Training Manager Web Portal 8.5.648

Manager User Guide

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Contents

1 Overview

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

The Portal provides access to view any training, 1-2-1's or meetings that have been scheduled for the manager.

The training roadmap for any scheduled training activity is also visible.

2 Portal Manager

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

After selecting the relevant working time zone from the drop down box, click on **continue**.

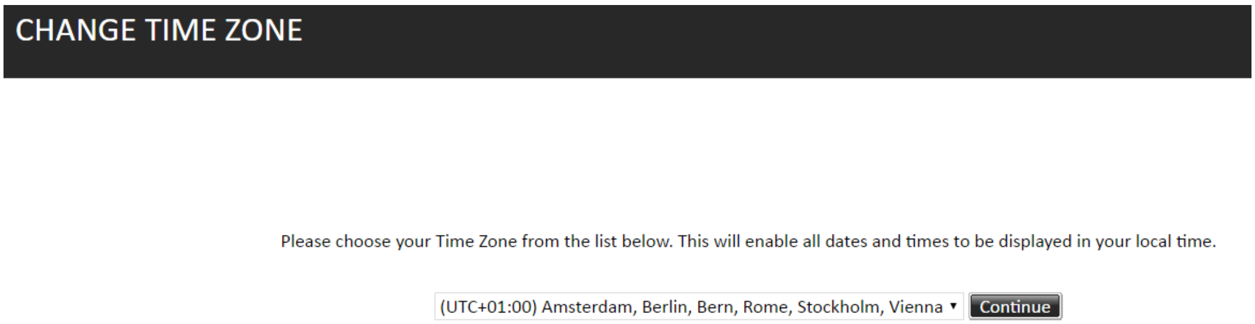


Figure 1: Setting your time zone

The manager has access to:

- manager calendar
- agent calendar
- room calendar
- wall chart
- set your regular working hours
- set exceptions to your regular hours
- change your time zone
- training roadmap

The option to log out is available from the bottom of the menu.

Training details will only be visible in the portal if training sessions have already been created and are live Training Manager.

3 Manager Calendar

Clicking **manager calendar** on the home page will present any scheduled activity in the **Training Manager View**. This will include any team meetings, one-to-ones, or other activity that has been either scheduled in Training Manager or entered manually in Training Manager.

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

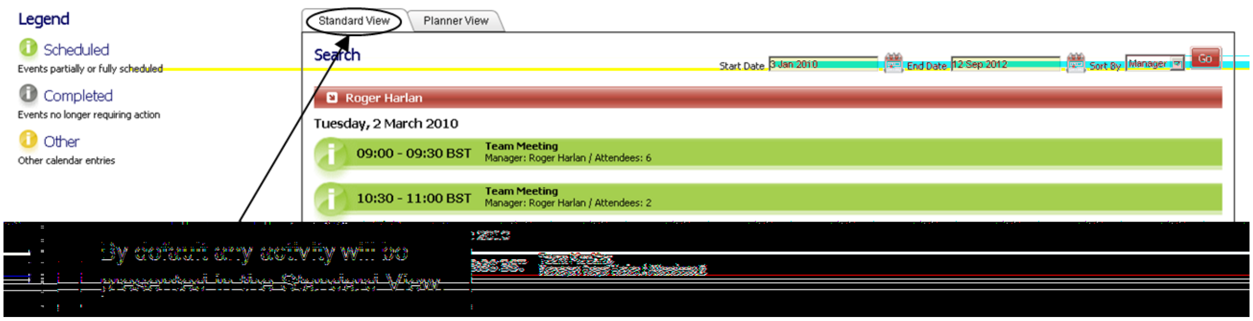


Figure 2: Manager calendar navigation

Clicking on one of the schedule bars will reveal any details associated with that scheduled item.

In the following example this is a team meeting and the agents that have also been scheduled are presented in a list.

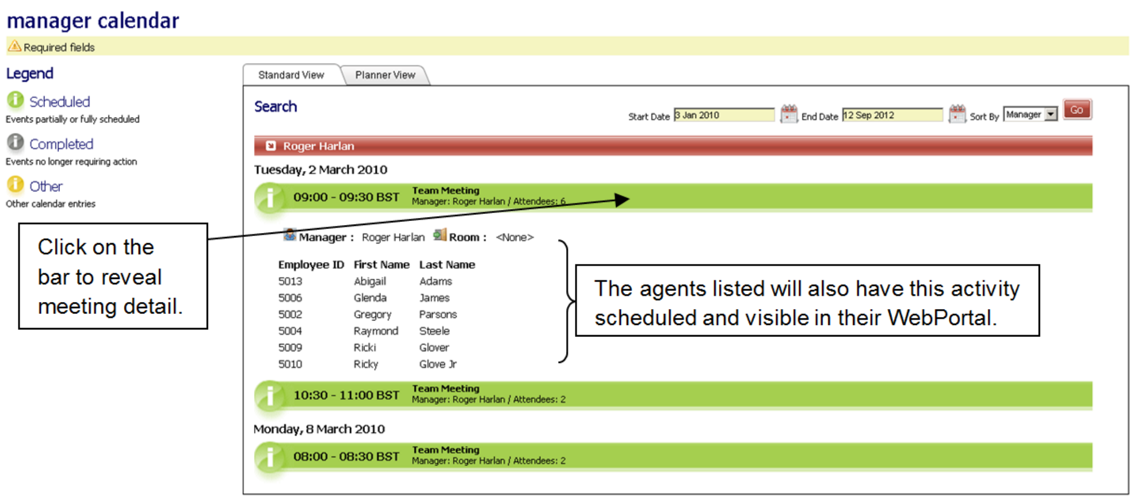


Figure 3: Viewing additional event detail

Clicking the **Training Manager View** tab will present a calendar view of any scheduled activity, as shown in the following example. The Training Manager view can be displayed by day, week, or month, as required.

