GENESYS™

Skills Management 8.5.648

Email Messaging Service Installation Guide

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1   Introduction

The email messaging service is required to support the automated email notification functionality in both Skills Assessor and Training Manager.

Skills Assessor supports the ability to automatically send an email notification to managers when their subordinates have completed an assessment or have completed the agent part of a self & manager feedback assessment. It is also possible to configure Skills Assessor to send email notifications to users when they have had learning items assigned to them.

The Skills Assessor PDR functionality also supports a number of email notification options, including: notifications to managers/team leaders when an agent submits a new objective, when the completion of a review period is imminent and when a review period starts.

Training Manager supports the ability to send email notifications to users when they've been scheduled to attend meetings or training sessions.

The Email Messaging Service can be configured to provide email notification functionality for both products (Training Manager and Skills Assessor), or one of them. This guide assumes that the service is to be configured for both products.

2 Prerequisites

The Email Messaging Service must 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.

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

The user logging on to the server to install the Email Messaging Service should have local administrator privileges. The service should also be started for the first time under an account that has local administrator privileges in order to have access to the system event log. Once the service has been installed and started successfully for the first time it can be switched to run under an alternative account, e.g. Network Service.

3 Required Files

The service is installed via a single .msi installer file named:
EmailMessagingServiceSetup_v8.5.648.msi. This file is located in the main release package folder.

Browse to the release folder and run the installer MSI. Follow the installer instructions to complete the installation.

Locate the following element:

<connectionStrings>
<add name="MessagingService.My.MySettings.ConnectionString"
connectionString="Data Source=*;Database=Training**
Manager;UID=*;PWD=***;Trusted_Connection=False"/>**
</connectionStrings>

Update the connection string details to match the connection settings to your Training Manager database.

Browse to the service's installation folder (default: C:\Program Files (X86)\Silver Lining Solutions\MessagingService\) and open the MessagingService.exe.config file with Notepad or similar text editor.

Note: If the service was running prior to changes being made to the configuration file, the service will need to be restarted in order for the changes to take effect.

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>SMTP SERVER HERE</value>
</setting>

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 probably a good idea to have a new email address specifically for this. 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, it uses the username.

Locate the following element:

```
<setting name="EnableOutlookMessages" serializeAs="String">
        <value>False </value>
</setting>
```

Set the value of this element to **True** to enable Training Manager to send notification emails.

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 check whether there are additional emails to be sent.

```
<setting name="SendEveryNMinutes" serializeAs="String">
        <value>10</value>
</setting>
```

Locate the following element:

```
<setting name="OutlookDefaultFrom" serializeAs="String">
     <value>Your.default@AnAddress.com</value>
</setting>
```

The email value entered will be used as the default **From** address for notification emails sent for training sessions that don't include a trainer.

Locate the following section and edit the endpoint to match your environment:

```
<client>
<endpoint address=http://***/***/MessageStorage.svc binding="basicHttpBinding"
bindingConfiguration="BasicServiceBinding" contract="MessageStorage.IMessageSt
orage" name="MessageStorageEndpoint" />
</client>
```

Locate the following element:

```
<setting name="EnableAssessmentMessages" serializeAs="String">
<value>False</value>
</setting>
```

Set the value of this element to **True** in order to enable assessment notifications in Skills Assessor.

If you wish to use a default organizer name for sent ICS files, locate the following element and set its value to **True**. This will cause sent ICS files to include the value of the **OutlookDefaultFrom** element instead of the organiser's name.

```
<setting name="UseDefaultOrganizer" serializeAs="String">
<value>False</value>
</setting>
```

3.1   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 search for 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 if the format remains consistent with the default setting, e.g. '{#}'.

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   Setting the Service to Start Automatically

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

Click start

In 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

From the list of services, locate the **Email Messaging Service**.

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 **Email Messaging Service** from the list of local services.
- Click **Properties**
- Change the **Start-up** $type$ dropdown list to **Automatic**
- Apply the changes

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.

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 permission to the **Manage System Settings** widget.
2. Click on a tab that contains the **Manage System Settings** widget.
3. Click on the **Manage System Settings** widget.
4. 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.
5. If this user field has been created, ensure that it is populated with valid user email addresses.
6. Click on the **General Settings** tab within the **Manage System Settings** widget
7. Check the **Message Manager on Assessment Completion** checkbox.

8. Select the email user field from the **Email Field** dropdown list.
9. 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 trigger an email notification to be sent to the manager when a user completes the assigned assessment.

5   E-mail ADG Setting for IEX WFM

In previous versions the IEX e-mail ADG was specified via the SkillsManagerWS/WebSettings.config file. This setting has been removed from this file. The e-mail ADG is now set in the SkillsPortal screen of the Training Manager client (labelled "Email ADG Name"). The upgrade process does not retain this value, therefore, it is necessary to replace it in the SkillsPortal settings screen after upgrading.

6   Configuring the Invoker application

The Invoker application is installed automatically with the Assessment Messaging Service. The Invoker application communicates with the Personal Development Service to queue the sending of PDR-related email notifications.

The default installation location is: **C:\SLS\Applications\Invoker**.

The installer creates a Windows Scheduled Task called **Silver Lining Scheduled Task Invoker**. By default this task runs every 30 minutes. The settings for the scheduled task can be modified by running the Task Scheduler and editing the settings of the **Silver Lining Scheduled Task Invoker**.

There are two required configuration settings within the Invoker/Apps.Invoker.exe.Config file:

- The endpoint to the Personal Development service.
    - o This endpoint will be automatically populated if the application is installed on the Skills Management web server and the web server components were installed via the automated installer.
    - o The setting is located in the following element:

      <endpoint binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding" contract="PersonalDevelopmentService.IPersonalDevelopment" name="PersonalDevelopmentService" address="**http://***/ Services.PersonalDevelopment/PersonalDevelopment.svc**"/>

    - o If the server components were not installed via the automated installer, the correct endpoint should be entered into the config file manually.
- The log file location.
    - o The LogPath element in the file specifies the directory which will be used for storing the application's log files. By default this path is set to: "C:\SLS\Logs\"
    - o The level of detail for logging can be set to one of the following options:
        - Minimal
        - Terse
        - Verbose
        - Diagnostic
    - o Diagnostic logging will provide more detail.
    - o **Note**: The Invoker application only creates log files in the event of an error when communicating with the Personal Development service. Under normal operation no log files will be created regardless of the specified logging mode.
    - o The path can be edited by changing the following file element:
    - o <add key="LogPath" value="**C:\SLS\Logs**"/>

6.1   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).

If the service fails for any other reason, e.g. it cannot connect to the database, the service will write an error event to the event log. To view the event log, follow the following instructions:

1. Click **Start**
2. Click **Run**
3. Enter **eventvwr.msc** into the run window
4. Click **OK**
5. Browser the event viewer for events that list **EmailMessagingService** as their Source.
6. Double click on the item to view more detail about the event.