Genesys

Genesys Training Manager 8.1.1

Web Portal Agent Guide

About Genesys

About Genesys

Genesys is the world's leading provider of customer service and contact center software - with more than 4,000 customers in 80 countries. Drawing on its more than 20 years of customer service innovation and experience, Genesys is uniquely positioned to help companies bring their people, insights and customer channels together to effectively drive today's customer conversation. Genesys software directs more than 100 million interactions every day, maximizing the value of customer engagement and differentiating the experience by driving personalization and multi-channel customer service - and extending customer service across the enterprise to optimize processes and the performance of customer-facing employees. Go to www.genesyslab.com for more information.

Each product has its own documentation for online viewing at the Genesys Technical Support website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

Notice

Although reasonable effort is made to ensure that the information in this document is complete and accurate at the time of release, Genesys Telecommunications Laboratories, Inc. cannot assume responsibility for any existing errors. Changes and/or corrections to the information contained in this document may be incorporated in future versions.

Your Responsibility for Your System's Security

You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.

Trademarks

The Crystal monospace font is used by permission of Software Renovation Corporation, www.SoftwareRenovation.com.

Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

Ordering and Licensing Information

Complete information on ordering and licensing Genesys products can be found in the ***Genesys 7 Licensing Guide***.

 Released by: **Genesys Telecommunications Laboratories, Inc.** www.genesyslab.com

Document Version : 81_trainingmgr_agent_08-2012_v8.1.101.00

Table of Contents

Table of Contents

Preface

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

Access has been provided for agents to view the training that has been scheduled for them, together with the trainer, room, and reason for the training.

This document is valid only for the 8.1.1 releases of this product.

Note:	For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at `orderman@genesyslab.com`.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on .

About Genesys Training Manager

Genesys Training Manager enables companies to create, manage, and schedule multiple agent training activities, team meetings, and one-on-ones automatically in Genesys WorkForce Management (WFM). The training scheduling process can include rooms and trainers, or any combination of agent, room, and training. 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, it describes the reason for the training, the room, the identity of the trainer, any pre-training work of the manager, and who attended. If there were any non-attendees, these can be "mopped up" automatically as part of the scheduling process.

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`.

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.

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.

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.

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

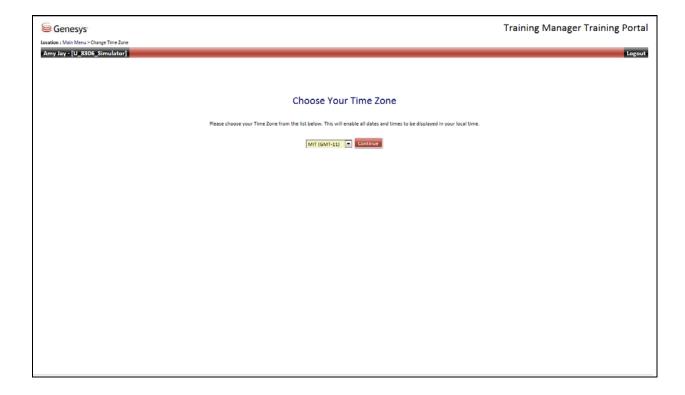| Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession.
Monospace font (Looks like `teletype` or `typewriter text`)	All programming identifiers and GUI elements. This convention includes: • The *names* of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.	Select the `Show variables on screen` check box. In the `Operand` text box, enter your formula. Click `OK` to exit the `Properties` dialog box. T-Server distributes the error messages in `EventError` events. If you select `true` for the `inbound-bsns-calls` option, all established inbound calls on a local agent are considered business calls. Enter `exit` on the command line.

Web Portal Agent

The Agent

When the agent logs on to the system the first time, he or she will be presented with a screen to select their working time zone.

Use the drop down box to select the correct time zone and then click on `Continue`.

The agent will then be presented with a home page view similar to the following example.

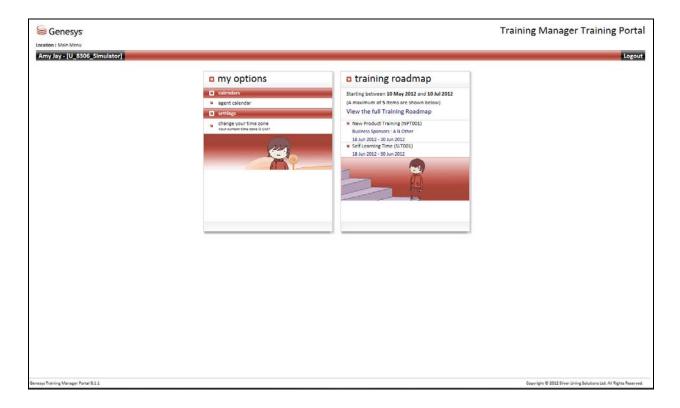The agent has access to:

- agent calendar

- training roadmap

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

Details of any training sessions will only be visible in the portal if the advisor has scheduled training in Training Manager and this has been approved.

