



## **Genesys Training Manager 8.1.1**

# Web Portal Trainer 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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## Preface

Welcome to the *Genesys Training Manager Web Portal Trainer Manager Guide*. This guide is designed to explain the application in user-friendly terms and walk you 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 <a href="mailto:orderman@genesyslab.com">orderman@genesyslab.com</a> .
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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 8](#).

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## About Genesys Training Manager

Genesys Training Manager enables companies to create, manage, and schedule multiple agent training activities, team meetings, and one-to-ones automatically in Genesys WorkForce Management (WFM). The training scheduling process can include rooms and trainers, or any combination of agent, room, and training. Team meetings and one-to-ones automatically include the manager.

A browser-based Web portal is included as part of the application, allowing visibility into the scheduled training and meeting activity, together with any other available details—for example, the reason for the training, the room, the trainer, and any pretraining work if required. Trainers update attendance through their online attendance register, which they access directly through their Web portal. This automatically updates Training Manager with the attendees, and if there were any non-attendees, these can be "mopped up" automatically as part of the scheduling process.

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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, see the [Contact Information](#) on the Tech Support website. Before contacting technical support, refer to the [Genesys Technical Support Guide](#) 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).

## 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"> <li>• Document titles</li> <li>• Emphasis</li> <li>• Definitions of (or first references to) unfamiliar terms</li> </ul>	<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>

	<ul style="list-style-type: none"> <li>Mathematical variables</li> </ul>	<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>
<p>Monospace font (Looks like teletype or typewriter text)</p>	<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> <p>Also used for any text that users must manually enter during a configuration or installation procedure.</p>	<p>Select the Show <i>variables</i> on screen check box.</p> <p>In the Operand text box, enter your formula.</p> <p>Click OK to exit the <i>Properties</i> dialog box.</p> <p>T-Server distributes the error messages in <i>EventError</i> events.</p> <p>If you select <i>true</i> for the <i>inbound-bsns-calls</i> option, all established inbound calls on a local agent are considered business calls.</p> <p>Enter <i>exit</i> on the command line.</p>
<p>Angle brackets (&lt;&gt;)</p>	<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>





# Web Portal Trainer Manager

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## The Trainer Manager

When the trainer manager logs on to the system, he or she is presented with a home page view similar to the following example.

The trainer manager has access to:

- trainer calendar
- view other trainer's calendars
- room calendar
- set your regular working hours
- change your time zone
- training roadmap

Depending on how the webportal is accessed a login may be required.

The screenshot shows the Genesys Training Manager Portal login interface. At the top left is the Genesys logo and the text 'Location : Login'. At the top right is the title 'Genesys Training Manager Portal'. Below the title is a red horizontal bar. The main content area starts with a 'Welcome' message and the instruction 'To login, enter your User Name and Password below'. A blue information icon indicates 'These details are case-sensitive'. Below this is a form titled 'Enter Your Details' with input fields for 'User Name' and 'Password', and a red 'Continue' button. At the bottom, a red warning icon is followed by the text 'Trouble logging in?' and a paragraph explaining that the site uses cookies and providing instructions on how to resolve login issues if the browser cannot accept cookies.

Genesys Training Manager Portal 8.1.1

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When logging in for the first time, a time zone must be selected from the drop down box. This will ensure that any scheduled training activity is recorded in the correct working time zone. If the wrong time zone has been selected, or the configuration is incorrect in Training Manager, then training sessions will show incorrect times. Select **Continue** to either access the Home page or login.

The option to change the time zone in the future is available on the home page under settings.

Genesys

Training Manager Training Portal

Location: Main Menu > Change Time Zone

Rachel O'Neill - [rachel] Logout

### Choose Your Time Zone

Please choose your Time Zone from the list below. This will enable all dates and times to be displayed in your local time.

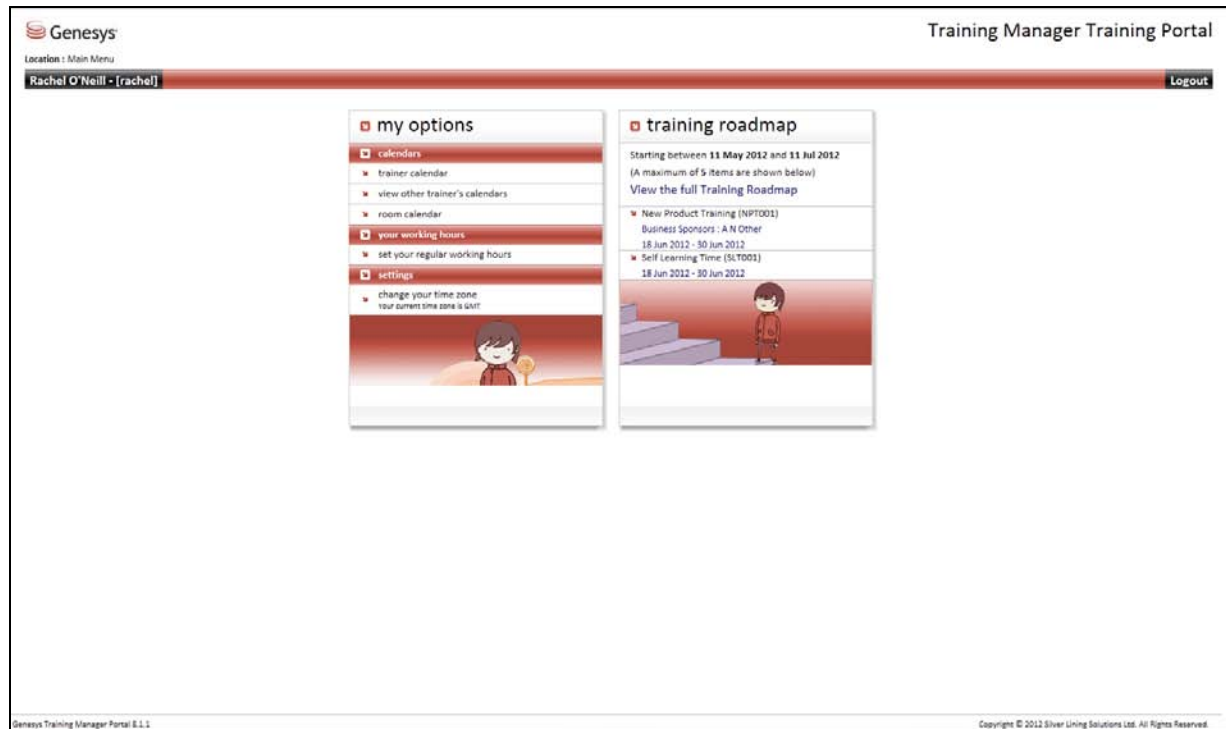
GMT Continue

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The home page is separated into two sections, my options in the left pane and training roadmap in the right pane.

