

CALABRIO™

Calabrio WFM

TRAINING PLANNER 9.0

TRAINER WEB PORTAL

USER GUIDE



March 2, 2021

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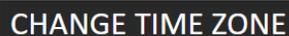
Portal for Trainers

The Trainer has access to:

- Trainer calendar
- View other trainer's calendars
- Room calendar
- Set your regular working hours
- Training roadmap
- Change your time zone

LOGGING IN

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

A dark grey rectangular box with the text "CHANGE TIME ZONE" in white, uppercase letters.

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

(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna ▾ **Continue**

Figure 1: Setting your time zone

Depending on how Portal is accessed a login may be required. If you are presented with a login screen when accessing the system, enter your username for **User Name** and your surname for the **Password**.

After logging in, the default page for the trainer role will be displayed. The menu on the left can be used to access other screens. To log out of the system, click the Logout link at the bottom of the menu.

Trainer Calendar

Selecting **Trainer Calendar** displays any activity that the trainer has been scheduled for within the date range, including team meetings and other meetings.

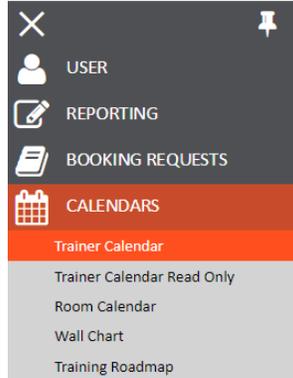


Figure 2: Selecting Calendar

By default **Standard View** is always presented, as in the example below.

Some information about the session is visible in the training session bar, such as date, time, training session and room, if applicable.

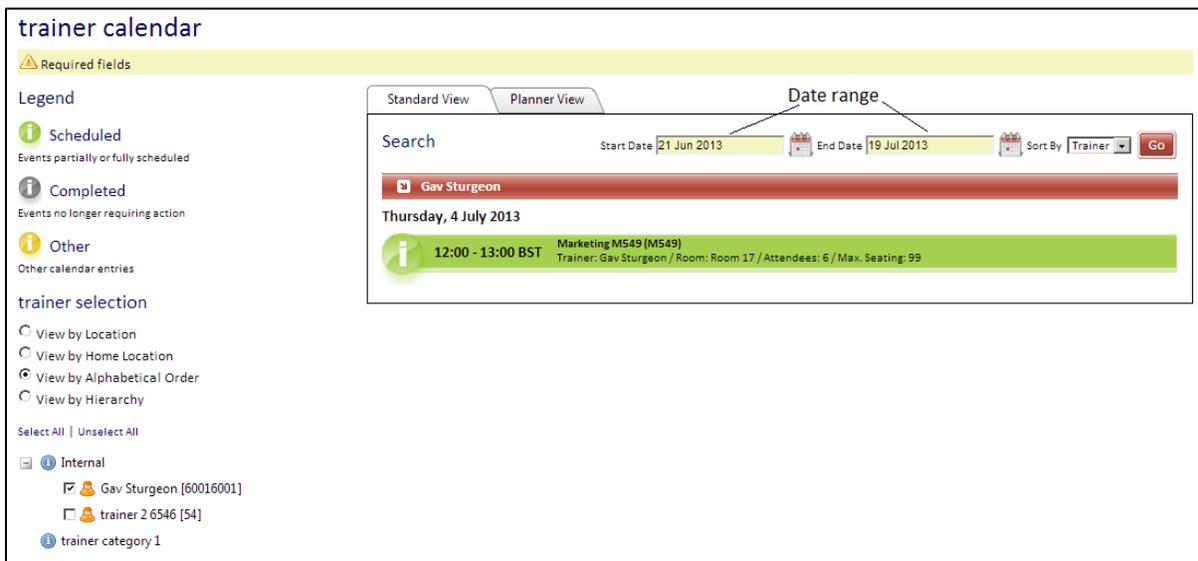


Figure 3: Trainer calendar

The status of the training activity is color-coded in line with the status indicators.

Clicking on one of the training session bars expands it to reveal the scheduled attendees, together with any additional details.

