Genesys

Training Manager 8.5.546

Manual Installation Guide

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Table of Contents

Preface

Welcome to the *Training Manager* 8.5.546 *Installation Guide.* This document has been designed to provide instructions for an administrator to install the Training Manager application.

This document is valid only for the 8.5.546 release of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Customer Care 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 6.

About Genesys Training Manager

Genesys Training Manager is a solution that enables contact centers to automatically build, schedule and manage multiple agent training plans within Genesys WFM.

The solution automatically builds customized training plans that account for agent needs, service level impact, the availability of agents, trainer and classrooms.

It also provides an optimal online view of training schedules and can automatically track and reschedule training for agents who miss their courses.

Intended Audience

This document is primarily intended for system administrators or other individuals who intend to deploy Genesys Training Manager.

Making Comments on This Document

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Contacting Genesys Customer Care

If you have purchased support directly from Genesys, please read the Genesys Care Support Guide for On-Premises for complete information on how and when to contact Customer Care.

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 product documentation, Release Notes, and Product Advisories for this product, which are available on the Genesys Customer Care website after logging in at `https://genesyspartner.force.com/customercare/GenesysCommunityLogin`.

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1 Server Configuration

Installation Files

This section will detail the hardware and software requirements to set up the server portion of Genesys Training Manager. The client portion will be addressed in the Client Installation Chapter.

Database Server Software Prerequisites

- **Windows Server 2008 / 2008 R2 / 2012** (or higher) with latest available updates.
- **Microsoft SQL Server** of the following version / service pack (or higher)
  - **2008 SP4**
  - **2008 R2 SP3**
  - **2012 RTM**
  - **2014 RTM**
- Administrator access to the SQL Server.
- SQL Server Collation settings:
  - Database level collation: The collation setting of the Skills Management databases must match the collation of the SQL Server instance.
- SQL Server Analysis Services should be available on the server

Web Server Software Prerequisites

- **Windows Server 2008 / 2008 R2 / 2012** (or higher) with latest available updates.

- **Microsoft .NET Framework 4.0** with latest available updates including **KB 2656351** (if available for your OS) **and KB2468871**.
- **Internet Information Services (IIS)**
    - IIS must be configured to allow **ASP.NET v4.0.30319**. For more information see: http://msdn.microsoft.com/en-us/library/k6h9cz8h.aspx
    - The IIS server role should have **Windows Authentication** installed (through **Add Roles and Features** in **Server Manager**, then choosing **Web Server (IIS) > Web Server > Security** in **Server Roles**).
    - The application pools used for the web applications and services must allow 32 bit processes.
- **Microsoft Windows Identity Foundation (KB974405)** for the appropriate Windows version/architecture
    - For operating systems prior to Server 2012, the download required is available here: http://www.microsoft.com/en-gb/download/details.aspx?id=17331
        - Ensure you download the appropriate version for your web server.
    - For Windows Server 2012: Run **Server Manager**, select the **Add Roles and Features Wizard** and enable **Windows Identity Foundation 3.5** in the **Features** tab. Click **Next** and continue to complete the feature installation.
- The following additional runtimes must also be installed to support the Crystal Reports functionality:
    - **Java Runtime Environment** (http://java.com/en/download/index.jsp)
    - **Crystal Reports Runtime**, available from: http://downloads.businessobjects.com/akdlm/cr4vs2010/CRforVS_redist_install_32bit_13_0_12.zip
    - **Note**: **Crystal Reports** functionality is only supported for **Internet Explorer version 8** or above and the latest versions of other browsers (e.g. **Chrome**, **Firefox** and **Safari**).
- Administrator access to the server
- To allow the application to import and process Excel (XLSX) files, you must install the 32-bit version of the **Microsoft Access Database Engine 2010 Redistributable** and the **2007 Office System Driver: Data Connectivity Components** from
    - https://www.microsoft.com/en-us/download/details.aspx?id=13255

o   http://www.microsoft.com/en-
us/download/confirmation.aspx?id=23734

Browser support: Web applications are supported in Microsoft Internet
Explorer 8+ and latest versions of Chrome. If using Internet Explorer, ensure
that compatibility mode is disabled, and that it set to use the latest possible
standards mode.

Additional Application/Service Prerequisites

Any server or client machine which will be used to run the
PrePostCourseAssessmentHelper.exe must have Microsoft .NET 4.0
installed.

Trainers and Administrator can now request training in Portal. To allow the
selection of users from your WFM system, make sure that there is non-
firewalled connectivity between the web application server and the WFM
system.

Service account considerations

The user account used to run the Skills Management services must have log
on a service rights. You can use a local machine account for this provided
that:
- The computer is not a member of a domain
  or
- The computer is a member of a domain and there is no group policy
  defining which accounts are able to log on as a service.

In the latter case, you must use a domain account as the service account.

Local user account

To give an existing local user account permissions to logon as a service:
1. Run `secpol.msc` or open `Local Security Policy from Control Panel
   / Administrative Tools`
2. In the left pane, expand `Local Policies` and select `User Rights
   Assignment`
3. On the right, locate the `Logon as a service` entry, and double-click on
   it.

4. If the user account in question does not appear in the list, add it using the `Add User or Group` option.
5. Click `OK` to close the dialog.

Domain user account

Your domain administrator will need to allow the account in question permissions to log on as a service.

Database Installation

Creating the Databases

Start `SQL Server Management Studio` and create 3 new databases called TrainingManager, SkillsAssessor and PerformanceDNAReports. It is recommended that you create a new database user to allow the application to access these databases, although an existing user can be used if required. Grant the database user you have created/chosen the `db_owner` permission on each database.

Open the `DB Installation Files` folder from the copy on the web server.

Open the `makedb.config` file with `Notepad` or similar text editor.

- Edit the values in the connectionstrings for PlannerContext, OptimizerContext and ReportingContext (PlannerContext should be set to TrainingManager in the Catalog field and Optimizer should be set to SkillsAssessor in the catalog field) elements to match your environment:

- The `Data Source` value should be the name of your database server.

