



Genesys Training Manager 8.0

Web Portal Manager 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 Web Portal Manager Guide*. This guide is designed to explain the application in user friendly terms and walk through how to navigate the system.

Access has been provided for managers to view what training activity their agents have been scheduled for, together with the trainer, room and the reason for the training.

The training roadmap, with any scheduled training activity is also visible.

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.

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-on-ones, automatically in Genesys WorkForce Management (WFM). The training scheduling process can include rooms and trainers or any combination of agent, room, and training.

For team meetings and one-on-ones, this automatically includes the manager. A browser-based Web portal is included as part of the application, allowing visibility of the scheduled training and meeting activity, together with any other details available. For example, it describes the reason for the training, the room, the identity of the trainer, and

any pre-training work of the Manager, as well as whom has attended. This automatically updates Training Manager, 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 Web Portal Manager

The Manager

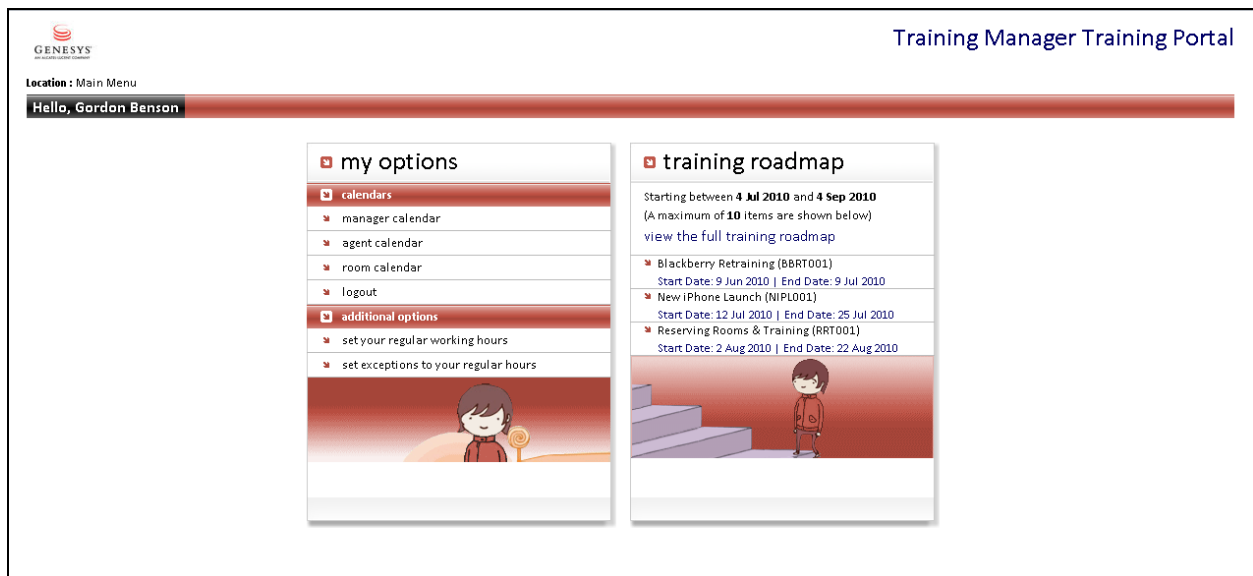
When the manager logs on to the system they are presented with a view similar to the example below.

The manager has access to:

- Manager calendar
- Agent calendar
- Room calendar
- Logout
- Set your regular working hours
- Set exceptions to your regular hours

The screen is separated into two sections, 'my options' in the left hand window and the 'training roadmap' detail in the right hand window.

Training information will only be visible in the portal if training sessions have already been created in Training Manager.




My Options

Manager Calendar

Selecting 'manager calendar' from the home page will present a standard view of any scheduled activity. This will include any team meetings, one to ones or any other activity that has been entered through the 'Planner View'.

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



Training Manager Training Portal

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

Hello, Gordon Benson

manager calendar

⚠️ **Required fields** are all shaded in this colour

Key

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

i **completed**
Training no longer requiring action

i **Other**
Non-Training Activity

Standard View
Planner View

Search

Start Date
End Date
Sort By

Gordon Benson

Friday, 7 May 2010

i 12:45 - 13:15 Team1 One to One - One To One with Gordon Benson

i 13:45 - 14:15 Team1 One to One - One To One with Gordon Benson

Thursday, 13 May 2010

i 15:00 - 15:30 Team1 One to One - One To One with Gordon Benson

Friday, 14 May 2010

i 09:30 - 10:00 Team1 One to One - One To One with Gordon Benson

i 13:45 - 14:15 Team1 One to One - One To One with Gordon Benson

By clicking on one of the schedule bars this will reveal any other detail associated to that scheduled item.

In the example below the scheduled One to One is with agent Linda Sweeney.

Training Manager Training Portal

Location: Main Menu > Manager Calendar

Hello, Gordon Benson

manager calendar

Required fields are all shaded in this colour

Key

- scheduled
- Training or meeting partially or fully scheduled
- completed
- Training no longer requiring action
- Other
- Non-Training Activity

Standard View | **Planner View**

Search Start Date: 07 May 2010 End Date: 18 August 2010 Sort By: Manager Go

Gordon Benson

Friday, 7 May 2010

- 12:45 - 13:15 Team1 One to One - One To One with Gordon Benson
- Room: <None>
- Employee ID** First Name Last Name
- U_8332_Simulator Linda Sweeney
- 13:45 - 14:15 Team1 One to One - One To One with Gordon Benson

Thursday, 13 May 2010

- 15:00 - 15:30 Team1 One to One - One To One with Gordon Benson

Selecting the 'Planner View' gives more of a calendar view of any scheduled activity, as per the example below. The planner view can be viewed in Day, Week or Month as required.

