Genesys

Training Manager Web Portal 8.5.647

Administrator User Guide

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1 Overview

Welcome to the *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.

2 About Portal

Training Manager enables companies to create, manage, and schedule multiple agent training activity and team meetings and one-to-ones automatically in 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.

Portal is a browser-based web portal that comes as part of the application, allowing visibility of the scheduled training and meeting activity together with any other details available; for example, reason for the training, room, trainer, and any pre-training work if required. The trainer updates attendance through their online attendance register, which they access directly through Portal. This automatically updates Portal with who has attended; if there were any non-attendees they can be "mopped up" automatically as part of the scheduling process.

3 Web Portal Administrator

3.1 The Administrator

Depending on how the Portal is accessed a login may be required.The administrator is created in Training Manager and therefore your log in details will be provided at the time of creation.

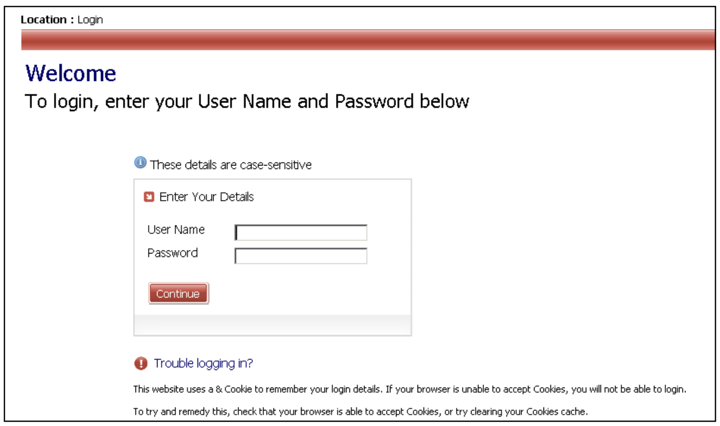

Figure 1: Login screen

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 Portal, then training sessions will show incorrect times. Select **Continue** to access the Home page.

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

Figure 2: Setting your time zone

The home page is separated into three sections, **my options** in the left pane, **admin options** in the middle 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.

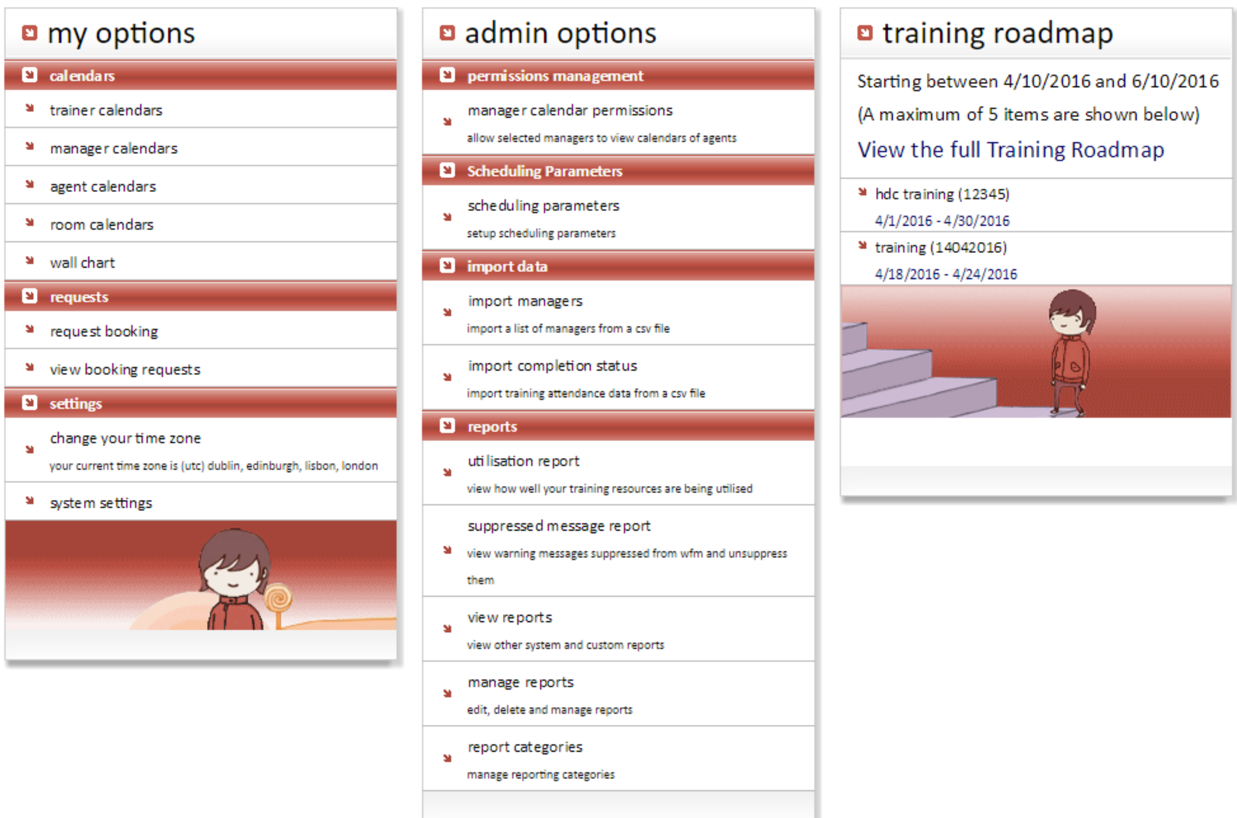

Figure 3: Home page

The administrator has full access to the portal and can view the following:

- trainer calendars
- manager calendars
- agent calendars
- room calendars
- change your time zone

There is also additional administrator functionality:

- manager calendar permissions
- import managers

- import completion status
- utilisation report
- suppressed message report
- view reports
- manage reports
- report categories

The screen is separated into three parts: **my options** in the left-hand window, **admin options** in the middle, and **training roadmap** in the right-hand window.

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

3.2 My Options

In the **'My options'** window, the administrator has access to the following options:

- Trainer Calendar
- Manager Calendars
- Agent Calendar
- Room Calendar
- Change your time zone

Please refer to the individual administration guides for information on the above functionality.

The option to logout is available in the top right hand corner of each screen.