The option to log out is available in the top-right corner of each screen.

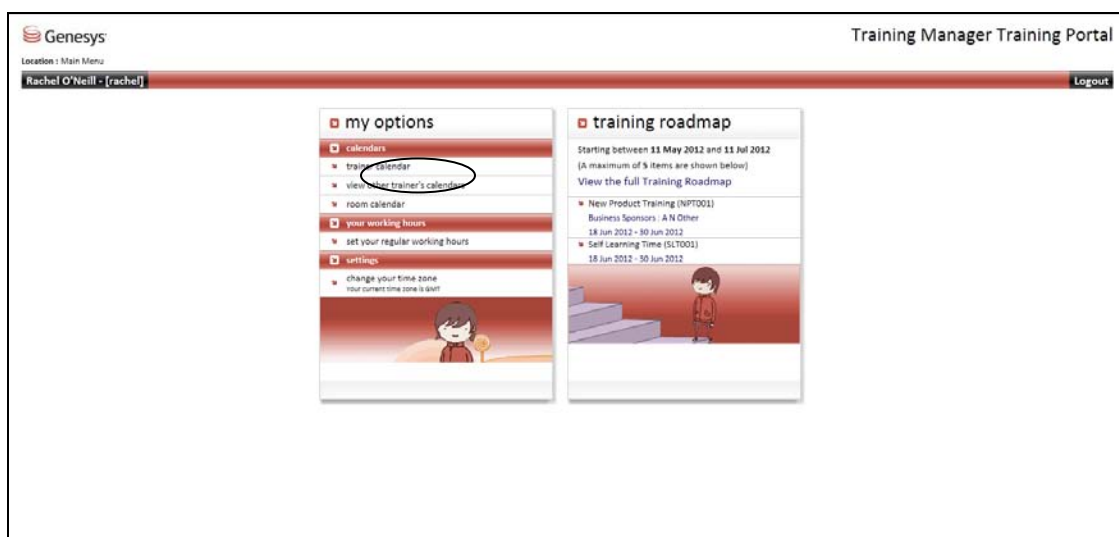
Training details will only be visible in the portal if training sessions have been scheduled and approved.



## My Options

### Trainer Calendar

Clicking trainer calendar will present the trainer calendar view, and by default, the Standard View tab is displayed.



There are four options available for the trainer manager to view the trainers who report to him or her, and the scheduled training activity of those trainers:

- View by Location
- View by Home Location
- View by Alphabetical Order
- View by Hierarchy

View by Location presents the locations in the bottom-left corner of the screen. Expand the location to view the associated trainers.

Select a trainer to view his or her calendar, modify the date range as required, and then click Go.

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

The screenshot shows the Genesys Training Manager Training Portal. The user is Rachel O'Neill. The calendar is set to Standard View. The left sidebar shows a legend for event status: Scheduled (green), Completed (blue), and Other (yellow). The calendar displays events for Daniel Oliver, including scheduled training sessions and holidays. A callout box points to Daniel Oliver in the trainer selection list, indicating he is selected.

The status of the training activity is color-coded, as explained in the key on the left side of the screen:

- **Scheduled** – The training is partially or fully scheduled, and the agents will have this training scheduled in Genesys WFM.
- **Completed** – The training has been completed, and this activity is listed for information only.
- **Other** – This is for an 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 view any trainers who report to him or her.

Expanding the hierarchy and selecting the required trainer together with the relevant date range will reveal any scheduled training activity. The trainer manager can also view his or her own activity by selecting himself or herself and the relevant date range.

Genesys Training Manager Training Portal

Location: Main Menu > Trainer Calendar

Rachel O'Neill - [rachel] Logout

trainer calendar

Required fields

Legend

- Scheduled
- Completed
- Other

trainer selection

- View by Location
- View by Home Location
- View by Hierarchical Order
- View by Hierarchy

Select All | Unselect All

Hierarchy

- Rachel O'Neill [rachel]
- Daniel Oliver [daniel]

Standard View Planner View

Search

Start Date 28 May 2012 End Date 25 Jun 2012 Sort By Trainer Go

Go to Advanced Search

Daniel Oliver

Monday, 11 June 2012

08:30 - 17:00 GMT (Daylight Savings) Holiday

Tuesday, 12 June 2012

08:30 - 17:00 GMT (Daylight Savings) Holiday

Thursday, 21 June 2012

11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Friday, 22 June 2012

11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Monday, 25 June 2012

11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

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

Genesys Training Manager Training Portal

Location: Main Menu > Trainer Calendar

Rachel O'Neill - [rachel] Logout

trainer calendar

Required fields

Legend

- Scheduled
- Completed
- Other

trainer selection

- View by Location
- View by Home Location
- View by Hierarchical Order
- View by Hierarchy

Select All | Unselect All

Hierarchy

- Rachel O'Neill [rachel]
- Daniel Oliver [daniel]

Standard View Planner View

Search

Start Date 28 May 2012 End Date 25 Jun 2012 Sort By Trainer Go

Go to Advanced Search

Daniel Oliver

Monday, 11 June 2012

08:30 - 17:00 GMT (Daylight Savings) Holiday

Tuesday, 12 June 2012

08:30 - 17:00 GMT (Daylight Savings) Holiday

Thursday, 21 June 2012

11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Friday, 22 June 2012

11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Monday, 25 June 2012

11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Click on the bar to reveal the training detail

Training Request: New Product Training (NPT001) Trainer: Daniel Oliver

Training Event: Event 1 Room: Manchester Room 1

Employee ID	First Name	Last Name
U_8307_Simulator	Mary	Gail
U_8292_Simulator	Pele	Lolani
U_8246_Simulator	Rachel	Padaver

Attendance Register

No Attendance/Completion Recorded

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## Calendar Report View

There is also the option to view any trainer activity in a calendar format by clicking the Planner View tab, as shown in the following example.

The details can be viewed by day, week, or month by selecting the relevant option.

The planner view gives the trainer manager a high-level view of his or her trainers' training activity, and the activities are color-coded for easy visibility.