Training Manager Training Portal

Location: Main Menu > Manager Calendar

Hello, Gordon Benson

manager calendar

Required fields are all shaded in this colour

Key

- Uncategorised
- Holiday
- Lunch Break
- Management Meeting
- Meeting
- Preparation Time
- Training Session

Standard View | **Planner View**

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

< > today July 2010 Day Week Month

Gordon Benson

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	01 Jul	2	3	4
Team 2 One to One - One To One			Lunch	Lunch	Lunch	Lunch
5	6	7	8	9	10	11
Lunch					Team 1 One to One - One To One	Team 2 One to One - One To One
12	13	14	15	16	17	18
Team 1 One to One - One To One	Team 2 One to One - One To One		Team 3 One to One - One To One	Team 2 One to One - One To One	Team 2 One to One - One To One	Team 1 One to One - One To One
19	20	21	22	23	24	25
Holiday	Holiday	Holiday	Team 3 One to One - One To One	Team 1 One to One - One To One	Team 1 One to One - One To One	Team 2 One to One - One To One
			Team 3 One to One - One To One		Team 1 One to One - One To One	

The event is color coded as per the Key at the left hand side of the screen.

As Training Manager will schedule team meetings and One to Ones based on the agent scheduled activity in WFM and their manager availability; the manager has to keep their availability in Training Manager up to date.

The manager can enter any non availability time directly into Training Manager through their web portal in the planner view.

To enter any non availability, right click on the required date and three options are presented:

- New entry
- Go to today – this will take the planner view to the current date
- Show 24 hours... - this will present the planner view in a 24 hour view

To enter a holiday for example, select 'New entry'

The screenshot displays the 'Training Manager Training Portal' for user 'Gordon Benson'. The 'manager calendar' is shown in 'Planner View' for September 2010. A key on the left identifies event types: Uncategorised (grey), Holiday (orange), Lunch Break (pink), Management Meeting (blue), Meeting (green), Preparation Time (yellow), and Training Session (dark green). The calendar grid shows dates from 30th August to 26th September. Existing events include 'Lunch' on 30th and 31st, and 'Team 1 Team meeting' on 2nd. A right-click context menu is open over the 14th of September, with options: 'New entry', 'Go to today', and 'Show 24 hours...'. The 'New entry' option is circled in the original image.

The 'New Manager Calendar Entry' template is then presented.

Enter details in the Subject and complete the 'Start time' and 'End time' if the entry is for a single day.

Select the category from the drop down box (this will be color coded as per the key at the left hand side).

To create an entry for multiple days, select 'Recurrence'.

Location : Main Menu > Manager Calendar

Hello, Gordon Benson

manager calendar

Required fields are all shaded in this colour

Key

- Uncategorised
- Holiday
- Lunch Break
- Management Meeting
- Meeting
- Preparation Time
- Training Session

New Manager Calendar Entry

Subject

Start time: 07/09/2010 End time: 07/09/2010 ☒ All day

Category: -

Description

☐ Recurrence

Save Cancel

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	01 Sep	2	3	4	5
Lunch	Lunch		Team 1 Team meeting			
6	7	8	9	10	11	12
13	14	15	16	17	18	19
		Management Meeting				
20	21	22	23	24	25	26

For multiple day entries use Recurrence to create individual event when viewed in the 'Standard View'.

In the example below three days holiday is being entered into the manger's calendar. The start time is 06/09/2010 at 08:00 and the end by date is the 08/09/2010 at 17:00. This will then create 3 separate holiday entries in the standard view.

Location : Main Menu > Manager Calendar
Hello, Gordon Benson
manager calendar
Required fields are all shaded in this colour
Key
Uncategorised
Holiday
Lunch Break
Management Meeting
Meeting
Preparation Time
Training Session

New Manager Calendar Entry

Subject: Holiday
Start time: 06/09/2010 08:00 End time: 06/09/2010 17:00 ☐ All day
Category: -
Description:
☐ Recurrence
Save Cancel

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30 Lunch	31 Lunch	01 Sep	2 Team 1 Team meeting	3	4	5
6	7	8	9	10	11	12
13	14	15 Management Meeting	16	17	18	19
20	21	22	23	24	25	26

Select the relevant 'Category' from the drop down box. This will display the entry with the associated name and color for easy visibility (the categories are created in Training Manager).

Location : Main Menu > Manager Calendar
Hello, Gordon Benson
manager calendar
Required fields are all shaded in this colour
Key
Uncategorised
Holiday
Lunch Break
Management Meeting
Meeting
Preparation Time
Training Session

New Manager Calendar Entry

Subject: Holiday
Start time: 06/09/2010 08:00 End time: 06/09/2010 17:00 ☐ All day
Category:
Description:
☐ Recurrence
Save Cancel

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30 Lunch	31 Lunch	01 Sep	2 Team 1 Team meeting	3	4	5
6	7	8	9	10	11	12
13	14	15 Management Meeting	16	17	18	19
20	21	22	23	24	25	26

After selecting 'Recurrence' the options are then available to select from. As the entry is for 3 days, Daily has been selected, together with 'Every weekday' to exclude weekends and an end date is selected.

New Manager Calendar Entry

Subject:

Start time: End time: ☐ All day

Category:

Description:

☒ Recurrence

☐ Hourly
☒ Daily
☐ Weekly
☐ Monthly
☐ Yearly

☐ Every 1 day(s)
☒ Every weekday

☐ No end date
☐ End after occurrences
☒ End by

Select 'Save' once all of the detail has been completed and the event will then appear in the manager calendar.

manager calendar

Location: Main Menu > Manager Calendar

Hello, Gordon Benson

manager calendar

Required fields are all shaded in this colour

Key


- Uncategorised
- Holiday
- Lunch Break
- Management Meeting
- Meeting
- Preparation Time
- Training Session

Standard View | Planner View

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

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	01 Sep	2	3	4	5
Lunch	Lunch		Team 1 Team meeting			
6	7	8	9	10	11	12
Holiday	Holiday	Holiday				
13	14	15	16	17	18	19
		Management Meeting				
20	21	22	23	24	25	26

This will also appear in the 'Standard View' as an entry for each date.