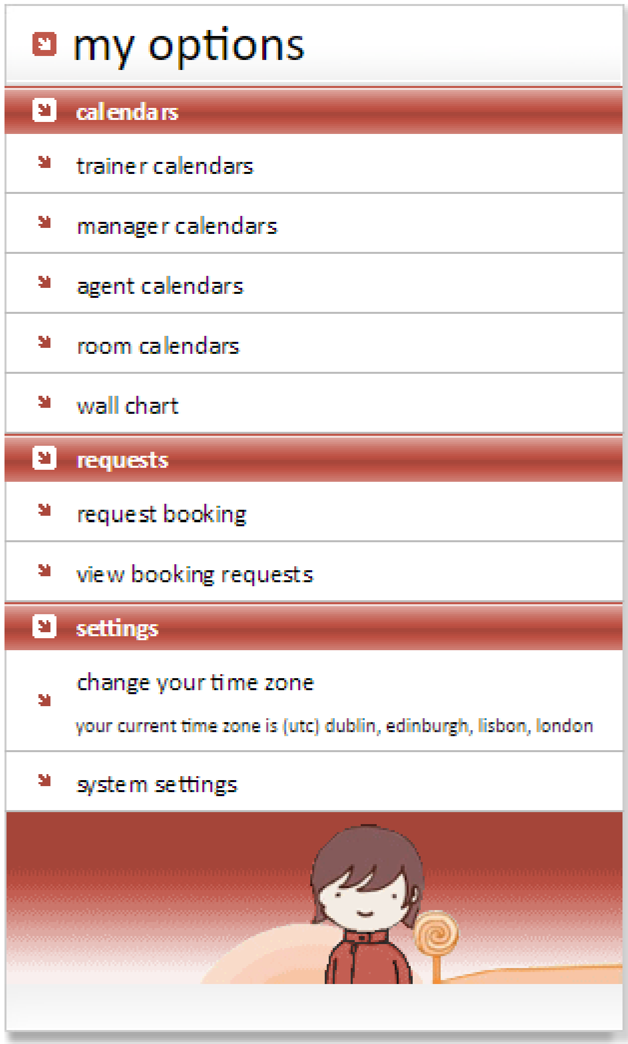

Figure 4: My options

3.3 Permissions Management

Where there is no integration into a HR system to maintain the manager/team relationship then the team structure has to be kept up to date using the permissions management process.

Select **manager calendar permissions** in the **admin options** window.

Figure 5: Selecting manager calendar permissions

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

To return to the home page, click **Main Menu** at any time.

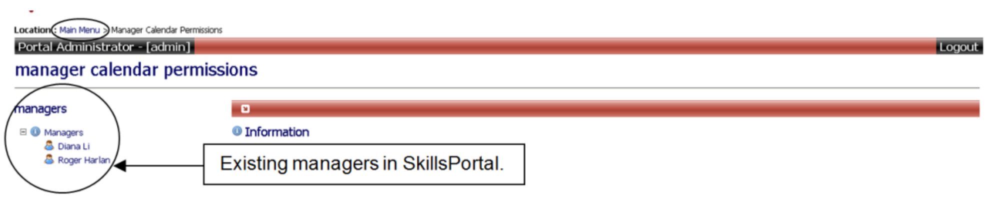

Figure 6: Display of existing managers

To associate team members to a manager, select the manager from the left hand side and then in the **add agent** box enter the name of the team member. A filtered list of agents will appear based on the information entered to select the individual from.

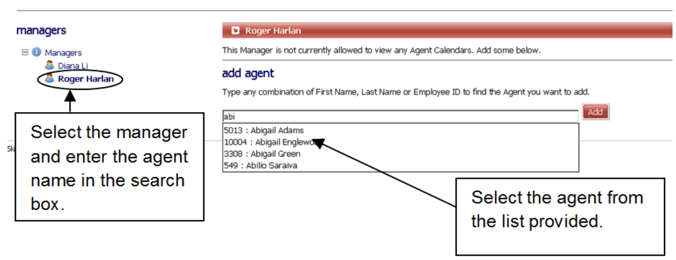

Figure 7: Associating team members with a manager

After identifying the required agent, click the **Add** button. This will add the agent to the manager list.

Continue associating any remaining members of the managers team until the list has been completed. It is possible to import the initial manager/team relationship (see the next admin option **import manager for instructions),** however, this can only be done once.

By associating agents to managers this allows the manager to view the agent training and meeting activities in their manager Portal. Without this association they will have no visibility of their agents.

To remove an agent from the manager list click on the 'X'.

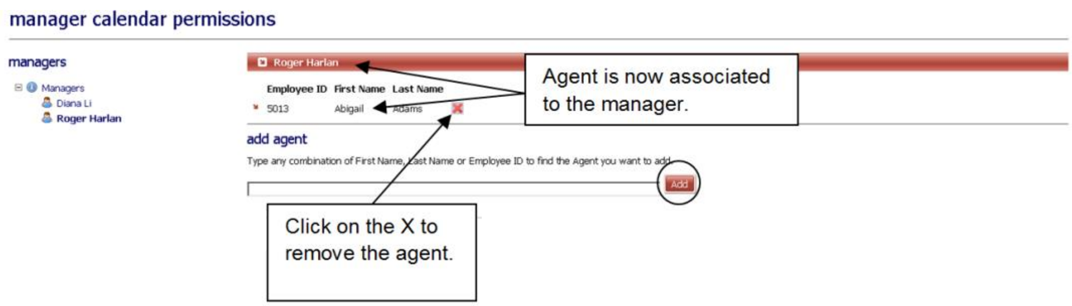

Figure 8: Removing an agent from a manager's list

3.4 Import Manager Details

An initial import to create the manager / team relationship can be done through the **import manager details** option. This can only be done the once and thereafter the relationship has to be managed manually in the **manage calendar permissions** admin option.

Select **import managers** to access the import process.

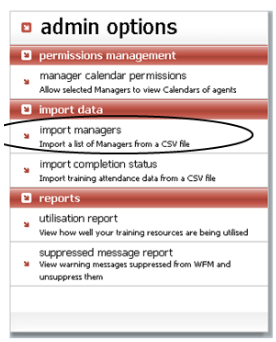

Figure 9: Importing manager details

After selecting **import manager details** the following screen appears allowing you to import csv files.

Select **Browse** to browse for the file that you want 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.

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

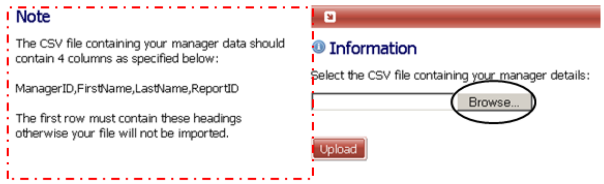

Figure 10: Uploading data from a CSV document

As in the example below, the CSV file containing the manager data should contain the following columns:

ManagerID

Manager's First Name

Manager's 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

Figure 11: Example CSV file

This will create the initial manager/team relationship list.

3.5 Import Completion Status Data

This process is used for updating the completion status for scheduled e-learning. If there is direct integration then the completion will be tracked automatically, however if there is no integration the attendance can be managed manually or by using this import completion process using a CSV file.

Click on **import completion status** to access the import process.

Figure 12: Importing completion status

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 Portal Training Request for this to work correctly.