- The `Initial Catalog` should be the name of the appropriate database.

- The `User` should be the name of the database user you have created / chosen.

- The `Password` should be the password for the database user.

```
<connectionStrings>
    <add name="PlannerContext" connectionString="Data
    Source=***;Initial
    Catalog=TrainingManager;User=***;Password=***;MultipleAc
    tiveResultSets=True"
    providerName="System.Data.SqlClient" />
    …
</connectionStrings>
```

Save and close the file.

Run the `makedb.bat` application to create the structure of the databases.

IIS Authentication Modes

By default the Training Manager services and web sites should be run in IIS anonymous authentication mode. It is possible to edit the configuration of the services so that they run under Integrated Windows authentication mode.
Note: To enable the use of Integrated Windows Authentication on Training Manager services the Windows Authentication IIS Role Service must be installed on the web server.
If you wish to convert these services to Windows authentication mode perform the following steps for the `Services.Calendars`, `Services.Meetings`, `Services.MessageStorage`, `Services.Places`, `Services.Reporting`, `Services.Scheduling`, `Services.Skills`, `Services.Training`, `Services.Users`, `Services.Wfm` and `SkillsManagerWS` applications in `IIS`:

1. Right click on the service folder in the `IIS` hierarchy.

2. Ensure `Features View` is selected and Select the `Authentication` option.

3. Right click the `Anonymous Authentication` option and select `Disable`.

4. Right click the `Windows Authentication` option and select `Enable`.

Once the applications have been configured to use `Integrated Windows authentication` in `IIS` the services' `Web.config` files must be modified to reflect the changed authentication mode. The changes to the `Web.config` files must be made for all applications that begin with "Services.", i.e. excluding `SkillsManagerWS` and `SkillsPortal`.

Perform the following changes for each applicable service to enable `Integrated Windows authentication` mode:

1. Open the `Web.config` file located within the service folder on the web server using `Notepad` or similar text editor.

2. Locate the following element in the file:

```
<services>
   <service
   name="SilverLining.PerformanceDNA.Services.Meetings">
        <endpoint address="" binding="basicHttpBinding"
        bindingConfiguration="BasicServiceBinding"
        bindingNamespace="http://www.silverliningsolutions.co.uk
        /services/"
        contract="SilverLining.PerformanceDNA.Services.IMeetings
        " />
   </service>
</services>
```

3. Change the value of the bindingConfiguration element from "`BasicServiceBinding`" to "`WinAuthServiceBinding`" (note that the values entered into configuration files are case-sensitive).

4. Save your changes and close the file.

Select Application Pools from the IIS hierarchy. Right click on the Training Manager application pool and click **Recycle…**

Notes: **SkillsManagerWS** does not require the above **Web.config** file change to enable **Integrated Windows authentication** mode. The **SkillsPortal** application does not support **Integrated Windows authentication**.

Configuring the Invoker application

The Invoker application is required to support several Skills Management features.
To setup the Invoker application:
   1. Copy the Apps.Invoker folder from the release package to a suitable location on the web server.
   2. Open the Apps.Invoker/Apps.Invoker.exe.config file and locate the following web service endpoints:

```
<endpoint address="http://yourserver/Services.PersonalDevelopment
/PersonalDevelopment.svc"
<endpoint
address="http://yourserver/Services.DnaData/DnaService.svc"
<endpoint address="http://yourserver/Services.Wfm/Wfm.svc"
<endpoint
address="http://yourserver/Services.LearningItems/LearningItems.s
vc"
```

If you require the Personal Development Email Notification feature, ensure that you edit the PersonalDevelopment.svc endpoint to match the location of the PersonalDevelopment.svc service in your environment.
If you are using Skills Assessor with DNA, ensure that the DnaService.svc endpoint is updated to match the location of the DnaService.svc service in your environment.
If you require the Scheduling Training Requests via Portal feature, ensure that the Wfm.svc endpoint is updated to match the location of the Wfm.svc service in your environment.
If you require the automated learning item assignment feature (based on learning items associated with assessment content sections), ensure that the LearningItems.svc endpoint is updated to match the location of the LearningItems.svc service in your environment.

3. Locate the following elements:

```
<add key="LogPath" value="***" />
<add key="Verbosity" value="Warning" />
```

Modify the value of the LogPath element to a suitable location that you wish to use for storing log files. Edit the value of the verbosity element to the required level of detail for the application's logs (valid options are, from least logging to maximal logging):
- Off
- Fatal
- Error
- Warning (the default)
- Info
- Debug
- Trace

Save and close the file.
4. Start Windows Task Scheduler and create a new task set to run on your required schedule. The task should be set to run the Invoker application as its action. An argument must be specified when

running the Invoker application. This argument can be one of the following:

    a. DnaCubeEtl: use this argument if you are using Skills Assessor with DNA

    b. ProcessQueues: use this argument if you require the automated assigning of learning items feature (via assessment content sections) or the rules engine.

    c. WfmHierarchy: use this argument if you require the ability to create training requests via Portal

    d. PdrReviewWindow: use this argument if you require PDR review window notification e-mails

The task action should be listed as, e.g.:
"C:\Program Files (x86)\Invoker\Apps.Invoker.exe" DnaCubeEtl
Note: If you require more than one of these features, create a new scheduled for each required feature. Each scheduled task should have the Invoker application as its action with a different argument from the above list.

Web Service Installation

Configuring service database references

Skills Assessor database references

The following services require a reference to the Skills Assessor database.
- Services.Assessments
- Services.Auth
- Services.Events
- Services.Optimizer.Menu
- Services.Optimizer.Users
- Services.PersonalDevelopment
- Services.Questions
- Services.Settings
- Services.Tagging

Open each service's web.config file and locate the **OptimizerContext** connection string.

```
<add name="OptimizerContext" connectionString="Data Source=
***;Database=Optimizer;UID=***;PWD=***;Trusted_Connection=F
alse" providerName="System.Data.SqlClient" />
```

In each case, set the connection string information to match your environment, saving each config file after the change.