Location: Main Menu > Manager Calendar

Hello, Gordon Benson

manager calendar

Required fields are all shaded in this colour

Key

- i scheduled
Training or meeting partially or fully scheduled
- i completed
Training no longer requiring action
- i Other
Non-Training Activity

Standard View | Planner View

Search

Start Date 01 September 2010 End Date 24 September 2010 Sort By Manager Go

Gordon Benson

Thursday, 2 September 2010

09:00 - 09:30 Team1 Team meeting - Team Meeting with Gordon Benson

Monday, 6 September 2010

08:00 - 17:00 Holiday

Tuesday, 7 September 2010

08:00 - 17:00 Holiday


Wednesday, 8 September 2010

08:00 - 17:00 Holiday

To edit an existing entry (this is only where an entry has been created in the 'Planner View' as any scheduled Training Manager activity, such as One to Ones or other meetings, can only be amended in Training Manager), select the 'Planner View' and right click on the entry. This will present three options:

- Edit entry – will allow amending the original entry either by individual date or the multiple entry
- Delete entry – will delete the individual date
- Delete all future occurrences – will delete the multiple dates associated to the entry

Select the appropriate option.



Location: Main Menu > Manager Calendar

Hello, Gordon Benson

manager calendar

Required fields are all shaded in this colour

Key

- Uncategorised
- Holiday
- Lunch Break
- Management Meeting
- Meeting
- Preperation Time
- Training Session

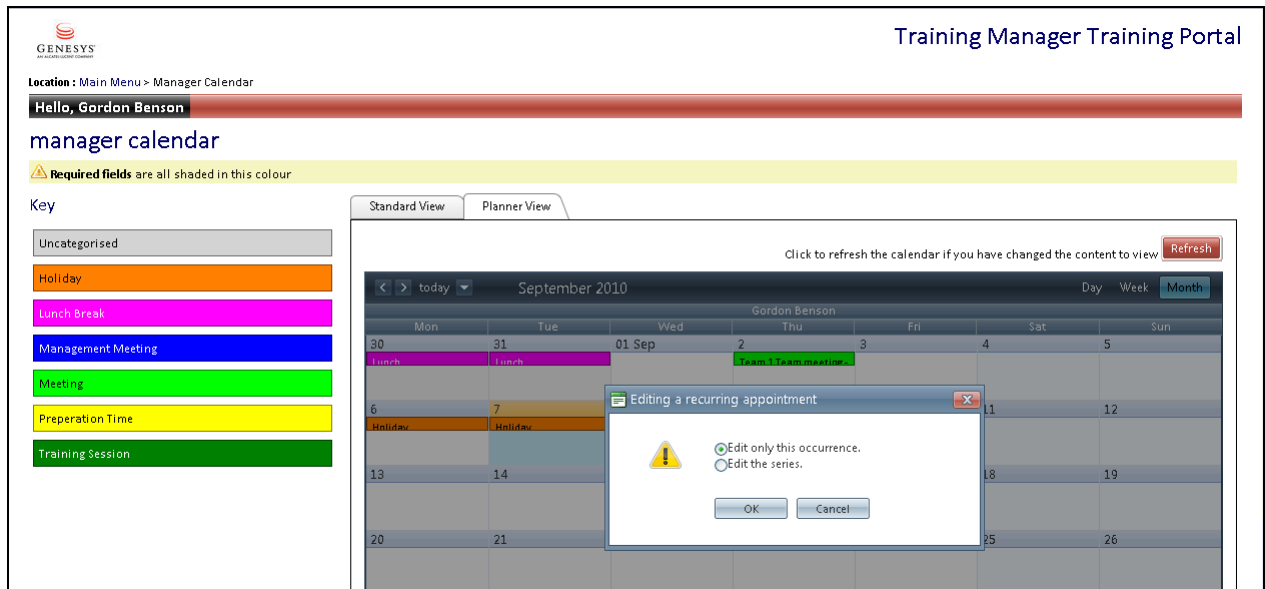
Standard View | Planner View

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

September 2010

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	01 Sep	2	3	4	5
Lunch	Lunch		Team 1 Team meeting			
6	7	8	9	10	11	12
Holiday						
13			16	17	18	19
20	21	22	23	24	25	26

In this example 'Edit entry' has been selected which presents a further option.