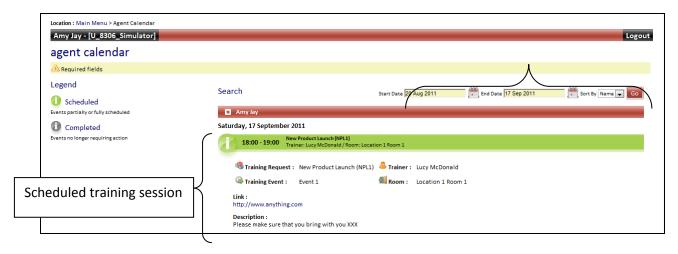The agent can also change their time zone on the home page.

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

My Options

Agent Calendar

Clicking agent calendar on the home page will reveal any scheduled training activity. The date range can be altered by using the date filter. The option to log out is available in the top-right corner, and to return to the home page, click `Main Menu` in the top-left corner.
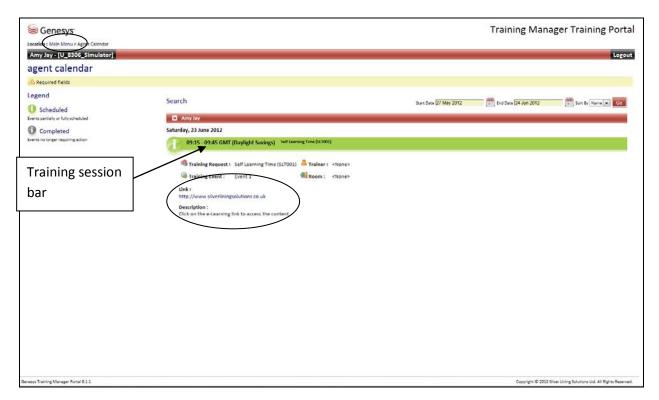

Scheduled training session

Clicking one of the training session bars will reveal the details of the session—for example, the trainer, the location of the room, and any additional notes about the session.

If there is a link to e-learning content, click the link to go directly to the content, without having to navigate the system.

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

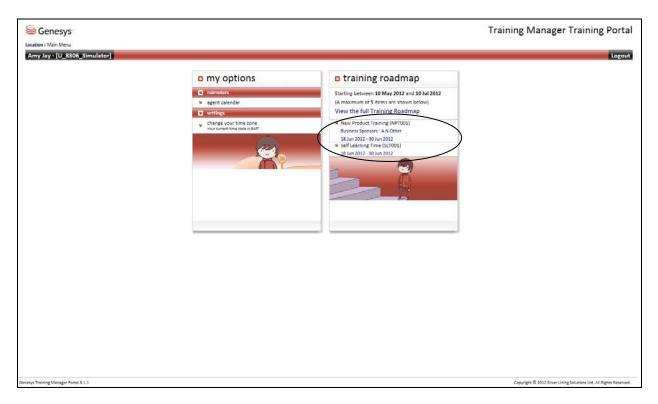Click Main Menu to return to the home page at any time.

After a classroom training session has been completed, each individual's attendance record will be updated by the trainer with the information appearing under Attendance and Completion.

E-learning attendance may also be updated and visible against the scheduled e-learning activity.
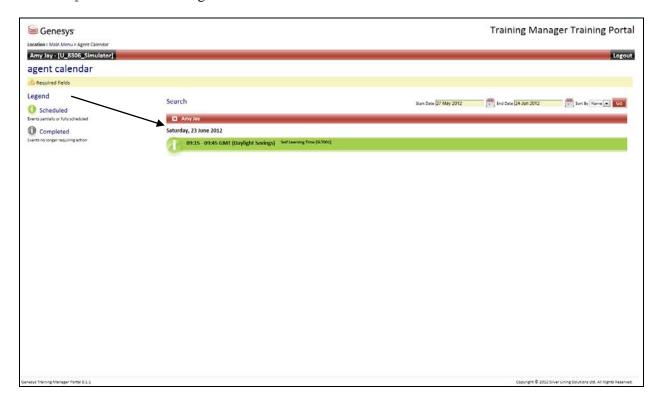
Training Roadmap

The training roadmap is displayed in the right pane of the home page, and the latest training activity is visible in the training roadmap pane.

Click `View the full Training Roadmap` to view all of the training sessions currently scheduled in Training Manager.

The training roadmap is color-coded, based on the status of the training session:

- **Scheduled** – The training session was agreed to.
- **Completed** – The training session was finished.

Click one of the training session bars to reveal any additional details—for example, objectives, additional notes, who the trainer is, and in which room the training is taking place.

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