



Genesys Training Manager 8.0

Installation Guide

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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.

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Table of Contents

Chapter 1	Preface.....	4
	About Genesys Training Manager	4
	Intended Audience.....	5
	Making Comments on This Document.....	5
	Contacting Genesys Technical Support	6
	Related Documentation Resources	7
	Document Conventions	8
 Chapter 2	 Installation Guide.....	 11
	Required Files.....	11
	Prerequisites.....	11
	Database Installation	11
	File Installation (IIS and Client).....	12
	Internet Information Services (IIS) Configuration - Skills Manager Web Service	12
	Diagnostics/IIS and Database Check	15
	Installing and Running the Application.....	17
	Installing the Application	17
	Running the Application	18



Chapter

1 Preface

Welcome to the *Genesys Training Manager Installation Guide*. This Installation Guide describes how to install and configure the components of this product.

This document is valid only for the 8.0. releases of this product.

Note:

For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

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 Training Manager

Genesys Training Manager allows companies to create, manage, and schedule multiple agent training activity and team meeting and one-to-one's automatically in WFM. The training scheduling process can include rooms and trainers or any combination of agent, room, and training. For team meetings and one-to-one's, this automatically includes the manager. A browser-based Web portal 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 their web portal. This automatically updates Training Manager with who has attended, and where there any non-attendees these can be "mopped-up" automatically as part of the scheduling process.

Intended Audience

- This document is primarily intended for system administrators or other individuals who install the Genesys Training Manager.

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, contact Genesys Technical Support at the following regional numbers:

Region	Telephone	E-Mail
North America and Latin America	+888-369-5555 (toll-free) +506-674-6767	support@genesyslab.com
Europe, Middle East, and Africa	+44-(0)-1276-45-7002	support@genesyslab.co.uk
Asia Pacific	+61-7-3368-6868	support@genesyslab.com.au
Malaysia	1-800-814-472 (toll-free) +61-7-3368-6868	support@genesyslab.com.au
India	1-800-407-436379 (toll-free) +91-(022)-3918-0537	support@genesyslab.com.au
Japan	+81-3-6361-8950	support@genesyslab.co.jp
Before contacting technical support, refer to the <i>Genesys Technical Support Guide</i> 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.

Genesys

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>.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *Genesys Supported Operating Environment Reference Manual*
- *Genesys Supported Media Interfaces Reference Manual*

Genesys product documentation is available on the:

- Genesys Technical Support website at <http://genesyslab.com/support>.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

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:

42gp_icg_aspect-wfm_08-2010_v4.2.001.01

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 <i>Genesys Migration Guide</i> for more information. Do <i>not</i> use this value for this option. A <i>customary and usual</i> 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. This convention includes: - 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. - The values of options. - Logical arguments and command syntax. - Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command	Select the Show <code>variables</code> on screen check box. In the <code>Operand</code> text box, enter your formula. Click <code>OK</code> to exit the <code>Properties</code> dialog box. T-Server distributes the error messages in <code>EventError</code> events. If you select <code>true</code> for the <code>inbound-bsns-calls</code> option, all established inbound calls on a local agent are considered business calls. Enter <code>exit</code> on the command line.

	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.	<pre>smcp_server -host <confighost></pre>



Chapter

2 Installation Guide

Required Files

- Database Backup File (SKM.bak)
- Application Install File for the Client PC (GenesysTrainingManagerSetup.msi)
- IIS Files (SkillsManagerWS and SkillsPortal folders)

Prerequisites

- SQL Database Server (2000 standard edition or higher) [2005 is recommended]
- IIS Web Server (IIS6 or higher)
- Front-end PC (Windows XP Pro or higher running .NET 2.0)
- Hostname and port of Genesys API WFM system (connected via the Client PC)

Database Installation

Copy the database backup file SKM.BAK to a location on your SQL Server. This .BAK file contains a vanilla database for the Training Manager application. You must restore this onto your SQL Server.

When restoring the database, you should name the data file as SKM.mdf and the log file as SKM_log.ldf.