In this example, one trainer has been selected.

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

The screenshot displays the Genesys Training Manager Training Portal. The top navigation bar shows the location as 'Main Menu > Trainer Calendar' and the user as 'Rachel O'Neill - [rachel]' with a 'Logout' button. The 'trainer calendar' section includes a 'Required fields' warning and a 'Legend' with categories: 'No Category' (grey), 'Holiday' (orange), and 'Training Session' (green). The 'trainer selection' section shows options to view by location, home location, alphabetical order, or hierarchy, with a list of selected trainers: 'Rachel O'Neill [rachel]' and 'Daniel Oliver [daniel]'. The main calendar area is titled 'Daniel Oliver' and shows a monthly view for June 2012. A callout box points to the 'Open in new window' link, and another callout box points to the 'Click here to close this pop-out window' link.

To view in a separate window click on open in new window.

To close the separate window click on click here to close this pop out window

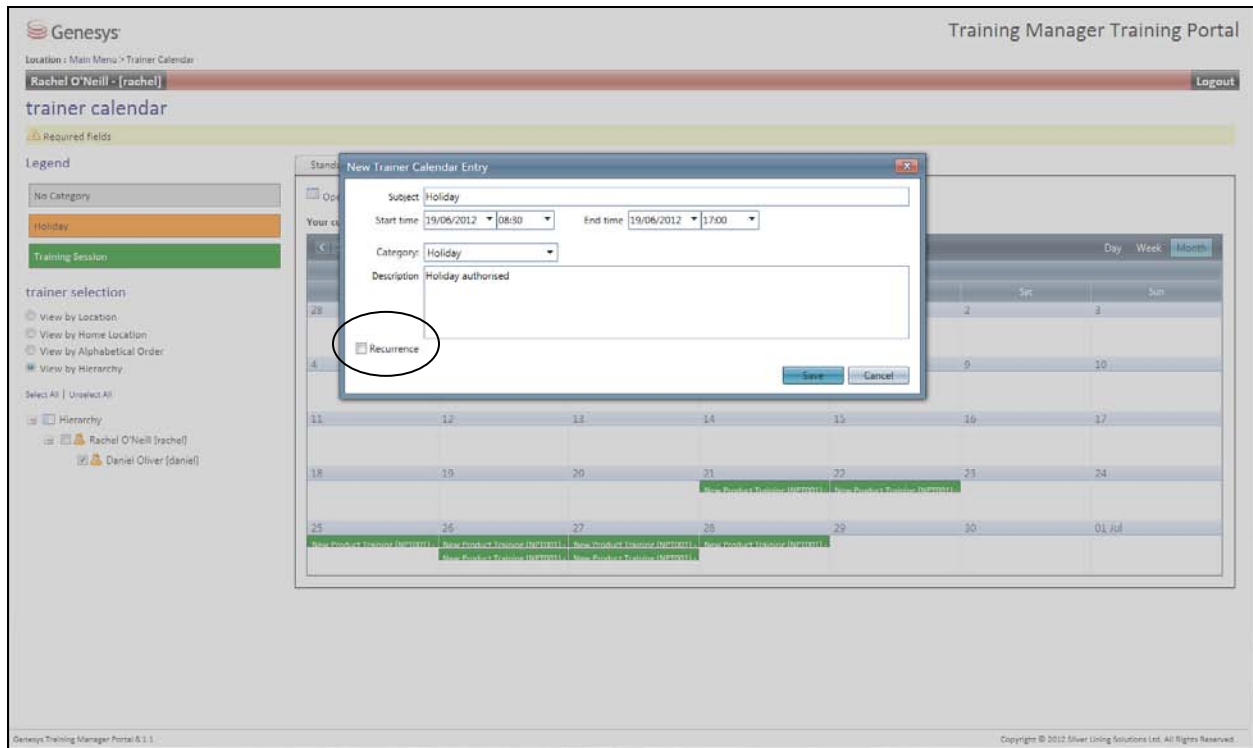


The trainer manager has access to insert non-availability time into trainers reporting into them.

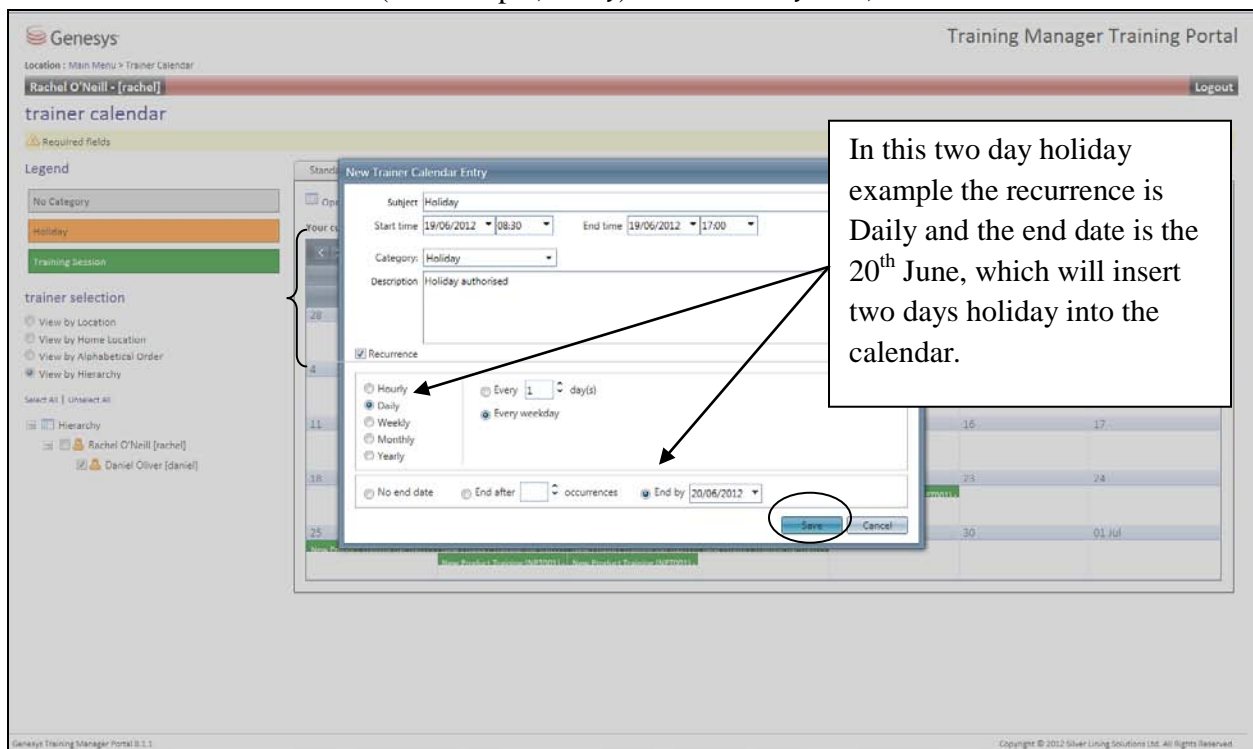
To insert non-availability time into a trainer's calendar, right-click in the calendar, and then select New entry.

