



**SkillsAssessor 8.5.4**

# Email Notification Service Installation Guide

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## Preface

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

This document is valid only for the 8.5.423 release of this product.

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

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For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 6.

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## 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.

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## Intended Audience

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

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## 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@genesys.com](mailto:Techpubs.webadmin@genesys.com).

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## 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.
- The *Genesys Technical Publications Glossary*, which provides a comprehensive list of the Genesys and CTI terminology and acronyms used in this document. The Glossary is located here: <http://docs.genesys.com/Glossary>
- The Release Notes and Product Advisories and Genesys product documentation for this product are available on the Genesys Documentation website at <http://docs.genesys.com/Documentation>.

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# 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\_08-2014\_v8.1.001.00

You will need this number when you are talking with Genesys Technical Support about this product.

## 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	<ul style="list-style-type: none"> <li>Document titles</li> <li>Emphasis</li> <li>Definitions of (or first references to) unfamiliar terms</li> <li>Mathematical variables</li> </ul> <p>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).</p>	<p>Please consult the <i>Genesys Migration Guide</i> for more information.</p> <p>Do <i>not</i> use this value for this option.</p> <p>A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession.</p> <p>The formula, <math>x + 1 = 7</math> where <math>x</math> stands for . . .</p>

Type Style	Used For	Examples
<p>Monospace font (Looks like teletype or typewriter text)</p>	<p>All programming identifiers and GUI elements. This convention includes:</p> <ul style="list-style-type: none"> <li>• The <i>names</i> 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.</li> <li>• The values of options.</li> <li>• Logical arguments and command syntax.</li> <li>• Code samples.</li> </ul> <p>Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.</p>	<p>Select the Show variables on screen check box.</p> <p>In the Operand text box, enter your formula.</p> <p>Click OK to exit the Properties dialog box.</p> <p>T-Server distributes the error messages in EventError events.</p> <p>If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls.</p> <p>Enter exit on the command line.</p>
<p>Angle brackets (&lt;&gt;)</p>	<p>A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise.</p> <p><b>Note:</b> 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.</p>	<pre>smcp_server -host &lt;confighost&gt;</pre>



Chapter

# 1 Prerequisites

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## Email server

The Email Notification Service needs to be able to communicate with a designated SMTP server. The service must be configured based on the settings of the SMTP server, e.g. whether using default credentials is enabled.

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## Service Hosting

The service may be installed either on the same server that hosts the Skills Assessor database or on a separate machine. If it is installed on a separate machine, the service must be able to communicate with the Skills Assessor database via a network.

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## Required Files

The service is installed via a single .msi installer file named: 'Genesys.SkillsAssessorMessagingServiceSetup.msi'. This file is located in the SkillsAssessorMessagingService folder of the release package.



Chapter

# 2 Installing the Messaging Service

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## Preparation

Copy the Genesys.SkillsAssessorMessagingServiceSetup.msi installer file to the computer which will host the messaging service.

Run the .msi file and follow the step-by-step wizard.

Next the service must be configured by editing the `config` document.

# 3

## Configuring the Messaging Service

Browse to the directory where you installed the service (default location is: C:\Program Files\Genesys\Genesys.SkillsAssessorMessagingServiceSetup\). Open the SkillsAssessorMessagingService.exe.config file using Notepad or similar text editor.

---

### Mandatory Configuration Settings

Edit the database connection string to allow the service to access the Skills Assessor database.

The settings that must be changed include:

- Data source
- Database
- UID
- PWD

```
<connectionStrings>
```

```
<add
```

```
name="SkillsAssessorMessagingService.My.MySettings.ConnectionS  
tring" connectionString="Data
```

```
Source=MACHINENAME\DATABASESERVERNAME; Database=DATABASENAME; UI  
D=###; PWD=###; Trusted_Connection=False" />
```

```
</connectionStrings>
```

Set the Data Source entry to the computer hosting the Skills Assessor database.

Set the `Database` entry to the name of the database instance hosting the Skills Assessor schema.

Set the `UID` entry to a user with `dbowner` permissions on the Skills Assessor schema (create a new user for this purpose if one is not already present).

Set the `PWD` entry to the password of the user.