Once the training session has commenced the trainer can update the attendance register by selecting **Attendance Register**.

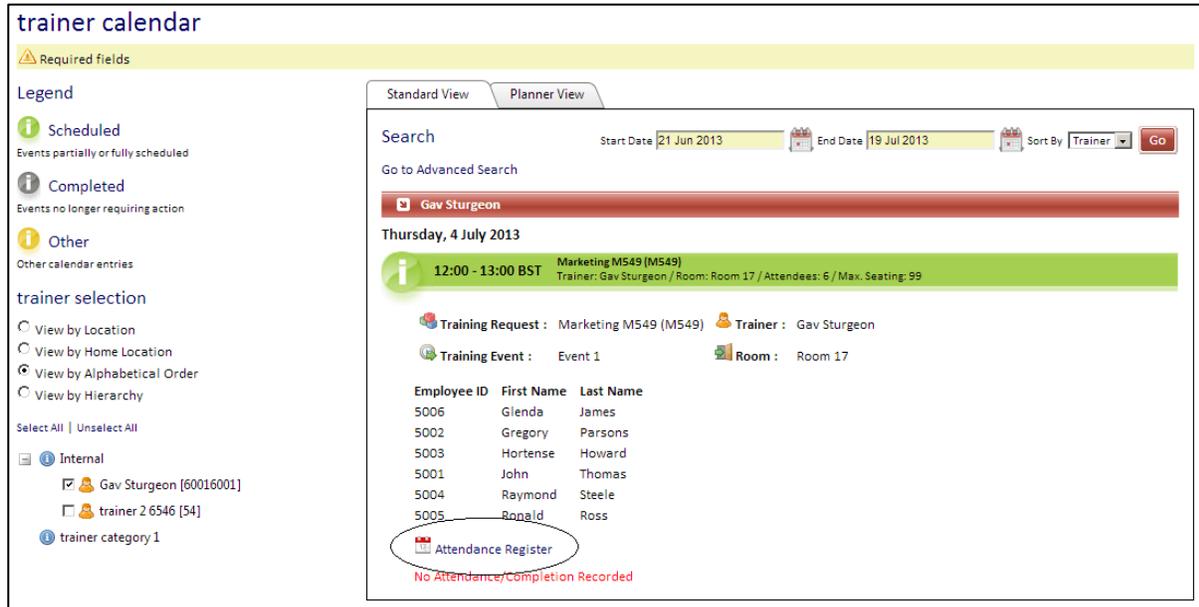


Figure 4: Attendance register

The attendance register presented will be similar to the example below and it has to be updated with who has attended and completed the training.

There are text boxes for any comments which are stored against the training session. This information is then available in a Training Manager report.

Click either **All** or **None** to update multiple delegates, or use the individual drop-down menu against each delegate.

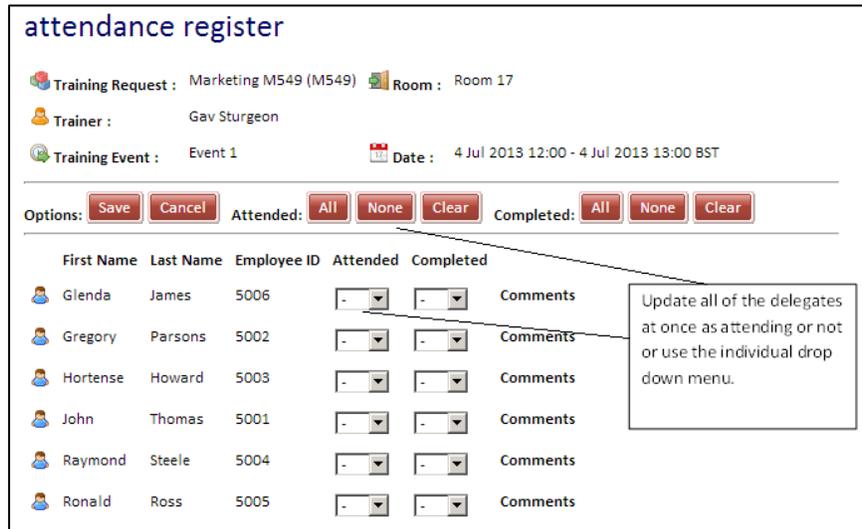


Figure 5: Completing the attendance register

Trainer Calendar | Logging In

When you are finished, click **Save**. This returns you to the main menu. Information entered automatically updates Training Manager for tracking attendance and training completion. Any agents who do not attend and attend but do not complete the scheduled training, can then be rescheduled to take the training again if required.