The screenshot displays the Genesys Training Manager Training Portal. The main content area shows a calendar for June 2012, specifically for the trainer Daniel Oliver. The calendar is in 'Standard View' and shows dates from 28th May to 3rd July. A right-click context menu is open over the date 20th, with the 'New...' option highlighted. The left sidebar contains a 'trainer selection' section with a list of trainers: Rachel O'Neill (rachel) and Daniel Oliver (daniel). Daniel Oliver is selected. The top navigation bar includes the Genesys logo, the location path 'Main Menu > Trainer Calendar', the user name 'Rachel O'Neill - [rachel]', and a 'Logout' button. The footer of the page indicates 'Genesys Training Manager Portal 8.1.1' and 'Copyright © 2012 Silver lining Solutions Ltd. All Rights Reserved'.

The option is then available to select the required category from the drop-down list, and to specify the date and any details. If the event is for more than one consecutive day, the Recurrence option has to be used. This creates individual entries for each day in the Standard View tab.



Select the relevant recurrence (for example, Daily) and an End by date, and then click Save.



The scheduled activity will then be displayed on the Standard View tab as multiple day entries and in the Planner view.

Genesys Training Manager Training Portal

Location: Main Menu > Trainer Calendar

Rachel O'Neill - [rachel] Logout

### trainer calendar

Required fields

Legend

- No Category
- Holiday
- Training Session

trainer selection

- View by Location
- View by Home Location
- View by Alphabetical Order
- View by Hierarchy

Select All | Unselect All

Hierarchy

- Rachel O'Neill [rachel]
- Daniel Oliver [daniel]

Standard View Planner View

Open in new window Click here to Refresh

Your current time zone is GMT.

June 2012

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

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Genesys Training Manager Training Portal

Location: Main Menu > Trainer Calendar

Rachel O'Neill - [rachel] Logout

### trainer calendar

Required fields

Legend

- Scheduled
- Completed
- Other

Events partially or fully scheduled

Events no longer requiring action

Other calendar entries

trainer selection

- View by Location
- View by Home Location
- View by Alphabetical Order
- View by Hierarchy

Select All | Unselect All

Hierarchy

- Rachel O'Neill [rachel]
- Daniel Oliver [daniel]

Standard View Planner View

Search

Go to Advanced Search

Start Date 20 May 2012 End Date 25 Jun 2012 Sort By Trainer Go

Daniel Oliver

Monday, 11 June 2012

08:30 - 17:00 GMT (Daylight Savings) Holiday

Tuesday, 12 June 2012

08:30 - 17:00 GMT (Daylight Savings) Holiday

Tuesday, 19 June 2012

08:30 - 17:00 GMT (Daylight Savings) Holiday

Wednesday, 20 June 2012

08:30 - 17:00 GMT (Daylight Savings) Holiday

Thursday, 21 June 2012

11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 1 / Max. Seating: 6

Friday, 22 June 2012

11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Monday, 25 June 2012

13:00 - 13:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 1 / Max. Seating: 6

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## Home Location View

Genesys Training Manager Training Portal

Location: Main Menu > Trainer Calendar

Rachel O'Neill - [rachel] Logout

trainer calendar

Required fields

Legend

- Scheduled: Events partially or fully scheduled
- Completed: Events no longer requiring action
- Other: Other calendar entries

trainer selection

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

Select All | Unselect All

Internal

- <No Location>
- London
- Rachel O'Neill [rachel]
- Manchester
- Daniel Oliver [daniel]
- External

Standard View | Planner View

Search

Go to Advanced Search

Start Date: 28 May 2012 End Date: 25 Jun 2012 Sort By: Trainer Go

Daniel Oliver

Monday, 11 June 2012

- 08:30 - 17:00 GMT (Daylight Savings) Holiday

Tuesday, 12 June 2012

- 08:30 - 17:00 GMT (Daylight Savings) Holiday

Tuesday, 19 June 2012

- 08:30 - 17:00 GMT (Daylight Savings) Holiday

Wednesday, 20 June 2012

- 08:30 - 17:00 GMT (Daylight Savings) Holiday

Thursday, 21 June 2012

- 11:00 - 11:30 GMT (Daylight Savings) New Product Training (NP1001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Friday, 22 June 2012

- 11:00 - 11:30 GMT (Daylight Savings) New Product Training (NP1001) - Day 2 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Monday, 25 June 2012

- 13:00 - 13:30 GMT (Daylight Savings) New Product Training (NP1001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 5 / Max. Seating: 6

## Alphabetical View

Genesys Training Manager Training Portal

Location: Main Menu > Trainer Calendar

Rachel O'Neill - [rachel] Logout

trainer calendar

Required fields

Legend

- Scheduled: Events partially or fully scheduled
- Completed: Events no longer requiring action
- Other: Other calendar entries

trainer selection

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

Select All | Unselect All

Internal

- Daniel Oliver [daniel]
- Rachel O'Neill [rachel]
- External

Standard View | Planner View

Search

Go to Advanced Search

Start Date: 28 May 2012 End Date: 25 Jun 2012 Sort By: Trainer Go

Daniel Oliver

Monday, 11 June 2012

- 08:30 - 17:00 GMT (Daylight Savings) Holiday

Tuesday, 12 June 2012

- 08:30 - 17:00 GMT (Daylight Savings) Holiday

Tuesday, 19 June 2012

- 08:30 - 17:00 GMT (Daylight Savings) Holiday

Wednesday, 20 June 2012

- 08:30 - 17:00 GMT (Daylight Savings) Holiday

Thursday, 21 June 2012

- 11:00 - 11:30 GMT (Daylight Savings) New Product Training (NP1001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Friday, 22 June 2012