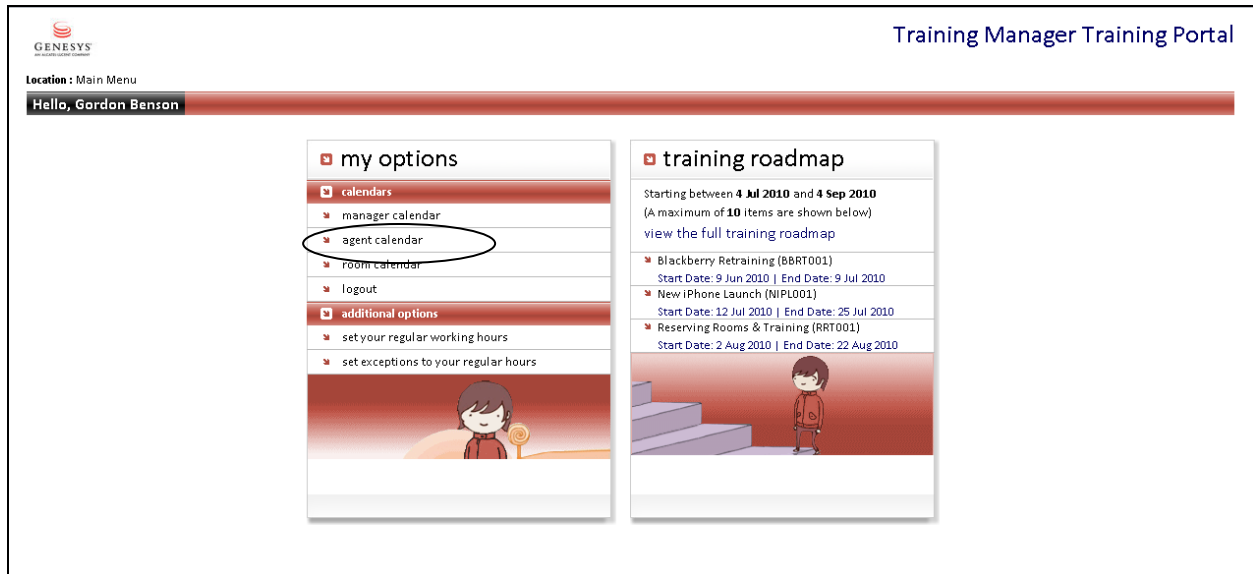


'Edit only this occurrence' – allows for editing the individual date.

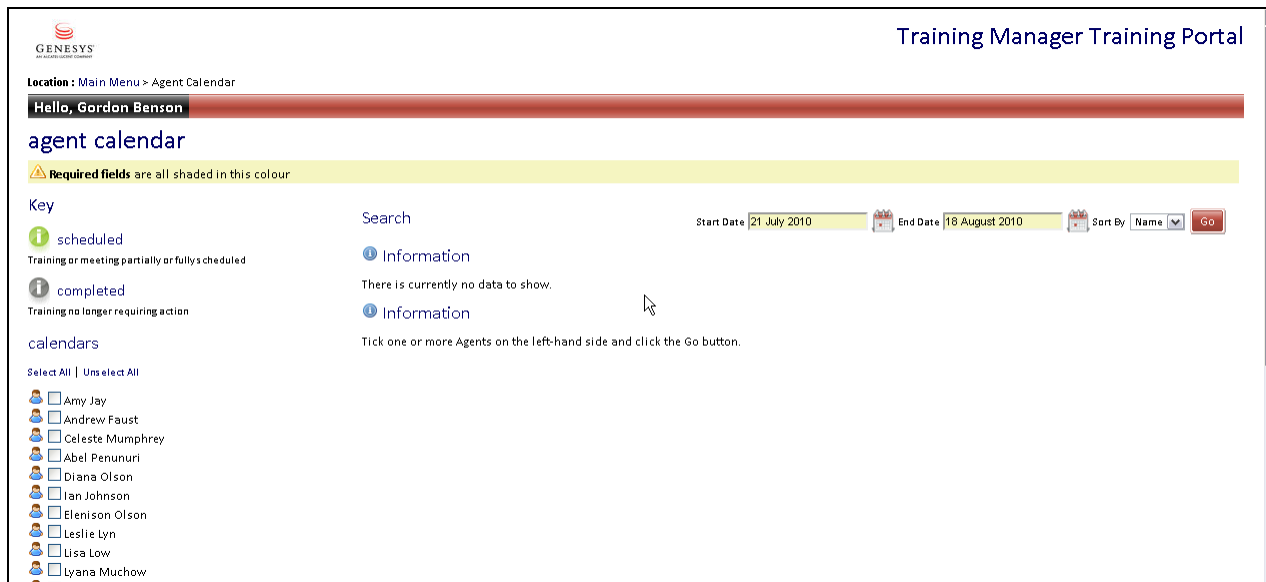
'Edit the series' allows for editing the complete multiple entries.

Agent Calendar

By selecting 'Agent calendar' this will display a list of agents that the manager has access to.



The list of agents names are presented in the bottom left hand corner of the window. (The list of agents may be managed automatically if there has been integration done between Genesys Training Manager Portal and an internal company data source).



By selecting an agent(s) and then clicking on 'Go' this will automatically list the agent(s) training activity within the date range specified.

GENESYS
AN AGENT-POWERED COMPANY

Training Manager Training Portal

Location : Main Menu > Agent Calendar

Hello, Gordon Benson

agent calendar

⚠ Required fields are all shaded in this colour

Key

- scheduled**
Training or meeting partially or fully scheduled
- completed**
Training no longer requiring action

calendars

Select All | Unselect All

- ☒ Amy Jay
- ☐ Andrew Faust
- ☐ Celeste Mumphy
- ☐ Abel Penunuri
- ☐ Diana Olson
- ☐ Ian Johnson
- ☐ Elenison Olson
- ☐ Leslie Lyn
- ☐ Lisa Low
- ☐ Lyana Muchow

Search

Start Date: 21 July 2010 End Date: 18 August 2010 Sort By: Name **Go**

Amy Jay

Wednesday, 21 July 2010

- New iPhone Launch (NIPL001)** Wednesday, 21 July 2010, 15:45 - 16:45

Saturday, 7 August 2010

- Team 1 One to One - One To One** Saturday, 7 August 2010, 16:45 - 17:15

By clicking on the training session this expands to reveal the trainer, room and any session details. The training status is color coded in line with the status indicators.

