area.

GENESYS
Training Manager Training Portal

Location: Main Menu > Trainer Calendar

Hello, David Hill

trainer calendar

Required fields are all shaded in this colour

Key

- Uncategorised
- Holiday
- Management Meeting
- Meeting
- Training Session

Standard View Planner View

Click to refresh the calendar if you have changed the content to view Refresh

August 2010

David Hill

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	01 Aug
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22

New entry
Go to today
Show 24 hours...

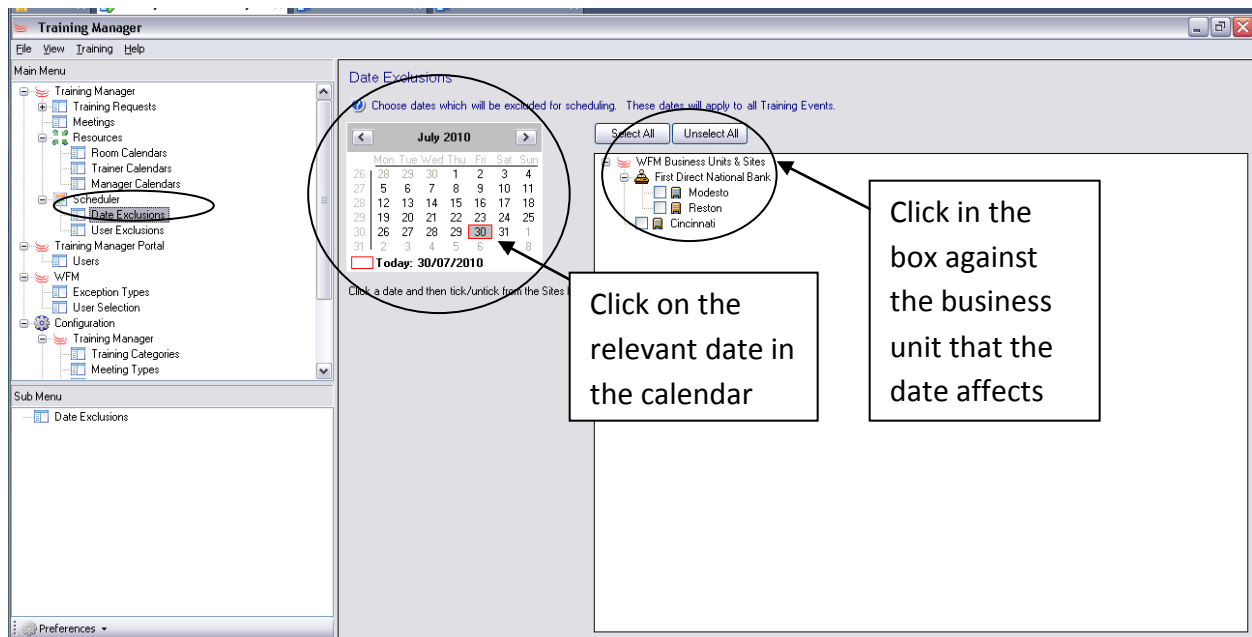
Scheduler

Date Exclusions

Specific dates can be stored for excluding when scheduling training.

Select Date Exclusion under the Scheduler option in the Main Menu.

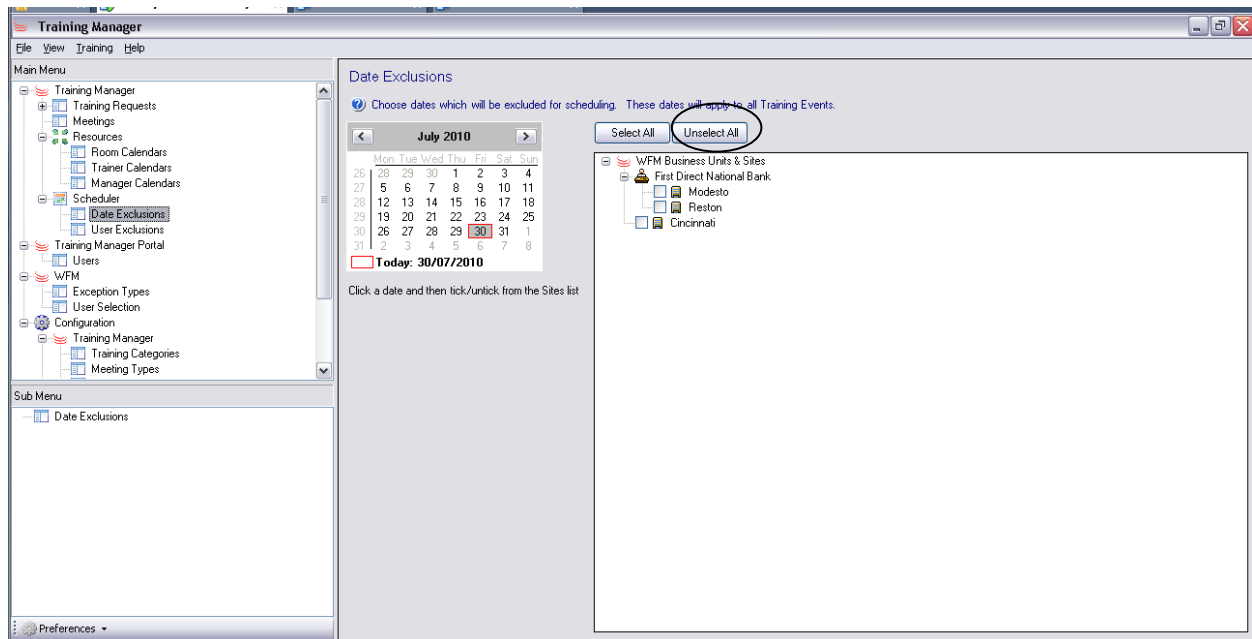
After selecting a date in the calendar, associate it to the relevant business unit by clicking in the box at the right hand side.



Once the date has been selected close the Date Exclusion box by selecting another item from the main menu.

Removing a Date Exclusion

To remove a date that has been excluded click on the required date and select 'Unselect All'. This will remove the date from being excluded.



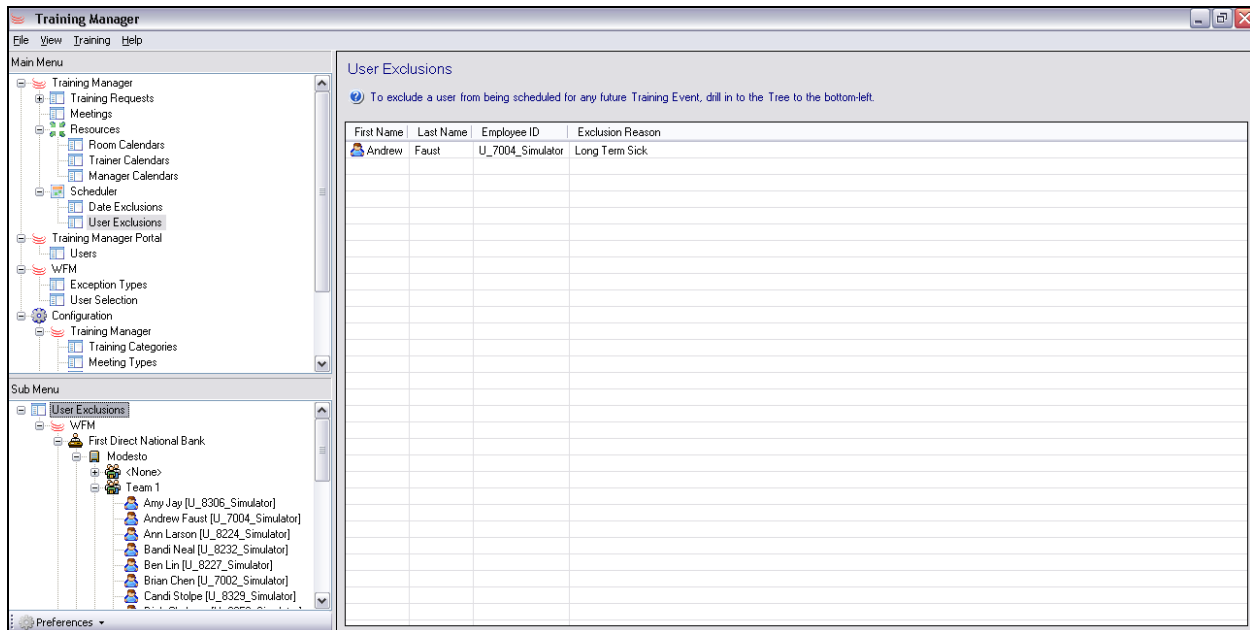
User Exclusion

The ability to exclude agents due to long term exceptions is now available.

Select User Exclusions from the main menu.

After selecting 'User Exclusion', the Business Units in Genesys WFM together with the associated agents are then visible in the Sub Menu window.

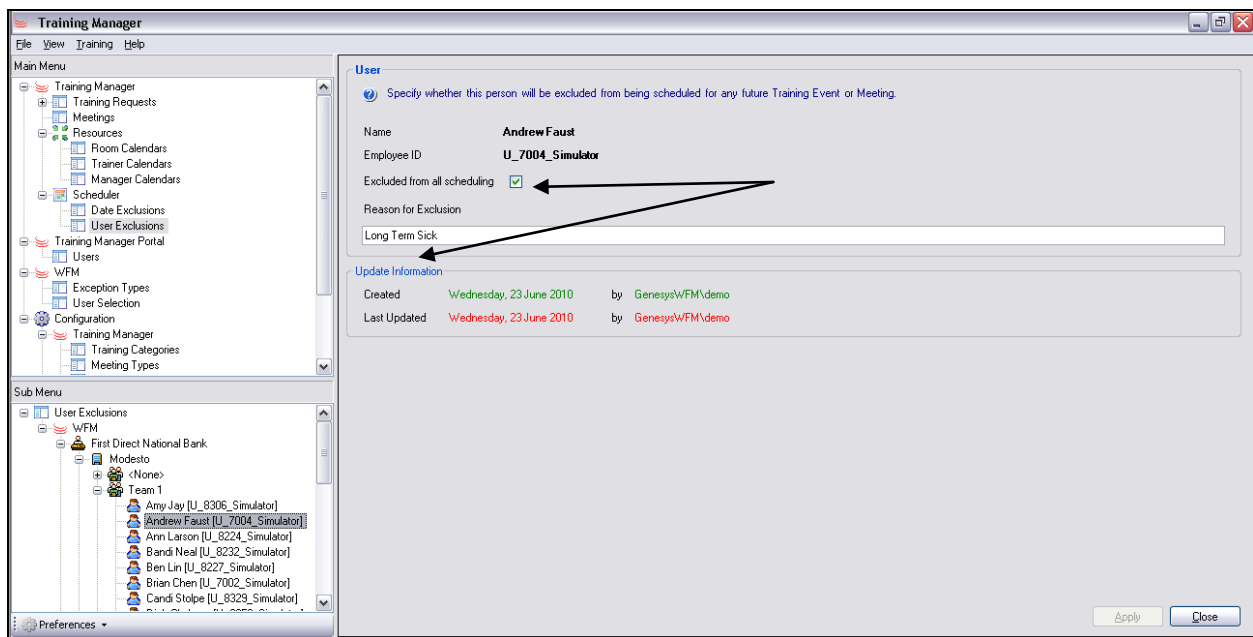
Any agents excluded previously are visible in the User Exclusion list.



Once an agent has been identified as being unavailable long term, select the agent and the option to exclude the agent from being scheduled for any future training is available.

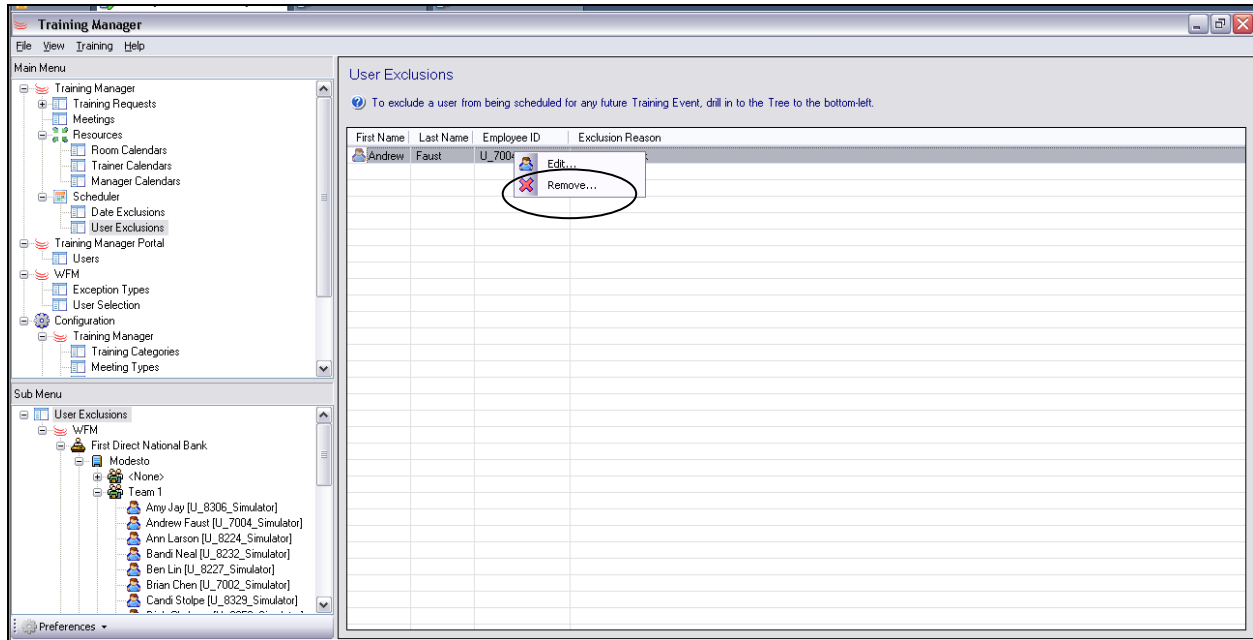
Select 'Exclude from Schedule' and the option to provide a reason is presented (this information will then be visible in the Completion Status Report if the agent has been selected as part of the 'User Selection').

Select Apply to save.



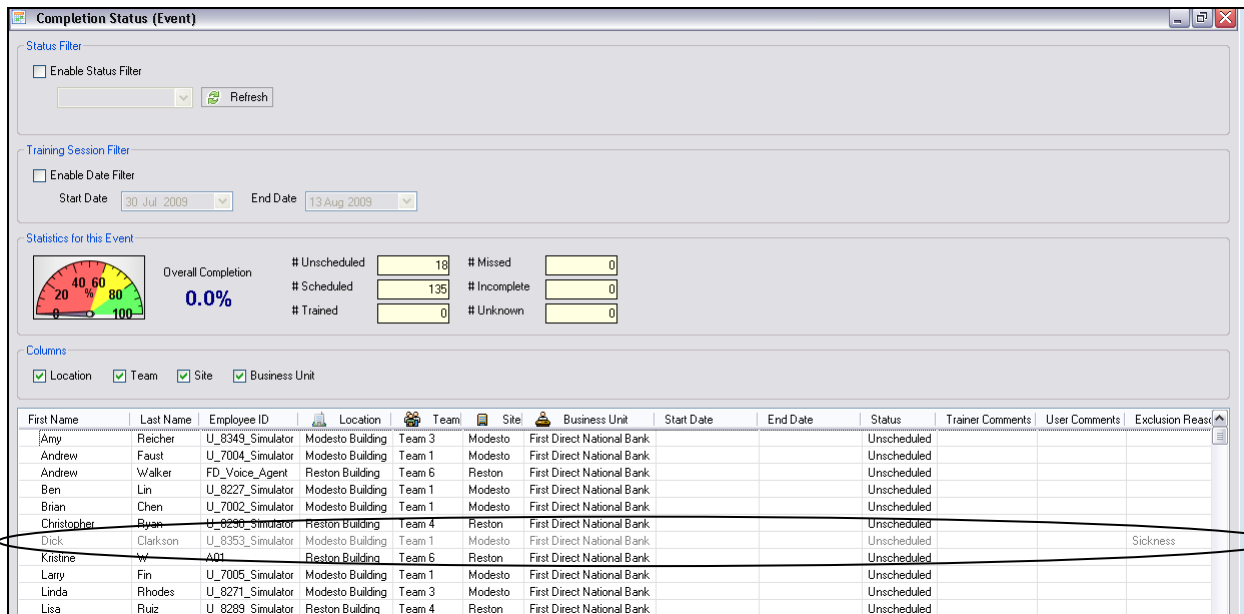
Removing a User from Exclusion

To remove a user from the exclusion list select the user from the exclusion list and right click selecting 'Remove'.

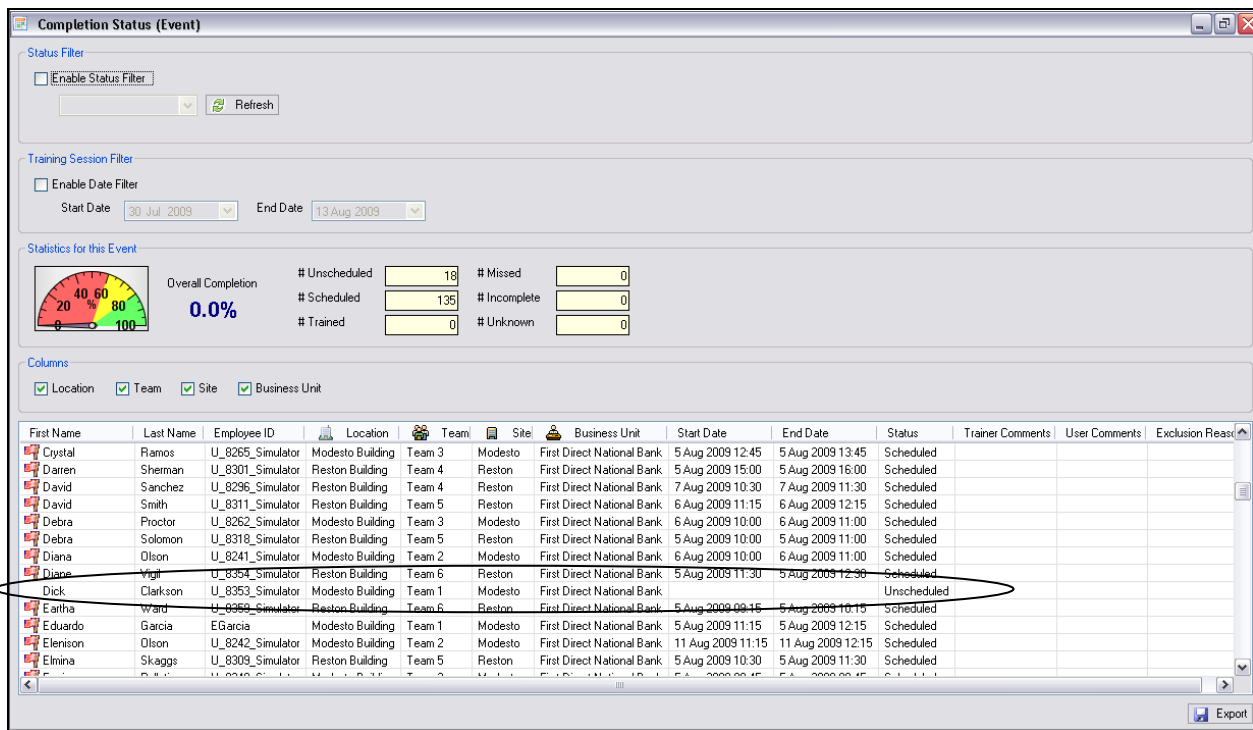


Completion Status Report View

The example below identifies the agent as being unscheduled with an exclusion reason of Sickness.



Once the agent has been removed from being excluded they will show as unscheduled and could be scheduled as a 'mop up' as part of the scheduling process.



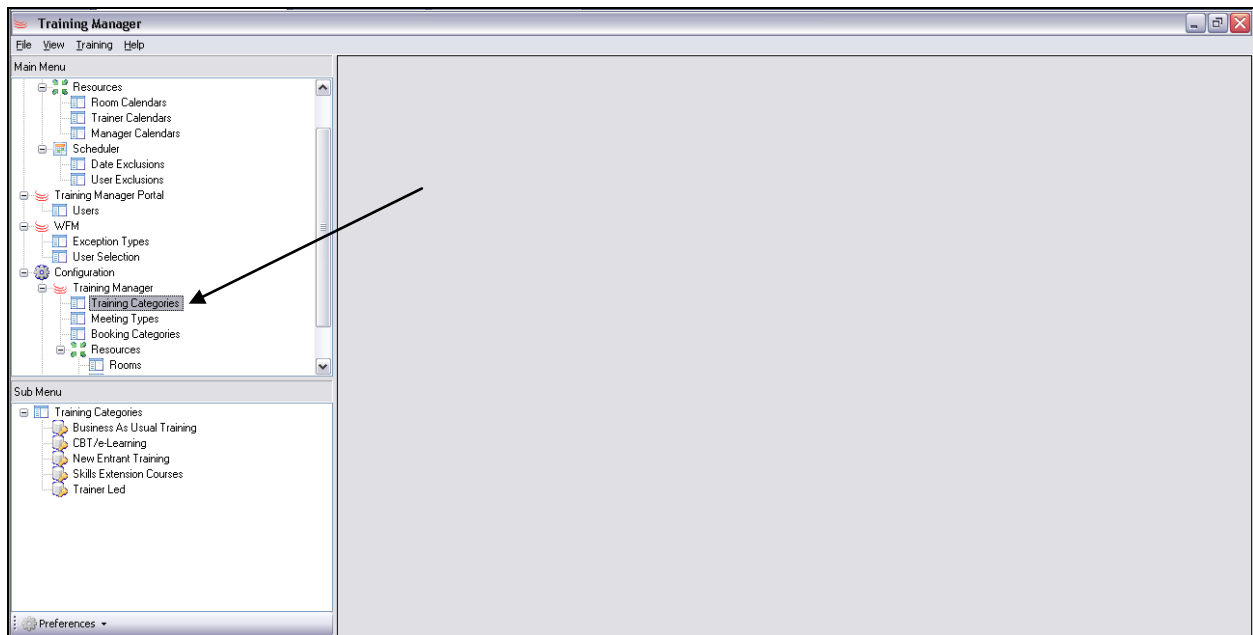
Configuration

Training Categories

The training categories are linked to the exception codes in Genesys WFM and a training category has to be selected when raising a training request. When training is scheduled it is the exception code that is displayed in the agent schedules and therefore has to 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.

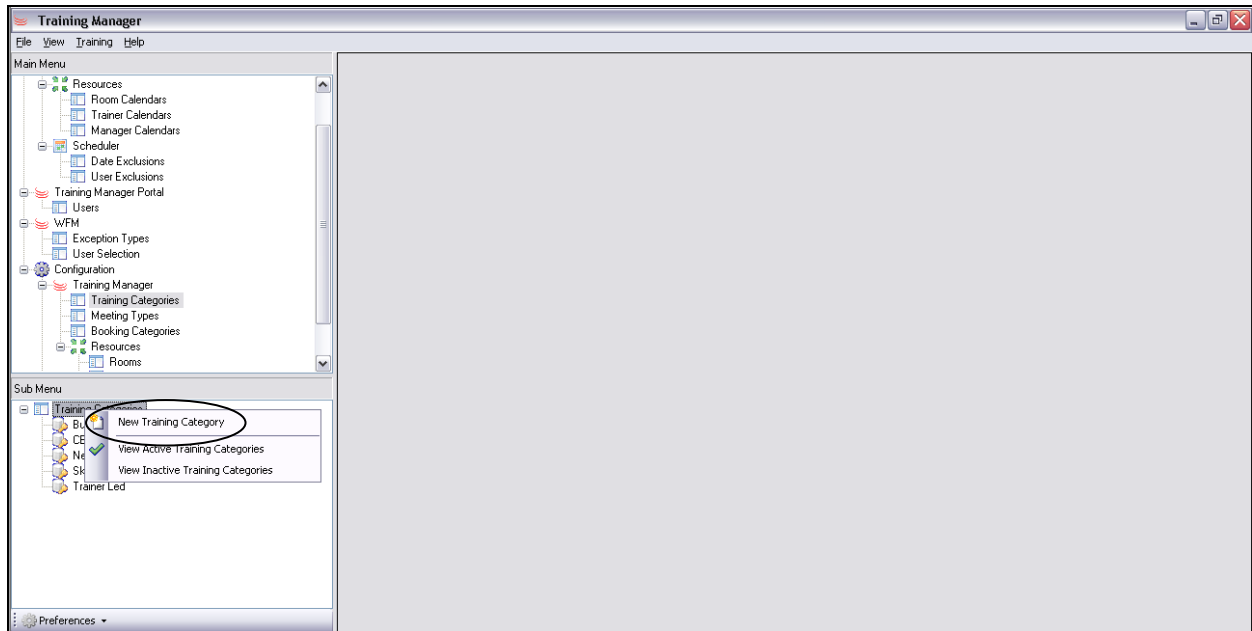
To create a new training category, select 'Training Categories' from the Main Menu and a list of existing categories appears in the sub menu.

Right click on 'Training Categories' in the sub menu and the 'New Training Category' option appears.



After clicking on 'Training Categories' any existing categories are displayed in the Sub Menu.

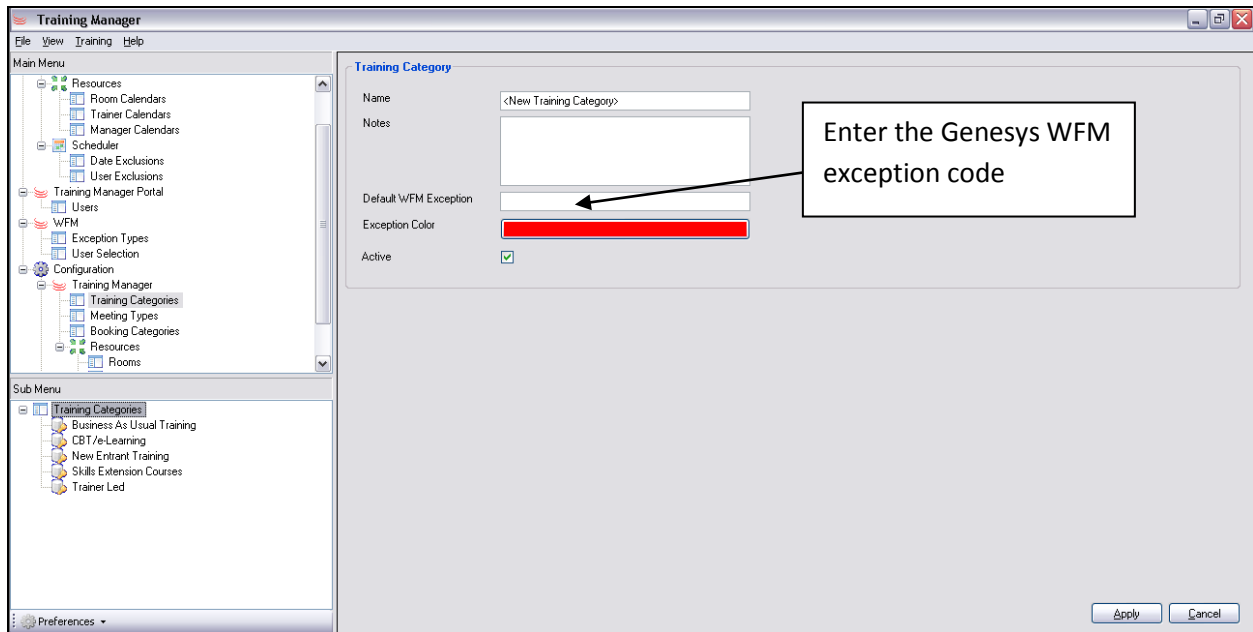
To create a new category right click on 'Training Categories' in the Sub Menu and select 'New Training Category'



Enter a new name together with any relevant notes.

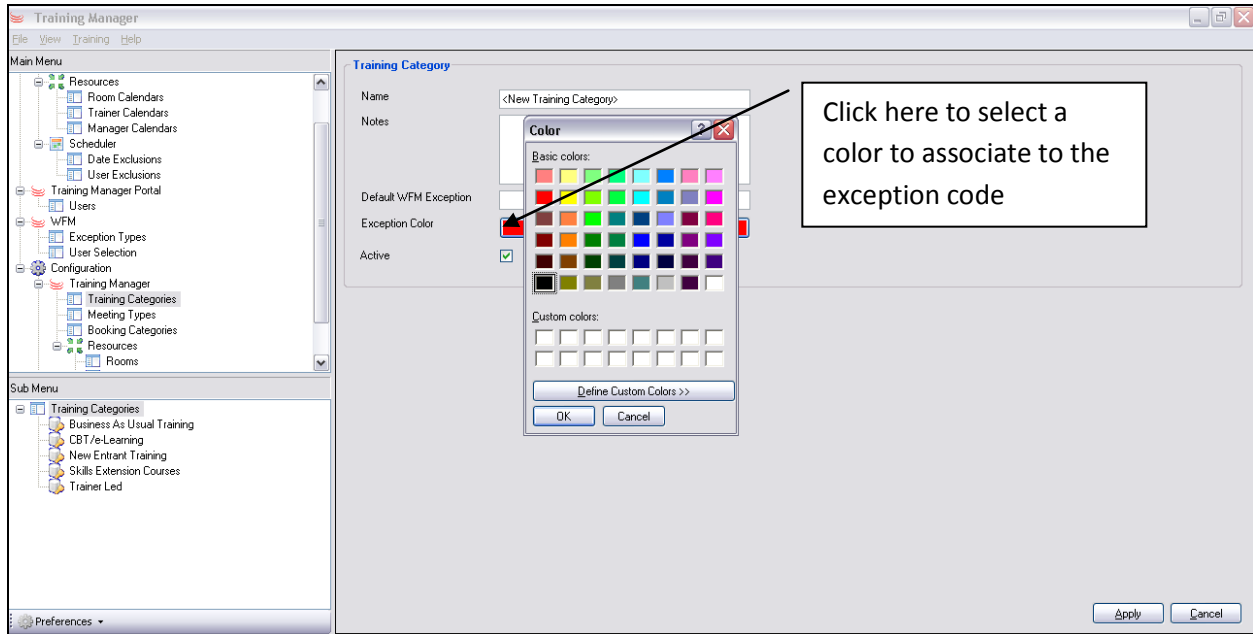
The 'Default WFM Exception' is the exception code that exists in WFM for this activity and this is entered exactly as it is in WFM. If the code does not match then the exceptions will not be created in WFM and an error will be generated by Genesys Training Manager.

Genesys Training Manager does NOT create exception codes in WFM.



The exception code color can be customized by clicking on the exception code box and selecting a new color.

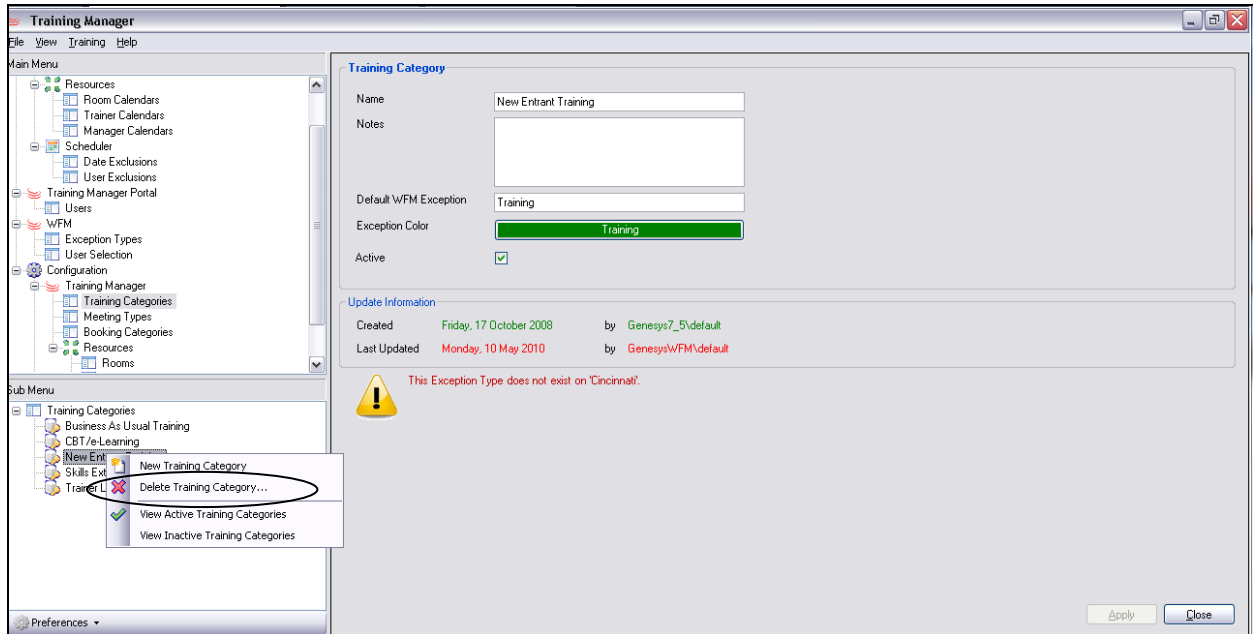
Note: Ensure that the color assigned does not clash with an existing color in Genesys WFM as this could be confusing from an activity monitoring perspective.



Training categories are individually identified as specific exceptions within Genesys WFM and have an associated exception code and color within the Agent schedule. The category identification can also help with prioritizing training.

Deleting a Training Category

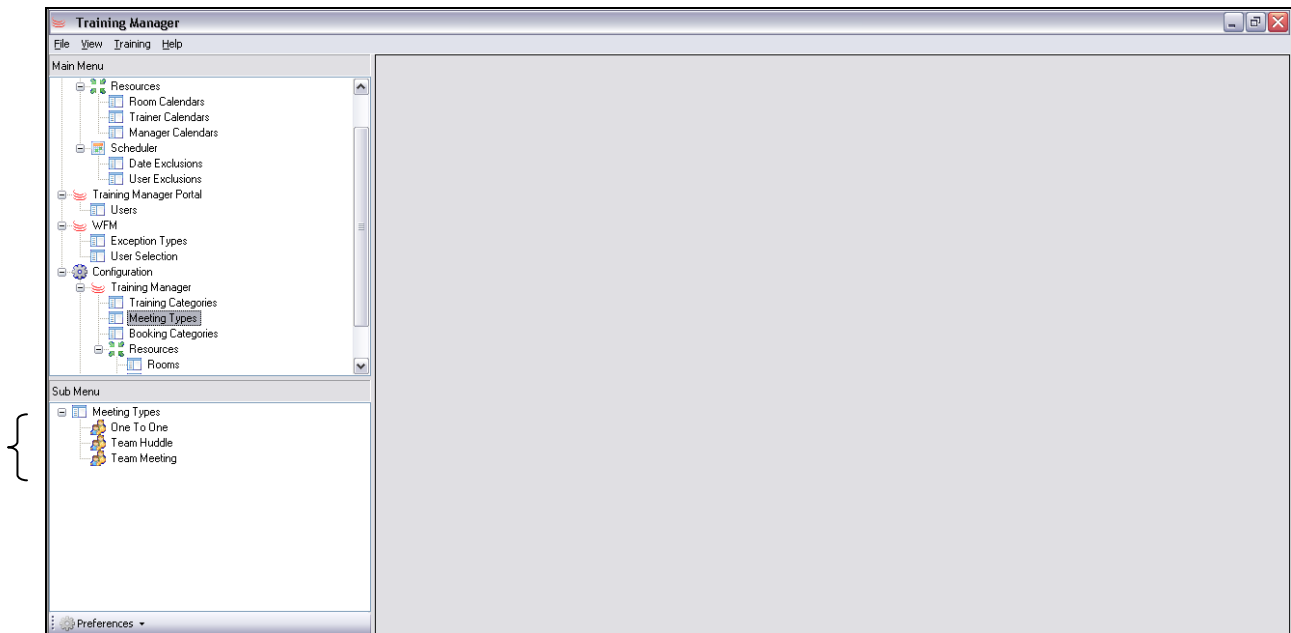
To delete training category in Genesys Training Manager right click on the training category and select 'Delete Training Category'.



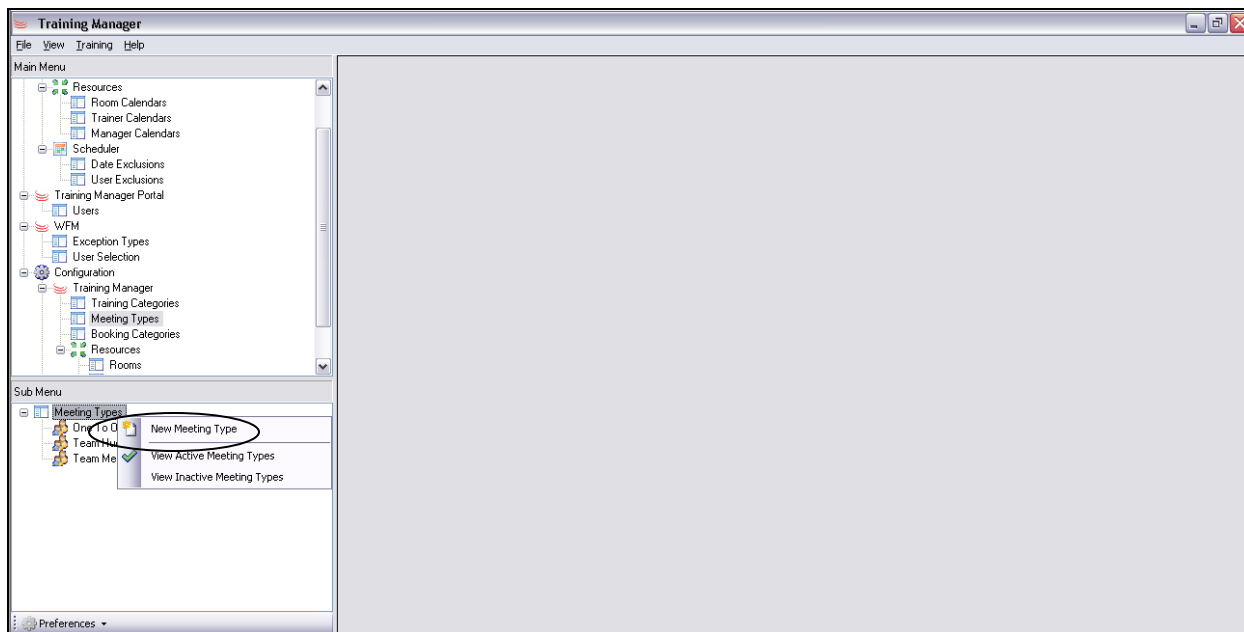
Meeting Types

Meeting Types are used only when creating and scheduling Meetings and One to Ones which include the team manager. Different algorithms have been created to manage a team group meeting or individual agent and team manager and these algorithms have to be associated to the right meeting type.

Select Meeting Type from the Main Menu and any existing meeting types are visible in the Sub Menu.



To create a new meeting type right click on 'Meeting Types' in the Sub Menu and select 'New Meeting Type'



Complete the details as required selecting the correct booking algorithm from the pull down box:

- Meeting = Group
- One To One = agent and team manager.

As per Training Categories used in training requests the WFM exception code has to already exist in WFM and exactly match the 'Default WFM Exception' code entered.

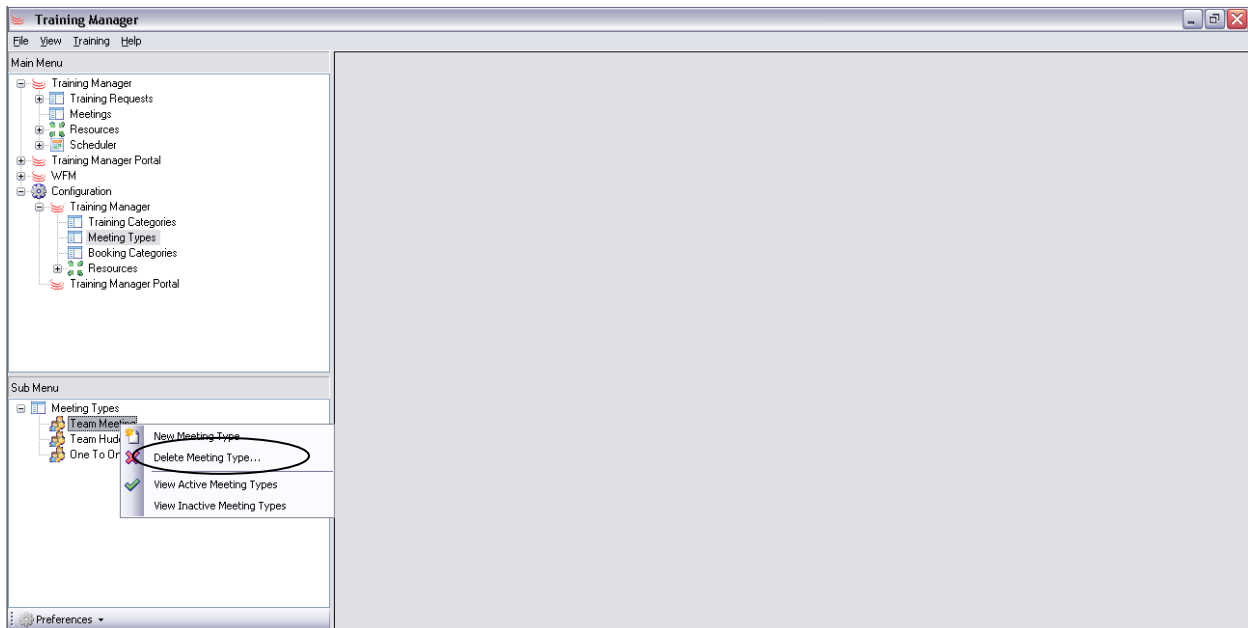
A color can be selected for the exception to be visible in the agents WFM schedule.

Select the correct booking algorithm

The WFM code has to exactly match the existing WFM exception code

Deleting Meeting Types

Delete a Meeting Type by right clicking on the meeting type and selecting 'Delete Meeting Type...'

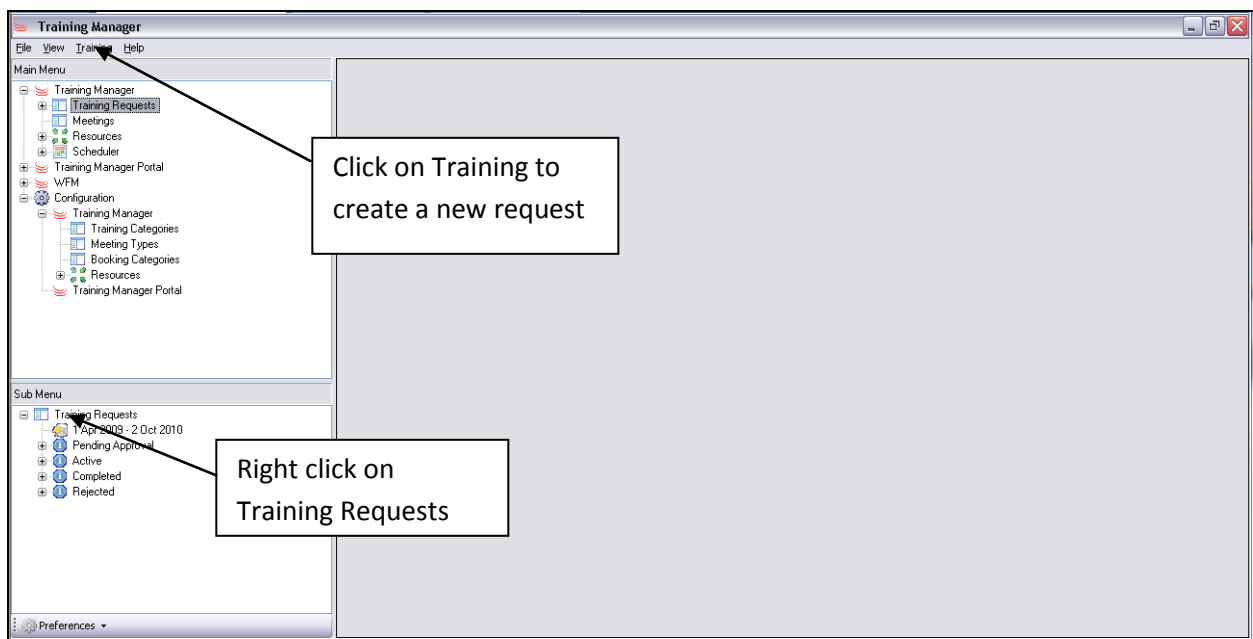


Raising a Training Request

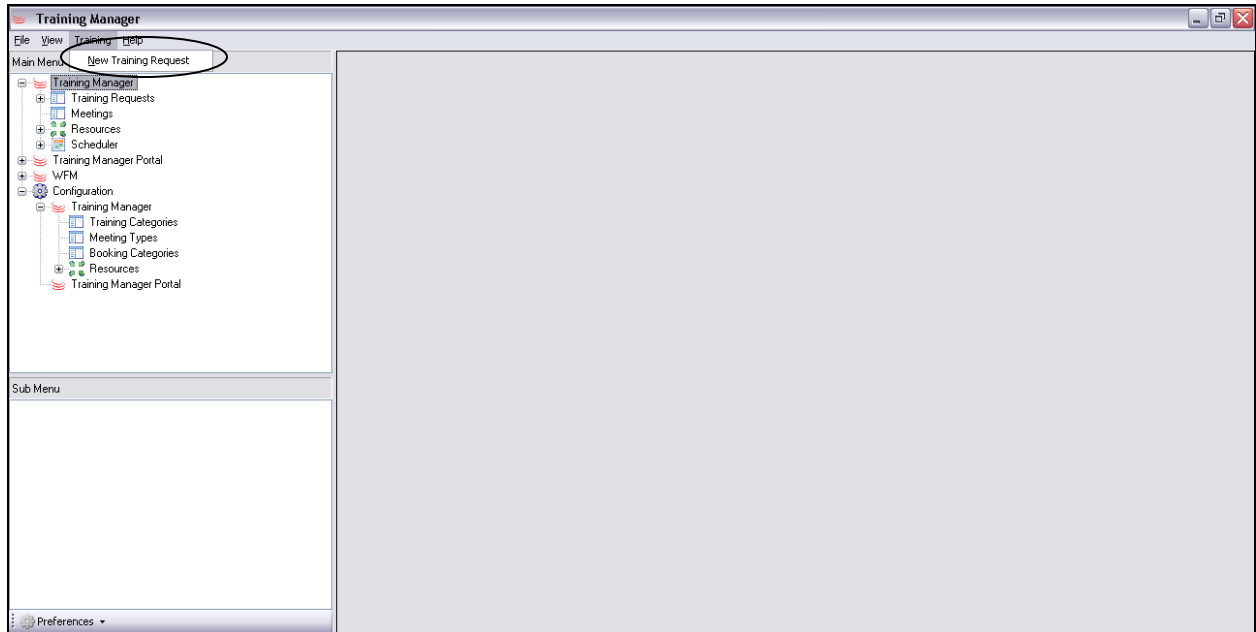
To raise a training request, select 'Training Request' from the Main Menu and the training request status menu will appear in the Sub Menu.

