



## **Genesys Training Manager 8.0**

# **Web Portal Trainer Manager Guide**

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## Chapter

# 1 Preface

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

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

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**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](mailto: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](#).

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## About Genesys Training Manager

Genesys Training Manager enables companies to create, manage, and schedule multiple agent training activity and team meeting 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, 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.

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## Intended Audience

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

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## 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](mailto: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.

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# 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	<a href="mailto:support@genesyslab.com">support@genesyslab.com</a>
Europe, Middle East, and Africa	+44-(0)-1276-45-7002	<a href="mailto:support@genesyslab.co.uk">support@genesyslab.co.uk</a>
Asia Pacific	+61-7-3368-6868 (International)	<a href="mailto:support@genesyslab.com.au">support@genesyslab.com.au</a>
Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868 (International)	<a href="mailto:support@genesyslab.com.au">support@genesyslab.com.au</a>
India	1-800-407-436379 (toll-free) +61-7-3368-6868 (International)	<a href="mailto:support@genesyslab.com.au">support@genesyslab.com.au</a>
Japan	+81-3-6361-8950	<a href="mailto:support@genesyslab.co.jp">support@genesyslab.co.jp</a>
Before contacting technical support, refer to the <i>Genesys Technical Support Guide</i> for complete contact information and procedures.		

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## 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](mailto:orderman@genesyslab.com).

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## Document Conventions

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

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## 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.

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## 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.



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# 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"><li>Document titles</li><li>Emphasis</li><li>Definitions of (or first references to) unfamiliar terms</li><li>Mathematical variables</li></ul> 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, <math>x + 1 = 7</math> where <math>x</math> 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"><li>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.</li><li>The values of options.</li><li>Logical arguments and command syntax.</li><li>Code samples.</li></ul> 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><b>Note:</b> 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 &lt;confighost&gt;</pre>
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## Chapter

# 2 **Web Portal Trainer Manager**

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## **Trainer Manager**

The Trainer Manager has access to:

- Trainer calendar
- Room calendar
- Training roadmap
- View other trainer's Calendars
- Set your regular working hours

When the Trainer logs on to the system they are presented with a home page view, similar to the example below.

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

Training details will only be visible in the portal if training sessions have been scheduled and been approved as 'good to go'.

Location: Main Menu

Hello, Eddie Talbot

### my options

#### calendars

- trainer calendar
- room calendar

#### logout

#### additional options

- view other trainer's calendars
- set your regular working hours



### training roadmap

Starting between **4 Jul 2010** and **4 Sep 2010**  
(A maximum of **10** items are shown below)

[view the full training roadmap](#)

- Blackberry Retraining (BBRT001)  
Start Date: 9 Jun 2010 | End Date: 9 Jul 2010
- New iPhone Launch (NIPL001)  
Start Date: 12 Jul 2010 | End Date: 25 Jul 2010
- Reserving Rooms & Training (RRT001)  
Start Date: 2 Aug 2010 | End Date: 22 Aug 2010



# My Options

## Trainer Calendar

By selecting 'Trainer Calendar' this presents the trainer calendar view and by default the Standard View is always presented.

There are three options available for the Trainer Manager to view the Trainers that report into them and their scheduled training activity:

1. View by Location
2. View by Alphabetical Order
3. View by Hierarchy

'View by Location' presents the locations in the bottom left hand corner of the window and where a location can be expanded, this indicates that there is at least one Trainer associated to that location. Expand the location to view the associated Trainers.

Select a trainer to view their calendar and amend the date range as required and then click on 'Go'.

This will list all of the scheduled activity for the trainer selected within the date range.

The screenshot displays the 'Training Manager Training Portal' interface. At the top, the Genesys logo and 'Training Manager Training Portal' are visible. Below the header, the user is logged in as 'Hello, Eddie Talbot'. The main section is titled 'trainer calendar'. A key indicates that scheduled training is shown in green and completed training in red. The left sidebar shows the 'trainer' section with three view options: 'View by Location' (selected), 'View by Alphabetical Order', and 'View by Hierarchy'. Below these, a list of trainers is shown, with 'David Hill [122345678]' selected. The main content area shows the calendar for David Hill, with a date range from '04 May 2010' to '18 August 2010'. The calendar lists several events, including 'Scenario Test (SCT001) - Event 1 in CSALES Warrington4' and 'New Tariff Launch (NTL001) - Event 1 in CSALES Warrington4'. The events are color-coded: green for scheduled and red for completed. The 'Standard View' tab is selected, and the 'Go' button is highlighted.

The status of the training activity is color coded in line with the status indicators.

**Scheduled** – training is partially or fully scheduled and the agents will have this training scheduled in Genesys WFM

**Completed** – training has been completed and this is for information only

**Other** – this is for activity other than training that the Trainers have scheduled, for example, a holiday or meeting.

'View by Hierarchy' presents the Trainer Manager with the option to expand to view any trainers that report into them.