GENESYS
AN AGENT-POWERED COMPANY

Training Manager Training Portal

Location : Main Menu > Agent Calendar

Hello, Gordon Benson

agent calendar

⚠ Required fields are all shaded in this colour

Key

- scheduled**
Training or meeting partially or fully scheduled
- completed**
Training no longer requiring action

calendars

Select All | Unselect All

- ☒ Amy Jay
- ☐ Andrew Faust
- ☐ Celeste Mumphy
- ☐ Abel Penunuri
- ☐ Diana Olson
- ☐ Ian Johnson
- ☐ Elenison Olson
- ☐ Leslie Lyn
- ☐ Lisa Low
- ☐ Lyana Muchow

Search

Start Date: 21 July 2010 End Date: 18 August 2010 Sort By: Name **Go**

Amy Jay

Wednesday, 21 July 2010

- New iPhone Launch (NIPL001)** Wednesday, 21 July 2010, 15:45 - 16:45

Training Request : New iPhone Launch (NIPL001) **Room :** CSALES Warrington 4

Training Plan : Training Plan 1 **Trainer :** David Hill

Training Plan Event : Event 1

Link :
<http://www.o2.com>

Details :
Public Description

Attendance :
Attended

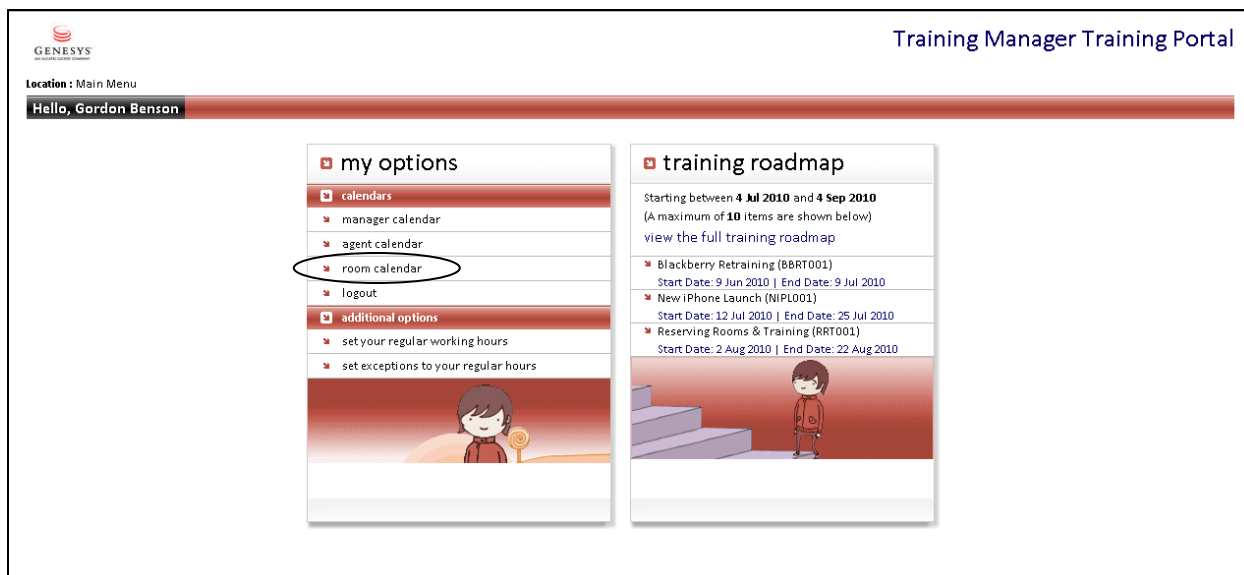
Completion :
Completed

The option to view all of the agent calendar is available by clicking on 'Select All'.

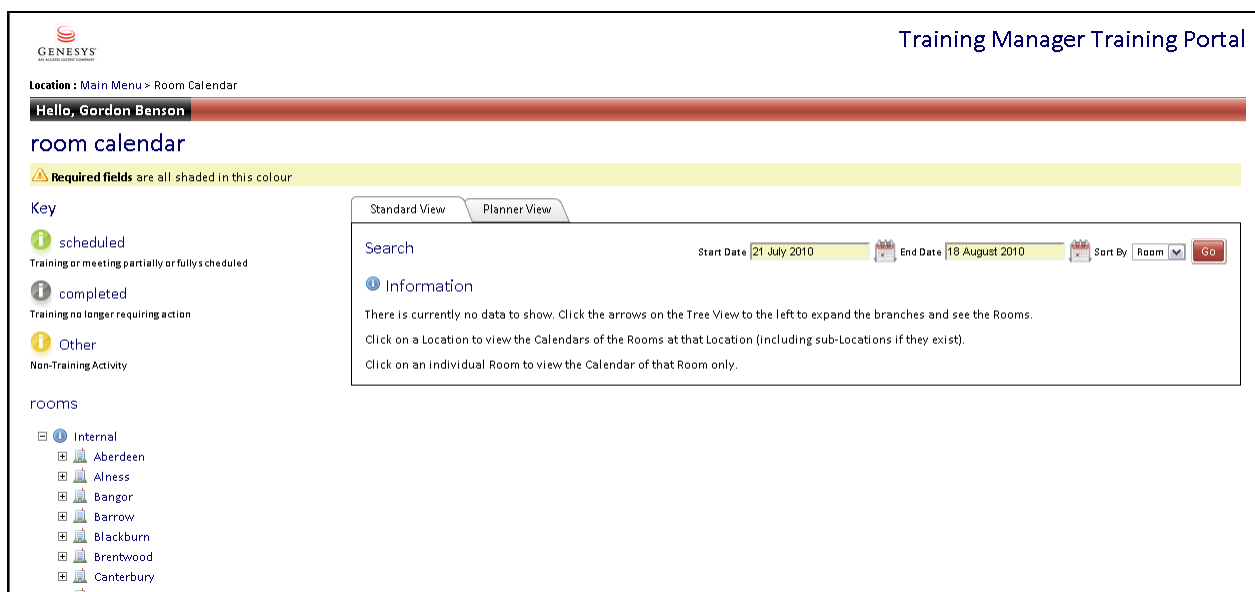
This option allows the manager to view all of the teams scheduled activity. The information is presented in a similar view to the example above, listing all of the scheduled training activity down the right hand side.