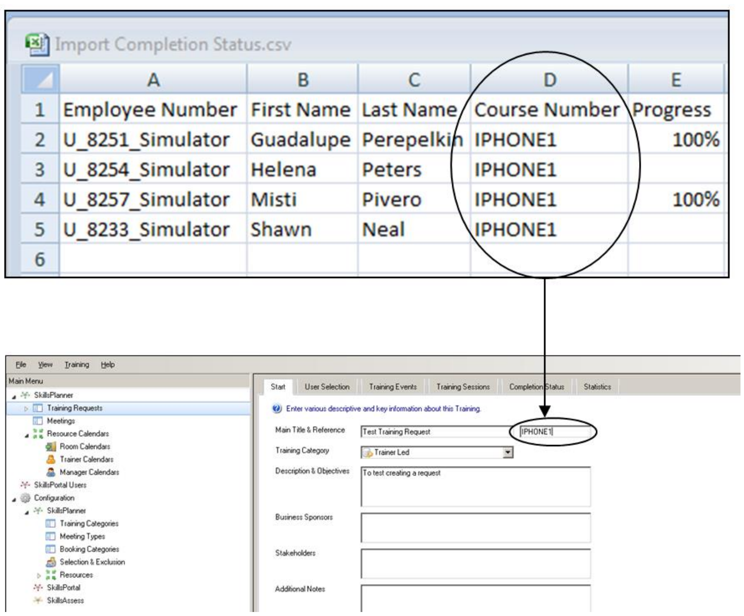

Figure 13: Example CSV import

Select the **Browse** 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** to upload the data.

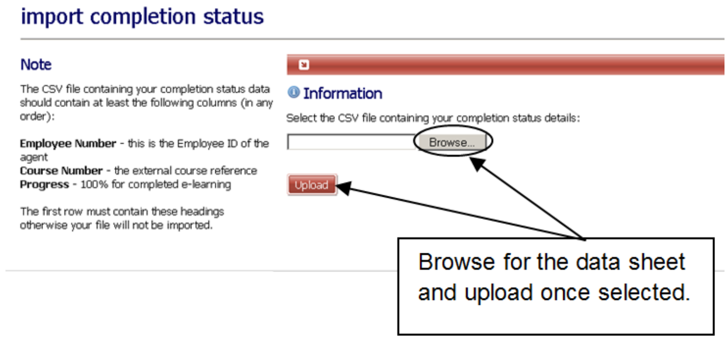

Figure 14: Uploading a CSV file

As in the example below, Portal is then automatically updated with the completion information from the imported report.

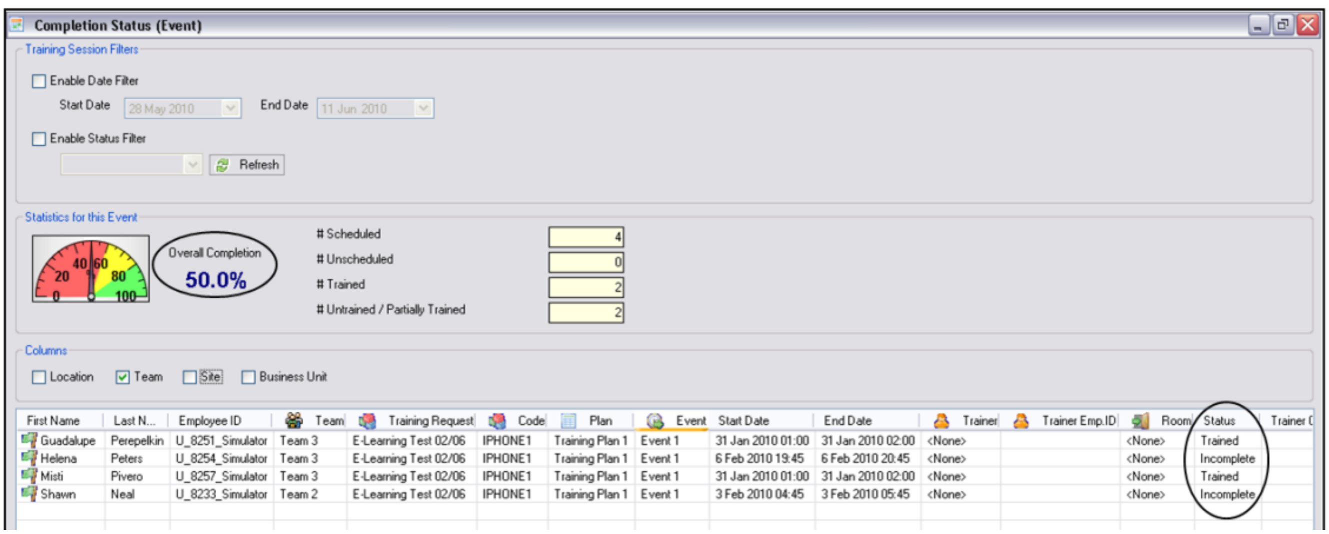

Figure 15: Display of uploaded results

3.6 Utilisation Report

The utilisation report is for Trainer and Room utilisation.

Click on utilisation report.

There are two options available, either select Trainers or Rooms from the drop down box. In this example Trainers has been selected and therefore a list of trainers are available at the left hand side to select from to report against.

Select the required trainers and date range, then click Go to generate the report.

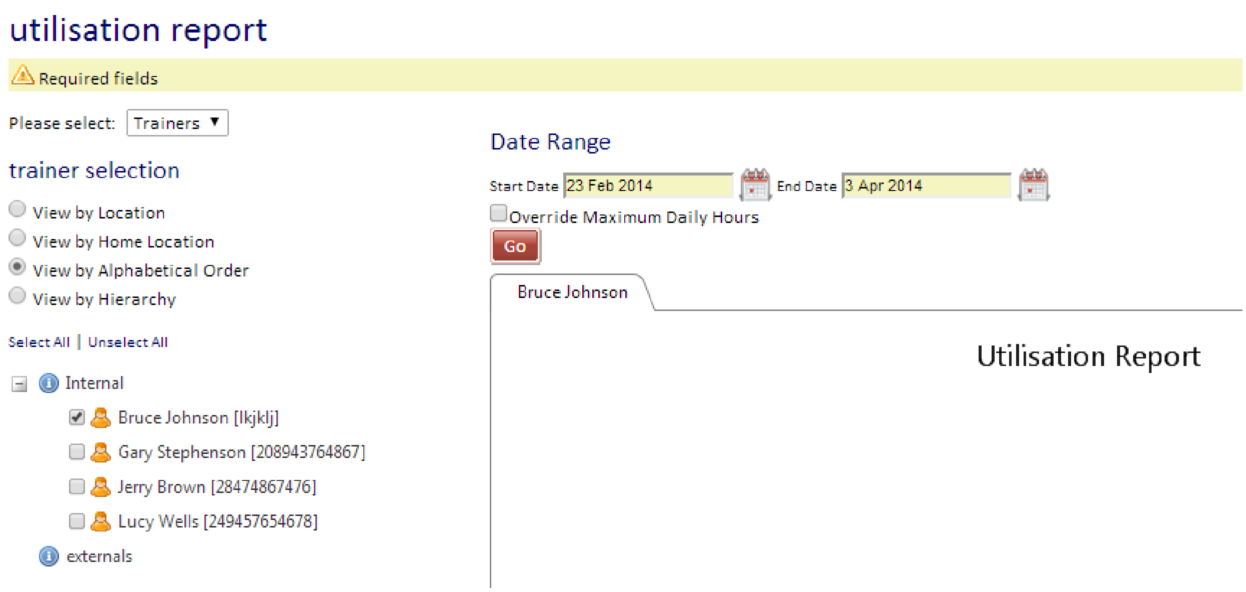

Figure 16: Creating an utilisation report for trainers

There is also the option to override maximum daily hours by selecting the **Override Maximum Daily Hours checkbox** and entering a value into the Hours per day textbox. Use the override maximum daily hours option to cause the report to ignore trainers' configured maximum hours per day, or default room availability (24 hours per day), in favour of the value entered into the **Hours per day** textbox.