You can select **Main Menu** at any time to return to the main home page.

There is also the option to view any scheduled activity in Training Manager View.

Click the **Training Manager View** tab to view the information by Day, Week or Month (by default Day view will be presented).

Note: There must be session details in the Standard View to view information.

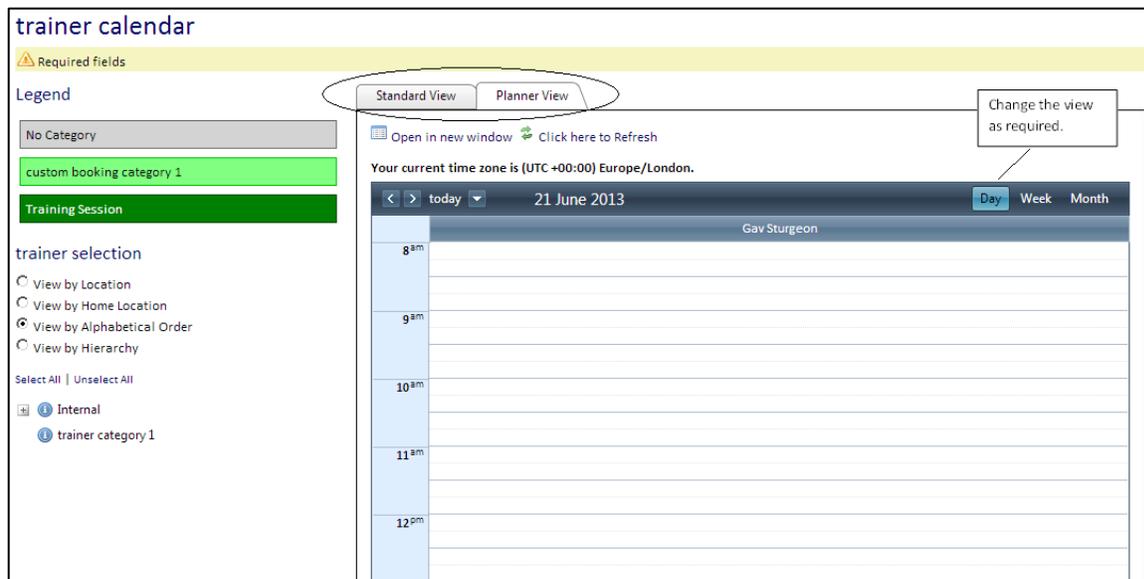


Figure 6: Standard and Training Manager views

Unavailable time can be entered directly into the Portal. Right-click in the Training Manager window and select **New**.

Trainers can also select the **Go to Today** option to view the Training Manager view in a 24-hour view.

The screenshot shows the 'trainer calendar' interface. On the left, there is a legend with categories: 'No Category', 'custom booking category 1', and 'Training Session'. Below the legend is a 'trainer selection' section with radio buttons for 'View by Location', 'View by Home Location', 'View by Alphabetical Order', and 'View by Hierarchy'. There are also checkboxes for 'Internal' and 'trainer category 1'. The main area shows a calendar for 'Gav Sturgeon' in 'June 2013'. A context menu is open over the calendar, with options: 'New...', 'Go to Today', and 'Toggle 24 Hours/Business Day...'. The 'New...' option is circled in red.

Figure 7: Creating calendar entries

When **New Entry** is selected, the **New Trainer Calendar Entry** form appears.