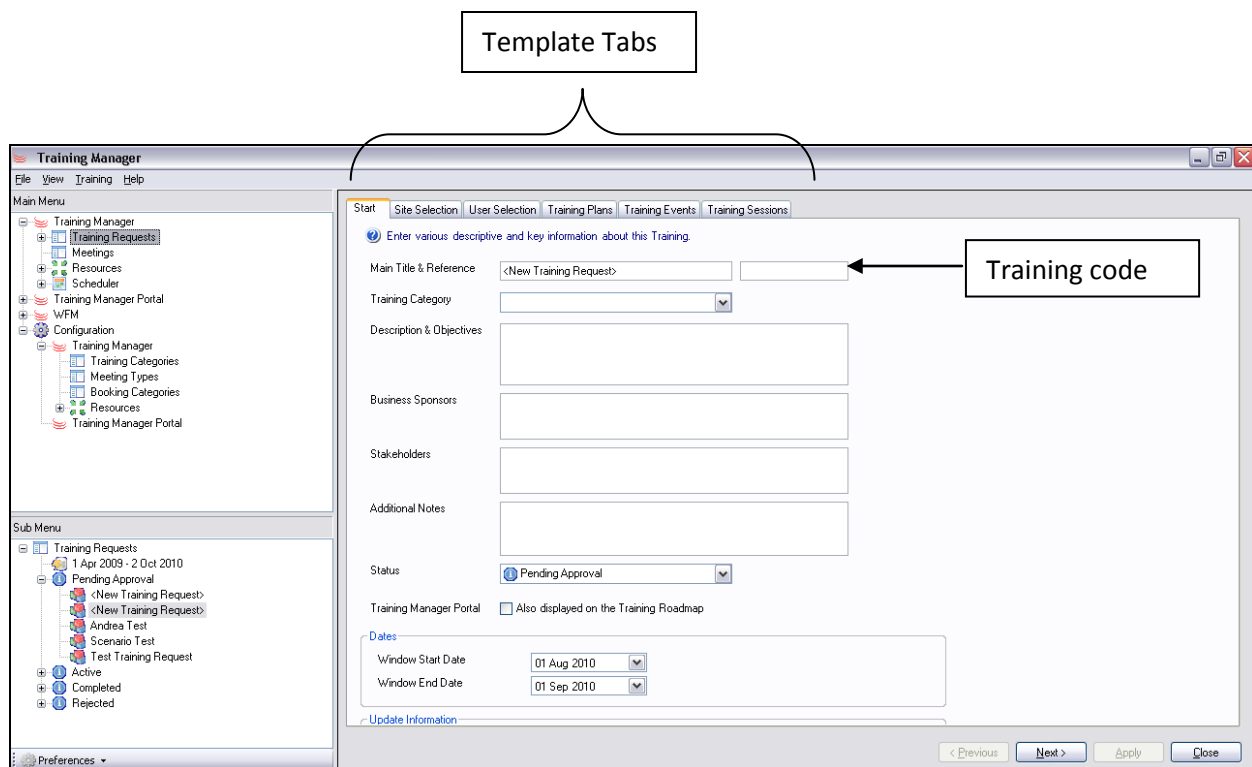
Training requests can be created by either right clicking on 'Training Request' in the Sub Menu, or on the Training option above the Main Menu.

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



When the 'New Training Request' option is selected, the template will then appear see the example on the next page.





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

Start Tab

Main Title and Reference – enter a title and the box at the right hand side requires the training code.

Training code – is the code associated to the training.

Training Category – identifies the category of training and which exception code will be visible in WFM.

The categories are available from a drop down box.

Description & Objectives – this should contain information relevant to the training.

Business Sponsors / Stakeholders / Additional Notes – any information can be entered here that is relevant to the Training Request.

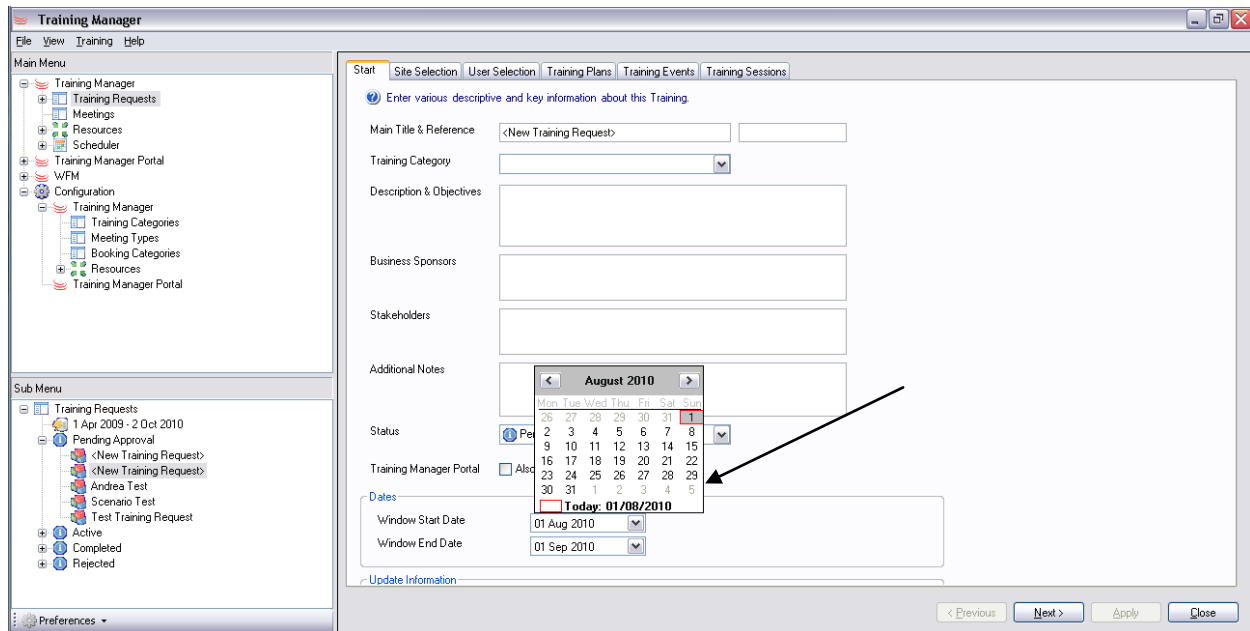
Status – There are four options available from the pull down box:

- 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 into Genesys WFM and is ‘good to go’. For a training request to be visible in the web portal the training request has to be shown as ‘Active’ and have ‘Displayed on the Training Roadmap’ selected.
- Completed – a training request is moved into ‘Completed’ once it has been completed.
- Rejected – where a training request has either been rejected or cancelled.

The screenshot displays the 'Training Manager' application window. On the left, there is a 'Main Menu' and a 'Sub Menu' tree. The 'Sub Menu' is expanded, showing a list of training requests with their status icons: Pending Approval, Active, Completed, and Rejected. The main area of the window is titled 'Start' and contains a form for creating a new training request. The form includes fields for 'Main Title & Reference', 'Training Category', 'Description & Objectives', 'Business Sponsors', 'Stakeholders', and 'Additional Notes'. The 'Status' dropdown menu is open, showing the four options: Pending Approval, Active, Completed, and Rejected. An arrow points to the 'Pending Approval' option. Below the status dropdown, there are 'Dates' fields for 'Window Start Date' (01 Aug 2010) and 'Window End Date' (01 Sep 2010). At the bottom of the form, there are buttons for '< Previous', 'Next >', 'Apply', and 'Close'.

The training window dates will display one month from today's date. This can be manually changed and training will only be scheduled within this window.

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



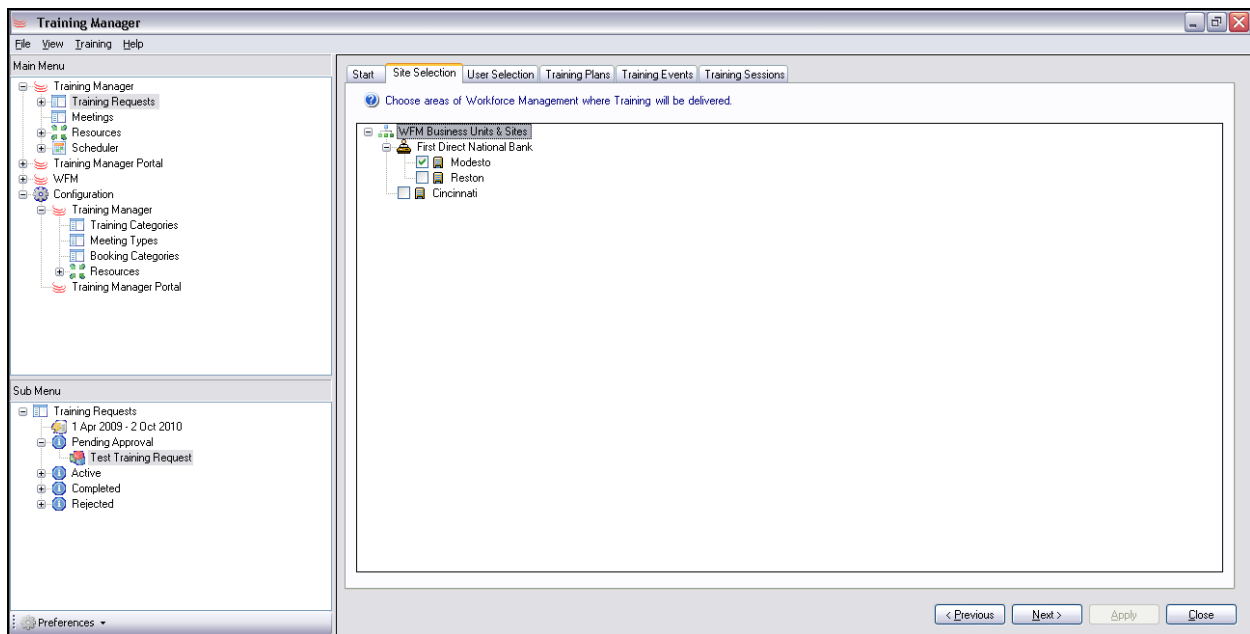
Once all of the information has been completed select 'Apply' or the 'User Selection' tab to move to the next stage.

Site Selection

This is where the Site or Scheduling Pot is selected (and there can be multiple selections).

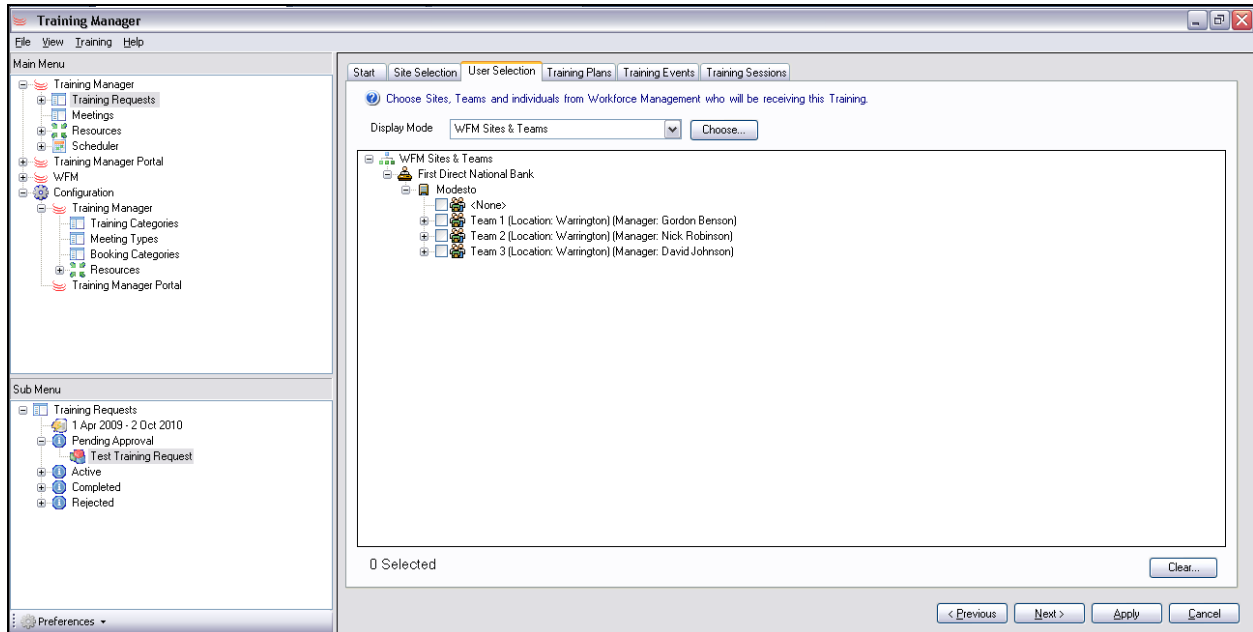
In the example below there are two Sites, or Scheduling Pots, Modesto and Reston. Modesto has been selected by right clicking in the box at the left hand side.

Once the 'Site' or 'Scheduling Pot' has been selected, the teams and activities associated to the site(s) will be available for selection in the next stage.



User Selection

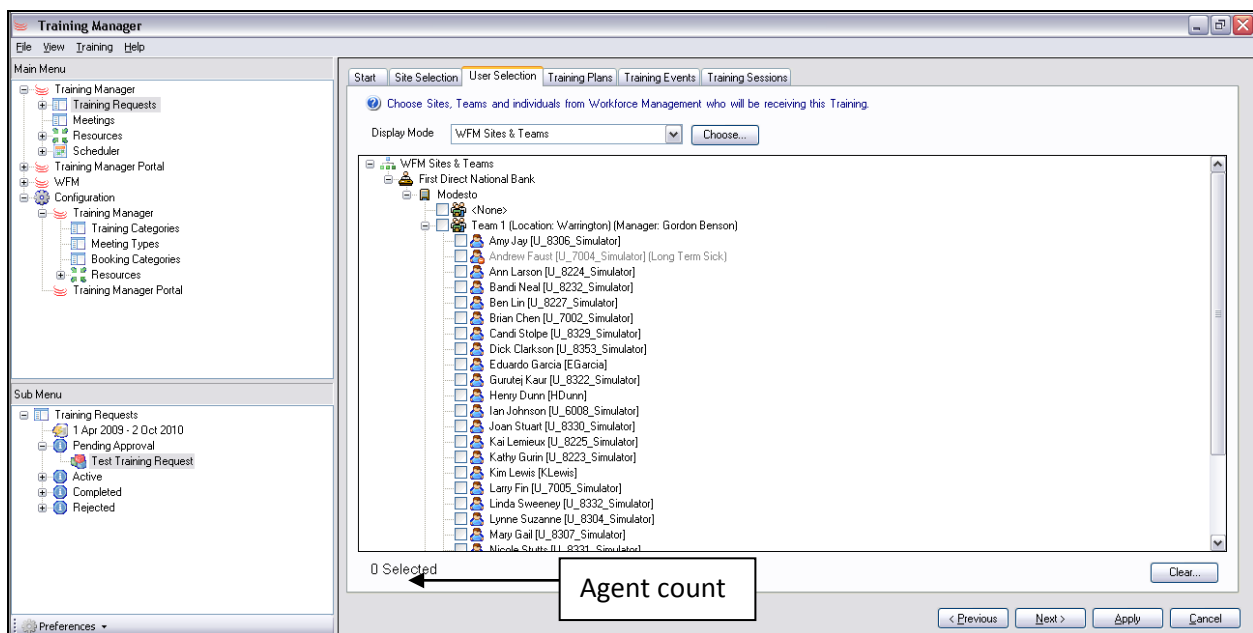
The User Selection tree view is pulled directly from Genesys WFM in its architectural format which is why Genesys is represented at the top level.



Team or Individual

By expanding one of the Team entries (in the example below Customer Services (Warrington) is selected), this lists all of the users associated to that 'Team'. Users can then be selected as individuals by clicking in the left box at the side of the individual required, or right click in the box against the Team name, for example, Customer Services (Warrington) to select all.

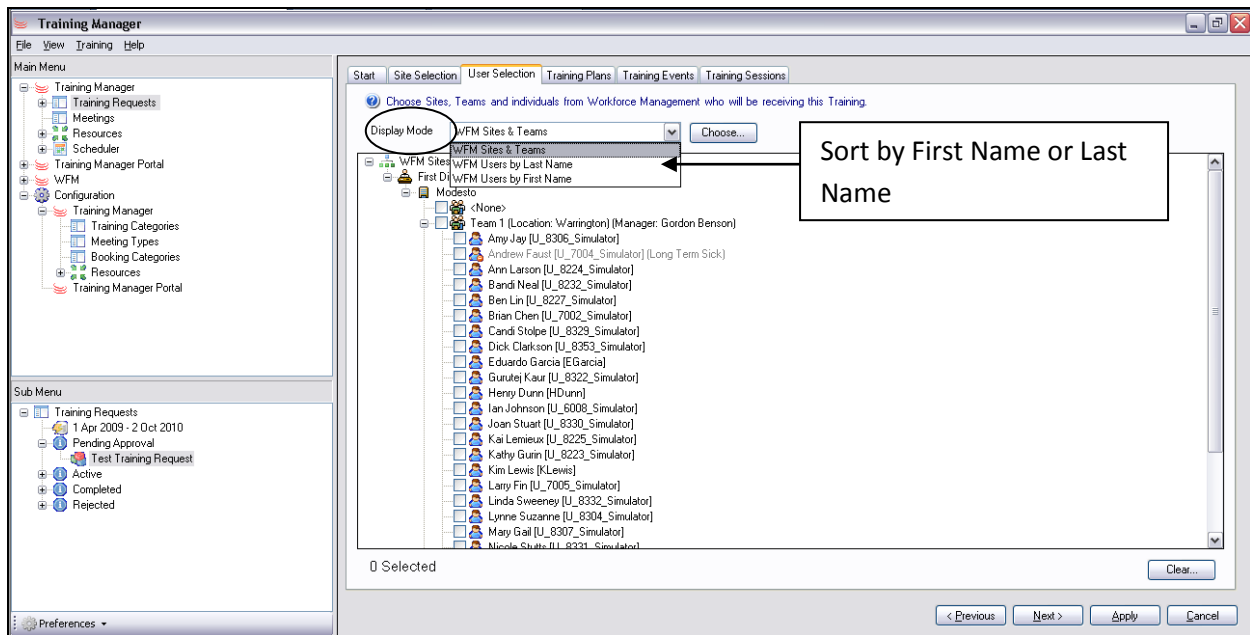
Once users have been selected, the application gives a count of the number of agents selected at the bottom of the window.



Last Name or First Name

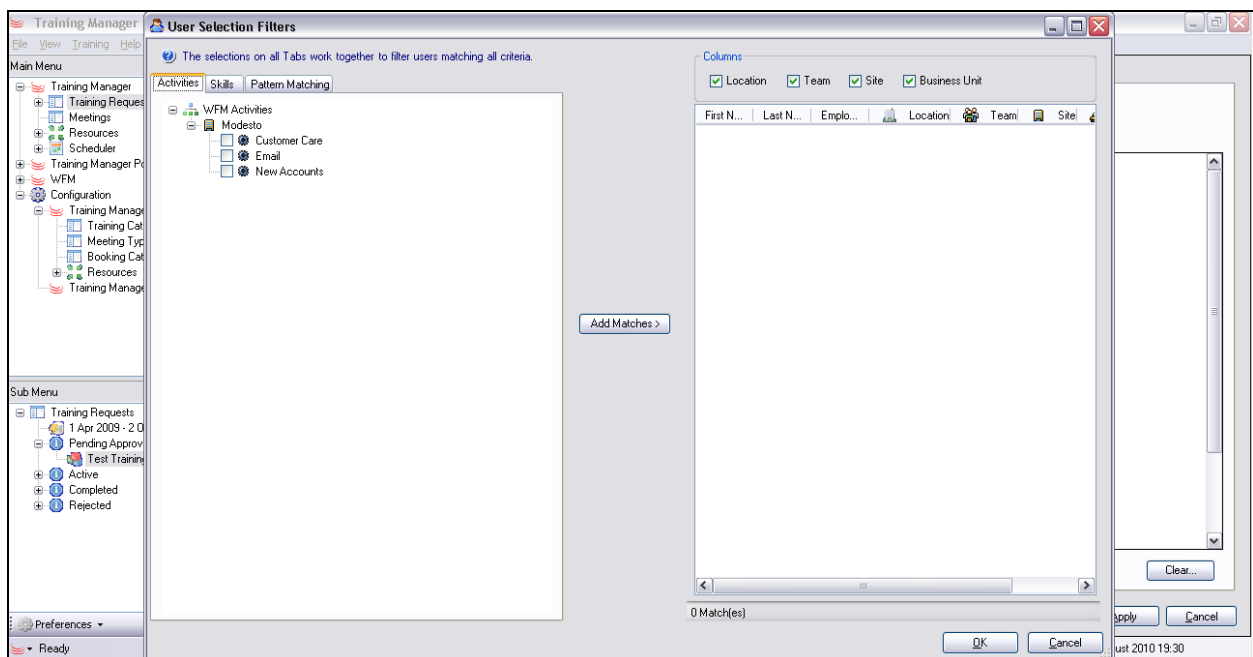
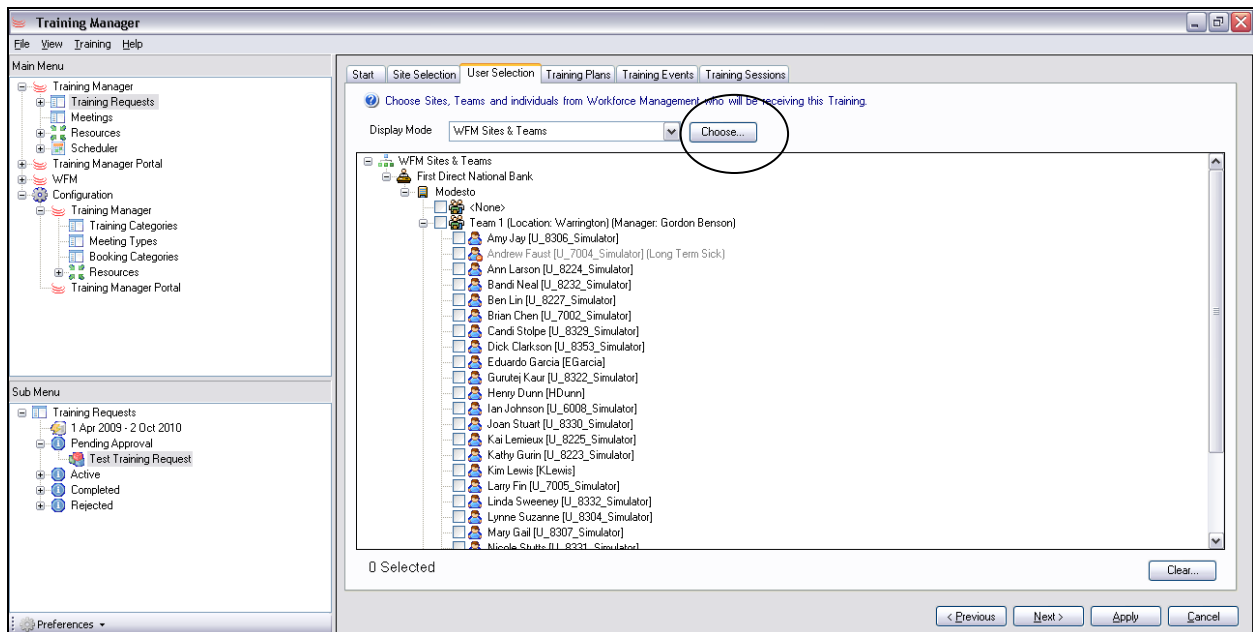
Another option is to filter the user list by 'First Name' or 'Last Name' and then select the users individually from the list presented.

To change the user view, there is a pull down box in 'Display Mode'.



Activity

The option to select agents by 'Activity' is available by selecting the 'Choose' option and the 'User Selection Filter' screen appears, as per the example at the bottom of the page.

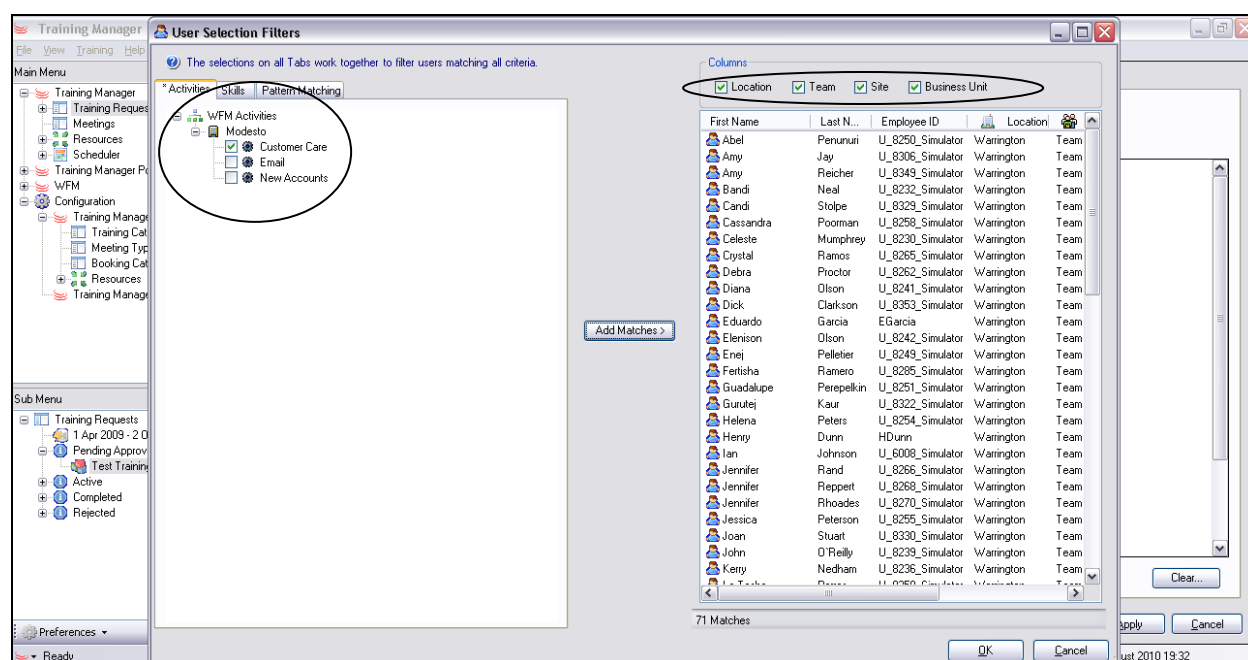


‘Activities’ are the Activity sets in Genesys.

In the example below there are 3 Activity sets, Customer Care, Email and New Accounts. If training is to be delivered to agents who have a specific ‘Activity’ in their Genesys WFM profile then this filter will allow the selection of those agents.

By selecting an activity and then ‘Add Matches’ the agent names are presented in the right hand window together with an agent count at the bottom of the window.

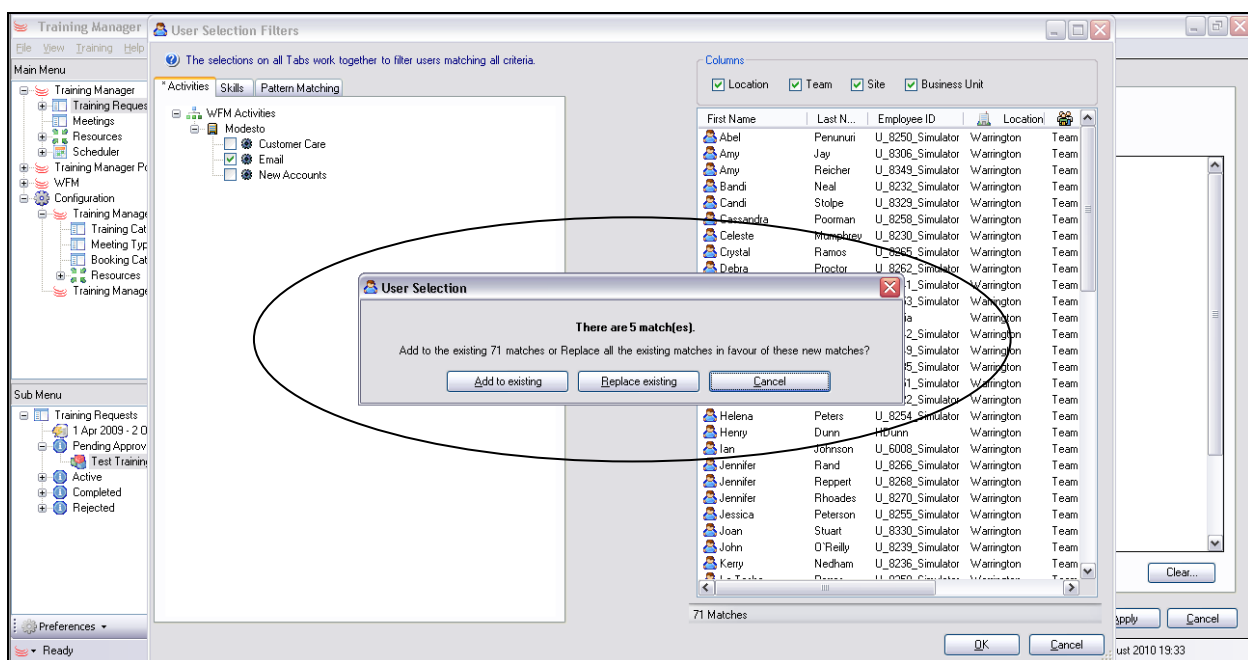
There are options to view the users selected by Location, Team, Site and /or Business Unit.



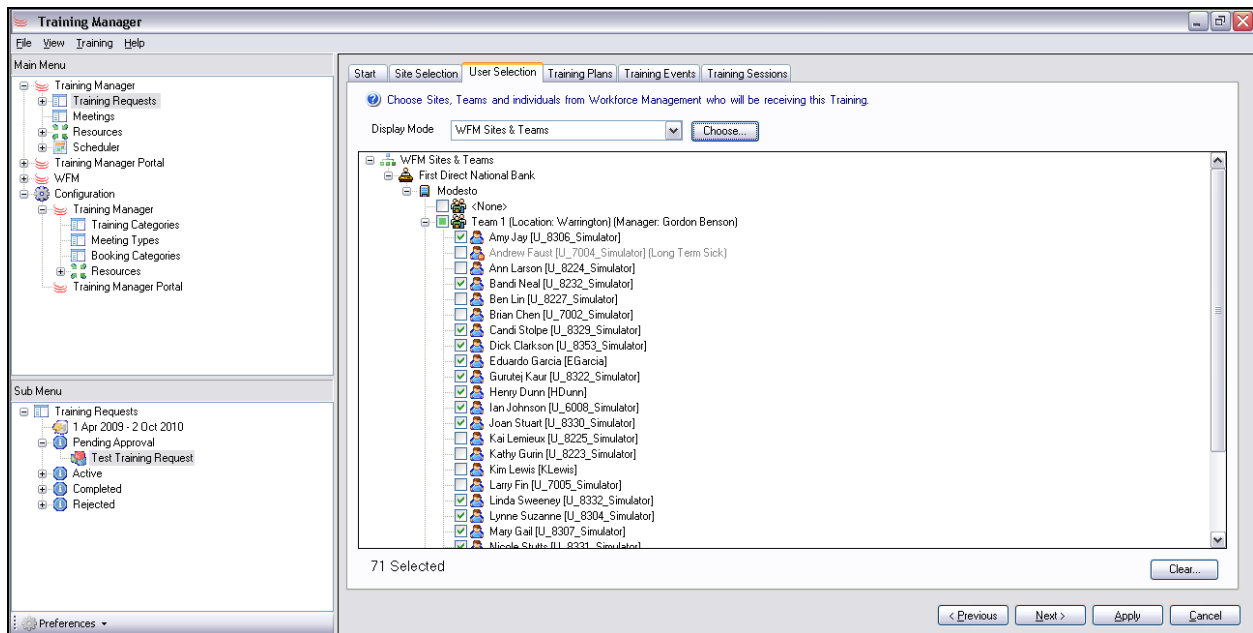
Additional activities can be included within the User Selection list by selecting an additional activity from the drop down list, remove the original selection first and then click on 'Add Matches' this will bring up an additional window that allows you to:

- Add to existing – Add any agents that are not already in the user selection list.
- Replace existing – Only show the 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.



Once OK is selected this will display the users in the user selection tree. See the example below.

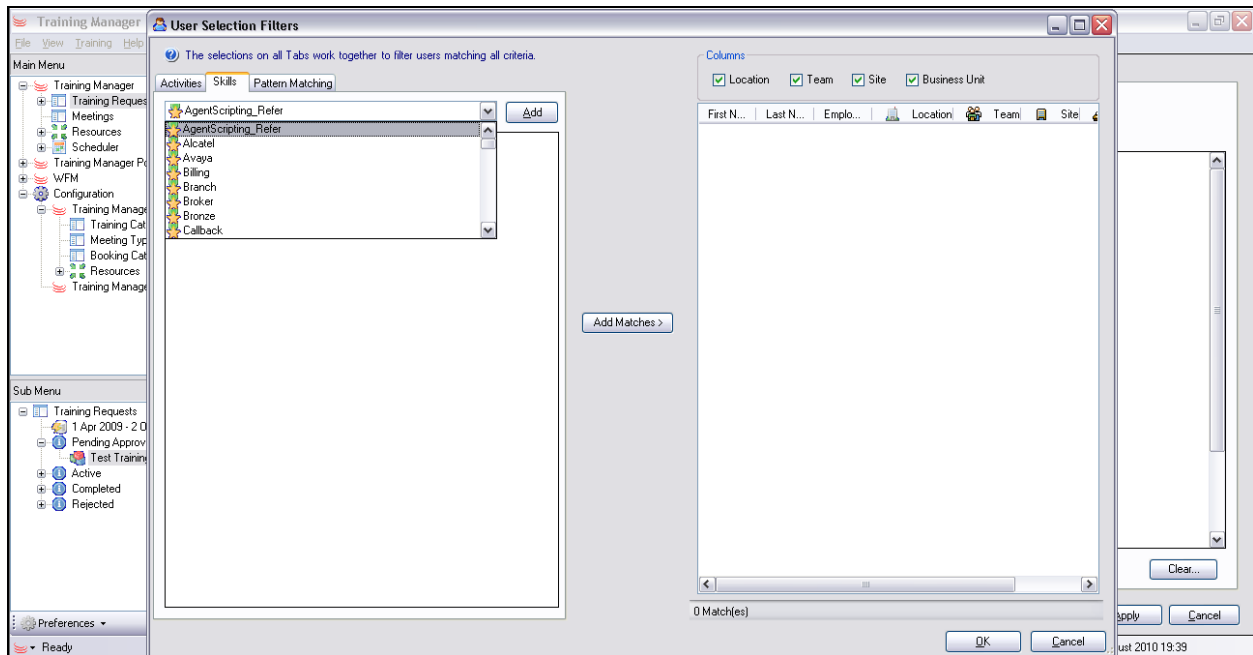


Skill and /or Proficiency Level

The second option in the 'Choose' menu is Skills.

Skills identify the call types and users can be selected by their 'Skill' and their level of proficiency.

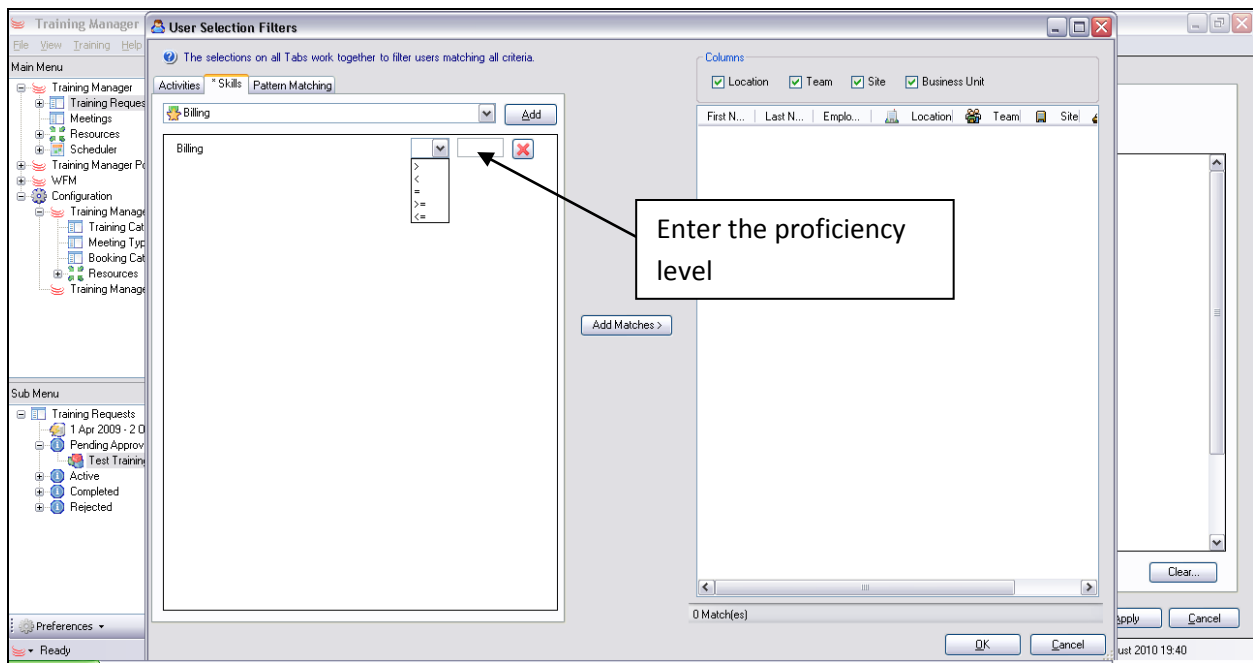
Select 'Skills' and a drop down box will appear with all of the Skills in Genesys. Highlight the relevant skill and select 'Add' (Multiple skills can be selected).



Once the skill has been selected additional filtering is then available.

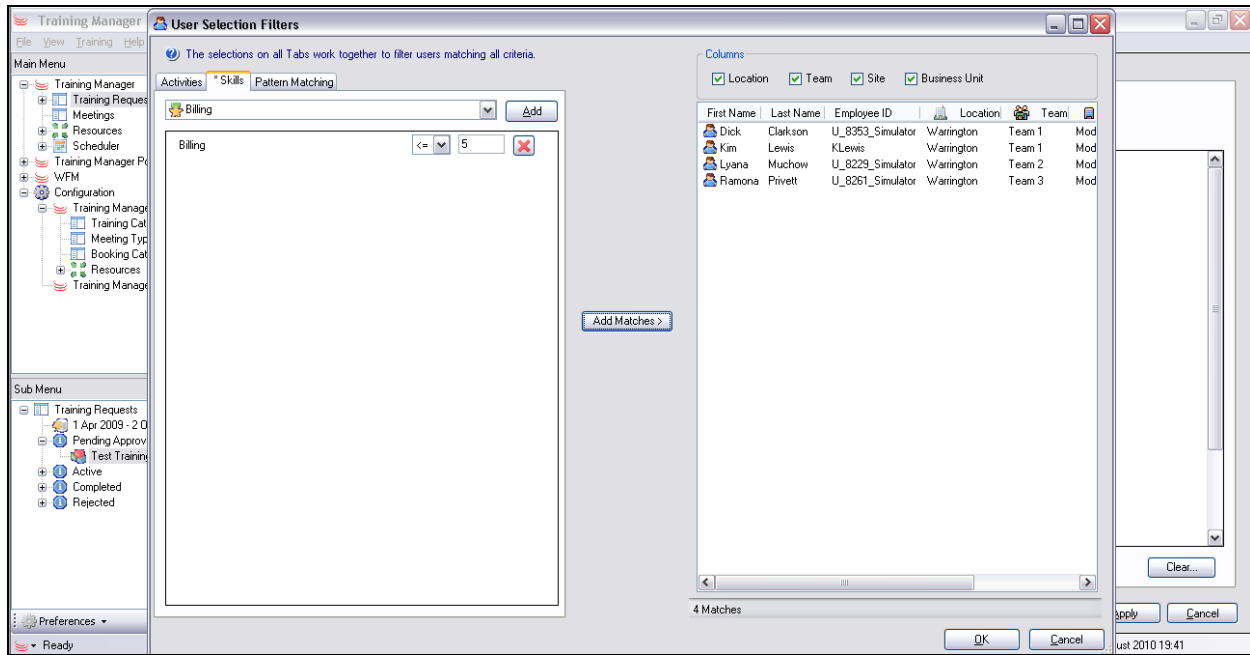
This allows Genesys Training Manager to select agents who have a proficiency level of $>$, $<$ or $=$.

In the box at the right hand side enter the proficiency level, for example, ≤ 5 for 'Billing' skills less than proficiency level 5.



Then select 'Update Matches' to identify the number of agents selected.

The individual agents are presented in the right hand side window. Select OK to return to the User Selection tab where the users are confirmed as selected.

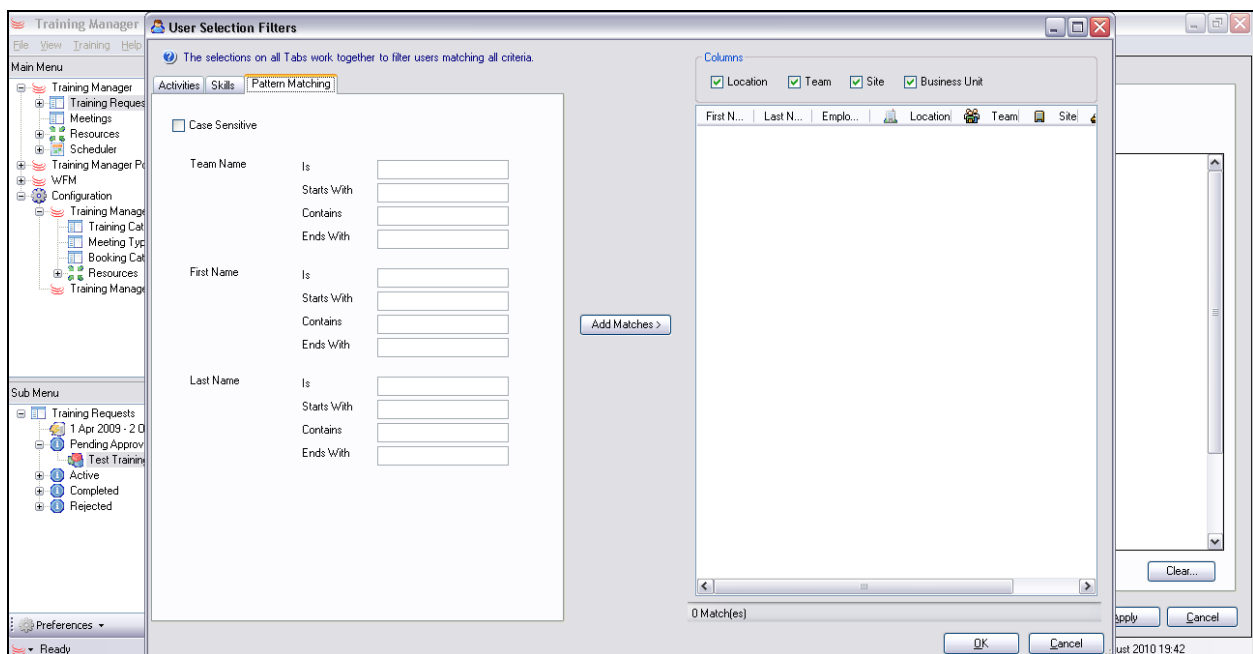


Pattern Matching

This allows for key word searching as per the example below.

Once agents have been identified and selected, update the agent count by clicking on 'Update Matches'.

The individual agents will then be visible in the 'User Selection' window.



Select OK and then 'Apply' and move on to the next tab.

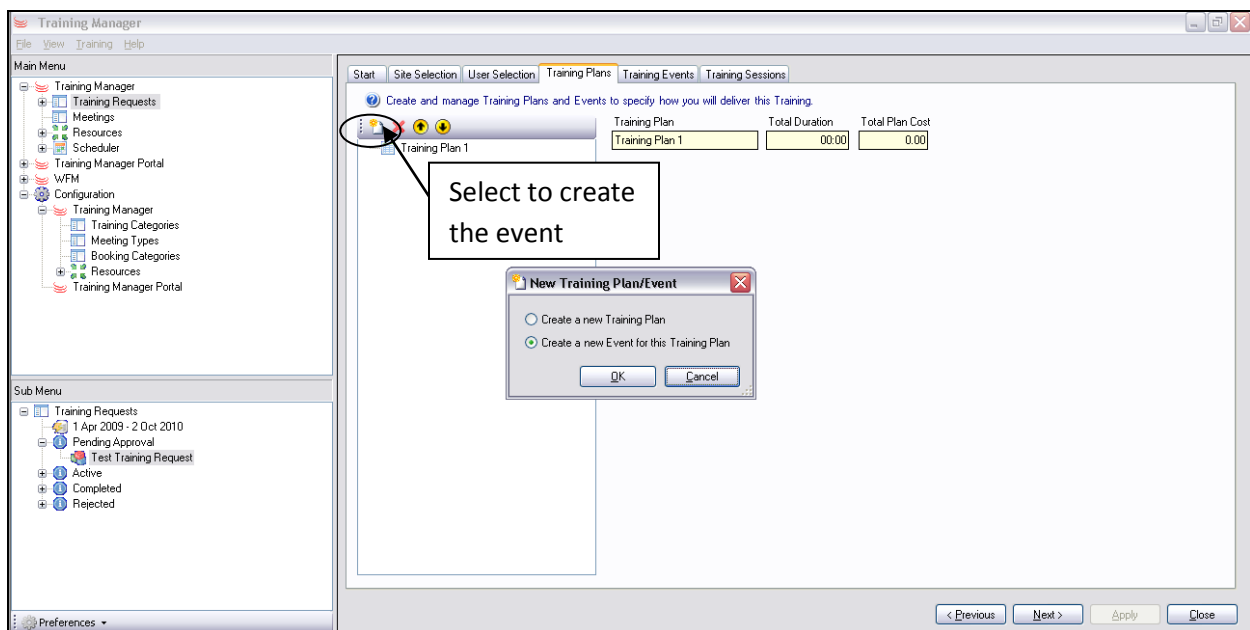
Creating Training Plans

This is where an event is created to associate to the training request. For example,

- Event 1 – On-Line Pre Assessment to identify individual training requirements

Once the training plan template is presented, select the new event or training plan icon for the option to create a new Event or Training Plan.

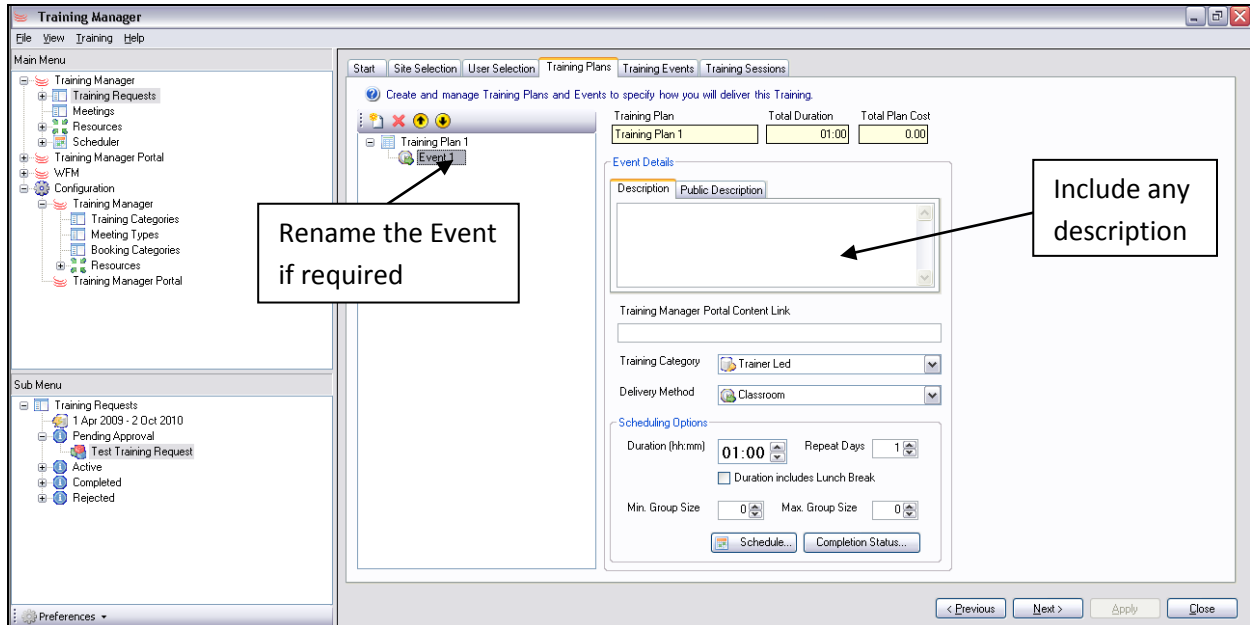
Rename the 'Event' for easy identification in reports and in the users' web portal view.



Select Ok and a new Training Plan template appears as per the example on the next page.