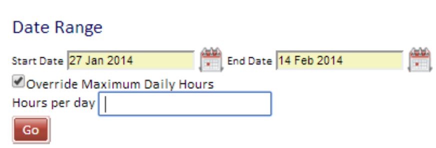

Figure 17: Overriding maximum daily hours

In the example below the override option has not been selected. The pie chart presents an overall view or individual utilisation views by trainer (or Room). Select each individual trainer if required.

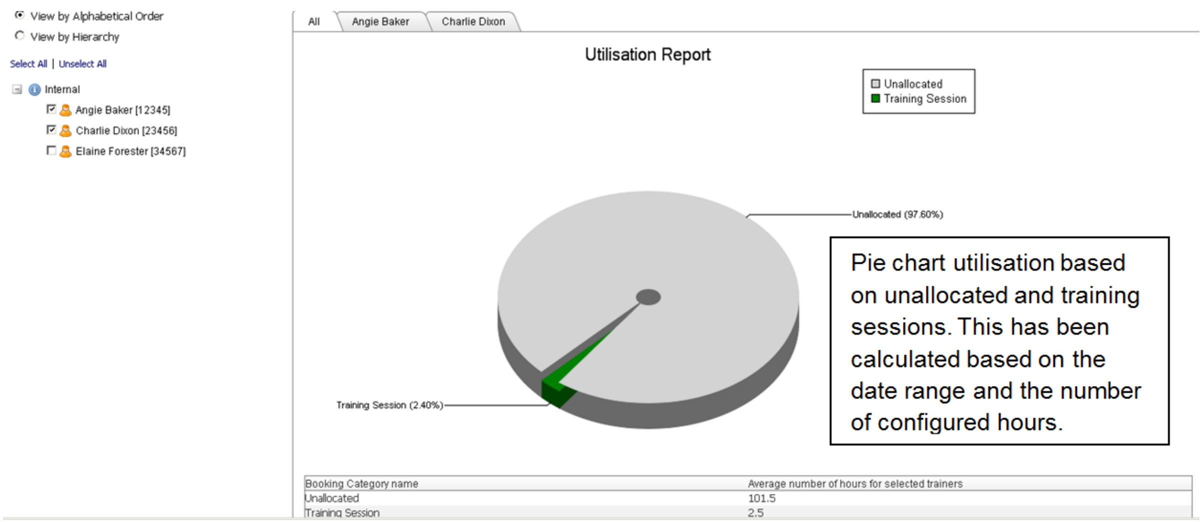

Figure 18: Report display

3.7 Training Roadmap

The latest scheduled training activity will be displayed in the training roadmap in the right pane of the home page, as shown in the following example.

Click **view the full training roadmap** to view all of the training sessions currently scheduled in Portal.

Figure 19: Training roadmap

Any scheduled training activity for the specified date range will be presented on the right side of the screen, and clicking one of the training session bars will reveal any additional details.

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

There is an option to filter the sessions by using the **Sort By** drop-down list.

Click one of the training session bars to reveal any additional details, such as objectives or additional notes. The training sessions can also be filtered by using the **Sort By** drop-down list.

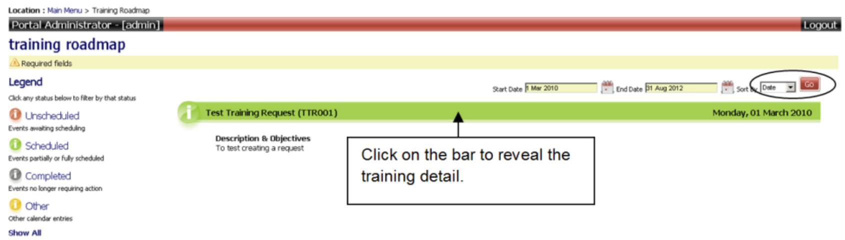

Figure 20: Viewing training detail and filtering results

3.8 Meeting Notes in Portal

Portal managers and administrators are able to create notes for meeting sessions. These notes can then be viewed by meeting attendees. To create meeting notes:

1. Login to Portal and click view your calendar in standard view
2. Select the meeting that you wish to create notes for
3. Click the Edit button next to the meeting information
4. Enter the meeting notes
5. Click the Save button

Notes:

- Managers can only create/edit notes for their own meeting sessions
- Administrators can create/edit notes for all meetings
- Agents can view meeting notes which they are expected to attend, but cannot make changes to the notes.

4 Resources Wall Chart

The Resources Wall Chart in Portal allows managers, trainers and administrators the ability to view calendars for multiple agents at the same time. To view calendars, select the managers/trainers/rooms from the tree view on the left side of the screen by ticking the associated checkboxes. Use the Today button to move the calendar view to the current date. The < and > buttons move the date range backward/forward either a day/work week/week or month depending on the calendar view mode. Hovering over the calendar entries will result in the display of a label that will contain more detail about the calendar item.

The Wall Chart supports three types of view:

- Calendar views (day, work week, week and month), which show events in a traditional calendar format. This view uses a set of rotating colours based on the resource selected.
- Agenda view, which shows individual upcoming events for the selected date window
- Timeline views (day, work week, week and month), which present events in a continually scrolling line. These views use the colours from the Legend, which are the categories defined in Training Manager. There is also an UNKNOWN category that is in black. You can also define the column width of the Month Timeline View from the Portal Settings page.

The wall chart screens can be configured to only show business hours by specifying the business hours in the Portal System Settings page (business hours over midnight are not supported). The **Show full day** option remains available in Wall Chart after specifying business hours. Toggling between business hours/full day is not available in Month and Timeline Month views.

Notes:

- The viewing of agents' calendars is not supported in this view – only manager, trainer and room calendars are available.
- The calendars that are available depend on the type of user who is logged in. Administrators can see calendars for trainers, managers and rooms. Trainers can see calendars for other trainers and rooms. Managers can see calendars for other managers and rooms.
- Agents do not have access to this page.
- Calendar entries will only appear in the Wall Chart if they are set to **Approved** or **Completed**, unless Portal is set to display items that are set to **Pending Approval**.

5 Request Booking in Portal

5.1 Request Booking

Managers and trainers can make requests to schedule events such as meetings and training courses for specific users and during specific date ranges by creating booking requests in the Portal. The booking request will appear in the Training Manager client application which can then be used to search for and publish meeting or training sessions. This feature is available from my **options -> requests -> request booking**.

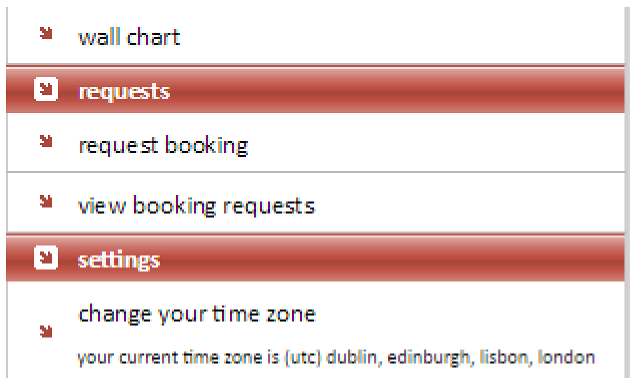

Figure 21: Request Training Link

Clicking on this menu option will open the **request booking** form.