Training Manager database references

The following services require a reference to the Training Manager database.

- Services.Calendars
- Services.Meetings
- Services.MessageStorage
- Services.Places
- Services.Scheduling
- Services.Settings
- Services.Skills
- Services.Training
- Services.Users
- Services.Wfm

Open each service's web.config file and locate the **PlannerContext** connection string.

```
<add name="PlannerContext" connectionString="Data Sourc
e=***;Database=ReportingDB;UID=***;PWD=***;Trusted_Conn
ection=False" providerName="System.Data.SqlClient" />
```

In each case, set the connection string information to match your environment, saving each config file after the change.

Reporting database references

Only one service requires a reference to the Reporting database.

- Services.Reporting

Open the service's web.config file and locate the **ReportingDB** connection string.

```
<add name="ReportingDB" connectionString="Data Source=***;Database=Performance
DNAReports;UID=***;PWD=***;Trusted_Connection=False" />
```

Set the connection string information to match your environment, saving the file after the change.

DNA database references

Only one service requires a direct reference to the DNA database, although there should be one copy of this service per tenant.

- Services.DnaData

Open the service's web.config file and locate the DnaContext connection string.

```
<add name="DnaContext" connectionString="Data Source=***;Initial Catalog=DNADB
;UID=***;PWD=***;MultipleActiveResultSets=True" providerName="System.Data.SqlC
lient" />
```

Set the connection string information to match your environment, saving the file after the change.

Configuring logging

Most of the services include configurable elements for setting the location and verbosity of log files.

- Services.Assessments
- Services.Auth
- Services.Calendars
- Services.Dna
- Services.DnaData
- Services.Events
- Services.Iex
- Services.LearningItems
- Services.LmsInterface
- Services.Meetings
- Services.Optimizer.Users
- Services.PermissionManagement
- Services.PersonalDevelopment
- Services.Questions
- Services.Settings
- Services.Tagging
- Services.Wfm

Open each service's web.config file and locate the **appSettings** section.

```
<appSettings>
<add key="LogPath" value="***" />
<add key="Verbosity" value="Warning"/>
</appSettings>
```

In each case, set the LogPath value to the folder in which you want the services to place their log files (this folder must already exist), and optionally change the Verbosity setting to one of the supported logging verbosity levels (from least logging to maximal logging):

- Off
- Fatal
- Error
- Warning (the default)
- Info
- Debug
- Trace

Notes:

- Take care not to leave the service logging in 'trace' mode for extended periods as this may result in the creation of very large log files.
- Setting the logging level to Off will result in no log file entries being generated in the event of a system error.

Save each file after the change.

Configuring inter-service communications

Each of the following services has a reference to one or more other services. Open each service's web.config file and locate the **system.serviceModel** section.

If you want to use HTTPS rather than HTTP to access the services, you should locate the bindings section. There will be two bindings that are used by the services in Skills Management. For the bindings with the names BasicServiceBinding and WinAuthServiceBinding, change the lines:

```
<security mode="None">
<security mode="TransportCredentialOnly">
```

so that they both read:

```
<security mode="Transport">
```

In both cases, ensure the clientCredentialType entry for the transport element is left unchanged; it should be None for the BasicServiceBinding and Windows for the WinAuthServiceBinding.

For each referenced client service there will be one or more endpoint entries in the client section, which will resemble the following

```
<endpoint address="http://***/Services.Calendars/Calendars.svc" ...
```

In each case, update the endpoint of the services listed below each of the headings to match your environment – this will either be pointing to a service in the Services folder, or in some cases one inside Skills Assessor. If you changed the security modes to transport as above, ensure that you use HTTPS as the prefix for each address. Note that there may be other endpoints there that are configured programmatically. If an endpoint exists in the file and is not mentioned below, leave it unchanged.

- Services.Assessments
    - Services.Tagging

- Services.Calendars
    - Services.Users
    - Services.Places
    - Services.Training
    - Services.Meetings

- Services.Dna
    - Services.Settings
    - Services.DnaData

- Services.Events
    - Services.LearningItems
    - Services.Optimizer.Users
    - Services.Settings
    - Services.MessageStorage

- Services.LearningItems
    - Services.Dna
    - Both of the SkillsAssessor/WS endpoints
    - Services.Settings
    - Services.LmsInterface

- Services.LmsInterface
    - Services.Settings

- Services.MessageStorage
    - Services.Settings

- Services.Optimizer.Users
    - Services.Dna

- o   the SkillsAssessor/WS endpoint
- o   Services.Settings

- • Services.PermissionManagement
  - o   Services.Optimizer.Users
  - o   Services.Settings

- • Services.PersonalDevelopment
  - o   Services.Optimizer.Users
  - o   Services.Settings
  - o   Services.MessageStorage

- • Services.Questions
  - o   Services.Tagging

- • Services.Scheduling
  - o   Services.Iex
  - o   Services.Calendars
  - o   Services.Places
  - o   the SkillsManagerWS/WS endpoint
  - o   Services.Training
  - o   Services.Meetings

- • Services.Wfm
  - o   Services.Iex

SkillsManagerWS

Locate the **SkillsManagerWS** folder and open the **Web.Config** file and locate the following section:

```
<client>
<endpoint address="http://***/Services/Services.Meetings/Meetings.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="MeetingsService.IMeetings" name="MeetingsEndpoint" />
```

Update the endpoint address for the **Meetings.svc** to suit your environment. Save and close the file.
Open the **WebSettings.config** file. Open this file using **Notepad** or other suitable text editor. Locate the following section:

```
<DBConnections>
<SkillsManager>Server=***;Database=TrainingManager;UID=***;PWD=***;Trusted_Connection
=False</SkillsManager>
</DBConnections>
```

- Set **Server** to the database server's machine name.
- Set the **Database** to the **TrainingManager** database (can be left at default if you left the database name at its default value when creating the database).
- Set **UID** to the name of the database account that you granted **db_owner** permissions to for the **TrainingManager** database.
- Set **PWD** to the same account's password.

