Genesys

Training Manager 8.5.546

Manual Upgrade Guide

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Preface

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

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

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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 .

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 have a current deployment of Genesys Training Manager and intend to upgrade to 8.5.460.

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`.

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 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 *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`

Genesys

Chapter

1   Server Configuration

Installation Files

This section will detail what files are required to upgrade the server portion of Genesys Training Manager. The client portion will be addressed in the Client Installation Chapter.

Server Software Prerequisites

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)
    - o **2008 SP4**
    - o **2008 R2 SP3**
    - o **2012 RTM**
    - o **2014 RTM**
- Administrator access to the SQL Server.
- SQL Server Collation settings:
    - o 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
- An existing, working, version 8.5.+ (or above) database.

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 should install the 32-bit version of the **Microsoft Access Database Engine**

2010 Redistributable and the **2007 Office System Driver: Data Connectivity Components** from

- o   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+, latest versions of Chrome and Firefox. If using Internet Explorer, ensure that compatibility mode is disabled, and that it set to use the latest possible standards mode.

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.

Additional Application/Service Prerequisites

PrePostCourseAssessmentHelper.exe requires that Microsoft .NET 4.0 is installed.

Portal now has the ability for trainers and administrator to request training. To allow the selection of users from your WFM system, you should make sure that there is non-firewalled connectivity between your web application server and your WFM system.

Required Files

You should have a ZIP file containing the following files/folders:

- **DB Installation Files**

This contains the files required to install and upgrade the database

- **Services**
- **SkillsPortal**
- **Installation Guides**

Contains this document and the installation guide.

Training Manager Client Installer .MSI file

EmailMessagingServiceSetup_v4.6.0.msi

(Optional) SkillsManagerUpdaterSetup_v4.6.0.msi

Database Upgrade

Preparation

- Copy the **DB Installation Files** folder to the **SQL Server**
- Make sure that no-one is logged in and using **Training Manager**.
- IMPORTANT: Take a backup of your existing database.

Upgrade the databases

Note: The SkillsAssessor database connection details should be specified in all configuration files that request a database connection string for a database called 'Optimizer' or 'OptimizerContext'.

Start SQL Server Management Studio and create a new database called 'SkillsAssessor' if one is not already present. Grant the database user with dbo permissions on the TrainingManager and Reporting databases dbo permissions on the new SkillsAssessor 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 elements to match your environment. Ensure the catalog is set to the name of your existing Training Manager database and Reporting database (Note: the default name of the reporting database for version 3.5/3.6 is: 'ReportingDB'):

<connectionStrings>

<add name="PlannerContext" connectionString="Data Source=***;Initial Catalog=TrainingManager;User=***;Password=***;MultipleActiveResultSets=True" providerName="System.Data.SqlClient" />

…

</connectionStrings>

Save and close the file.

Run the makedb.bat application to upgrade the databases.

Web Application Upgrade

Backup the existing web application and set file permissions

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

Upgrade the application files

Note: If you already have an Skills Assessor instance installed you should still create the Services.Reporting web service ensuring that it is not in the same directory as the Skills Assessor Services.Reporting web service. Once both services are set up, they should be configured to use the same database (via the Web.config file as described below).

1. Locate the current application folder on the web server.
2. Open the SkillsPortal folder and delete its content
3. Copy the content of the SkillsPortal folder from the release package to the SkillsPortal folder on the web server
4. Repeat the above step for the each folder in the Services folder replacing the original content with the content of the appropriate folder from the release package. If there are any services in the release package that aren't already present on the web server, these should be copied also and converted to applications in IIS. The new services should use the same application pool as the existing ones.
5. If a bespoke corporate logo was previously applied (located in the Corporate-Images folder in the SkillsPortal), this will need to be restored from the backup copy of SkillsPortal after adding the new version of the SkillsPortal application.

Converting Folders to Applications in IIS

Open **IIS Manager**.

Browse to the Training Manager site/Services folder.

Perform the following steps for each folder within the Services directory that appears as a folder rather than an application:

1. Right click on the folder.

2. Click **Convert to Application**.

3. Click the **Select** button.

4. Set the Application pool to TrainingManager.

5. Click **OK**.

6. Click **OK**.

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**.

Web service configuration

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=Skills
Assessor;UID=***;PWD=***;Trusted_Connection=False" providerName="System.Data.S
qlClient" />
```

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 Source=***;Database=Training
Manager;UID=***;PWD=***;Trusted_Connection=False" providerName="System.Data.Sq
lClient" />
```

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

Note: 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.

