



## **Genesys Training Manager 8.0**

# Web Portal Administrator Guide

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Alcatel-Lucent's Genesys solutions feature leading software that manages customer interactions over phone, Web, and mobile devices. The Genesys software suite handles customer conversations across multiple channels and resources—self-service, assisted-service, and proactive outreach—fulfilling customer requests and optimizing customer care goals while efficiently using resources. Genesys software directs more than 100 million customer interactions every day for 4000 companies and government agencies in 80 countries. These companies and agencies leverage their entire organization, from the contact center to the back office, while dynamically engaging their customers. Visit [www.genesyslab.com](http://www.genesyslab.com) for more information.

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 Administrator Guide*. This guide is designed to explain the application in user friendly terms and describe 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, 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, enabling visibility of the scheduled training and meeting activity, together with any other details available. For example, it may include a reason for the training, identify the room and trainer, and describe any pre-requisite work, if required.

The trainer updates attendance through an online attendance register, which is accessed directly through the web portal. This automatically updates the Training Manager with a description of who has attended, and any non-attendees can be identified and "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	Document titles Emphasis Definitions of (or first references to) unfamiliar terms Mathematical 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).	Please consult the <i>Genesys Migration Guide</i> for more information.  Do <i>not</i> use this value for this option.  <i>A customary and usual practice</i> is one that is widely accepted and used within a particular industry or profession.  The formula, $x + 1 = 7$ where $x$ stands for . . .
Monospace font (Looks like teletype or typewriter text)	All programming identifiers and GUI elements. This convention includes:  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.	Select the Show <code>variables</code> on screen check box.  In the <code>Operand</code> text box, enter your formula.  Click <code>OK</code> to exit the <code>Properties</code> dialog box.  T-Server distributes the error messages in <code>EventError</code> events.  If you select <code>true</code> for the <code>inbound-bsns-calls</code> option, all established inbound calls on a local agent are considered business calls.

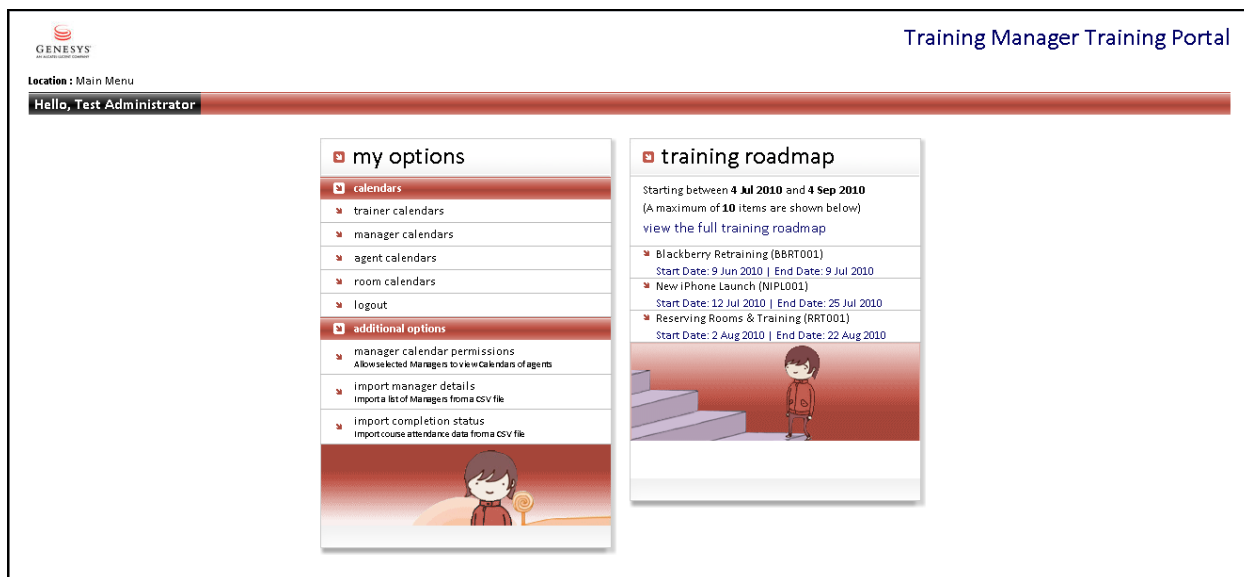


	<p>Code samples.</p> <p>Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.</p>	Enter <code>exit</code> on the command line.
Angle brackets (<>)	<p>A placeholder for a value that the user must specify. This might be a DN or a port 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>	<code>smcp_server -host &lt;confighost&gt;</code>

# 2 Web Portal Administrator

## The Administrator

When the administrator logs on to the system they are presented with a screen similar to the example below:



The administrator has full read only access to the portal to view the following:

- trainer calendars
- manager calendars

- agent calendars
- room calendars

There is also additional administrator functionality:

- manager calendar permissions
- import manager details
- import completion status data