If you wish to map **Training Manager** users to **Skills Assessor** users locate the section:

```
<Optimizer
TenantId="***">http://***/SkillsAssessor/</Optimizer>
```

Edit this section with the value of your Skills Assessor tenant ID and the URL to Skills Assessor. The Tenant ID can be found by opening the Tenants table in your Skills Assessor database and identifying the Tenant ID of the row for your tenant.

- If you want to disable the Skills Assessor link functionality, remove **Optimizer** from the **Features** section at the top of the file.

Locate the **"LogFiles"** section in the file. In this section, there are several file paths, e.g.
C:\WebSiteData\Logs\SkillsManagerWS\
This path sets the log location for the **SkillsManagerWS** web application. In **Windows Explorer**, either do the following:

- Create a new folder on the web server at the path:
  C:\WebSiteData\Logs\SkillsManagerWS
  or
- Create a new folder on the IIS machine at any other preferred location.
  Then edit the file path in the **WebSettings.config** to match it.

SkillsPortal

In **Windows Explorer**, locate and open the **SkillsPortal** folder. Open the **WebSettings.config** file using **Notepad** or other text editor.
Locate the following section:

```
<!-- Database Settings -->
<DBConnection>Server=***;Database=TrainingManager;UID=xxx;PWD=xxx;Trusted_Connection=
False</DBConnection>
```

The value of **UID** and **PWD** (currently set to **xxx** for each) should be changed to the **Login** and **Password** of the SQL Server user created earlier. The "Database=**TrainingManager**" element will also need to be edited if a non-default name was used for the database.

Further down this file, there is a section called **"LogFiles"**. In this section, there are three file paths, e.g.

```
<!-- For logging any errors that happen during the operation of the website -->
<Application Type="PhysicalDirectoryPath" Flags="W">C:\WebSiteData\Logs\SkillsPortal\
</Application>
<!-- For logging any errors that happen when making connections to any database -->
<DBConnection Type="PhysicalDirectoryPath" Flags="W">C:\WebSiteData\Logs\SkillsPortal
\</DBConnection>
<!-- For logging any errors that happen when performing any C/R/U/D actions on the
database -->
<DBAction Type="PhysicalDirectoryPath" Flags="W">C:\WebSiteData\Logs\SkillsPortal\<DB
Action>
```

These are the paths to the folders where **SkillsPortal** will create log files. In **Windows Explorer**, do one of the following:

- Create a new folder on the web server at the path:
  C:\WebSiteData\Logs\SkillsPortal
  or

- Create a new folder on the web server at any other preferred location.
  Then edit the file path in the **WebSettings.config** to match it.

Save and close the **WebSettings.config** file.
Open the **Web.config** file with Notepad or similar text editor.
If you are planning to use Crystal Reports that require data from your Skills Assessor database locate the following section:

```
<add key="TenantId" value="***"/>
```

Edit the value of this element to match your Skills Assessor tenant ID. This can be identified by opening the Tenants table in your Skills Assessor database and identifying the Tenant ID of your tenant.
Locate the following section:

```
<add key="ReportsOptimizerDBConnectionString" value="Server=***;Database=Optim
izer;UID=***;PWD=***;Trusted_Connection=False"/>
```

Edit the **Server**, **Database**, **UID** and **PWD** values to match your Skills Assessor database connection settings.
Locate the following element:

```
<add key="ReportsFolder" value="C:\WebsiteData\Reports"/>
```

The value of this element should be set to the path of the folder you wish to use to hold uploaded Crystal Report files. If you already have a folder used to hold Crystal Reports for a Skills Assessor, the value of the **ReportsFolder** element in the Portal section should be set to match your existing Skills Assessor reports folder.
Ensure that this folder exists on the web server and that the Network Service account has full access permissions to this folder.
Locate the following elements:

```
<endpoint address="http://***/Services.Reporting/ReportAdmin.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="ReportingWS.IReportAdmin" name="ReportAdminEndpoint" />

<endpoint address="http://***/Services.Meetings/Meetings.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="MeetingsService.IMeetings" name="MeetingsEndpoint" />

<endpoint address="http://***/Services.MessageStorage/MessageStorage.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="MessageStorage.IMessageStorage" name="MessageStorageEndpoint" />

<endpoint address="http://***/Services.Places/Places.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="PlacesService.IPlaces" name="PlacesEndpoint" />

<endpoint address="http://***/Services.Users/Users.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="UsersService.IUsers" name="UsersEndpoint" />

<endpoint address="http://***/Services.Training/Training.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="TrainingService.ITraining" name="TrainingEndpoint" />

<endpoint address="http://***/Services.Calendars/Calendars.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="CalendarsService.ICalendars" name="CalendarsEndpoint" />

<endpoint address="http://***/Services.Wfm/Wfm.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="WfmService.IWfm" name="WfmEndpoint" />

<endpoint address="http://***/services/Services.Settings/Settings.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="SettingsService.ISettings" name="SettingsEndpoint" />
```

```
<endpoint address="http://***/services/Services.Auth/Auth.svc"
binding="basicHttpBinding" bindingConfiguration="BasicServiceBinding"
contract="AuthService.IAuth" name="AuthEndpoint" />
```

Edit the endpoint addresses to match the locations of each of the services as suits your environment.
Save and close the **web.config** file.

The installation and configuration of the database and web server components is now complete. For a reference to all the settings in the **WebSettings.config** files, see the **Server Configuration Files** section of this document.