- 11:00 - 11:30 GMT (Daylight Savings) New Product Training (NP1001) - Day 2 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Monday, 25 June 2012

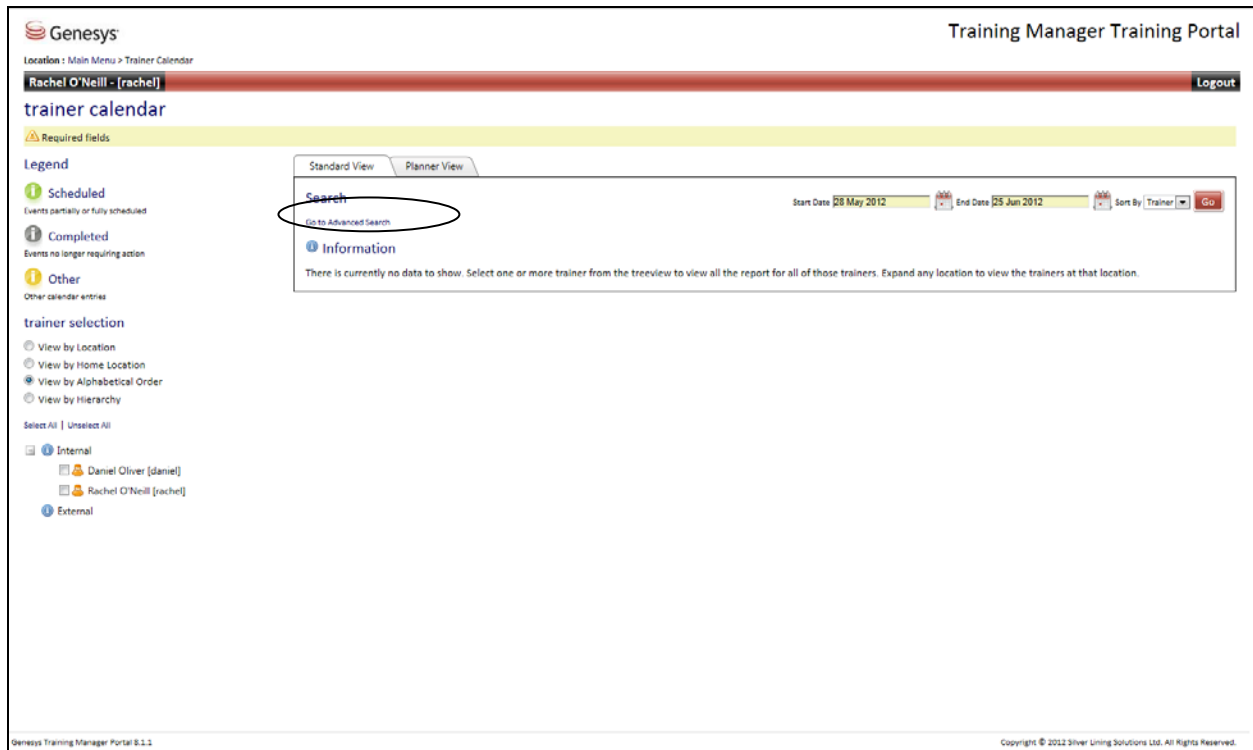
- 13:00 - 13:30 GMT (Daylight Savings) New Product Training (NP1001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 5 / Max. Seating: 6

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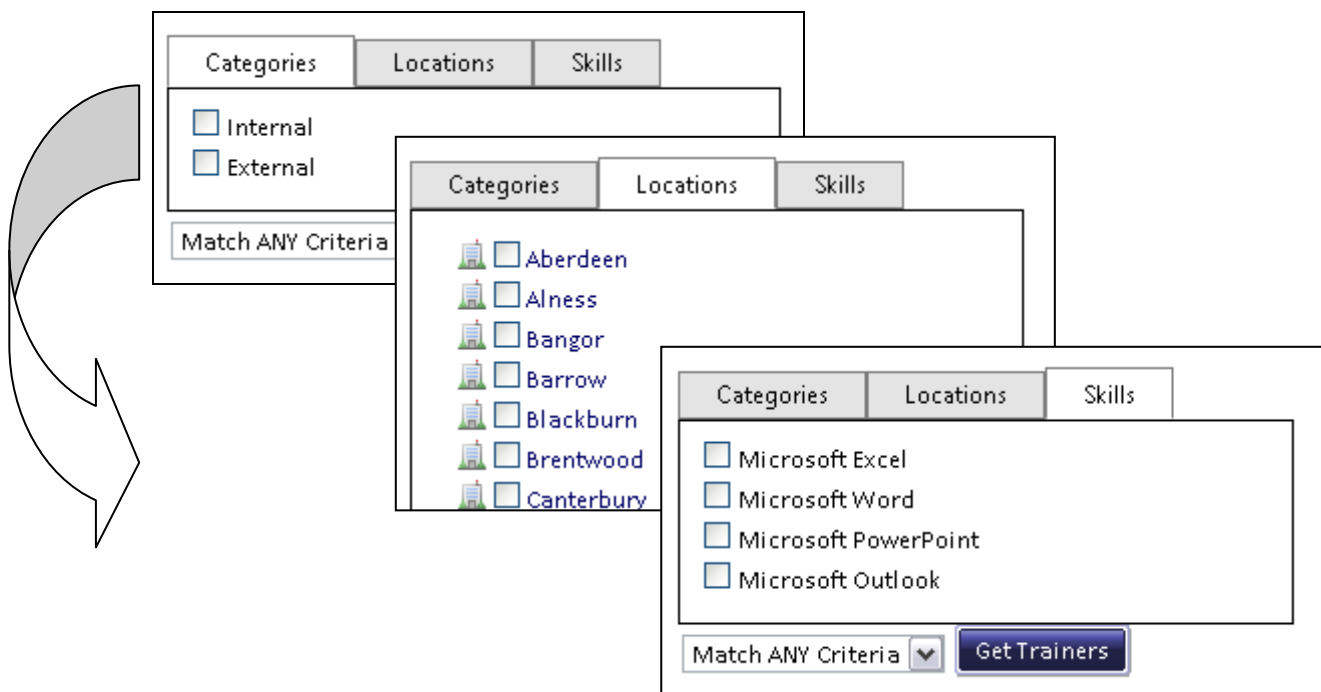
## Advanced Search Option

There is now a Go to Advanced Search option available on the Standard View tab.