Creating a New Event

Once the new Event has been created, it can be renamed and a description can be included within the 'Event Details' box:



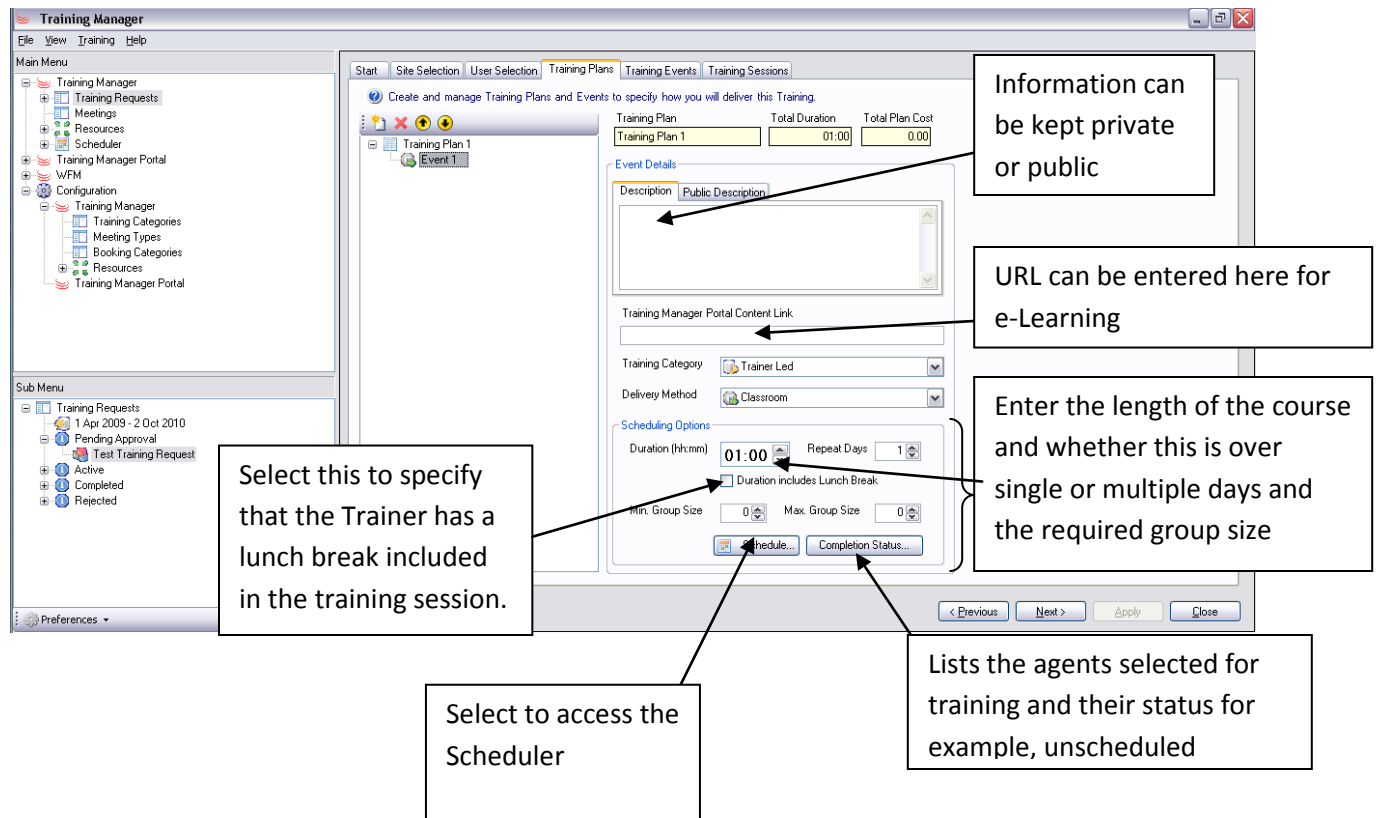
- **Description** – any information entered here is only visible in Genesys Training Manager
- **Public Description** – any information entered here will be visible in the web portal.

Web Portal Content Link – a URL can be entered here that will allow a user direct access into the web page through their web portal view.

Training Category is selected from a drop down box (the associated exception code and color will be published in Genesys WFM).

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

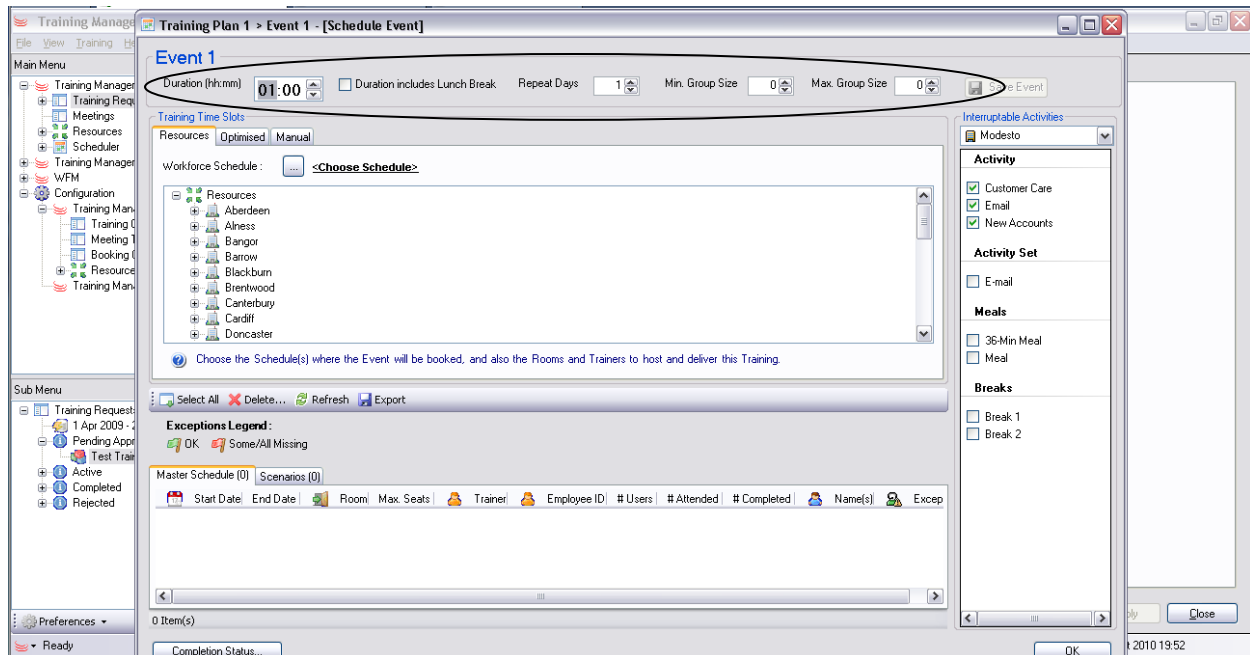
- **Classroom** – the agents will be scheduled in groups
- **e-Learning** – the agents will be scheduled individually.



Once all of the details are entered, select 'Schedule' and this presents the Scheduler.

The 'Scheduler' contains the 'Event Details' and the information is brought forward from 'Scheduling Options' in the 'Training Plan' tab. The training request name and training window are carried forward from the training request 'Start' tab.

If any information is changed in the template then the information has to be saved before continuing.



'Training Time Slots' Window

There are 3 tabs in the 'Training Time Slots' window:

- Resources
- Optimized
- Manual

Resources

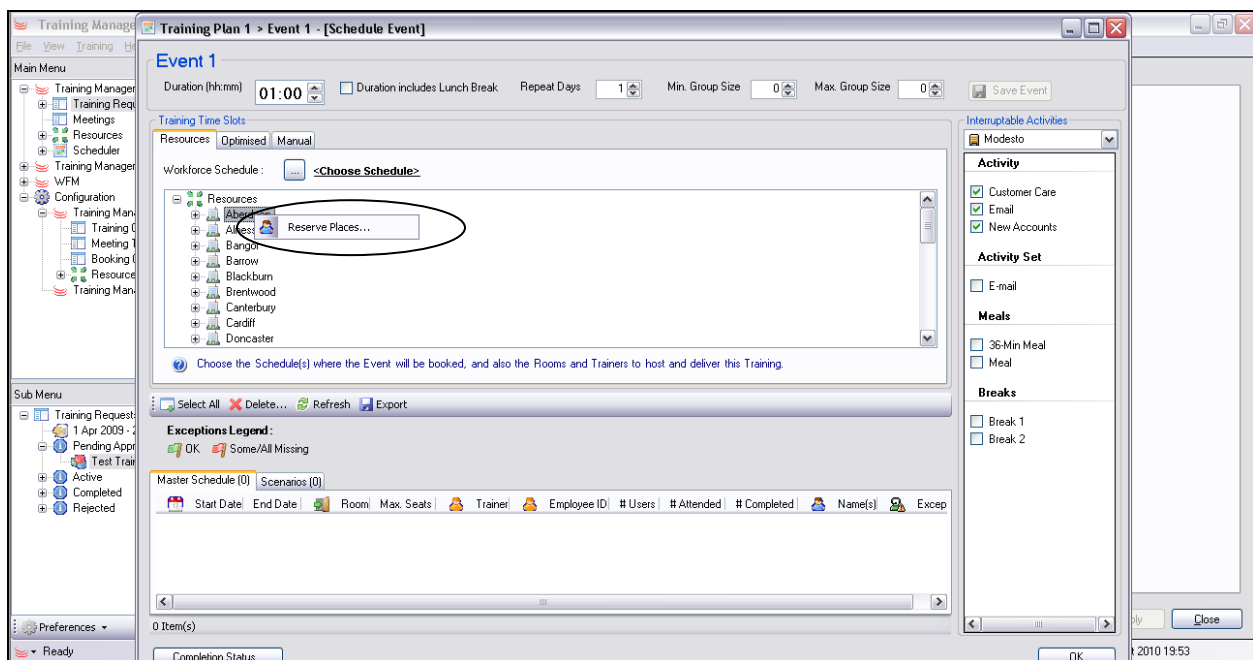
This is where the Rooms and Trainers are selected if there is a requirement for them to be scheduled as part of the training request.

Identify the location(s) for the training and the rooms and trainers associated to the location are made visible by expanding the location name; see the example for Warrington below.

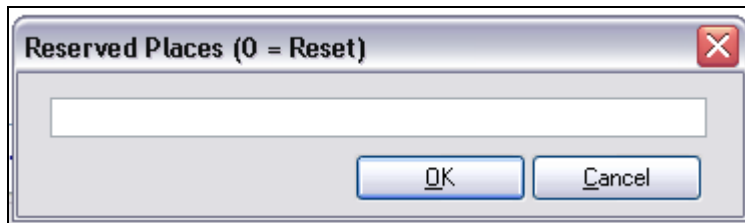
Select the Room(s) and Trainer(s) by clicking in the box at the left hand side.

If no Room(s) and / or Trainer(s) are required then nothing should be selected.

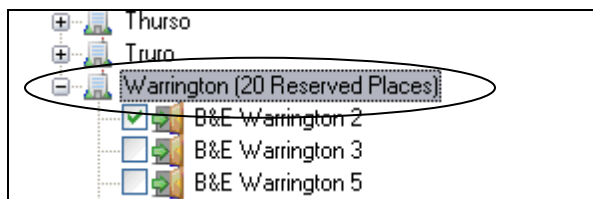
If there is only a requirements for reserving rooms, right click on the location name and select Reserve Places.



The option to enter a number of places is then available, enter 0 to remove any previously Reserved Places.



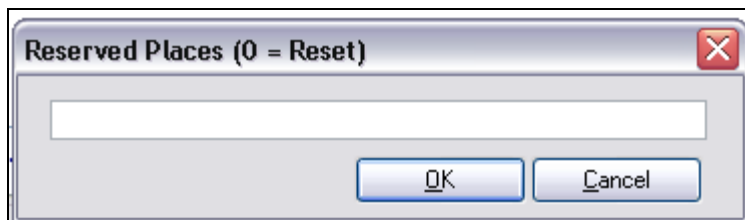
Enter the number of places and select OK. This will show against the location name.



Select the preferred Rooms by clicking in the left hand box against the room name and Genesys Training Manager will reserve room(s) up to the number of places requested as part of the scheduling process.

Don't forget to select the Rooms to be reserved and the trainers if required.

To remove Reserved Places enter 0 to reset.



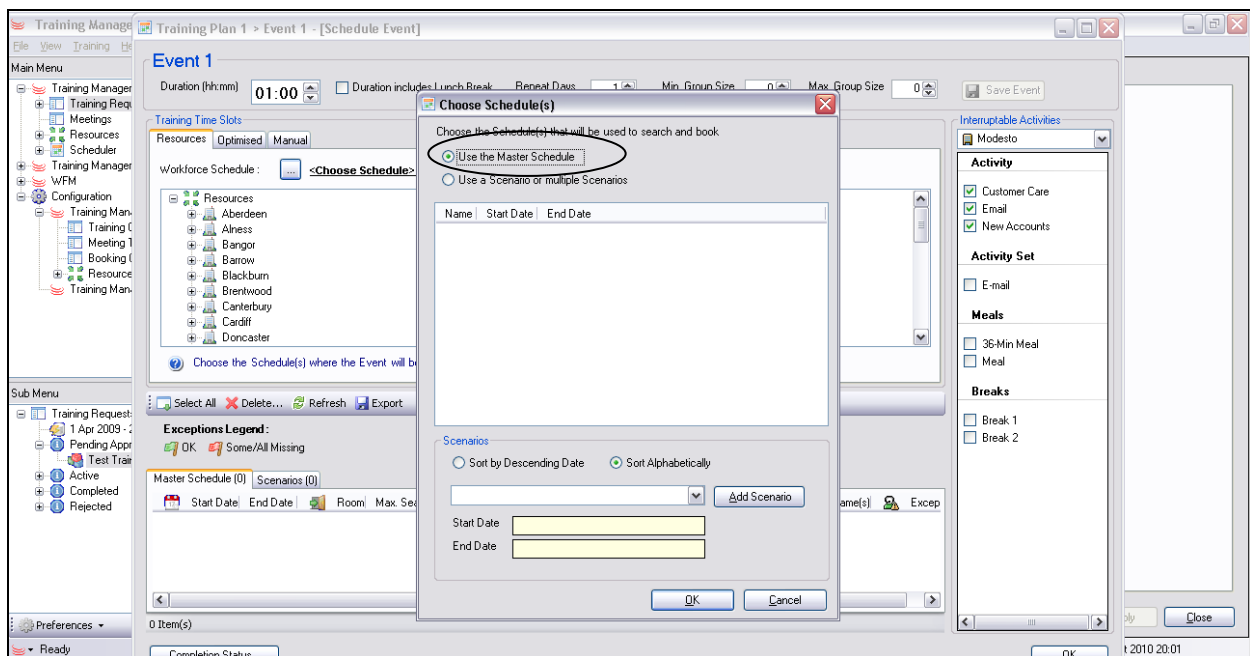
Workforce Schedule

This is where the Genesys WFM schedule is selected to schedule the training activity into.

There are two options:

- Use the Master Schedule (this is the 'live' schedule)
- Use a Scenario or Multiple Scenarios (this is where 'What If' schedules can be 'played with' without impacting the 'live' schedules)

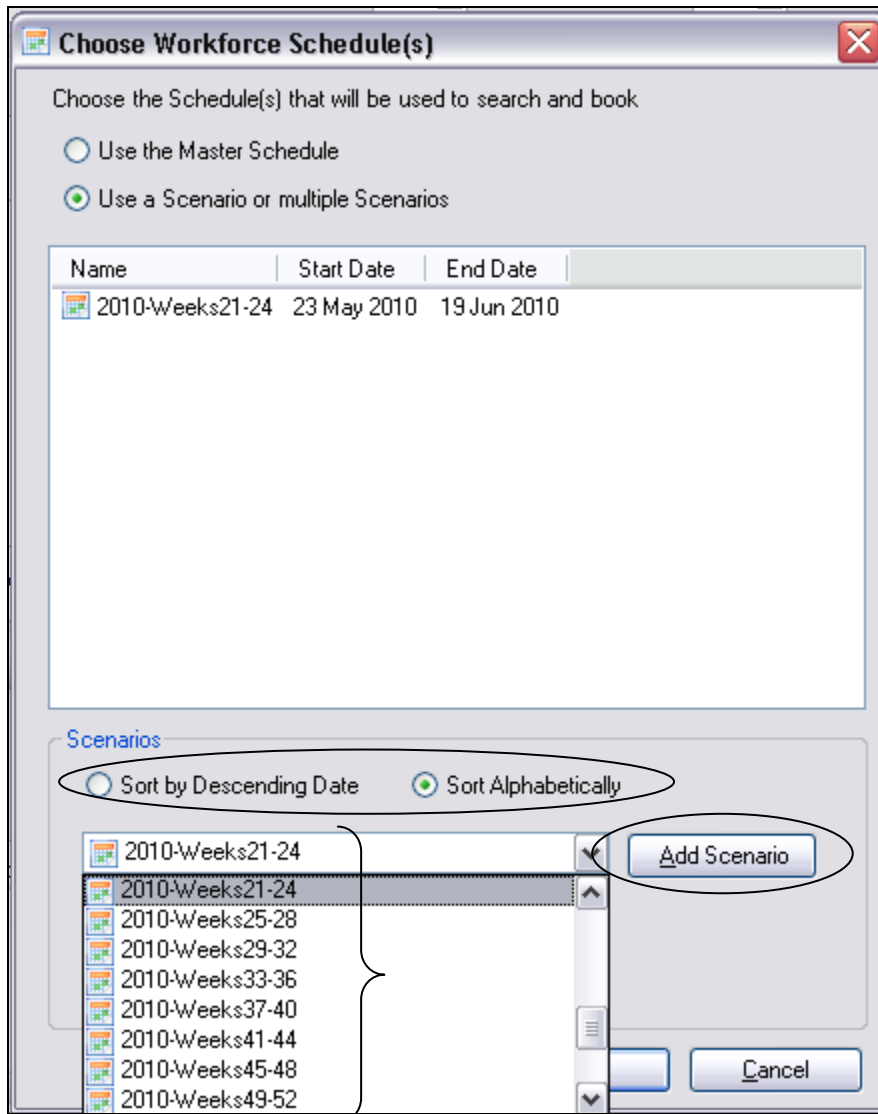
If 'Master Schedule' is selected this will schedule any training activity directly into the agent's live schedules.



If 'Scenario' is selected, the option to select the relevant scenario from a drop down list is presented.

Single or Multiple Scenarios can be selected to view the impact of the training activity by highlighting the scenario(s) required and select 'Add Scenario'.

Scenarios can be sorted by descending date or alphabetically.



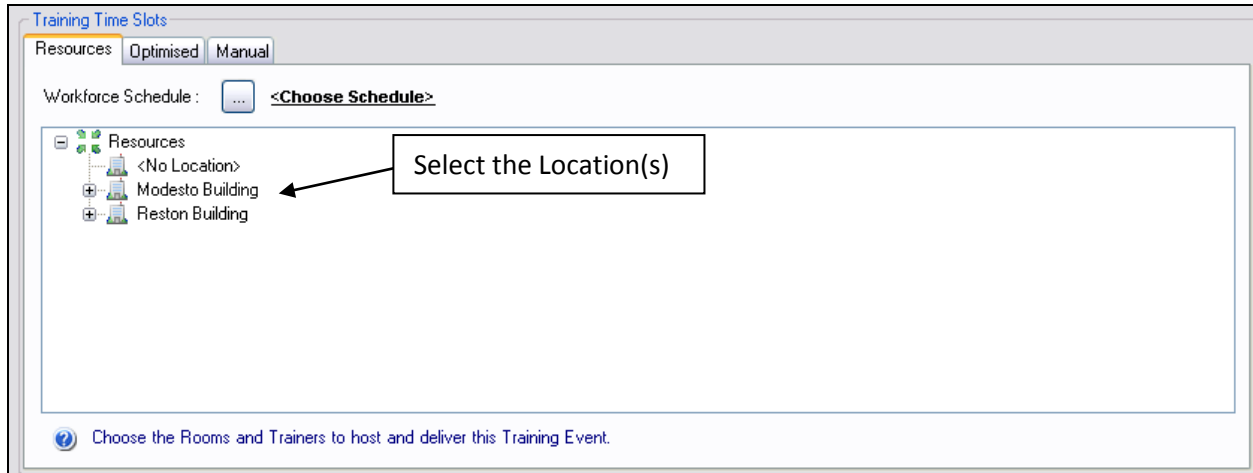
Genesys Training Manager will only schedule training activity into the Schedule or Scenario(s) selected.

Once the required Master Schedule or Scenario has been selected let's look at the different combinations of training that can be scheduled.

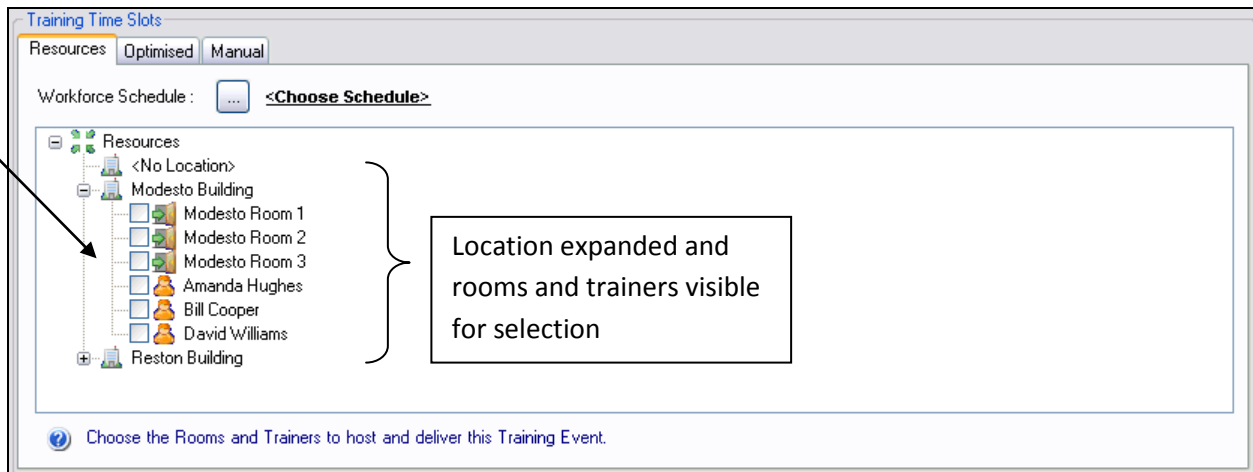
Genesys Training Manager can create any combination of Room, Trainer and Agent. The following pages will demonstrate some of the different training scenarios options available:-.

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.



Expand the tree view to view the Rooms and Trainers associated.



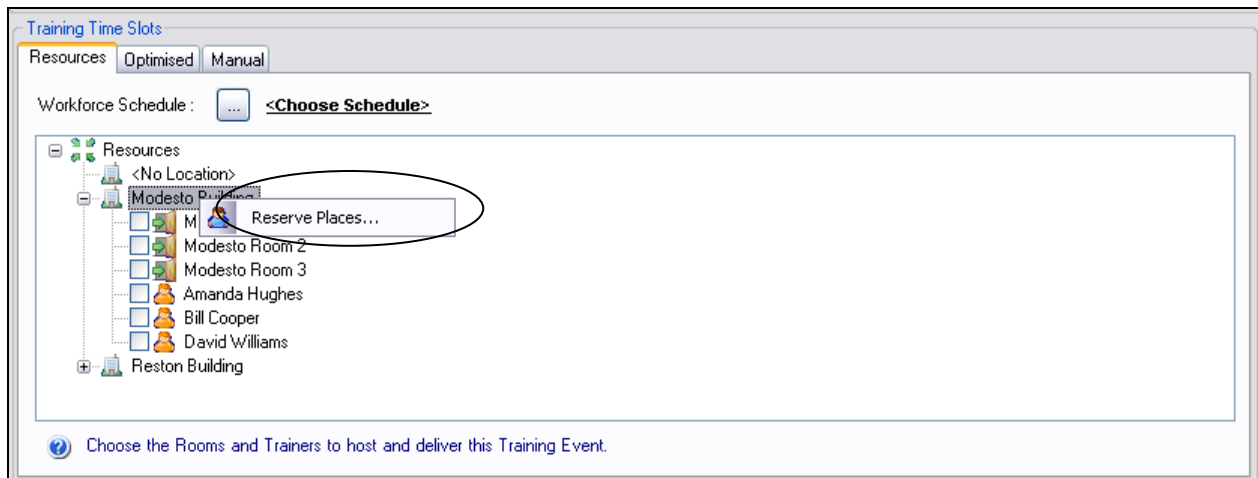
The room(s) and trainer(s) required are selected by clicking in the box at the left hand side.

Once the room(s) and trainer(s) have been selected, select the Optimized tab and follow the process.

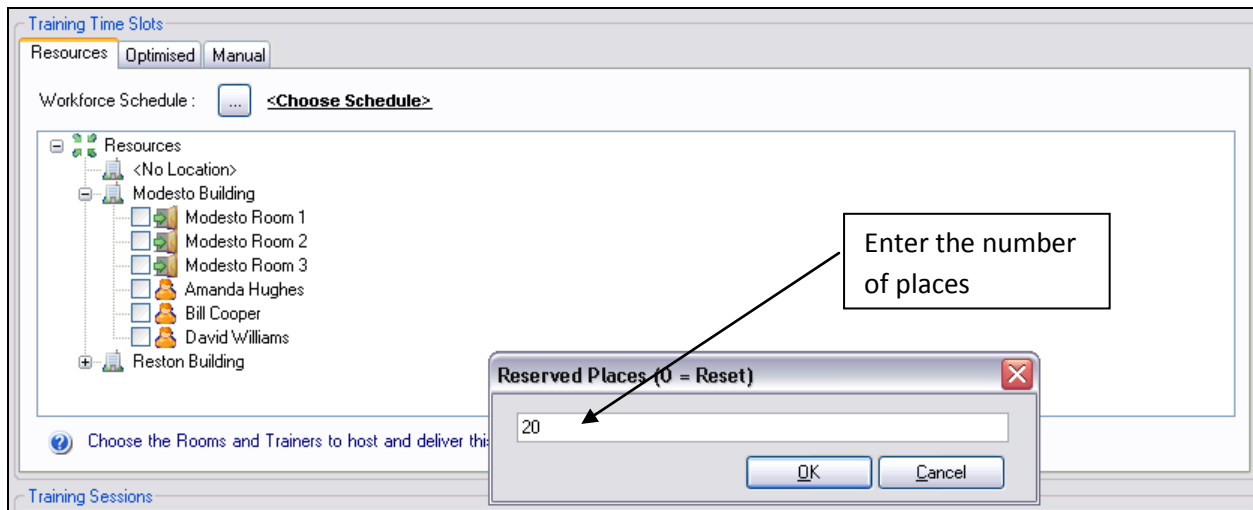
Scheduling a Combination of Room and Trainer Only

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, Genesys Training Manager still needs to be configured with all of the relevant information, excluding the User Selection up to the Scheduler stage as per the example below.

To reserve the correct number of rooms, right click on the required location and a 'Reserve Places' option appears.

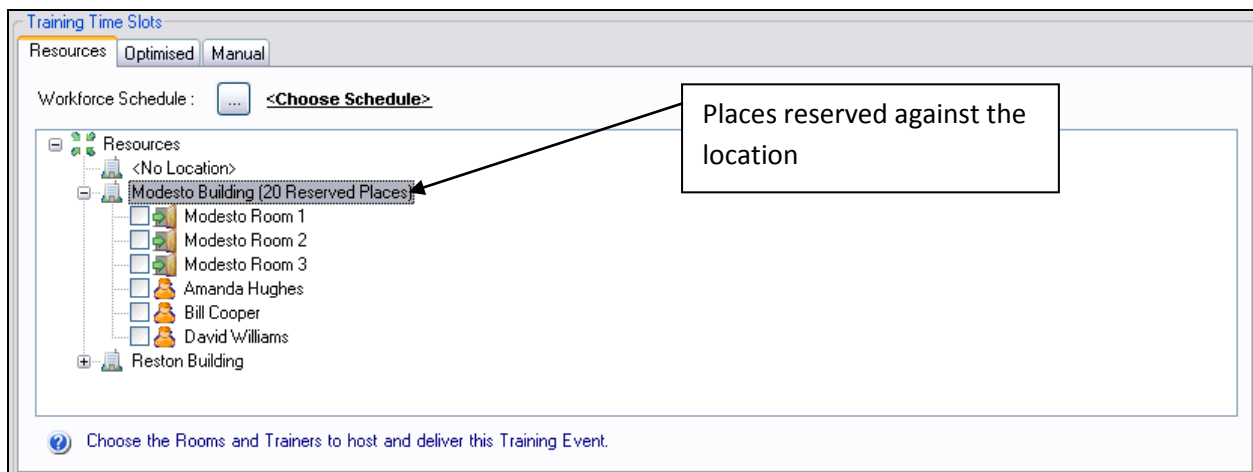


After selecting 'Reserve Places' enter the number of agents expected, for example, 20

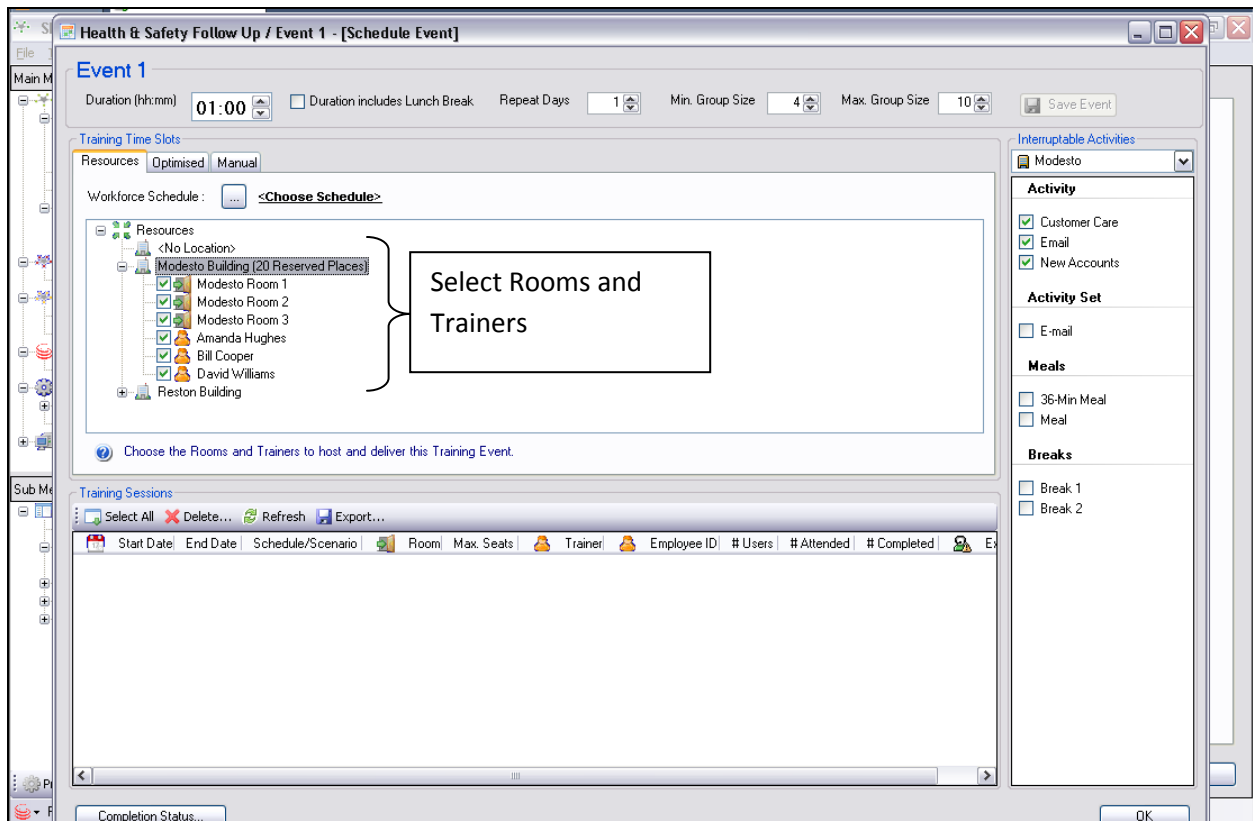


Select OK.

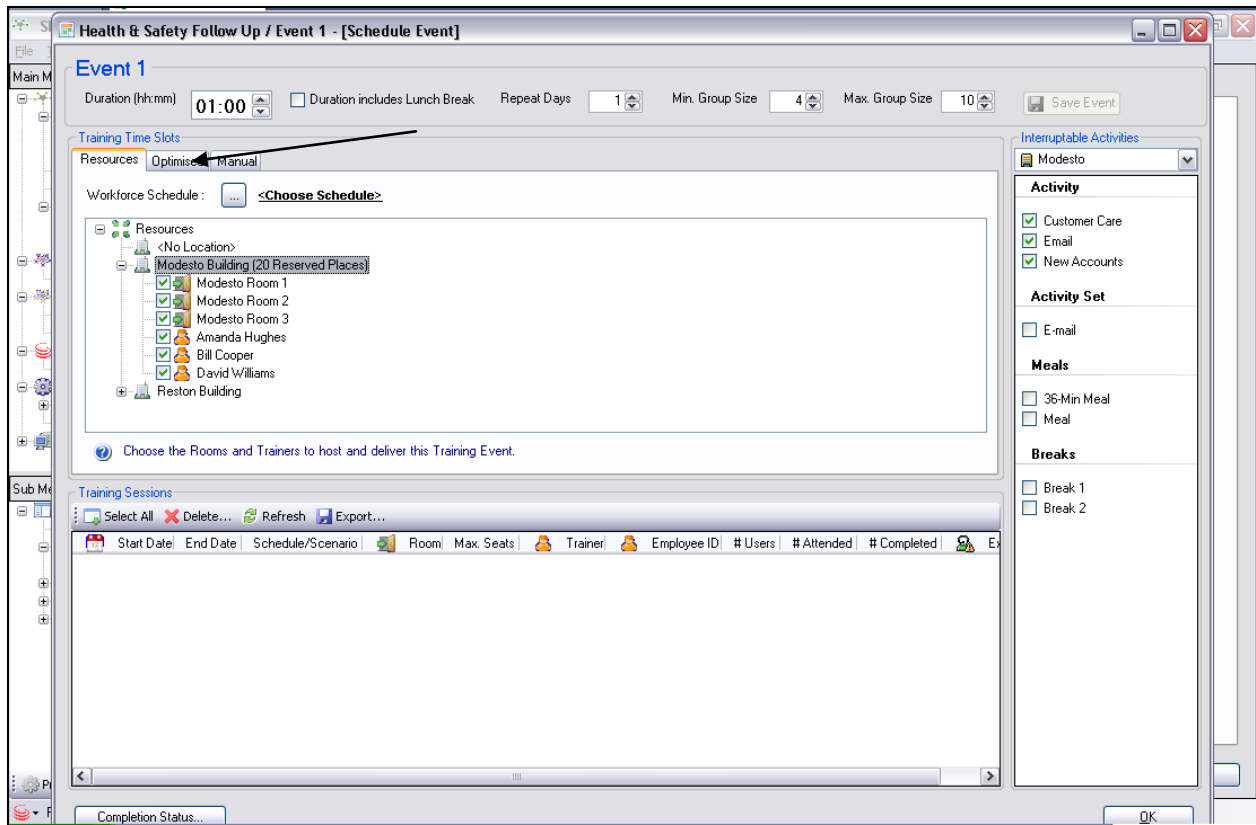
This identifies the number of places Genesys Training Manager needs to reserve for training.



Select the preferred 'Rooms' and 'Trainers' for the training session as normal.



Once the 'Resources' have been identified, select the 'Optimized' tab to move to the 'Optimization Algorithm Template'.



Agent Only Scheduling

To schedule Agents only, create the Training Request using the template wizard as normal, selecting the required agents in the User Selection window. Ignore Resources in the Optimization Algorithm Template and continue from the Optimization tab.

Optimization Algorithm Window

The Optimization Algorithm Template (see example below) is where the business constraints are configured that the algorithm uses to schedule training sessions into Genesys WFM.

It is divided into five sections:

1. Event details
2. Training Window
3. Interruptible Activities
4. Optimization Algorithm
5. Booking Strategies
6. Training Sessions

The screenshot displays the 'Health & Safety Follow Up / Event 1 - [Schedule Event]' window. It is divided into several sections, each labeled with a number in a white box:

- 1. Event details:** Located at the top, it includes fields for 'Duration (hh:mm)' (01:00), 'Repeat Days' (1), 'Min. Group Size' (4), and 'Max. Group Size' (10). There is a 'Save Event' button.
- 2. Training Window:** Located in the center, it shows a date range from '18 Jan 2010' to '29 Jan 2010'. Below this is a table with columns for 'Start Date', 'Time', 'End Date', and 'Time'. There are 'Build Dates...', 'Exclude...', and 'Search' buttons.
- 3. Interruptible Activities:** Located on the right side, it includes a dropdown for 'Modesto' and a list of activities: 'Customer Care', 'Email', and 'New Accounts'. There is also an 'Activity Set' section with 'E-mail' and 'Meals' (36-Min Meal, Meal) and a 'Breaks' section with 'Break 1' and 'Break 2'.
- 4. Optimization Algorithm Template:** Located on the left side, it includes 'Time & Travel Constraints' (Transition Time (minutes) 15, Minimum Activity Gap Before 0, Minimum Activity Gap After 0, Trainer Travel) and 'Performance Constraints' (Coverage Tolerance -250, Maximum Team Offline (%) 100).
- 5. Booking Strategies:** Located in the center, it includes a 'Booking Strategy' dropdown set to 'Randomly Distribute' and a checkbox for 'Retrieve fresh data from Genesys WFM'.
- 6. Training Sessions:** Located at the bottom, it includes a table with columns: 'Start Date', 'End Date', 'Schedule/Scenario', 'Room', 'Max. Seats', 'Trainer', 'Employee ID', '# Users', '# Attended', '# Completed', and 'Es'. There are 'Select All', 'Delete...', 'Refresh', and 'Export...' buttons.

Event Details

This information is brought forward from the information entered in the 'Scheduling Options' window in the 'Training Plans' tab. Amendments can be made to the detail here if required.

Training Window

The dates in the 'Training Window' are brought across from the date range entered in the 'Start' tab of the training request. The training times are brought across from the times entered in the 'Optimization Algorithm Template' window.

Different templates can be created by changing the 'From' and 'To' times and selecting or deselecting any days, Monday to Sunday. Information can also be changed within 'Time & Travel Constraints' and 'Performance Constraints' and saved as a new template by clicking on the save button. Once the save button is selected the option to rename the template is given which then creates a new template. Once the template has been saved this will be available for selection in the pull down box.

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

Training Time Slots

Resources Optimised Manual

Optimisation Algorithm Template

Mon - Fri 09:00 - 19:00 & Sat 09:00 - 13:00

Time & Travel Constraints

Transition Time (minutes) 15

Minimum Activity Gap Before 0

Minimum Activity Gap After 0

Trainer Travel ☐

Performance Constraints

Coverage Tolerance -250

Maximum Team Offline (%) 100

Booking Strategy Randomly Distribute

Training Window

18 Jan 2010 to 29 Jan 2010

Start Date	Time	End Date	Time
18 Jan 2010	08:00	18 Jan 2010	19:00
19 Jan 2010	08:00	19 Jan 2010	19:00
20 Jan 2010	08:00	20 Jan 2010	19:00
21 Jan 2010	08:00	21 Jan 2010	19:00
22 Jan 2010	08:00	22 Jan 2010	19:00
23 Jan 2010	09:00	23 Jan 2010	13:00
24 Jan 2010	09:00	24 Jan 2010	13:00
25 Jan 2010	08:00	25 Jan 2010	19:00

Build Dates... Exclude... Search

Retrieve fresh data from Genesys WFM ☒

Excluding Training Dates

To exclude specific dates from scheduling training activity, there are three options:

- **Manual** – right click on the specific date within the training window and select 'Remove'.

Training Time Slots

Resources Optimised **Manual**

Optimisation Algorithm Template

Mon - Fri 09:00 - 19:00 & Sat / ! [Save] [Delete]

Time & Travel Constraints

Transition Time (minutes) 15

Minimum Activity Gap Before 0

Minimum Activity Gap After 0

Trainer Travel ☐

Performance Constraints

Coverage Tolerance -250

Maximum Team Offline (%) 100

	From	To	Enable
Mon	08:00	19:00	<input checked="" type="checkbox"/>
Tue	08:00	19:00	<input checked="" type="checkbox"/>
Wed	08:00	19:00	<input checked="" type="checkbox"/>
Thu	08:00	19:00	<input checked="" type="checkbox"/>
Fri	08:00	19:00	<input checked="" type="checkbox"/>
Sat	09:00	13:00	<input checked="" type="checkbox"/>
Sun	09:00	13:00	<input checked="" type="checkbox"/>

Booking Strategy Randomly Distribute

Training Window

18 Jan 2010 to 29 Jan 2010

Start Date	Time	End Date	Time
18 Jan 2010	08:00	18 Jan 2010	19:00
19 Jan 2010	08:00	19 Jan 2010	19:00
20 Jan 2010	08:00	20 Jan 2010	19:00
21 Jan 2010	08:00	21 Jan 2010	19:00
22 Jan 2010	08:00	23 Jan 2010	13:00
23 Jan 2010	09:00	23 Jan 2010	13:00
24 Jan 2010	09:00	24 Jan 2010	13:00
25 Jan 2010	08:00	25 Jan 2010	19:00

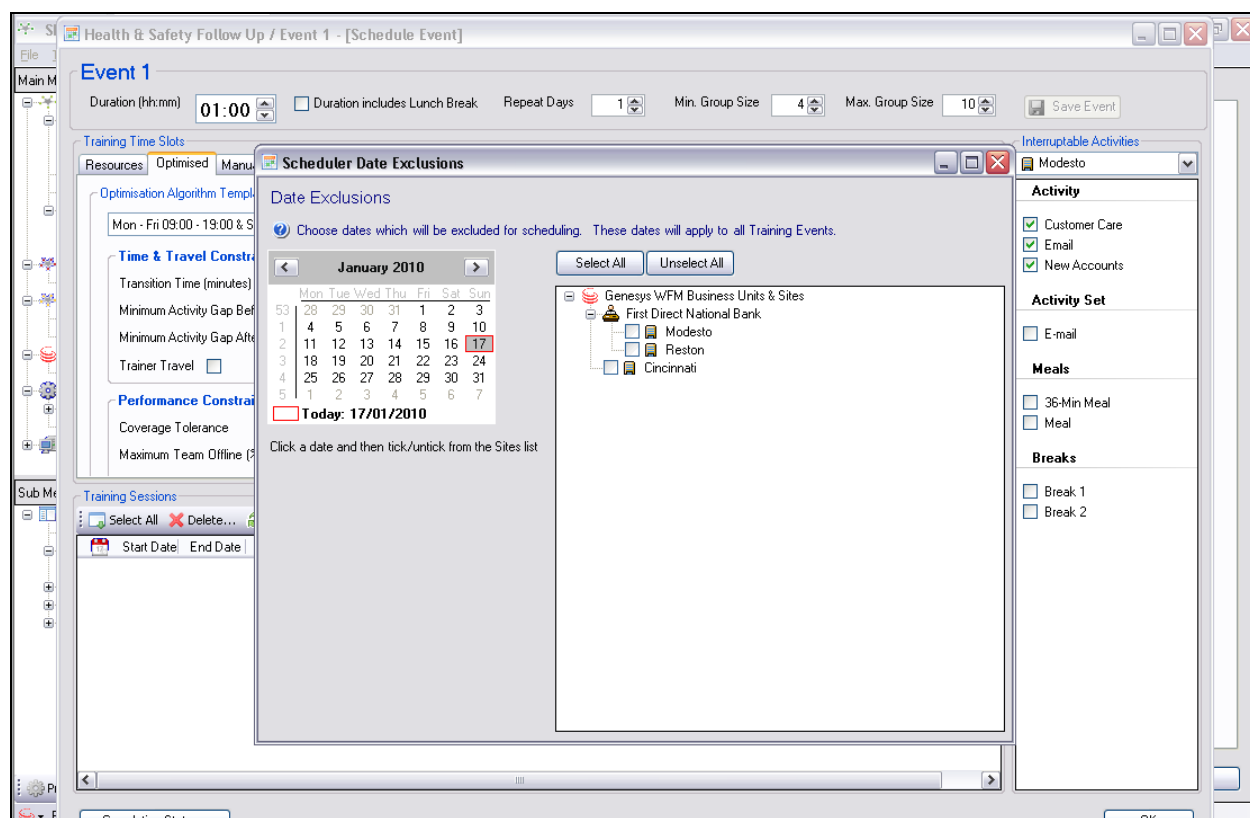
[Build Dates...] [Exclude...] [Search]

Retrieve fresh data from Genesys WFM ☒

- **Automatic** – select the 'Exclude' button at the bottom of the 'Training Window' and a new window will appear.

Exclusion dates can be selected by line of business and Genesys Training Manager will exclude them as part of the scheduling process. Select the date from the calendar and then select the line of business either by clicking on the box at the left hand side or clicking on the 'Select All' button.

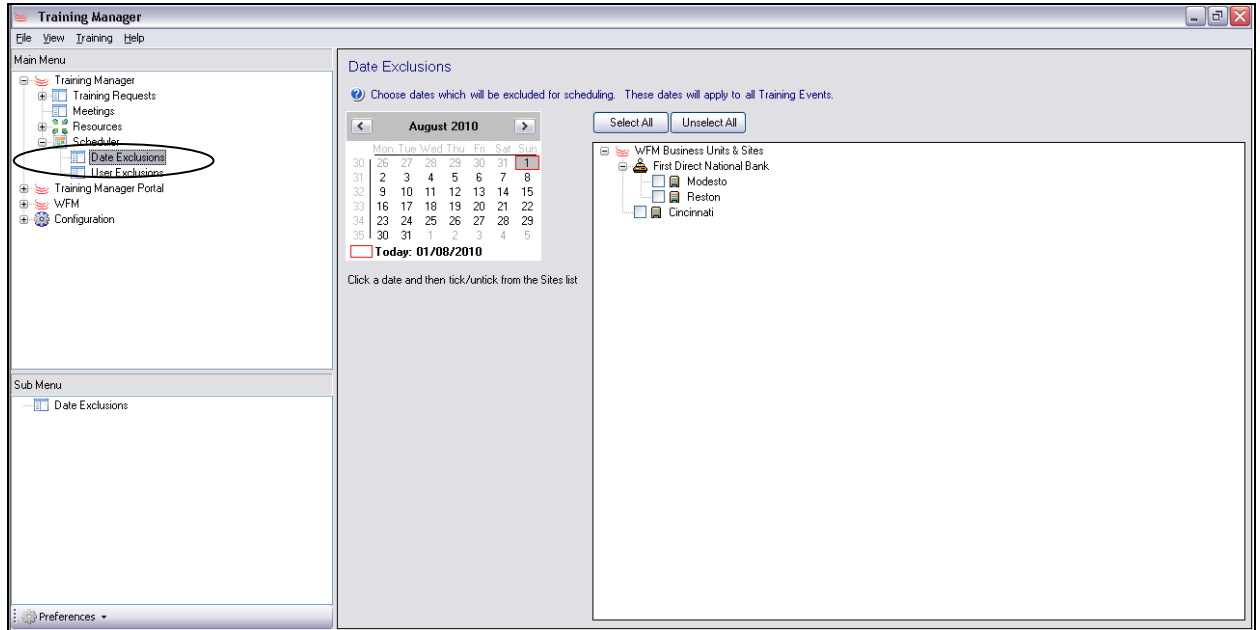
Note: The dates will still appear within the 'Training Window' but will be excluded for the line of business in the scheduling process.