Optional Branding Configuration

SkillsPortal

It is possible for your corporate logo and colours to be displayed when users log in to Portal. This can be enabled using the following steps:
- Create or source a company logo in JPEG format.
- In the **SkillsPortal** folder, there is a sub-folder called **Corporate-Images**. In this folder there is file called **company_logo.jpg**. Directly replace this file with the JPEG file of your company logo. Ensure the file that you add is called **company_logo.jpg**
- In the **WebSettings.config** file, there is a **Branding** section. Change the **ReColorShade** and **HeaderTitleColor** values to your preference.
- To enable OEM branding for SkillsPortal, open the **WebSettings.config** file from the SkillsPortal folder and locate the following element:

```
<Branding Theme="Default">
```

The theme value for this element can be one of the following:
- Default
- Genesys

Training Manager

To enable OEM branding for the **Training Manager** client, open the **WebSettings.config** file for the SkillsManagerWS service. Locate the branding element:

```
<Branding Theme="Default"/>
```

The theme value for this element can be one of the following:
- Default
- Genesys

3rd Party Authentication

The latest version of Skills Assessor and Portal now allow for a 3rd party authentication scheme. This requires a software component provided by a customer to authenticate against a customer's database of users. This facility is provided as an alternative to the STS configuration.
When configured correctly the login screen will re-direct to a customer provided web site to enter user credentials. The 3rd party application will need to call a Web service provided by Silver Lining with an authentication token when the user is authenticated. The 3rd Party Application will then re-direct back to a landing page which will validate the authentication token and log the user in to the system.

Skills Assessor Configuration

The following settings must be provided in the System Settings for Skills Assessor to enable 3rd Party Auth:

Optimizer URL	http://localhost/optimizer
Enable Third-Party Authentication	☑
Third-Party Authentication Login Page URL	http://localhost/mockslsauth/userlogin/authenticate ✳
Third-Party Authentication Logout Page URL	http://localhost/mockslsauth/userlogin/logout
User Field for Third Party Authentication	Job Title ▾

- The Optimizer URL field should be set to the Skills Assessor URL.
- Tick the box to enable 3rd Party Authentication, this makes the other fields appear.
- The 3rd Party Authentication login page.
- The 3rd Party Authentication logout page.
- The user field in Skills Assessor to use for choosing which user to login.

Portal Configuration (via Training Manager)

The following settings must be provided in the Portal Settings page of Training Manager to enable 3rd Party Authentication:

A drop down to select whether to use the Username or Employee Name for authentication.

- The 3rd Party Authentication login page.
- The 3rd Party Authentication logout page.

Email Messaging Service

The Email Messaging Service must be installed to support Training Manager's automated email notification functionality. Please see the **Email Messaging Service Installation Guide** for your WFM for instructions on how to install and configure this service.

Server Diagnostic Checks

Performing Diagnostics

Start a web browser and navigate to the **SkillsManagerWS** application, e.g. http://localhost/Services/SkillsManagerWS/ (or right-click the **SkillsManagerWS** folder within **IIS**, and then select **Browse**).
Click the **Web Application Diagnostics** link. This will help verify that the database is correct and up to date. The screen may look different depending on the version number you are installing.
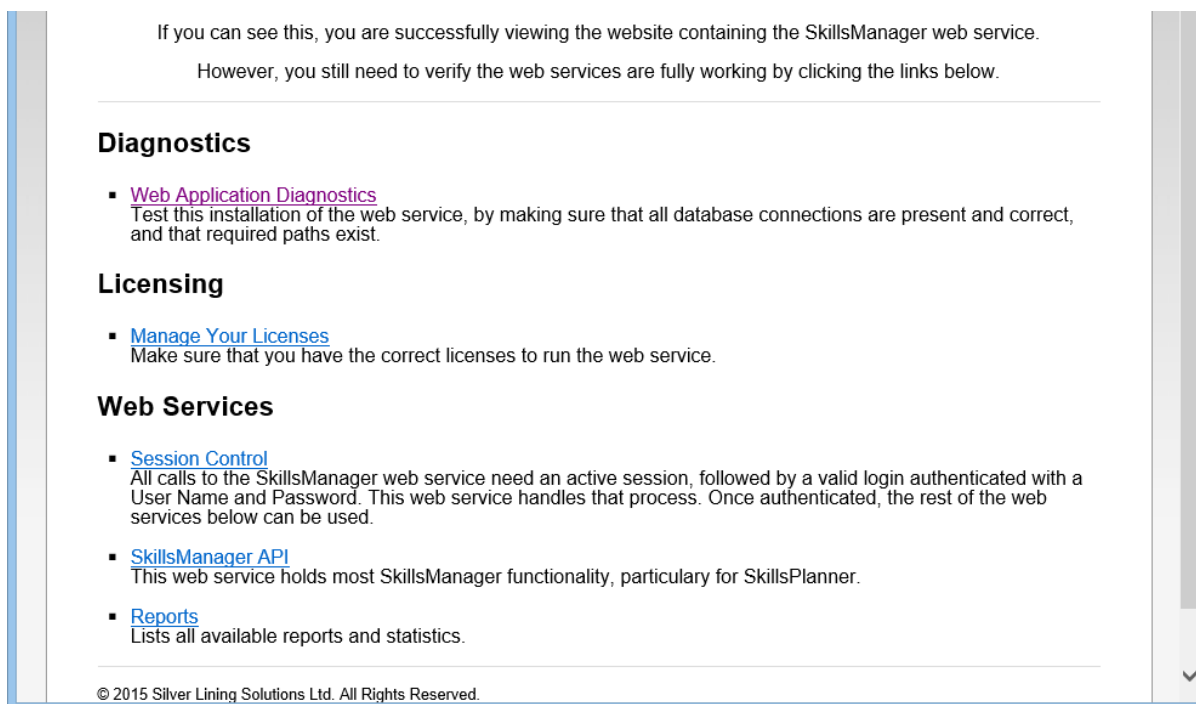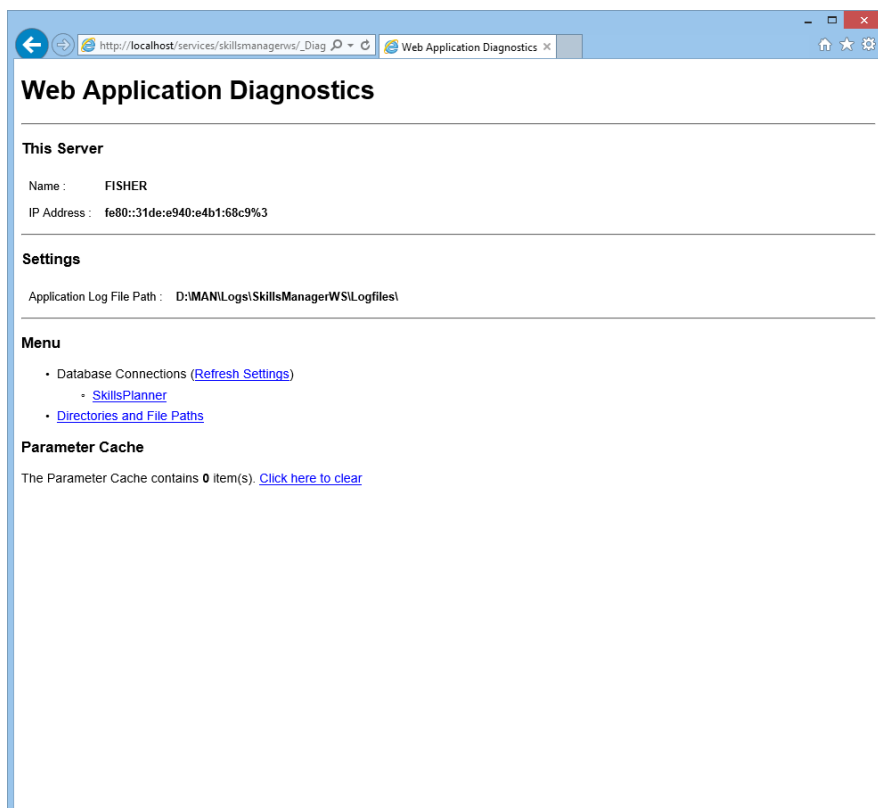
Figure 1: SkillsManagerWS Main Page