Click Go to Advanced Search and select Advanced Search, and a table appears in the bottom-left corner of the screen.



There are different options available to search for a trainer who matches the required criteria.



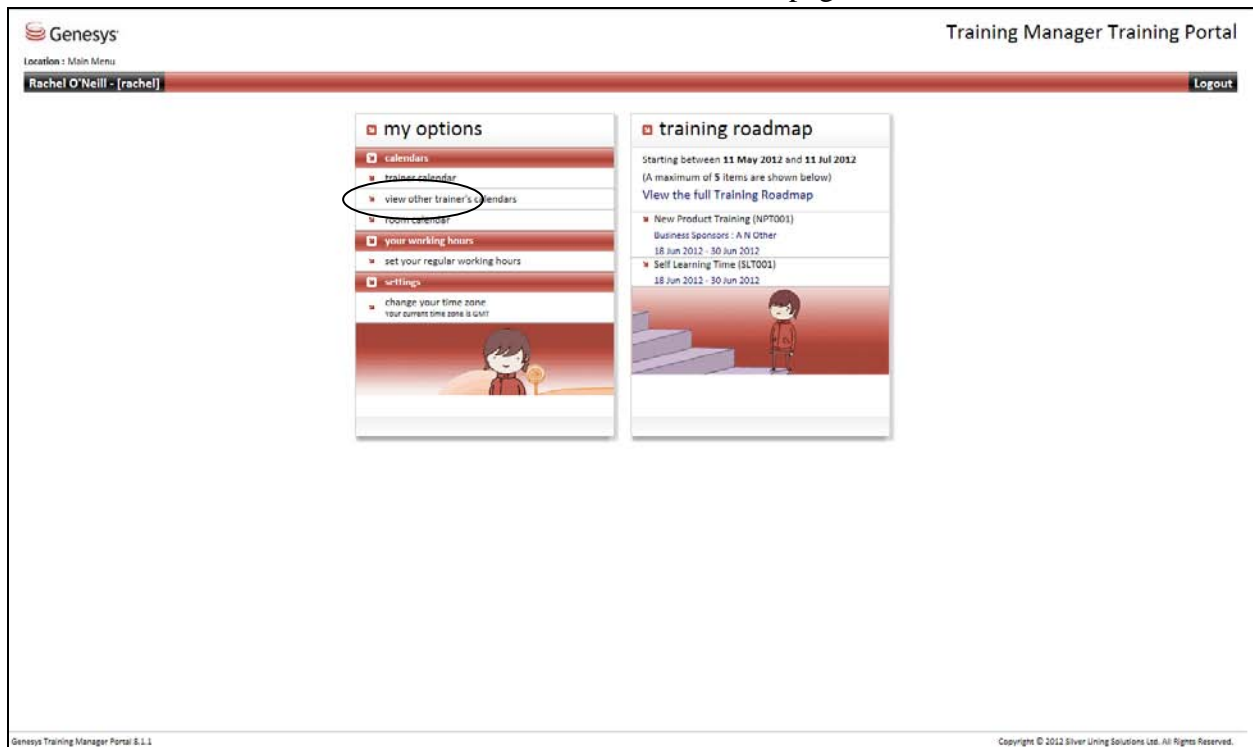
Select the relevant criteria to search against, and then the Match ANY criteria and Match ALL criteria options are available for selection in the drop-down list. Select an option, and then click Get Trainers.

Any trainers who match the criteria will then be presented.

Select the required trainer and date filter to view the trainer's calendar.

## Room Calendar

To view the room calendar, click **room calendar** on the home page.



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

Expand the location to reveal any associated rooms.



Genesys Training Manager Training Portal

Location: Main Menu > Room Calendar

Rachel O'Neill - [rachel] Logout

room calendar

Required fields

Legend

- Scheduled: Events partially or fully scheduled
- Completed: Events no longer requiring action
- Other: Other calendar entries

rooms and locations

- Internal
  - London
  - Manchester
    - Manchester Room 1
    - Manchester Room 2
    - Manchester Room 3
- External

Standard View Planner View

Search

Information

There is currently no data to show. Click on a Location in the TreeView to view all the Calendars of the Rooms at that Location, or expand any Location to view the Rooms at that Location. Click on an individual Room to view the Calendar of that Room only.

Start Date [20 May 2012] End Date [25 Jun 2012] Sort By Room Go

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Select either a location or a room to view its activity. In the example below Manchester Room 1 has been selected.

Genesys Training Manager Training Portal

Location: Main Menu > Room Calendar

Rachel O'Neill - [rachel] Logout

room calendar

Required fields

Legend

- Scheduled: Events partially or fully scheduled
- Completed: Events no longer requiring action
- Other: Other calendar entries

rooms and locations

- Internal
  - London
  - Manchester
    - Manchester Room 1
    - Manchester Room 2
    - Manchester Room 3
- External

Standard View Planner View

Search

Manchester Room 1

Tuesday, 19 June 2012

- 09:15 - 09:45 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max Seating: 6

Wednesday, 20 June 2012

- 09:15 - 09:45 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max Seating: 6

Thursday, 21 June 2012

- 11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max Seating: 6

Friday, 22 June 2012

- 11:00 - 11:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max Seating: 6

Saturday, 23 June 2012

- 07:00 - 07:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max Seating: 6

Sunday, 24 June 2012

- 07:00 - 07:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max Seating: 6

Monday, 25 June 2012

- 13:00 - 13:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max Seating: 6
- 15:00 - 15:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max Seating: 6

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Click one of the training session bars to reveal the training details, including the trainer and the scheduled attendees.