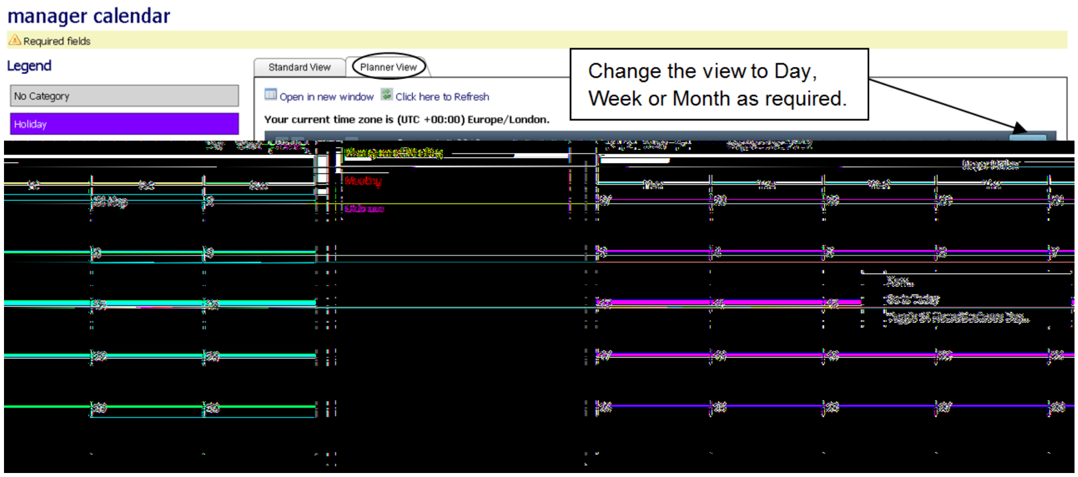


Figure 4: Using the Training Manager view tab

Each event is color-coded, as explained in the legend on the left side of the screen.

Training Manager will schedule team meetings and one-to-ones based on the agents' scheduled activity in WFM together with their manager's availability; the manager therefore has to keep his or her availability up to date in their Portal.

In the **Training Manager View** tab, the manager can enter any non-availability time which Training Manager will take into account when scheduling any activity.

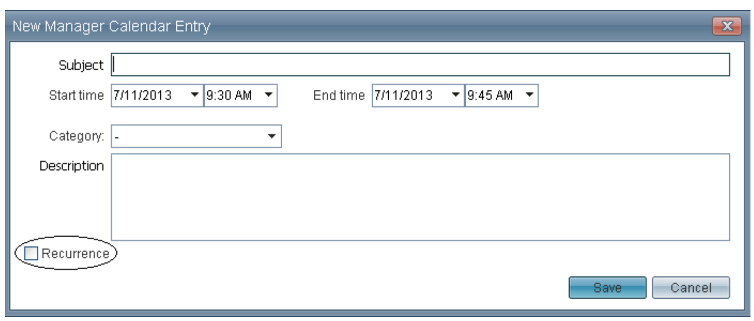


Figure 5: Defining non-availability time

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

- **New**
- **Go to Today** – Selecting this will take the Training Manager view to the current date.
- **Toggle 24 Hours/Business Day** – Selecting this will present the Training Manager view in a 24-hour view.

For example, to enter a holiday, select **New**.
The **New Manager Calendar Entry** dialog box is then displayed.
Enter details in **the Subject** box, and complete the **Start time** and **End time** boxes if the entry is for a single day.

Select a category in the drop-down list. (Categories are colour-coded, as explained in the key on the left side of the screen.)

To create an entry for multiple days, select the **Recurrence** check box.

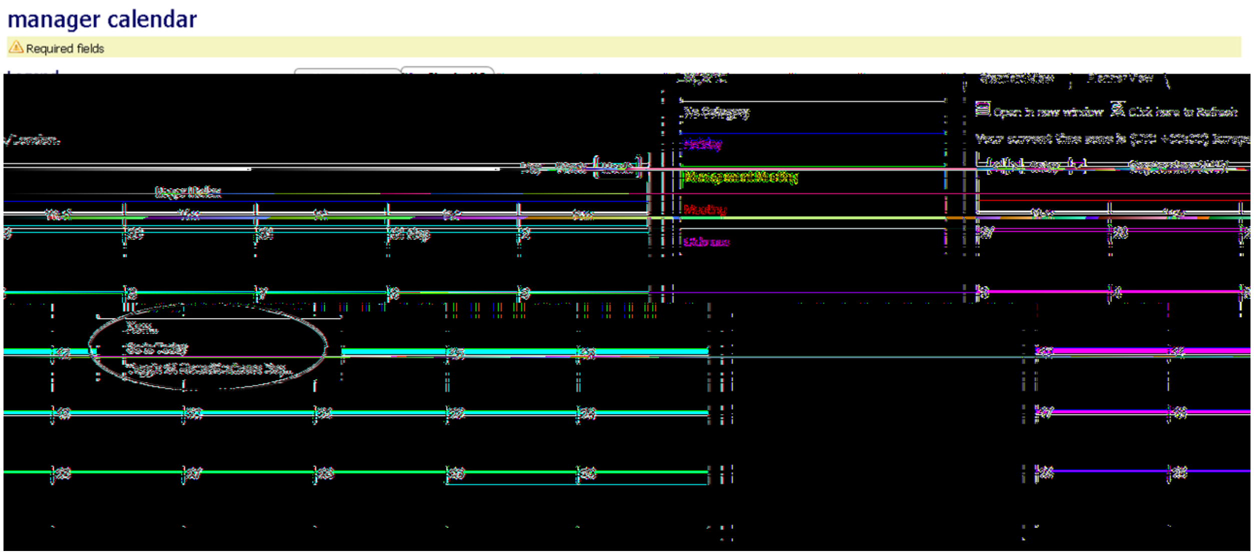


Figure 6: Setting the recurrence option

For multiple-day entries, use the **Recurrence** option to create individual events on the **Standard View** tab.

In the following example, a two-day holiday is being entered into the manager's calendar. The start time is 05/09/2012 at 08:30, and the end time is 05/09/2012 at 17:00. This will then create two separate holiday entries on the standard view.

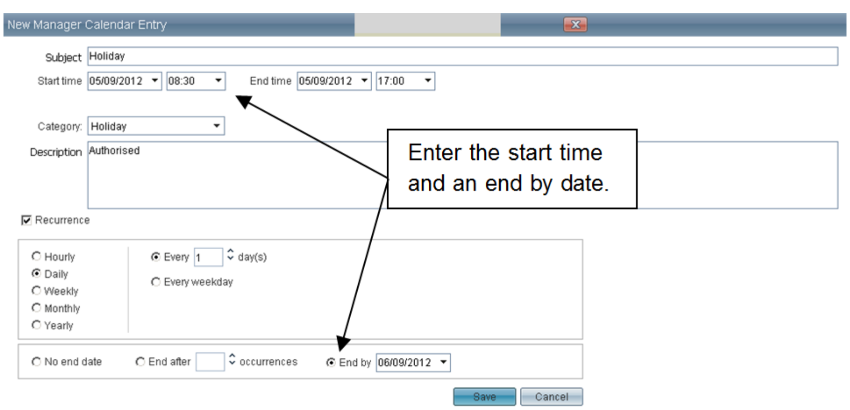


Figure 7: Creating a new manager calendar entry

Select the relevant category in the drop-down list. This will display the entry with the associated name and colour-coding for easy visibility. (The categories are created in Training Manager.)

