

**CALABRIO™**

# **Calabrio WFM**

TRAINING PLANNER 9.0

ADMINISTRATORS WEB PORTAL

USER GUIDE



March 2, 2021



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# Overview

Welcome to the *Portal Administrator Guide*. This guide is designed to explain the application in user friendly terms and describe how to navigate the system.

## About the Web 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.

# Web Portal Administrator

## 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.

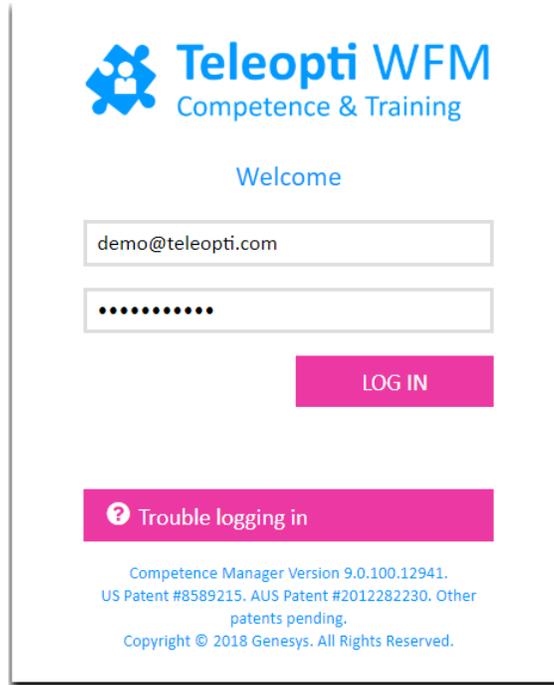


Figure 1: Login screen

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.*

If no time zones are available in the drop-down; start a Training Manager client in order to retrieve the list of timezones from WFM, then login to Portal again.



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



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.

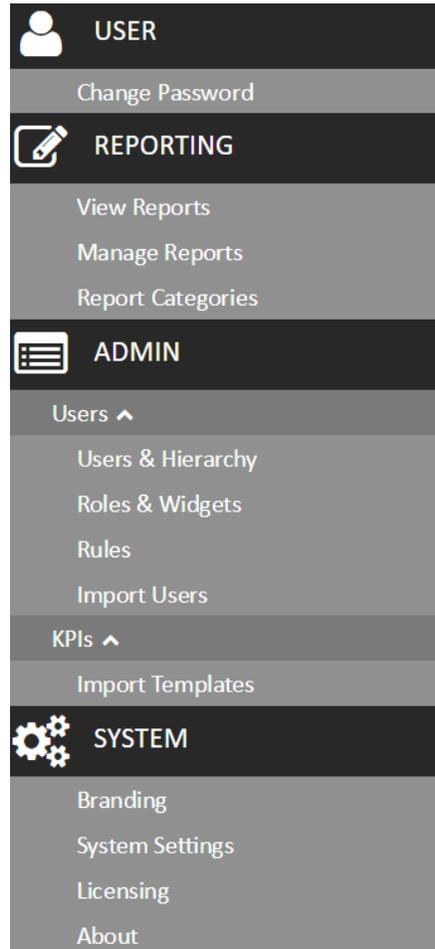


Figure 3: Menu

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:

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

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

You may also have access to Performance DNA widgets if you have a valid Performance DNA licence.

Note: the information shown in the calendar pages is affected by the user's position in the hierarchy, e.g. users viewing other users' calendars will only be able to access information about users directly under them in the Performance DNA user hierarchy.

## 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.

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.