Room Calendar

The Manager also has the option to view the training activity by individual room, by selecting 'Room calendar' from the home page.



A list of all of the rooms is displayed against each location in the bottom left hand side of the room calendar window.



Expand the location to reveal the individual rooms.

The screenshot shows the 'Training Manager Training Portal' interface. At the top, the location is set to 'Main Menu > Room Calendar' and the user is 'Gordon Benson'. The page title is 'room calendar'. A yellow banner states: 'Required fields are all shaded in this colour'. On the left, a 'Key' section defines icons for 'scheduled' (green circle with 'i'), 'completed' (grey circle with 'i'), and 'Other' (yellow circle with 'i'). Below the key is a 'rooms' section with a tree view. The tree is currently collapsed, showing only 'Internal' and its sub-items: 'Aberdeen', 'Alness', 'Bangor', and 'Barrow'. The 'Aberdeen' folder is expanded, revealing 'B&E Aberdeen 1', 'B&E Aberdeen 2', and 'SERVICEMNGMT Aberdeen 1'. On the right, there are tabs for 'Standard View' and 'Planner View'. Below the tabs is a search bar with fields for 'Start Date' (21 July 2010), 'End Date' (18 August 2010), and 'Sort By' (Room), followed by a 'Go' button. An 'Information' box explains that there is currently no data to show and provides instructions on how to expand the location tree and click on a room to view its calendar.

Select either the location or an individual room (the date range can be adjusted if required) and then click on 'Go' to view the detail.

This screenshot shows the same portal interface but with the search results displayed. The 'rooms' tree on the left is expanded to show 'B&E Warrington 5' and 'CSALES Warrington 4'. The main content area shows a list of training events. The first event is 'B&E Warrington 5' on 'Friday, 23 July 2010' at '13:30 - 14:30', titled 'NewiPhone Launch (NPL001) - Bent 1 with Janice McCourt', with 10 attendees and a max room seating of 11. The second event is 'CSALES Warrington 4' on 'Wednesday, 21 July 2010' at '11:00 - 12:00', titled 'NewiPhone Launch (NPL001) - Bent 1 with Janice McCourt', with 6 attendees and a max room seating of 11. The third event is 'CSALES Warrington 4' on 'Wednesday, 21 July 2010' at '15:45 - 16:45', titled 'NewiPhone Launch (NPL001) - Bent 1 with David Hill', with 10 attendees and a max room seating of 11. The fourth event is 'CSALES Warrington 4' on 'Thursday, 22 July 2010' at '13:30 - 14:30', titled 'NewiPhone Launch (NPL001) - Bent 1 with Joe Thomas', with 10 attendees and a max room seating of 11. The search bar at the top shows the same date range and 'Sort By Room'.

Click on the training session bar to display the training activity as per the example below.

Training Manager Training Portal

Location : Main Menu > Room Calendar

Hello, Gordon Benson

room calendar

Required fields are all shaded in this colour

Key

scheduled

Training or meeting partially or fully scheduled

completed

Training no longer requiring action

Other

Non-Training Activity

rooms

Internal

Aberdeen

Alness

Bangor

Barrow

Blackburn

Brentwood

Canterbury

Standard ViewPlanner View

Search

Start Date21 July 2010End Date18 August 2010Sort ByRoomGo

B&E Warrington 5

Friday, 23 July 2010

13:30 - 14:30

New iPhone Launch (NIPL001) - Event 1 with Janice McCourt
Attendees: 10. Max. Room Seating: 11

Training Request : New iPhone Launch (NIPL001)

Room : B&E Warrington 5

Training Plan : Training Plan 1

Trainer : Janice McCourt

Training Plan Event : Event 1

Attendees Listed Below :

Details :

Public Description

Employee ID	First Name	Last Name
U_8250_Simulator	Abel	Penunuri
U_8241_Simulator	Diana	Olson
HDunn	Henry	Dunn

Training Roadmap

The latest scheduled training activity will be displayed in the training roadmap in the right hand window, similar to the example below.

Select 'view the training roadmap' to view all of the training sessions currently scheduled in Training Manager.

The screenshot displays the 'Training Manager Training Portal' interface. At the top right, the title 'Training Manager Training Portal' is visible. Below the header, a red bar contains the text 'Location: Main Menu' and 'Hello, Gordon Benson'. The main content area is divided into two panels. The left panel, titled 'my options', lists several menu items: 'calendars' (with sub-items 'manager calendar', 'agent calendar', 'room calendar', and 'logout'), and 'additional options' (with sub-items 'set your regular working hours' and 'set exceptions to your regular hours'). The right panel, titled 'training roadmap', shows a list of training sessions. The first session is 'BlackBerry Retraining (BBRT001)' with a start date of 9 Jun 2010 and an end date of 9 Jul 2010. The second session is 'New iPhone Launch (NIPLO01)' with a start date of 12 Jul 2010 and an end date of 25 Jul 2010. The third session is 'Reserving Rooms & Training (RRT001)' with a start date of 2 Aug 2010 and an end date of 22 Aug 2010. A link 'view the full training roadmap' is circled in the right panel. The bottom of the interface features a cartoon illustration of a person standing on a set of stairs.

Any scheduled training activity will be presented in the right hand side of the window for the date range selected and by clicking on the training session additional details are available.

The training is color coded based on the status indicators.