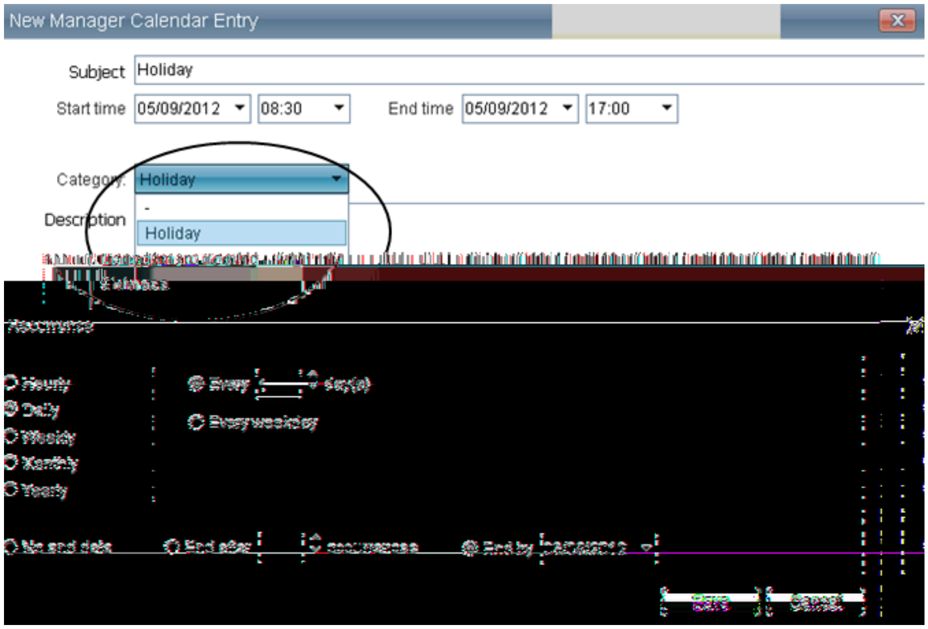


Figure 8: Setting a category for the new calendar entry

After you select the **Recurrence** check box, the recurrence options become available. In this example, because the entry is for two days, **Daily** has been selected together with an end date. If weekends are to be excluded select **Every weekday**.

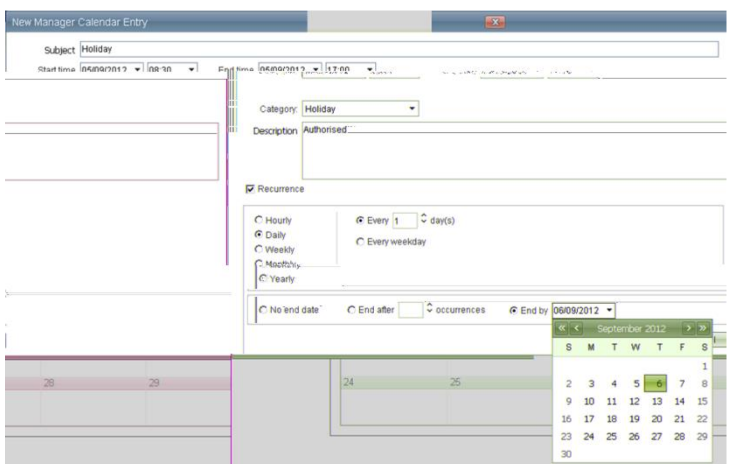


Figure 9: Setting additional recurrence options

Click **Save** when all of the details have been entered and the event will then appear in the manager calendar.

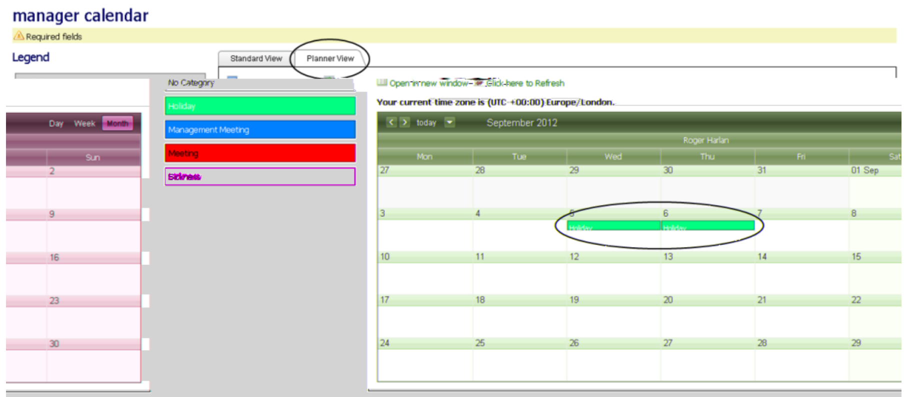


Figure 10: Display of the new event

The event will also appear on the **Standard View** tab as an entry for each date.

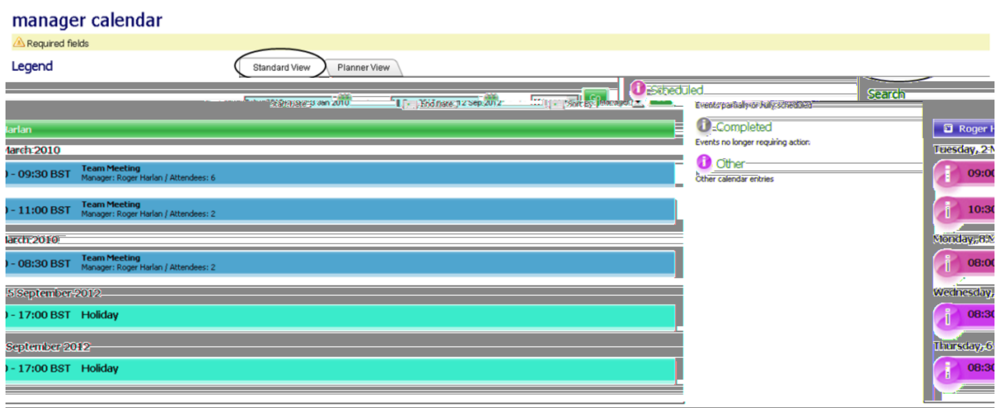


Figure 11: Display of the new event in the standard view

To edit an existing entry—and only events created on the **Training Manager View** tab can be changed—right-click on the entry and this will present three options:

- **Edit** – Change the original entry either by individual date or by the complete set of multiple dates.
- **Delete** – Delete the individual date.
- **Delete Future Occurrences** – Delete the multiple dates associated with the entry.