The 'New Trainer Calendar Entry' form has the following fields and controls:

- Subject: Text input field.
- Start time: Date and time dropdowns (05/06/2013 00:00).
- End time: Date and time dropdowns (05/06/2013 00:00).
- Category: Dropdown menu.
- Description: Text area.
- Recurrence: checkbox.
- Save and Cancel: Buttons at the bottom right.

Figure 8: New calendar entry form

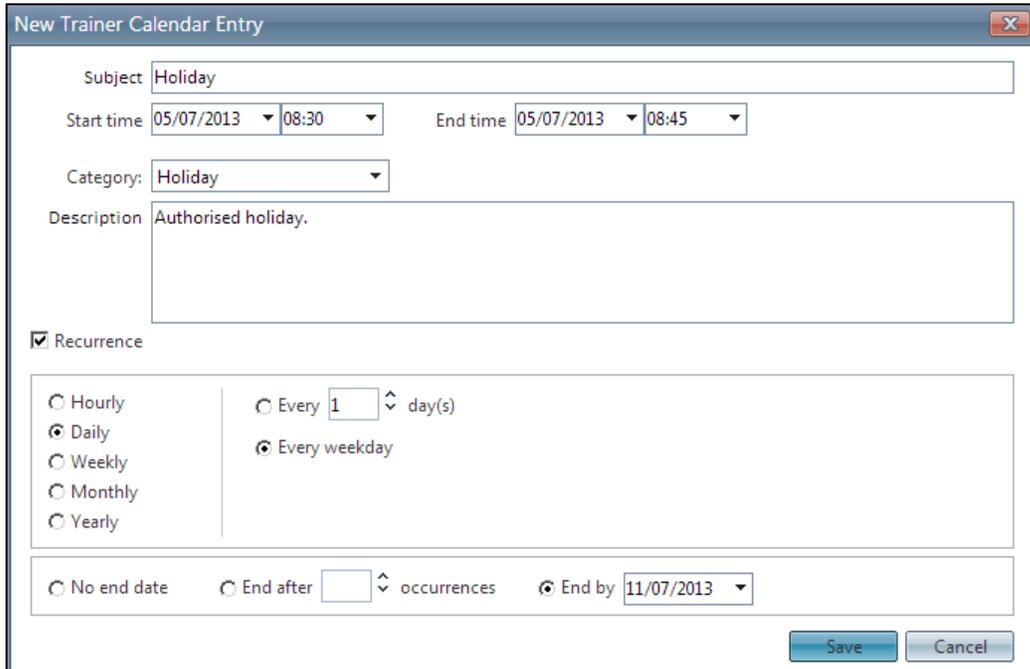
Complete the template as required and in this example unavailable time is being entered as holiday. The associated colour for the entry is visible under 'key'.

If the unavailable time being entered is for multiple days, click the **Recurrence** check box. This will give each day a separate entry in the Standard View.

Note: Multiple days can be entered using the start time and end time but will only give one entry in the standard view.

When Recurrence is selected, additional information will be required.

In this example, the holiday is being entered for 4 days and therefore the option **End after** has been selected with an end date of 14/06/2012.



The screenshot shows a dialog box titled "New Trainer Calendar Entry". It contains the following fields and options:

- Subject: Holiday
- Start time: 05/07/2013 08:30
- End time: 05/07/2013 08:45
- Category: Holiday
- Description: Authorised holiday.
- Recurrence
 - Hourly
 - Daily
 - Weekly
 - Monthly
 - Yearly
 - Every 1 day(s)
 - Every weekday
- No end date
- End after [] occurrences
- End by 11/07/2013

Buttons: Save, Cancel

Figure 9: Entry recurrence settings

The holiday will now appear in the **Training Manager View** as Holiday, with the colour matching the Holiday key to the left.