There is the option to filter the sessions using the 'sort by' pull down box.

The training is color coded based on the status indicators.

GENESYS
Training Manager Training Portal

Location: Main Menu > Training Roadmap

Hello, Gordon Benson

training roadmap

Required fields are all shaded in this colour

Key

Click any status below to filter

- Unscheduled
Training awaiting scheduling
- scheduled
Training or meeting partially or fully scheduled
- completed
Training no longer requiring action

Show All

Start Date: 04 July 2010 End Date: 04 September 2010 Sort By: Date Go

Blackberry Retraining (BBRT001)	Start Date: Wednesday, 9 June 2010
New iPhone Launch (NIPL001)	Start Date: Monday, 12 July 2010
Reserving Rooms & Training (RRT001)	Start Date: Monday, 2 August 2010

Click on the training session to reveal any additional details, such as Objectives or Additional Notes. The training sessions can also be filtered using the 'sort by' pull down box.

GENESYS
Training Manager Training Portal

Location: Main Menu > Training Roadmap

Hello, Gordon Benson

training roadmap

Required fields are all shaded in this colour

Key

Click any status below to filter

- Unscheduled
Training awaiting scheduling
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Show All

Start Date: 04 July 2010 End Date: 04 September 2010 Sort By: Date Go

Blackberry Retraining (BBRT001)	Start Date: Wednesday, 9 June 2010
New iPhone Launch (NIPL001)	Start Date: Monday, 12 July 2010
Reserving Rooms & Training (RRT001)	Start Date: Monday, 2 August 2010

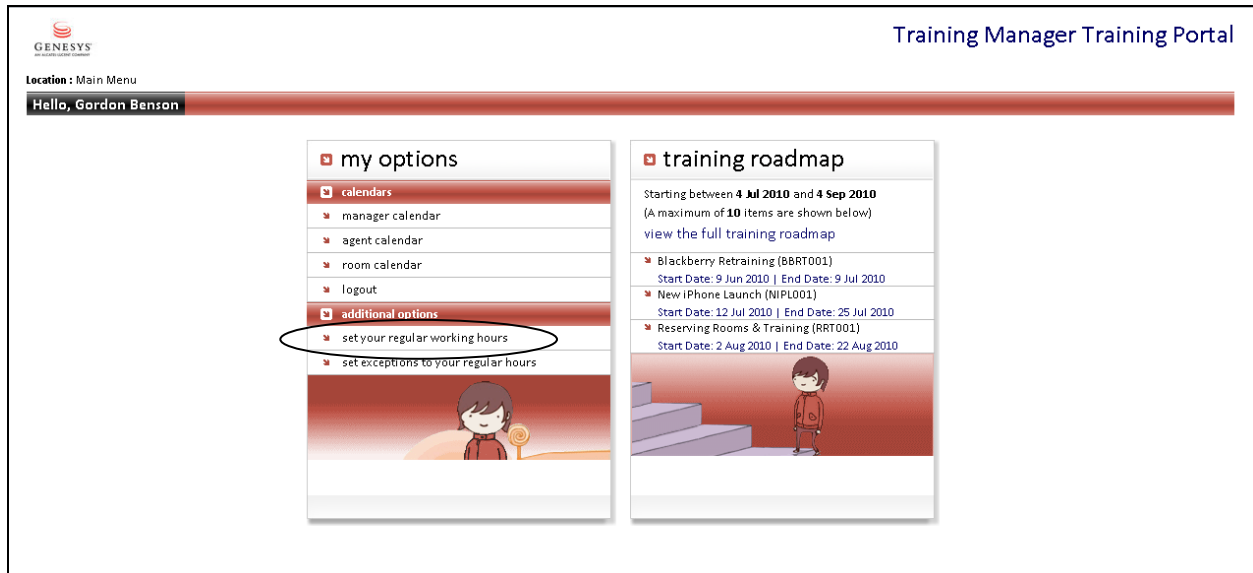
Objectives
Supporting training based on skill gaps identified

Additional Notes
This training is required across all areas impacted by the scheduled marketing activity