Once the database connection string has been set, two settings need to be configured in the `application settings` section of the config file. These include:

- `SMTPServer`
- `FromAddress`

In the `SMTPServer` entry, enter the IP address or domain name of the SMTP server that will be used to send notification messages:

```
<setting name="SMTPServer" serializeAs="String">
<value>###.###.###.###</value>
</setting>
```

The `FromAddress` entry may also be edited, using the format:

```
<setting name="FromAddress" serializeAs="String">
    <value>SkillsAssessor@yourcompany.com</value>
</setting>
```

This field will be used to set the `from` address for sent emails.

Finally, the `UseDefaultCredentials`, `Username`, `Password` and `ssl` entries should be used depending on the configuration of the SMTP server. If the SMTP server accepts requests without account details, these entries can be left at their default values. If your SMTP server requires user credentials, however, these should be set for the `username`, `password` and `port` entries and the `UseDefaultCredentials` entry should be set to `false`. The format for setting the username and password fields are provided below.

```
<setting name="Username" serializeAs="String">
    <value>username</value>
</setting>
<setting name="Password" serializeAs="String">
<value>password </value>
</setting>
```

Note the password is stored as plain text.

If setting up to use Gmail as the SMTP server, then it is a good idea to have a new email address specifically for this purpose. `SMTPServer` should be set to `smtp.gmail.com` then use port 587, enable SSL, set the `username` and

password appropriately, `UseDefaultCredentials` should be `False`. Note that the `FromAddress` cannot be used with gmail as it uses the `username`.

The remaining settings may be left at their default values or modified as required.

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## Optional Configuration Settings

### SendEveryNMinutes Setting

In the `application` settings section it is possible to change the service's polling delay, i.e. the time delay the service uses (in minutes) between subsequent database requests to find whether there are additional emails to be sent.

### NumberOfSendAttempts Setting

The `NumberOfSendAttempts` entry relates to the number of times that the service will attempt to re-send an email notification if previous attempts have failed.

### Subject Setting

The `Subject` setting contains the string used for the subject of sent email notifications.

### MessageBody Setting

The `MessageBody` setting contains the string used for the main content of sent email notifications. The default string contains the following numbered variables:

`{0}`: The full name of the person who has completed an assessment.

`{1}`: The name of the completed assessment.

`{2}`: The time and date of assessment completion.

The `MessageBody` setting can be modified, however, the variables should remain within the message and they will only be interpreted correctly by the service provided the format remains consistent with the default setting, i.e. `{#}`.

Once you have completed editing the `config` file, save and close the file. Once the settings have been set, the service should be started and set to start-up automatically.

# 4

## Starting Service and Configuring Service for Automatic Restart after System Restart

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### Starting Service

In order to start the service, follow the following steps:

1. Click start
2. In Windows XP:
  - Click Run
  - Type `Services.msc` into the run field.
  - Click OKIn Windows 7:
  - Type `services` into the search programs and files field. The `services` program should appear in the search result list
  - Click the `services` program
3. From the list of services, locate the `Skills Assessor Messaging Service`.
4. To start the service, right click on the service in the list and click `Start` from the menu.

By default the service must be started manually. As a result, if the computer hosting the service is restarted, the service must be manually restarted. It is recommended that once the config file has been set up, the service should be set to start automatically after system reboots.

To change the service's start-up setting perform the following steps within the Services.msc program:

- Right click on the Skills Assessor Messaging Service from the list of local services.
- Click Properties
- Change the Start-up type dropdown list to Automatic

# 5

## Configuring Skills Assessor to Use the Email Notification Service

To configure Skills Assessor to use the Email Notification Service, the service must be enabled within the 'Manage General Settings' widget and this setting must be mapped to a user field that contains user email addresses.

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### Enabling the Email Notification Service

In order to enable the Email Notification Service the following steps must be performed:

1. Login to Skills Assessor as a user with access to the Manage System Settings page.
2. Click on the Manage System Settings page.
3. Within the User Fields tab create a new user field which will be used to store user email addresses. This step may be skipped if such a user field already exists.
4. If this user field has been created, ensure that it is populated with valid user email addresses.
5. Click on the General Settings tab within the Manage System Settings widget
6. Check the Message Manager on Assessment Completion checkbox.
7. Select the email user field from the Email Field dropdown list.
8. Click Save Changes.

Once the service and Skills Assessor have been set up and configured completed feedback assessments which are defined as self & manager will automatically cause an email notification to be sent to the manager when a user completes the assigned assessment.



Chapter

# 6 Troubleshooting

The Messaging Service logs all failures to send email to the Skills Assessor database. An administrator can add the Messaging Log widget to one of their tabs. This shows the messaging log for the selected date (defaults to today's date).