- **Excluding dates from the Main Menu**

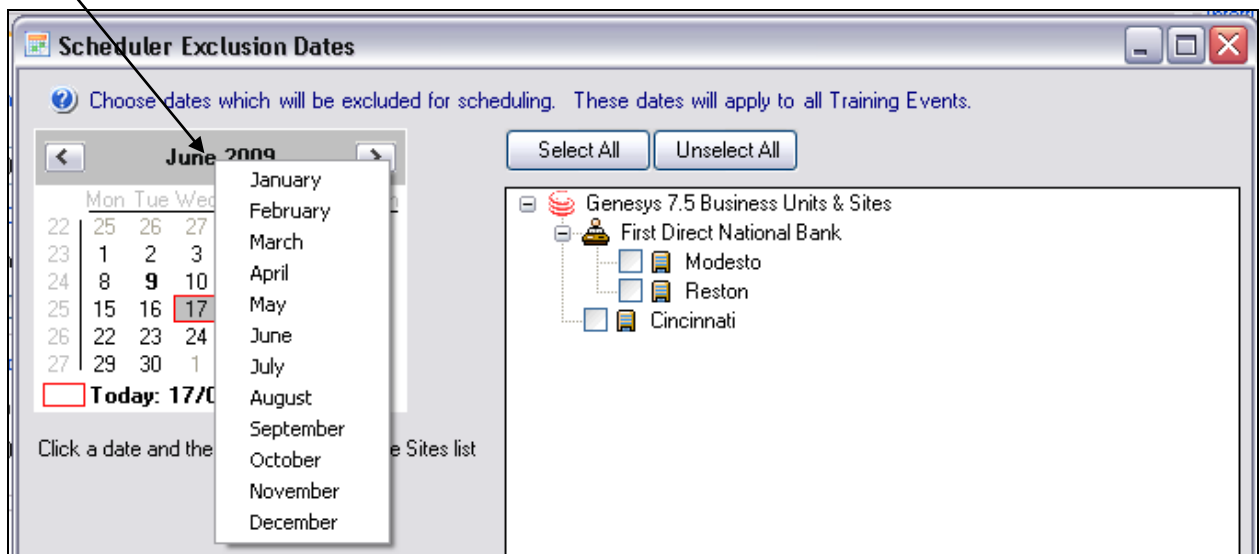
There is also an option on the main menu now to exclude specific dates.

Select 'Date Exclusions' from the main menu.



Select the required dates in the calendar view and then select the line of business that the dates is required to be excluded from any scheduled training activity.

Click on the month to select the required month from the drop down box.



Any amendments to the 'Optimization Algorithm template' must be saved and will be covered later in this document.

Interruptible Activities

The Activities that can be interrupted will be Site or Scheduling Pot specific. If more than one site is selected within the Site Selection tab then the Site activities have to be selected separately.

Identify each Site or Scheduling Pot from the pull down box and then select which 'Activities' are interruptible, in other words, training can be scheduled while the User is on this Activity.

Note: If Overtime is an Activity, then it would be available within the Interruptible Activities window. To include the Overtime Activity as part of the training schedule, this would be selected as interruptible.

If full day training is being scheduled then Meals and Breaks Activity may need to be selected as interruptible.

The screenshot shows the 'Event 1' window in Genesys Training Manager. The 'Interruptible Activities' panel on the right lists the following activities:

- Activity**
 - ☒ Customer Care
 - ☒ Email
 - ☒ New Accounts
- Activity Set**
 - ☐ E-mail
- Meals**
 - ☐ 36-Min Meal
 - ☐ Meal
- Breaks**
 - ☐ Break 1
 - ☐ Break 2

Annotations on the right side of the screenshot:

- A bracket groups 'Customer Care', 'Email', and 'New Accounts' with the text: 'These Activities are interruptible'.
- A bracket groups '36-Min Meal', 'Meal', 'Break 1', and 'Break 2' with the text: 'Consider selecting Meals and Breaks as interruptible, if a training session is over 2.5 hours'.

Optimization Algorithm Template

There are two sections in this template which affect the Trainer and Room and any performance constraints. The information entered here is used by Genesys Training Manager to understand what the maximum impact to the service can be when scheduling any training activity.

- 1. Time & Travel Constraints
- 2. Performance Constraints

Time and Travel Constraints

This relates only to the Room and Trainer activity.

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. Genesys 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.

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 and this could be at the start of the day or after some other off phone activity, for example, Breaks.

Minimum Activity Gap After

This is similar to 'Before' 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 agents shift as the agent may not sign back on the phones which would affect their adherence.

Trainer Travel

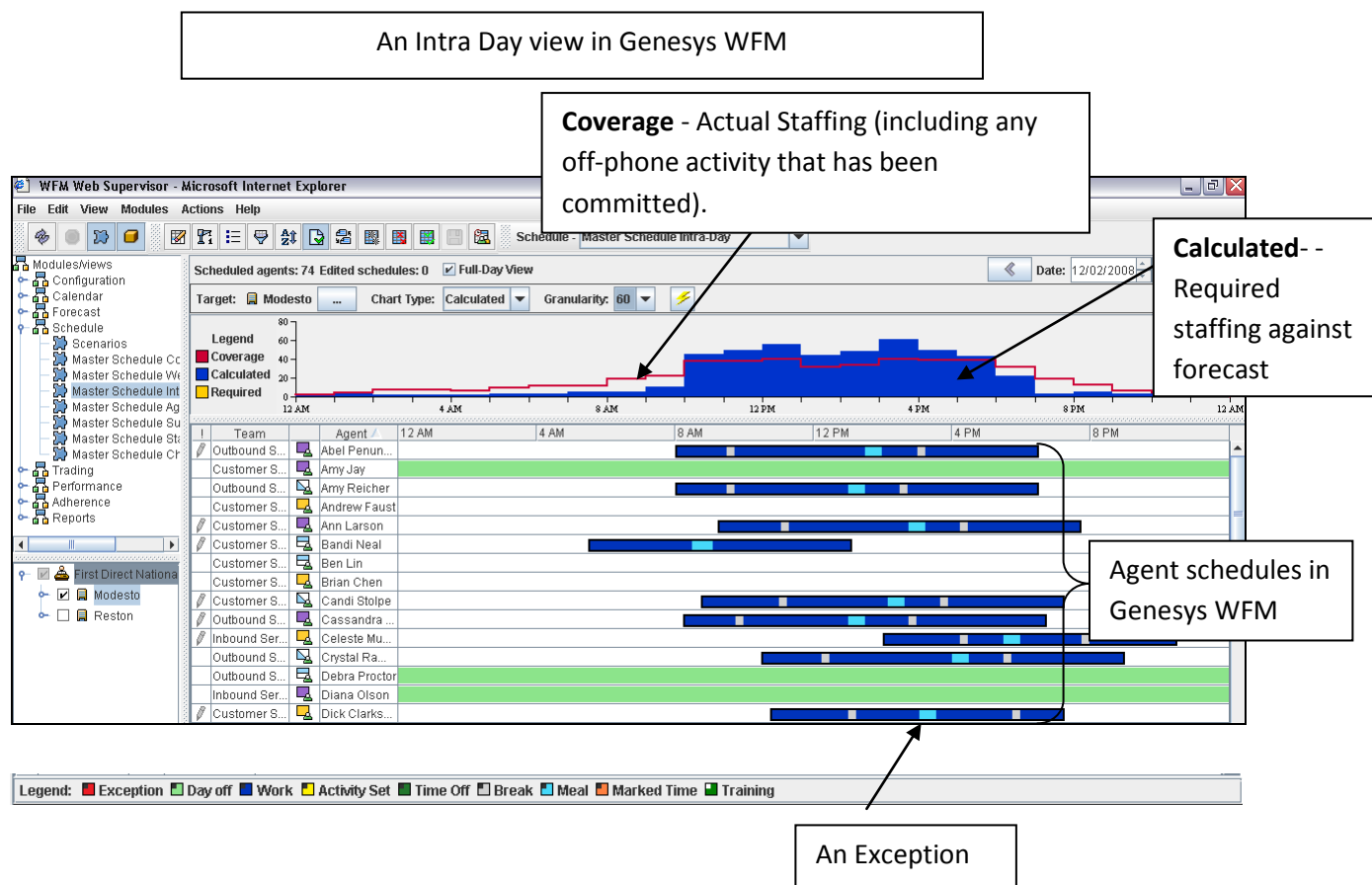
This option is selected when non home Trainers are selected to be used as part of the training resource. It is recommended that in the first instance this is not selected to prioritise home location Trainers first and then rerun the scheduler again to use Trainers that have to travel.

Coverage Tolerance

This is the difference between staffing required (Calculated) and the actual (Coverage) for the duration of the training session.

The application looks at the required (Calculated) staffing (staffing required based on forecast Service Level and any planned shrinkage) and the actual (Coverage) which is what is actually scheduled including any committed off phone activity. The coverage tolerance is the difference between what staffing you have working (coverage) and what is required (calculated).

For example, Calculated number of Agents is 100 across the duration of the training and the Coverage is 90, if the Coverage Tolerance was -20 only 10 would be selected as the staffing is already 10 short. Genesys Training Manager would not schedule any training activity if by scheduling the training the coverage would then drop below the -20 requirement.



Maximum Team Offline (%)

The maximum % of a Team that can be offline.

Retrieve Fresh Data from Genesys 7.5

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

Booking Strategy

Booking Strategy gives the user the option to specify whether the training requests should be Front Loaded, Randomly Distributed or Back Loaded together with the option to maximise the group size.

By selecting 'Front Load' or Back Load, Genesys Training Manager will try and schedule all of the training sessions at the front or the back of the training window, whilst taking into account the 'Performance Constraints', see the example on the next page.

Event 1

Duration (hh:mm) **00:30** ☐ Duration includes Lunch Break Repeat Days **1** Min. Group Size **1** Max. Group Size **10** Save Event

Training Time Slots

Resources Optimised Manual

Optimised Search Algorithm Template

Monday - Friday 07:00 - 19:00 From To Enable

Time & Travel Constraints

Transition Time (mins) **0**

Min. Activity Gap Before (mins) **0**

Min. Activity Gap After (mins) **0**

Trainer Travel ☐

Performance Constraints

Coverage Tolerance (people) **-50**

Maximum Team Offline (%) **100**

Booking Strategy

Front Load (Maximise Group Size)

Front Load

Front Load (Maximise Group Size)

Randomly Distribute

Randomly Distribute (Maximise Group Size)

Back Load

Back Load (Maximise Group Size)

Training Window

9 Jun 2010 to 9 Jul 2010

Start Date	Time	End Date	Time
9 Jun 2010	07:00	9 Jun 2010	19:00
10 Jun 2010	07:00	10 Jun 2010	19:00
11 Jun 2010	07:00	11 Jun 2010	19:00
12 Jun 2010	07:00	12 Jun 2010	19:00
13 Jun 2010	07:00	13 Jun 2010	19:00
14 Jun 2010	07:00	14 Jun 2010	19:00
15 Jun 2010	07:00	15 Jun 2010	19:00
16 Jun 2010	07:00	16 Jun 2010	19:00
17 Jun 2010	07:00	17 Jun 2010	19:00

Build Dates... Exclude... Search

Retrieve fresh data from Genesys WFM ☒

Exceptions Legend:

OK Some/All Missing

Master Schedule [9] Scenarios [0]

Start Date	End Date	Room	Max. Seats	Trainer	Employee ID	# Users	# Attended	# Completed	Name
9 Jun 2010 07:00	9 Jun 2010 07:30	<None>	<None>			10	0	0	Crystal Ramos
9 Jun 2010 08:45	9 Jun 2010 09:15	<None>	<None>			10	0	0	Abel Penunuri

9 Item(s)

Completion Status...

Select 'Randomly Distribute' from the pull down list under 'Booking Strategies' and Genesys Training Manager will try and schedule the training activity across the training window, taking into account the 'Performance Constraints, see the example on the next page.

Training Plan 1 > Event 1 - [Schedule Event]

Event 1

Duration (hh:mm) ☐ Duration includes Lunch Break Repeat Days Min. Group Size Max. Group Size

Training Time Slots

Resources Optimised Manual

Optimised Search Algorithm Template

Monday - Friday 07:00 - 19:00

Time & Travel Constraints

Transition Time (mins)

Min. Activity Gap Before (mins)

Min. Activity Gap After (mins)

Trainer Travel ☐

Performance Constraints

Coverage Tolerance (people)

Maximum Team Offline (%)

Booking Strategy

Front Load (Maximise Group Size)

Front Load

Front Load (Maximise Group Size)

Randomly Distribute

Randomly Distribute (Maximise Group Size)

Back Load

Back Load (Maximise Group Size)

Training Window

9 Jun 2010 to 9 Jul 2010

Start Date	Time	End Date	Time
9 Jun 2010	07:00	9 Jun 2010	19:00
10 Jun 2010	07:00	10 Jun 2010	19:00
11 Jun 2010	07:00	11 Jun 2010	19:00
12 Jun 2010	07:00	12 Jun 2010	19:00
13 Jun 2010	07:00	13 Jun 2010	19:00
14 Jun 2010	07:00	14 Jun 2010	19:00
15 Jun 2010	07:00	15 Jun 2010	19:00
16 Jun 2010	07:00	16 Jun 2010	19:00
17 Jun 2010	07:00	17 Jun 2010	19:00

Retrieve fresh data from Genesys WFM ☒

Exceptions Legend:

☒ OK ☐ Some/All Missing

Master Schedule (9) Scenarios (0)

Start Date	End Date	Room	Max. Seats	Trainer	Employee ID	# Users	# Attended	# Completed	Name
9 Jun 2010 07:00	9 Jun 2010 07:30	<None>	<None>			10	0	0	Crystal Ramos
9 Jun 2010 08:45	9 Jun 2010 09:15	<None>	<None>			10	0	0	Abel Penunuri

9 Item(s)

Interruptable Act

Modesto

Activity

☒ Customer C

☒ Email

☒ New Account

Activity Set

☐ E-mail

Meals

☐ 36-Min Meal

☐ Meal

Breaks

☐ Break 1

☐ Break 2

Once everything has been entered update the Optimization Algorithm Template by clicking on the save button.

Select 'Search' to retrieve fresh data from Genesys 7.5.

Event 1

Duration (hh:mm) **01:00** ☐ Duration includes Lunch Break Repeat Days **1** Min. Group Size **6** Max. Group Size **10** **Save Event**

Training Time Slots

Resources Optimised **Manual**

Optimisation Algorithm Template

Mon - Fri 09:00 - 20:00 **Save** **Reset**

Time & Travel Constraints

Transition Time (minutes) **15**

Trainer Travel ☐

Performance Constraints

Coverage Tolerance **-500**

Maximum Team Offline (%) **100**

Training Window

24 May 2009 to 18 Jul 2009

Start Date	Time	End Date	Time
25 May 2009	09:00	25 May 2009	17:00
26 May 2009	09:00	26 May 2009	20:00
27 May 2009	09:00	27 May 2009	20:00
28 May 2009	09:00	28 May 2009	20:00
29 May 2009	09:00	29 May 2009	20:00
1 Jun 2009	09:00	1 Jun 2009	17:00
2 Jun 2009	09:00	2 Jun 2009	20:00

Build Dates... **Exclude...** **Search** ☒ Retrieve fresh data from Genesys 7.5

Interruptable Activities

Modesto

Activity

☒ Customer Care

☒ Email

☒ New Accounts

Activity Set

☐ E-mail

Meals

☐ 36-Min Meal

☐ Meal

Breaks

☐ Break 1

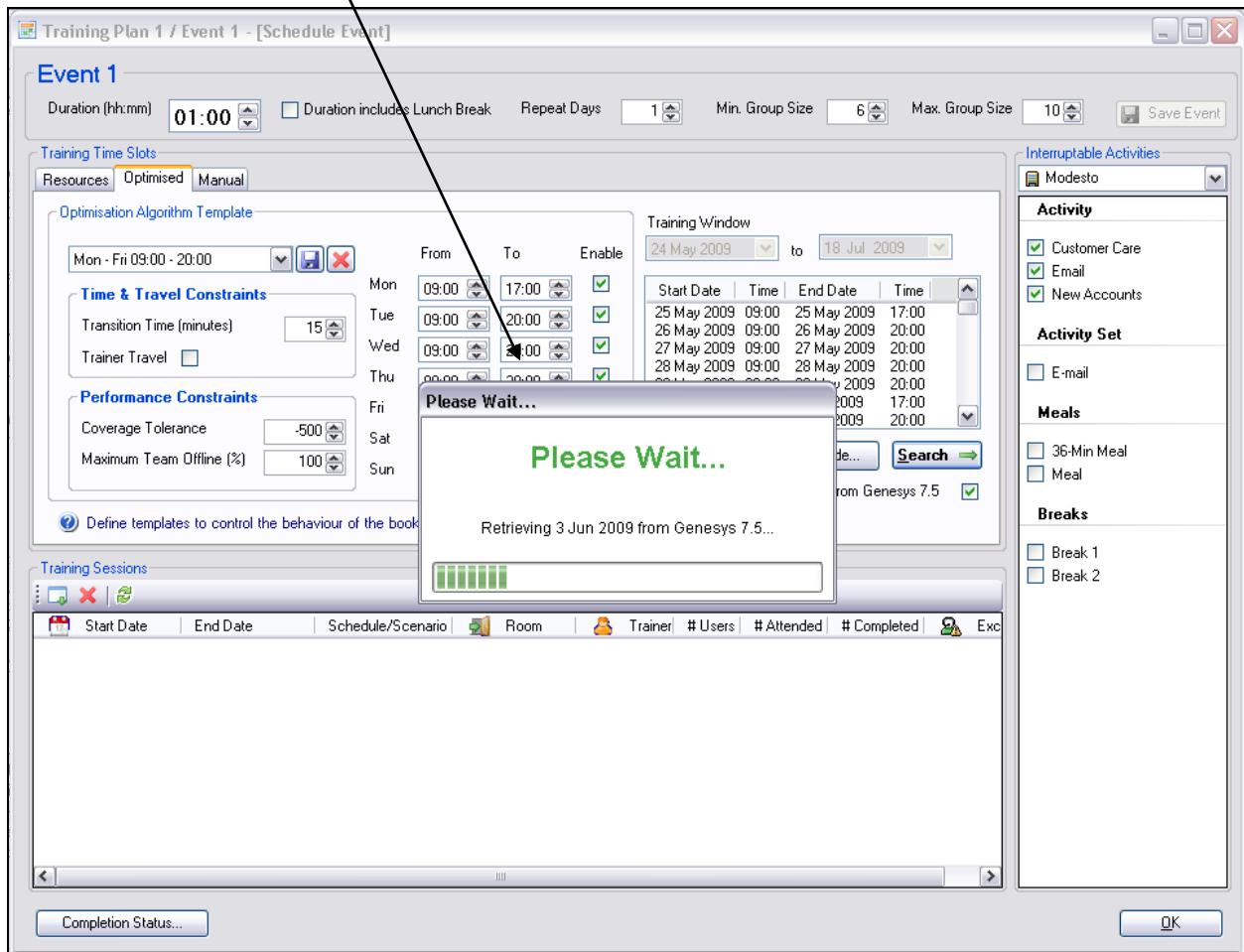
☐ Break 2

Training Sessions

Start Date	End Date	Schedule/Scenario	Room	Trainer	# Users	# Attended	# Completed	Exc
------------	----------	-------------------	------	---------	---------	------------	-------------	-----

Completion Status... **OK**

Genesys Training Manager is retrieving information from Genesys WFM.



Genesys Training Manager has retrieved the information from WFM and is now running an optimized search against the retrieved data based on the criteria specified.

Event 1

Duration (hh:mm) **01:00** ☐ Duration includes Lunch Break Repeat Days **1** Min. Group Size **6** Max. Group Size **10**

Training Time Slots

Resources Optimised Manual

Optimisation Algorithm Template

Mon - Fri 09:00 - 20:00

Time & Travel Constraints

Transition Time (minutes) **15**

Trainer Travel ☐

Performance Constraints

Coverage Tolerance **-500**

Maximum Team Offline (%) **100**

Training Window

24 May 2009 to 18 Jul 2009

Start Date	Time	End Date	Time
25 May 2009	09:00	25 May 2009	17:00
26 May 2009	09:00	26 May 2009	20:00
27 May 2009	09:00	27 May 2009	20:00
28 May 2009	09:00	28 May 2009	20:00
29 May 2009	09:00	29 May 2009	20:00
1 Jun 2009	09:00	1 Jun 2009	17:00
2 Jun 2009	09:00	2 Jun 2009	20:00

☐ Retrieve fresh data from Genesys 7.5

Interruptable Activities

Modesto

Activity

☒ Customer Care

☒ Email

☒ New Accounts

Activity Set

☐ E-mail

Meals

☐ 36-Min Meal

☐ Meal

Breaks

☐ Break 1

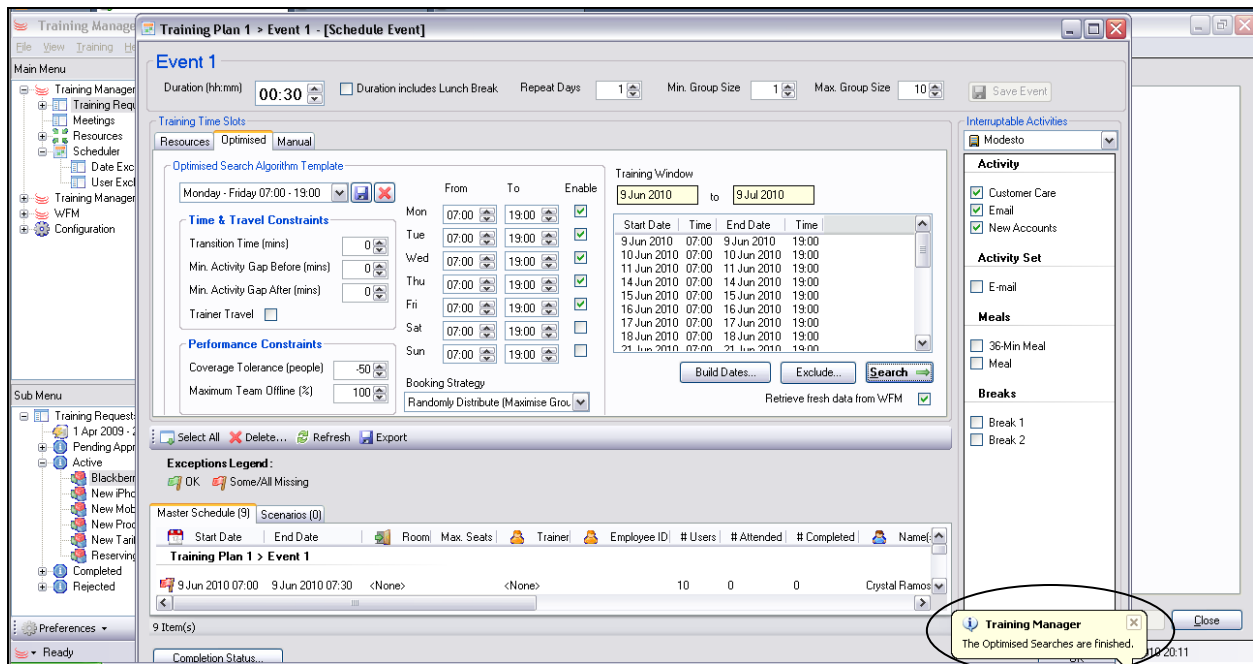
☐ Break 2

Training Sessions

Start Date	End Date	Schedule/Scenario	Room	Trainer	# Users	# Attended	# Completed	Exc
------------	----------	-------------------	------	---------	---------	------------	-------------	-----

Running Optimised Search...

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



Training Sessions

Once completed the training sessions are visible in the 'Training Sessions' window and the red flag at the left hand side indicates that the training has only been created in Genesys Training Manager but has not been committed into Genesys WFM.

As the training sessions were created using the Master Schedule, the information is visible in the Master Schedule tab together with the number of sessions created. In the example below the number of session is 9.

If a Scenario had been chosen to run the schedule against to view any created training sessions the 'Scenario' tab needs to be selected to view the session details.

Event 1

Duration (hh:mm) 00:30 ☐ Duration includes Lunch Break Repeat Days 1 Min. Group Size 1 Max. Group Size 10 Save Event

Training Time Slots: Resources Optimised Manual

Optimised Search Algorithm Template: Monday - Friday 07:00 - 19:00

Time & Travel Constraints

Transition Time (mins) 0
Min. Activity Gap Before (mins) 0
Min. Activity Gap After (mins) 0
Trainer Travel ☐

Performance Constraints

Coverage Tolerance (people) -50
Maximum Team Offline (%) 100

Booking Strategy

Front Load (Maximise Group Size)
Front Load (Maximise Group Size)
Randomly Distribute
Randomly Distribute (Maximise Group Size)
Back Load
Back Load (Maximise Group Size)

Exceptions Legend:
OK Some/All Missing

Master Schedule (9) Scenarios (0)

Start Date	End Date	Room	Max. Seats	Trainer	Employee ID	# Users	# Attended	# Completed	Name
9 Jun 2010 07:00	9 Jun 2010 07:30	<None>	<None>			10	0	0	Crystal Ramos
9 Jun 2010 08:45	9 Jun 2010 09:15	<None>	<None>			10	0	0	Abel Penunuri

9 Item(s)

Completion Status...

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

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

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

Schedule / Scenario – identifies which Schedule or Scenario Genesys Training Manager has taken the data from and scheduled the training activity into. In the example above, the Schedule used is the Master Schedule.

Note: If the scheduled training was committed to the Master Schedule, this would be immediately visible in the Agents schedules, as confirmed training.

If a Scenario has been used, this allows for 'What If' planning and can be used to view what the impact of the training would be on resource and performance.

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

Max Seats – the maximum capacity of the room.

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

Users – 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.

Exception - this is the Genesys WFM code and color that will be visible in the agents schedule in WFM.

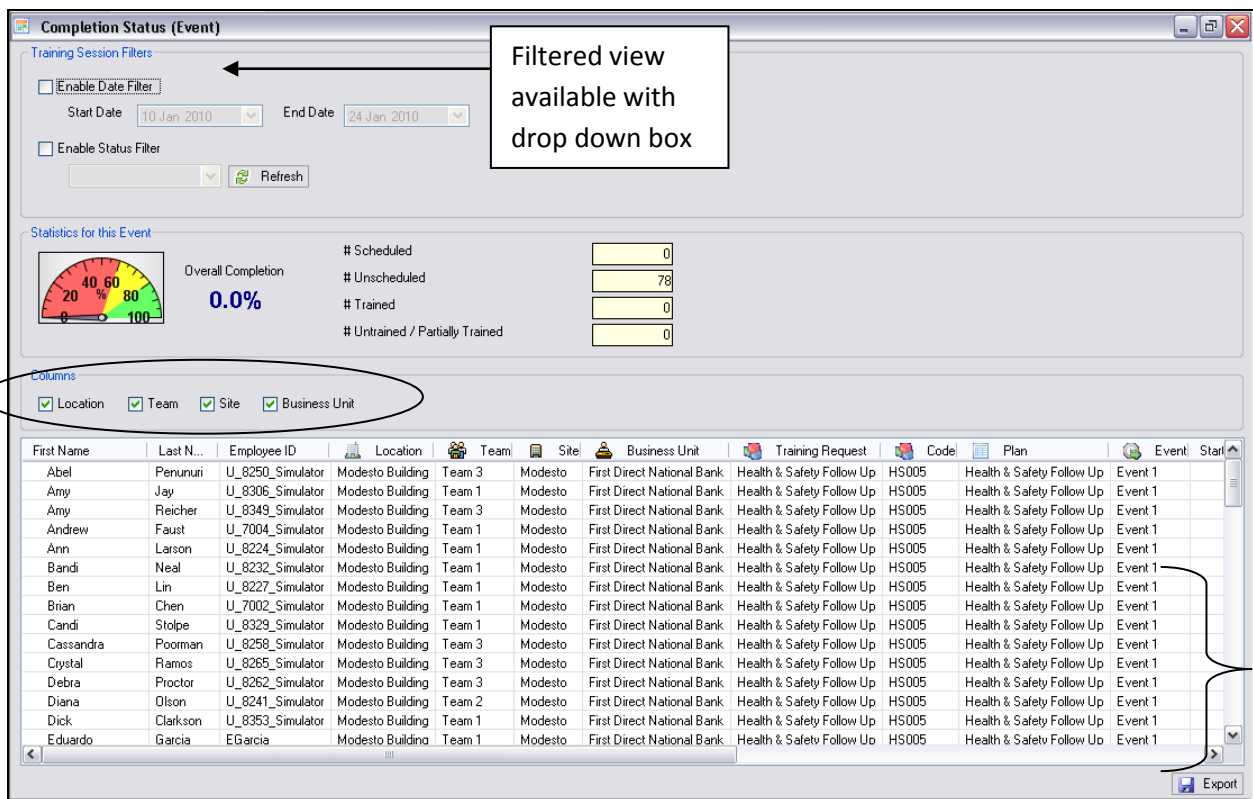
Completion Status – selecting this will present the status of all the agents selected for training see example on the next page.

The Completion Status Report also has the option to include additional information:

- Location
- Team
- Site
- Business Unit

See the example below.

A gauge has also been included which gives visibility of how complete the training event is and there is an export option in the bottom right hand corner to export the information into excel.



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.

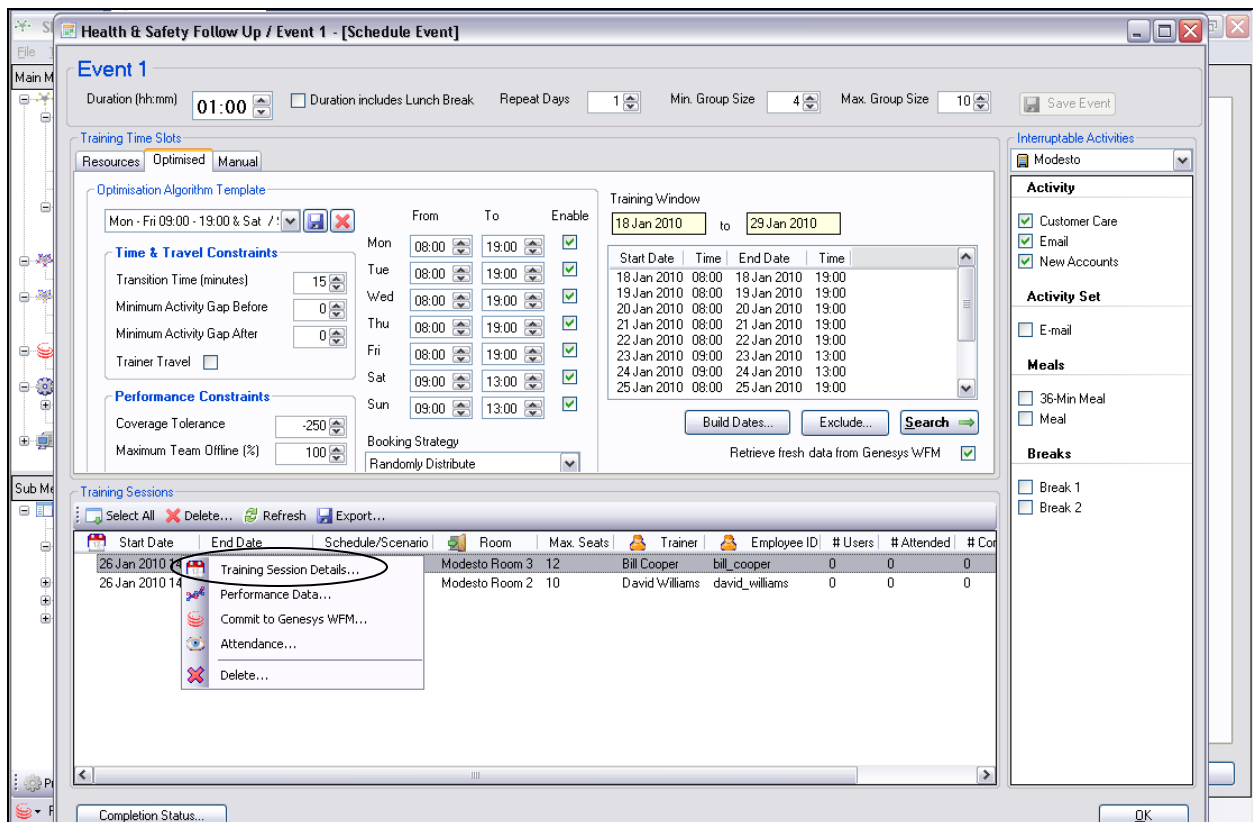
The screenshot displays the 'Health & Safety Follow Up / Event 1 - [Schedule Event]' window. The 'Event 1' tab is active, showing a duration of 01:00, minimum group size of 4, and maximum group size of 10. The 'Optimised' tab is selected under 'Training Time Slots'. The 'Optimisation Algorithm Template' shows 'Mon - Fri 09:00 - 19:00 & Sat / Sun' with a 'Training Window' from 18 Jan 2010 to 29 Jan 2010. The 'Time & Travel Constraints' section includes 'Transition Time (minutes)' set to 15, 'Minimum Activity Gap Before' and 'After' set to 0, and 'Trainer Travel' checked. The 'Performance Constraints' section shows 'Coverage Tolerance' at -250 and 'Maximum Team Offline (%)' at 100. The 'Booking Strategy' is set to 'Randomly Distribute'. The 'Training Sessions' table at the bottom is circled, showing two sessions for 'Modesto Room 3' and 'Modesto Room 2' on 26 Jan 2010, both with 12 and 10 seats respectively, and trainers Bill Cooper and David Williams. A callout box labeled 'Room and Trainer only' points to the 'Room' and 'Trainer' columns in the table.

Start Date	End Date	Schedule/Scenario	Room	Max. Seats	Trainer	Employee ID	# Users	# Attended	# Co
26 Jan 2010 14:15	26 Jan 2010 15:15	Master Schedule	Modesto Room 3	12	Bill Cooper	bill_cooper	0	0	0
26 Jan 2010 14:15	26 Jan 2010 15:15	Master Schedule	Modesto Room 2	10	David Williams	david_williams	0	0	0

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

OR

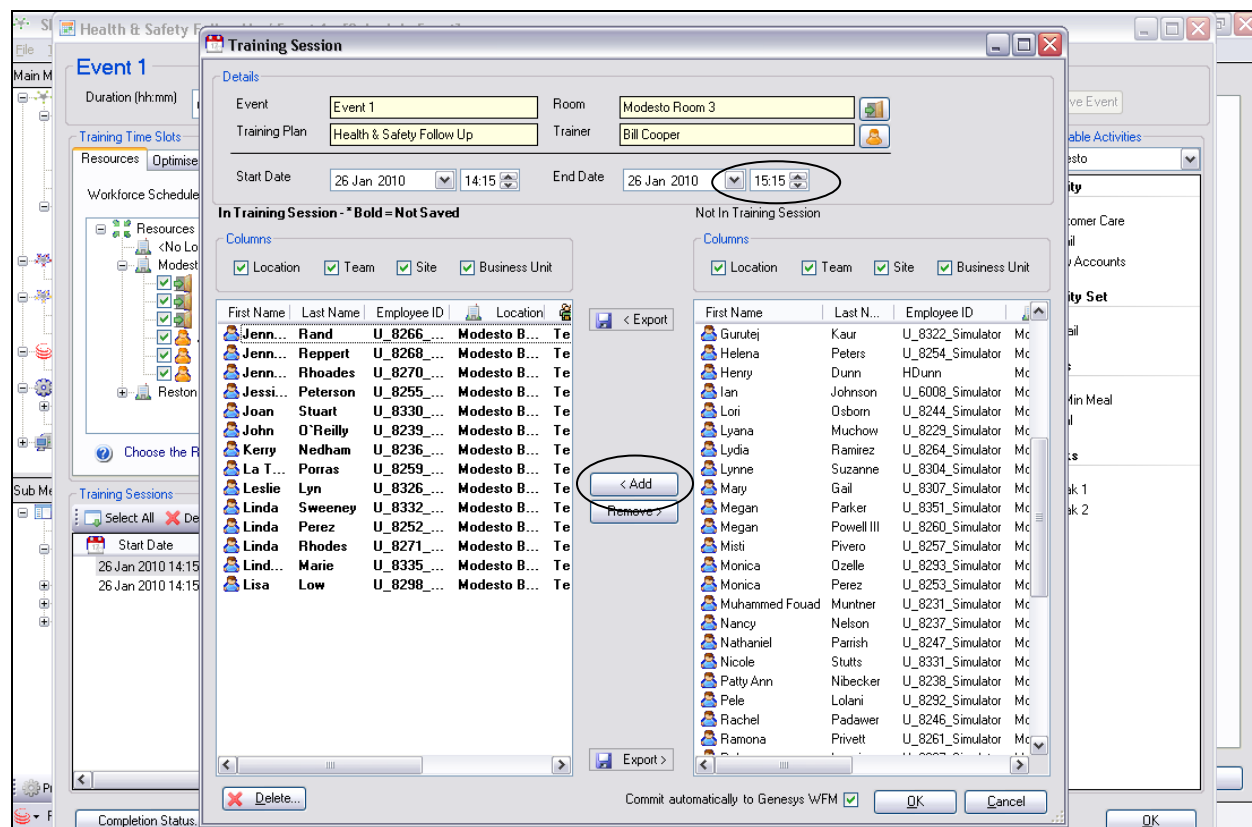
Select the agents in the 'User Selection' tab and then right click on the individual training sessions as per the example below.



Manually select the users from the right hand window and click on '<Add'. This will assign the user into 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 by deleting the training sessions and rerunning the schedules again with the users as part of the equation, is what we would recommend.

It is possible to amend the training session end time if required using the up and down keys. After selecting OK, Genesys Training Manager will check that there are no clashes with the Trainer, Room or if the Agent schedules still fit within the training session times. If the time is extended then the Coverage Tolerance will not be taken into account due to the change being manual.



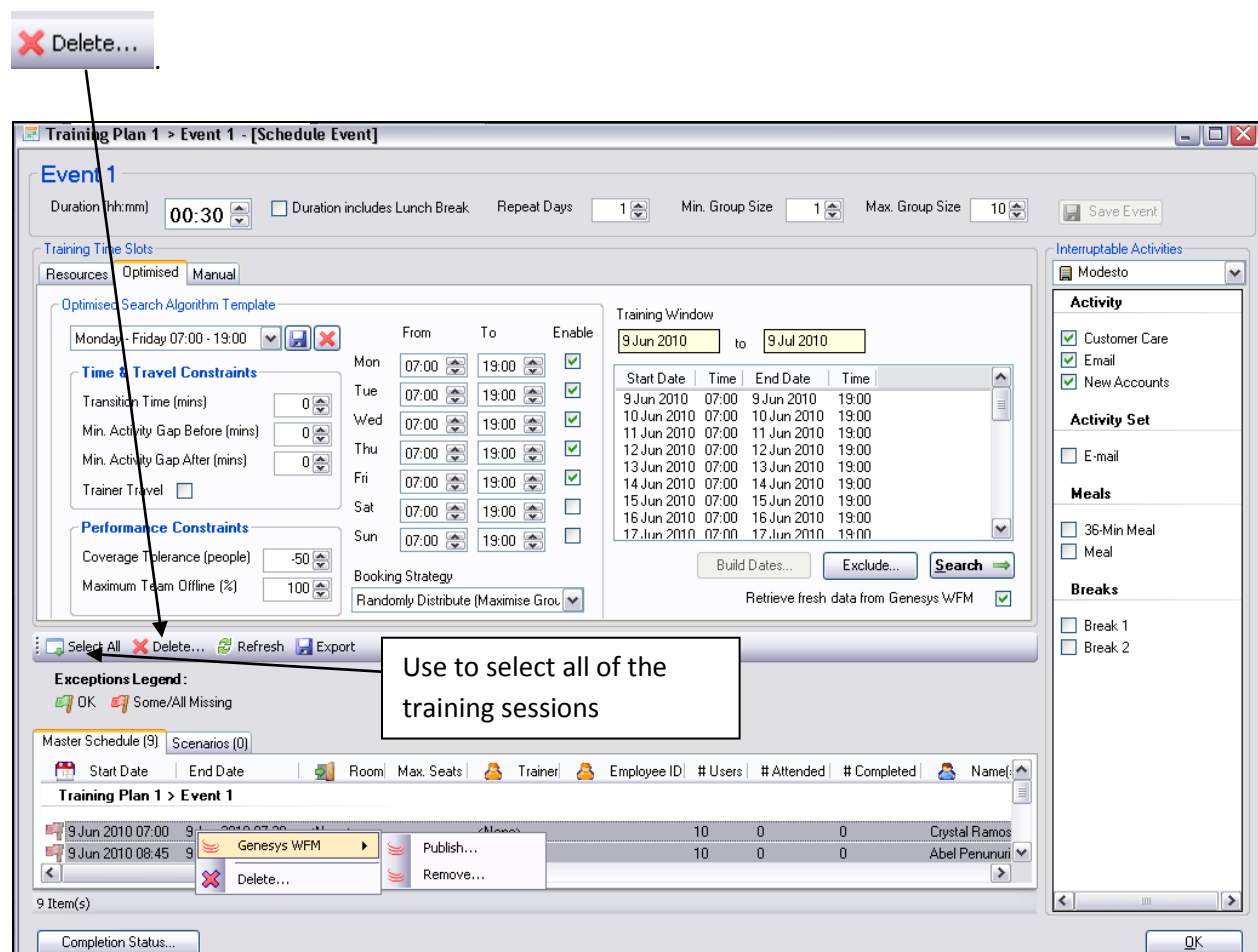
Committing Training Activity into Genesys WFM

The training needs to be committed into Genesys WFM, to view the impact. Highlight the training sessions and this can be done in bulk or individually by highlighting one session and then right clicking and selecting 'Genesys WFM', or use the select all button.

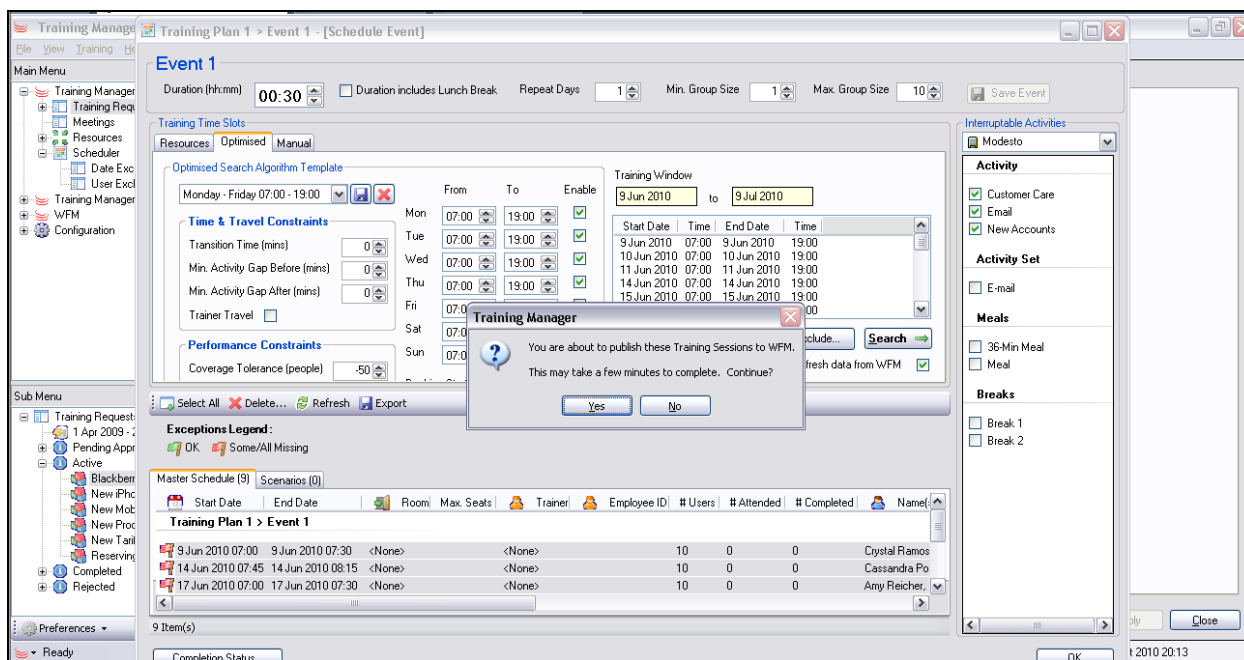
After selecting 'Genesys WFM' the available options are:

- 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.

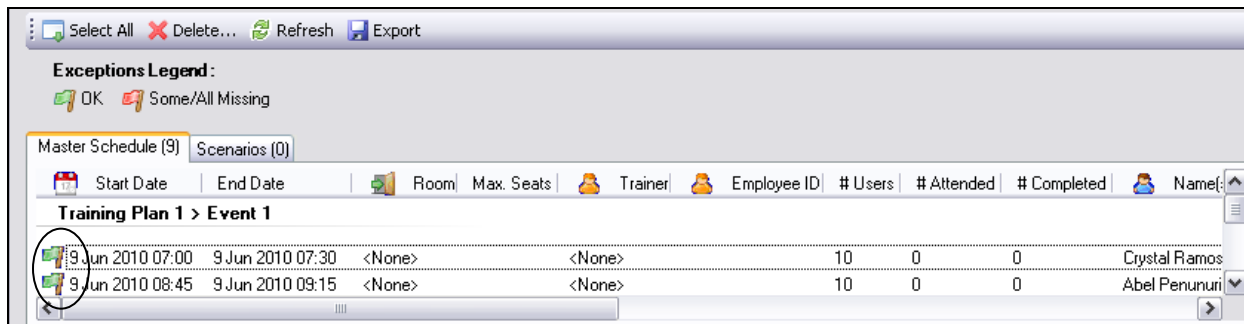
To remove and delete the training sessions select either 'Delete' or select all and then click on



Selecting 'Publish' Genesys Training Manager will then start to commit the training into Genesys WFM after advising that publishing the training sessions into WFM may take a few minutes.



The flags will turn green to confirm the training exceptions have been committed into Genesys WFM.



In Genesys WFM select 'Get Data' to refresh Genesys WFM with the new exceptions.


Genesys WFM Intra Day Schedule will now include the training exceptions in WFM within the Schedule or Scenario selected in the resources tab. Genesys 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.

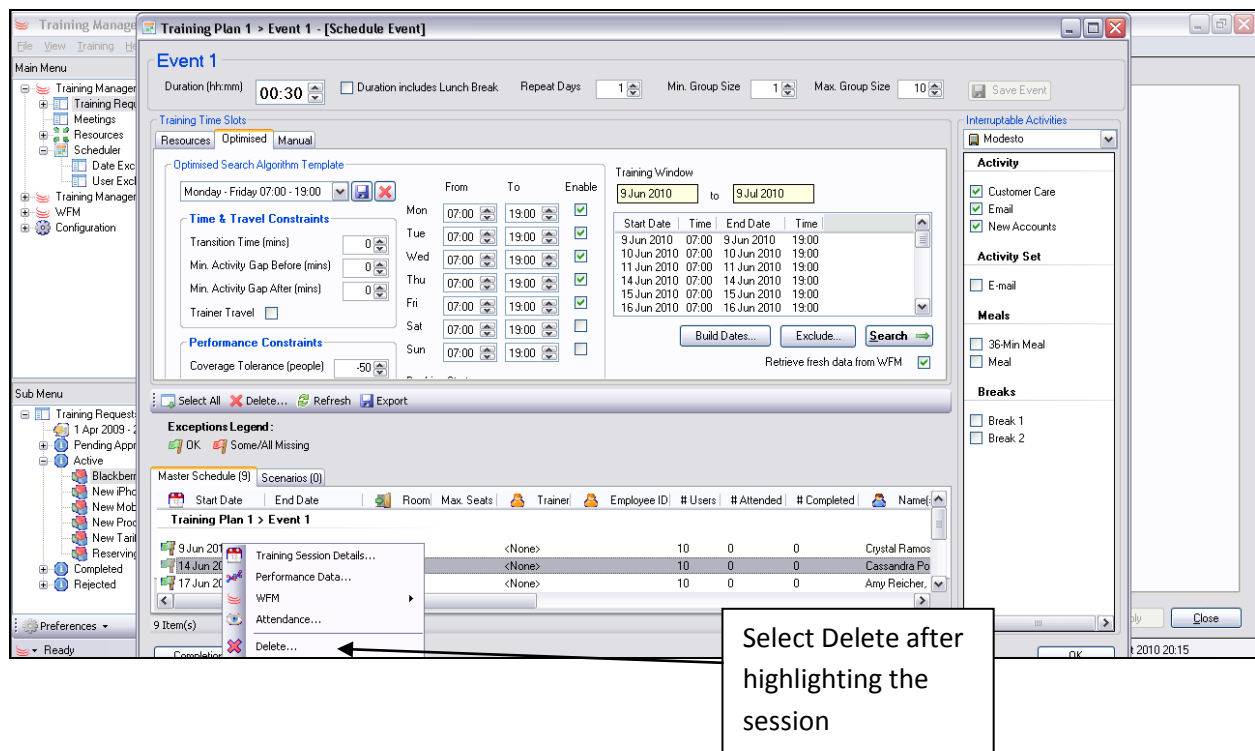
Genesys Scheduled Intra Day view.



Cancelling a Training Session(s)

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

To cancel a training session and remove the exceptions from Genesys WFM, highlight the training session to be cancelled and then right click and select Delete or use the  button.