The screenshot shows the 'Training Manager Training Portal' interface. The breadcrumb trail is 'Location: Main Menu > Trainer Calendar'. A red banner says 'Hello, Eddie Talbot'. The page title is 'trainer calendar'. A yellow banner states 'Required fields are all shaded in this colour'. On the left, a 'Key' section defines icons for 'scheduled' (green), 'completed' (grey), and 'Other' (yellow). Below this, a 'trainer' section shows filters: 'View by Location', 'View by Alphabetical Order', and 'View by Hierarchy' (selected). A 'Select All | Unselect All' link is present. A list of trainers includes 'Eddie Talbot [trainer\_manager]', 'Alyson Bushel [700657979]', and 'David Hill [12345678]'. The main content area has tabs for 'Standard View' and 'Planner View'. A search bar shows 'Start Date: 04 May 2010', 'End Date: 18 August 2010', 'Sort By: Trainer', and a 'Go' button. Below the search bar, a red banner identifies 'David Hill'. The calendar shows events for David Hill: 'Wednesday, 5 May 2010' (09:15 - 12:15, Scenario Test (SCT001) - Event 1 in CSALES Warrington4, Attendees: 2, Max. Room Seating: 11), 'Tuesday, 11 May 2010' (11:45 - 14:45, Scenario Test (SCT001) - Event 1 in CSALES Warrington4, Attendees: 2, Max. Room Seating: 11), 'Friday, 21 May 2010' (10:45 - 13:45, Scenario Test (SCT001) - Event 1 in CSALES Warrington4, Attendees: 2, Max. Room Seating: 11), 'Friday, 4 June 2010' (10:15 - 11:15, New Tariff Launch (NTL001) - Event 1 in CSALES Warrington4, Attendees: 2, Max. Room Seating: 11), and 'Wednesday, 16 June 2010' (New Tariff Launch (NTL001) - Event 1 in CSALES Warrington4).

By expanding and selecting the required trainer and date range will reveal any scheduled activity. The Trainer Manager can also view their activity by selecting themselves and the relevant date range.

The screenshot shows the 'Training Manager Training Portal' interface. The breadcrumb trail is 'Location: Main Menu > Trainer Calendar'. A red banner says 'Hello, Eddie Talbot'. The page title is 'trainer calendar'. A yellow banner states 'Required fields are all shaded in this colour'. On the left, a 'Key' section defines icons for 'scheduled' (green), 'completed' (grey), and 'Other' (yellow). Below this, a 'trainer' section shows filters: 'View by Location', 'View by Alphabetical Order', and 'View by Hierarchy' (selected). A 'Select All | Unselect All' link is present. A list of trainers includes 'Eddie Talbot [trainer\_manager]', 'Alyson Bushel [700657979]', and 'David Hill [12345678]'. The main content area has tabs for 'Standard View' and 'Planner View'. A search bar shows 'Start Date: 04 May 2010', 'End Date: 18 August 2010', 'Sort By: Trainer', and a 'Go' button. Below the search bar, a red banner identifies 'Alyson Bushel'. The calendar shows events for Alyson Bushel: 'Monday, 17 May 2010' (00:00 - 00:00, Holiday), 'Wednesday, 19 May 2010' (00:00 - 01:00, Holiday), 'Tuesday, 8 June 2010' (00:00 - 00:00, Holiday), and 'Wednesday, 9 June 2010' (00:00 - 00:00, Holiday). A red oval highlights the search bar area.

To view the training information, click on the training session detail. This will expand to reveal the room allocated, together with the list of attendees and any information associated to the session, for example, whether all of the attendees completed the training

**Training Manager Training Portal**

Location: Main Menu > Trainer Calendar  
Hello, Eddie Talbot

### trainer 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

**trainer**  
☐ View by Location  
☐ View by Alphabetical Order  
☒ View by Hierarchy  
Select All | Unselect All  
☐ Eddie Talbot [trainer\_manager]  
☐ Alyson Bushel [700657979]  
☒ David Hill [12345678]

Standard View
Planner View

Search
Start Date 01 June 2010 End Date 18 August 2010 Sort By Trainer Go

Go to Advanced Search

David Hill

Friday, 4 June 2010

**10:15 - 11:15** New Tariff Launch (NTL001) - Event 1 in CSALES Warrington 4  
Attendees: 2, Max. Room Seating: 11

**Training Request :** New Tariff Launch (NTL001)
 **Room :** CSALES Warrington 4

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

**Training Plan Event :** Event 1
 **Attendees Listed Below :**

Employee ID	First Name	Last Name
U_8236_Simulator	Kerry	Nedham
U_8271_Simulator	Linda	Rhodes

Attendance Register



## Calendar Report View

There is also the option to view any Trainer activity in a calendar format by selecting 'Planner View' as per the example below.

The detail can be viewed by Day, Week or Month by selecting the relevant options.

This view gives the Training Manager a high level view of their Trainers training activity and the activity is color coded for easy visibility.

In this example two trainers Calendars have been selected.