Select the appropriate option.

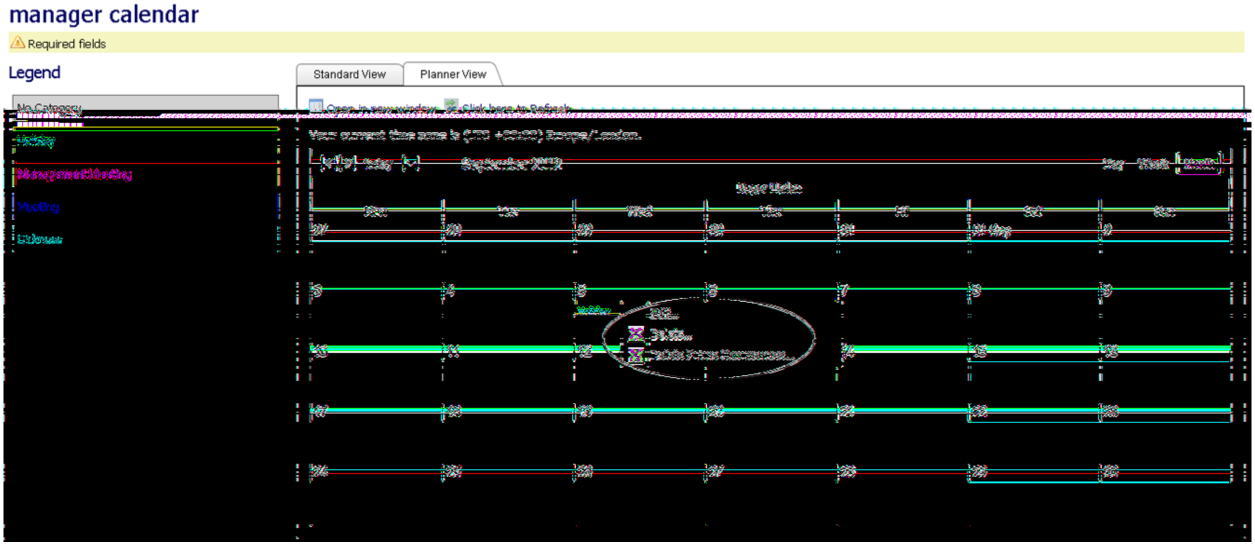


Figure 12: Editing an existing entry

In this example, **Edit** has been selected, which presents two further options:

- **Edit only this occurrence** – Edit the individual date.
- **Edit the series** – Edit the complete set of multiple dates.

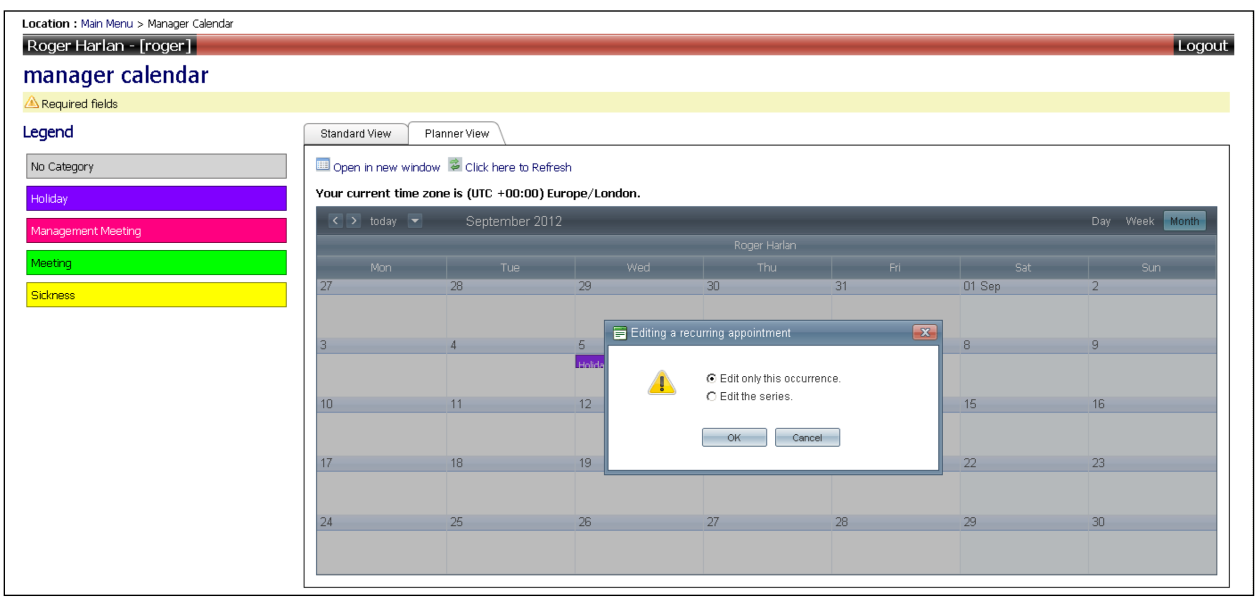


Figure 13: Options for editing an existing entry

4 Agent Calendar

Clicking **agent calendar** from the menu will display a list of agents that the manager has access to.

The list of agent names is presented in the bottom-left corner of the screen. The list of agents will be managed automatically if there has been integration with an internal company data source, or this will be manually managed by the Portal Administrator).