By default, the install files come with the following SQL connection parameters:

- SQL Login "SLS"
- SQL Password "515"

When you restore the SKM.bak file to your SQL Server, make sure you create the above login so that it has access to the SKM database (with db_owner also selected). If you get an error message saying "SLS" already exists, remove it from the SKM database and re-create it under the security tab in your SQL Server.

File Installation (IIS and Client)

On IIS - Copy the Folders SkillsManagerWS and SkillsPortal to a suitable working location on your IIS Server. You will need to ensure that IIS has the appropriate permissions to access and run the applications on these folders.

NOTE: For simplicity you may want to copy these folders under the C:\inetpub\wwwroot folder in your lab/demo environments as IIS may already be configured to run scripts from there.

Internet Information Services (IIS) Configuration - Skills Manager Web Service

1. Go to your IIS Server.
2. Open IIS and right-click on the Default Web Site Node.
3. Select New -> Virtual Directory.
4. Click Next.
5. Under Alias, enter SkillsManagerWS and click Next.
6. Under Virtual Application permissions, make sure Read and Run Scripts are ticked.
7. Browse for the Skills Manager Folder and select it.
8. Click Next and Finish to create the Webservice.

You should now have a screen similar to the one below in Figure 1 (in IIS6). If you are using IIS7, the screen layout will be different.

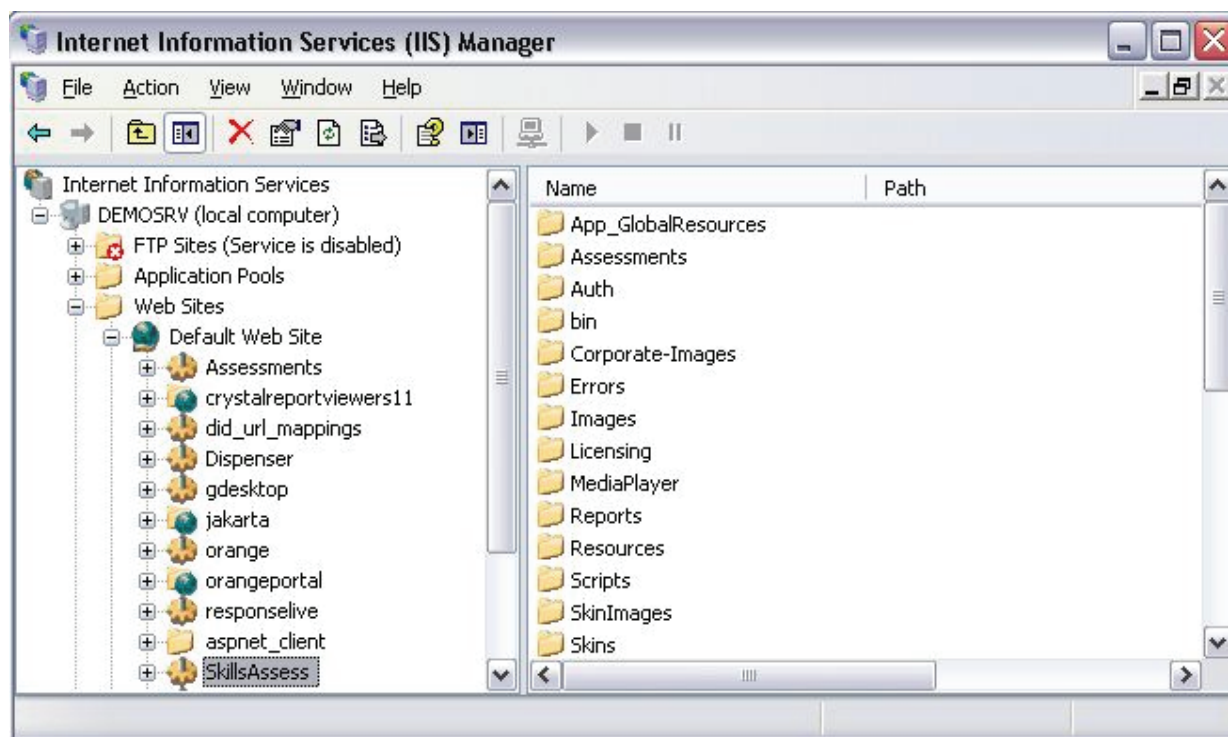


Figure 1: Internet Information Services (IIS) Manager

9. Right-click on SkillsManagerWS in IIS and go to the Documents Tab.
10. Ensure the Enable Default Content Page is ticked.
11. Under this, make sure that the Default.aspx is included in the list. See Figure 2.