Hovering over any scheduled training activity will reveal some information about the training.

trailer calendar

Required fields are all shaded in this colour

Key

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

trainer

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

Select All | Unselect All

- ☐ Eddie Talbot [trainer\_manager]
- ☒ Alyson Bushel [700657979]
- ☒ David Hill [12345678]
- ☒ Gavin Byrne [701572592]
- ☐ Janice McCourt [701034427]

Standard View **Planner View**

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

June 2010

Day Week Month

Alyson Bushel							David Hill							Gavin Byrne						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	01 Jun	2	3	4	5	6	31	01 Jun	2	3	4	5	6	31	01 Jun	2	3	4	5	6
											New									
7	8	9	10	11	12	13	7	8	9	10	11	12	13	7	8	9	10	11	12	13
	Holiday	Holiday	Holiday	Holiday																
14	15	16	17	18	19	20	14	15	16	17	18	19	20	14	15	16	17	18	19	20
									New											
21	22	23	24	25	26	27	21	22	23	24	25	26	27	21	22	23	24	25	26	27
		Holiday																		
28	29	30	01 Jul	2	3	4	28	29	30	01 Jul	2	3	4	28	29	30	01 Jul	2	3	4

To insert unavailable time into a trainer's calendar, right click in the calendar and select 'New Entry'.

The screenshot shows the 'trainer calendar' interface. On the left, there is a 'Key' section with color-coded categories: Uncategorised (grey), Holiday (orange), Management Meeting (blue), Meeting (green), and Training Session (dark green). Below this is a 'trainer' section with radio buttons for 'View by Location', 'View by Alphabetical Order', and 'View by Hierarchy' (selected). A list of trainers is shown with checkboxes: Eddie Talbot (trainer\_manager), Alyson Bushel (700657979), David Hill (12345678), Gavin Byrne (701572592), and Janice McCourt (701034427). The main calendar area shows a grid for September 2010. A right-click context menu is open over the calendar, with options: 'New entry' (circled), 'Go to today', and 'Show 24 hours...'. A 'Refresh' button is visible in the top right corner of the calendar area.

The option is then available to select the required categories from the drop down box, together with the date and any details. If the event is for more than one consecutive day, then the recurrent option has to be used. This creates individual entries for each day in the standard view list.

The screenshot shows the 'New Trainer Calendar Entry' dialog box. It has fields for 'Subject' (Holiday), 'Start time' (09/09/2010 08:00), 'End time' (09/09/2010 17:00), and an 'All day' checkbox. There is a 'Category' dropdown menu with a list of categories: Holiday, Management Meeting, and Training Session. A 'Description' field is also present. A 'Recurrence' checkbox is at the bottom left. 'Save' and 'Cancel' buttons are at the bottom right. The background shows the same calendar interface as the previous screenshot.

Select the relevant recurrence , for example, Daily, and then an ‘End by’ date and ‘Save’.

**Edit Trainer Calendar Entry**

Subject: Holiday

Start time: 09/09/2010 08:00 End time: 09/09/2010 17:00 ☐ All day

Category: Holiday

Description:

☒ Recurrence

☐ Hourly  
☒ Daily  
☐ Weekly  
☐ Monthly  
☐ Yearly

☐ Every 1 day(s)  
☒ Every weekday

☐ No end date  
☐ End after occurrences  
☒ End by 10/09/2010

Save Cancel

The scheduled activity will then be displayed in the ‘Standard’ view as multiple day entries.

**trainer 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

**trainer**

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

Select All | Unselect All

☐ Eddie Talbot [trainer\_manager]  
☒ Alyson Bushel [700657979]  
☐ David Hill [12345678]  
☐ Gavin Byrne [701572592]  
☐ Janice McCourt [701034427]  
☐ Joe Thomas [803251043]

**Standard View** **Planner View**

Search Start Date: 01 September 2010 End Date: 17 September 2010 Sort By: Trainer Go

**Alyson Bushel**

**Thursday, 9 September 2010**

**08:00 - 17:00** Holiday

**Friday, 10 September 2010**

**08:00 - 17:00** Holiday

## Advanced Search Option

There is now an Advanced Search Option available in the Standard View window.

Click on 'Advanced Search Option' and Select Advanced Search and a table appears in the bottom left hand corner

The screenshot shows the 'Training Manager Training Portal' interface. At the top, it says 'Location: Main Menu > Trainer Calendar > Trainer Calendar (Advanced Search)'. Below this is a greeting 'Hello, Eddie Talbot'. The main heading is 'trainer calendar'. A yellow banner states 'Required fields are all shaded in this colour'. On the left, there is a 'Key' section with icons for 'scheduled', 'completed', and 'Other'. The 'scheduled' icon is highlighted. Below the key, there are tabs for 'Categories', 'Locations', and 'Managers'. The 'Categories' tab is selected, showing a list of categories: 'Internal' and 'External'. Below this, there is a 'Match ANY Criteria' dropdown and a 'Get Trainers' button. On the right, there is a 'Search' button, a 'Return to Basic Search' link, and an 'Information' link. Below these, it says 'There is currently no data to show.'.