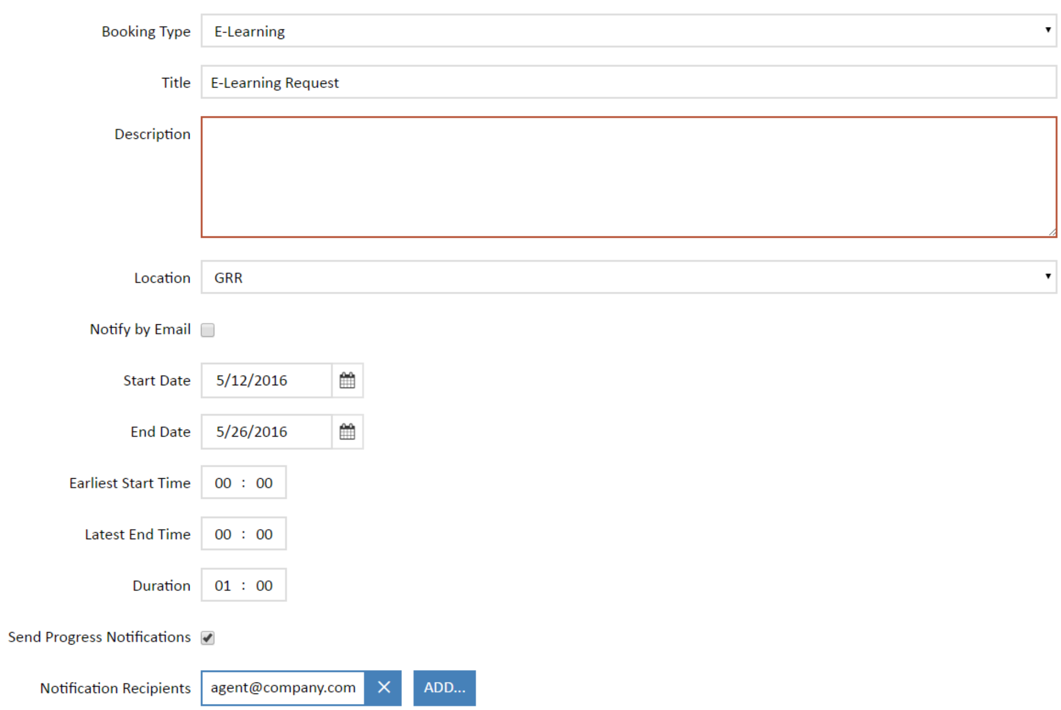

Figure 22: Request Training Form

All form fields highlighted red are mandatory fields. Selecting a booking type may provide more mandatory fields or different options depending on the booking type being used. The **Display on Training Roadmap** checkbox controls whether the request will be visible on the Training Roadmap screen (this will also depend on whether pending training requests are set to be displayed within Portal). The **Start Date** and **End Date** controls are used to define the date range within which the booking should be scheduled.

The Send Progress Notifications option allows for the sending of notification emails (to the email addresses specified in the Notification Recipients field) when the status of the booking request changes, e.g. the session search completes and all sessions are published.

The bottom part of the screen allows the user to define the users who should be included in the booking request. There are two view options for selecting users for a booking: **View Hierarchy** and **Search For Users**. The **View Hierarchy** option displays a hierarchy of your organisation and allows you to select either individual users or groups by ticking the appropriate checkboxes.

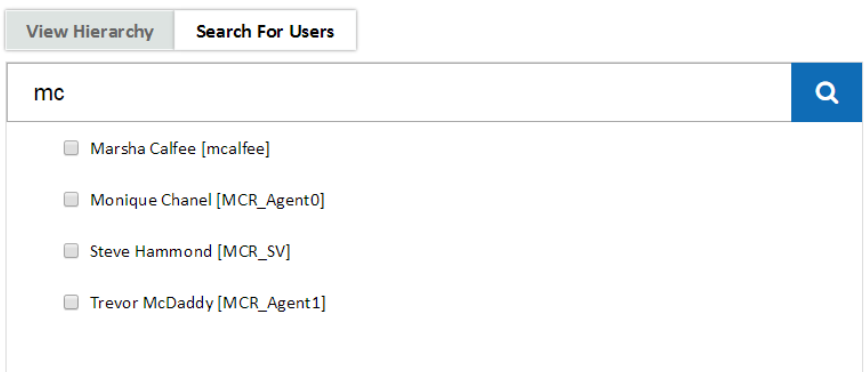

Figure 23: Selecting users from the WFM hierarchy

Once you've made a selection, Click the **>** button to add the users to the Selected Users box on the right side of the page. If you wish to remove users from the Selected users box, tick the corresponding checkbox for the selected users box and click the **<** button. It is possible to add whole groups to the selected users box in this view, rather than adding many users individually.

The **Search For Users** tab allows you to search for users in your organisation and add them to the selected users box. The search box requires two characters or more and will list results in alphabetical order by last name, then by first name. The search feature looks for the search value in users' first names, last names and employee IDs. If only a single word is specified, the results will include any user where the word occurs in either first name, last name or employee ID. If more than one search term is specified, the results will include only the users for whom the search terms are present in the first name, last name and/or employee Id. The search feature is not case sensitive.

Figure 24: Searching for users

As with the **View Hierarchy** mode, users can be added to the training request by ticking their corresponding checkboxes in the search results and clicking the **>** button. Likewise, users can be removed from the training request in this mode by ticking the checkboxes in the selected users box and clicking the **<** button.

There are no restrictions to the use of these two modes; some users/groups can be added via the **View Hierarchy** option and other users can be added via the **Search For Users** tab.

Click the submit button in the bottom-right corner of the page to submit your training request, once you are happy with the specified form entries and user selection. Once the training request has been saved, you'll see a 'Your request has been submitted.' message and have the option to either return to the Portal home page or submit a new training request. The new booking request will then be available to Training Manager users under the Training Requests/ Pending menu or Meeting under meeting Requests. They will then be able to edit all of the submitted information (including the user selection), then search for and publish training/meeting sessions. Published sessions will then appear in the attendees' Portal calendars.

Note: It is possible to add groups to the booking request in the View Hierarchy option. This will result in the groups being listed in the selected users box. Opening the groups in the selected box via the hierarchy view allows the removal of individual users from the selection. This will result in the remaining members of that group being listed individually rather than as part of the group.

5.2 Scheduling Training and Meeting Requests via Portal

Portal supports the ability of requesting training/meeting requests which are then passed on to planners to modify and schedule. This is done via the Request Bookings page. This page also allows Portal users to schedule meeting and training requests directly, without planners' involvement. When a booking request is scheduled, it is added to a queue and a search is run to find sessions to meet the criteria specified in the request.