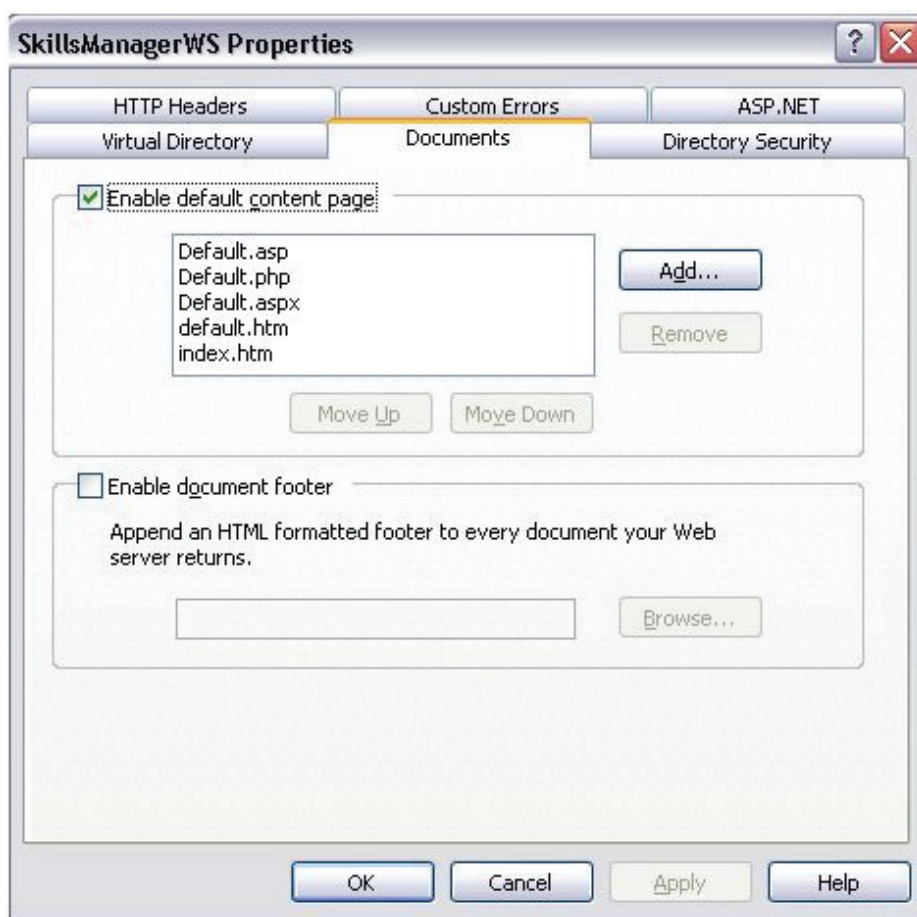


Figure 2: SkillsManager WS Properties Dialog Box

Finally, check that the ASP.NET tab has the version set to 2.0 and press OK. Repeat the above for the SkillsPortal folder. This completes the IIS configuration.

Both the SkillsManagerWS and SkillsPortal folders contain a Websettings.Configuration file. These include database connection strings and any relevant Application logs. Ensure these are set up to reflect your environments.

Diagnostics/IIS and Database Check

1. Open a web browser and navigate to the SkillsManager Web service (or right-click on the SkillsManagerWS folder within IIS and select Browse).
2. Select the Diagnostics link. This will help to verify that the database is correct and up to date. The screen might look different depending on the version number you are installing. See Figure 3.