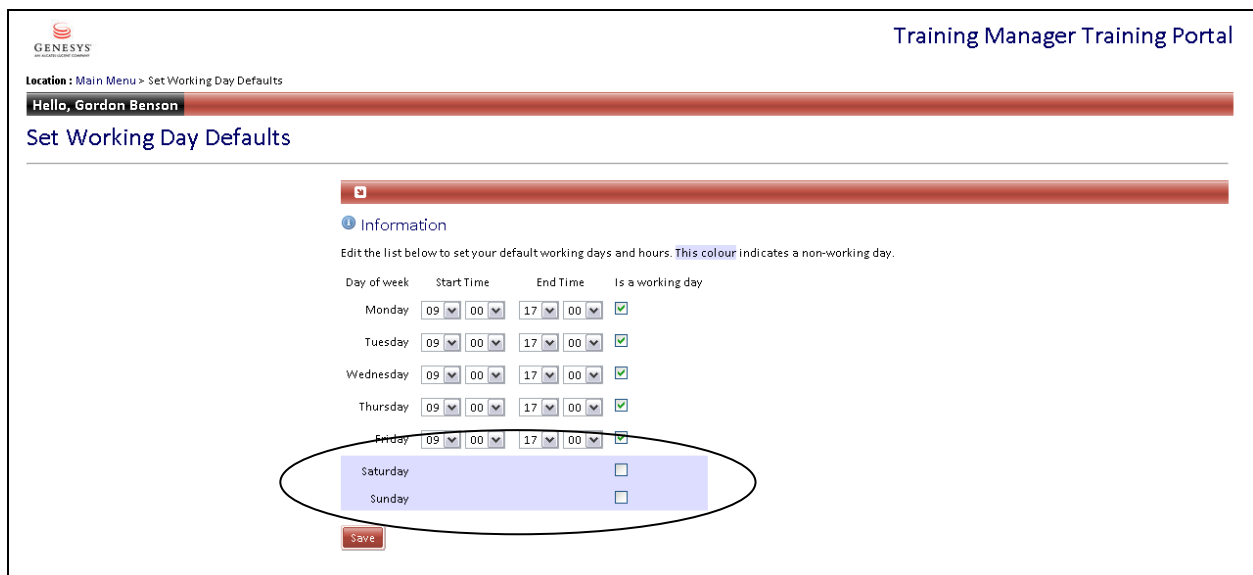
Set Working Day Defaults

To be able to schedule Team Meetings and One to One's Training Manager needs to understand the manager's availability and working hours (the agents reporting to the manager scheduled hours are taken directly from Genesys WFM).

Select 'set working day defaults' to view the manager's current default working hours'.



This will present the default hours as per the example below. The manager doesn't work Saturday or Sunday and therefore these days are not selected and are highlighted.



To change the default hours use the drop down box to select the required time. To change the working days either select or deselect the days using the box at the right hand side under 'Is a working day'.

These default working hours feed into the next section of 'set working days'.

GENESYS
Location: Main Menu > Set Working Day Defaults
Hello, Gordon Benson
Set Working Day Defaults

Training Manager Training Portal

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Set your default working days and hours. This colour indicates a non-working day.

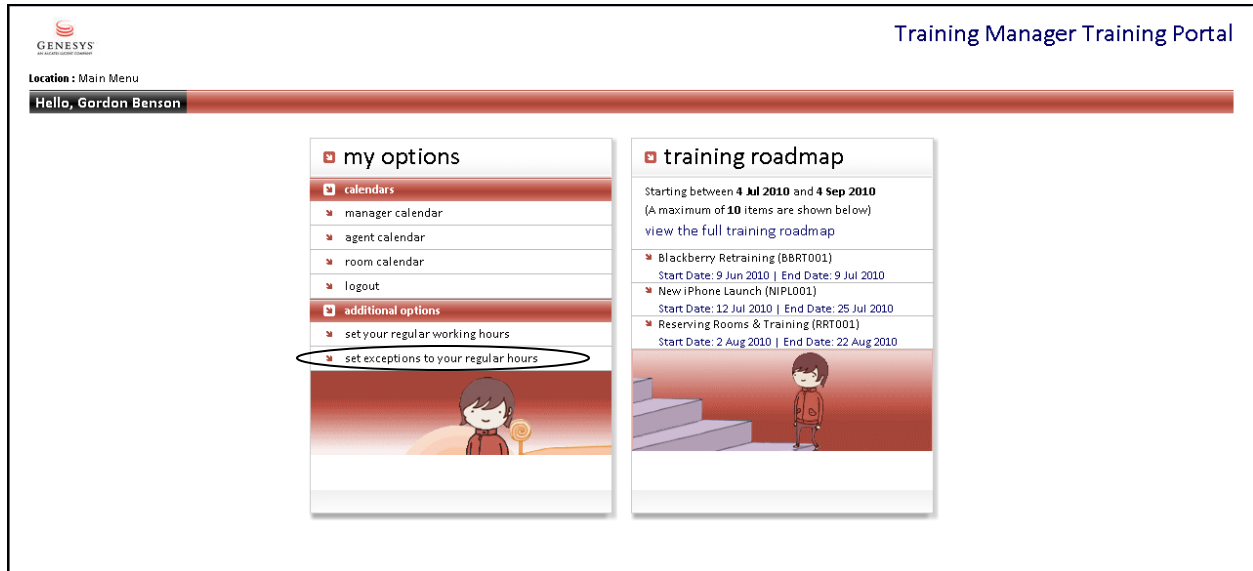
Day of week	Time	End Time	Is a working day		
Monday	00	17	00	<input checked="" type="checkbox"/>	
Tuesday	09	00	17	00	<input checked="" type="checkbox"/>
Wednesday	09	00	17	00	<input checked="" type="checkbox"/>
Thursday	09	00	17	00	<input checked="" type="checkbox"/>
Friday	09	00	17	00	<input checked=""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

Save

Set Exceptions to Your Regular Hours


The default working hours feed through to the working days / hours of the manager and Training Manager uses this information to identify when the manager is available to schedule any meeting activity.

Any changes to the manager's regular hours can be made in 'set exceptions to your regular hours'.



In the example below weekends are identified as non working days for the manager as per the last section 'setting default hours.'

Note: No amendments can be made in the immediate 14 day period.



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: August 2010


Day of week	Use default hours	Start Time	End Time	Is a working day
Sun 1	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Mon 2	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Tue 3	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Wed 4	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Thu 5	<input checked="" type="checkbox"/>	09:00	17:00	<input checked="" type="checkbox"/>
Fri 6	<input type="checkbox"/>	11:00	19:00	<input checked="" type="checkbox"/>
Sat 7	<input checked="" type="checkbox"/>			<input type="checkbox"/>

To make any changes deselect the date required, to indicate the hours are not the default working hours.

Change the hours using the drop down box available and select the required hours.

Leave the 'It is a working day' selected and Training Manager will use these changed hours if scheduling any activity on that date.

This template should not be used for changing hours due to holidays; this is only used where the manager is working different hours to their normal working hours.



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: 2010

Day of week	Use default hours	Start Time	End Time	Is a working day
Thu 1	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Fri 2	<input type="checkbox"/>			<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	18:00	<input checked="" type="checkbox"/>
Tue 6	<input checked="" type="checkbox"/>	09:00	18:00	<input checked="" type="checkbox"/>

Deselect the date required

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