Figure 2: SkillsManagerWS Diagnostics

Click the **SkillsPlanner** link.

A test will be performed to make sure that the database connection is successful. If the test passed you should then see a screen showing green check marks.

If there are red crosses (e.g. as shown below) this means there is a problem with your database connection. In the example below, the web application could not login to the database.

'SkillsPlanner' Database Connection

✖ Login failed for user 'wronguser'.

at System.Data.SqlClient.SqlInternalConnection.OnError(SqlException exception, Boolean breakConnection, Action`1 wrapCloseInAction) at System.Data.SqlClient.TdsParser.ThrowExceptionAndWarning(TdsParserStateObject stateObj, Boolean callerHasConnectionLock, Boolean asyncClose) at System.Data.SqlClient.TdsParser.TryRun(RunBehavior runBehavior, SqlCommand cmdHandler, SqlDataReader dataStream, BulkCopySimpleResultSet bulkCopyHandler, TdsParserStateObject stateObj, Boolean& dataReady) at System.Data.SqlClient.TdsParser.Run (RunBehavior runBehavior, SqlCommand cmdHandler, SqlDataReader dataStream, BulkCopySimpleResultSet bulkCopyHandler, TdsParserStateObject stateObj) at System.Data.SqlClient.SqlInternalConnectionTds.CompleteLogin(Boolean enlistOK) at System.Data.SqlClient.SqlInternalConnectionTds.AttemptOneLogin(ServerInfo serverInfo, String newPassword, SecureString newSecurePassword, Boolean ignoreSniOpenTimeout, TimeoutTimer timeout, Boolean withFailover) at System.Data.SqlClient.SqlInternalConnectionTds.LoginNoFailover(ServerInfo serverInfo, String newPassword, SecureString newSecurePassword, Boolean redirectedUserInstance, SqlConnectionString connectionOptions, SqlCredential credential, TimeoutTimer timeout) at System.Data.SqlClient.SqlInternalConnectionTds.OpenLoginEnlist(TimeoutTimer timeout, SqlConnectionString connectionOptions, SqlCredential credential, String newPassword, SecureString newSecurePassword, Boolean redirectedUserInstance) at System.Data.SqlClient.SqlInternalConnectionTds..ctor(DbConnectionPoolIdentity identity, SqlConnectionString connectionOptions, SqlCredential credential, Object providerInfo, String newPassword, SecureString newSecurePassword, Boolean redirectedUserInstance, SqlConnectionString userConnectionOptions, SessionData reconnectSessionData) at System.Data.SqlClient.SqlConnectionFactory.CreateConnection (DbConnectionOptions options, DbConnectionPoolKey poolKey, Object poolGroupProviderInfo, DbConnectionPool pool, DbConnection owningConnection, DbConnectionOptions userOptions) at System.Data.ProviderBase.DbConnectionFactory.CreatePooledConnection (DbConnectionPool pool, DbConnection owningObject, DbConnectionOptions options, DbConnectionPoolKey poolKey, DbConnectionOptions

Figure 3: SkillsManagerWS Diagnostics

The following screen shows a successful application test.

Database Configuration

Return to Main Menu

'SkillsPlanner' Database Connection

✔ OK

Parameter Cache

✔ Enabled

Logging

ⓘ Log All Actions Disabled (Click to Enable)

DBConnection Log File Path :	**D:\MAN\Logs\SkillsManagerWS\Logfiles**
DBAction Log File Path :	**D:\MAN\Logs\SkillsManagerWS\Logfiles**

Required Database Objects

Tables	Stored Procedures
ⓘ No Tables to be checked	✔ usp_Algorithm_GetProgress
	✔ usp_Algorithm_Log_ListRuns
	✔ usp_Algorithm_Log_Query
	✔ usp_Algorithm_Log_QueryLast
	✔ usp_Algorithm_SetProgress
	✔ usp_AlgorithmMeeting
	✔ usp_AlgorithmOneToOne
	✔ usp_AlgorithmOptimised
	✔ usp_AlgorithmStrategies_List
	✔ usp_AlgorithmTemplateDays_List
	✔ usp_AlgorithmTemplateDays_Update

Figure 4: SkillsManagerWS Diagnostics

The information shows that the database connection has been successful, and confirms where Logging information will be written to.