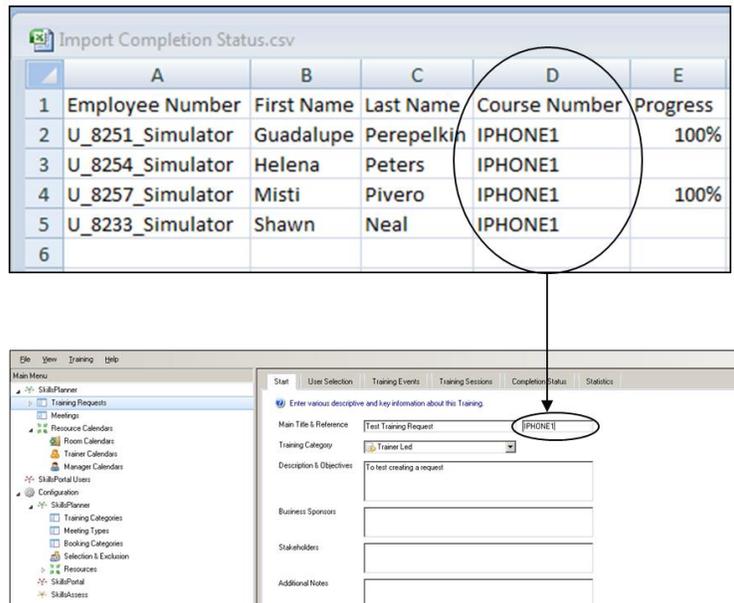


Figure 4: Example CSV import

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.

## IMPORT COMPLETION STATUS

### Note

The CSV file containing your completion status data should contain at least the following columns (in any order):

- Employee Number - this is the Employee ID of the agent
- Course Number - the external course reference
- Progress - 100% for completed e-learning

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

📁

**Information**

Select the CSV file containing your completion status details:

No file chosen

Please choose field separator (Culture default is at top of the list)