Note: 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 the Skills Assessor application. 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

- o   Services.LmsInterface

- Services.LmsInterface
  - o   Services.Settings

- Services.MessageStorage
  - o   Services.Settings

- Services.Optimizer.Users
  - o   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_Conn
ection=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 **TrainingManager** 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**, either do 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 element:

```
<add key="ReportsOptimizerDBConnectionString" value="Server=***;Database=Skill
sAssessor;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 an Skills Assessor instance, 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 per 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
- Teleopti
- Genesys

1.1.1 TrainingManager

To enable OEM branding for the **TrainingManager** 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
- Teleopti
- Genesys

Configuring the Invoker application

The Invoker application is required to support several Skills Management features.

To setup the Invoker application:

- Copy the Apps.Invoker folder from the release package to a suitable location on the web server.
- 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.svc"
```

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.

- 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.

1. 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:

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

> o ProcessQueues: use this argument if you require the automated assigning of learning items feature (via assessment content sections) or the rules engine.
>
> o WfmHierarchy: use this argument if you require the ability to create training requests via Portal
>
> o 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.

The installation and configuration of the database and web server components is now complete.

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:

Figure 1: 3rd Party Authentication in Skills Assessor

- A Tick box to enable 3rd Party Auth, this makes the other fields appear.
- The 3rd Party Auth login page.
- The 3rd Party Auth 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 Auth:

Figure 2: 3rd Party Authentication in Training Manager

- A drop down so you can choose whether to user the user name or employee name for authentication.
- The 3rd Party Auth login page.
- The 3rd Party Auth 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/SkillsManagerWS/Default.aspx (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.

If you can see this, you are successfully viewing the website containing the SkillsManager web service.

However, you still need to verify the web services are fully working by clicking the links below.

Diagnostics

- Web Application Diagnostics
  Test this installation of the web service, by making sure that all database connections are present and correct, and that required paths exist.

Licensing

- Manage Your Licenses
  Make sure that you have the correct licenses to run the web service.

Web Services

- Session Control
  All calls to the SkillsManager web service need an active session, followed by a valid login authenticated with a User Name and Password. This web service handles that process. Once authenticated, the rest of the web services below can be used.

- SkillsManager API
  This web service holds most SkillsManager functionality, particulary for SkillsPlanner.

- Reports
  Lists all available reports and statistics.

Figure 3: SkillsManagerWS Main Page
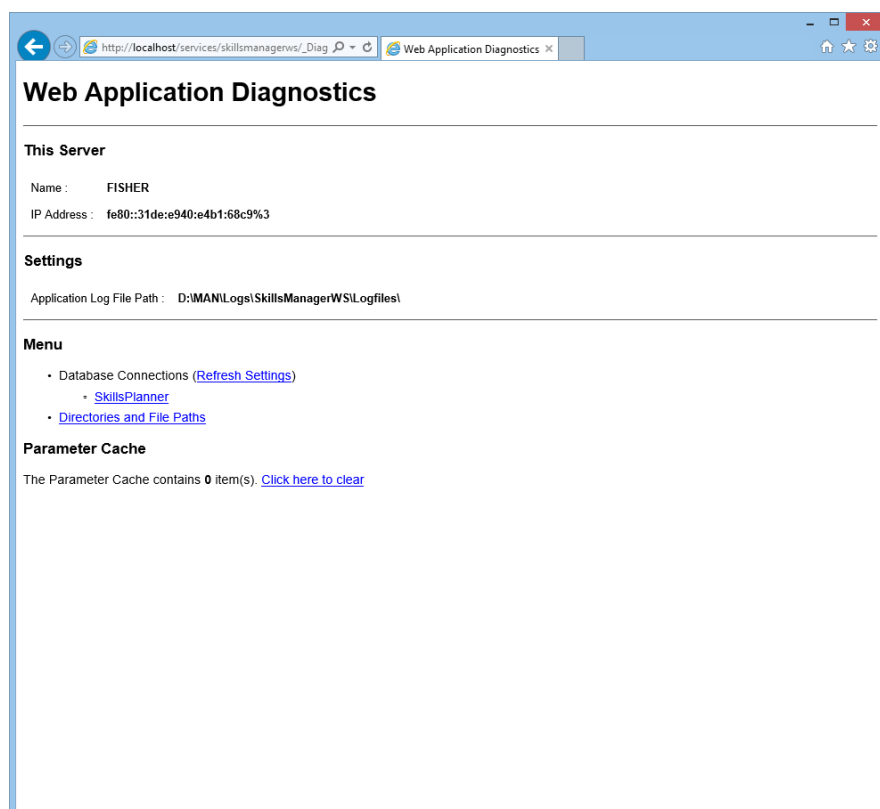
Figure 4: SkillsManagerWS Diagnostics

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. in the below clip) this means there will be a problem with your database connection. In the example below, the web application couldn't login to the database.