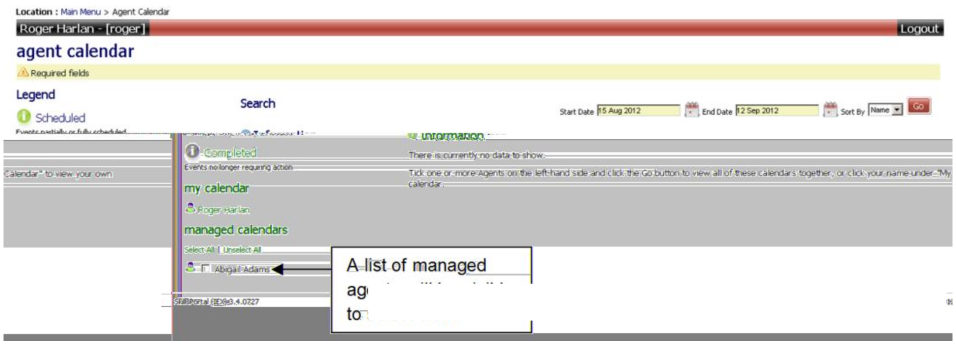


Figure 14: Display of managed agents

Selecting agents and then clicking **Go** will automatically list the agents' training activity within the specified date range.

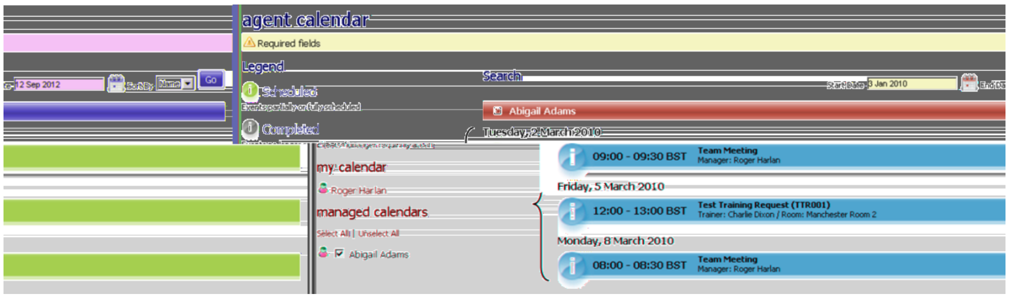


Figure 15: Display of agents' training activities

Clicking one of the training session bars will expand the bar to reveal the trainer, the room, and any session details. The training status is colour-coded, as explained in the legend on the left side of the screen.

Figure 16: Viewing additional event detail

The option to view scheduled activity for all of the agents is available by clicking **Select All**.

This option allows the manager to view all of the team's scheduled activity. The information is presented in a view similar to the preceding example, with all of the scheduled training activity listed down the right side of the screen.

5 Room Calendar

The manager also has the option to view the training activity by individual room, by clicking **room calendar** from the menu.

A list of all of the locations is displayed in the bottom-left corner of the screen.

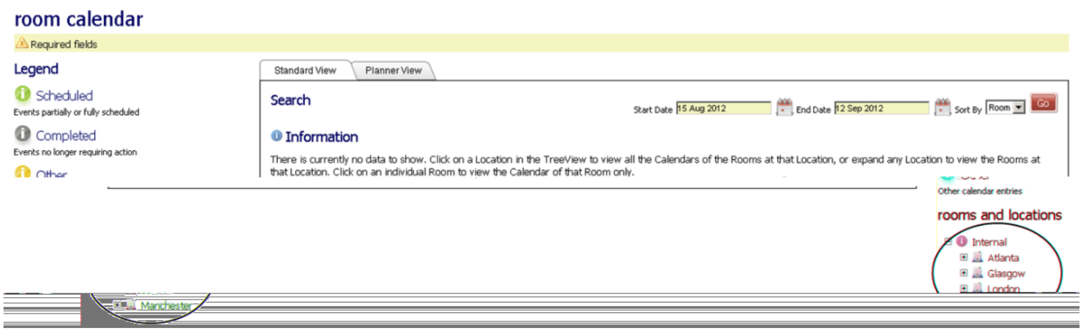


Figure 17: Display of rooms and locations

Expand a location to reveal the individual rooms.

Figure 18: Viewing additional location detail

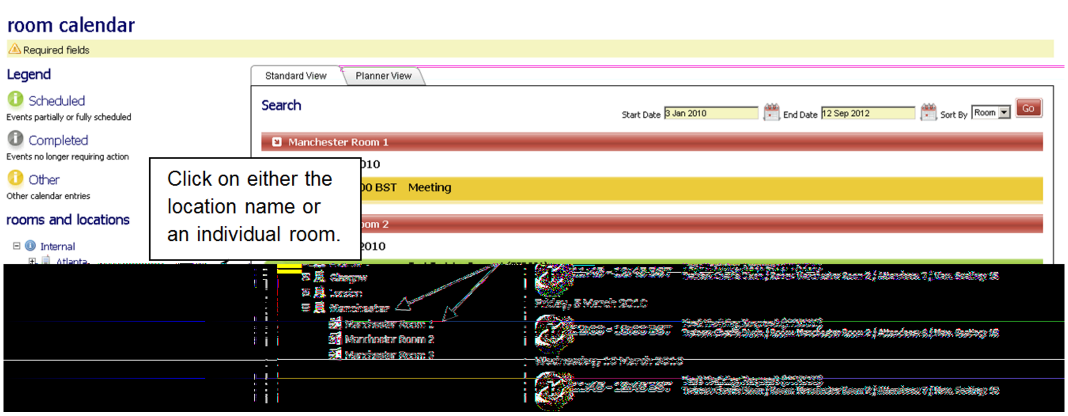


Figure 19: Selecting rooms and locations

Select either the location or an individual room, adjust the date range if required, and then click **Go** to view the details.

Click one of the training session bars to display the training activity, as shown in the following example.