▼

Figure 5: Uploading a CSV file

## Web Portal Administrator | Import Completion Status Data

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

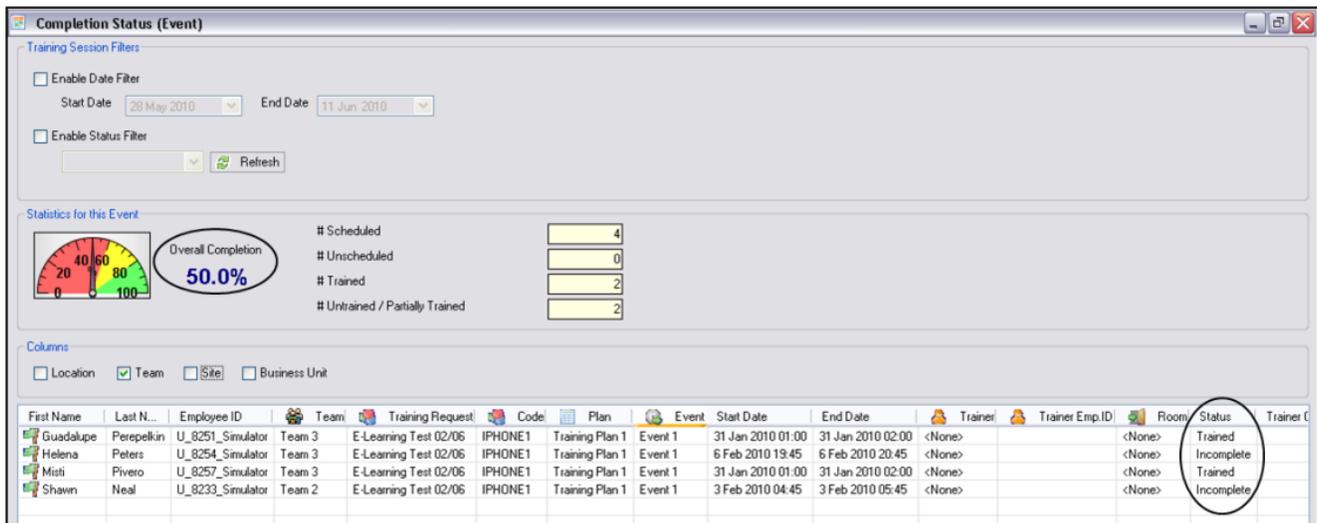


Figure 6: Display of uploaded results

## 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 is 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.

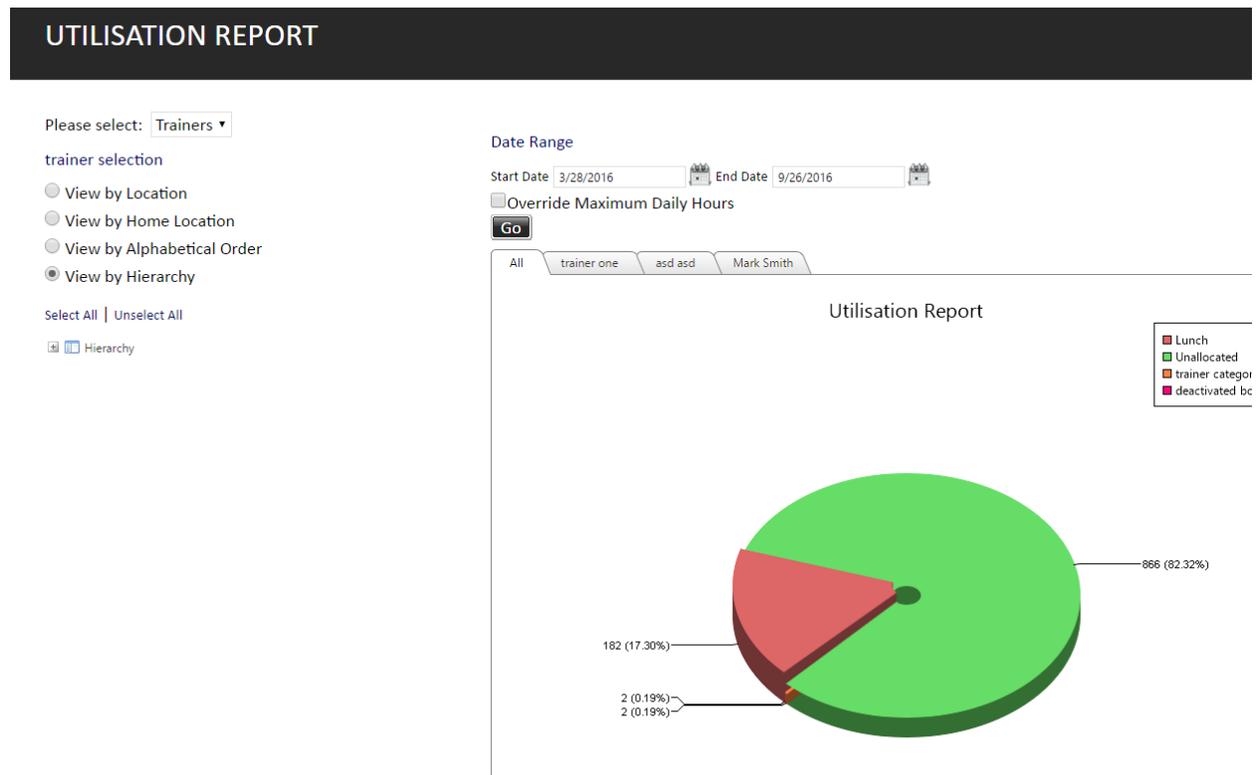


Figure 7: Creating a utilisation report for trainers

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 trainer's 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.

**Date Range**

Start Date   End Date  

**Override Maximum Daily Hours**

Hours per day

Figure 8: 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.

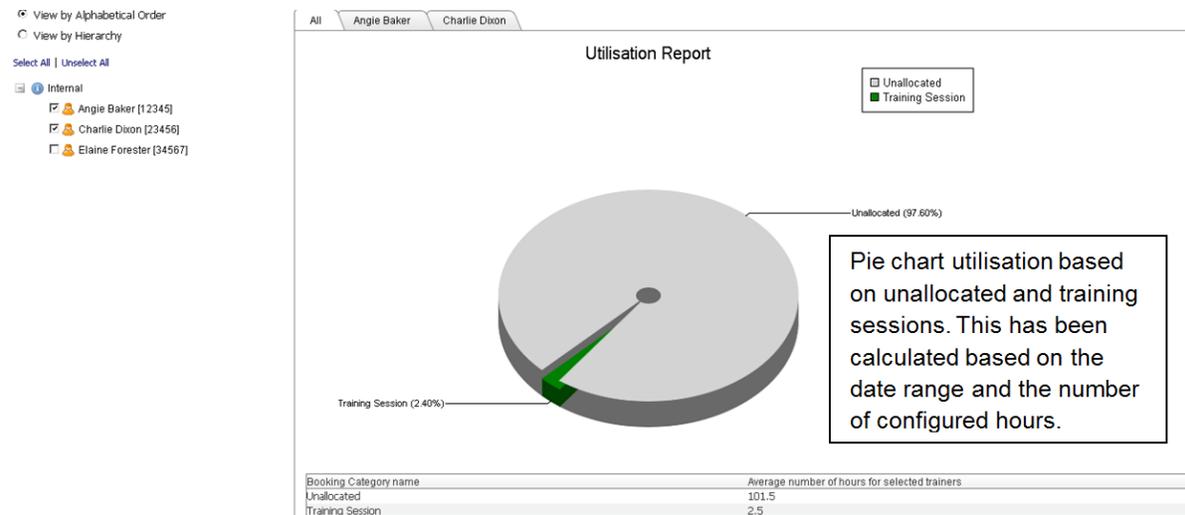


Figure 9: Report display

If a room has been mapped to an Exchange room, any appointments entered directly into the Exchange calendar for that room will also be considered on the utilisation report, and will be shown as “No Category”.

