Genesys®

Skills Assessor 8.1.125

Upgrade Guide from 8.1.1

About Genesys

Genesys is the world's leading provider of customer service and contact 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

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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: 81skillsassessor_installation-guide_06-2013_v8.1.101.00

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Preface

Welcome to the *Genesys Skills Assessor Installation Guide.* This *Installation Guide* has been designed to allow an administrator to install the Skills Assessor application.

This document is valid only for the 8.1.125 release of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Technical Support website.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 9.

About Genesys Skills Assessor

Genesys Skills Assessor allows companies to use a combination of online tests, self-assessment, and observational feedback to assess the level of agent skills across their contact center. Agent skill levels are stored in a central skills database and can be combined with performance data from legacy systems— for example, CRM sales data and Learning Management System courses.

Centralizing agent skills information allows contact centers to build a "DNA profile" of skills for each agent to identify:

- What are the "must have" and "nice to have" skills for each job type?
- Who really knows what across the contact center?
- Who has what skills and skill levels?
- Who requires what type of training, and when?

Skillsroute enables companies to create and manage multiple agents, skills, and skill levels in Configuration Manager. Skill assessment results exported directly from Skills Assessor can be used to optimize multi-skilling and call routing, to ensure that the customer is always presented to the most knowledgeable agent available.

Intended Audience

This document is primarily intended for system administrators or other individuals who install Genesys Skills Assessor.

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 Care Program 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.

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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.

Genesys product documentation is available on the:
- Genesys Technical Support website at http://genesyslab.com/support.

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:

81gp_icg_aspect-wfm_08-2012_v8.1.001.00

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 • Mathematical variables Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets below).	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. The formula, $x + 1 = 7$ where x stands for . . .
Monospace font (Looks like `teletype` or `typewriter text`)	All programming identifiers and GUI elements. 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. Enter `exit` on the command line.
Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise. **Note:** In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	`smcp_server -host` `<confighost>`

1   Prerequisites

Server prerequisites

SQL Server prerequisites

To upgrade the database portion of the application you will need:

- Windows Server 2003 / 2008 / 2008R2 32 or 64bit.
- Microsoft SQL Server 2005 / 2008 (Standard or Enterprise required for DNA functionality).
- DNA requires SQL Server Agent, Analysis Services and Integration Services to be available on the server.
- Administrator access to the SQL Server.
- An existing, working, version 8.1.1 database.

Web server prerequisites

- Windows Server 2003 / 2008 / 2008R2 32 or 64bit.
- Microsoft .NET Framework 4.0
- Internet Information Services
  - IIS must be configured to allow ASP.NET v4.0.30319. For more information, see http://goo.gl/Iq6Nb and http://goo.gl/c0fWb.
  - For x64 based OSes, the application pool used for the web application needs to allow 32 bit processes. (For IIS6, more information can be found at http://goo.gl/XTQwj. For IIS7+, this is configurable through IIS Manager).
  - Administrator access to the server

o   An existing, working, version 8.1.1 application.

Required Files

Your IP folder should contain the following files and folders:

- `SkillsAssessor`
    - o   This contains the files and folders required to upgrade the web application
- `DB Installation Files`
    - o   This contains the files required to upgrade the database
- Installation Guides
    - o   Contains this document and the installation guide.

2 Database Upgrade

Preparation

- Copy the contents of the `DB Installation Files` folder to the SQL Server
- Take a backup of your existing SkillsAssessor database.

Update the Database

1. Open Microsoft SQL Server Management Studio and login as an admin user.
2. Click `New Query`
3. Drag the `Skills Assessor 8.1.125 - Upgrade from 8.1.1.sql` database script file from your copy of the `DB Installation Files` folder into the new query area of the SQL Server Management Studio.
4. Enable SQLCMD mode by clicking the `script` menu item and ensuring that the `SQLCMD Mode` item is active.
5. Ensure that the database selected to run the script against is your existing database.
6. Execute the script to update the database.

Import the Integration Services package

Note: This step is only required if you require DNA as part of your application and you have not already configured an Integration Services package as part of the previous version.

To implement DNA, you must import the Integration Services package to allow the web application to process of the DNA Cube.

1. Copy the `RefreshDNACube.dtsx` file from the `DB Installation` files folder

2. Using SQL Server Management Studio, connect to the Integration Services server and navigate to `Stored Packages \ MSDB`.

3. Right-click on the MSDB node and choose the `New Folder` option from the context menu. Give the folder a name (for example, GenesysSA).

4. Right-click the folder you just created and choose `Import Package`. The `Import Package` dialog will appear.

5. In the `Package location` drop-down list, choose `File System`.

6. Click on the `[..]` button at the end of the `Package path` box, and browse to your copy of the `DB Installation Files` folder.

7. Select the `RefreshDNACube.dtsx` file then click `Open`.

8. Click on the `[..]` button at the end of the `Protection level` box, and select `Rely on server storage and roles for access control`. Then click `OK`.

9. Click `OK` to complete the import of the package.

10. For illustrative purposes in this document it is assumed that the MSDB subfolder is called `GenesysSA` and that the package name was left as `RefreshDNACube`.

Chapter

3 Web Application Upgrade

Backup the existing web application and set file permissions

1. Locate the current application folder on the web server.
2. Copy the current application folder and all its contents to another location to serve as a backup.

Upgrade the application files

1. Locate the current application folder on the web server.
2. Copy the entire contents of the `Skills Assessor` folder in the install package, except the `Websettings.config` file.
3. Paste them over the top of the current application folder, replacing all files.

Note: If you accidentally overwrite your existing `Websettings.config` file with the one from the install package, you should copy your original back from the backup you made in 3.1.1 above.

Your application is now upgraded.