If the option to schedule automatically isn't available, it is either because the scheduling parameters you are using and/or the mapping between booking types and scheduling parameters doesn't support auto-scheduling, or the feature has not been enabled on the Portal Settings page in the Planner client.

If this feature has been enabled, two buttons will appear at the bottom of the Request Booking page: **Request** and **Schedule**. Completing the booking request form and clicking the **Schedule** button will result in the request being added to a queue for processing. You'll be able to track the progress of the request from the **View Booking Requests** page. Newly created requests will initially have a status of 'Queued'. When the request is being processed, its status will change to 'Processing'.

For training requests, if the search for sessions yielded sessions for all users in the request, all sessions will be automatically published to WFM and the status of the request will change to **Active**. If not all users could be booked, the status of the request will be set to **Requested**.

For meeting requests, if sessions can be found for at least the **Min. % of Attendees Required**, all sessions are published to WFM and the status is set to **Active**. If sessions cannot be found for at least the **Min. % of Attendees Required**, then the status will remain as **Requested**.

For One-to-one meeting requests, if sessions can be found for all users all sessions will be published to WFM and the status will be set to "Active". If sessions can be found for some users, all found sessions will be published to WFM and the status of the request will be set to **Pending Approval**. If sessions were not found for any users, the status will remain in the **Requested** state.

For a solo-task meeting request, if sessions were found for all users, all sessions will be published to WFM and the status is set will be set to **Active**. If sessions can be found for some users, all found sessions will be published to WFM and the status will be set to **Pending Approval**.

Requests that remain in a Requested state can be modified and subsequent searches for sessions can be run by planners.

Clicking the View Details button in the View Booking Requests page will show additional detail about the selected booking request, including any sessions that were found during processing and whether the sessions have been published to WFM. The X alongside each booking request in the View Booking Requests form allows the user to cancel the booking request, which automatically unpublishes any published sessions and removes the booking request.

5.3 Viewing Booking Requests

Once users have requested a booking, they or an administrator can view those requests. To view the booking requests through Portal, click the view booking requests link. This page shows the booking requests that have been made either through Portal or Training Manager. The top of the page includes search and filter functions (searching by title, date range, booking type and status). The bar underneath the filters shows how many requests that are visible to the user are in each state (pending approval, active, rejected, requested or queued). Administrators are able to see all booking requests, whilst trainers and managers will only see the requests that they have made.

The main table in the page shows a list of booking requests, including the following details:

- Title
- Created By
- Date Created
- Booking Type
- Status
- Last Changed
- Position in Queue (if processing)

The table has standard paging controls in the bottom-left corner, an option to set the number of items visible per page and a display of the total number of items (and how many are shown on the current page) in the bottom right corner.

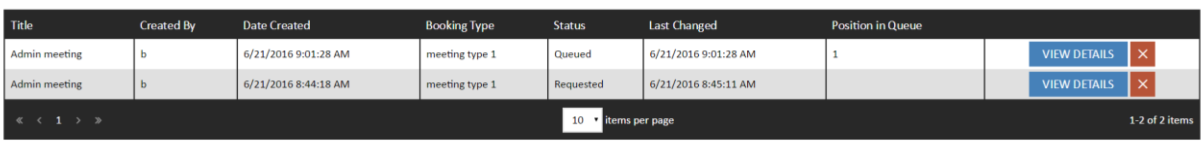

Figure 25: View Booking Requests

5.4 Cancelling Booking Requests

The 'X' icon on the right side of the View Details button can be used to cancel booking requests. Clicking the X icon will un-publish any sessions that were published for the request and set the status of the request to 'cancelled'. Cancelled booking requests do not appear in the Training Manager client.

The ability to cancel booking requests can be enabled/disabled in the Portal System Settings page by ticking/unticking the 'Allow cancellation of Booking Requests' option and clicking the Save button.

Administrators are able to cancel any booking request. Trainers and managers can only cancel the requests that they have created.

Further details (e.g. location, start date, end date, duration, notify by email and list of sessions) can be found by clicking the View Details button for the appropriate booking request. Click the View all booking sessions button to return to the main view booking requests page.

Request Name	Team Meeting 3	Status	Rejected
Booking Type	regular meeting	Description	Team 3 regular meeting
Requested By	GenesysWFM\demo	Manager	Roger Smith (2098347308467)
Location	london	Notify By Email	No
Start Date	4/11/2016	End Date	5/11/2016
Duration	01:00		

Sessions

VIEW ALL BOOKING REQUESTS

Figure 26 - View Booking Details

6 Managing and Viewing Crystal Reports

Portal supports the importing and viewing of custom-designed Crystal Reports. The features associated with Crystal Reports are only available to Portal administrators and are located in the Manage Reports, Report Categories and View Reports pages.

Note: The new Crystal Reports functionality is only supported for Internet Explorer version 8 or above and the latest versions of other browsers (e.g. Chrome and Firefox).

6.1 Manage Reports Page

The Manage Reports page allows users to create, edit, delete and archive reports. To upload a report, click the 'Add New Report' link. A pop-up form will appear. Set the report's name and category. The 'Admin Report' checkbox affects which Skills Assessor users will be able to see the report. If **Admin Report** is enabled only Skills Assessor administrator users (and Portal administrators) will be able to view the report. Click the 'select' button to choose a Crystal Report .RPT file to upload.

Once the upload has completed the two additional settings will need to be defined. The connection type checkboxes should be used to set which users you want the report to run against. It is possible for a report to run against Training Manager and/or Skills Assessor users. The second option should be used to map the report database to the name of the database used for your system. After entering these settings click the 'Add' button to complete the report upload.

Note: In certain cases it is possible for users to upload Crystal Report files to the web server without completing the setup of the report item in Portal. This will result in the report file being retained by the server; however, it will not be accessible via Portal. These files will be prefixed with 'TEMPFILE' and may be manually deleted from the server's Crystal Reports upload folder by administrators.

To edit report settings, select a report from the table in the Manage Reports page and click the associated 'Edit' link. A popup window will appear allowing you to change the details of the report, including name, category, the Crystal Reports .rpt file and database connection details. Once you have finished editing the report click the 'Update' button to apply the changes.

To archive a report, click its associated 'Archive' link from the table in the Manage Reports page. An archived report can be unarchived in a similar manner. Reports that are archived will not be listed in the 'View Reports' page.

All uploaded reports can also be downloaded via the 'download' link from the Manage Reports page.

6.2 Report Categories Page

Categories can be created, edited, deleted and re-ordered from the **Report Categories** page.

To create a new category, first select the parent category (i.e. the one that you want the new category to be under in the hierarchy), then click the green '+' icon.

Double-clicking on the new category will allow you to rename it. It is also possible to move categories to different locations by dragging them into other categories.

To delete a category, select it from the hierarchy and click the red ‘X’ icon. If the delete icon is disabled (if it is grey instead of red) then the selected category cannot be deleted. A category can be deleted only if it does not contain any other categories or reports.

6.3 Viewing Reports

Reports can be generated from the ‘View Reports’ page. The page will initially display the category hierarchy, including the reports that have been allocated to each category. Browse the category hierarchy and select the report that you wish to view. A Crystal Reports popup window will appear. Depending on how the report was developed, this window will either show the report immediately, or request additional information before displaying results.