## 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 **Training Roadmap** to view all of the training sessions currently scheduled in Portal.

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.

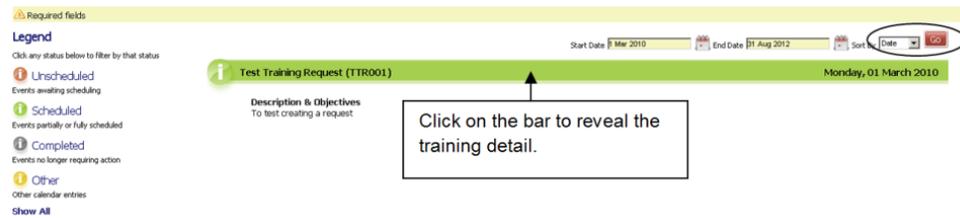


Figure 10: Viewing training detail and filtering results

## 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.

# Request Booking in Portal

## 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.

## REQUEST BOOKING

Booking Type	<input type="text" value="meeting"/>
Title	<input type="text" value="Meeting 1"/>
Description	<input type="text" value="Meeting 1"/>
Facilitator	<input type="text" value="aaron jones (aaronjones)"/>
Location	<input type="text" value="Amsterdam"/>
Rooms	<input type="button" value="+"/> None selected
Notify by Email	<input type="checkbox"/>
Start Date	<input type="text" value="1/30/2017"/> <input type="button" value="📅"/>
End Date	<input type="text" value="2/13/2017"/> <input type="button" value="📅"/>
Earliest Start Time	<input type="text" value="00 : 00"/>
Latest End Time	<input type="text" value="00 : 00"/>
Duration	<input type="text" value="00 : 30"/>
Send Progress Notifications	<input type="checkbox"/>

Figure 11: Request Booking Form

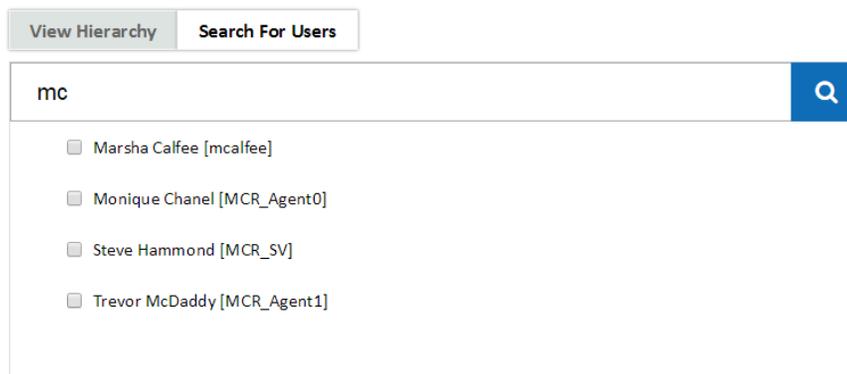
All form fields highlighted red are mandatory fields. Selecting a booking type may provide more mandatory fields or different options depending on the booking type being used. Once a location has been specified, it is possible to select rooms from that location to be used for the booking (this is optional). 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.

## Request Booking in Portal | Request Booking

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.



The screenshot shows a web interface with two tabs: 'View Hierarchy' and 'Search For Users'. The 'Search For Users' tab is active. Below the tabs is a search input field containing the text 'mc' and a magnifying glass icon. Below the search field is a list of four users, each with a checkbox and their name followed by their employee ID in brackets:

- Marsha Calfee [mcalfee]
- Monique Chanel [MCR\_Agent0]
- Steve Hammond [MCR\_SV]
- Trevor McDaddy [MCR\_Agent1]

Figure 12: 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 13: 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.