There are different options available to search for a Trainer that matches the required criteria.

The diagram illustrates the search options available in the Advanced Search interface. It shows three overlapping panels. The top panel shows the 'Categories' tab with 'Internal' and 'External' options. The middle panel shows the 'Locations' tab with a list of locations: Aberdeen, Alness, Bangor, Barrow, Blackburn, Brentwood, and Canterbury. The bottom panel shows the 'Skills' tab with a list of skills: Microsoft Excel, Microsoft Word, Microsoft PowerPoint, and Microsoft Outlook. Each panel has a 'Match ANY Criteria' dropdown and a 'Get Trainers' button. A large curved arrow on the left indicates the flow from the 'Categories' panel to the 'Locations' panel, and then to the 'Skills' panel.

Select the relevant options to search against and then in the drop down box the option to Match ANY criteria or Match ALL criteria is available for selection, then click on 'Get Trainers'.

CategoriesLocationsSkills

☐ Microsoft Excel  
☐ Microsoft Word  
☐ Microsoft PowerPoint  
☐ Microsoft Outlook

Match ANY Criteria

Match ANY Criteria

Match ALL Criteria

Get Trainers

Any Trainers that match the criteria will then be presented.

Select the required trainer and date filter to view the Trainers calendar.

Hello, Eddie Talbot

trainer 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

CategoriesLocationsManagers

Skills

☒ Internal  
☐ External

Match ALL Criteria

Get Trainers

Standard ViewPlanner View

Search

Start Date 01 September 2010End Date 17 September 2010Sort By TrainerGo

Return to Basic Search

David Hill

Tuesday, 7 September 2010

08:00 - 17:00

Holiday

Wednesday, 8 September 2010

08:00 - 17:00

Holiday

Thursday, 9 September 2010

08:00 - 17:00

Holiday

trainer list

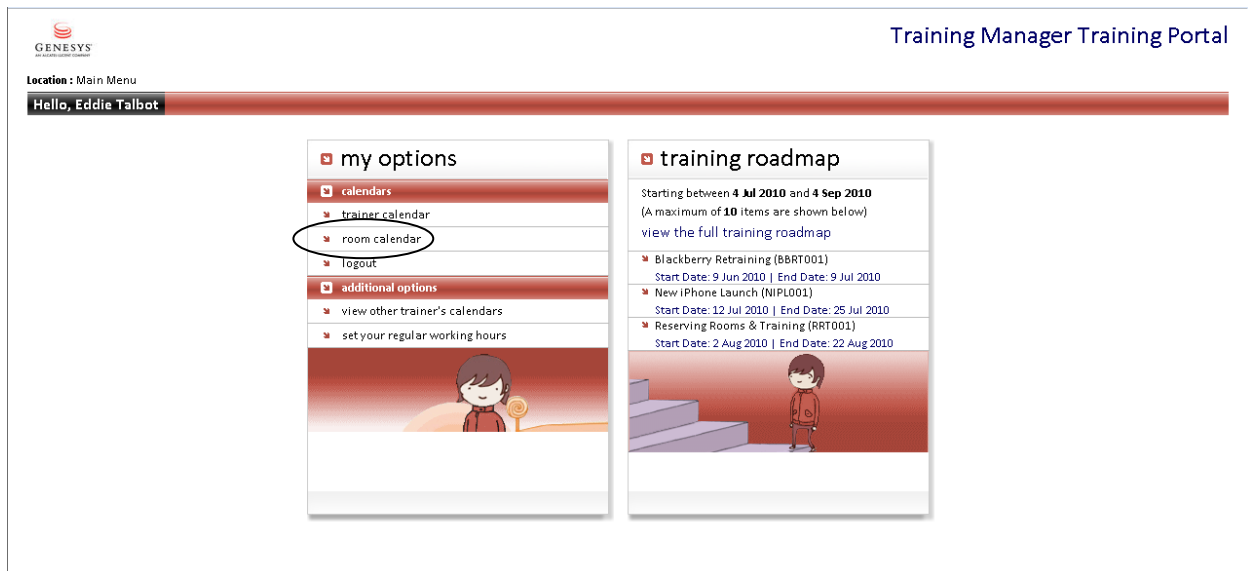
☐ Alyson Bushel  
☒ David Hill  
☐ Gavin Byrne  
☐ Janice McCourt  
☐ Joe Thomas