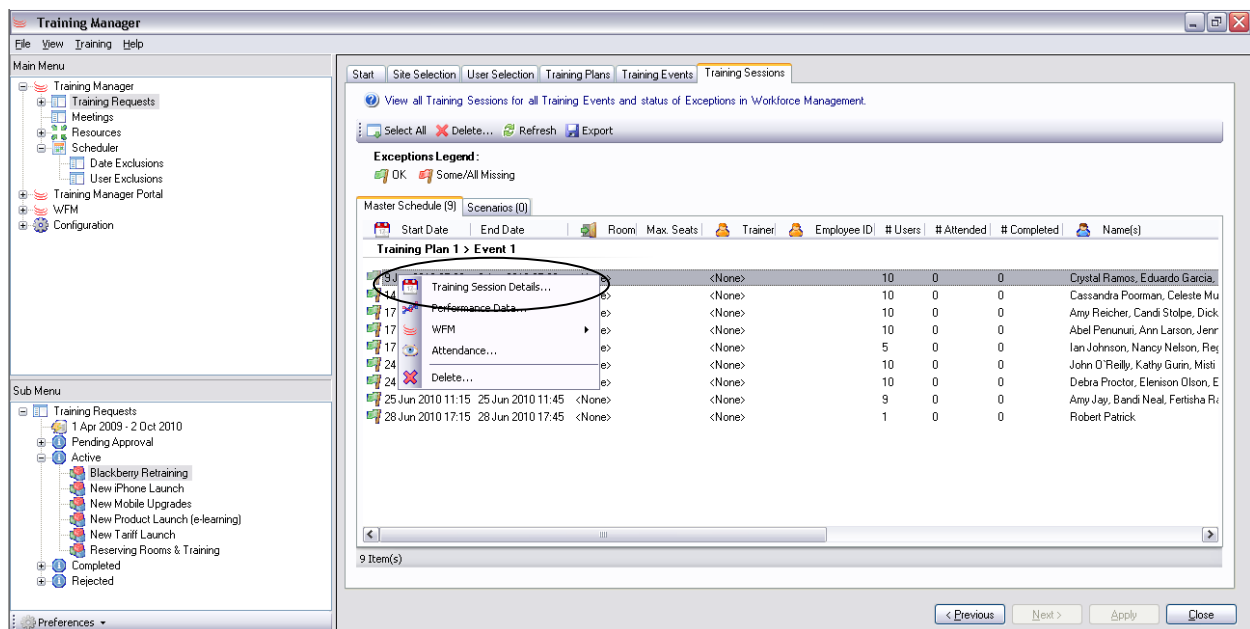
The session will be removed from the 'Training Sessions' window and the agents who were scheduled in for that session will be identified as unscheduled when viewed in the 'Completion Status Report'.

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

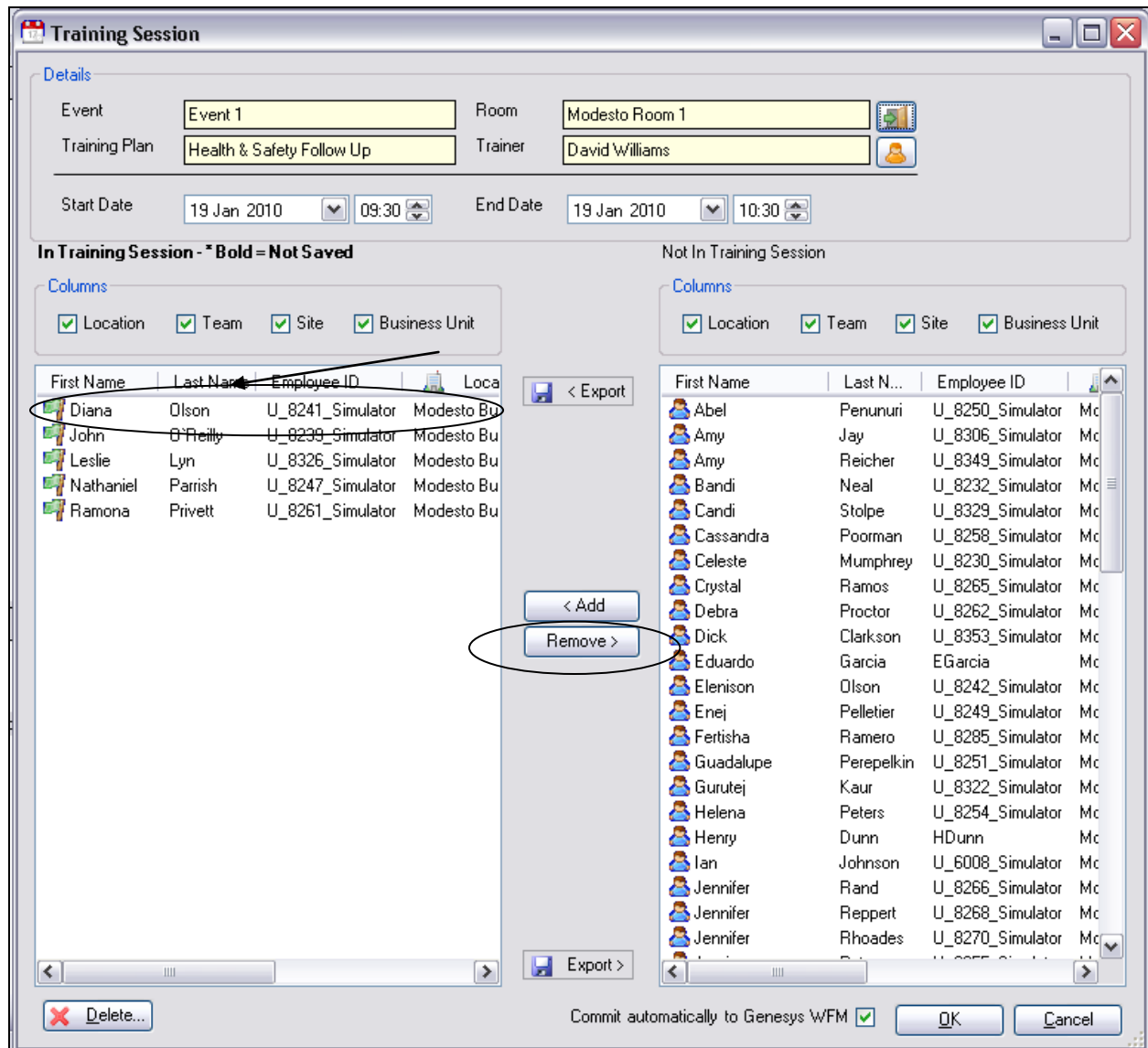
Cancelling a Training Session for an Individual

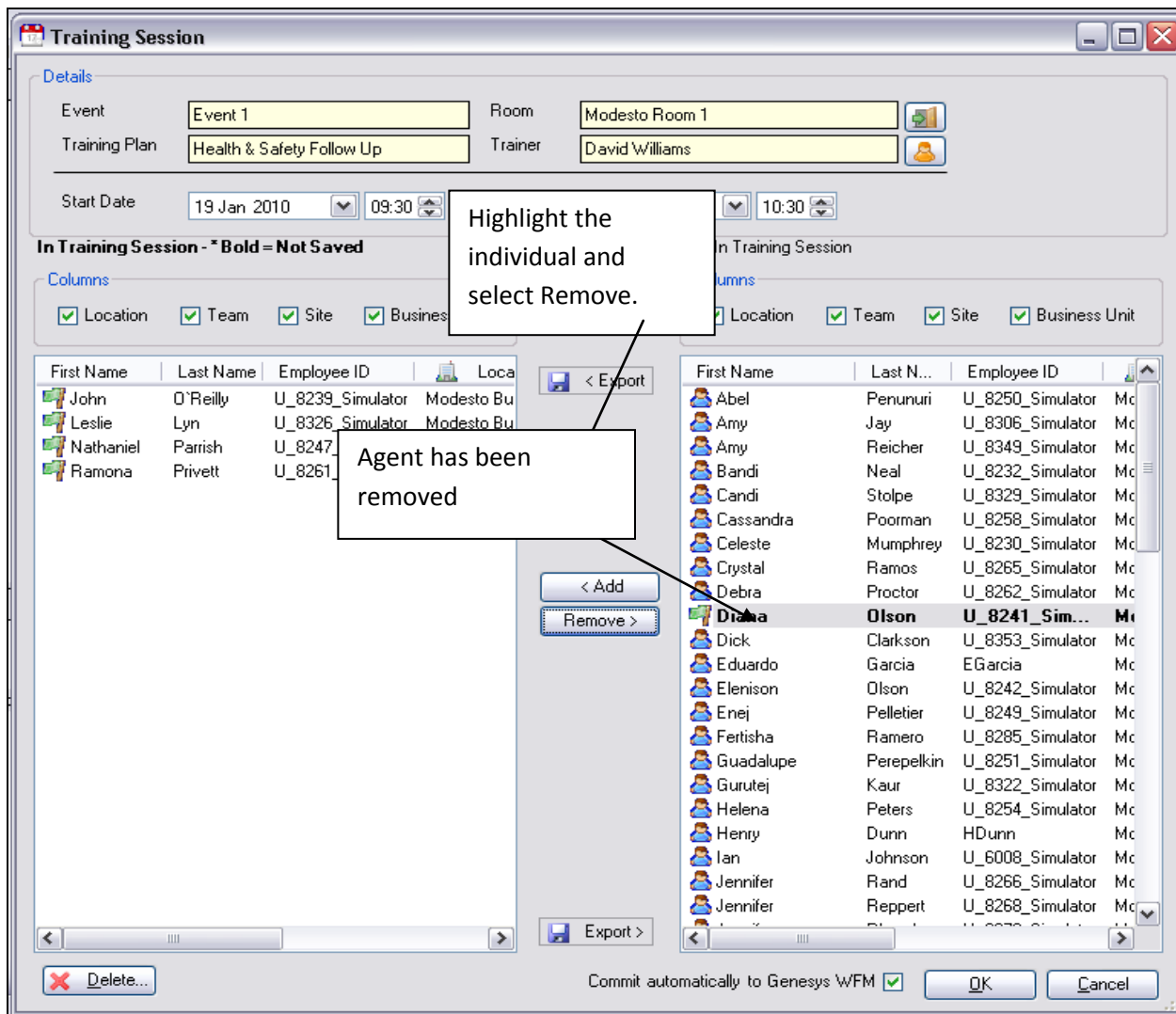
A training session can be cancelled for an individual by first expanding the training session, right click on the session and then select 'Training Session Details'. This will list all of the delegates for that training session together with the Room and Trainer if they have been scheduled as part of the training session see the example on the next page.

The training session can also be selected under the 'Training Plans' tab.

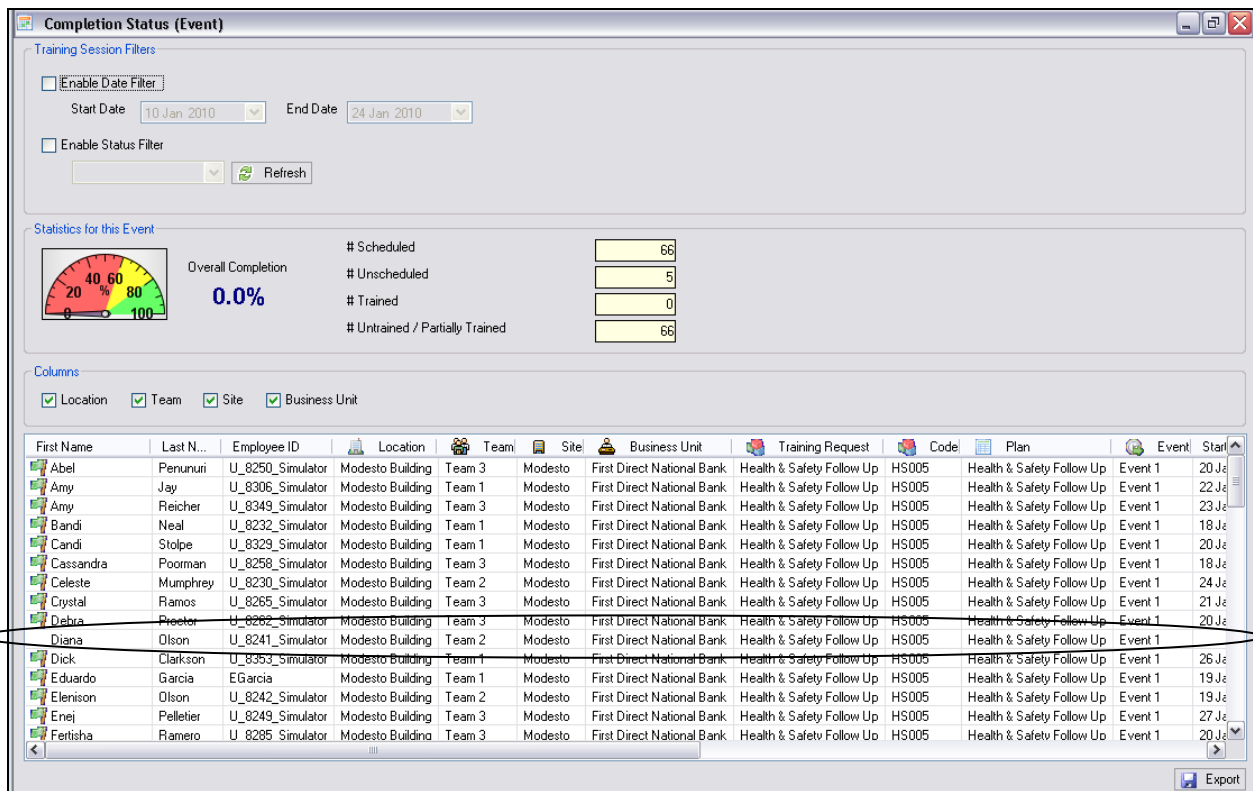


Once the agent details are visible in the 'Training Session Details' window users can be manually removed by highlighting the individual and selecting Remove. This will remove the user and put them in the right hand 'Not in Training Session' window.





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

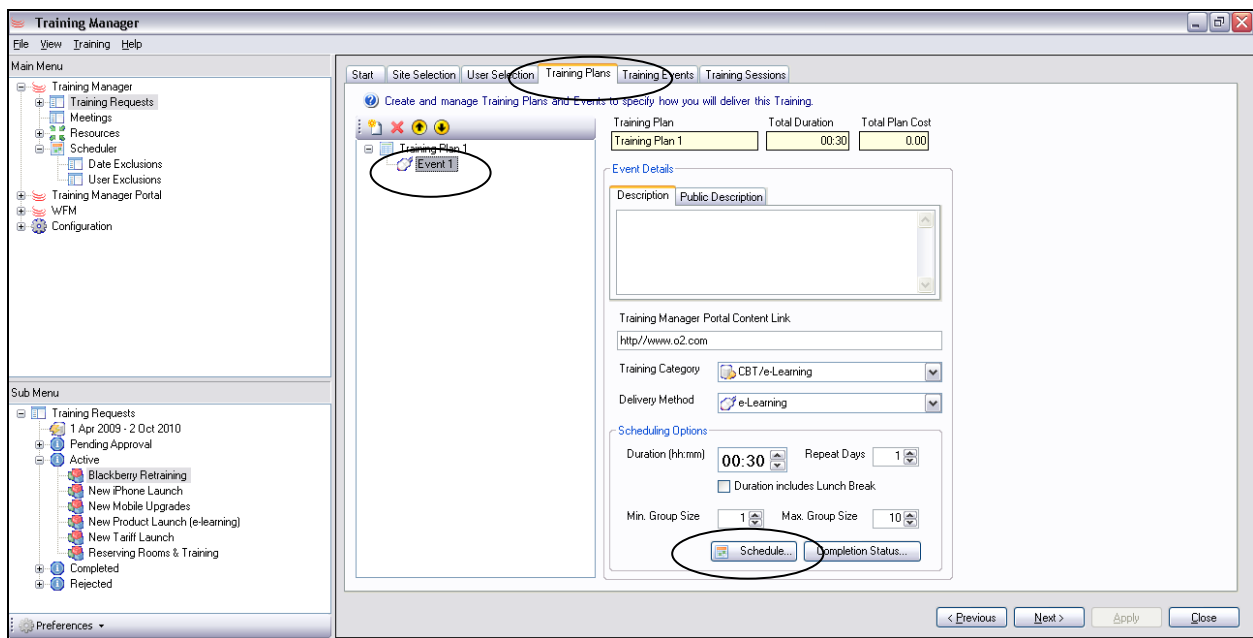


Agents that have not been scheduled or have not attended the training and need to be scheduled later will remain as part of the original training schedule and can then be scheduled as 'Mop Ups' if required.

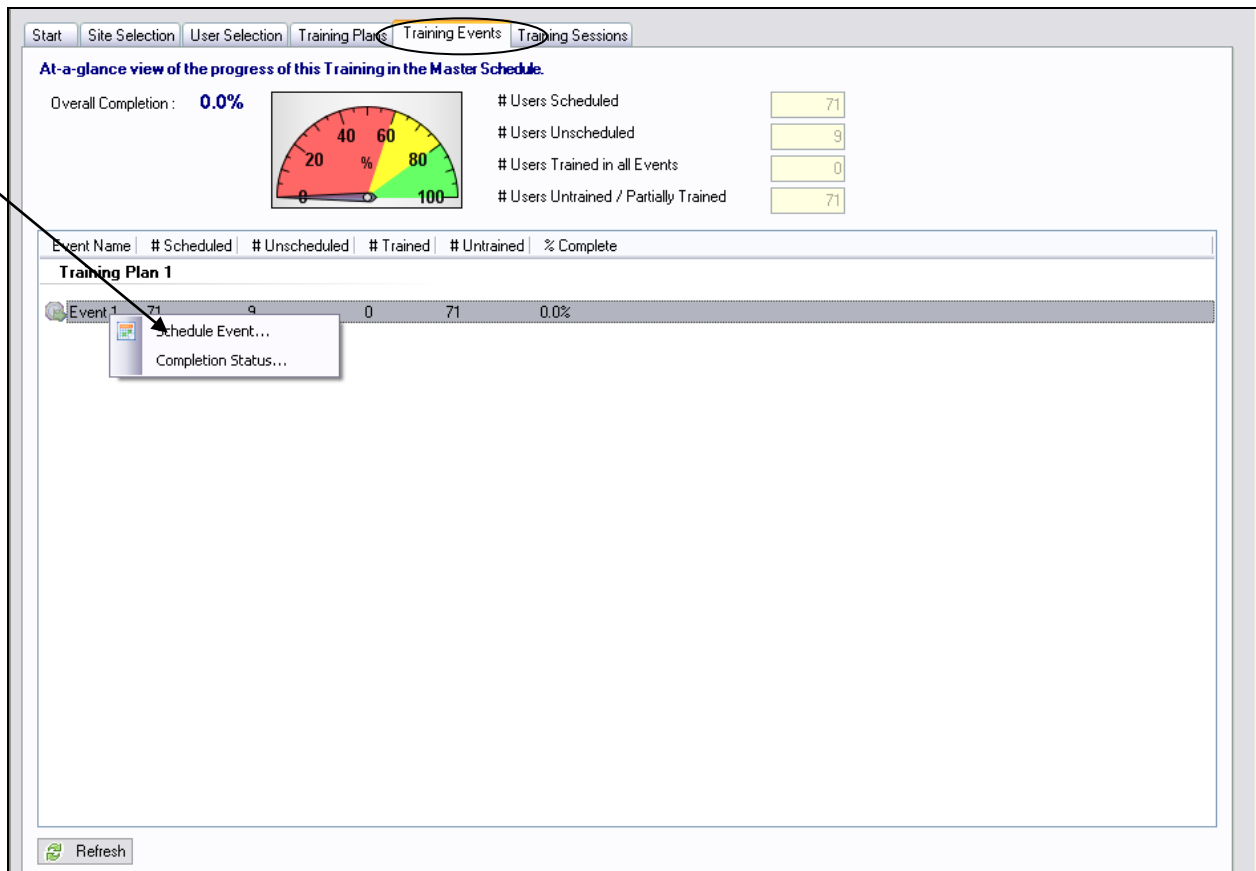
Scheduling Mop Ups

Agents can be scheduled as part of the original schedule using the 'Mop Up' process and 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 in 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. This can be accessed through the 'Training Plan' tab, select the 'Event' and then 'Schedule'.

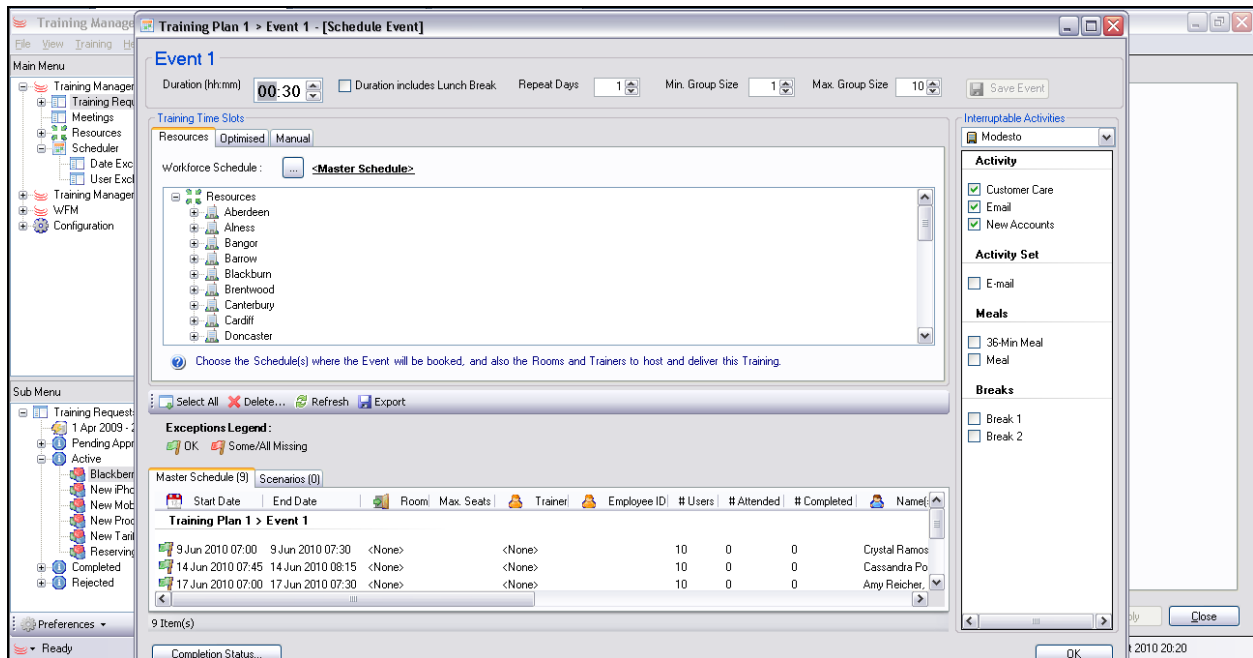


Or through the 'Training Events' tab and right click on the 'Event' and then 'Schedule Event...'



This will then present the 'Scheduler' with the original constraints and training schedules, see the example on the next page.

To re run the 'Scheduler', select 'Search' and the 'Scheduler' will schedule any unscheduled agents in to further training sessions, taking the original constraints into account.



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

In the example below Debra Proctor has been scheduled in for training and the red flag identifies that some or all of the training session are missing in the Master Schedule.

Completion Status (Event)

Status Filter

☐ Enable Status Filter

Refresh

Training Session Filter

☐ Enable Date Filter

Start Date End Date

First Name	Last N...	Employee ID	Start Date	End Date	Status	Train
Abel	Penunuri	U_8250_Simulator	9 Dec 2008 11:15	9 Dec 2008 13:15	Scheduled	
Amy	Jay	U_8306_Simulator	5 Dec 2008 11:45	5 Dec 2008 13:45	Scheduled	
Amy	Reicher	U_8349_Simulator	12 Dec 2008 11:45	12 Dec 2008 13:45	Scheduled	
Andrew	Faust	U_7004_Simulator			Unscheduled	
Ann	Larson	U_8224_Simulator	16 Dec 2008 11:30	16 Dec 2008 13:30	Scheduled	
Bandi	Neal	U_8232_Simulator	8 Dec 2008 11:15	8 Dec 2008 13:15	Scheduled	
Ben	Lin	U_8227_Simulator			Unscheduled	
Brian	Chen	U_7002_Simulator			Unscheduled	
Candi	Stolpe	U_8329_Simulator	3 Dec 2008 11:30	3 Dec 2008 13:30	Scheduled	
Cassandra	Poorman	U_8258_Simulator	5 Dec 2008 11:45	5 Dec 2008 13:45	Scheduled	
Celeste	Mumphrey	U_8230_Simulator	12 Dec 2008 10:15	12 Dec 2008 12:15	Scheduled	
Crystal	Ramos	U_8265_Simulator	8 Dec 2008 11:15	8 Dec 2008 13:15	Scheduled	
Debra	Proctor	U_8262_Simulator	16 Dec 2008 13:30	16 Dec 2008 15:30	Scheduled	
Diana	Olson	U_8241_Simulator	5 Dec 2008 11:45	5 Dec 2008 13:45	Scheduled	
Dick	Clarkson	U_8353_Simulator	15 Dec 2008 10:30	15 Dec 2008 12:30	Scheduled	
Eduardo	Garcia	EGarcia	16 Dec 2008 11:30	16 Dec 2008 13:30	Scheduled	
Elenison	Olson	U_8242_Simulator	3 Dec 2008 14:00	3 Dec 2008 16:00	Scheduled	
Enej	Pelletier	U_8249_Simulator	11 Dec 2008 13:00	11 Dec 2008 15:00	Scheduled	
Fertisha	Ramero	U_8285_Simulator	4 Dec 2008 13:15	4 Dec 2008 15:15	Scheduled	
Guadalupe	Perepelkin	U_8251_Simulator	5 Dec 2008 09:30	5 Dec 2008 11:30	Scheduled	

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

Training Plan 1 / Event 1 - [Schedule Event]

Event 1

Duration (hh:mm) **01:00** ☐ Duration includes Lunch Break Repeat Days **1** Min. Group Size **1** Max. Group Size **5**

Training Time Slots

Resources **Optimised** Manual

Optimisation Algorithm Template

Week days From To Enable

Time & Travel Constraints

Transition Time (minutes) **0**

Trainer Travel ☐

Performance Constraints

Coverage Tolerance **-500**

Maximum Team Offline (%) **100**

Retrieve fresh data from Genesys 7.5 ☒

Training Window

19 Jun 2009 to **29 Jun 2009**

Start Date	Time	End Date	Time
19 Jun 2009	07:00	19 Jun 2009	19:00
22 Jun 2009	07:00	22 Jun 2009	19:00
23 Jun 2009	07:00	23 Jun 2009	19:00
24 Jun 2009	07:00	24 Jun 2009	19:00
25 Jun 2009	07:00	25 Jun 2009	19:00
26 Jun 2009	07:00	26 Jun 2009	19:00
29 Jun 2009	07:00	29 Jun 2009	19:00

Interruptable Activities

Modesto

Activity

☒ Customer Care

☒ Email

☒ New Accounts

Activity Set

☐ E-mail

Meals

☐ 36-Min Meal

☐ Meal

Breaks

☐ Break 1

☐ Break 2

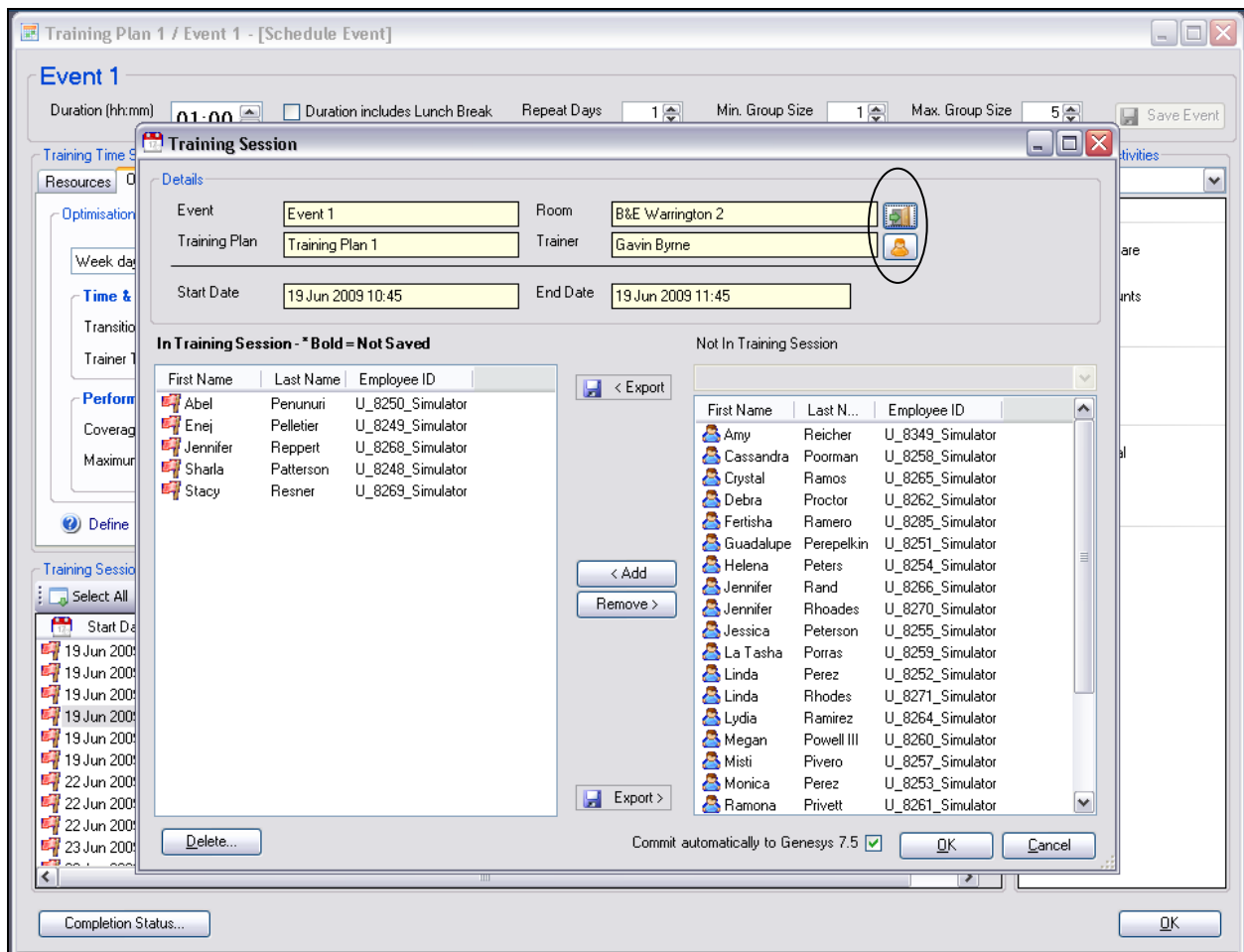
Training Sessions

Start Date	End Date	Schedule/Scenario	Room	Trainer	# Users	# Attended	# Completed	E
19 Jun 2009 07:00	19 Jun 2009 08:00	Master Schedule	B&E Warrington 3	Gavin Byrne	1	0	0	Training
19 Jun 2009 08:00	19 Jun 2009 09:00	Master Schedule	B&E Warrington 3	Gavin Byrne	2	0	0	Training
19 Jun 2009 08:15	19 Jun 2009 09:15	Master Schedule	B&E Warrington 5	Joe Thomas	1	0	0	Training
19 Jun 2009 10:45	19 Jun 2009 11:45	Master Schedule	B&E Warrington 2	Gavin Byrne	5	0	0	Training
19 Jun 2009 11:30	19 Jun 2009 12:30	Master Schedule	B&E Warrington 3	Joe Thomas	2	0	0	Training
19 Jun 2009 12:45	19 Jun 2009 13:45	Master Schedule	B&E Warrington 3	Gavin Byrne	3	0	0	Training
22 Jun 2009 07:00	22 Jun 2009 08:00	Master Schedule	B&E Warrington 5	Joe Thomas	1	0	0	Training
22 Jun 2009 08:15	22 Jun 2009 09:15	Master Schedule	B&E Warrington 5	Joe Thomas	1	0	0	Training
22 Jun 2009 09:30	22 Jun 2009 10:30	Master Schedule	B&E Warrington 5	Gavin Byrne	2	0	0	Training
23 Jun 2009 07:45	23 Jun 2009 08:45	Master Schedule	B&E Warrington 3	Gavin Byrne	1	0	0	Training

Trainer and Room Hot Swaps

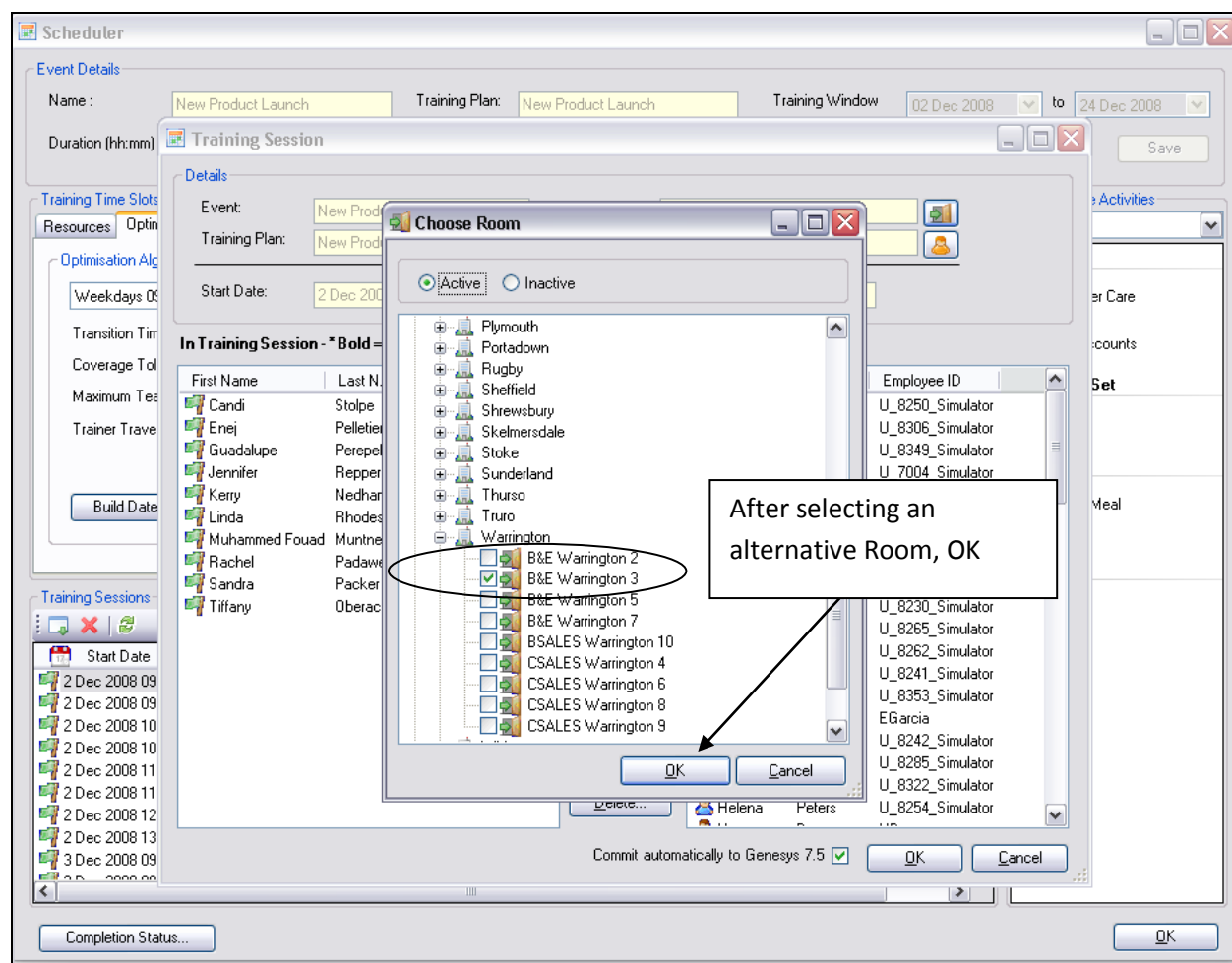
Trainers and / or rooms can be manually changed at any time within a scheduled training session.

To make any changes the Training Session Details window has to be visible, see the example below. To hot swap a Room or a Trainer click on the icon at the right hand side of the Room or Trainer and the tree view with the Trainer and Room details by Location is then presented; see the example on the next page.



In the example below 'Room' has been selected and the option to choose a different room is presented.

After selecting an alternative room, click on 'OK'.

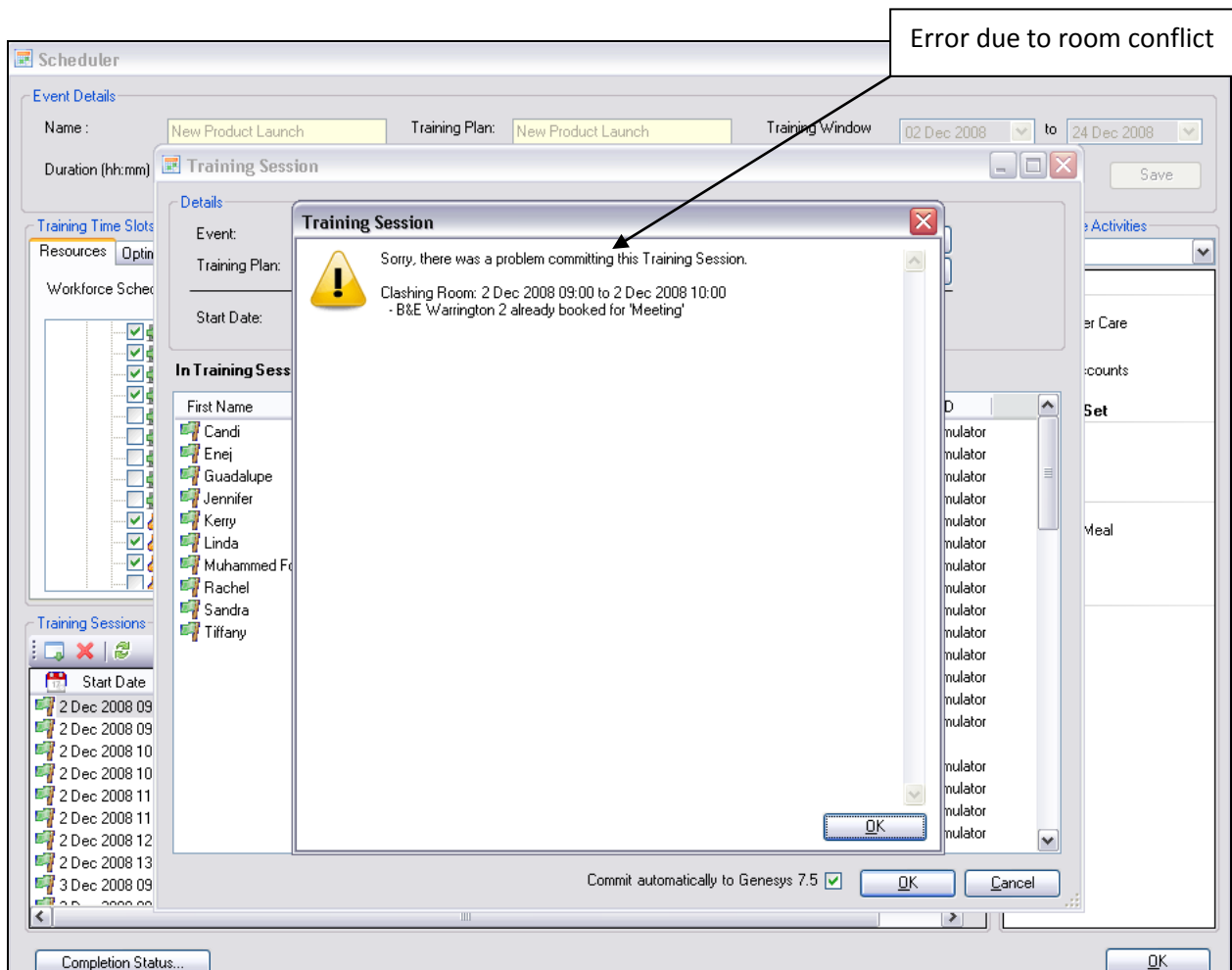


The application will then check to make sure that the room is available using the information in the 'Room Calendar' and it will also make sure that there is sufficient capacity for the number of users selected.

If the room is not available for any reason, an error will be displayed to the administrator to allow them to select another room, see 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.

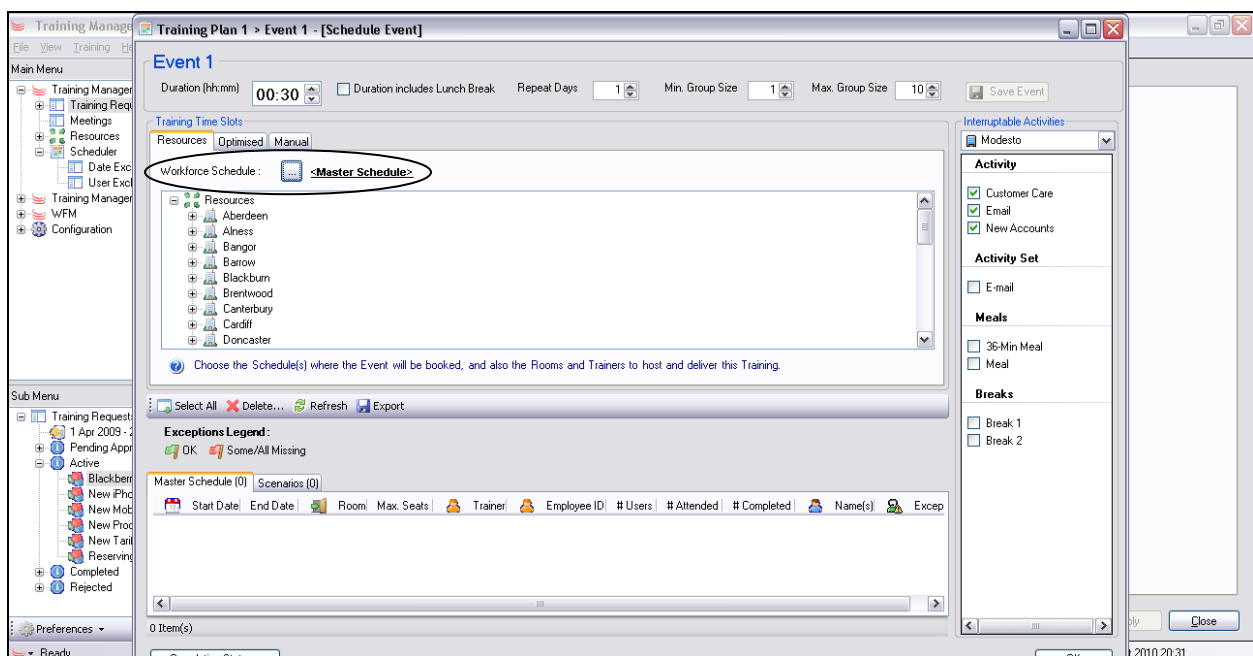
Apply the same process when changing the trainer.



Using Scenarios for 'What If' Scheduling

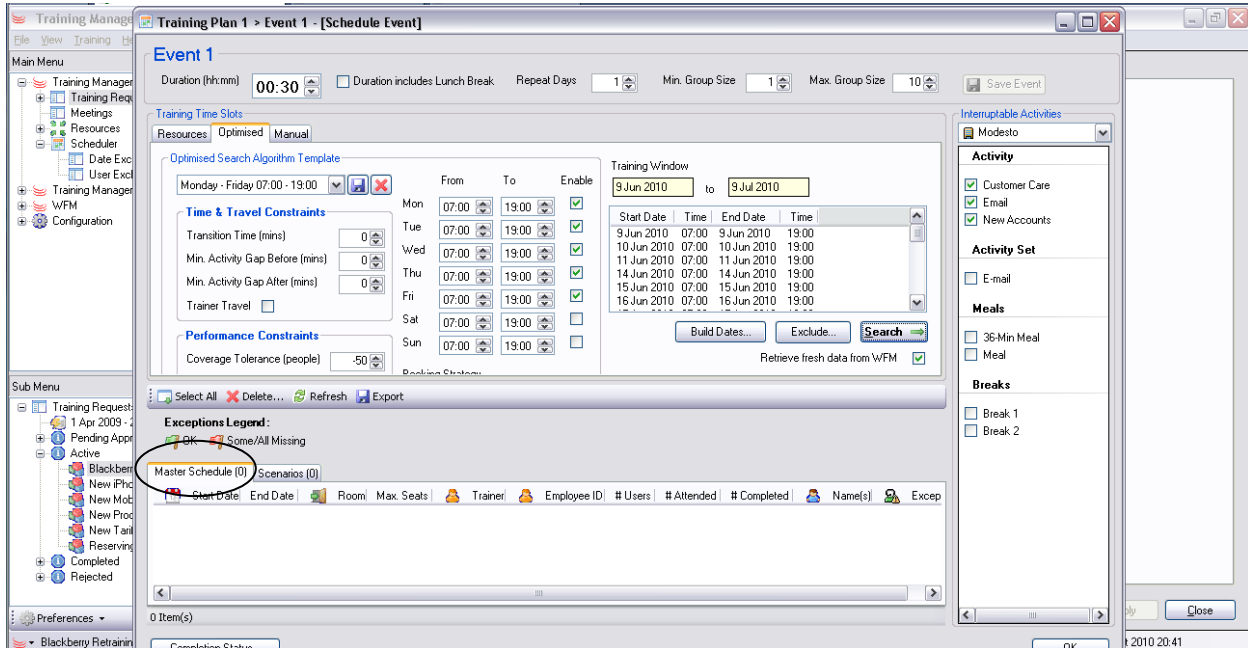
When using Scenarios to view the impact of the training before committing it into Genesys WFM, the process is exactly the same up to the 'Resources' tab. In the 'Workforce Schedule' select the required Scenario from the list of available Scenarios in WFM. In this example multiple Scenarios have been selected to cover the training window.

Note: It is important to remember that the Scenario selected **MUST** match the date range in the training window. If the Scenario does not match Genesys Training Manager will use the Master Schedule to schedule against.

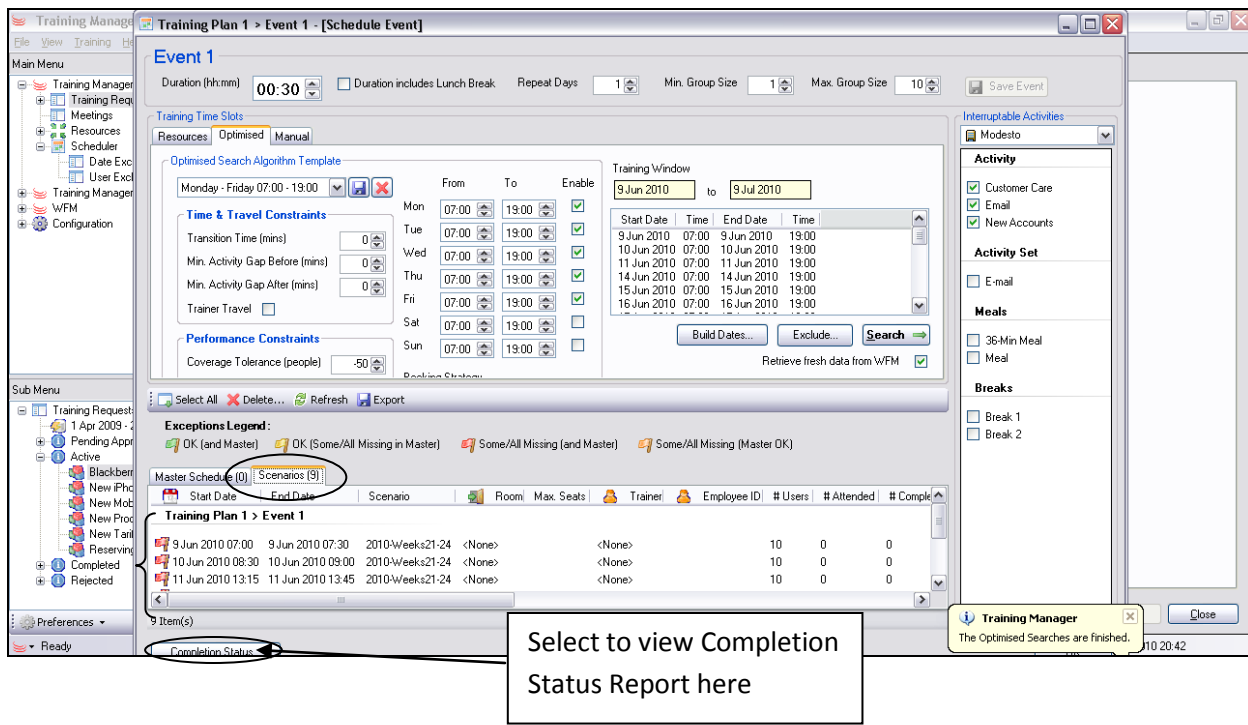


After selecting the Scenario, continue as normal selecting 'Search' once all of the information has been entered.