Return to the main **SkillsManagerWS** page. Click the **Directories and File Paths** link (shown in the following screenshot).

If the logging folders have been set up correctly, you should see something similar to the following screenshot.

Directories and File Paths

Return to Main Menu

Physical Directories

Settings Path	Physical Path	Exists	Read	Write	Delete
~/LogFiles/Application	D:\MAN\Logs\SkillsManagerWS\Logfiles\	✔	ⓘ Untested	✔	✔
~/DBConnection	D:\MAN\Logs\SkillsManagerWS\Logfiles\	✔	ⓘ Untested	✔	✔
~/DBAction	D:\MAN\Logs\SkillsManagerWS\Logfiles\	✔	ⓘ Untested	✔	✔

Virtual Directories

No data found.

Physical Files

No data found.

Figure 5: SkillsManagerWS Diagnostics

This confirms that the web application is able to write logs to the folders. If the web application is not able to do this, you will see red crosses in the table. To resolve these you may need to set the correct permissions in Windows so that IIS can read and write to these locations.

Licensing

To set up your product license open a web browser and navigate to the **SkillsManagerWS** application, e.g. http://localhost/SkillsManagerWS/Default.aspx (or right-click the **SkillsManagerWS** folder within IIS, and then select **Browse**).
Click the **Manage Your Licenses** link. A form will appear allowing you to enter your Training Manager product license. Complete the form and click the **Add/Update License** button to add a new product license. Alternatively, if you have already added licenses, click one of the links at the top of the form to view and/or edit the existing license.

Manage Your Licenses

Click on any of the licenses below to view.

- www.blue.com

Add New License

⚠ Required fields

Please fill in the details you have been supplied by Silver Lining Solutions. If you do not have these details, please contact us.

Company Name	
Number of Licensed Users	
License Expiry Date (e.g. 31 December 2010)	
Host Name or IP Address (e.g. mycompany.com)	
Enter License Key	

Add/Update License

Return to the Web Service Home Page

Figure 6: Licensing

Genesys

2 Client Installation

Client Software Prerequisites

- **Windows XP SP2** (or higher)
- **.NET Framework 3.5** installed
- Minimum screen resolution of 1024x768. A screen resolution of 1280x1024 or above is recommended.
- A web browser for **Skills Portal**, e.g.
  - **Microsoft Internet Explorer 8+**
  - **Google Chrome**
  - **Mozilla Firefox**

Required Files

Client installation package (**GenesysTrainingManagerSetup_4.6.0.msi**).

Client Installation Procedure

On the client PC copy the **GenesysTrainingManager_8.5.460.msi** file to a suitable working location. Double-click the file and follow the installer instructions to install the application. A **Training Manager** icon will appear on your desktop**.**
The first time you run Training Manager you will be presented with a configuration screen as shown below. Enter the URL to the IIS virtual directory that contains the Training Manager services in the first field. The remaining fields can be left at their default value (if not using a proxy), or can be modified to suit your environment.
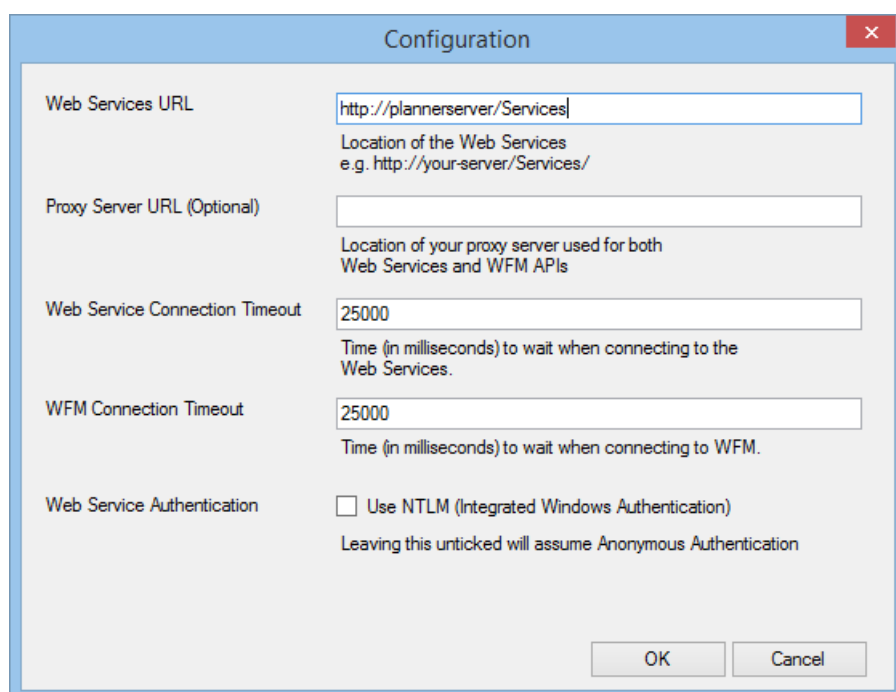
Figure 7: Training Manager Configuration Screen

Launching the Client

To run **Training Manager**, double-click the **Training Manager** desktop
icon. All of the login details on the **Login** screen will be blank the first time
you launch the application.

These details will typically be the same as what are entered in the **WFM
Configuration Utility** in your WFM environment.

On the Login screen, you will need to enter the following details which will
be specific to your WFM environment:

• Your user name and password for WFM

• Application name of your WFM system

Click **OK**. If login was successful you will see the main screen.

This confirms the successful completion of the **Training Manager** client
application installation and configuration.

IMPORTANT: To use Training Manager effectively, you must use a
supported WFM and WFM user account with access to the master schedule
and include all of the sites and teams for whom you want to schedule training
and meetings.

Server Configuration Files

SkillsManagerWS

This section details the **WebSettings.config** configuration file in the **SkillsManagerWS** web application.