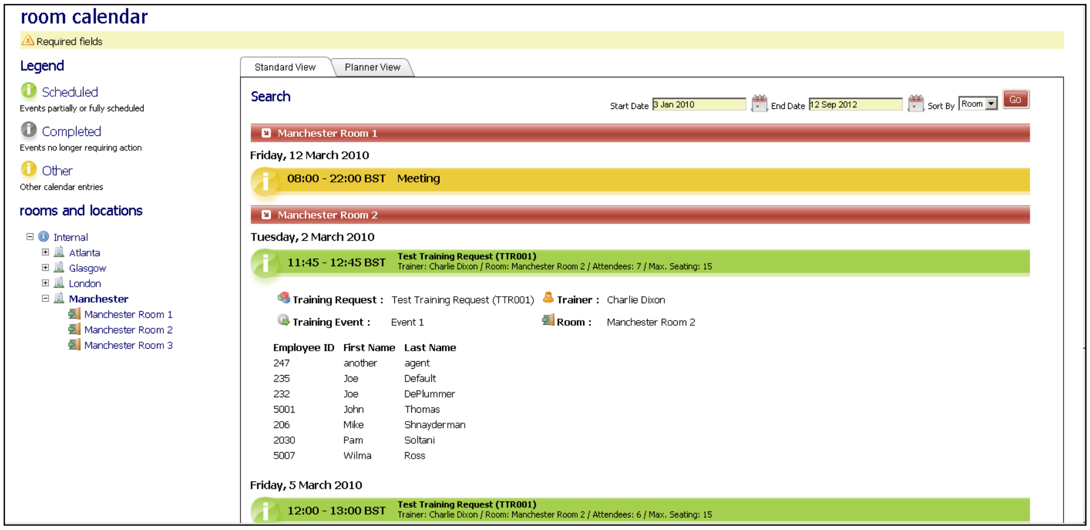


Figure 20: Viewing additional activity information

If a room has been mapped to an Exchange room, any appointments entered directly into the Exchange calendar for that room will also be shown in the list as “Other” items, and on the Training Manager view as “No Category” items.

6 Request Booking in Portal

6.1 Request Booking

Portal allows managers and trainers to request a training course or meeting for a group of users. This feature allows users to create a booking request for a specific date range and provide a list of users who should be scheduled for the booking. The completed booking request will then appear within 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 **Booking Requests -> Request Booking**.

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

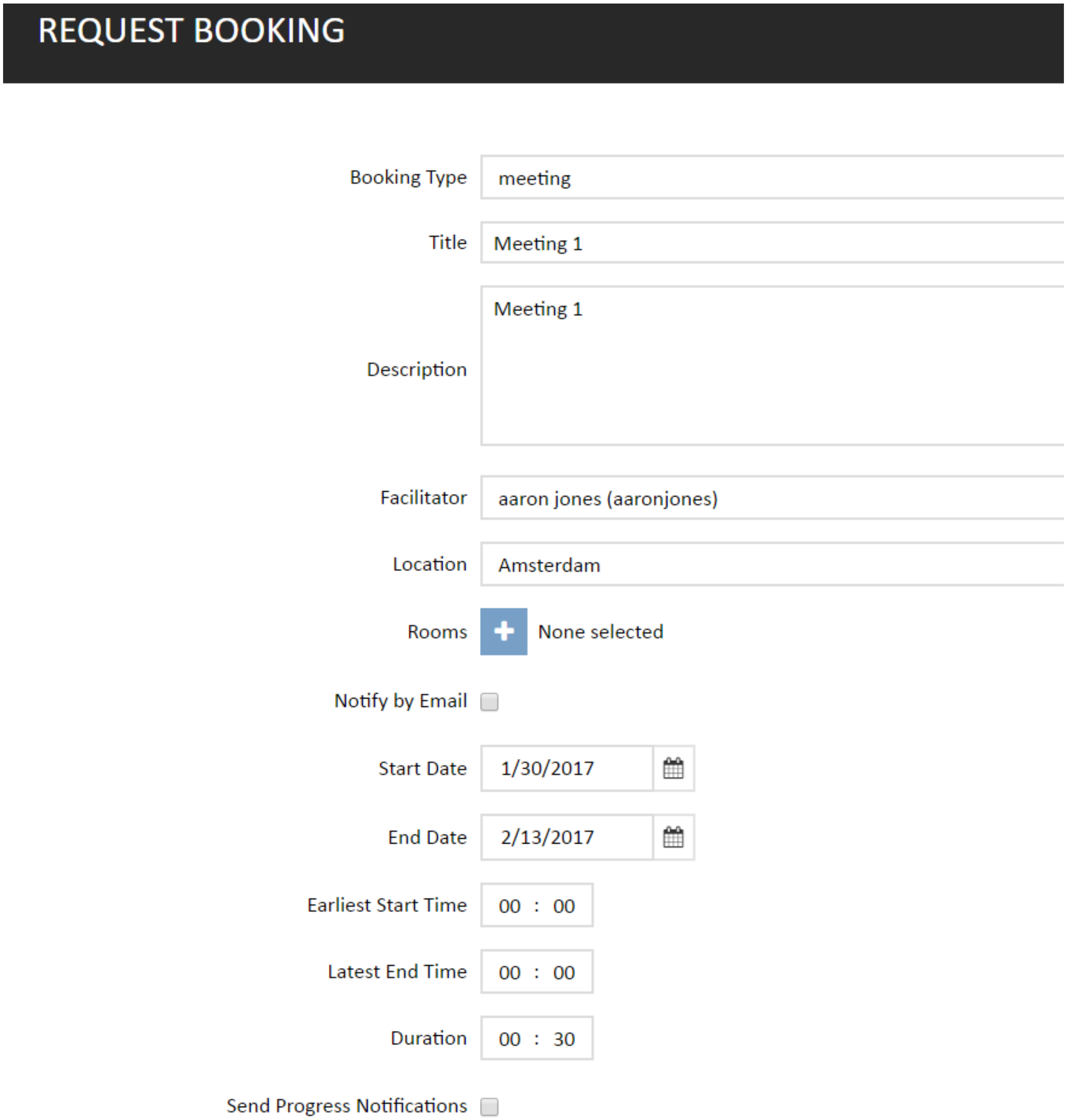


Figure 21: Request Booking Form

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. Once a location has been specified, it is possible to select rooms from that location to be used for the booking (this is optional). 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 minimum and maximum number of attendees options can be used to restrict the session search to just those sessions that meet the minimum and maximum number of users criteria.

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.

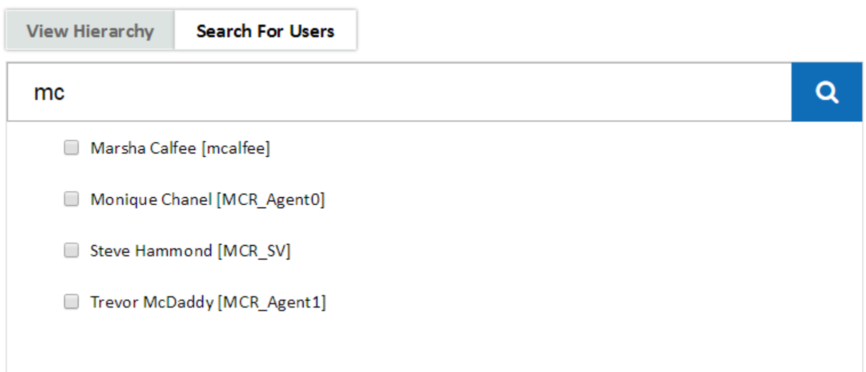


Figure 22: Selecting users from the WFM hierarchy

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 their checkboxes in 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 where all of the search terms are present in the first name, last name and/or employee Id. The search feature is not case sensitive.