Once the schedule has been completed the suggested training sessions will be displayed in the 'Training Sessions' window. By default Genesys Training Manager always displays the Master Schedule tab and to view any training sessions using a Scenario click on the Scenario tab, otherwise there will be nothing visible.

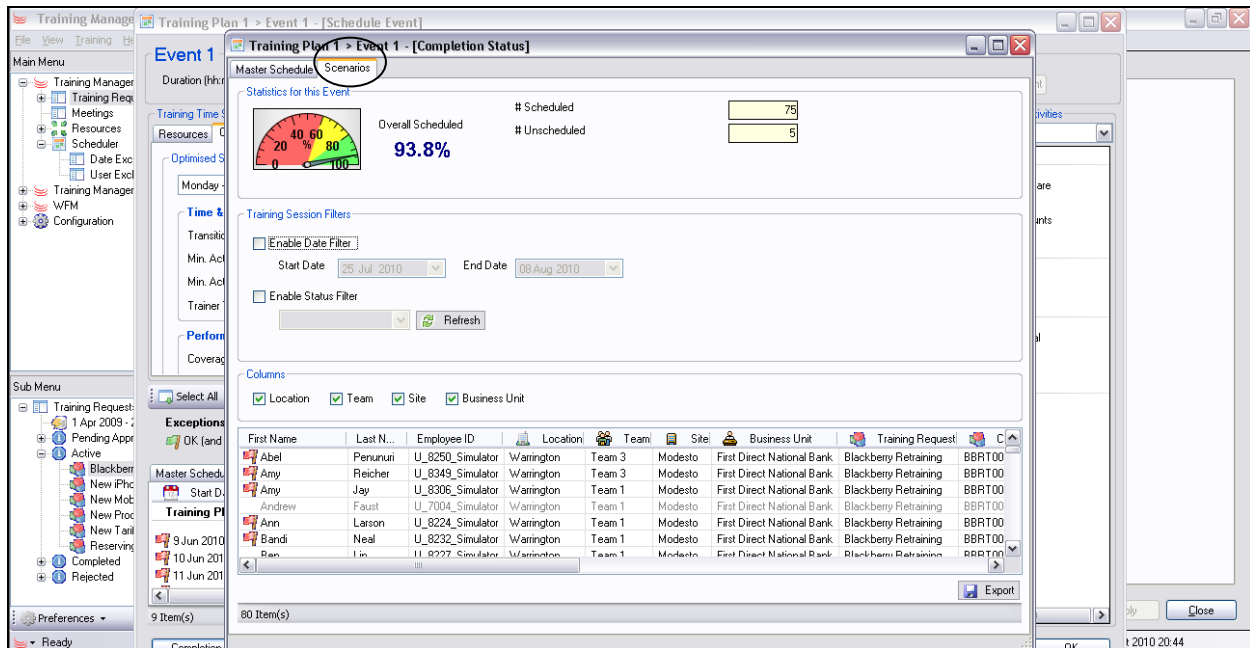


Scenario tab



The Completion Status Report can be viewed at this stage to see how successful Genesys Training Manager has been in scheduling any training sessions.

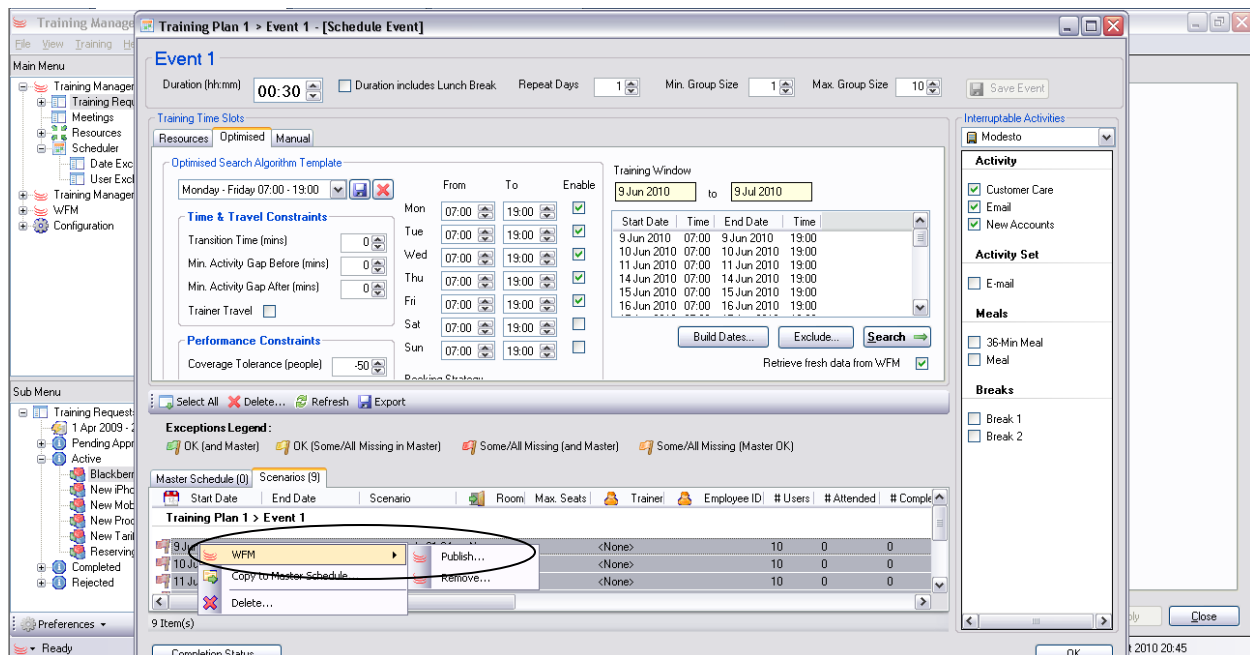
In this example it clearly identifies that the results are for the Scenario.



To publish the training sessions into the Genesys Scenario select the training sessions and then right click for 'Genesys WFM' and then 'Publish'

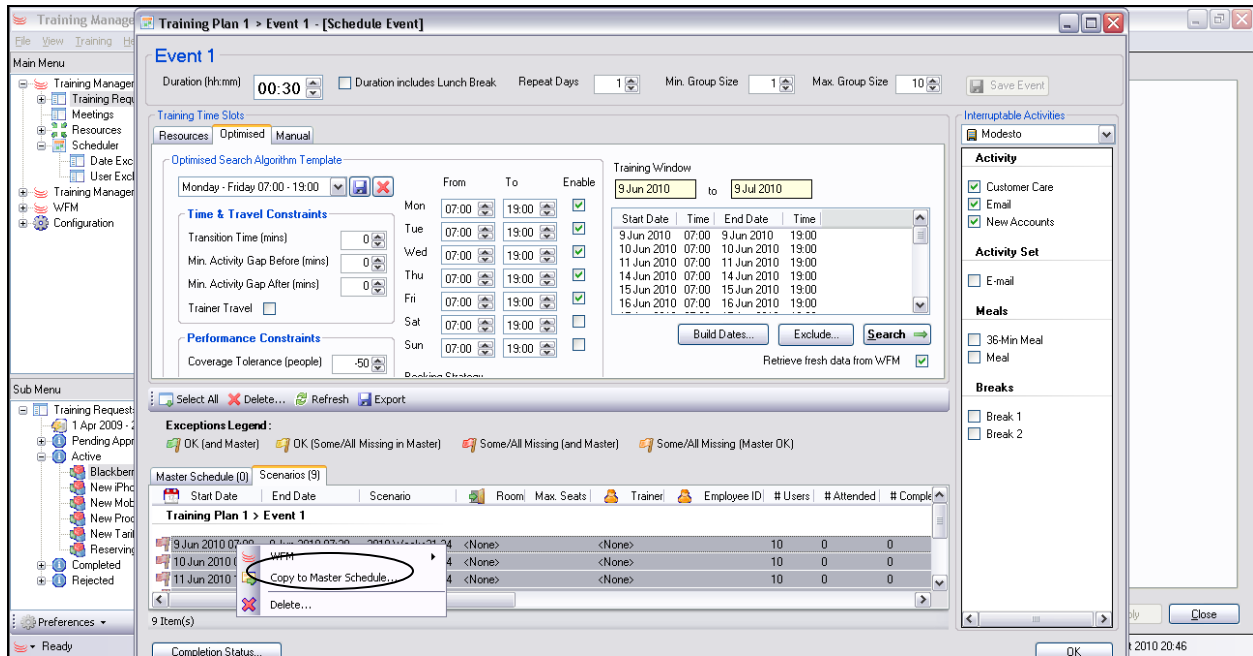
Once the training sessions have been published the flags at the left hand side of the training sessions will change color.

Note: Committing to Genesys WFM in the Scenario tab will only commit to the Genesys Scenario.

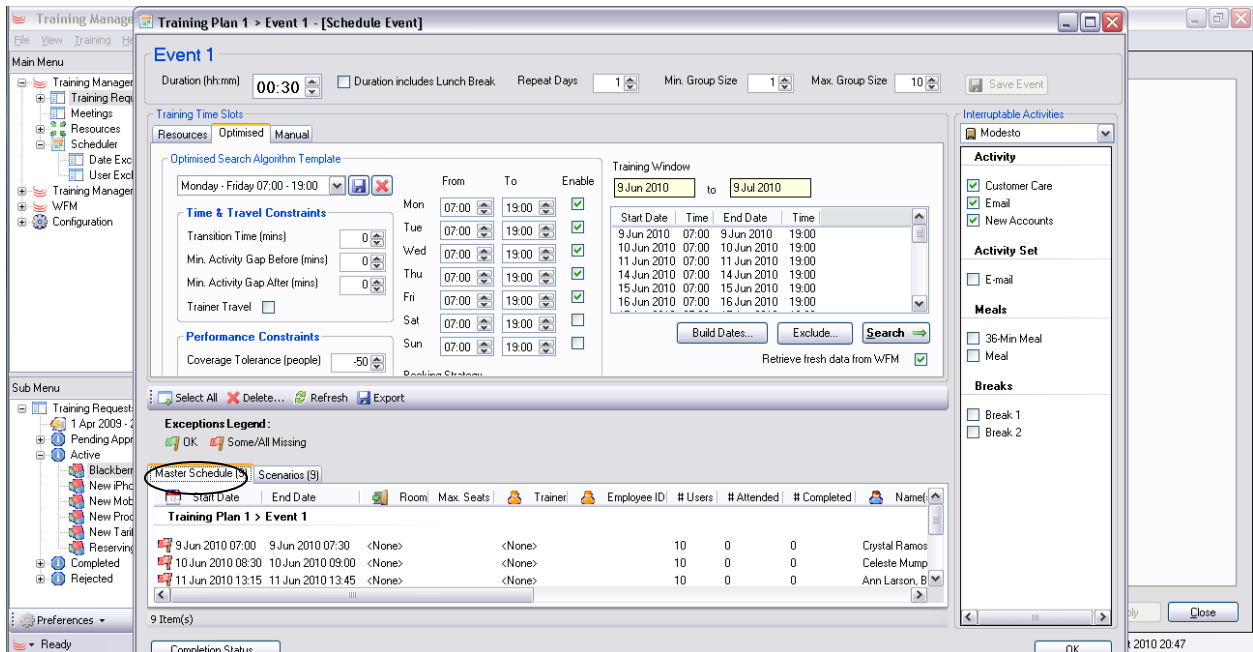


Once the training sessions have been published to the Scenario, there is an option to remove the training sessions without deleting them by selecting 'Remove'.

To copy the training sessions across to the Genesys Training Manager Master Schedule for publishing into the Genesys WFM Master Schedule again select the training sessions and then 'Copy to Master Schedule'.

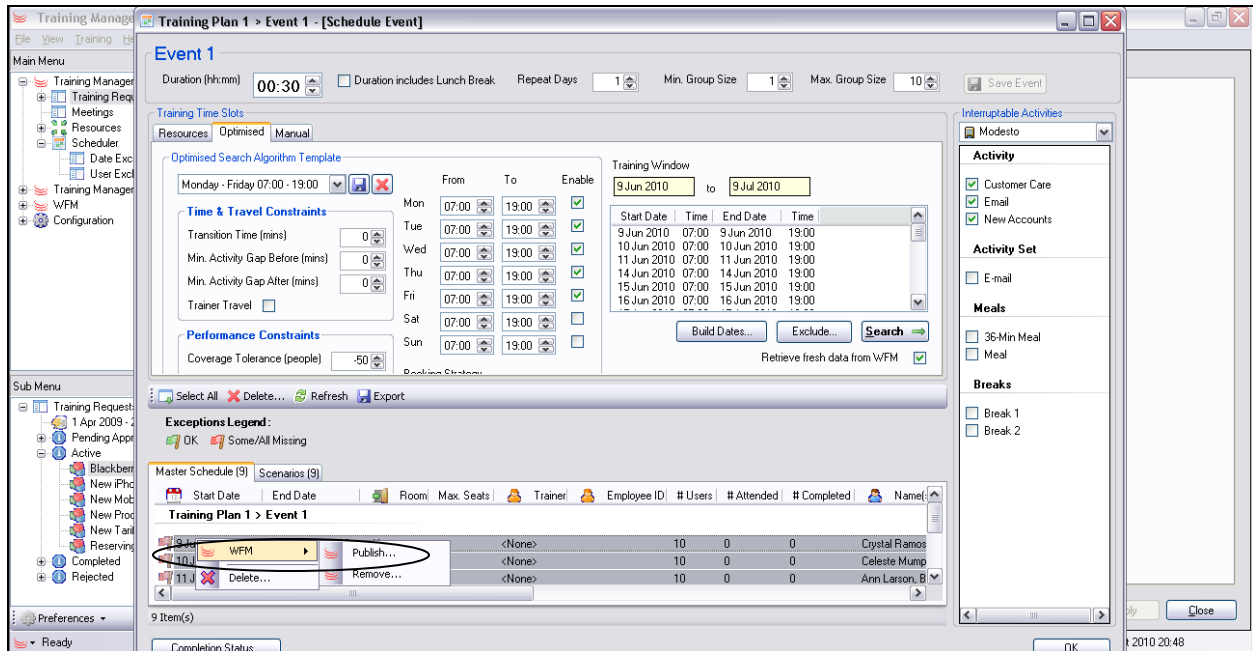


The training sessions will then be visible in the Master Schedule tab only after clicking on the tab.



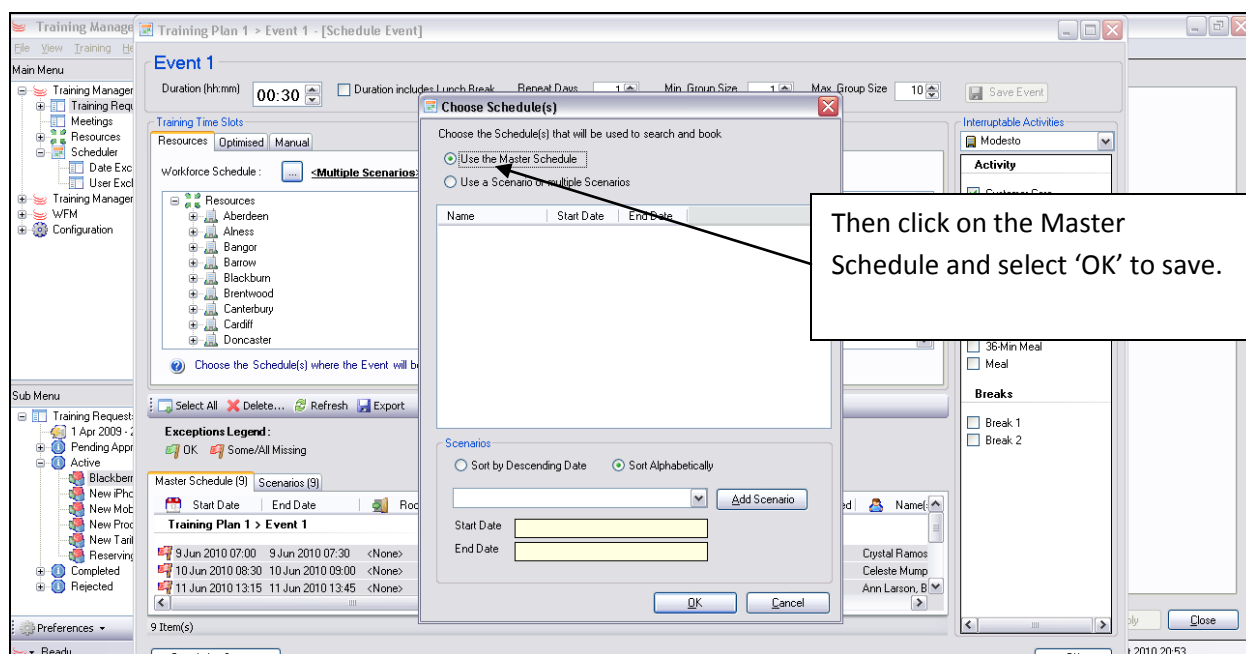
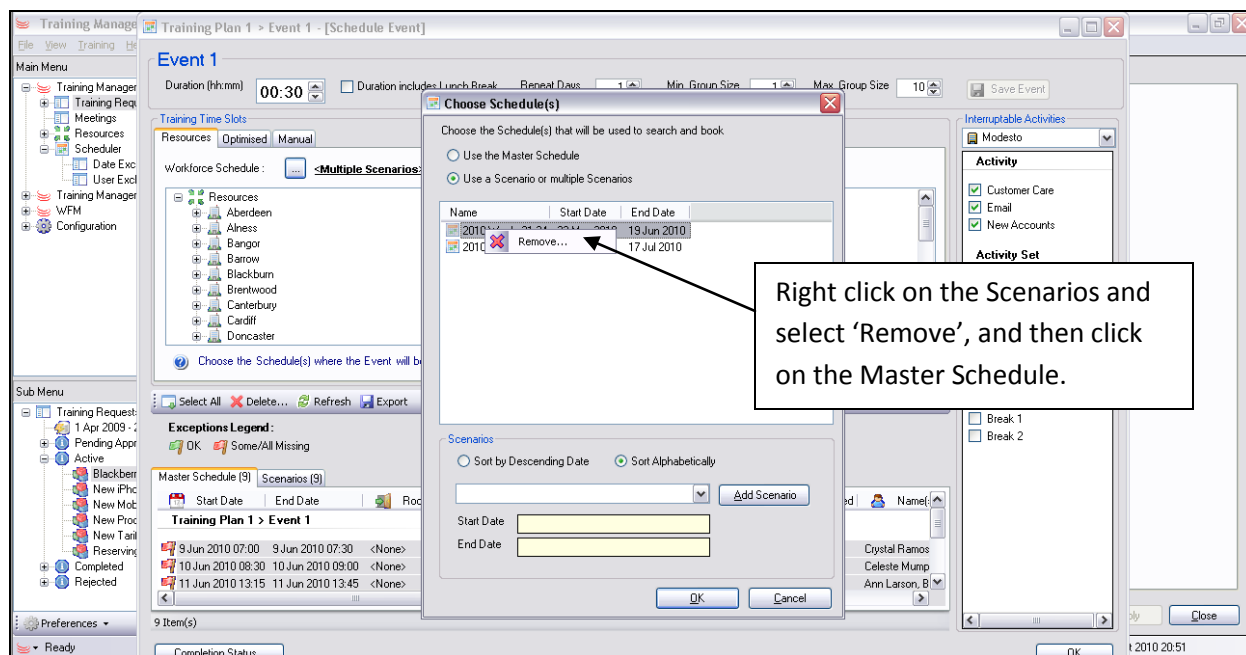
To commit the training session into Genesys WFM Master Schedule select the training sessions and then right click 'Genesys WFM' and then 'Publish'.

The same option is available to remove the training sessions in Genesys WFM without deleting them by selecting 'Genesys WFM' and then 'Remove'.

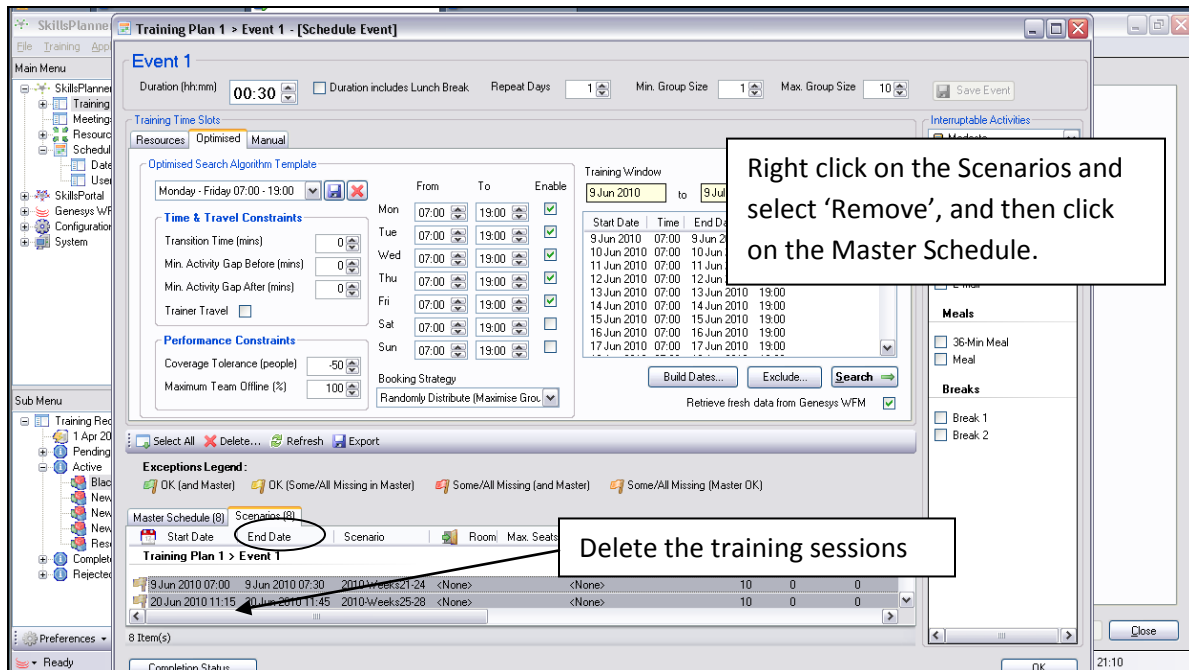


Once the training session have been committed into the Genesys Training Manager / Genesys Master Schedule to continue scheduling using the Scenario the training sessions MUST be deleted in the Master Schedules. Therefore select the Master Schedule training sessions and then 'Delete'.

To continue using the Training Request directly with the Master Schedule in Genesys WFM then the Scenario **MUST** be changed to the Master Schedule in the 'Resources' tab.



AND delete any training session in Scenario tab.



Manual Scheduling

This option is available in Genesys Training Manager however we see the usage being very limited if at all and would recommend that the 'Optimization Algorithm Template' be used.

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.

Training Plan 1 / Event 1 - [Schedule Event]

Event 1

Duration (hh:mm) **01:00** ☐ Duration includes Lunch Break Repeat Days **1** Min. Group Size **1** Max. Group Size **5** **Save Event**

Training Time Slots

Resources Optimised **Manual**

Start Date: **19 Jun 2009** **Performance Data**

Site: **Modesto**

Start Time	End	# Users
------------	-----	---------

Search **Show Detail...**

Find slots manually for Training delivery.

Interruptable Activities

Modesto

Activity

- ☒ Customer Care
- ☒ Email
- ☒ New Accounts

Activity Set

- ☐ E-mail

Meals

- ☐ 36-Min Meal
- ☐ Meal

Breaks

- ☐ Break 1
- ☐ Break 2

Training Sessions

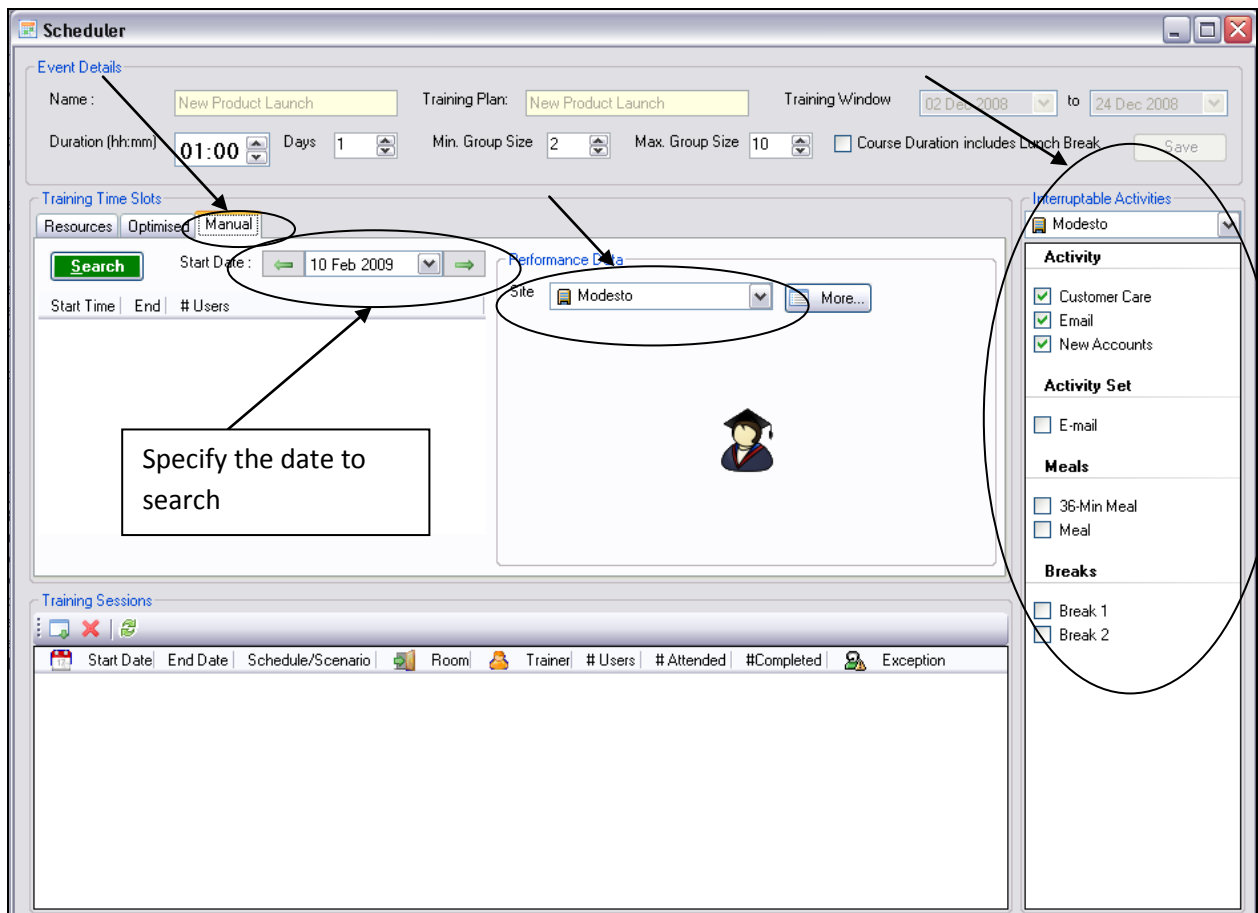
Select All Delete... Refresh Export...

Start Date	End Date	Schedule/Scenario	Room	Trainer	# Users	# Attended	# Completed	Exception
------------	----------	-------------------	------	---------	---------	------------	-------------	-----------

Completion Status... **OK**

Ready

Select 'Manual' from the tabs available and the 'Training Time Slots' window will change as per the example below.



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 and this can be amended if required.

In the 'Interruptible Activities' window the activities still need to be selected that the application can schedule training into and in the 'Performance Data' window the 'Site' or 'Scheduling Pot' needs to be selected.

The date to search for users who fit the training criteria needs to be specified from the calendar pull down box and then select 'Search'.

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

By highlighting one of the time slots and selecting 'More' this will provide the performance data for that time slot.

As each training time slot has associated performance data this allows the Administrator to view each time slot before making an informed decision when to schedule training.

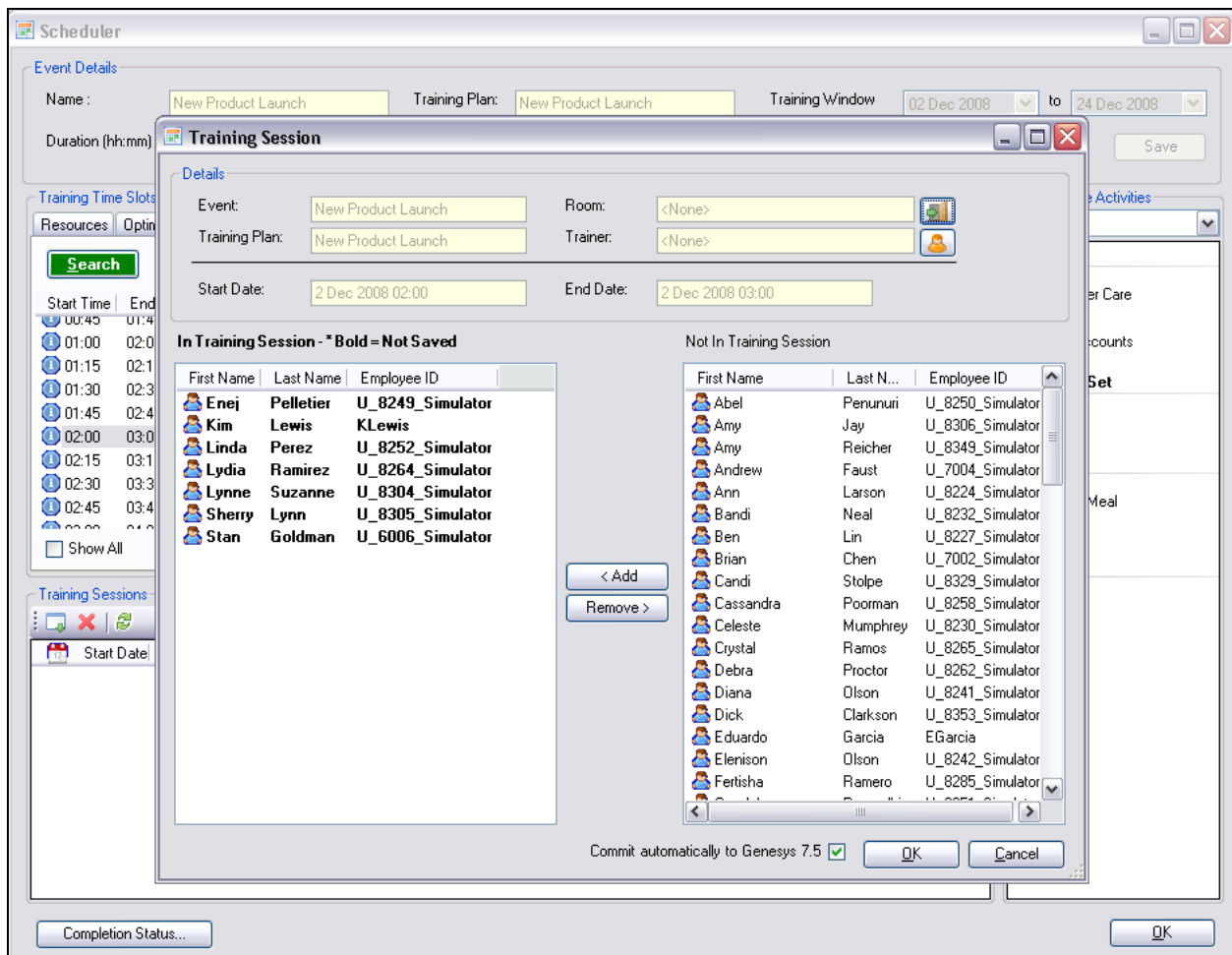
The first screenshot shows the 'Training Plan 1 > Event 1 - [Schedule Event]' window. A callout box labeled 'Highlight time slot' points to the 10:45 slot in the 'Training Time Slots' table. The 'Performance Data' graph shows a blue bar for 'Staffing Calc.' and a red line for 'Coverage'. A 'Show Detail' button is circled, with an arrow pointing to the second screenshot.

The second screenshot shows the 'Performance Data' table for the 10:45 slot. The table has the following data:

Date/Time	Coverage	Staffing Calc.	Diff. Calc.	Staffing Req.	Diff. Req.	Service Level	ASA
1 Aug 2010 10:45	17.0	42	-25.0	0	17.0	36	244
1 Aug 2010 11:00	18.0	42	-24.0	0	18.0	39	243

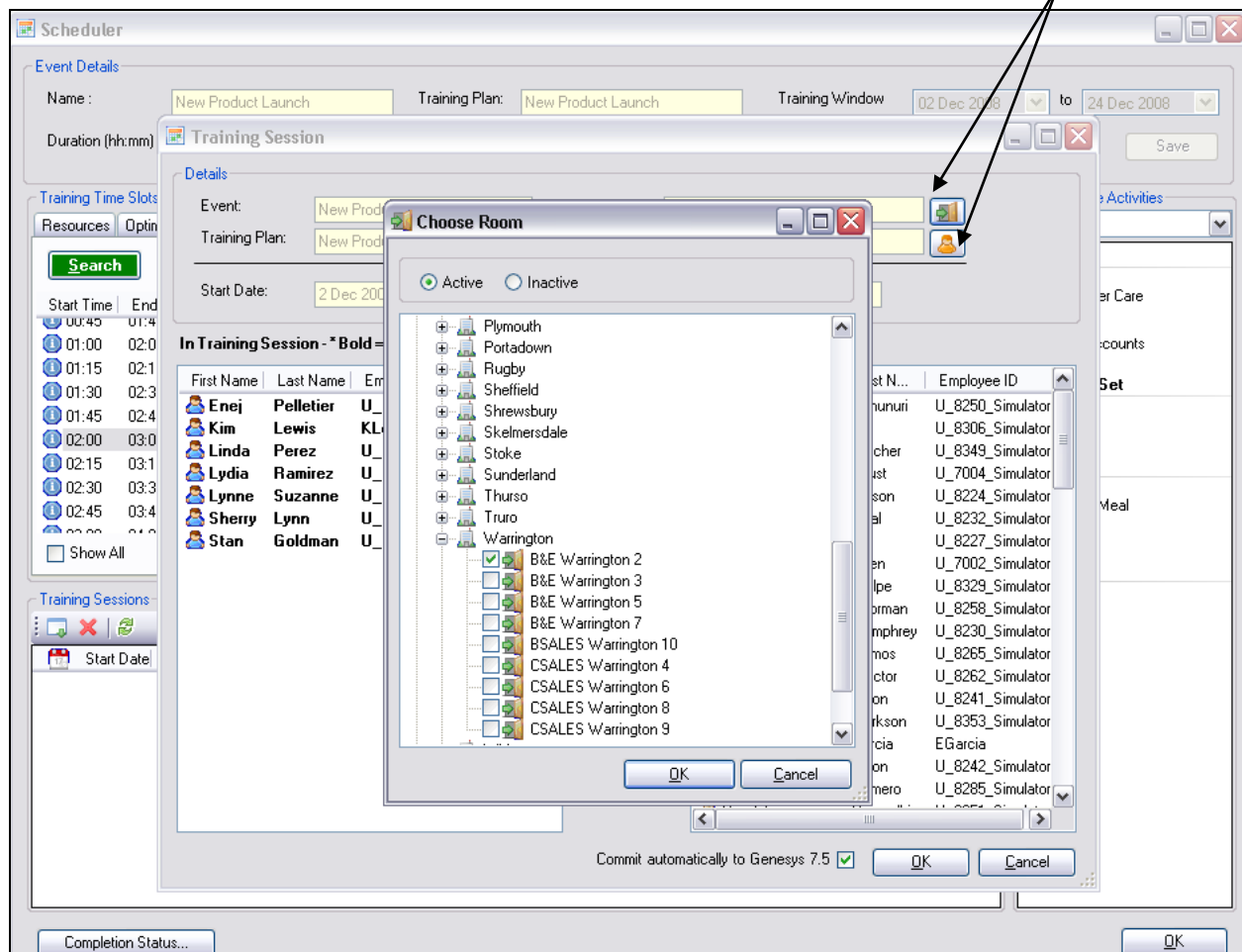
The 'Show Detail' button is now disabled, and the 'Performance Data' table is visible. The 'Exceptions Legend' and 'Master Schedule' sections are also visible.

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



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

Room and Trainer icons



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

Training Session

Details

Event: Room:

Training Plan: Trainer:

Start Date: End Date:

In Training Session - * Bold = Not Saved

First Name	Last Name	Employee ID
Enej	Pelletier	U_8249_Simulator
Kim	Lewis	KLewis
Linda	Perez	U_8252_Simulator
Lydia	Ramirez	U_8264_Simulator
Lynne	Suzanne	U_8304_Simulator
Sherry	Lynn	U_8305_Simulator
Stan	Goldman	U_6006_Simulator

< Add
Remove >

Not In Training Session

First Name	Last N...	Employee ID
Abel	Penunuri	U_8250_Simulator
Amy	Jay	U_8306_Simulator
Amy	Reicher	U_8349_Simulator
Andrew	Faust	U_7004_Simulator
Ann	Larson	U_8224_Simulator
Bandi	Neal	U_8232_Simulator
Ben	Lin	U_8227_Simulator
Brian	Chen	U_7002_Simulator
Candi	Stolpe	U_8329_Simulator
Cassandra	Poorman	U_8258_Simulator
Celeste	Mumphrey	U_8230_Simulator
Crystal	Ramos	U_8265_Simulator
Debra	Proctor	U_8262_Simulator
Diana	Olson	U_8241_Simulator
Dick	Clarkson	U_8353_Simulator
Eduardo	Garcia	EGarcia
Elenison	Olson	U_8242_Simulator
Fertisha	Ramero	U_8285_Simulator

Commit automatically to Genesys 7.5 ☒

OK Cancel

Once completed, select OK

The created training session will then be visible in the 'Training Session' window.

Scheduler

Event Details

Name: Training Plan: Training Window: to

Duration (hh:mm) Days Min. Group Size Max. Group Size ☐ Course Duration includes Lunch Break

Training Time Slots

Resources Optimised Manual

Start Date:

Start Time End # Users

Tuesday, 2 December 2008

00:15	01:15	2
00:30	01:30	2
00:45	01:45	2
01:00	02:00	2
03:00	04:00	6
03:15	04:15	3
03:30	04:30	4

☐ Show All

Performance Data

Site:

■ Coverage ■ Staffing Calc.

Interruptable Activities

Activity

☒ Customer Care
☒ Email
☒ New Accounts

Activity Set

☐ E-mail

Meals

☐ 36-Min Meal
☐ Meal

Breaks

☐ Break 1
☐ Break 2

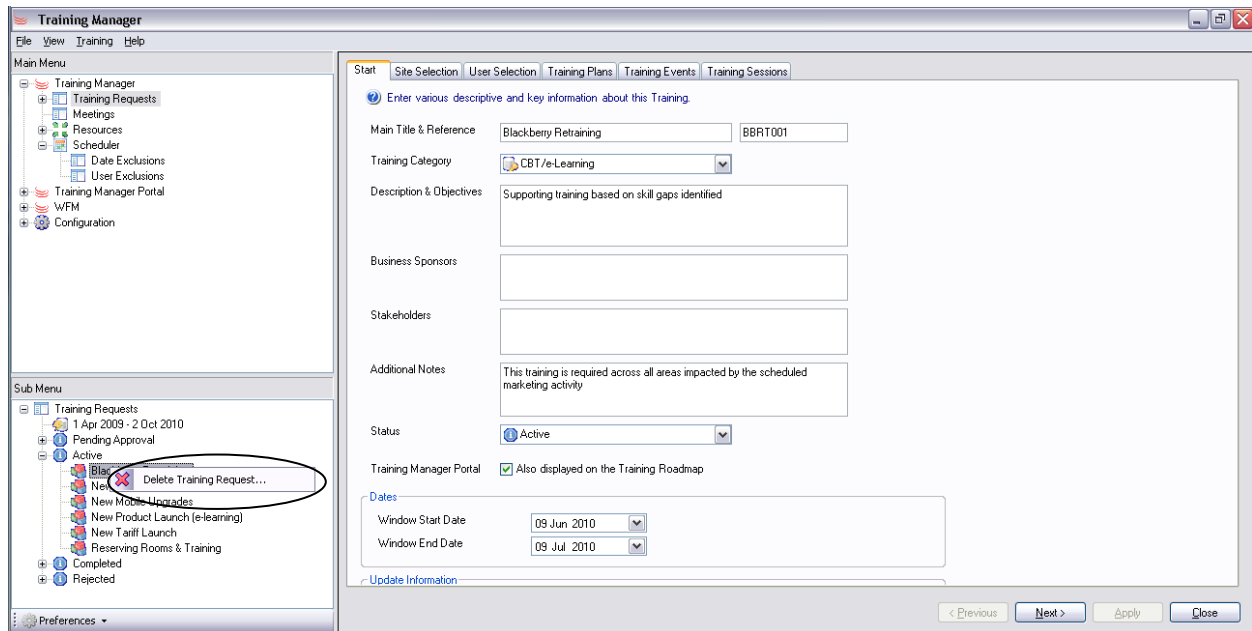
Training Sessions

Start Date	End Date	Schedule/Scenario	Room	Trainer	# Users	# Attended	# Completed	Ex
2 Dec 2008 02:00	2 Dec 2008 03:00	Master Schedule	B&E Warrington 2	Alyson Bushel	7	0	0	Training

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

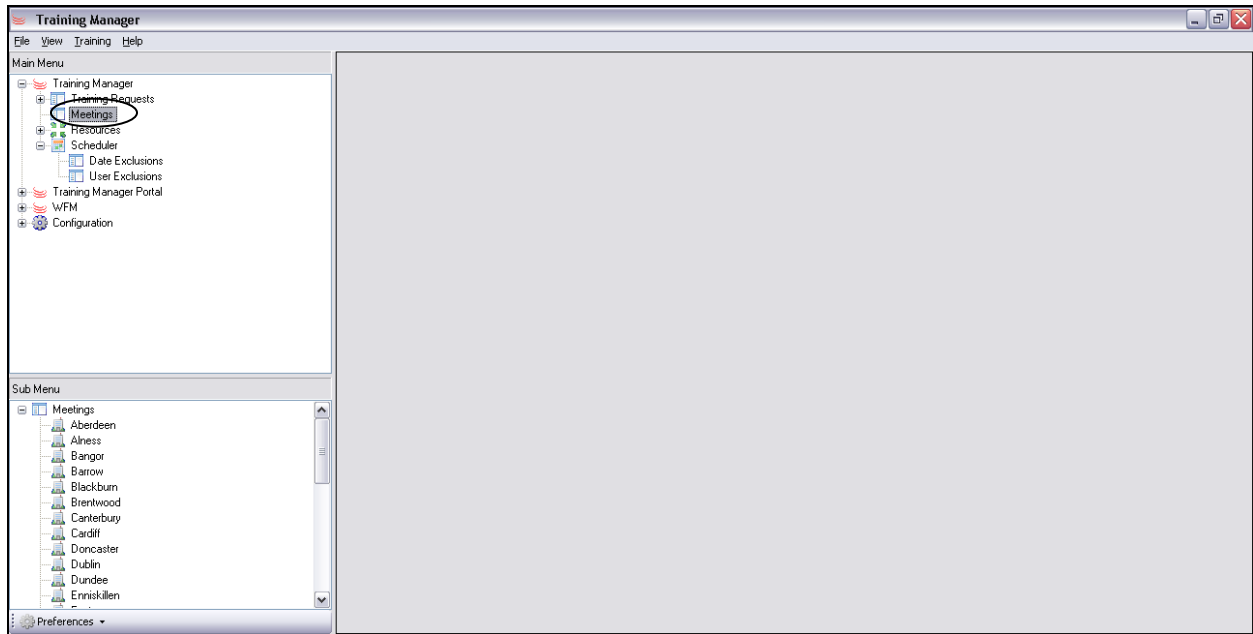
Deleting a Training Request

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



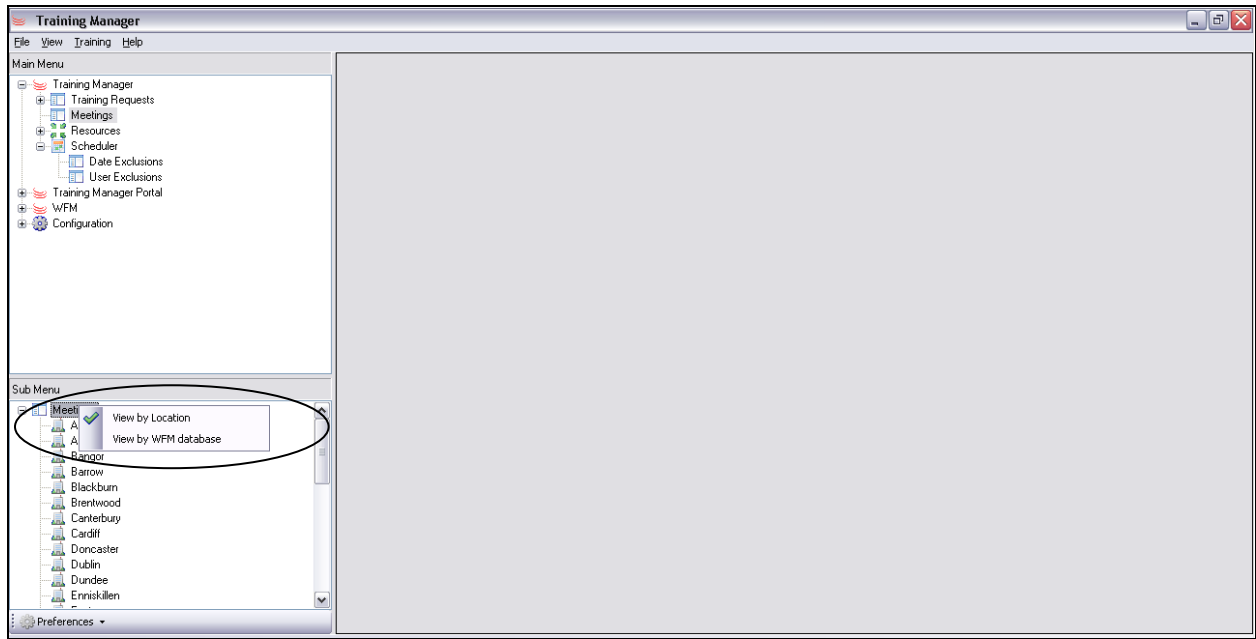
Create Meetings

To create a meeting, select 'Meetings' from the Main Menu and it is the same process for creating Team Meetings, Team Huddles & One to Ones.