The screenshot displays the Genesys Training Manager Training Portal. The top navigation bar includes the Genesys logo, the user name "Rachel O'Neill - [rachel]", and a "Logout" button. The main content area shows a calendar view for "Manchester Room 1" from May 28 to June 25, 2012. A callout box with the text "Click on the bar to reveal the detail." points to a green bar representing a training session on Tuesday, 19 June 2012, from 09:15 to 09:45 GMT (Daylight Savings). The session details are as follows:

- Training Request:** New Product Training (NPT001)
- Trainer:** Lucy McDonald
- Room:** Manchester Room 1
- Attendees:** U\_7005\_Simulator (Larry Fin), U\_8335\_Simulator (Lindsay Marie), U\_8234\_Simulator (Tracy Neal)

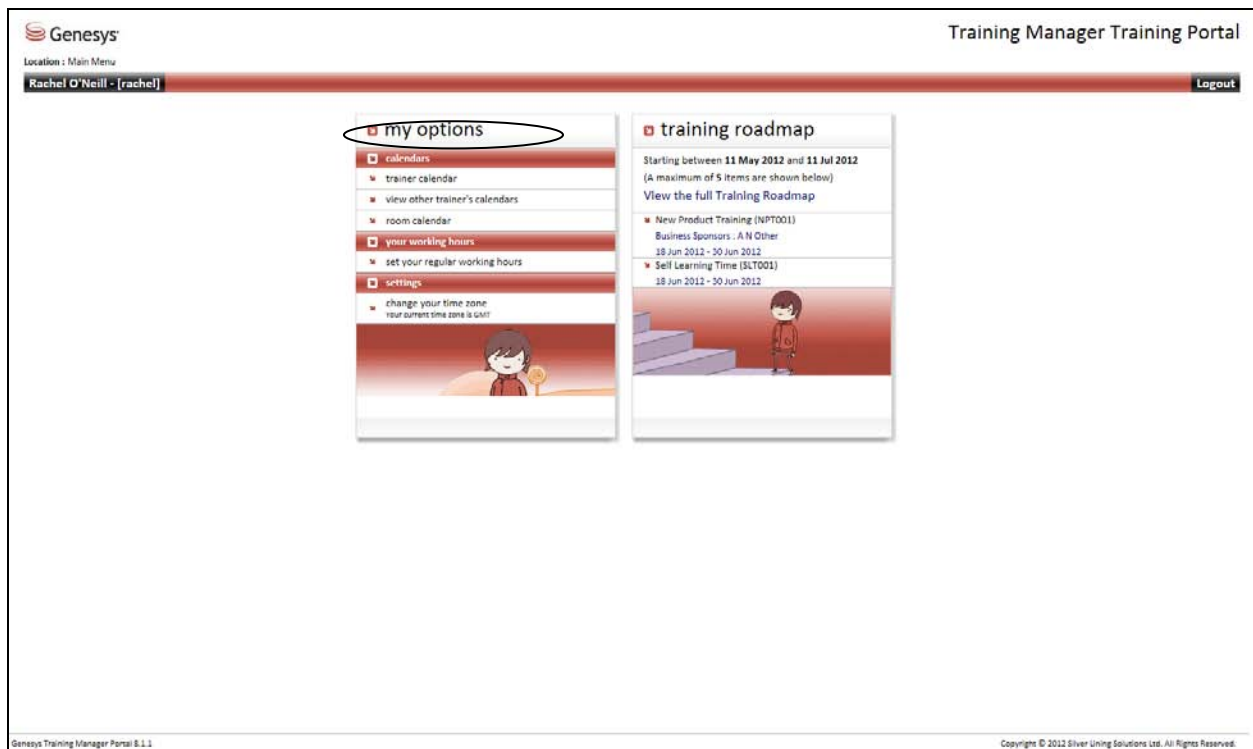
The calendar also shows other training sessions for the following days:

- Wednesday, 20 June 2012:** 09:15 - 09:45 GMT (Daylight Savings) - New Product Training (NPT001) - Day 2 of 2. Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6.
- Thursday, 21 June 2012:** 11:00 - 11:30 GMT (Daylight Savings) - New Product Training (NPT001) - Day 1 of 2. Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6.
- Friday, 22 June 2012:** 11:00 - 11:30 GMT (Daylight Savings) - New Product Training (NPT001) - Day 2 of 2. Trainer: Daniel Oliver / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6.
- Saturday, 23 June 2012:** 07:00 - 07:30 GMT (Daylight Savings) - New Product Training (NPT001) - Day 1 of 2. Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6.
- Sunday, 24 June 2012:** 07:00 - 07:30 GMT (Daylight Savings) - New Product Training (NPT001) - Day 2 of 2.

The footer of the page includes "Genesys Training Manager Portal 6.1.1" and "Copyright © 2012 Silver Lining Solutions Ltd. All Rights Reserved."

## View Other Trainers' Calendars

Trainers have the ability to view another trainer's Calendar by selecting view other trainers' Calendars.



The trainer calendar view appears. A list of available trainers will appear at the left hand side.

Select the required trainer and then click on Go to view their activity. There is also the option to view the activity in the Planner view.

Genesys Training Manager Portal 8.1.1

Location: Main Menu > Trainer Calendar (Read Only)

Rachel O'Neill - [rachel]

trainer calendar

Legend

- Scheduled (Events partially or fully scheduled)
- Completed (Events no longer requiring action)
- Other (Other calendar entries)

trainer selection

- View by Location
- View by Home Location
- View by Alphabetical Order
- View by Hierarchy

Select All | Unselect All

Internal

- ☒ Daniel Oliver [daniel]
- ☒ Lucy McDonald [lucy]
- ☒ Rachel O'Neill [rachel]

External

Standard View | Planner View

Search

Start Date: 20 May 2012 | End Date: 25 Jun 2012 | Sort By: Trainer | Go

Lucy McDonald

Tuesday, 19 June 2012

- 09:15 - 09:45 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Wednesday, 20 June 2012

- 09:15 - 09:45 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Monday, 25 June 2012

- 15:00 - 15:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

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

Genesys Training Manager Portal 8.1.1

Location: Main Menu > Trainer Calendar (Read Only)

Rachel O'Neill - [rachel]

trainer calendar

Legend

- Scheduled (Events partially or fully scheduled)
- Completed (Events no longer requiring action)
- Other (Other calendar entries)

trainer selection

- View by Location
- View by Home Location
- View by Alphabetical Order
- View by Hierarchy

Select All | Unselect All

Internal

- ☒ Daniel Oliver [daniel]
- ☒ Lucy McDonald [lucy]
- ☒ Rachel O'Neill [rachel]

External

Standard View | Planner View

Search

Start Date: 20 May 2012 | End Date: 25 Jun 2012 | Sort By: Trainer | Go

Lucy McDonald

Tuesday, 19 June 2012

- 09:15 - 09:45 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Training Request: New Product Training (NPT001) | Trainer: Lucy McDonald

Training Event: Event 1 | Room: Manchester Room 1

Employee ID	First Name	Last Name
U_7005_Simulator	Larry	Fin
U_8335_Simulator	Lindsay	Marie
U_8234_Simulator	Tracy	Neal