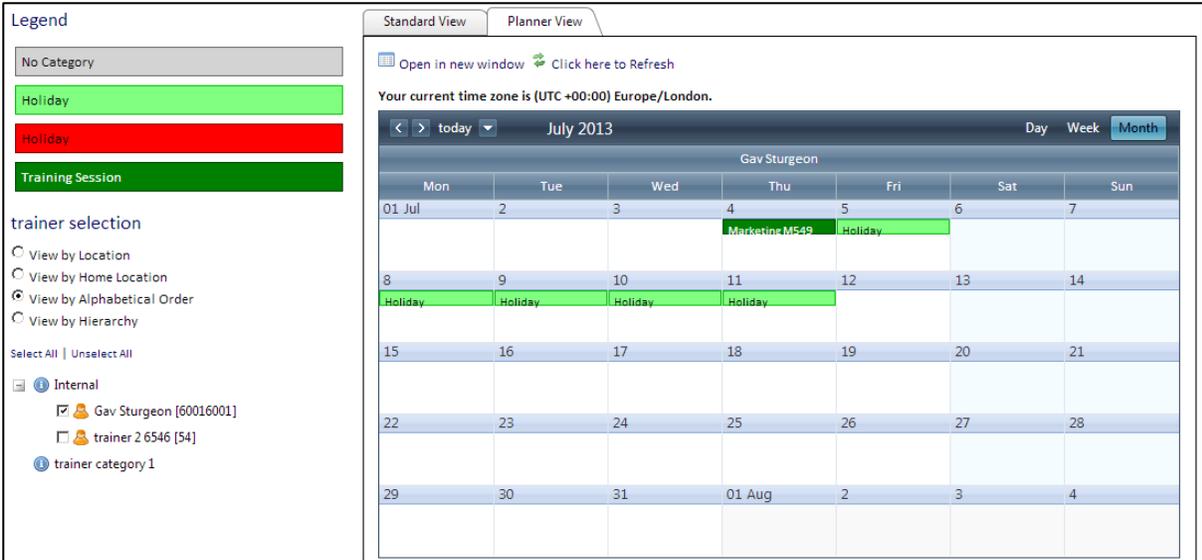


Figure 10: Training Manager view

Changes cannot be made to any activity scheduled by Training Manager.

To make any changes to events that have been manually entered, right-click on the event and the option to edit or delete the entry will appear.

Note: Scheduled training activity cannot be amended or cancelled in the Portal.

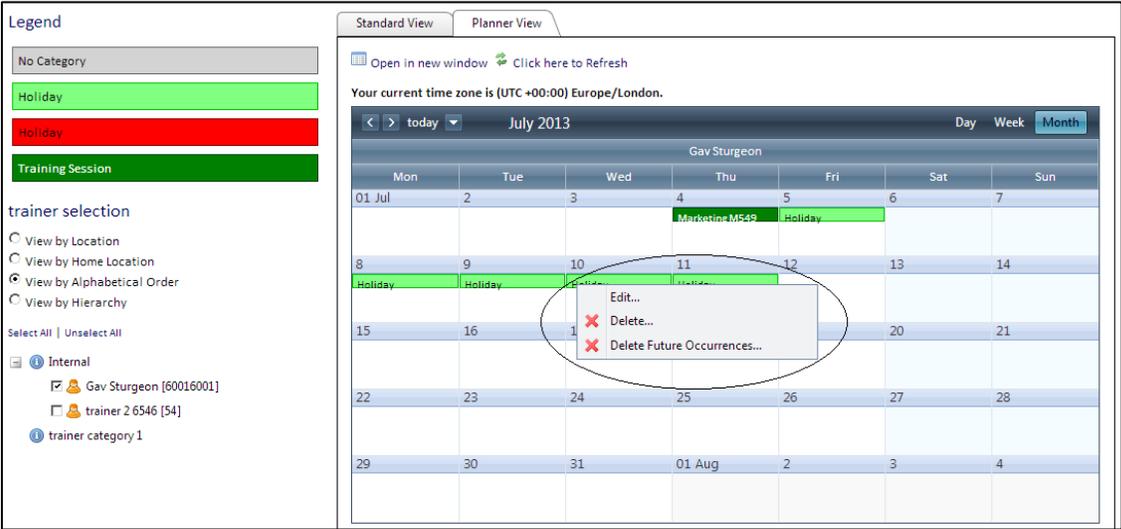


Figure 11: Editing calendar entries

Select **Edit** to edit either the entry occurrence or the series. In this example this is a recurring appointment. Select **Edit only this occurrence** to edit the entry on the selected date.