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

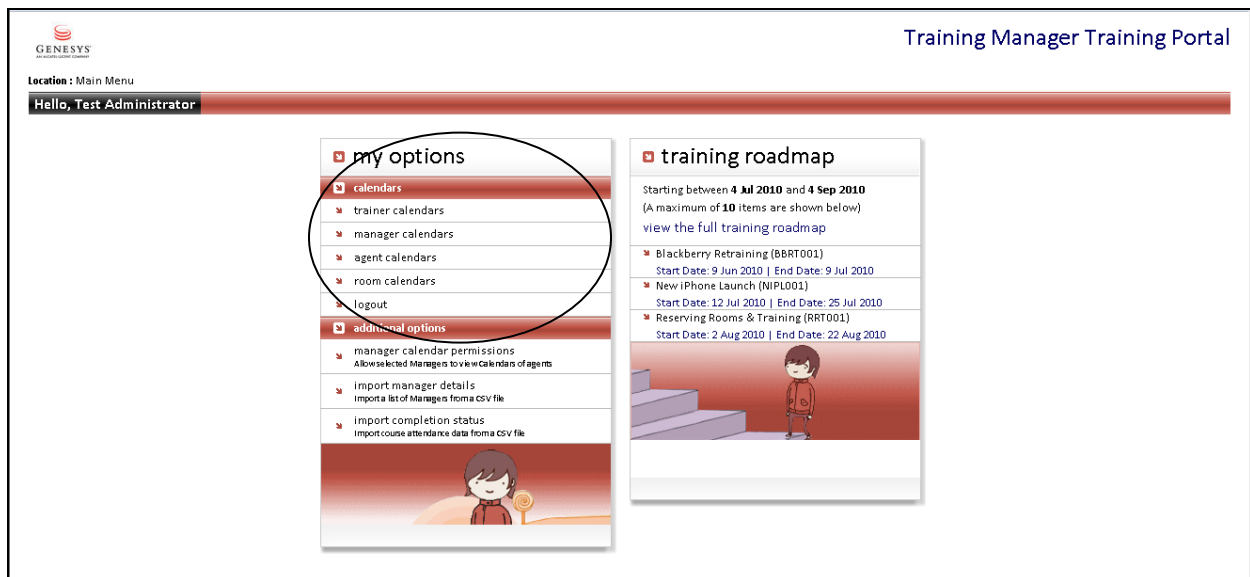
Training details are visible in the portal after training sessions have been created in Training Manager.

# My Options

In the top left hand window, the administrator has access to:

- Trainer Calendar
- Manager Calendars
- Agent Calendar
- Room Calendar

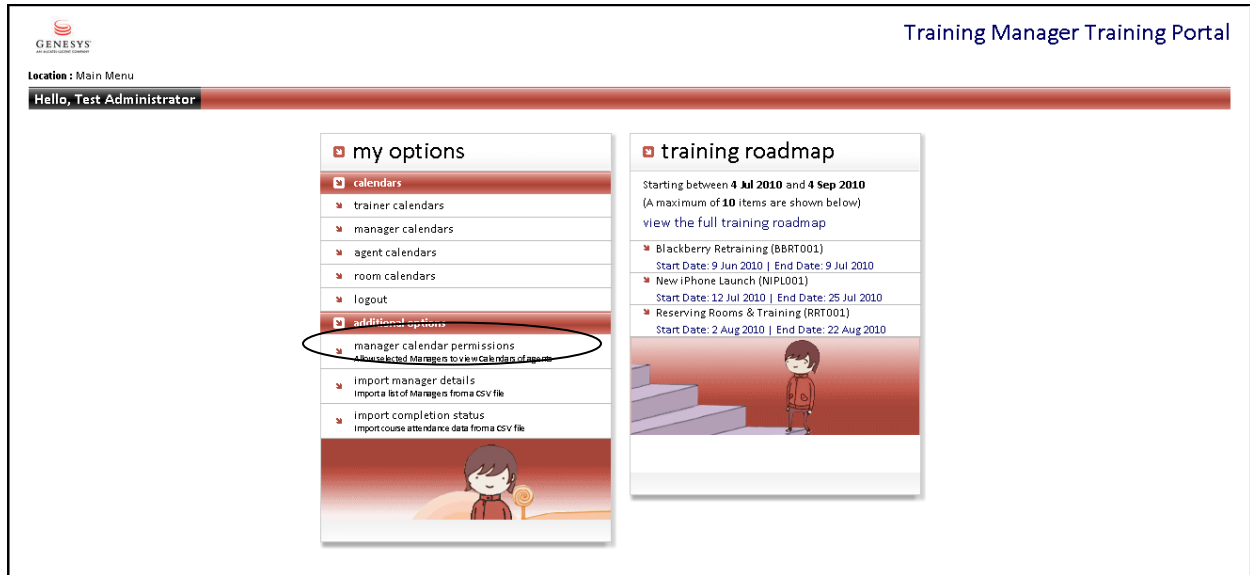
Please refer to the individual Administration Guides for information on the above functionality.