## Room Calendar

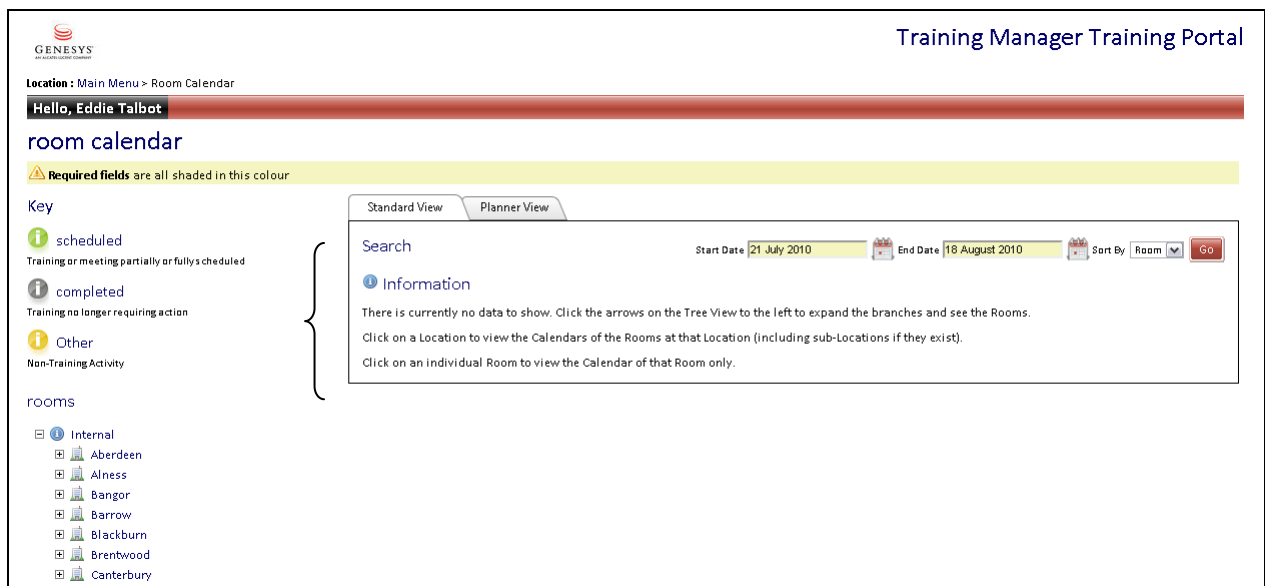
To view the room Calendar select Room Calendar from the home page

Genesys Training Manager — Web Portal Trainer Manager Guide

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A list of locations is then displayed in the left hand corner of the page and there will be the option to expand the tree view if there are any rooms associated.



Expand the location to reveal the associated rooms.

Training Manager Training Portal

Location : Main Menu > Room Calendar

Hello, Eddie Talbot

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

B&E Aberdeen 1

B&E Aberdeen 2

SERVICEMNGMT Aberdeen 1

Alness

Bangor

Barrow

Standard View

Planner View

Search

Start Date

21 July 2010

End Date

18 August 2010

Sort By

Room

Go

Information

There is currently no data to show. Click the arrows on the Tree View to the left to expand the branches and see the Rooms.

Click on a Location to view the Calendars of the Rooms at that Location (including sub-Locations if they exist).

Click on an individual Room to view the Calendar of that Room only.

In the example below the location has been selected rather than an individual room and any activity within the location is displayed under each room.

Training Manager Training Portal

Location : Main Menu > Room Calendar

Hello, Eddie Talbot

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

B&E Aberdeen 1

B&E Aberdeen 2

SERVICEMNGMT Aberdeen 1

Alness

Bangor

Barrow

Standard View

Planner View

Search

Start Date

21 July 2010

End Date

18 August 2010

Sort By

Room

Go

B&E Warrington 5

Friday, 23 July 2010

13:30 - 14:30

New iPhone Launch (NIPLO01) - Event 1 with Janice McCourt  
Attendees: 10. Max. Room Seating: 11

CSALES Warrington 4

Wednesday, 21 July 2010

11:00 - 12:00

New iPhone Launch (NIPLO01) - Event 1 with Janice McCourt  
Attendees: 6. Max. Room Seating: 11

15:45 - 16:45

New iPhone Launch (NIPLO01) - Event 1 with David Hill  
Attendees: 10. Max. Room Seating: 11

Thursday, 22 July 2010

12:30 - 13:30

New iPhone Launch (NIPLO01) - Event 1 with Joe Thomas

Genesys Training Manager — Web Portal Trainer Manager Guide

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Click on the training session to reveal the training detail, this will include who the Trainer is and the scheduled attendees.

The screenshot displays the Genesys Training Manager Training Portal. The header includes the Genesys logo and the text "Training Manager Training Portal". Below the header, the location is set to "Main Menu > Room Calendar" and a greeting "Hello, Eddie Talbot" is shown. The main section is titled "room calendar" and includes a note: "Required fields are all shaded in this colour".

On the left, a "Key" section defines the status of training sessions: "scheduled" (green icon), "completed" (grey icon), and "Other" (yellow icon). Below the key is a "rooms" section with a tree view showing internal rooms: Aberdeen (B&E Aberdeen 1, B&E Aberdeen 2, SERVICE MGMT Aberdeen 1), Alness, Bangor, and Barrow.