6.4 Restricting Report Results

If the report is using the Training Manager database, it is possible to restrict the results to just the logged in user by passing the EmployeeID parameter to the crystal report.

If you wish to restrict report results so that only the details of the logged-in Skills Assessor user’s subordinates are displayed, the Crystal Report will need to include a UserID parameter. This parameter should have the ‘Show on (Viewer) panel’ attribute set to ‘Do not show’. Omitting this parameter will cause report results to include data about all Skills Assessor users, regardless of the access level of the logged in user.

Note: Crystal reports do not support multi-tenant Skills Assessor instances.

7 Scheduling Parameters

The Scheduling parameters feature allows Portal administrators to set the default scheduling parameters that will be used when scheduling training/meetings through Portal.

The feature allows for the creation of default scheduling parameter templates which include the following settings:

- Booking strategy (some settings apply to training only)
- Transition time
- Whether trainer travel is allowed (applies to training only)
- Minimum time spent on WFM activities ("activity gap") allowed before a session
- Minimum activity gap allowed after a session
- Minimum gap between sessions (applies to meetings only)
- Coverage tolerance
- Coverage target type
- Min % of attendees required (applies to meetings only)
- Which WFM activities can be interrupted
- Working hours on each day to consider (applies to training only)

Selecting the scheduling parameters option from the menu will show a table listing the existing saved templates. These can be edited or deleted by using the icons on the right side of the table.

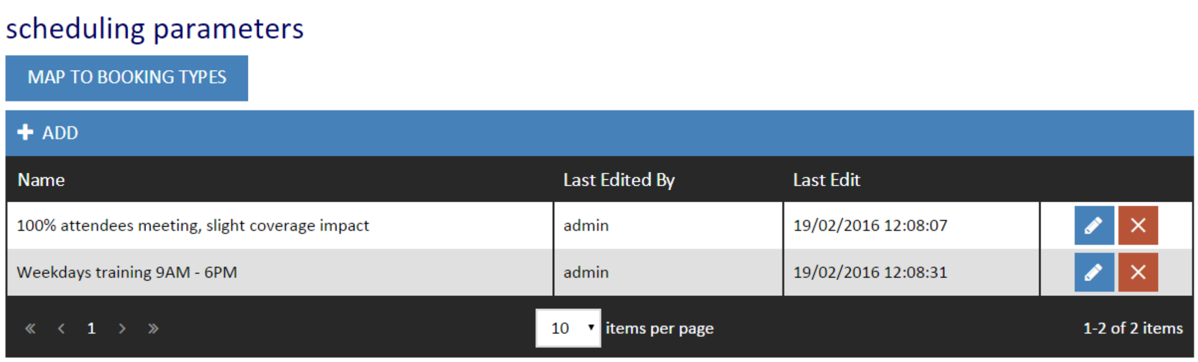

Figure 27: Scheduling parameters table

There are additional controls at the bottom of the table for pagination and a choice of how many items are displayed per page.

Click the **Add** button in the top left of the table to create a new scheduling parameters template.

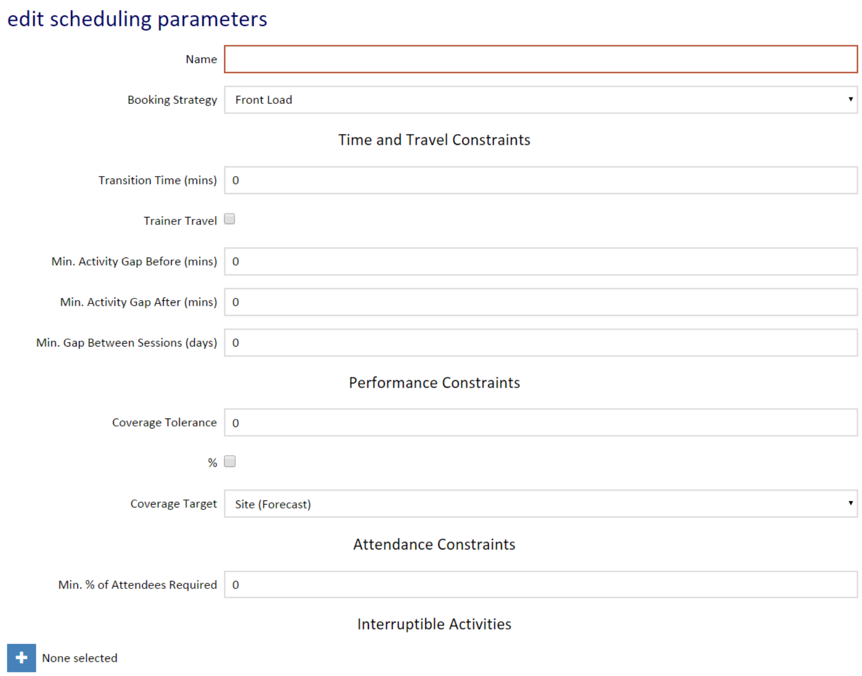

Figure 28: Create/edit scheduling parameters screen

The top of the edit scheduling parameters screen includes options for setting the template's name, booking strategy, transition time, trainer travel, minimum gap options, coverage tolerance (as a value or percentage) and coverage type options.

The Interruptible Activities list (click the + symbol to expand it) contains all the activities reported by the WFM system that Portal is configured to interface with (this is configured through the Training Manager application). The groups of Interruptible Activities available will vary depending on your WFM system.

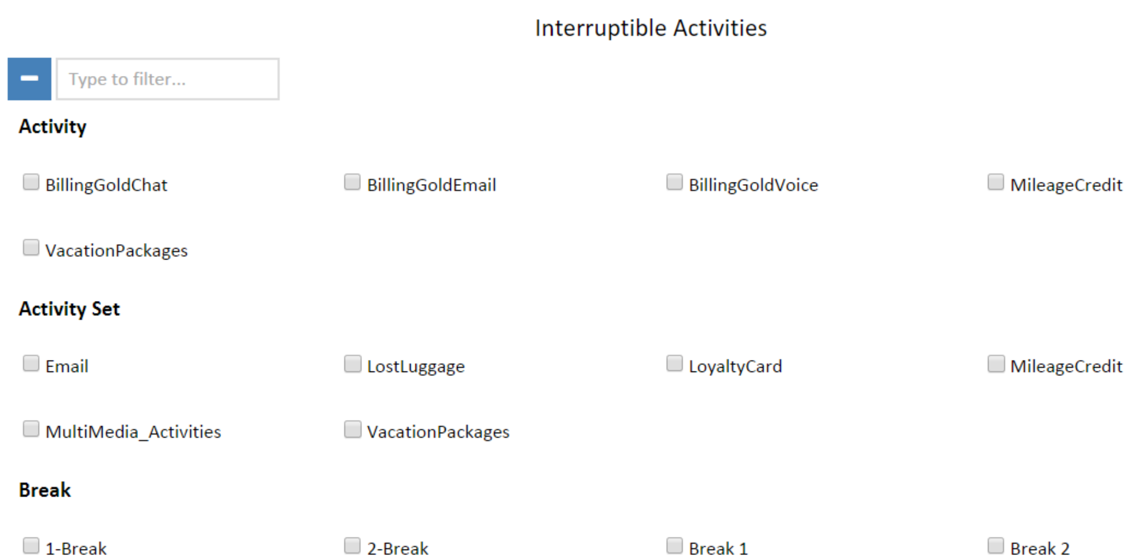

Figure 29: Expanded list of interruptible activities

Typing into the "Type to filter…" box at the top of the list will restrict the view to only show selected Interruptible Activities, plus those whose names contain the letters you typed.