## Manager Calendar Permissions

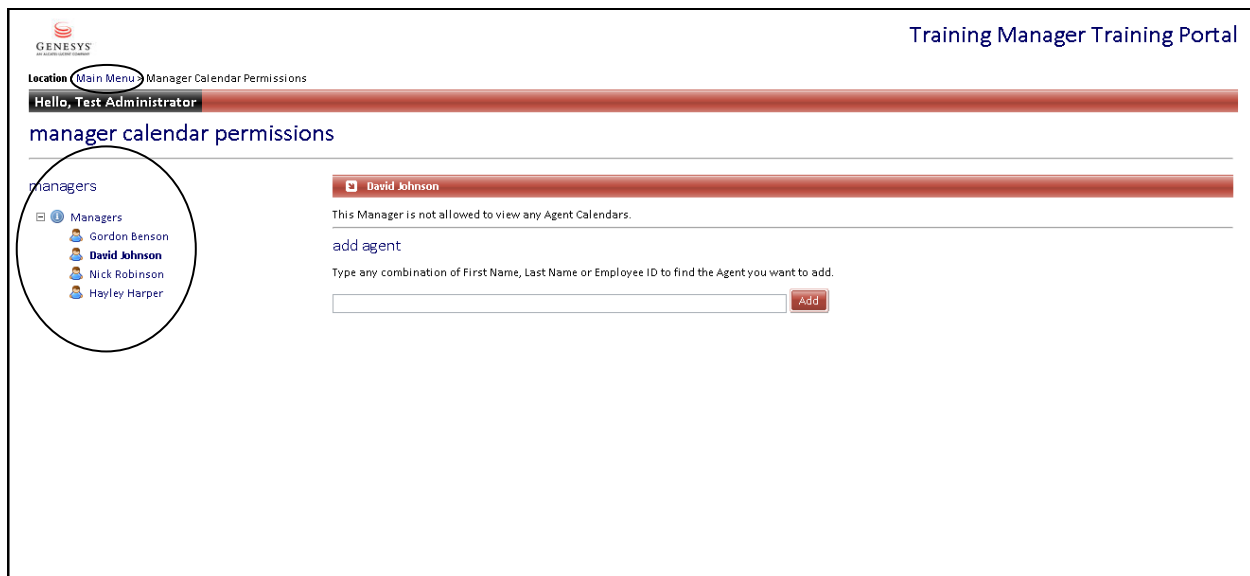
Line managers can manually be configured to give them access to their agents' diaries.

Select 'manager calendar permissions' from the home page.



After selecting the 'manager calendar permissions' option, a screen similar to the example below is presented. Any managers already configured in Genesys Training Manager will appear at the left hand side of the window.

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



By associating agents to managers, using this option will give the manager visibility of their agents' calendars.

Select the manager from the list at the left hand side and then by entering information in the “add agents’ box a list of possible agent s will be presented to select from.

By entering the information in the search box, this will filter the available agents for selection.

GENESYS  
AN AVAYA COMPANY

Training Manager Training Portal

Location: Main Menu > Manager Calendar Permissions

Hello, Test Administrator

### manager calendar permissions

managers

- Managers
- Gordon Benson
- David Johnson**
- Nick Robinson
- Hayley Harper

**David Johnson**

This Manager is not allowed to view any Agent Calendars.

add agent

Type any combination of First Name, Last Name or Employee ID to find the Agent you want to add.

a

- U\_8250\_Simulator: Abel Penunuri
- U\_8344\_Simulator: Adam Torres
- U\_8358\_Simulator: Alex Wang
- U\_8361\_Simulator: Alexandra Washington
- U\_8310\_Simulator: Alison Smith
- U\_8306\_Simulator: Amy Jay
- U\_8349\_Simulator: Amy Reicher
- U\_8277\_Simulator: Andrea Rivera
- U\_7004\_Simulator: Andrew Faust
- U\_8276\_Simulator: Andrew Thomas
- FD\_Voice\_Agent: Andrew Walker
- U\_8342\_Simulator: Angela Thomas

Add

Agents can then be selected for associating to the manager.

After identifying the required agent, select 'Add'.

GENESYS  
AN AVAYA COMPANY

Training Manager Training Portal

Location: Main Menu > Manager Calendar Permissions

Hello, Test Administrator

### manager calendar permissions

managers

- Managers
- Gordon Benson
- David Johnson**
- Nick Robinson
- Hayley Harper

**David Johnson**

This Manager is not allowed to view any Agent Calendars.


add agent

Type any combination of First Name, Last Name or Employee ID to find the Agent you want to add.

U\_8276\_Simulator: Andrew Thomas

Add

The agent selected is then associated to the manager. Continue associating other agents as required.

**GENESYS**  
AN ACADIA COMPANY

Training Manager Training Portal

Location : Main Menu > Manager Calendar Permissions

Hello, Test Administrator

manager calendar permissions

managers

Managers

Gordon Benson

**David Johnson**

Nick Robinson

Hayley Harper


David Johnson

Employee ID	First Name	Last Name
U_8276_Simulator	Andrew	Thomas

add agent

Type any combination of First Name, Last Name or Employee ID to find the Agent you want to add.

Add

**GENESYS**  
AN ACADIA COMPANY

Training Manager Training Portal

Location : Main Menu > Manager Calendar Permissions

Hello, Test Administrator

manager calendar permissions

managers

Managers

Gordon Benson

**David Johnson**

Nick Robinson

Hayley Harper

David Johnson

Employee ID	First Name	Last Name
U_8276_Simulator	Andrew	Thomas
U_8278_Simulator	Jaime	Severiano

add agent

Type any combination of First Name, Last Name or Employee ID to find the Agent you want to add.

Add

Where an agent is incorrectly shown against a manager, the agent can be removed.