Figure 12: Editing an occurrence of the calendar entry

Select **Edit the series** to edit the original entry.

Select **Delete** to delete an individual date or **Delete Future Occurrences** to leave the existing date and delete all of the other associated dates.

Select **Delete: Delete only this occurrence** or **Delete the series** for all of the dates.



Figure 13: Deleting an entry occurrence or series

View other trainers' calendars

Trainers have visibility of their colleagues' calendars by selecting **view other trainer's calendars** from the menu.

Select which trainer calendars to view from the list and click on **Go** to view the data. In the example below Mark McLeish has been selected. The presented information is read only and cannot be edited or changed.

The screenshot displays the 'trainer calendar' interface. On the left, there is a legend with three categories: 'Scheduled' (Events partially or fully scheduled), 'Completed' (Events no longer requiring action), and 'Other' (Other calendar entries). Below the legend is the 'trainer selection' section, which includes radio buttons for 'View by Location', 'View by Home Location', 'View by Alphabetical Order' (selected), and 'View by Hierarchy'. There are also 'Select All' and 'Unselect All' options. Underneath, a list of trainers is shown under the 'Internal' category: 'Gav Sturgeon [600160001]' (unchecked) and 'Mark McLeish [54]' (checked). A 'trainer category 1' is also listed. On the right, there is a search bar with 'Standard View' and 'Planner View' tabs. The search bar contains 'Search', 'Start Date' (21 Jun 2013), 'End Date' (19 Jul 2013), and 'Sort By' (Trainer). A red 'Go' button is located to the right of the search bar. Below the search bar, an 'Information' section states: 'There is currently no data to show. Select one or more trainer from the treeview to view all the report for all of those trainers. Expand any location to view the trainers at that location.'

Figure 14: Selecting and viewing trainer calendars

Room Calendars

Selecting **room calendar** provides a view of any scheduled activity by room.

Expand the room and location view, select either the location or room(s) and click on **Go** to view the activity within the date range.

Click on the bar to view any additional detail.

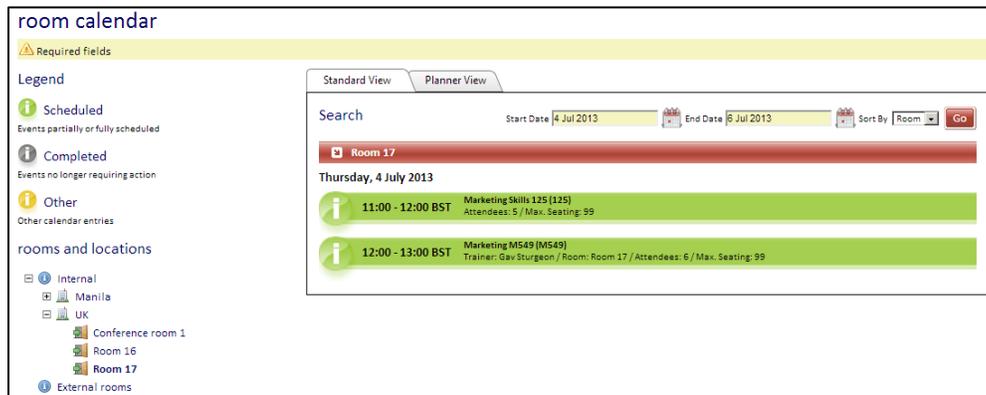


Figure 15: Viewing room calendars

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.

Set your regular working hours

Make any changes to working hours in the Portal.

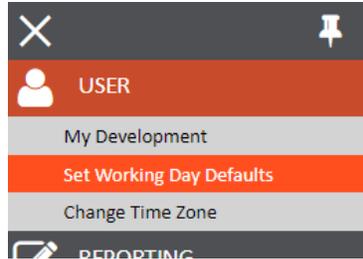


Figure 16: Editing regular working hours

Use the drop down boxes to make any changes and click **Save**.

SET WORKING DAY DEFAULTS

Information
Change the data below to set your default working days and hours.