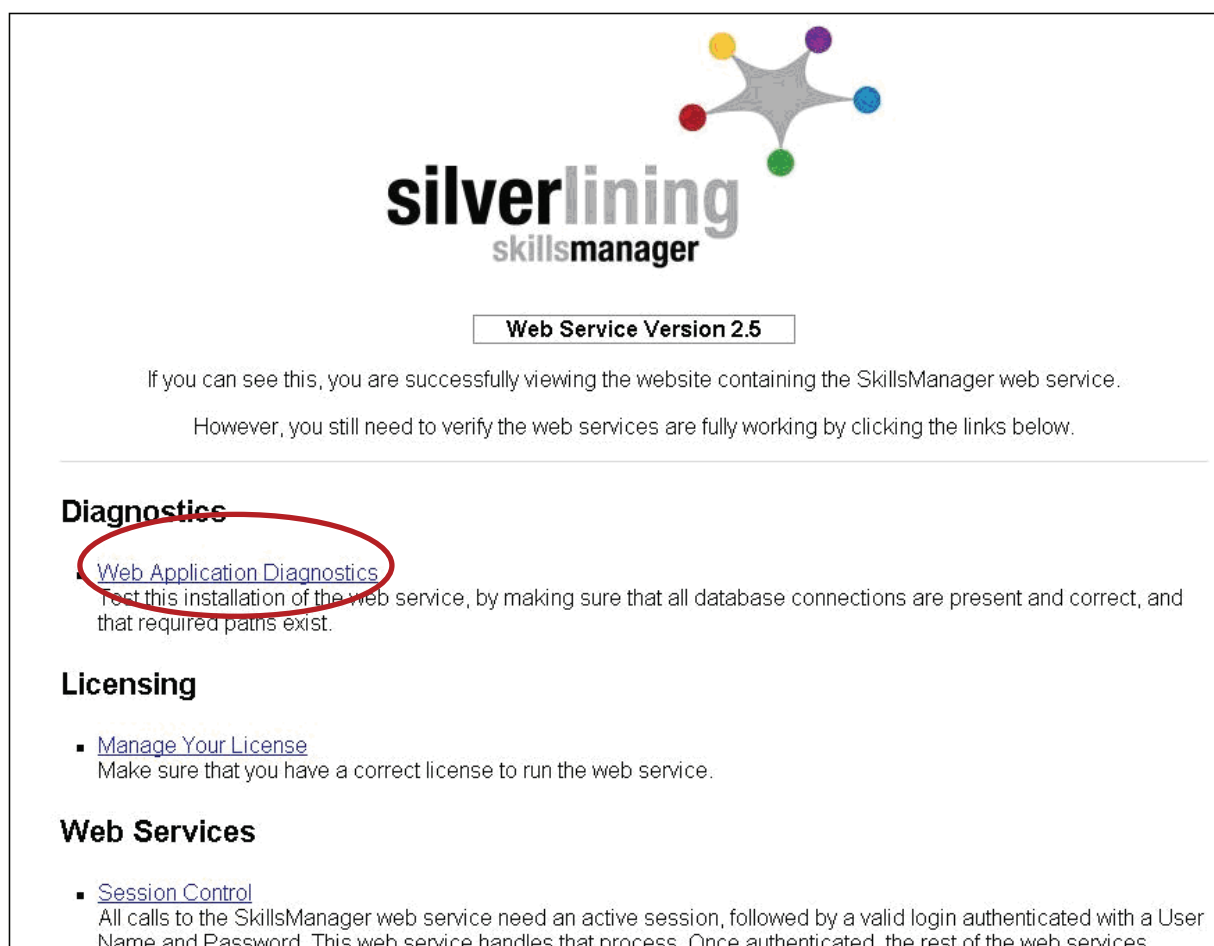


Figure 3: SkillsManager Web Service

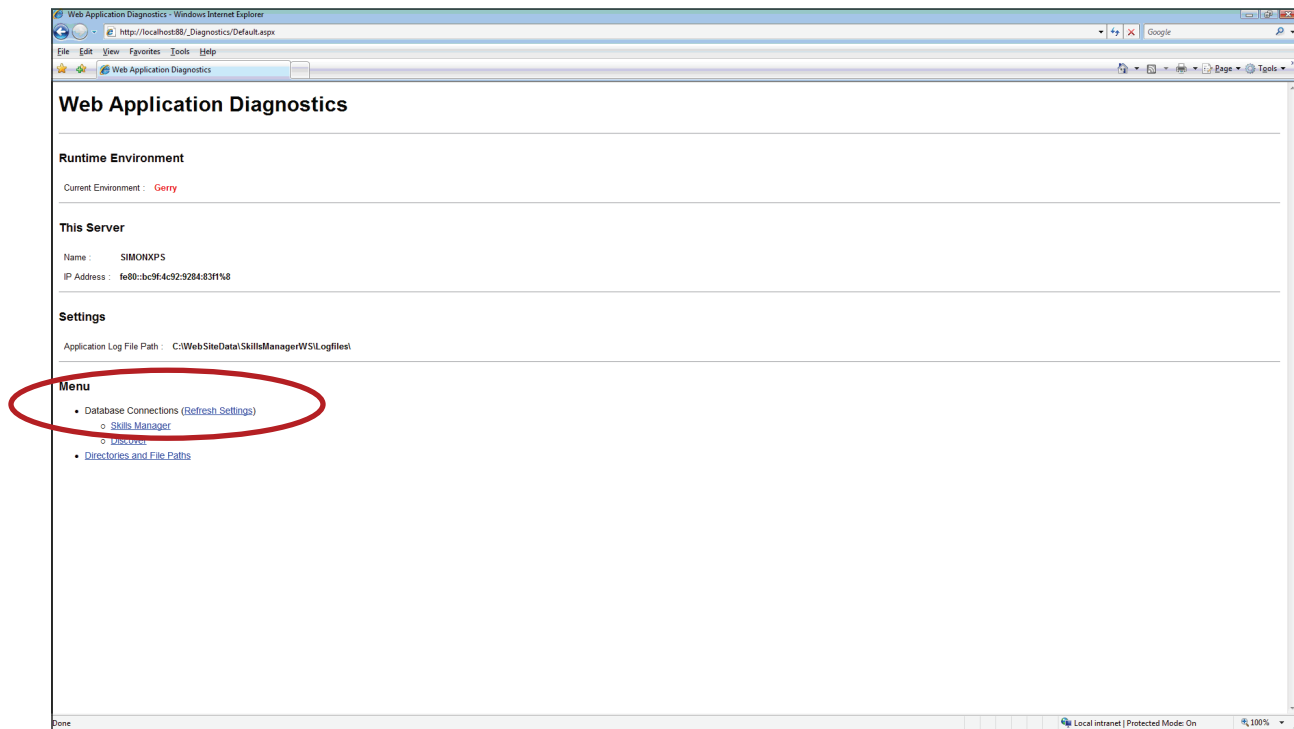


Figure 4: Skills Manager Link

3. Select the **Skills Manager** link (as shown above in Figure 4). You should then get the following screen shown below in Figure 5 (with green checkmarks to indicate successful database connections and version).