The screenshot shows the 'Training Manager Training Portal' interface. At the top, the Genesys logo is on the left, and the portal name is on the right. Below the logo, the location path is 'Main Menu > Manager Calendar Permissions'. A greeting bar says 'Hello, Test Administrator'. The main heading is 'manager calendar permissions'. On the left, under 'managers', a list shows 'Gordon Benson', 'David Johnson' (selected), 'Nick Robinson', and 'Hayley Harper'. The main content area shows a table for 'David Johnson' with columns 'Employee ID', 'First Name', and 'Last Name'. Two agents are listed: 'U\_8276\_Simulator' (Andrew Thomas) and 'U\_8278\_Simulator' (Jaime Severiano). Both have a red 'X' icon in the 'Last Name' column. A callout box with an arrow points to the 'X' for 'U\_8278\_Simulator', with the text 'Click on the X to disassociate the agent'. Below the table is an 'add agent' section with a text input field and an 'Add' button.

GENESYS  
AN AGENTWORKS COMPANY

Training Manager Training Portal

Location : Main Menu > Manager Calendar Permissions

Hello, Test Administrator

### manager calendar permissions

managers

- Managers
  - Gordon Benson
  - David Johnson**
  - Nick Robinson
  - Hayley Harper

Employee ID	First Name	Last Name
U_8276_Simulator	Andrew	Thomas
U_8278_Simulator	Jaime	Severiano

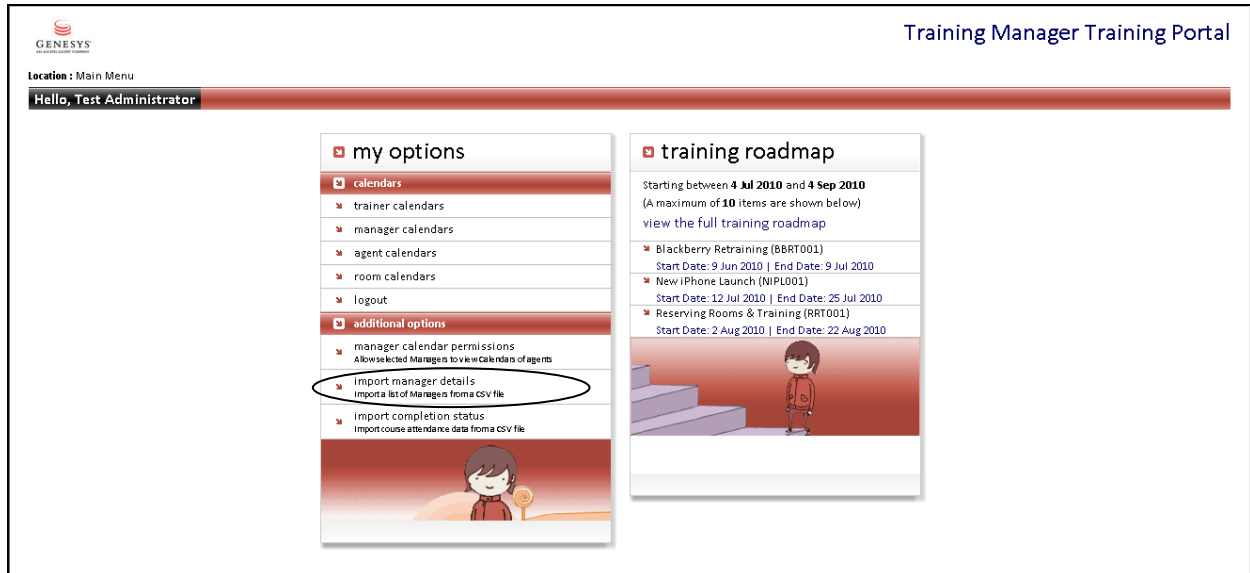
[add agent](#)

Type any combination of First Name, Last Name or Employee ID to find the Agent you want to add.



## Import Manager Details

Maintaining the manager hierarchy can be done by uploaded hierarchy information through the 'import manager details' option.



After selecting 'import manager details' the following screen is presented for importing csv files.


Select 'Choose File' to browse for the relevant file to import.

---

**Note:** The file **MUST** be in the format specified for the import to work correctly. Once the import has been completed, any anomalies will be reported.

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An example of the csv file format is given on the next page.

**GENESYS**  
AN ACADIA GROUP COMPANY

Training Manager Training Portal

Location: Main Menu > Import Managers

Hello, Test Administrator

## Import Managers

**Note**

The CSV file containing your manager data should contain 4 columns as specified below:

ManagerID,FirstName,LastName,ReportID

The first row must contain these headings otherwise your file will not be imported.

Information

Select the CSV file containing your manager details:

Choose File

No file chosen

Upload

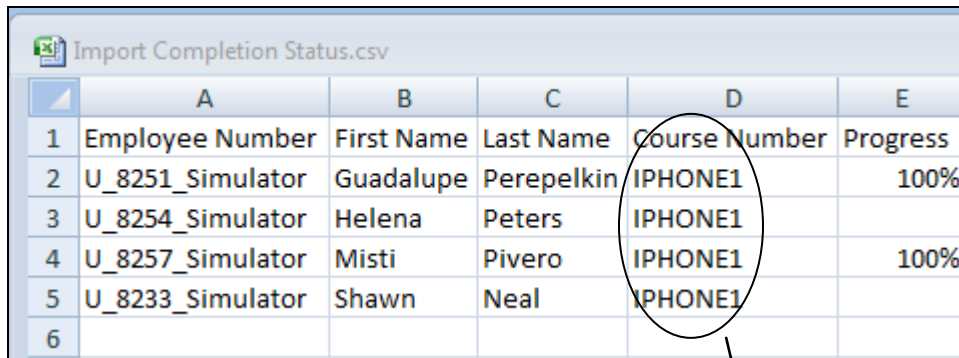
The example below is the format that the csv file must be in.