## 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

## Request Booking in Portal | Cancelling Booking Requests

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	<a href="#">VIEW DETAILS</a> <span style="color: red;">✕</span>
Admin meeting	b	6/21/2016 8:44:18 AM	meeting type 1	Requested	6/21/2016 8:45:11 AM		<a href="#">VIEW DETAILS</a> <span style="color: red;">✕</span>

Figure 14: View Booking Requests

## 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 Booking in Portal | Cancelling Booking Requests

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 15 - View Booking Details

# 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.

# 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).

## 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 Performance DNA users will be able to see the report. If **Admin Report** is enabled only Performance DNA 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 Performance DNA 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.

## 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.

## 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.

## 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 Performance DNA 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 Performance DNA users, regardless of the access level of the logged in user.

**Note:** Crystal reports do not support multi-tenant Performance DNA instances.

## MANAGING ROOMS

To manage rooms, click the Rooms and Locations link from the menu. The table on this page lists the available locations and rooms, and supports the creating and editing of rooms (locations are managed through the Training Manager client). The page displays the rooms and locations in a hierarchy view. The filter box can be used to restrict the view of rooms and locations to just those that contain the search string entered into the filter text box.

**Note:** Inactive rooms and locations will not be visible in this page (they must first be re-enabled through the Training Manager client).

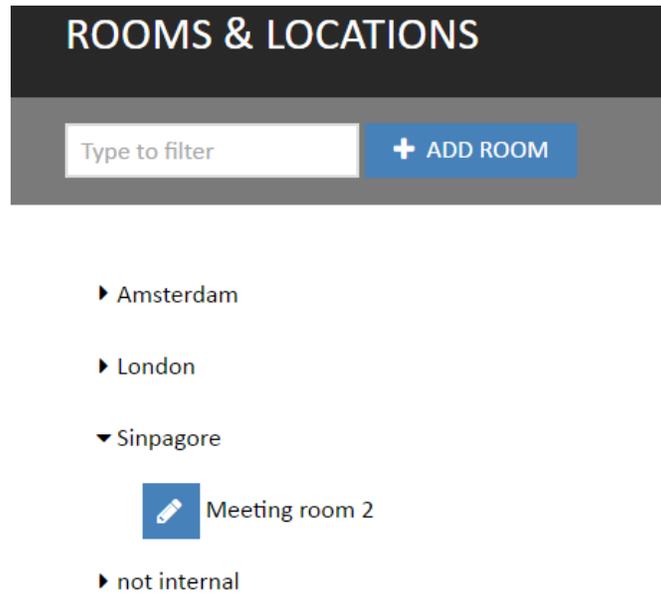


Figure 11 – Rooms & Locations page

Clicking on rooms (either the room name or the edit icon) will open the room editing screen. Rooms can be modified and deleted from the editing page (note: if a room is already being used within training/meeting sessions; the delete option will be unavailable).

Click the **+ Add Room** button to create a new room. Enter the details in the following screen and click **Save** to create a new room.

The screenshot shows a dark header with the text 'ROOMS AND LOCATIONS'. Below the header is a light gray bar with the text 'CREATE ROOM'. Below this bar is a form with the following fields: 'Room Name' with a text input field, 'Room Details' with a large text area, 'External Room' with a checkbox, 'Min Seats Required' with a text input field containing '0', 'Max Seats Available' with a text input field containing '0', 'Location' with a dropdown menu showing 'Please Select', and 'Active' with a checked checkbox. A blue 'SAVE' button is located at the bottom left of the form.

Figure 12 – New Room Screen

To create a new room, enter a room name, specify a location (or tick the external room checkbox if the room is an external room). Room details and min/max seats can also be specified. The **Delete** button may be available depending on whether the room is in use (whether there are any calendar events, meeting sessions or training sessions which use the room).

If Microsoft Exchange integration is enabled, the option will be given to map to any Exchange Room that exists in a Room List.

A screenshot of a web form. On the left, the text 'Mapped Exchange Room' is displayed in a blue font. To its right is a rectangular dropdown menu with a thin border. Inside the menu, the text 'Please Select' is centered, and a small black downward-pointing triangle is located at the bottom right corner of the menu.

Figure 13 – Exchange room selection

Rooms which are mapped to Exchange Rooms will have their calendar data synchronised with Exchange.

Note that once a room has been mapped to Exchange this cannot be changed.

# 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 are deemed to be interruptible
- 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.

## scheduling parameters

MAP TO BOOKING TYPES

+ ADD

Name	Last Edited By	Last Edit	
100% attendees meeting, slight coverage impact	admin	19/02/2016 12:08:07	 
Weekdays training 9AM - 6PM	admin	19/02/2016 12:08:31	 

« < 1 > »      10 items per page      1-2 of 2 items

Figure 19: 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.