The main calendar area shows a search bar with "B&E Warrington 5" entered. The date range is from 21 July 2010 to 18 August 2010. The calendar view for Friday, 23 July 2010, highlights a training session from 13:00 to 14:30. A black arrow points from the "scheduled" key icon to this session.

Clicking on the session reveals the following details:

- Training Request:** New iPhone Launch (NIPLO01)
- Room:** B&E Warrington 5
- Training Plan:** Training Plan 1
- Trainer:** Janice McCourt
- Training Plan Event:** Event 1
- Attendees Listed Below:**

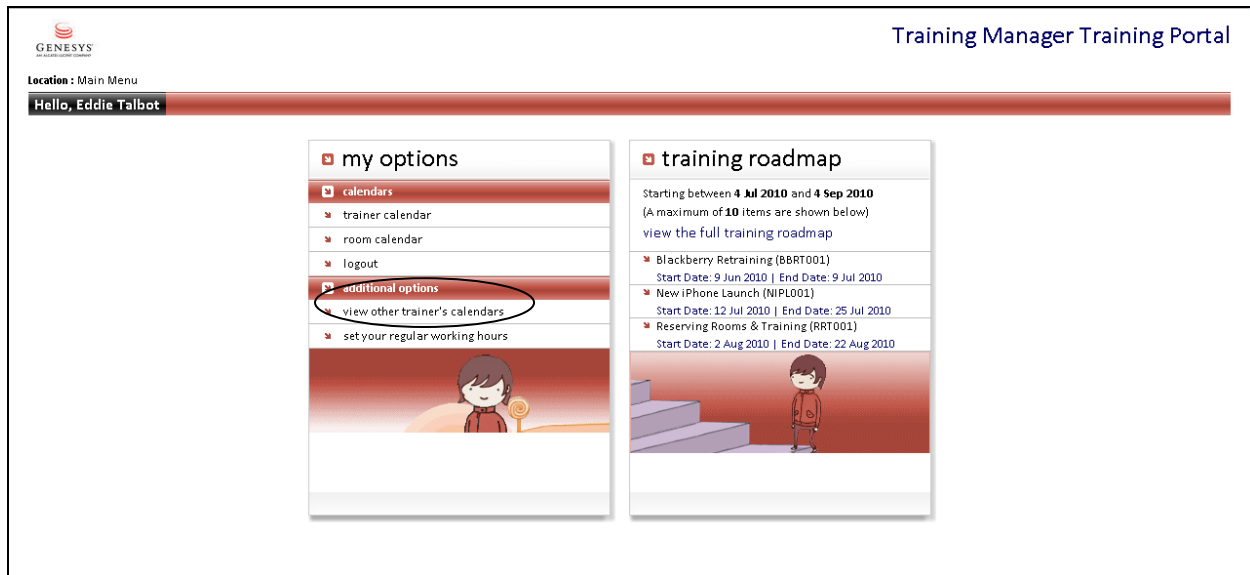
**Details:** Public Description

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



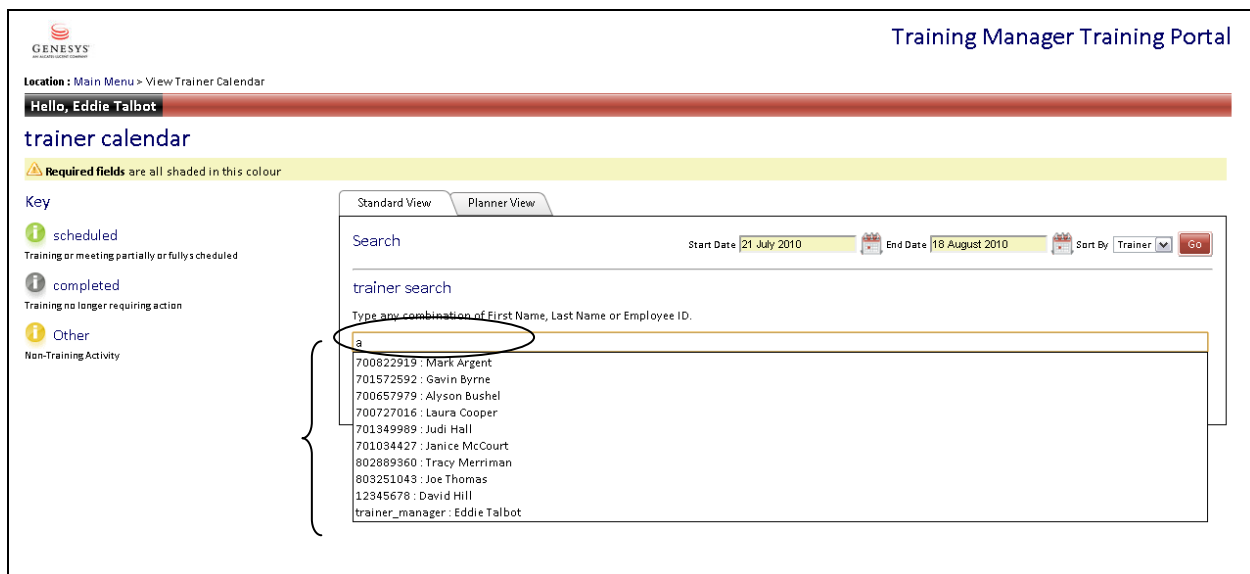
## View Other Trainer's Calendar

Trainers have the ability to view other trainer's Calendar by selecting 'view other trainer's Calendar'. This may not be applicable to the Trainer Manager as they can already view the trainer calendars that report into them, but the option is available.