- ManagerID
- Managers First Name
- Managers Last Name
- Agent ID

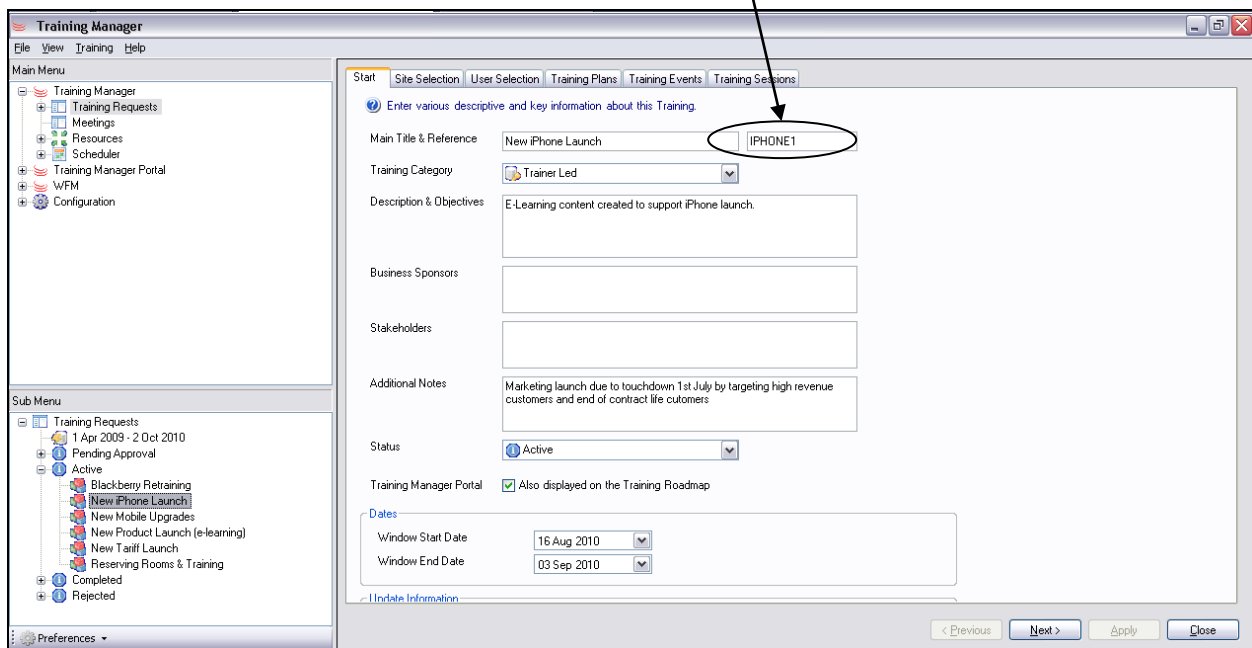
Imports Managers.csv				
	A	B	C	D
1	ManagerID	FirstName	LastName	ReportID
2	423623	Amanda	Ballard	U_8306_Simulator
3	423623	Amanda	Ballard	U_7004_Simulator
4	423623	Amanda	Ballard	U_8224_Simulator
5	423623	Amanda	Ballard	U_8232_Simulator
6	423623	Amanda	Ballard	U_8227_Simulator
7	423623	Amanda	Ballard	U_7002_Simulator
8	423623	Amanda	Ballard	U_8329_Simulator
9	423623	Amanda	Ballard	U_8353_Simulator
10	423623	Amanda	Ballard	12345
11	423623	Amanda	Ballard	U_8322_Simulator
12	423623	Amanda	Ballard	HDunn
13	423623	Amanda	Ballard	U_6008_Simulator
14	128744	Bob	Hoskins	U_8330_Simulator
15	128744	Bob	Hoskins	U_8225_Simulator
16	128744	Bob	Hoskins	U_8223_Simulator
17	128744	Bob	Hoskins	KLewis
18	128744	Bob	Hoskins	U_7005_Simulator
19	128744	Bob	Hoskins	U_8332_Simulator
20	128744	Bob	Hoskins	U_8304_Simulator
21	128744	Bob	Hoskins	U_8307_Simulator
22	128744	Bob	Hoskins	U_8331_Simulator
23	128744	Bob	Hoskins	Terry
24	128744	Bob	Hoskins	U_8292_Simulator
25	128744	Bob	Hoskins	U_6007_Simulator
26	482931	Christine	Dixon	U_6006_Simulator
27	482931	Christine	Dixon	U_7001_Simulator
28	482931	Christine	Dixon	U_8326_Simulator

## Import Completion Status Data

To update the completion status for scheduled e-learning (if there is no direct integration into the LMS) can be done by importing the data via a csv file. Below is an example of a csv file which has been exported from an LMS. The Course Number must match the Course Code in the Training Manager Training Request for this to work correctly.