Day of Week	Start Time	End Time	Earliest Lunch Start	Earliest Lunch End
Monday	08 ▾ 00 ▾	18 ▾ 00 ▾	12 ▾ 00 ▾	14 ▾ 00 ▾
Tuesday	08 ▾ 00 ▾	18 ▾ 00 ▾	12 ▾ 00 ▾	14 ▾ 00 ▾
Wednesday	08 ▾ 00 ▾	18 ▾ 00 ▾	12 ▾ 00 ▾	14 ▾ 00 ▾
Thursday	08 ▾ 00 ▾	18 ▾ 00 ▾	12 ▾ 00 ▾	14 ▾ 00 ▾
Friday	08 ▾ 00 ▾	18 ▾ 00 ▾	12 ▾ 00 ▾	14 ▾ 00 ▾
Saturday	08 ▾ 00 ▾	18 ▾ 00 ▾	12 ▾ 00 ▾	14 ▾ 00 ▾
Sunday	08 ▾ 00 ▾	18 ▾ 00 ▾	12 ▾ 00 ▾	14 ▾ 00 ▾

Save

Figure 17: Editing regular working hours

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 18: 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.

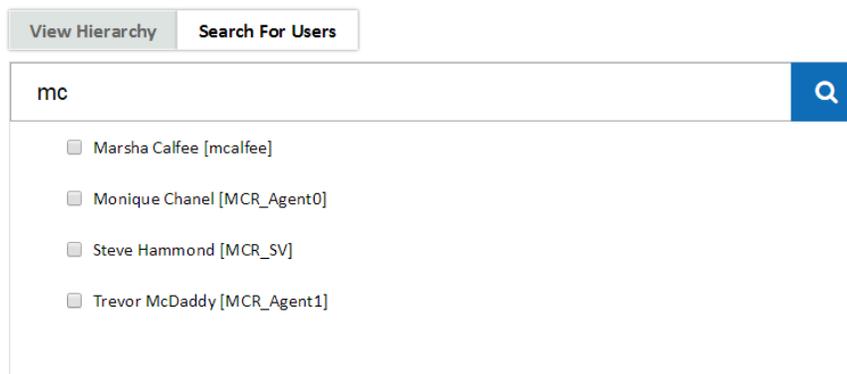


Figure 19: Selecting users from the WFM hierarchy

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 20: 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 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 21: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 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 22: View Booking Details

Training Roadmap

The training roadmap is displayed in the right-hand window, and contains the latest training activity.

Select **Training Roadmap** to view all training sessions currently scheduled in Training Manager.

The training is colour coded based on the status indicators.

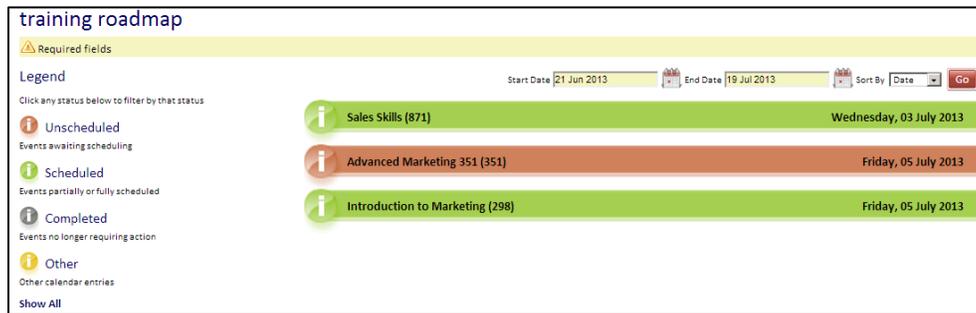


Figure 23: Training types

Click on the training session to reveal any additional details, such as Objectives and Additional Notes. The training sessions can also be filtered using the **Sort By** drop-down menu.

The training roadmap is available in the right-hand window, and the latest training activity is listed in the training roadmap window.

Select **view the training roadmap** to view the training sessions currently scheduled in Training Manager that are associated with the Trainer.

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.

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.