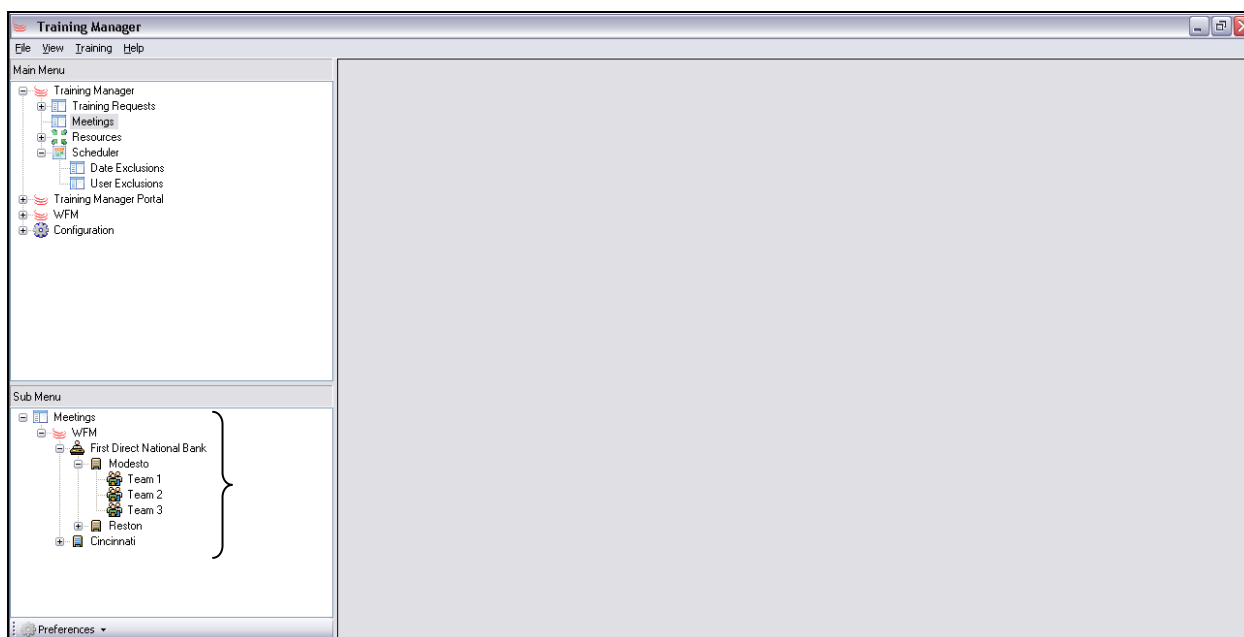


In the Sub Menu a list of the locations will appear. The view can be changed to show the Genesys WFM database by right clicking on 'Meetings' in the Sub Menu.

The view will change in the Sub Menu to present the WFM database as per the example on the next page.

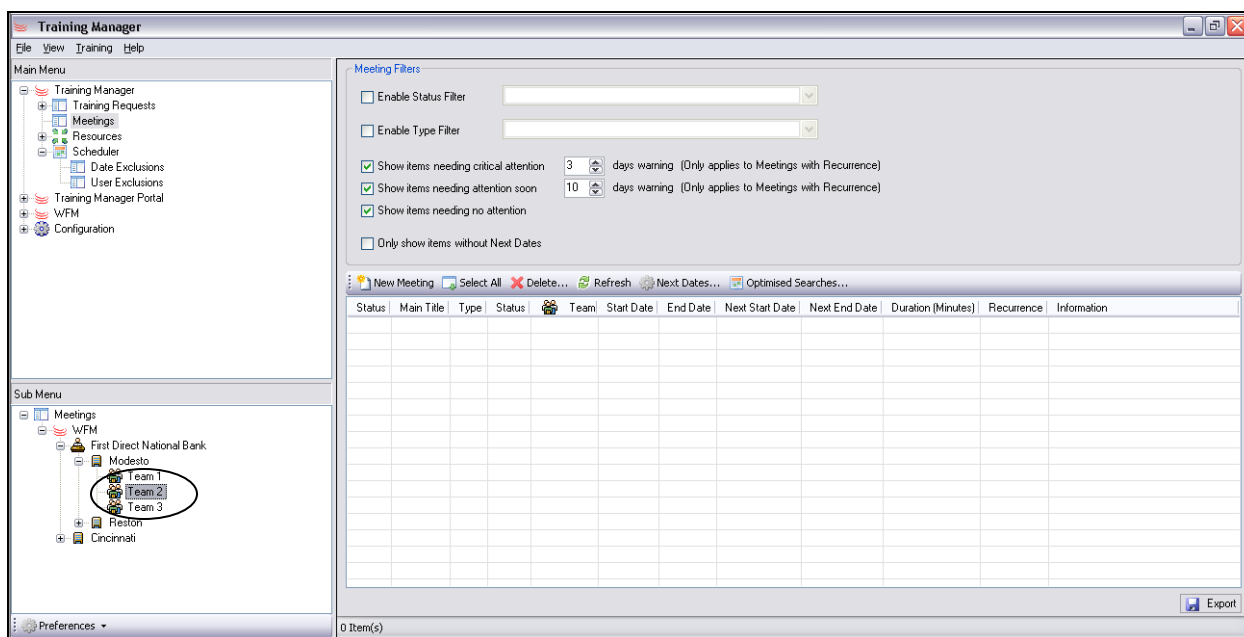


Expand the Genesys sites to reveal the associated teams in WFM.



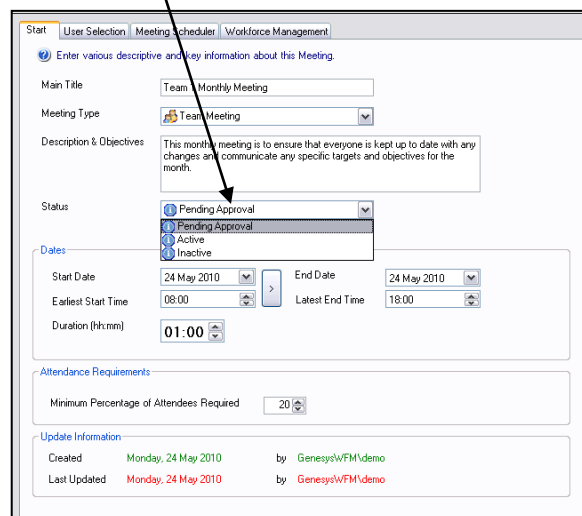
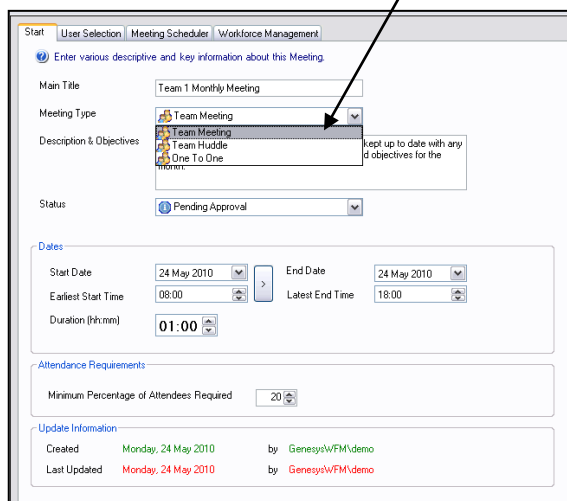
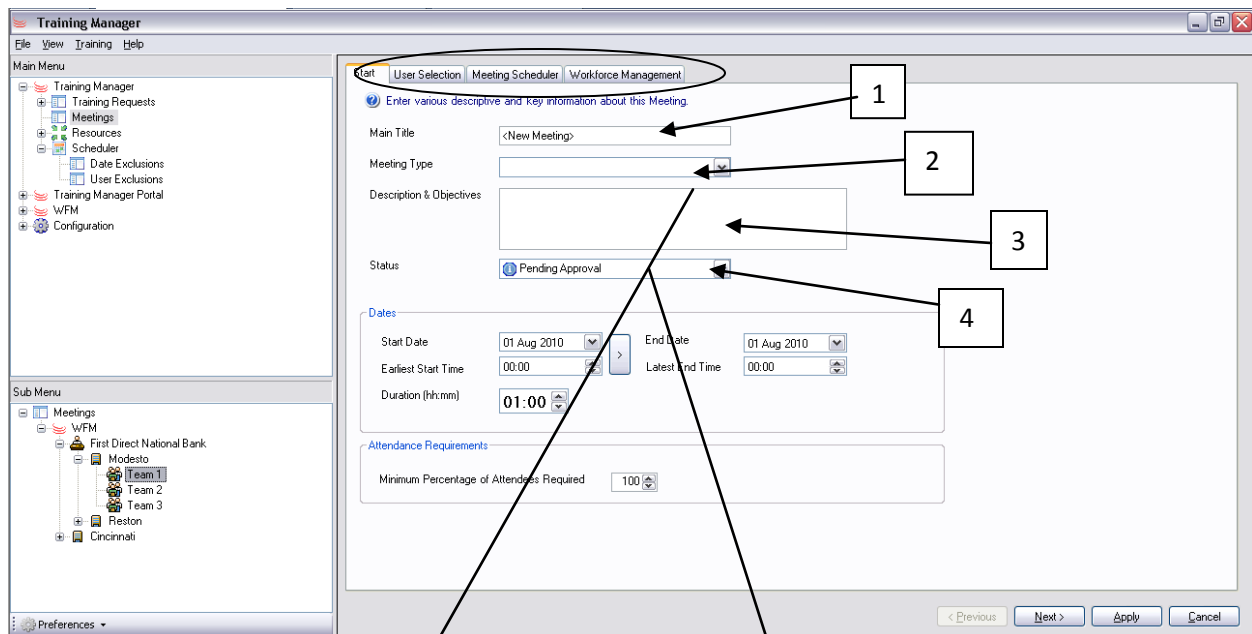
After clicking on one of the teams the meeting view will be presented in the Main Menu window (once meetings have been scheduled they will appear as a list in this window).


Click on 'New Meeting' to reveal the step by step meeting template (as per the example on the next page).

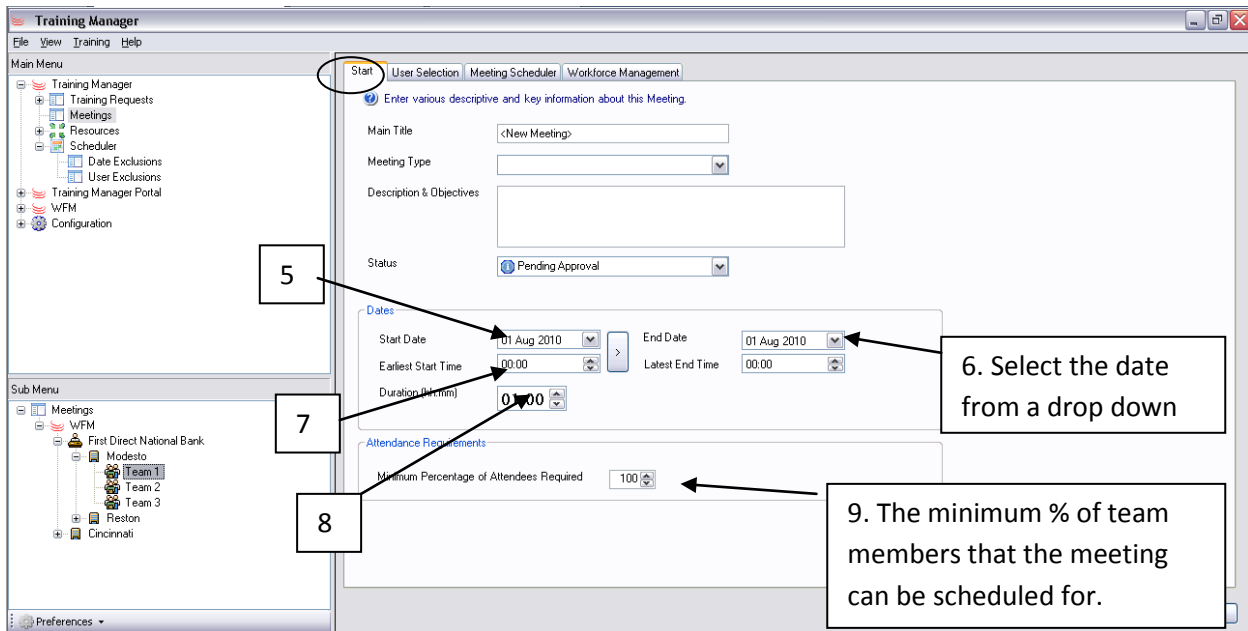


Clicking on 'New Meeting' presents the step by step meeting template with the tabs at the top of the page. In the start window complete the relevant sections to create the required meeting.

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 box. There are 3 options – Team Meeting, Team Huddle & One to One to select from (Team Meeting & Team Huddles would be selected for group meetings).
3. Description & Objectives – enter any relevant information about the meeting as this will also be visible in the web portal against the meeting.
4. Status – There are 3 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.
 - c. Inactive is used so that the meetings no longer appear as active.



5. Start Date – by default the meeting window will be the current date
6. End Date – the end date can be selected by using the drop down box or by clicking on  which then presents three options to select from. Click on any of the options and Genesys Training Manager will automatically populate the end date.
7. Enter the earliest start and latest end time that the meeting can happen.
8. Enter the meeting duration.
9. Enter the 'Minimum Percentage of Attendance Required'; this is the minimum percentage of team members that the meeting planner can schedule for the meeting to occur.



The screenshot shows the 'Start' tab of the Genesys Training Manager interface. The left sidebar contains a 'Main Menu' and a 'Sub Menu'. The 'Main Menu' includes 'Training Manager', 'Training Requests', 'Meetings', 'Resources', 'Scheduler', 'Date Exclusions', 'User Exclusions', 'Training Manager Portal', 'WFM', and 'Configuration'. The 'Sub Menu' includes 'Meetings', 'WFM', and a tree view under 'First Direct National Bank' with 'Modesto', 'Team 1', 'Team 2', 'Team 3', 'Reston', and 'Cincinnati'. The main content area has tabs for 'Start', 'User Selection', 'Meeting Scheduler', and 'Workforce Management'. The 'Start' tab is active, showing a form with the following fields:

- Main Title:** <New Meeting>
- Meeting Type:** (dropdown menu)
- Description & Objectives:** (text area)
- Status:** Pending Approval (dropdown menu)
- Dates:**
 - Start Date:** 01 Aug 2010 (dropdown menu)
 - End Date:** 01 Aug 2010 (dropdown menu)
 - Earliest Start Time:** 00:00 (time spinner)
 - Latest End Time:** 00:00 (time spinner)
- Duration (M:MM):** 0:00 (time spinner)
- Attendance Requirements:**
 - Minimum Percentage of Attendees Required:** 100 (percentage spinner)

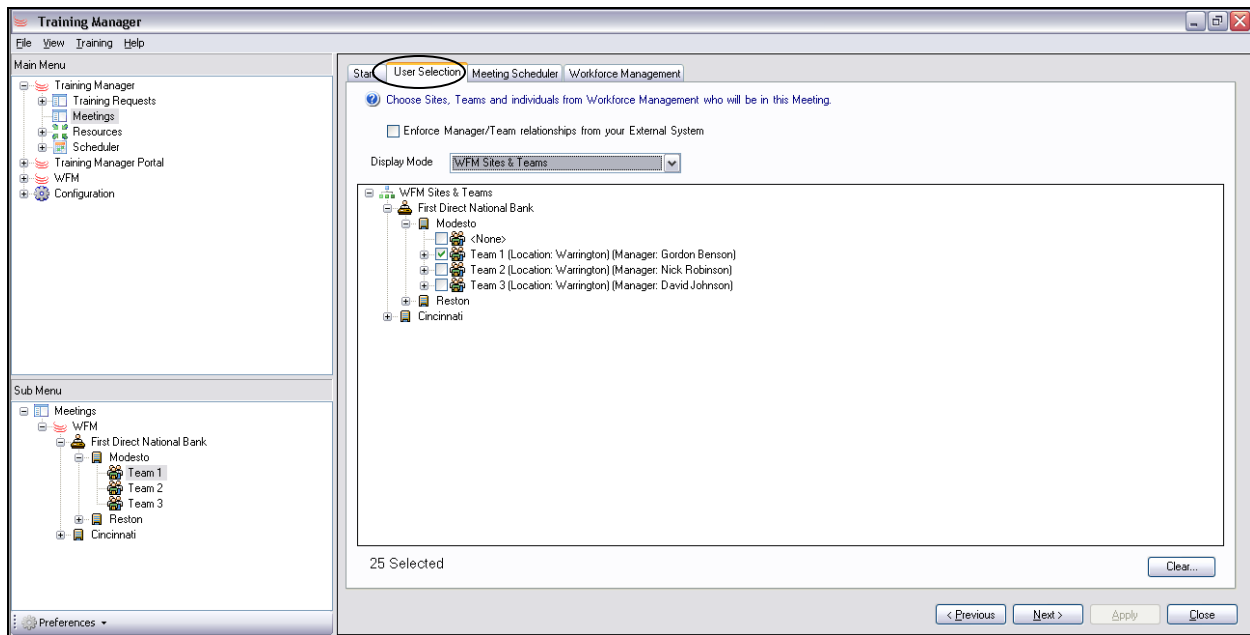
Numbered callouts point to the following fields:

- 5: Start Date dropdown menu
- 6: End Date dropdown menu
- 7: Earliest Start Time spinner
- 8: Duration spinner
- 9: Minimum Percentage of Attendees Required spinner

Once the 'Start' template has been completed, selected either 'Next' or the 'User Selection' tab.

In the 'User Selection' tab select the team that the meeting is being created for.

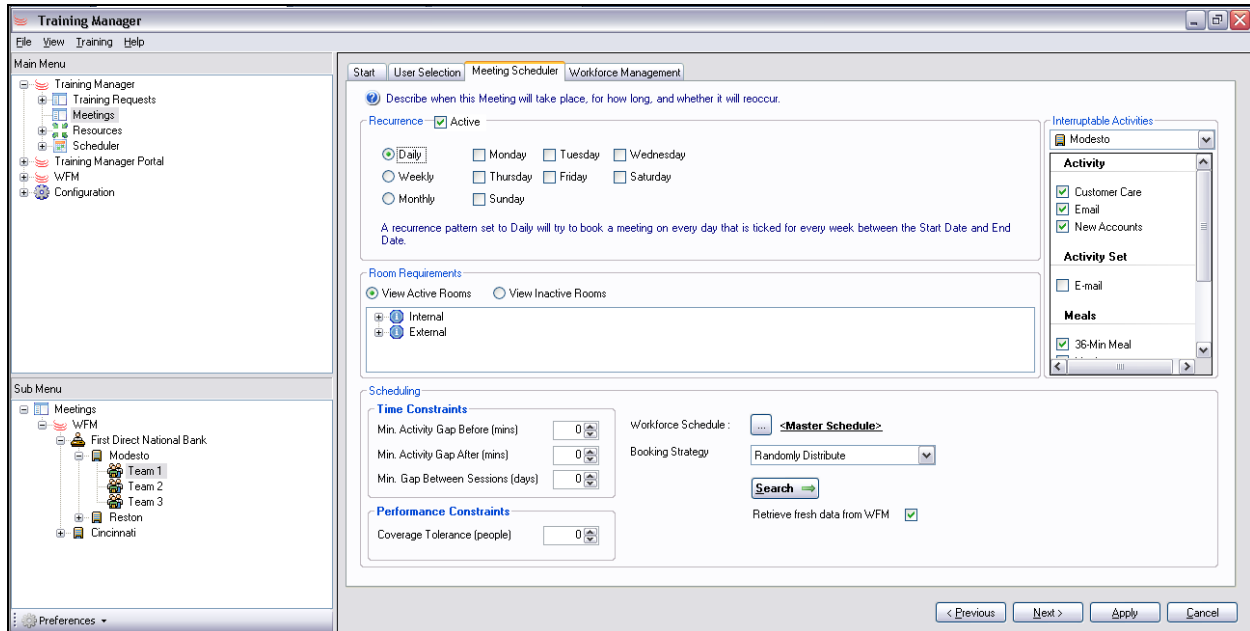
In this example Team 1 has been selected.



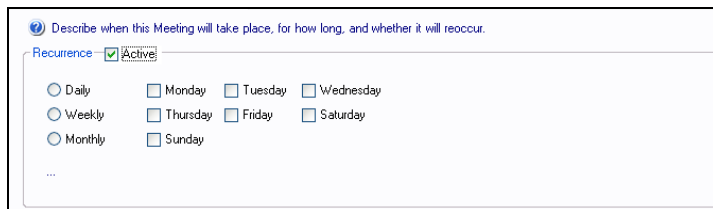
Once the relevant team has been selected, click on 'Next' or select the 'Meeting Scheduler' tab.

The meeting scheduler is where the elements of the meeting are defined.

1. Recurrence – selecting 'Recurrence' identifies to Genesys Training Manager that the meeting can be scheduled as recurring and can be 'rolled forward' to create future meetings.



After selecting 'Recurrence' the options become 'Active'.



There are three recurrence options available, Daily, Weekly & Monthly.

Daily – a recurrence pattern set to Daily will try to book a meeting on everyday that is ticked (Monday – Sunday) for every week between the Start and the End date.

Weekly – a recurrence pattern set to Weekly will try to book a meeting once a week on any of the days that are ticked between the Start and the End date.

Monthly – a recurrence pattern set to Monthly will try to book a meeting once a month on any of the days that are ticked between the Start and the End date.

After selecting the recurrence pattern, the option is then available to select a Room if this is required.

Within the 'Room Requirements' window is the option to select Rooms against the relevant locations. If Rooms are required select them by ticking the box at the left hand side.

Within the Scheduling window is the 'Time Constraints' options:

1. Min. Activity Gap Before (mins) – this specifies the minimum amount of time that the users has to have scheduled before they are scheduled to attend a meeting.
2. Min. Activity Gap After (mins) - this specifies the minimum amount of time that the users have to have scheduled after their meeting has been completed.
3. Min. Gap Between Sessions (days) – this is the minimum number of days that must be in between scheduled meeting.

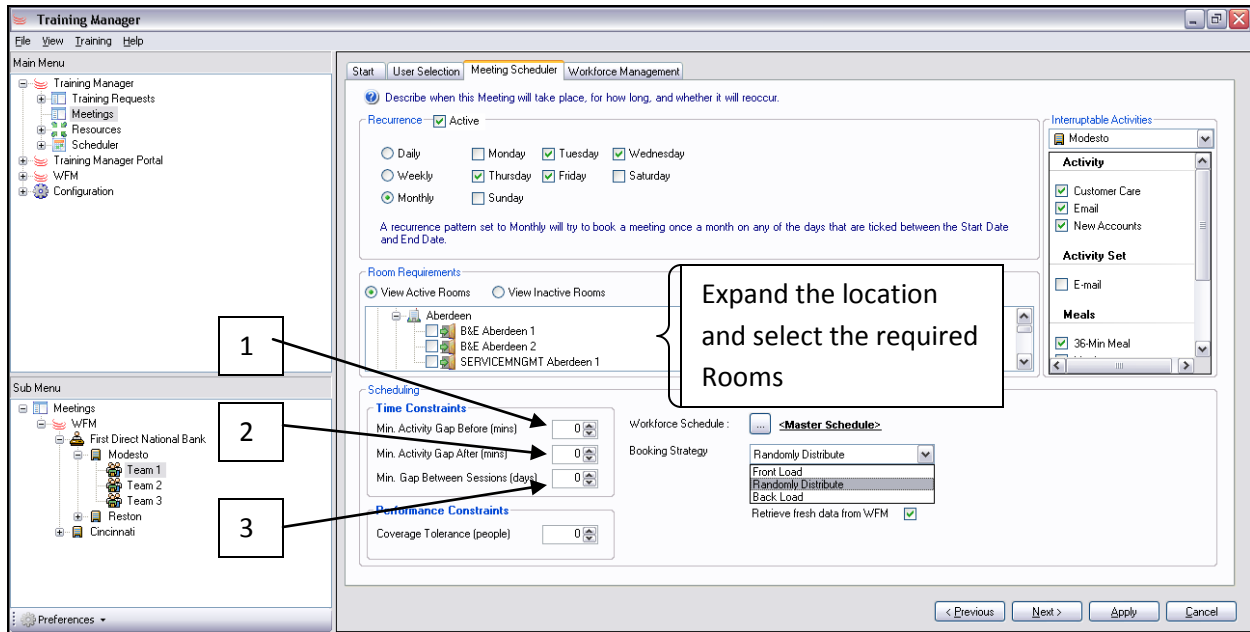
The 'Performance Constraints' window allows for a coverage tolerance to be entered.

The 'Workforce Schedule' (Master Schedule or Scenarios) is selected to schedule the meetings against to view the impact of the meetings in WFM

The Booking Strategy is selected with the option of Front Load, Randomly Distribute or Back Load available.

The 'Interruptible Activities' option is also available which if selected Genesys Training Manager will look at scheduling meetings over if required.

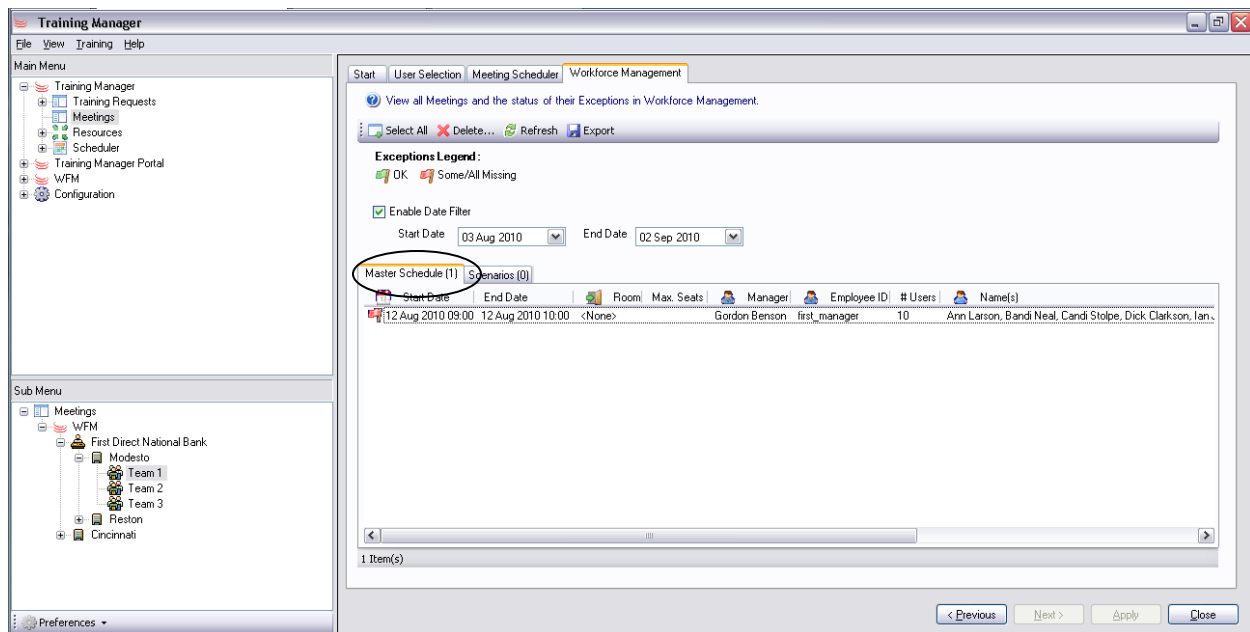
Select 'Search' to retrieve fresh data from GWFM.



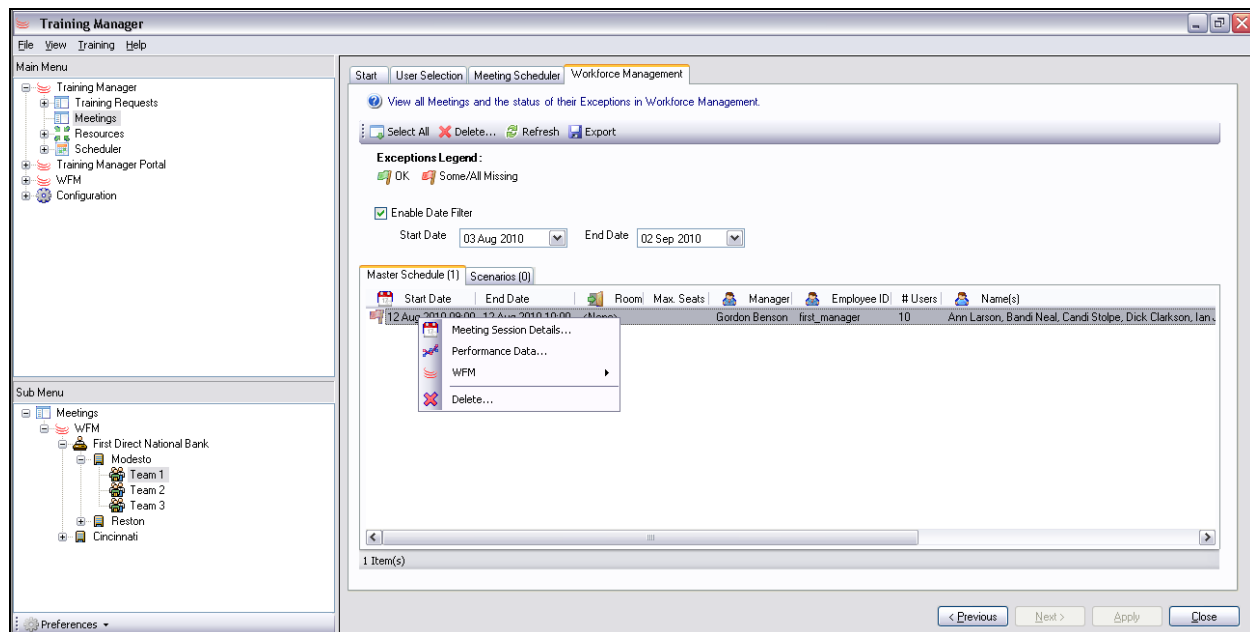
Select the 'Workforce Management' tab to reveal the suggested meetings.

The Master 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 to WFM as per the training requests.

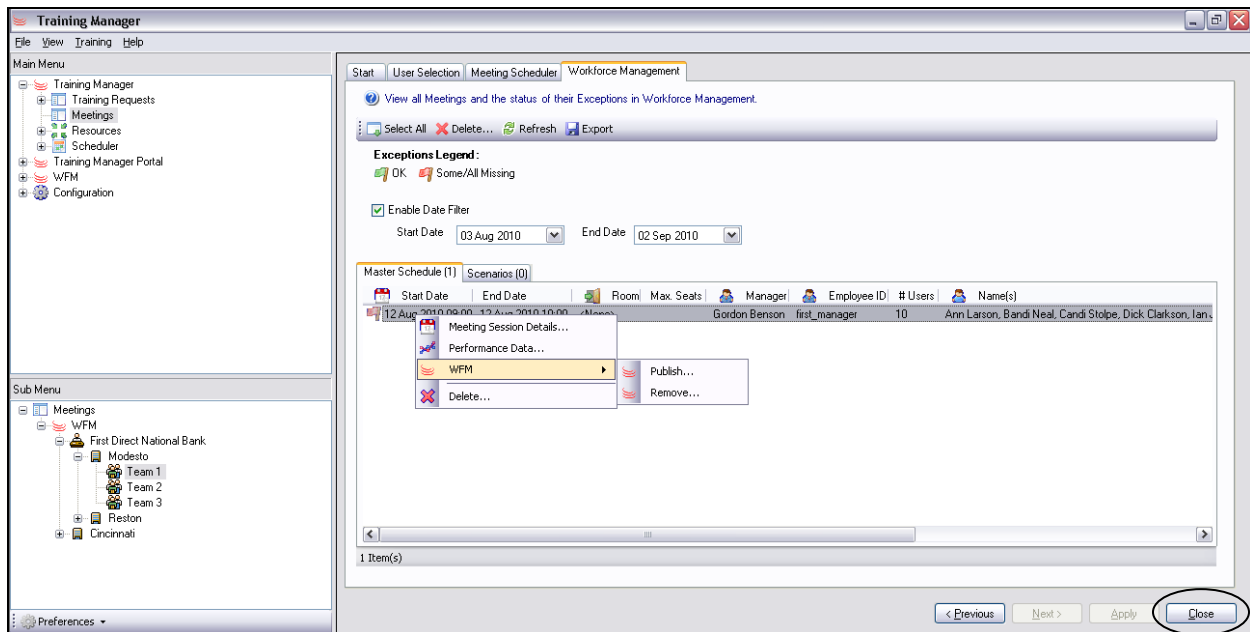


The options are also available to view the 'Meeting Session Detail...' and 'Performance Data...' as per creating training sessions.



In Version 2.5 the option to Commit has been changed to 'Publish...' and there is also the option to 'Remove...' the exceptions and keep the meeting sessions that have already been created rather than remove the exceptions by deleting the meeting or training requests.

Once the sessions have been committed, select 'Close' to close the meeting session template.

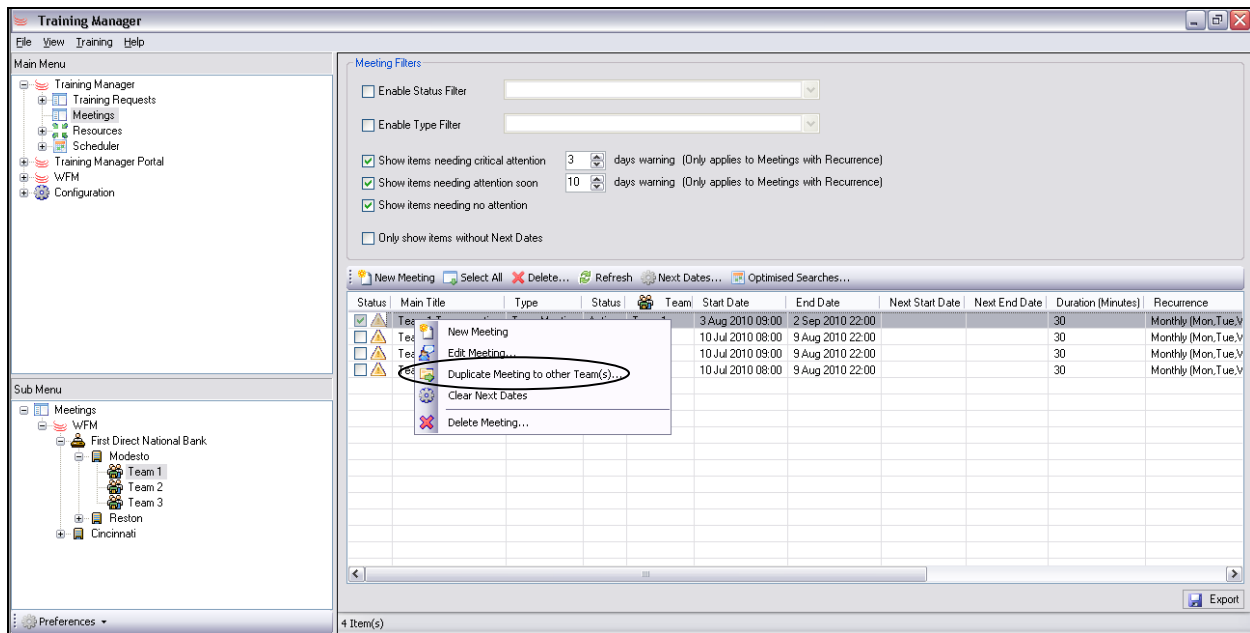


After closing the meeting request template the meeting session now appears in the Meetings window as per the example on the next page.

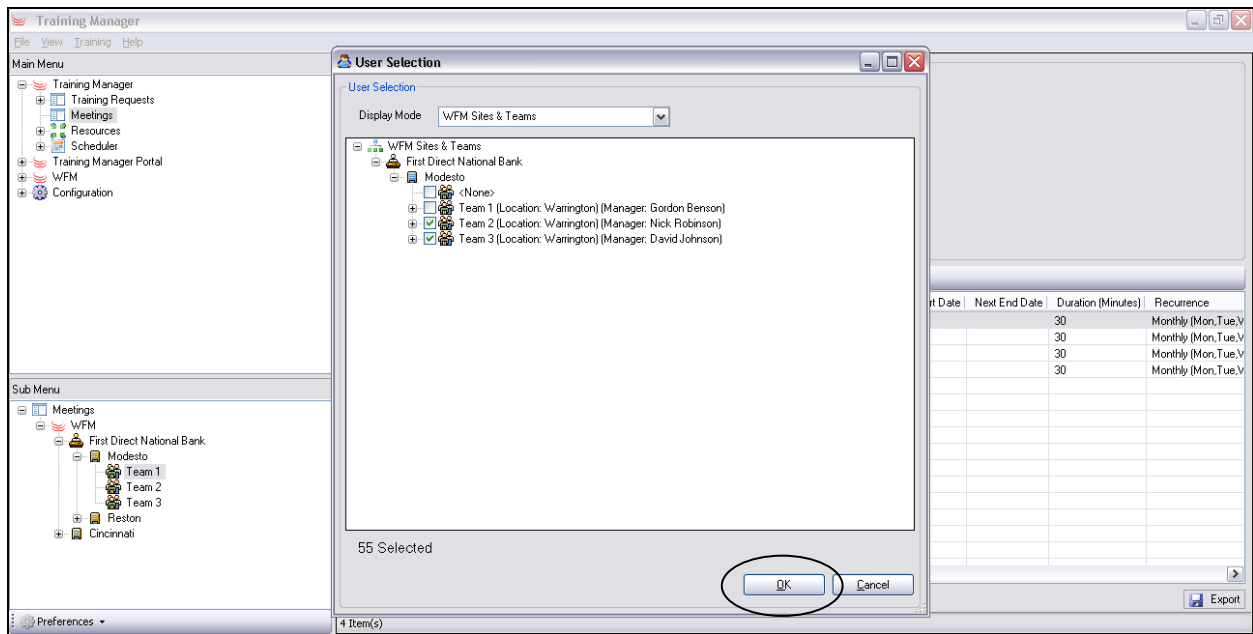
Copying a Scheduled Meeting to Other Teams

Once a meeting has been created it can then be copied across to other teams using the same format (this can be edited once created if required).

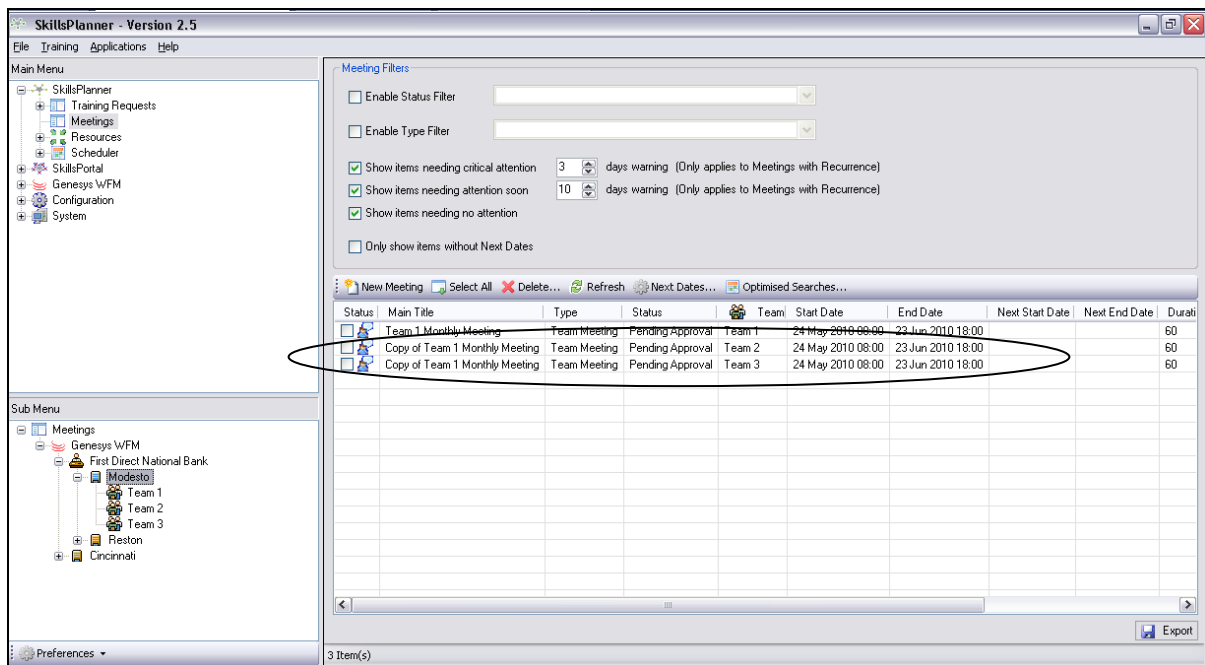
Right click on the meeting request and select 'Duplicate meeting to other Team(s)...' from the menu options presented.



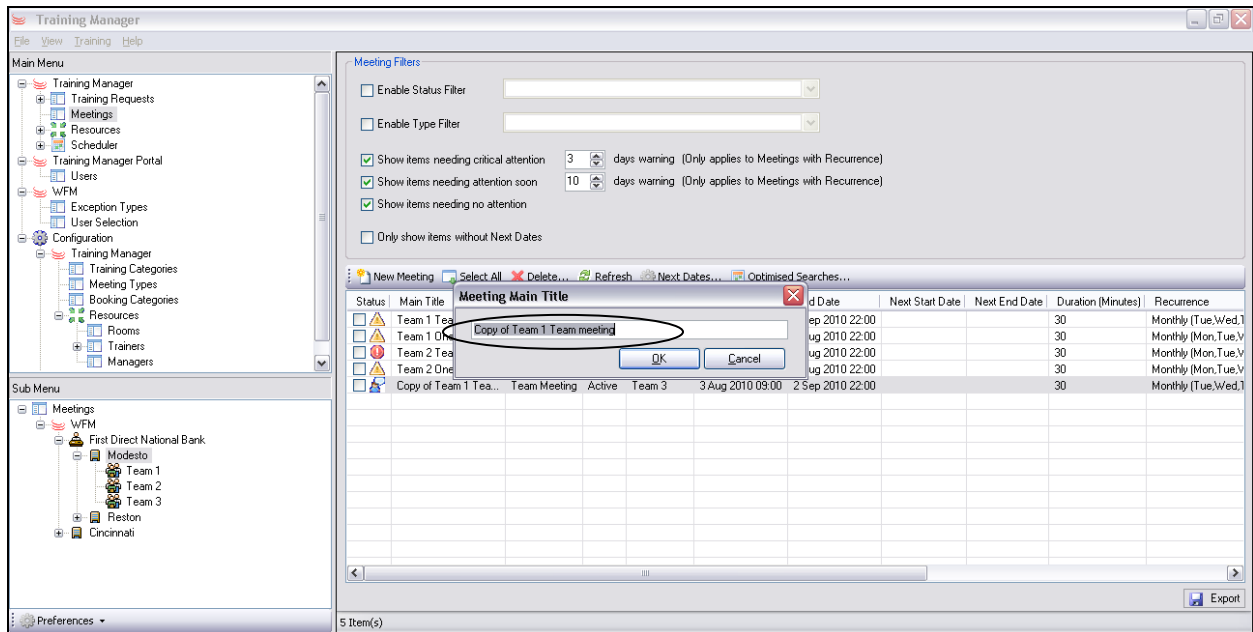
The Genesys WFM Sites & Teams structure is then presented to select from. After selection click on 'OK'



By default the main title shows as 'Copy of Team x Monthly Meeting'



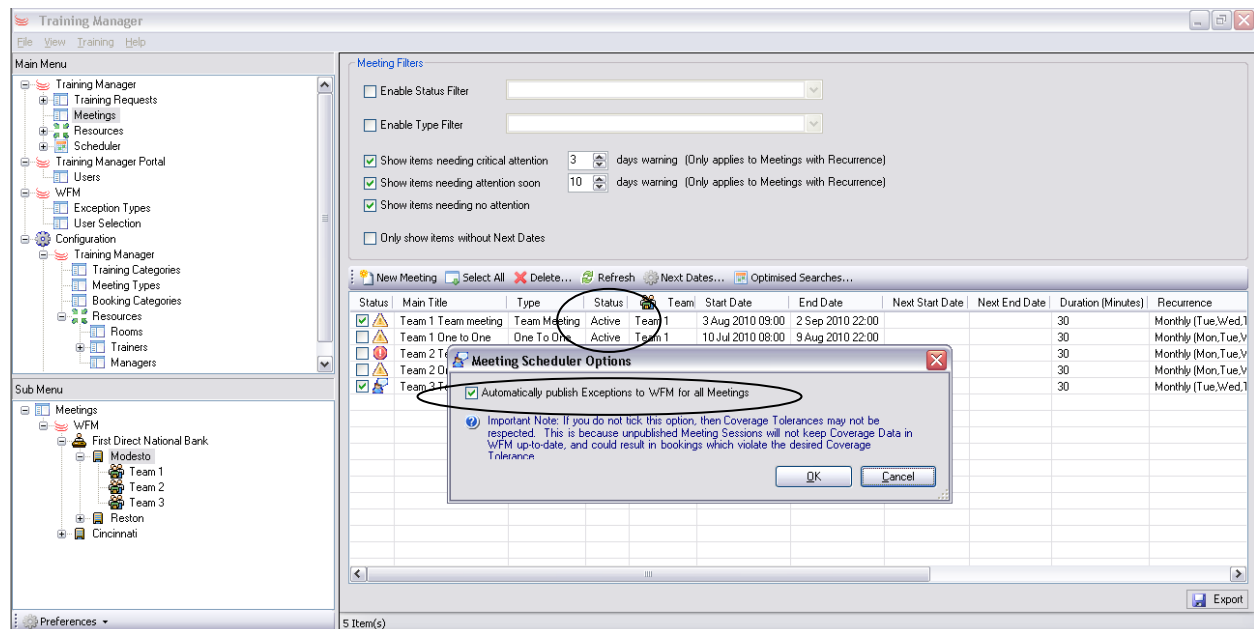
The main title can be changed by either double clicking on the main title team name or right clicking and select 'Edit Meeting...' from the menu options presented.



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 ticking the boxes at the left hand side and then select 'Optimized Searches...'

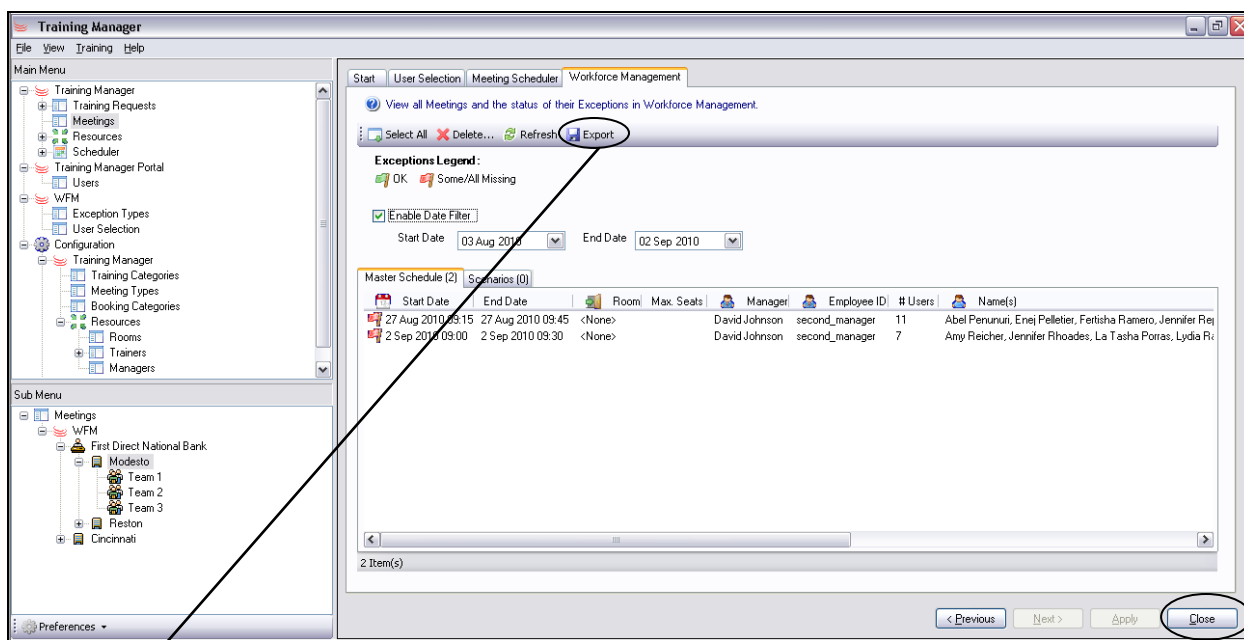
The 'Meeting Scheduler Options' message box is then presented as per the example below and by leaving the 'Automatically publish Exceptions to Genesys WFM for all Meetings' selected, the meetings will be scheduled using the exact criteria specified in the original meeting and the exceptions will be committed in GFWM.

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



Once the optimized search has been completed the schedules can be viewed by double clicking on the required meeting to reveal the meeting template and then select the 'Workforce Management' tab to view the scheduled sessions. As the flags are green the exceptions will have been committed into GWFM.

To exit out of the meeting template click on 'Close' at the bottom of the window.



There is an export option to view the training session detail.