	A	B	C	D	E
1	Employee Number	First Name	Last Name	Course Number	Progress
2	U_8251_Simulator	Guadalupe	Perepelkin	IPHONE1	100%
3	U_8254_Simulator	Helena	Peters	IPHONE1	
4	U_8257_Simulator	Misti	Pivero	IPHONE1	100%
5	U_8233_Simulator	Shawn	Neal	IPHONE1	
6					



Training Manager

File View Training Help

Main Menu

- Training Manager
- Training Requests
- Meetings
- Resources
- Scheduler
- Training Manager Portal
- WFM
- Configuration

Sub Menu

- Training Requests
  - 1 Apr 2009 - 2 Oct 2010
  - Pending Approval
  - Active
    - Blackberry Retraining
    - New iPhone Launch
    - New Mobile Upgrades
    - New Product Launch (e-learning)
    - New Tariff Launch
    - Reserving Rooms & Training
  - Completed
  - Rejected

Preferences

Start Site Selection User Selection Training Plans Training Events Training Sessions

Enter various descriptive and key information about this Training.

Main Title & Reference: New iPhone Launch **IPHONE1**

Training Category: Trainer Led

Description & Objectives: E-Learning content created to support iPhone launch.

Business Sponsors:

Stakeholders:

Additional Notes: Marketing launch due to touchdown 1st July by targeting high revenue customers and end of contract life customers

Status: Active

Training Manager Portal: ☒ Also displayed on the Training Roadmap

Dates

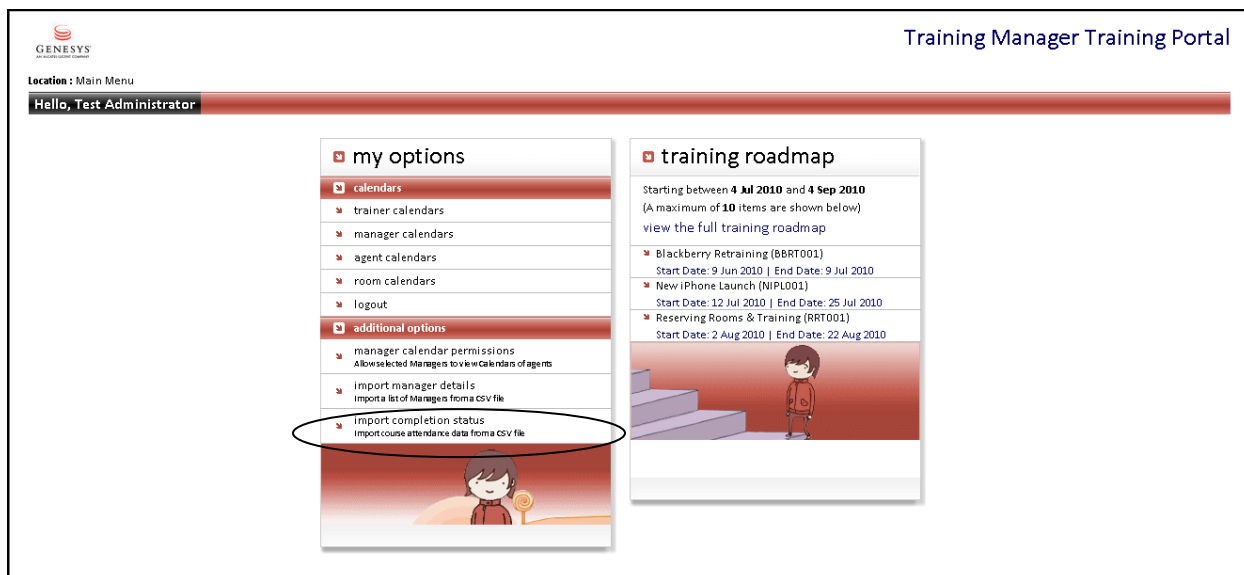
Window Start Date: 16 Aug 2010

Window End Date: 03 Sep 2010

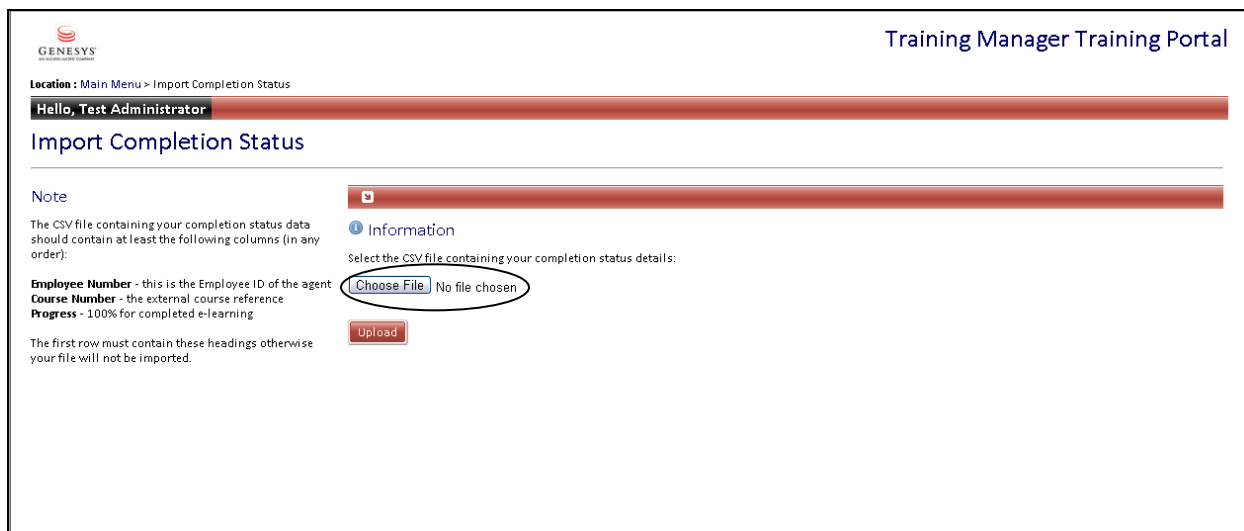
Update Information

< Previous Next > Apply Close

Select 'import completion status data' to import the spreadsheet.