No Attendance/Completion Recorded

Wednesday, 20 June 2012

- 09:15 - 09:45 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Saturday, 23 June 2012

- 07:00 - 07:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

Sunday, 24 June 2012

- 07:00 - 07:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 2 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

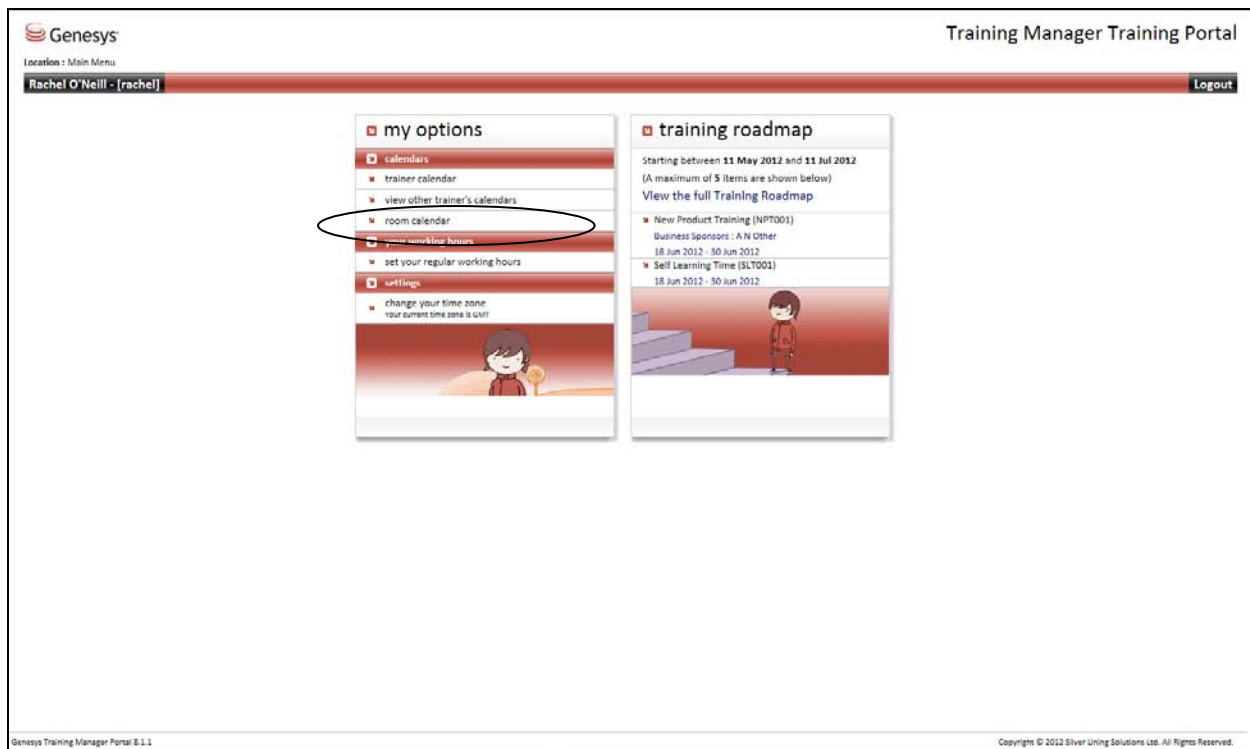
Monday, 25 June 2012

- 15:00 - 15:30 GMT (Daylight Savings) New Product Training (NPT001) - Day 1 of 2  
Trainer: Lucy McDonald / Room: Manchester Room 1 / Attendees: 3 / Max. Seating: 6

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## Set Your Regular Working Hours

The working hours of trainers are kept up to date in Training Manager by clicking set your regular working hours on the home page. This may not be necessary for the trainer manager if he or she 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 changes have to be made, use the drop-down lists to select the correct times for the appropriate day. This procedure should not be used to exclude dates and times because of holidays, because these are entered by using the instructions in the 'Trainer Calendar' section. The hours entered are then immediately updated in Training Manager and are visible for the trainer.

Genesys Training Manager Training Portal

Location: Main Menu > Set Working Day Defaults

Rachel O'Neill - [rachel] Logout

### Set Your Regular Working Hours

Information

Change the data to set your default working days and

Day Of Week	Start Time	End Time	Earliest Lunch Start	Latest Lunch End
Monday	08:00	17:00	12:00	13:00
Tuesday	08:00	17:00	12:00	13:00
Wednesday	08:00	17:00	12:00	13:00
Thursday	08:00	17:00	12:00	13:00
Friday	08:00	17:00	12:00	13:00
Saturday	08:00	17:00	12:00	13:00
Sunday	08:00	17:00	12:00	13:00

Save

Use the drop down box to select the amended working hours.

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## Training Roadmap

Click view the full training roadmap on the home page. (The latest scheduled training will be visible on the home page under training roadmap.)

Genesys Training Manager Training Portal

Location: Main Menu

Rachel O'Neill - [rachel] Logout

#### my options

- calendars
  - trainer calendar
  - view other trainer's calendars
- room calendar
- your working hours
  - set your regular working hours
- settings
  - change your time zone: your current time zone is GMT

#### training roadmap

Starting between 11 May 2012 and 11 Jul 2012  
(A maximum of 5 items are shown below)

**View the full Training Roadmap**

- Trainer Profile Training (UP0004)
- Business Sponsors - A N Other
  - 18 Jun 2012 - 30 Jun 2012
- Self Learning Time (SLT001)
  - 18 Jun 2012 - 30 Jun 2012

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

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

The screenshot displays the Genesys Training Manager Training Portal. The header includes the Genesys logo, the user name "Rachel O'Neill - [rachel]", and a "Logout" button. The main content area is titled "training roadmap" and features a "Legend" on the left side, which is circled. The legend lists four status categories: "Unscheduled" (Events awaiting scheduling), "Scheduled" (Events partially or fully scheduled), "Completed" (Events no longer requiring action), and "Other" (Other calendar entries). A "Show All" link is also present. The main area shows a list of training sessions, including "New Product Training (NPT001)" and "Self Learning Time (SLT001)". A callout box points to the "New Product Training (NPT001)" entry, stating: "Click on the bar to reveal any training detail. There is also the filter option available." The callout box also points to the "Sort By" dropdown menu in the top right corner of the training sessions list. The footer of the page includes the text "Genesys Training Manager Portal 8.1.1" and "Copyright © 2012 Silver Lining Solutions Ltd. All Rights Reserved".