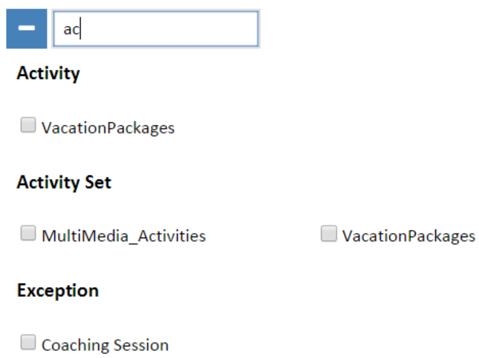

Figure 30: Filtered list of interruptible activities

You can select activities in the following ways:

- Clicking on the name of an Interruptible Activity will highlight it.
- Holding the **Shift** key and clicking on the name of an Interruptible Activity will highlight all the Interruptible Activities between the last one you highlighted and the current one.
- Holding the **Ctrl** key and clicking on the name of an Interruptible Activity will toggle the highlighted status of the Interruptible Activity you are clicking on.
- Clicking on the box next to the Interruptible Activity name will select / deselect:
    - All highlighted Interruptible Activities, if any are highlighted
    - Just the one you ticked if none are highlighted.

Clicking the - symbol to the left of the filter box will collapse the list again, showing you just the names of the Interruptible Activities you selected.

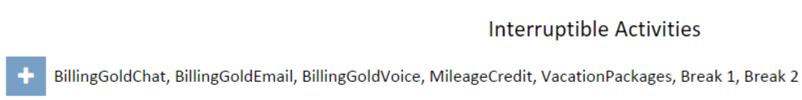

Figure 31: Collapsed list of interruptible activities, with some selected.

The bottom of the screen includes options for setting working hours for the template as shown below.

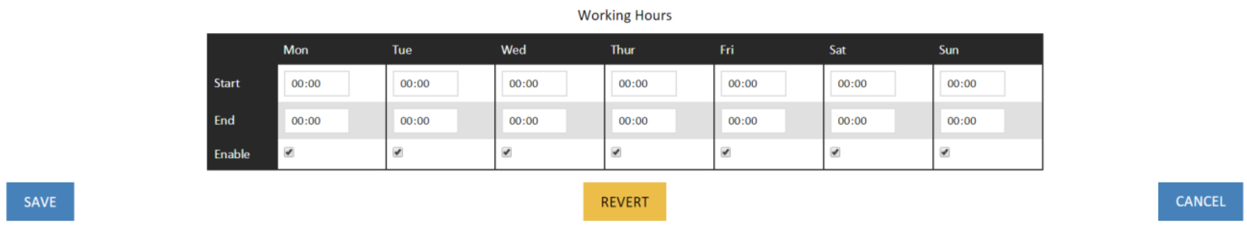

Figure 32: Working hours table

Once you've defined the settings for the new scheduling parameters template, click the **Save** button. If you are editing an existing template and wish to reload the screen without applying changes, click the **Revert** button. Clicking the **Cancel** button causes all unsaved changes to be lost and returns the user to the table of saved scheduling parameters templates.

7.1.1 Mapping Scheduling Parameters to Booking Types

Once you have created some scheduling parameters (either via Portal or Training Manager), these can be mapped to booking types via the **Map to Booking Types** screen. This screen is accessible by clicking the **Map to Booking Types** button in the top left of the **Scheduling Parameters** page. The screen includes a table listing the active booking types (for training and meetings), a dropdown next to each one for setting the scheduling parameters, a tickbox to set whether the booking type is enabled, and control for setting locations. The dropdown can be used to select the set of scheduling parameters that should be used for each booking type. The location control allows administrators to restrict which booking types are allowed to be used by trainers and managers based on location. Ticking locations in this control for a specific booking type will allow managers and trainers who work in that location to use that booking type.

Notes:

- Administrators are able to select any booking type when requesting a booking through Portal.
- If a manager or trainer has no locations assigned to them then they cannot see any booking types, even ones that are assigned to all locations.
- If a manager has a parent location selected (e.g. London) then they are treated as having all of its sub-locations selected (i.e. Docklands, Stratford and Westminster) for the purposes of determining which booking types they can see.
- If a manager is in a sub-location of one that is selected as available, they should have access to that booking type (e.g. a manager in London would have access to a booking type restricted to UK)

The table includes paging controls that allow for the selection of how many items appear in the table per page and controls for moving between pages.

There is also a tick box in each row to enable or disable the booking type within Portal Booking Requests.

The bottom of the screen includes Save, Revert and Cancel buttons. The Save button applies any changes that have been made and returns to the user to the **Scheduling Parameters** page. The **Revert** button causes any unsaved changes to be lost whilst remaining on the same page. The **Cancel** button loses any unsaved changes and returns the user to the **Scheduling Parameters** page.

Restricting Report Results

8 System Settings

Portal includes a System Settings screen for specifying additional settings.

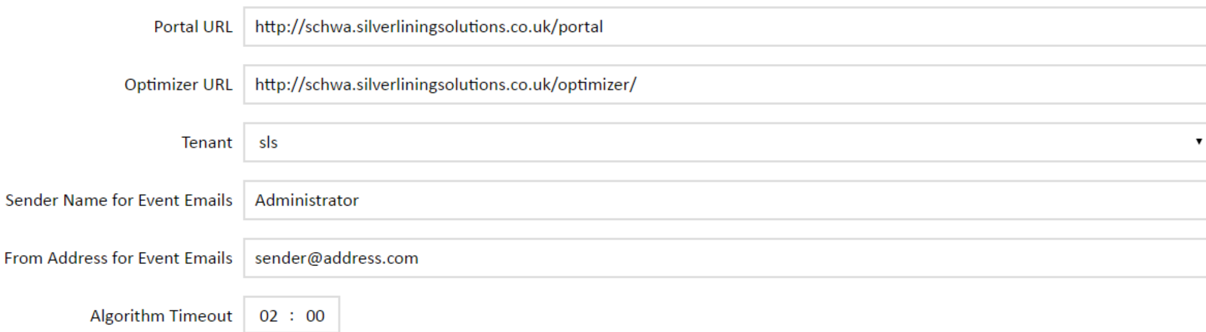

Figure 21: View Booking Requests

The Portal URL is used to set the URL to Portal that is included with email notifications.

The Optimizer URL and Tenant drop-down are used to configure the connection between Training Manager and Skills Assessor tenant.

The **Sender name for Event Emails** and **From Address for Event Emails** are used in email notifications.

The **Algorithm Timeout** setting specifies the limit for algorithm runs, after which the search for sessions will be cancelled.