Tooltip	Start Date	End Date	Room	Max. Seat	Manager	Employee ID	# Users	Name(s)	Exception
Exceptions are OK in Genesys WFM.	28/05/2010 12:30	28/05/2010 13:30	<None>		Gordon Bens first_manager		9	Ann Larson, Bandi Neal, Candi Stolpe, Eduardo Garcia, Gurutej Kaur, Joan Stuart, Kim Lewis, Nicole Stutts, Pele Lolani	Team Meeting
Exceptions are OK in Genesys WFM.	09/06/2010 12:00	09/06/2010 13:00	<None>		Gordon Bens first_manager		9	Amy Jay, Dick Clarkson, Ian Johnson, Kai Lemieux, Lynne Suzanne, Mary Gail, Nicole Stutts, Shane Carlson, Tianni Ayala	Team Meeting

Within 'Tooltip' is an indicator of whether the exceptions are OK in GWFM. If any exception had been altered in WFM the tooltip would change to identify this.

Group Scheduling of Recurring Meetings

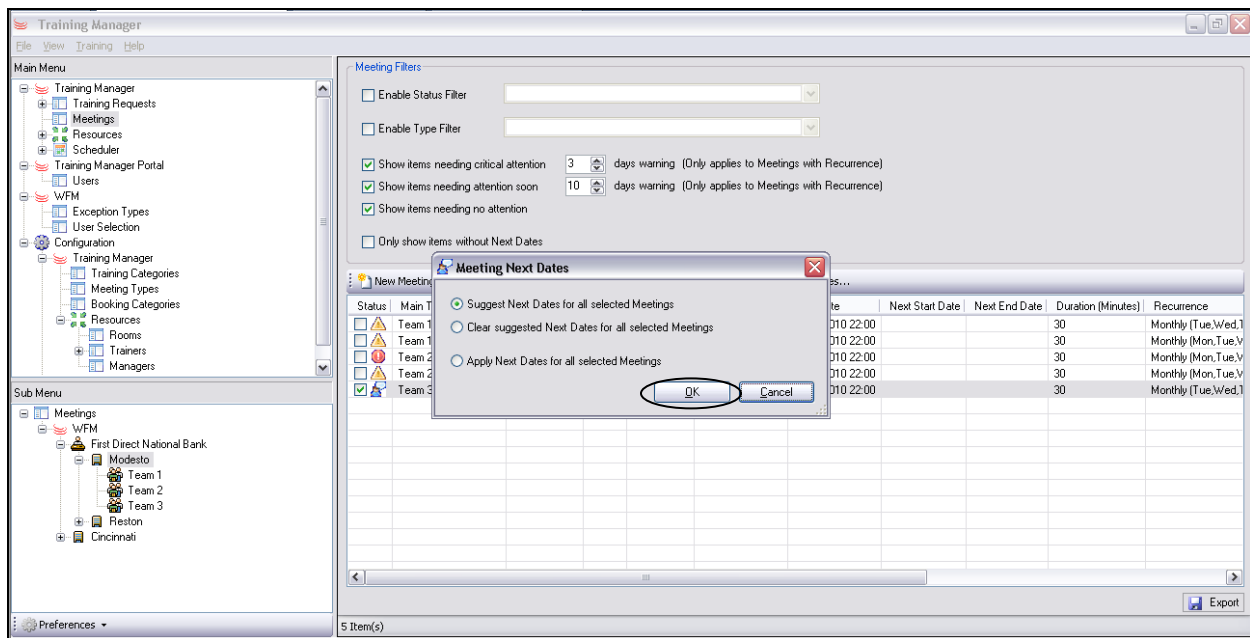
Once the team meetings have been created they can be 'rolled' forward in groups rather than having to create each meeting for the following month individually or manually.

Select the required meeting by ticking the boxes at the left hand side, then click on 'Next Dates'. The 'Meeting Next Dates' message box will be presented as per the example below.

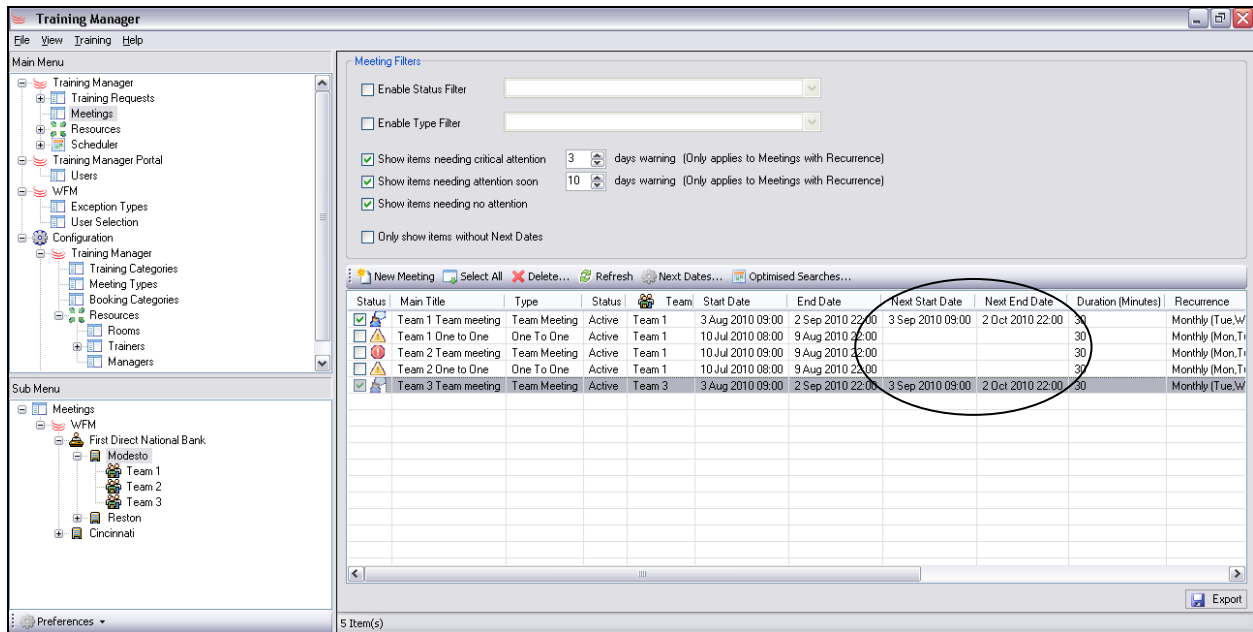
There are 3 options available:

- Suggest Next Dates for all selected meetings – by selecting this option, Genesys 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 1 month then Genesys Training Manager will suggest dates for the 1 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.

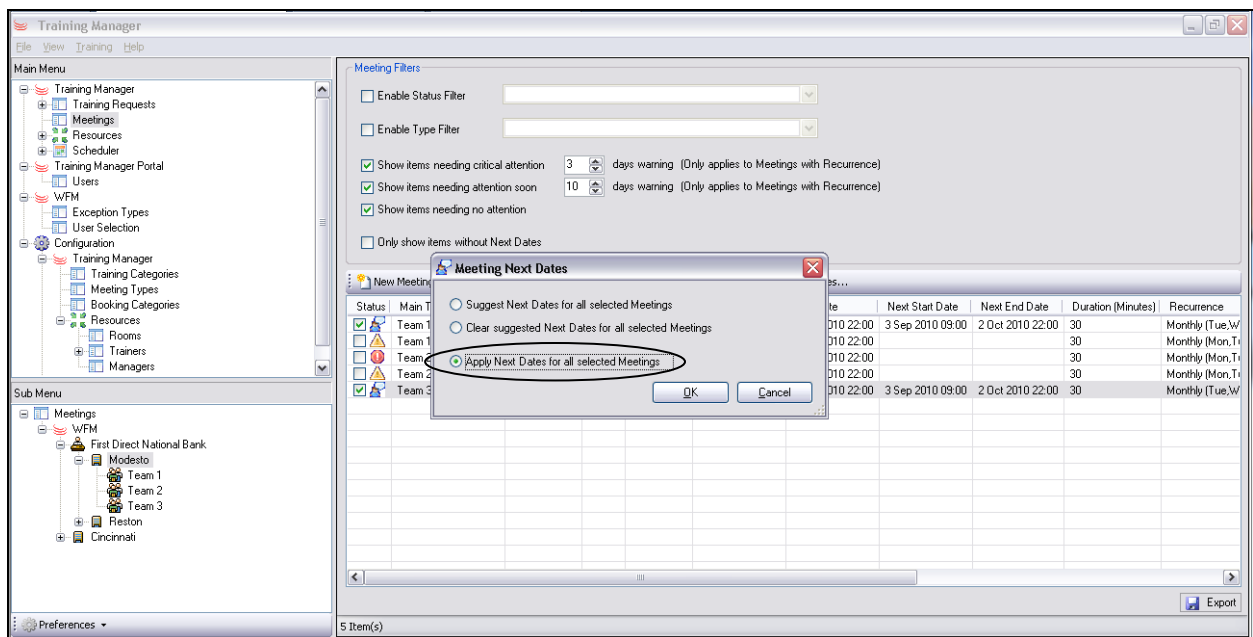
To create the next period meetings, select 'Suggest Next Dates for all selected Meetings' and then OK.



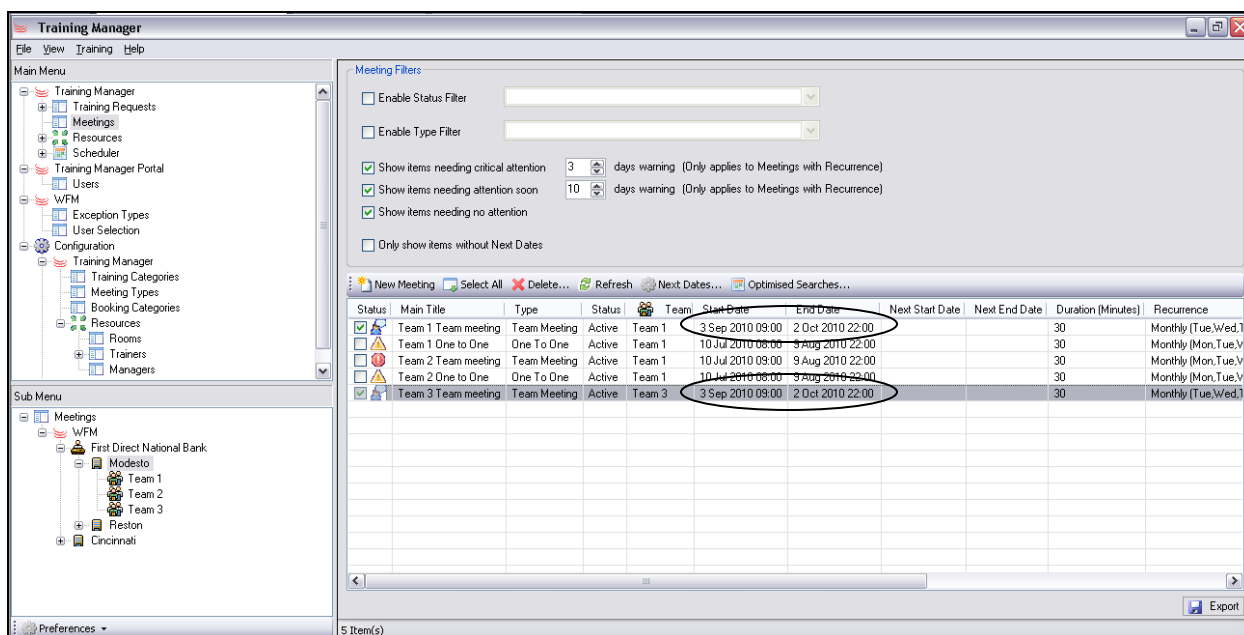
The new suggested dates will then appear under 'Next Start Date' & 'Next End Date'.



If the meetings dates suggested are correct select 'Next Date' again and the option 'Apply Next Dates for all selected Meetings'.

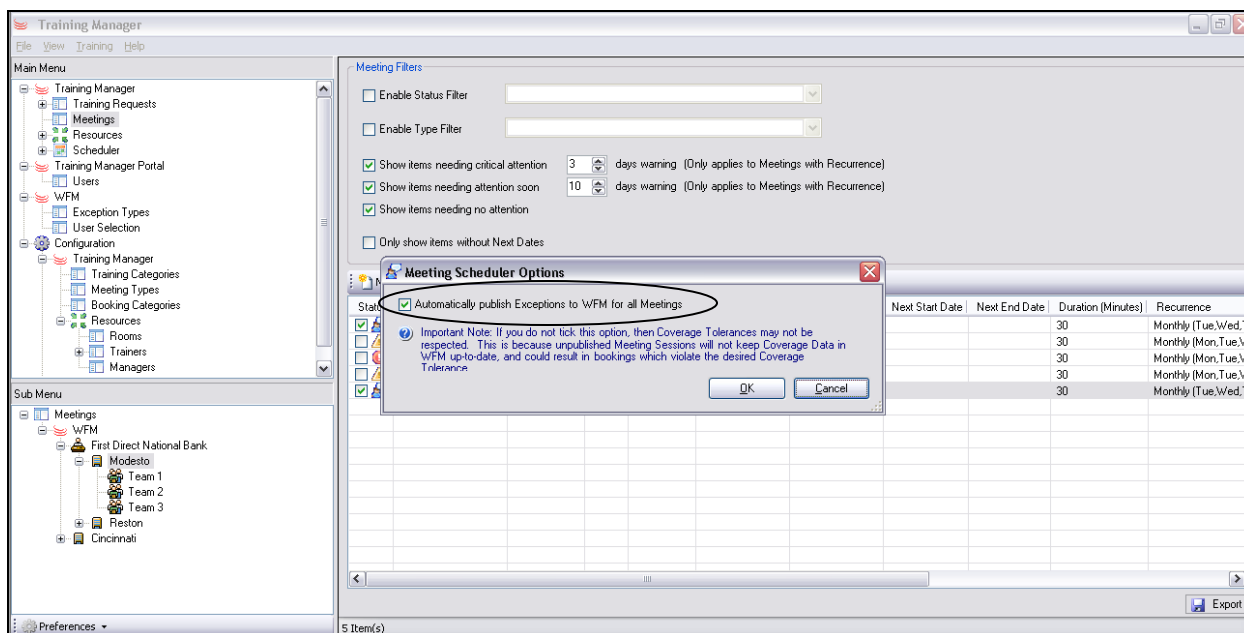


The new dates will now replace the previous dates under 'Start Date' & 'End Date'.



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

By leaving the 'Automatically publish Exceptions to Genesys WFM for all Meetings' this will publish the exceptions to WFM and by having the 'Status' as 'Active' the meeting sessions will appear in the manager and agents web portals.



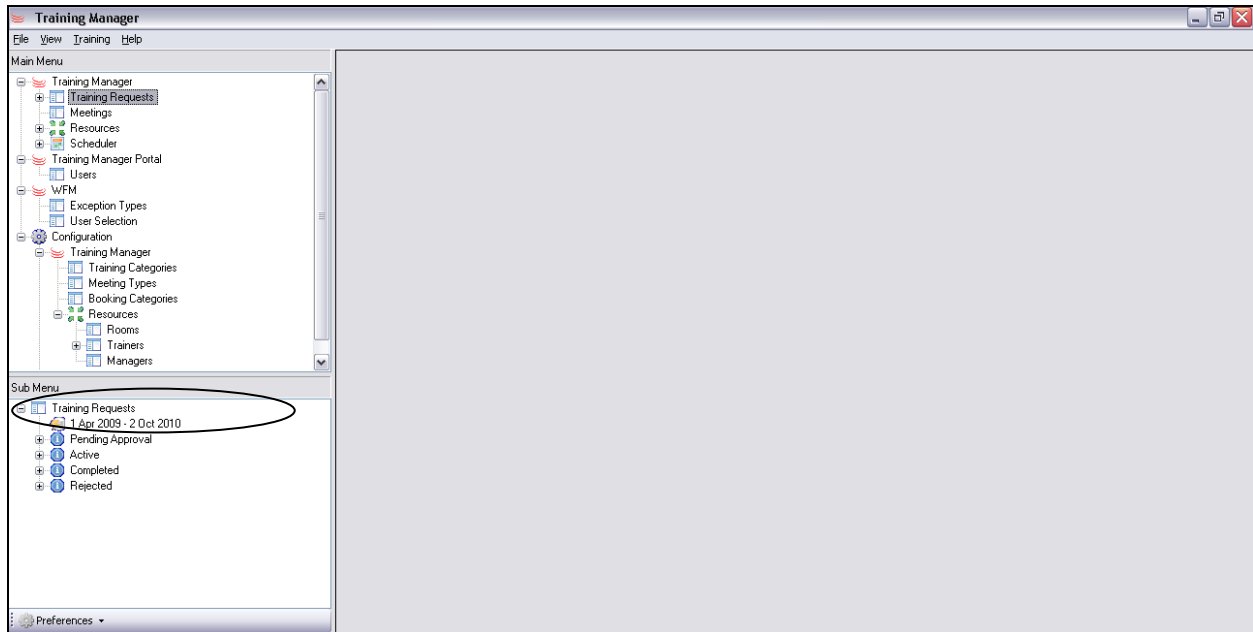
There are filter options available in the Meeting Window to reduce the number of meetings visible and to serve as reminders:

- 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, Team Huddle or One to One

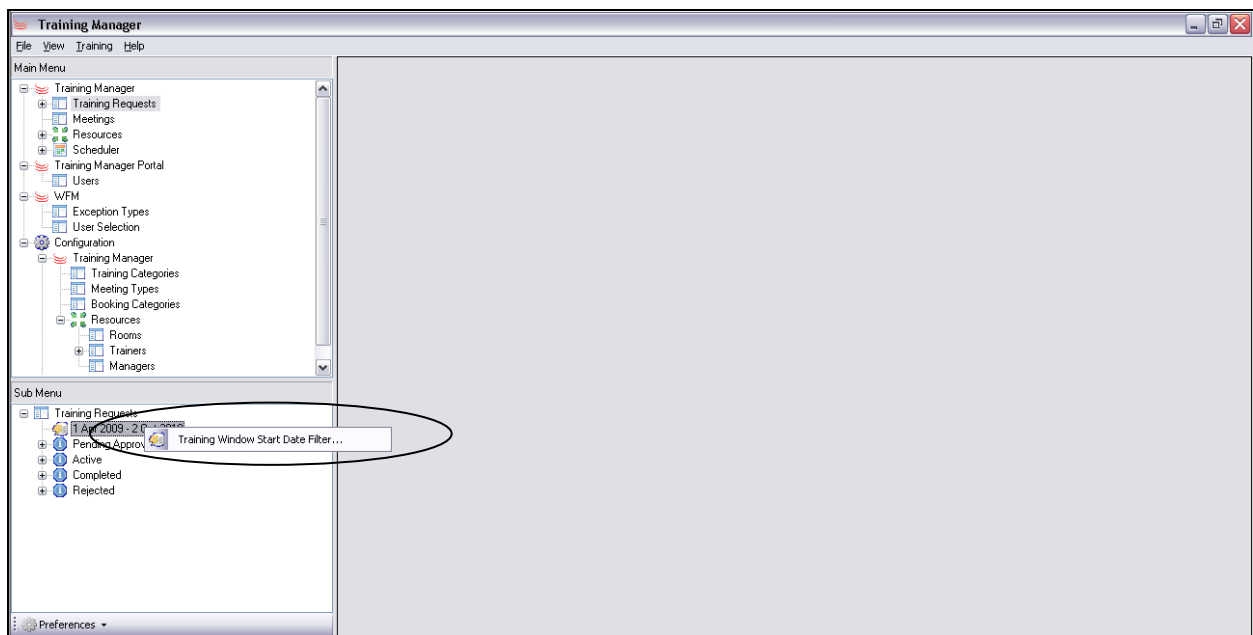
The days warning filters are used where the current scheduled meeting is within x days of the end date and the meeting is recurring and needs to be scheduled for the following month. This allows only those meeting that need attention to be visible.

Training Request Start Date Filter

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

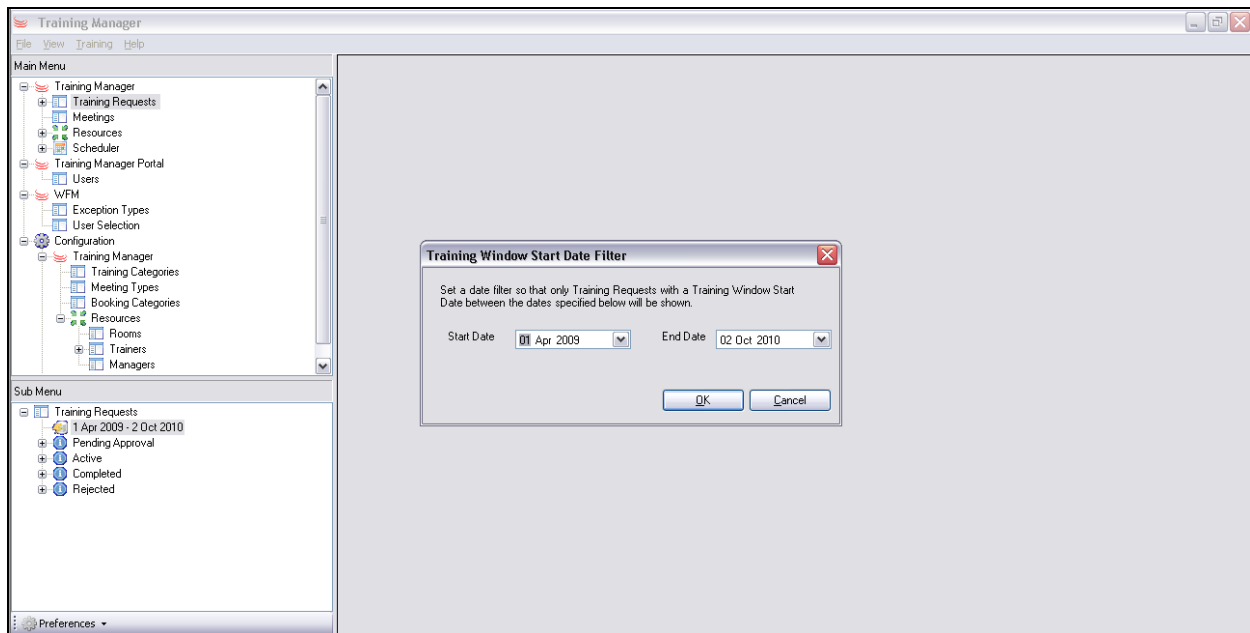


Right click on the date filter and the option to open the training window filter appears, as per the example below.



Enter the required start date range and then select OK.

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



Reports

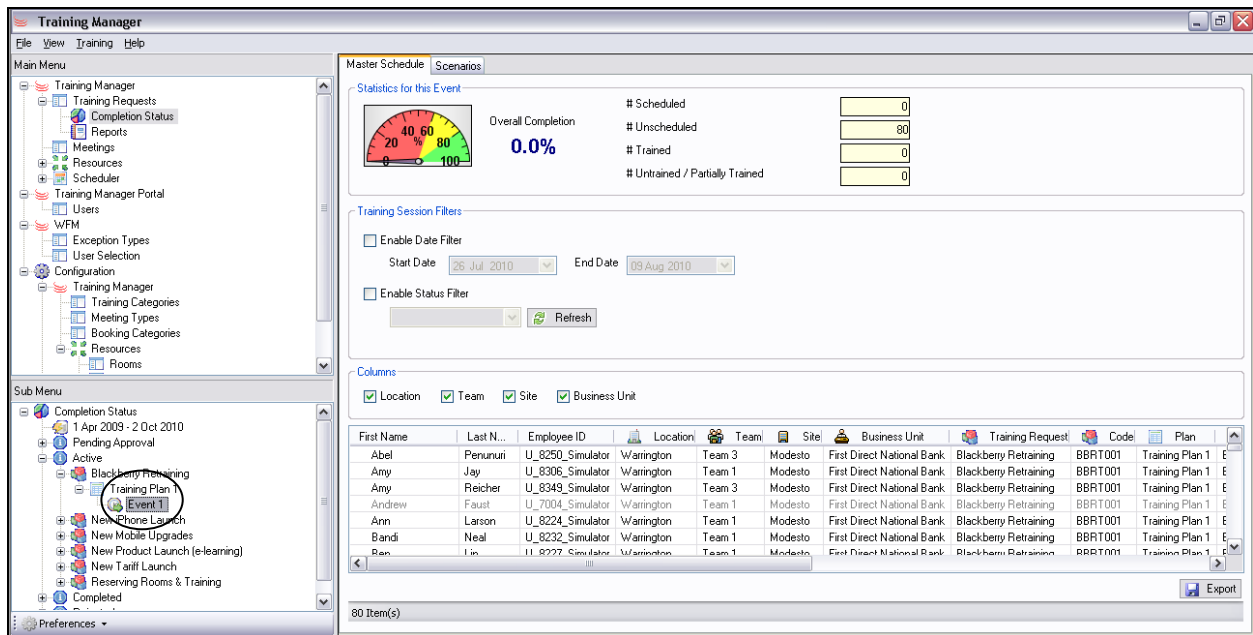
The following reports are available in Genesys Training Manager.

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' and by clicking on the training request name this will present a view similar to the example below.

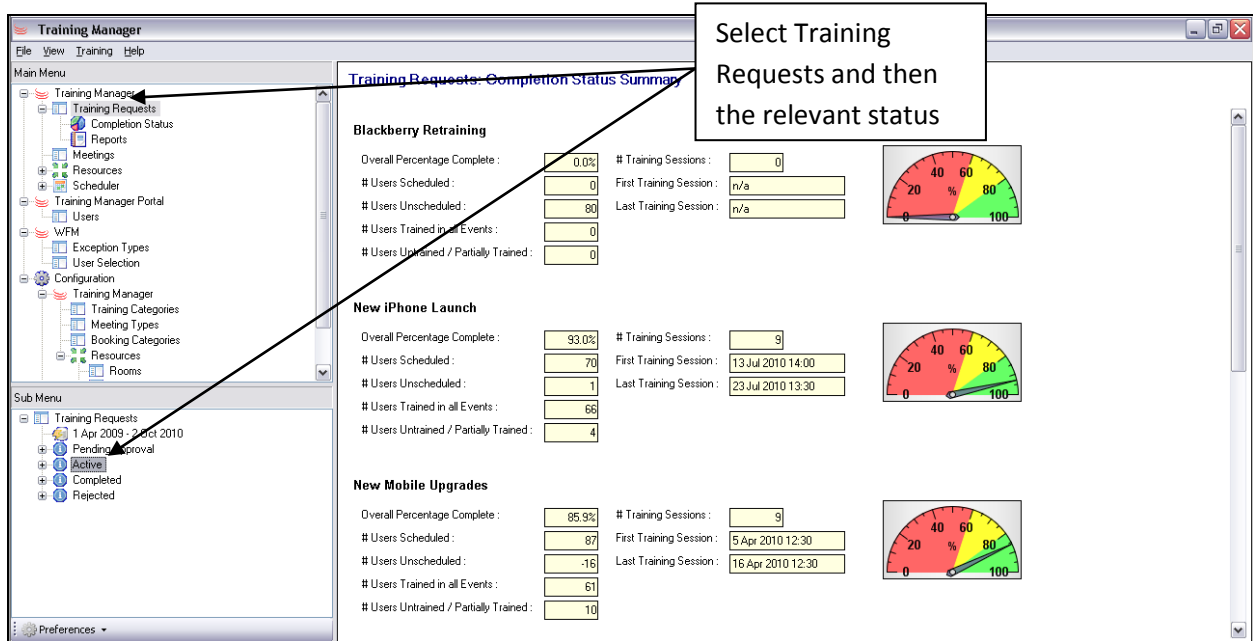
The gauge will give a visual representation of how near to completion the training is and the information is presented in a table format at the right hand side.



Training Summary by Status Report

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

By clicking on the actual status, for example, Active or Completed, this will show a summary for each of the training requests within that file similar to the example below.



Agent Detail Completion Report by Training Event

A completion status report for the training event is available which 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'. By selecting the last option this will present 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, 'Enable Date Filter'

Select Completion Status

Expand the status menu to find the relevant training request

Master Schedule | Scenarios

Statistics for this Event

Overall Completion: 0.0%

Scheduled: 0
Unscheduled: 80
Trained: 0
Untrained / Partially Trained: 0

Training Session Filters

Enable Date Filter
Start Date: 26 Jul 2010 End Date: 09 Aug 2010

Enable Status Filter
Refresh

Columns
Location Team Site Business Unit

First Name	Last Name	Employee ID	Location	Team	Site	Business Unit	Training Request	Code	Plan
Abel	Penunuri	U_8250_Simulator	Warrington	Team 3	Modesto	First Direct National Bank	Blackberry Retraining	BBRT001	Training Plan 1
Any	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Blackberry Retraining	BBRT001	Training Plan 1
Any	Reicher	U_8349_Simulator	Warrington	Team 3	Modesto	First Direct National Bank	Blackberry Retraining	BBRT001	Training Plan 1
Andrew	Faulst	U_7004_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Blackberry Retraining	BBRT001	Training Plan 1
Ann	Larson	U_8224_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Blackberry Retraining	BBRT001	Training Plan 1
Bandi	Neal	U_8232_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Blackberry Retraining	BBRT001	Training Plan 1
Ben	Lin	U_8277_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Blackberry Retraining	BBRT001	Training Plan 1

80 Item(s)

Export

Completion Status Report

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

Select the Main Menu 'Completion Status' option and the report template appears in the main window.

The option to filter by the following is then available:

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

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

The screenshot displays the 'Training Manager' application window. The 'Main Menu' on the left includes 'Training Manager', 'Training Requests', 'Completion Status' (selected), 'Reports', 'Meetings', 'Resources', 'Scheduler', 'Training Manager Portal', 'Users', 'WFM', 'Exception Types', 'User Selection', 'Configuration', 'Training Manager', 'Training Categories', 'Meeting Types', 'Booking Categories', 'Resources', and 'Rooms'. The 'Sub Menu' on the left shows 'Completion Status' with a date range of '1 Apr 2009 - 2 Oct 2010' and options for 'Pending Approval', 'Active', 'Completed', and 'Rejected'. The main window has two tabs: 'Master Schedule' and 'Scenarios'. The 'Master Schedule' tab is active, showing 'Training Request Filters' and 'Training Session Filters'. The 'Training Request Filters' section has checkboxes for 'Enable Status Filter' and 'Enable Code Filter'. The 'Training Session Filters' section has checkboxes for 'Enable Date Filter' and 'Enable Status Filter'. The 'Enable Date Filter' section shows 'Start Date' as '01 Apr 2010' and 'End Date' as '09 Aug 2010'. The 'Enable Status Filter' section shows 'Scheduled' as the selected status. Below the filters is a 'Columns' section with checkboxes for 'Location', 'Team', 'Site', and 'Business Unit'. The main data area is a table with columns: First Name, Last Name, Employee ID, Location, Team, Site, Business Unit, Training Request, Code, and Status. The table contains 97 items, with the first few rows visible. An 'Export' button is located at the bottom right of the table.

First Name	Last Name	Employee ID	Location	Team	Site	Business Unit	Training Request	Code	Status
Abel	Penunui	U_8250_Simulator	Warrington	Team 3	Modesto	First Direct National Bank	New Product Launch (e-learning)	NPL001	Training
Alex	Wang	U_8368_Simulator	Warrington	Team 6	Reston	First Direct National Bank	Andrea Test	AT001	Training
Alexandra	Washington	U_8361_Simulator	Warrington	Team 6	Reston	First Direct National Bank	Andrea Test	AT001	Training
Alison	Smith	U_8310_Simulator	Warrington	Team 5	Reston	First Direct National Bank	Andrea Test	AT001	Training
Amy	Reicher	U_8349_Simulator	Warrington	Team 3	Modesto	First Direct National Bank	New Product Launch (e-learning)	NPL001	Training
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New Product Launch (e-learning)	NPL001	Training
Angela	Thomas	U_8342_Simulator	Warrington	Team 5	Reston	First Direct National Bank	Andrea Test	AT001	Training
Bandi	Neal	U_8232_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New Product Launch (e-learning)	NPL001	Training

Individual Agent Training Summary Report

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

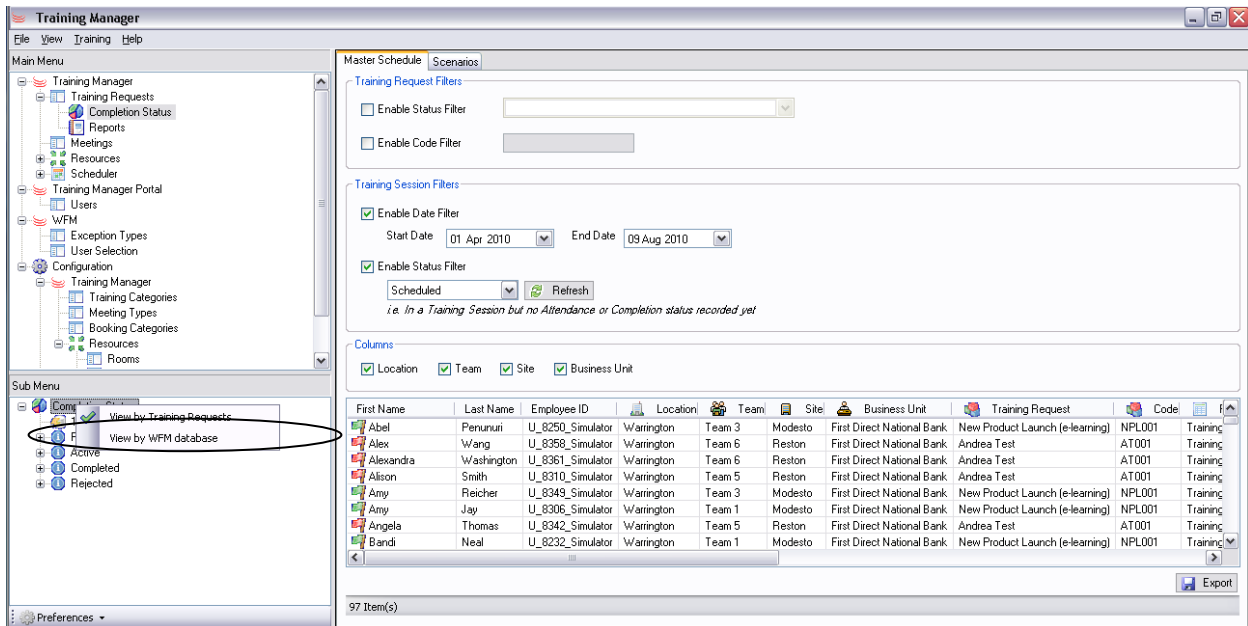
Expand 'Training Requests' in the 'Main Menu' window and select 'Completion Status'. A list of all of the training status will then be available, for example, Pending Approval.

The screenshot displays the Training Manager application interface. The 'Main Menu' on the left shows 'Training Requests' expanded, with 'Completion Status' selected. The 'Sub Menu' on the left shows 'Completion Status' expanded, with '1 Apr 2009 - 2 Oct 2010' selected. The 'Master Schedule' tab is active, showing a table of training sessions. The table has columns for First Name, Last Name, Employee ID, Location, Team, Site, Business Unit, Training Request, Code, and Plan. The table contains 6 items.

First Name	Last Name	Employee ID	Location	Team	Site	Business Unit	Training Request	Code	Plan
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Scenario Test	SCT001	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New Product Launch (e-learning)	NPL001	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New iPhone Launch	NIP001	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Blackberry Retraining	BBRT001	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New Mobile Upgrades	NMU002	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Test Training Request	TTR001	Training Plan 1

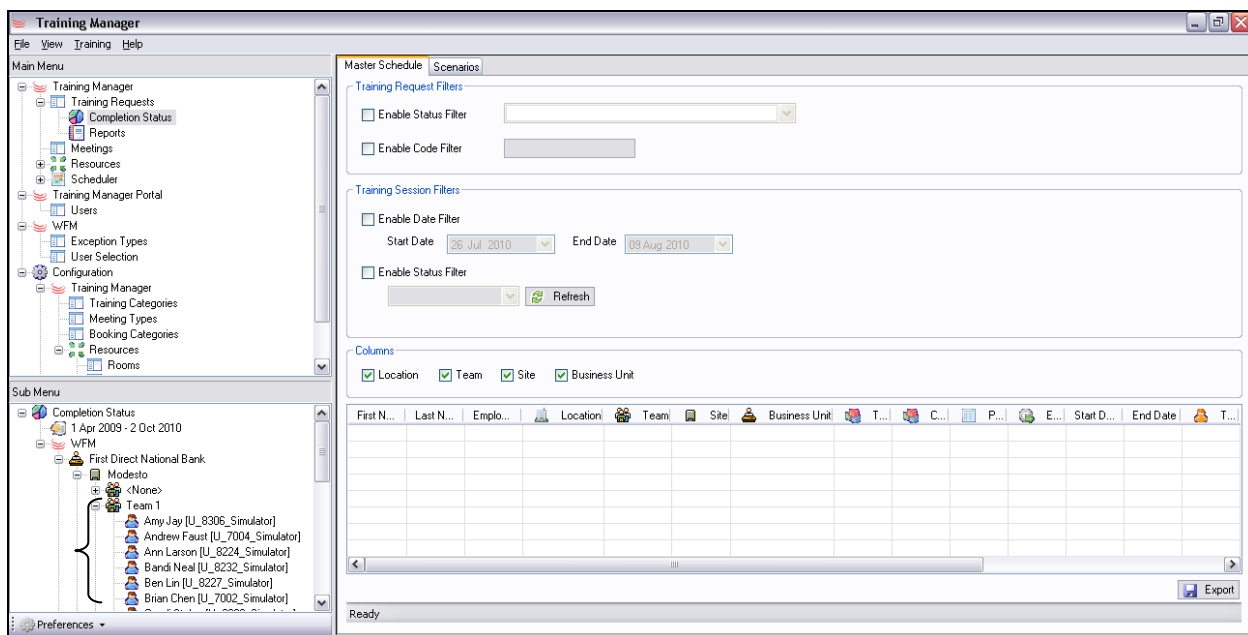
6 Item(s)

Select the status to report against and then right click to get the additional option of 'View by WFM database'.



This will then present a list in the 'Sub Menu' of the available sites or scheduling pots to select from.

Expand the tree view in the 'Sub Menu' down to the relevant team view to find the individual agent to report against.



Click on the individual agent to view all of their scheduled training activity together with the status and any comments.

Date and status filters are also available.

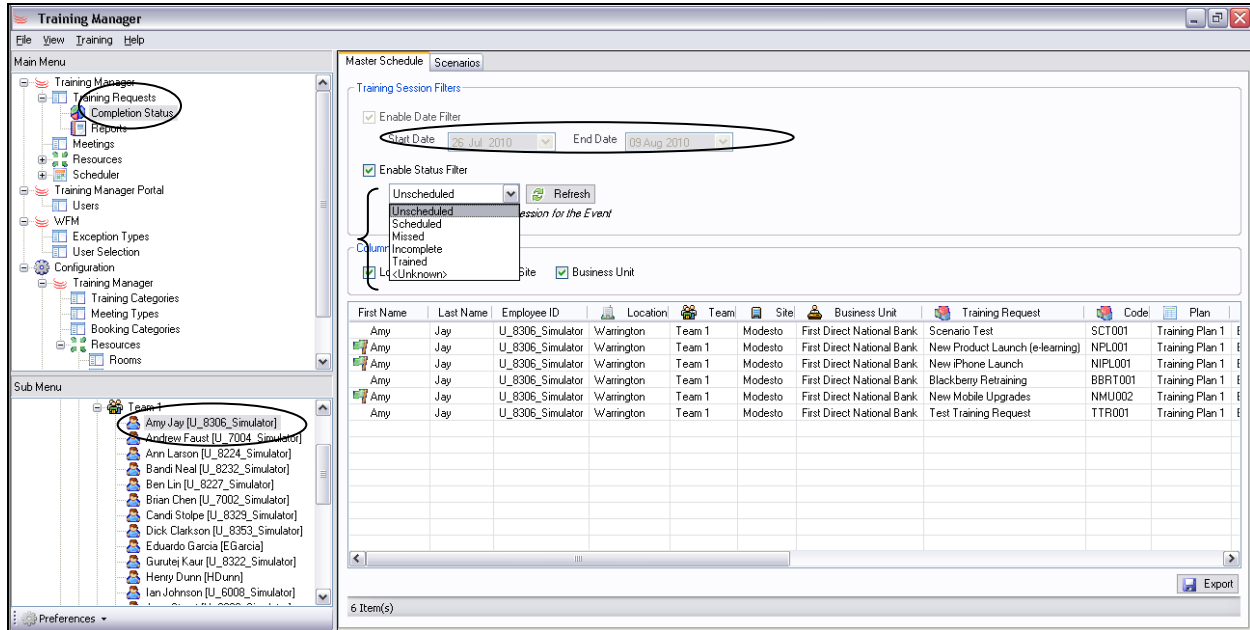
The screenshot displays the Training Manager application window. On the left, a navigation pane shows a tree structure with 'Training Manager' selected. The main area is divided into two tabs: 'Master Schedule' and 'Scenarios'. The 'Master Schedule' tab is active, showing a 'Training Session Filters' section with checkboxes for 'Enable Date Filter' and 'Enable Status Filter', and date pickers for 'Start Date' (26 Jul 2010) and 'End Date' (09 Aug 2010). Below the filters is a 'Columns' section with checkboxes for 'Location', 'Team', 'Site', and 'Business Unit'. The main data area is a table with columns: First Name, Last Name, Employee ID, Location, Team, Site, Business Unit, Training Request, Code, and Plan. A red oval highlights the first five columns of the table. The table contains six rows of data, all for 'Amy Jay' (Employee ID U_8306_Simulator). The 'Training Request' column lists various requests like 'Scenario Test', 'New Product Launch (e-learning)', 'New iPhone Launch', 'Blackberry Retraining', 'New Mobile Upgrades', and 'Test Training Request'. The 'Code' column shows codes like 'SCT001', 'NPL001', 'BBRT001', 'NMU002', and 'TTR001'. The 'Plan' column shows 'Training Plan 1'. At the bottom of the table, it says '6 Item(s)' and there is an 'Export' button.

First Name	Last Name	Employee ID	Location	Team	Site	Business Unit	Training Request	Code	Plan
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Scenario Test	SCT001	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New Product Launch (e-learning)	NPL001	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New iPhone Launch	NPL001	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Blackberry Retraining	BBRT001	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	New Mobile Upgrades	NMU002	Training Plan 1
Amy	Jay	U_8306_Simulator	Warrington	Team 1	Modesto	First Direct National Bank	Test Training Request	TTR001	Training Plan 1

Exportable Training Overview Report

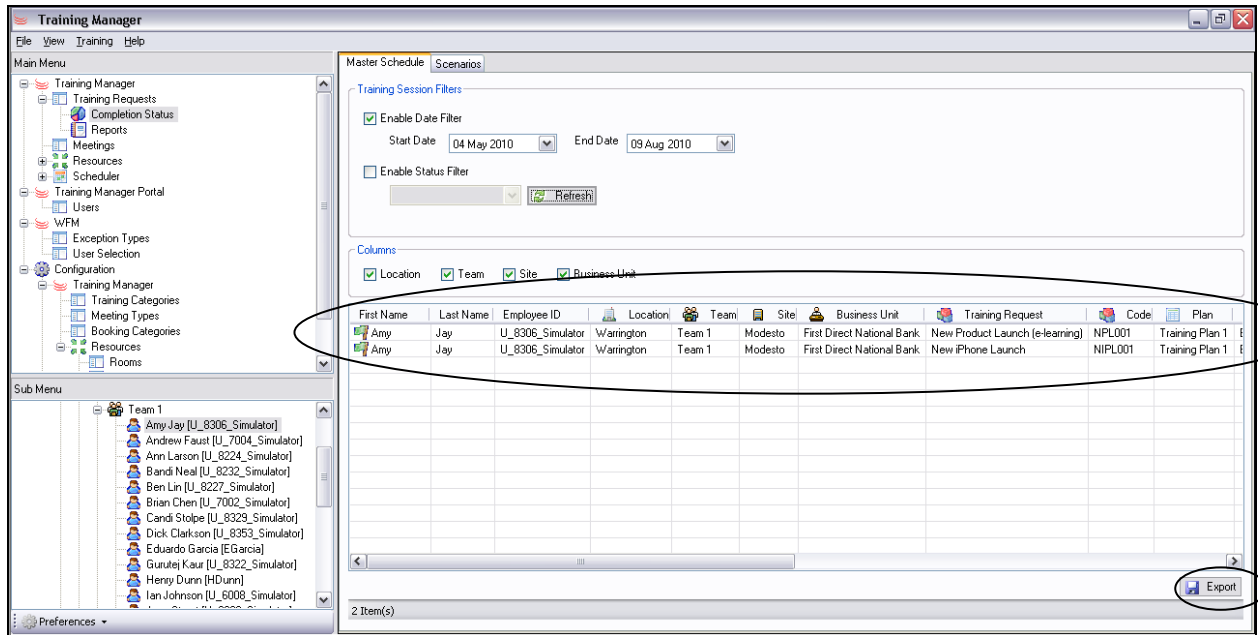
This report is available by expanding 'Training Requests' in the 'Main Menu' and select 'Reports'.

Select the required report from the pull down 'Report' box. Change the date range in 'Start Date' and 'End Date' if required and then click on 'Refresh'.



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

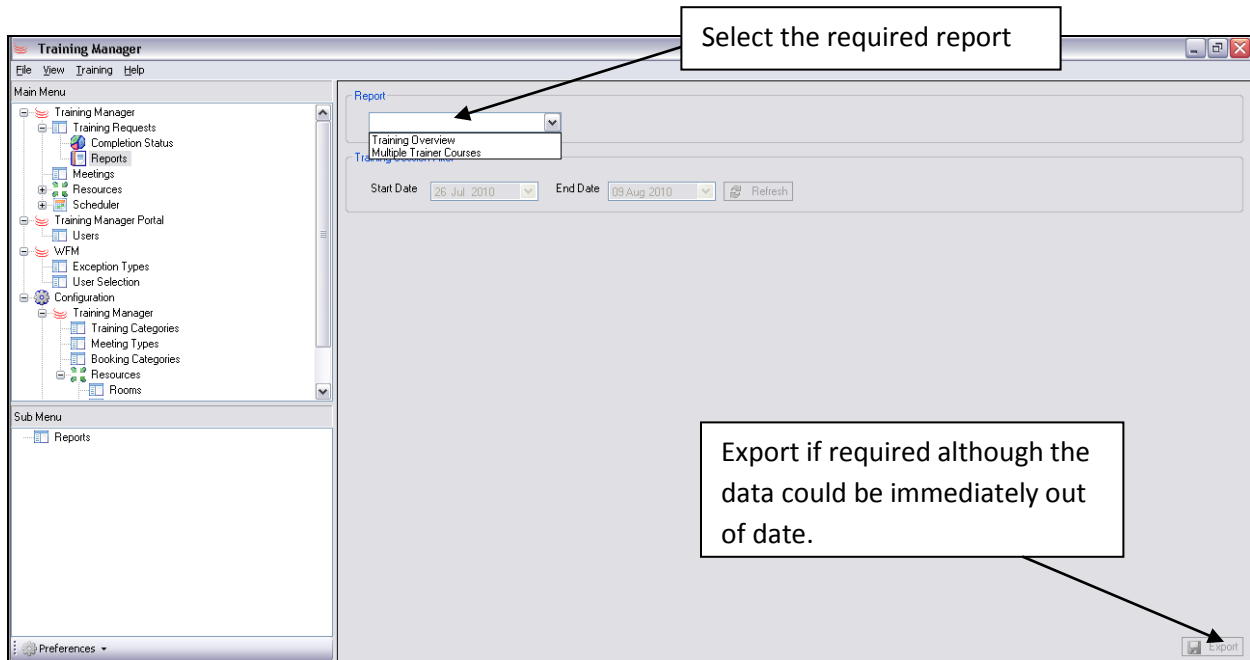
This information can also be exported by selecting the 'Export' button.



Multiple Trainer Courses Report

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

This information can be exported if required.



Useful Tips

When scheduling for a full days 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, have a schedule or are not on holiday 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) re the 11 hour 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, first export it and save as a csv file. Open excel and then open the csv document as 'delimiter' this will then transfer the file into Excel.
One of the Rooms previously used, is now not available.	Select the Room from within the Resources main menu option and deactivate the Room to make sure it is not used in the future.