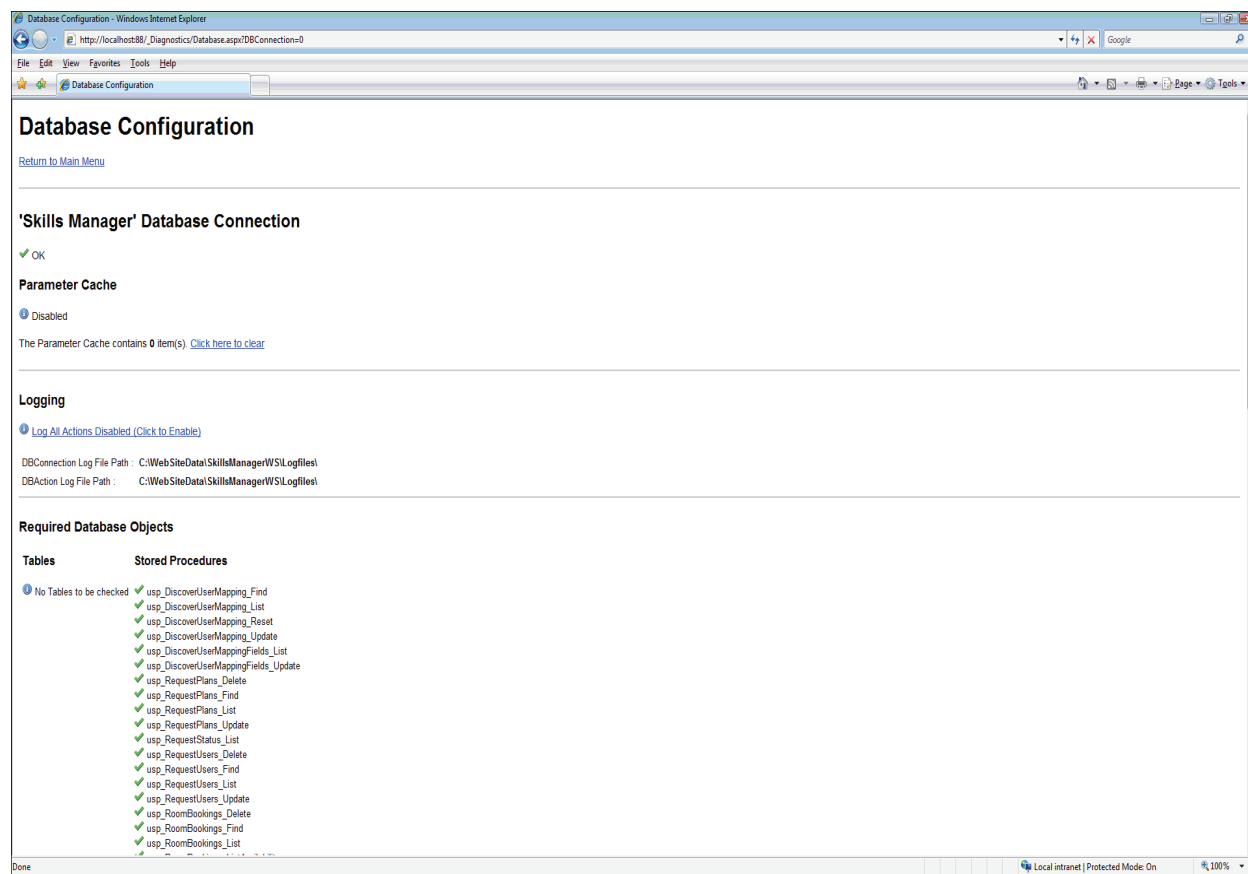


Figure 5: Database Configuration Dialog Box

4. Close this webpage.

Installing and Running the Application

Installing the Application

1. On the Client PC, copy the **GenesysTrainingManagerSetup.msi** file onto the Client PC.
2. Double-click the file to install the application. Two desktop icons will appear:
 - Training Manager
 - Training Manager Configuration Utility

The latter is used to configure the webservice connections. Figure 6 is an example of this screen.

The image shows a Windows-style dialog box titled "Genesys Training Manager Configuration Utility". It contains four configuration fields: "Web Service URL" with the value "http://localhost/SkillsManager/WS/" and a description "Location of the main SkillsManager Web Service e.g. http://your-server/SkillsManager/WS/"; "Proxy Server URL (Optional)" which is empty, with a description "Location of your proxy server used for both SkillsManager Web Service and WFM APIs"; "Web Service Connection Timeout" with the value "25000" and a description "Time (in milliseconds) to wait when connecting to the SkillsManager Web Service."; and "Web Service Authentication" with an unchecked checkbox for "Use NTLM (Integrated Windows Authentication)" and a note "Leaving this unticked will assume Anonymous Authentication". At the bottom right are "OK" and "Cancel" buttons.

Figure 6: Genesys Training Manager Configuration Utility

3. In the screen represented by Figure 6, you will need to specify the Web Service URL which should point to the SkillsManagerWS that was setup in IIS.

Once you have completed this step, you are ready to run the application.

Running the Application

1. From the Client PC, double click the TrainingManager application desktop icon.

All of the login details will be blank with the first time you launch the application.

To log into the application, you must use a suitable Genesys WFM login that has access to the Master Schedule and Scenarios. Figure 7 is an example:



Figure 7: Genesys - Login

2. Press OK and you should then have the Main Application screen.

In the Login screen, the Port is the Genesys API WFM port number. These settings will be specific to your Genesys WFM environment.