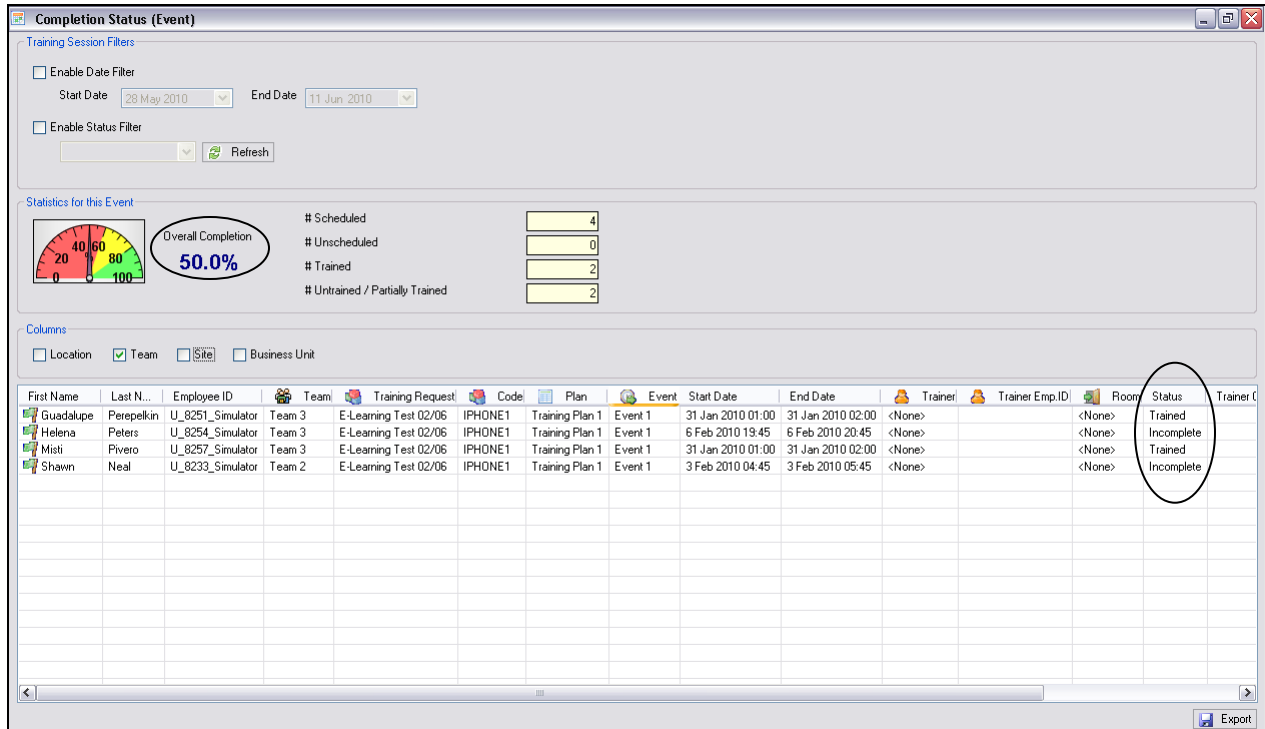


Select the 'Choose File' option to browse for the correct file to import. The data must be in the correct format for the import to work successfully.



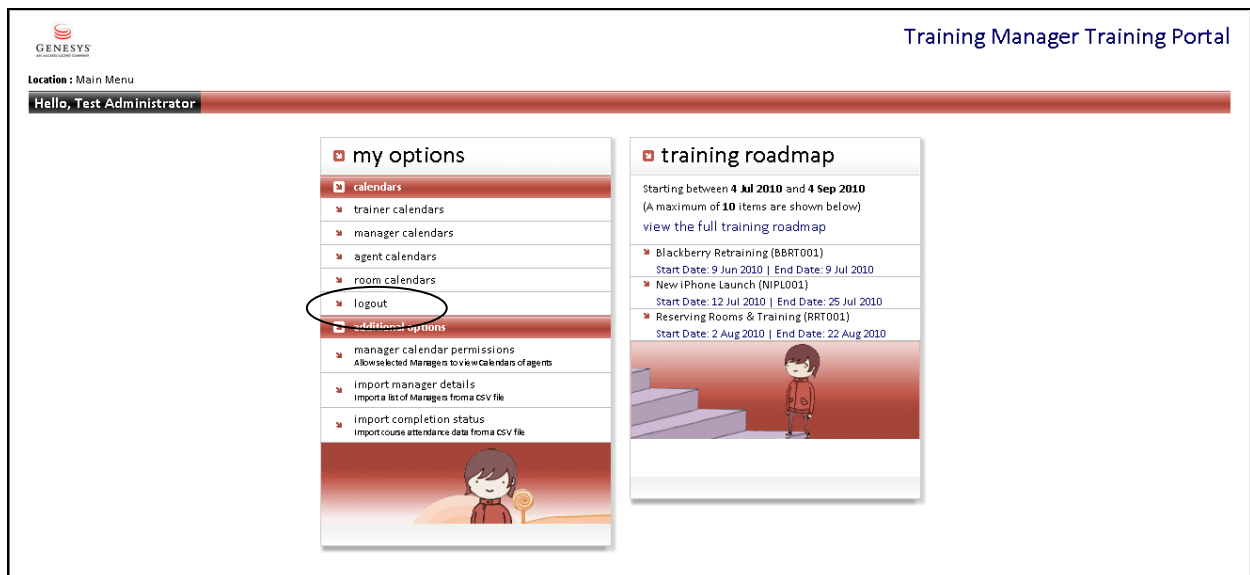
Select 'Upload' once the file has been selected.