## Scheduling Parameters | Managing Rooms

edit scheduling parameters

Name

Booking Strategy

Time and Travel Constraints

Transition Time (mins)

Trainer Travel

Min. Activity Gap Before (mins)

Min. Activity Gap After (mins)

Min. Gap Between Sessions (days)

Performance Constraints

Coverage Tolerance

%

Coverage Target

Attendance Constraints

Min. % of Attendees Required

Interruptible Activities

+ None selected

Figure 20: 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, min 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 Skills Training Manager application). The groups of Interruptible Activity available will vary depending on your WFM system.

Interruptible Activities

- Type to filter...

**Activity**

BillingGoldChat       BillingGoldEmail       BillingGoldVoice       MileageCredit

VacationPackages

**Activity Set**

Email       LostLuggage       LoyaltyCard       MileageCredit

MultiMedia\_Activities       VacationPackages

**Break**

1-Break       2-Break       Break 1       Break 2

Figure 21: 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 name contains the letters you typed.

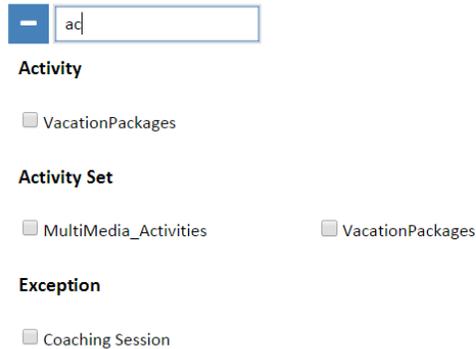


Figure 22: Filtered list of interruptible activities

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.

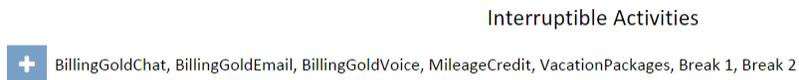


Figure 23: Collapsed list of interruptible activities, with some selected.

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

Working Hours

	Mon	Tue	Wed	Thur	Fri	Sat	Sun
Start	00:00	00:00	00:00	00:00	00:00	00:00	00:00
End	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Enable	<input checked="" type="checkbox"/>						

SAVE
REVERT
CANCEL

Figure 24: 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 un-saved changes to be lost and returns the user to the table of saved scheduling parameters templates.

## 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 un-saved changes to be lost whilst remaining on the same page. The **Cancel** button loses any un-saved changes and returns the user to the **Scheduling Parameters** page.

# System Settings

Portal includes a System Settings screen for specifying additional settings.

Portal URL	<input type="text" value="http://schwa.silverliningsolutions.co.uk/portal"/>
Optimizer URL	<input type="text" value="http://schwa.silverliningsolutions.co.uk/optimizer/"/>
Tenant	<input type="text" value="sls"/>
Sender Name for Event Emails	<input type="text" value="Administrator"/>
From Address for Event Emails	<input type="text" value="sender@address.com"/>
Algorithm Timeout	<input type="text" value="02 : 00"/>

Figure 25: View Booking Requests

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

The Performance DNA URL and Tenant drop-down are used to configure the connection between Training Manager and an Performance DNA 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.

# Managing Rooms and Locations

Rooms can be managed via the Rooms and Locations page in Portal. If Microsoft Exchange integration has been enabled and configured, rooms can also be mapped to Exchange addresses.

To create a new room, click the Create Room button in the Rooms and Locations page. Specify a room name, details, minimum and maximum seats required, location and active status. Optionally, you can also specify a Mapped Exchange Room. If a mapped exchange room is specified, any meetings/training sessions that are published that include the room, will also be automatically published to the appropriate Exchange account (please see the installation guides for instructions on configuring Exchange integration). Once a room has been mapped to an Exchange account, this link cannot be later removed/re-mapped.

This behaviour also applies to reserved places in meetings, i.e. if you book a meeting session with reserved places instead of a user selection, any sessions published with a chosen room will also create a matching event in the room's exchange account (assuming the room has previously been mapped to an Exchange account).

If Exchange rooms are included as resources in training/meeting searches, the Exchange schedules for these rooms will be taken into account when searching for sessions, i.e. any events in the room's Exchange account will prevent the room from being booked for meeting/training sessions.