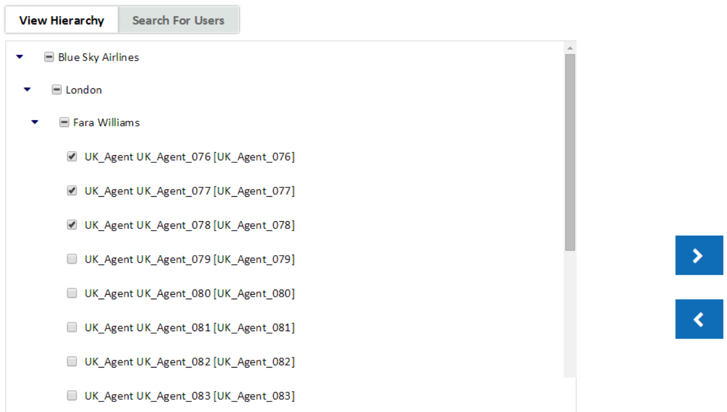


Figure 23: Searching for users

As with the **View Hierarchy** mode, users can be added to the training request by ticking their 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 as normal.

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.

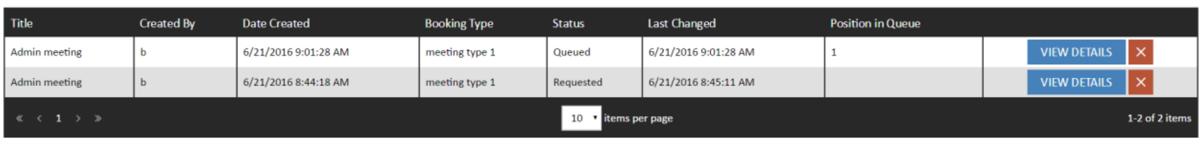
6.2 Viewing Booking Requests

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.



Title	Created By	Date Created	Booking Type	Status	Last Changed	Position in Queue	
Admin meeting	b	6/21/2016 9:01:28 AM	meeting type 1	Queued	6/21/2016 9:01:28 AM	1	VIEW DETAILS ✕
Admin meeting	b	6/21/2016 8:44:18 AM	meeting type 1	Requested	6/21/2016 8:45:11 AM		VIEW DETAILS ✕

« ‹ 1 › » 10 items per page 1-2 of 2 items

Figure 24: View Booking Requests

6.3 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.

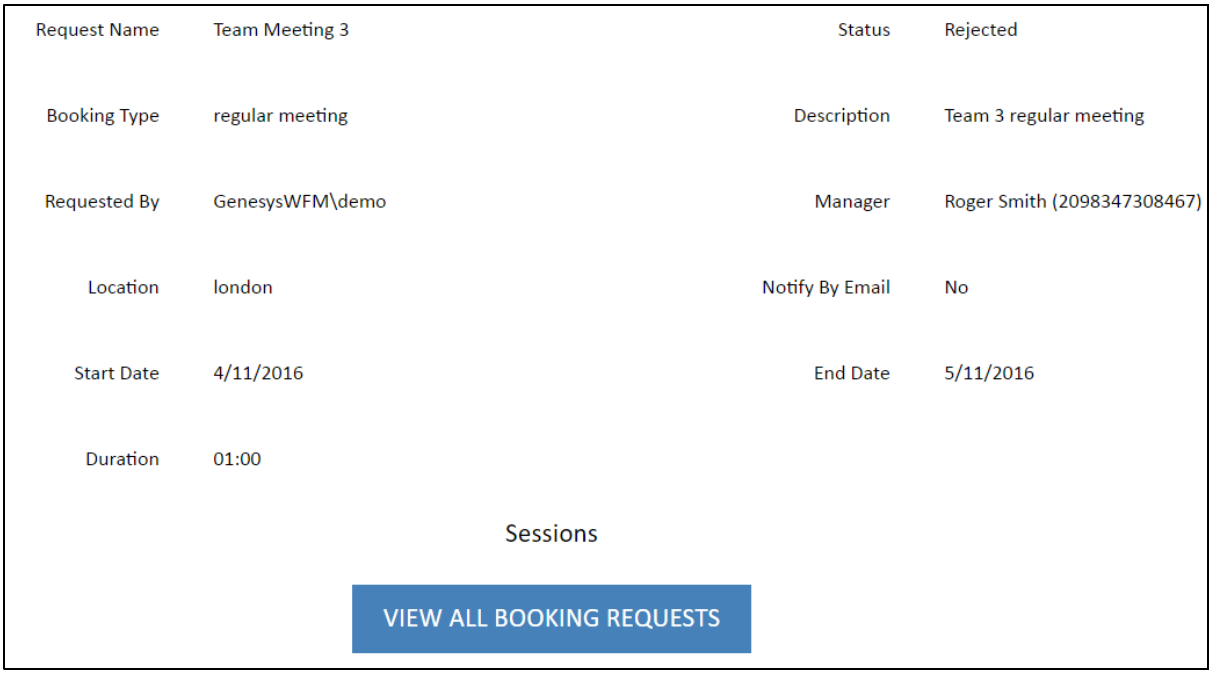


Figure 25 - View Booking Details

7 Training Roadmap

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

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 key 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 21: Training roadmap display and filtering options

8 Set Your Regular Working Hours

To be able to schedule team meetings and one-to-ones, Training Manager needs to have information about the manager's availability and working hours. (The scheduled hours of agents who report to the manager are taken directly from WFM.)

Click **set Working Day Defaults** from the menu to set your default working hours. This will present the default hours, as shown in the following example. In this example, the manager does not work Saturday or Sunday, and therefore these days are not selected and are highlighted.