Training Manager is then updated with the completion information automatically from the imported report as per the example below.



## Log Out

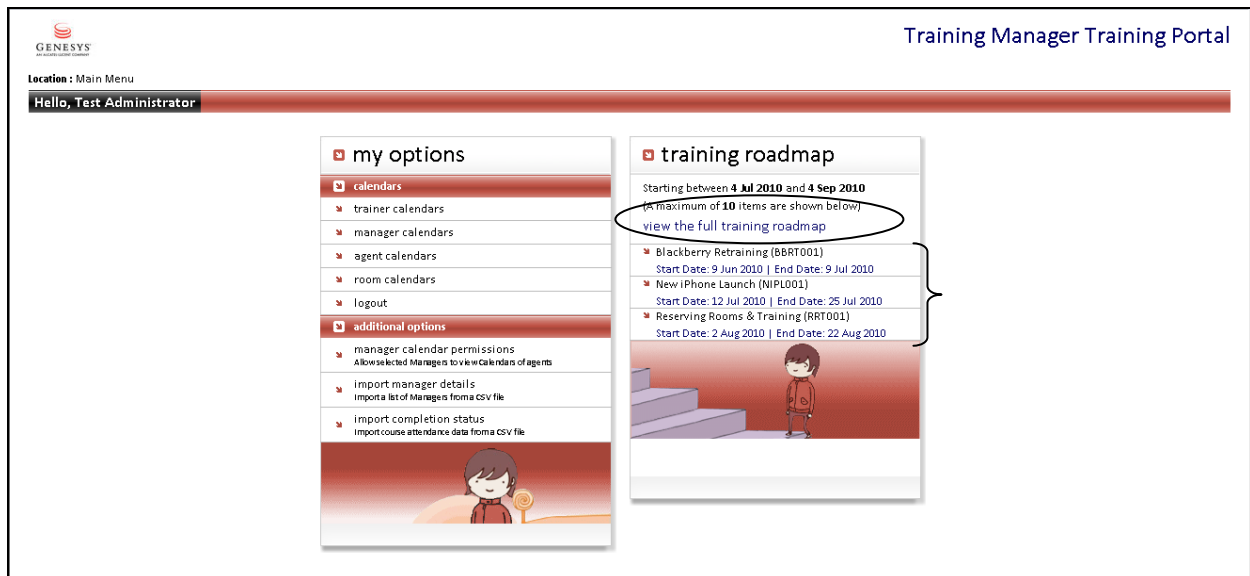
The option to logout is available on the front page.



## Training Roadmap

The training roadmap is displayed in the right hand window and the latest training activity is visible in the training roadmap window.

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



The training is color-coded based on the status indicators.

Click on the training session to reveal any additional details, for example, Objectives, Additional Notes.

The training sessions can also be filtered using the 'sort by' pull down box.

The screenshot displays the 'Training Manager Training Portal' interface. At the top, the Genesys logo and 'AN ASSOCIATED COMPANY' are visible. The page title is 'Training Manager Training Portal'. Below the header, the location is 'Main Menu > Training Roadmap' and the user is 'Hello, Test Administrator'. The main section is titled 'training roadmap'. A yellow banner indicates 'Required fields are all shaded in this colour'. A filter key on the left lists three status categories: 'Unscheduled' (red icon), 'scheduled' (green icon), and 'completed' (blue icon). A bracket groups the 'Unscheduled' and 'scheduled' categories. The main content area shows three training sessions: 'Blackberry Retraining (BBRT001)' (red bar), 'New iPhone Launch (NIPL001)' (green bar), and 'Reserving Rooms & Training (RRT001)' (red bar). Each session includes a start date and details. A filter bar at the top right allows for date selection (Start Date: 04 July 2010, End Date: 04 September 2010) and a 'Sort By' pull-down menu (set to 'Date') with a 'Go' button. The 'Sort By' menu is circled in the image.

GENESYS  
AN ASSOCIATED COMPANY

Training Manager Training Portal

Location : Main Menu > Training Roadmap

Hello, Test Administrator

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

Objectives  
E-Learning content created to support iPhone launch.

Additional Notes  
Marketing launch due to touchdown 1st July by targeting high revenue customers and end of contract life customers

Reserving Rooms & Training (RRT001) Start Date: Monday, 2 August 2010