The 'trainer calendar' view is then presented and in the 'trainer search', type in any combination of First, Last Name or Employee ID to find the required trainer.

Entering information in the 'trainer search' will bring up a list of trainers to select from.



After selecting the required trainer, amend the date range and click on 'Go'.

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Training Manager Training Portal

Location: Main Menu > View Trainer Calendar

Hello, Eddie Talbot

### trainer 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 **21 July 2010** End Date **18 August 2010** Sort By **Trainer** **Go**

trainer search

Type any combination of First Name, Last Name or Employee ID.

12345678 : David Hill

Information

There is currently no data to show.

Any activity associated to the trainer will then be visible.

Click on the training session bar to view the training detail.

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Training Manager Training Portal

Location: Main Menu > View Trainer Calendar

Hello, Eddie Talbot

### trainer 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 **21 July 2010** End Date **18 August 2010** Sort By **Trainer** **Go**

trainer search

Type any combination of First Name, Last Name or Employee ID.

David Hill

Wednesday, 21 July 2010

**15:45 - 16:45** New iPhone Launch (NIPL001) - Event 1 in CSALES Warrington 4  
Attendees: 10. Max. Room Seating: 11

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

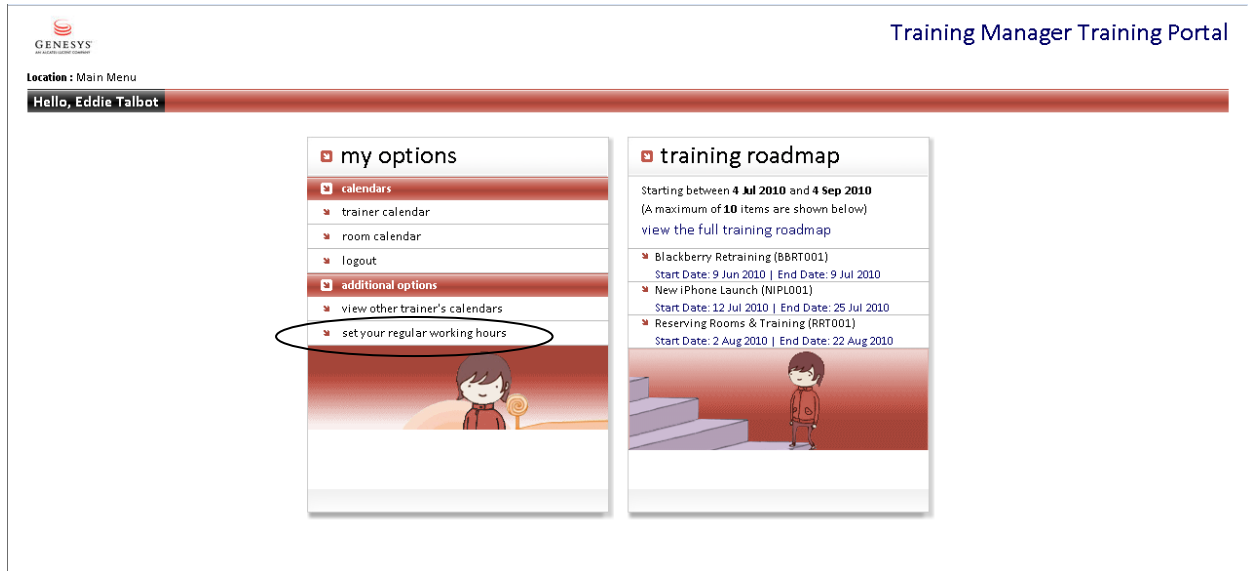
Training Plan: Training Plan 1 Trainer: David Hill

Training Plan Event: Event 1 Attendees Listed Below:

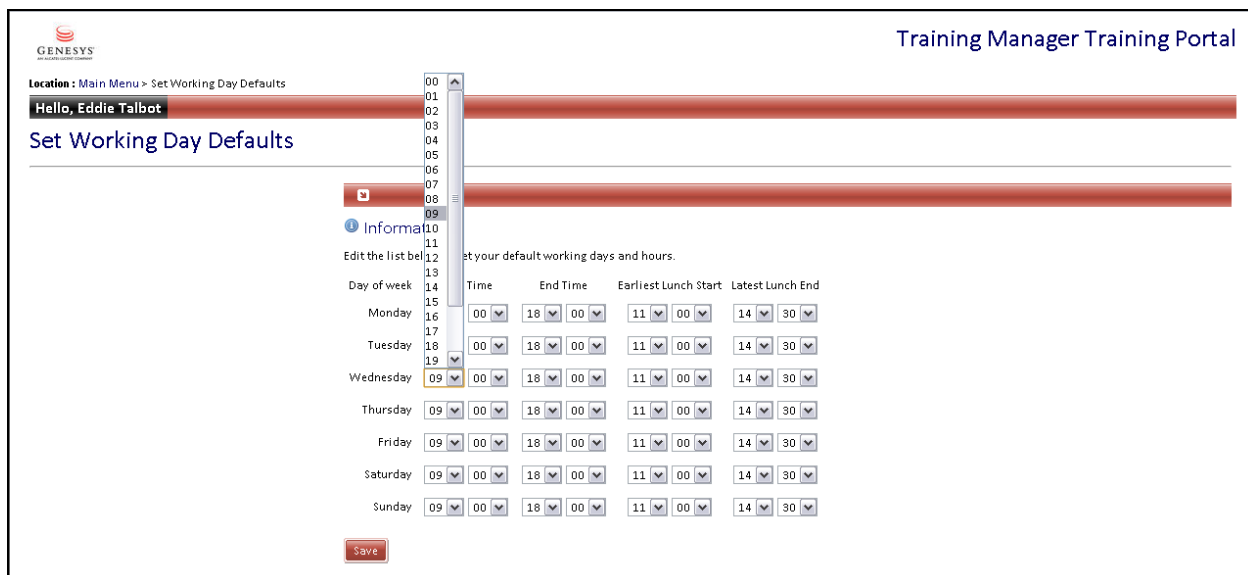
Details

## Set Your Regular Working Hours

Trainer working hours are kept up to date in Training Manager by selecting 'set your regular working hours'. This may not be necessary for the Trainer Manager if they will not be scheduled to deliver any training.



The current default hours that Training Manager will use for scheduling will then be presented. If any amendments have to be made, use the drop down list to select the correct times against the appropriate day. This option should not be used for excluding dates and times due to holidays as these are entered as per the instructions in the Trainer Calendar section. The hours entered are then immediately updated in Training Manager and are visible against the trainer.



## Training Roadmap

Select 'view the training roadmap' from the home page (the latest scheduled training will be visible on the home page under training roadmap).

The screenshot displays the 'Training Manager Training Portal' interface. At the top left is the GENESYS logo. Below it, the text 'Location: Main Menu' and 'Hello, Eddie Talbot' are visible. The main content area is divided into two columns. The left column, titled 'my options', contains a list of links: 'calendars' (with a sub-link 'trainer calendar'), 'room calendar', 'logout', 'additional options' (with sub-links 'view other trainer's calendars' and 'set your regular working hours'), and a cartoon character holding a medal. The right column, titled 'training roadmap', shows a list of training events. A red oval highlights the link 'view the full training roadmap' in the 'training roadmap' section. A bracket on the right side of the 'training roadmap' section indicates that the list of events is scrollable. The events listed are: 'Blackberry Retraining (BBRT001)' (Start Date: 9 Jun 2010 | End Date: 9 Jul 2010), 'New iPhone Launch (NIPL001)' (Start Date: 12 Jul 2010 | End Date: 25 Jul 2010), and 'Reserving Rooms & Training (RRT001)' (Start Date: 2 Aug 2010 | End Date: 22 Aug 2010). The 'training roadmap' section also includes a cartoon character standing on a set of stairs.

GENESYS  
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Location: Main Menu  
Hello, Eddie Talbot

Training Manager Training Portal

**my options**

- calendars
  - trainer calendar
- room calendar
- logout
- additional options
  - view other trainer's calendars
  - set your regular working hours

**training roadmap**

Starting between **4 Jul 2010** and **4 Sep 2010**  
(A maximum of **10** items are shown below)

[view the full training roadmap](#)

- Blackberry Retraining (BBRT001)  
Start Date: 9 Jun 2010 | End Date: 9 Jul 2010
- New iPhone Launch (NIPL001)  
Start Date: 12 Jul 2010 | End Date: 25 Jul 2010
- Reserving Rooms & Training (RRT001)  
Start Date: 2 Aug 2010 | End Date: 22 Aug 2010

The training is color coded based on the status indicators.

GENESYS  
AN ACQUISITION COMPANY

Training Manager Training Portal

Location: Main Menu > Training Roadmap

Hello, Eddie Talbot

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.

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Training Manager Training Portal

Location: Main Menu > Training Roadmap

Hello, Eddie Talbot

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
<b>Objectives</b> Supporting training based on skill gaps identified	
<b>Additional Notes</b> This training is required across all areas impacted by the scheduled marketing activity	
New iPhone Launch (NIPL001)	Start Date: Monday, 12 July 2010
Reserving Rooms & Training (RRT001)	Start Date: Monday, 2 August 2010