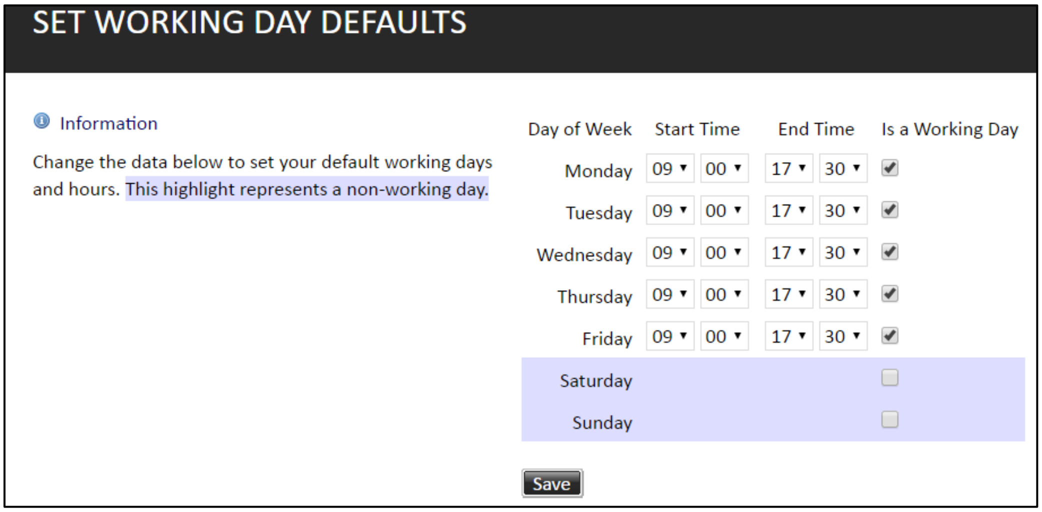


Figure 22: Set your regular working hours

To change the default hours, use the drop-down list to select the required time. To change the working days, either select or clear the days by using the check box on the right side, under Is a working day.

These default working hours are used on the **Set Working Days** screen in the next section.

9 Set Exceptions to Your Regular Hours

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

Any changes to the manager's regular hours can be made by clicking **Set Working Days** from the menu.

In the following example, weekends are identified as non-working days for the manager by default, as specified on the **Set Working Day Defaults** screen in the last section.

Note: Any freeze periods are controlled within Training Manager. In the example below no changes are allowed as the dates are unavailable.

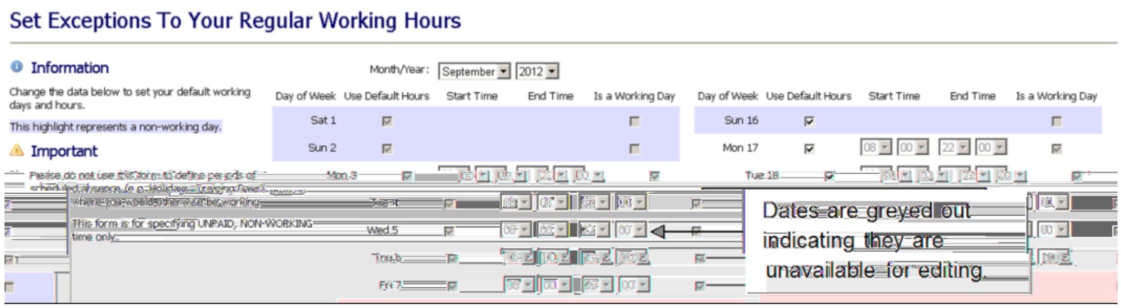


Figure 23: Setting exceptions to your regular working hours

To make any changes, clear the **Use default hours** check box for the required date to indicate that the hours are not the default working hours.

Change the hours by using the drop-down list to select the required hours.

Leave the **Is a working day** check box selected, and Training Manager will use these changed hours when scheduling any activity on that date.

This procedure should not be used to change hours because of holidays. It is only used when the manager is working hours that differ from his or her normal working hours.

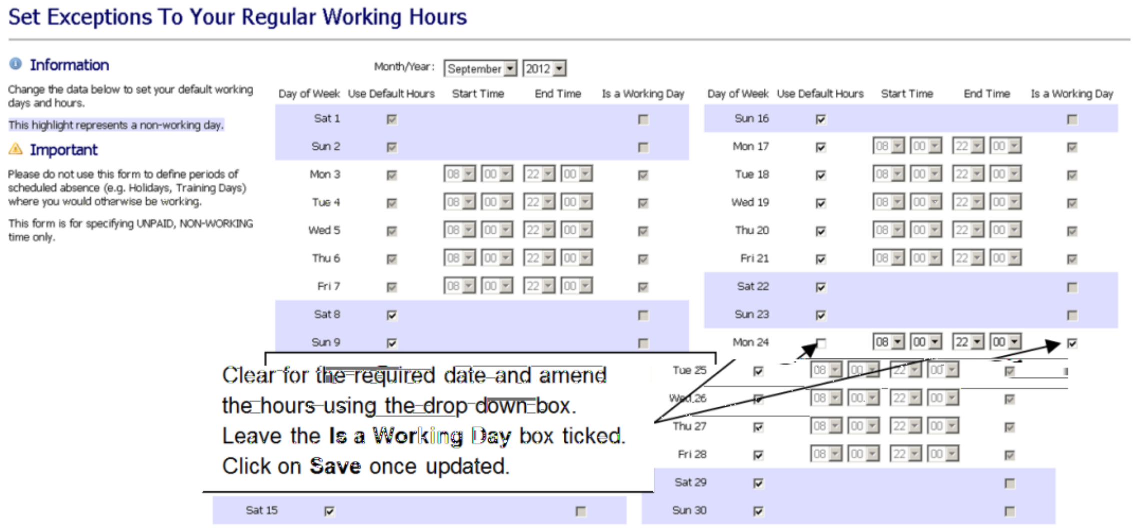


Figure 24: Setting exceptions to your regular working hours

10 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.

11 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
- 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

The wall chart screens can be configured to only show business hours by specifying the business hours in the Portal System Settings page. 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.

The colours used by the wallchart view will differ depending on which viewing option has been selected. If timeline views are selected, the colours used to display items in the wallchart will match the items in the item selection tree on the left of the page. If any of the non-timeline viewing modes are selected, the colours used will match the items' booking categories. The legend above the wallchart can be expanded to show which colours are related to which booking categories.

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**.

If a room has been mapped to an Exchange room, any appointments entered directly into the Exchange calendar for that room will also be included in the data shown on the Wall Chart view.