WebSettings.config Sections

Inside the **SkillsManagerWS** folder, there is a file called **WebSettings.config**. You will need to edit this file to specify the database connection string and set up other configuration details.

In summary, the sections of the file contain the following important settings:

Section	Description
Features	Specifies what features are available to Training Manager users.
DBConnections/SkillsManager	Contains the database connection string. You will need to modify this to specify the name of the database you created earlier, as well as the user name and password used to access this database.
WebServices/Optimizer	Specifies the location of Skills Assessor, so that Training Manager can retrieve results from the system. (Requires Skills Assessor).
WebServices/AutoTeamUpdates	Specifies the location of an HR system that allows manager/team relationships to be automatically updated within Training Manager. This is an optional setting—whether it is used will be determined during the discussions prior to installation, and the setting should left at default unless otherwise specified.
LogFiles/Application LogFiles/DBConnection LogFiles/DBAction	Specify the paths of log file folders. The application is able to generate logs if anything goes wrong. Therefore, it is important to specify the paths of folders that exist on your server.
LoginMessage	Specifies a message that Training Manager displays to every user when users log in. To set a login message edit the element to match the following format: <**LoginMessage**>Your message here.</**LoginMessage**>

SkillsPortal

This section details the **WebSettings.config** configuration file in the SkillsPortal web application.

WebSettings.config Sections

Inside the **SkillsPortal** folder, there is a file called **WebSettings.config**. You will need to edit this file to specify the database connection string and set up other configuration details. This file is an XML-formatted file, and therefore needs to be edited with care.

In summary, the sections of the file contain the following important settings:

Section	Description
Database Settings	Contains the database connection string. You will need to modify this to specify the name of the database you created earlier, as well as the user name and password used to access this database.
AutoTeamUpdates	Specifies the location of an HR system that allows manager/team relationships to be automatically updated within Training Manager at a customer's site. This is an optional setting—whether it is used will be determined during the discussions prior to installation, and the setting should be left at as default unless otherwise specified.
LogFiles/Application LogFiles/DBConnection LogFiles/DBAction	Specify the paths of log file folders. The application is able to generate logs if anything goes wrong. Therefore, it is important to specify the paths of folders that exist on your server.
Branding/Colors/ReColorShade Branding/Colors/HeaderTitle	Specifies colour information that is used to apply branding to the Portal when users are logged in. The **ReColorShade** specifies the general colour scheme used throughout the Portal. The **HeaderTitle** specifies the colour of the text in the top right-hand corner of the browser. These colour values need to be specified as hex values, e.g. **#B3392A**.

Configuring Pre/Post-course Assessments (optional)

To use the pre/post course assessment functionality the user IDs in WFM, Training Manager and Skills Assessor must be synchronized, e.g. users' Login IDs in Skills Assessor must match their Employee ID as stored by both the WFM and Training Manager. Also, a small application must be installed on the web server to run on a schedule. This application is responsible for assigning Skills Assessor assessments when required based on the state of training requests in Training Manager.

To install the server application, double click the **PrePostCourseAssessmenthelperSetup_v4.6.0.exe** application
In the **Destination Folder** screen either edit the location of the install folder or click **Next**.
Click **Install** on the next screen.
Browse to the application's install folder.
Open the PrePostCourseAssessmenthelper.exe.config file in a text editor (e.g. Microsoft Notepad or similar).
Locate the element:

```
<setting name="PrePostCourseAssessmenthelper_PlannerSession_WS_Se
ssionControl" serializeAs="String">
      <value>http://localhost/SkillsManagerWS/WS/SessionControl.
asmx</value>
</setting>
```

Edit the URL to match the location of the `SessionControl.asmx` service in your environment.
Locate the element:

```
<setting name="PrePostCourseAssessmenthelper_PlannerAPI_WS_API" s
erializeAs="String">
     <value>http://localhost/SkillsManagerWS/WS/API.asmx</value>
</setting>
```

Edit the URL to match the location of the `API.asmx` service in your environment.
Locate the element:
```
<setting name="PrePostCourseAssessmenthelper_Tenants_WS_Tenants"
serializeAs="String">
     <value>http://localhost/SkillsAssessor/WS/Tenants.asmx</valu
     e>
</setting>
```

Edit the URL to match the location of the `Tenants.asmx` service in your environment. This service is located within your SkillsAssessor/WS/ folder.
Locate the element:

```
<setting name="PrePostCourseAssessmenthelper_Assessments_WS_Asses
sments" serializeAs="String">
     <value>http://localhost/SkillsAssessor/WS/Assessments.asmx<
     /value>
</setting>
```

Edit the URL to match the location of the `Assessments.asmx` service in your environment. This service is located within your `SkillsAssessor/WS/` folder.
Locate the element:

```
<setting name="PrePostCourseAssessmenthelper_Tests_WS_Tests" seri
alizeAs="String">
    <value>http://localhost/SkillsAssessor/WS/Tests.asmx</value>
</setting>
```

Edit the URL to match the location of the Skills Assessor `Tests.asmx` service
in your environment. This service is located within your `SkillsAssessor/WS/`
folder.
Locate the element:

```
<setting name="PrePostCourseAssessmenthelper_OptimizerUsers_WS_Us
ers" serializeAs="String">
    <value>http://localhost/SkillsAssessor/WS/Users.asmx</value>
</setting>
```

Edit the URL to match the location of the `Users.asmx` service in your
environment. This service is located in your `SkillsAssessor/WS/` folder.
Locate the element:

```
<!-- Optimizer Tenant -->
<add key="TenantId" value="1" />
```

Edit the value to match the Tenant ID in your SkillsAssessor environment.
This can be found by connecting to Microsoft SQL Server Management
Studio and opening the Skills Assessor `dbo.Tenants` table.
Save and close the file.
The Pre/Post Course Assessment Helper application can either be executed
manually or configured as a scheduled event to run on a pre-defined schedule.
It is recommended that this application is set up as a scheduled task.