'SkillsPlanner' Database Connection

✖ Login failed for user 'sls'.

at System.Data.SqlClient.SqlInternalConnection.OnError(SqlException exception, Boolean breakConnection) at
System.Data.SqlClient.TdsParser.ThrowExceptionAndWarning(TdsParserStateObject stateObj) 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, Boolean
ignoreSniOpenTimeout, Int64 timerExpire, SqlConnection owningObject) at
System.Data.SqlClient.SqlInternalConnectionTds.LoginNoFailover(String host, String newPassword, Boolean redirectedUserInstance,
SqlConnection owningObject, SqlConnectionString connectionOptions, Int64 timerStart) at
System.Data.SqlClient.SqlInternalConnectionTds.OpenLoginEnlist(SqlConnection owningObject, SqlConnectionString
connectionOptions, String newPassword, Boolean redirectedUserInstance) at
System.Data.SqlClient.SqlInternalConnectionTds..ctor(DbConnectionPoolIdentity identity, SqlConnectionString connectionOptions,
Object providerInfo, String newPassword, SqlConnection owningObject, Boolean redirectedUserInstance) at
System.Data.SqlClient.SqlConnectionFactory.CreateConnection(DbConnectionOptions options, Object poolGroupProviderInfo,
DbConnectionPool pool, DbConnection owningConnection) at
System.Data.ProviderBase.DbConnectionFactory.CreatePooledConnection(DbConnection owningConnection, DbConnectionPool pool,
DbConnectionOptions options) at System.Data.ProviderBase.DbConnectionPool.CreateObject(DbConnection owningObject) at
System.Data.ProviderBase.DbConnectionPool.UserCreateRequest(DbConnection owningObject) at
System.Data.ProviderBase.DbConnectionPool.GetConnection(DbConnection owningObject) at
System.Data.ProviderBase.DbConnectionFactory.GetConnection(DbConnection owningConnection) at
System.Data.ProviderBase.DbConnectionClosed.OpenConnection(DbConnection outerConnection, DbConnectionFactory
connectionFactory) at System.Data.SqlClient.SqlConnection.Open() at SilverLining.DBAccess.DBConnection.GetConnection(Boolean
pLogException) at SkillsManagerWS.Diagnostics_Database.Page_Load(Object sender, EventArgs e) in C:\Dev\Skills
Manager\SkillsManagerWS_Diagnostics\Database.aspx.vb:line 43

Figure 5: SkillsManagerWS Diagnostics

The following page 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 :   C:\WebSiteData\SkillsManagerWS\Logfiles\

DBAction Log File Path :   C:\WebSiteData\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
	✔ usp_AlgorithmTemplates_Delete
	✔ usp_AlgorithmTemplates_Find
	✔ usp_AlgorithmTemplates_List
	✔ usp_AlgorithmTemplates_Update

Figure 6: SkillsManagerWS Diagnostics

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

Click the **Directories and File Paths** link (shown in the below 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/Eddie	C:\WebSiteData\SkillsManagerWS\Logfiles\	✔	ⓘ Untested	✔	✔
~/DBConnection/Eddie	C:\WebSiteData\SkillsManagerWS\Logfiles\	✔	ⓘ Untested	✔	✔
~/DBAction/Eddie	C:\WebSiteData\SkillsManagerWS\Logfiles\	✔	ⓘ Untested	✔	✔

Virtual Directories

No data found.

Physical Files

No data found.

Figure 7: 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.

2   Client Installation

To upgrade the client application it is necessary to uninstall the original version then install the new version via the .msi file in the release package.

Uninstall the original Training Manager Client Application

To uninstall the old version of the Training Manager Client application follow these instructions:

In Windows 7:

- Click **Start**
- Click **Control Panel**
- Click **Programs and Features**
- Locate the Training Manager application within the list of installed programs
- Click Uninstall
- Follow the wizard to uninstall the client application

Install the new Training Manager Client Application

Installation Files

This section lists the files required to install the Training Manager client application.

Client Software Prerequisites

- Windows 7 (or higher)
- .NET Framework 2.0 installed
- Minimum screen resolution of 1024x768. A screen resolution of 1280x1024 or above is recommended.
- A web browser for **SkillsPortal**, e.g.
    - Minimum of **Internet Explorer 8** or higher.
    - Google Chrome.
    - Mozilla Firefox.

Required Files

Client installation package (**GenesysTrainingManagerSetup_v8.5.460.msi**).

Client Installation Procedure

On the client PC copy the **GenesysTrainingManagerSetup_v8.5.460.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. If the services have been installed to allow HTTPS connectivity, then use https://YourWebServer/Services
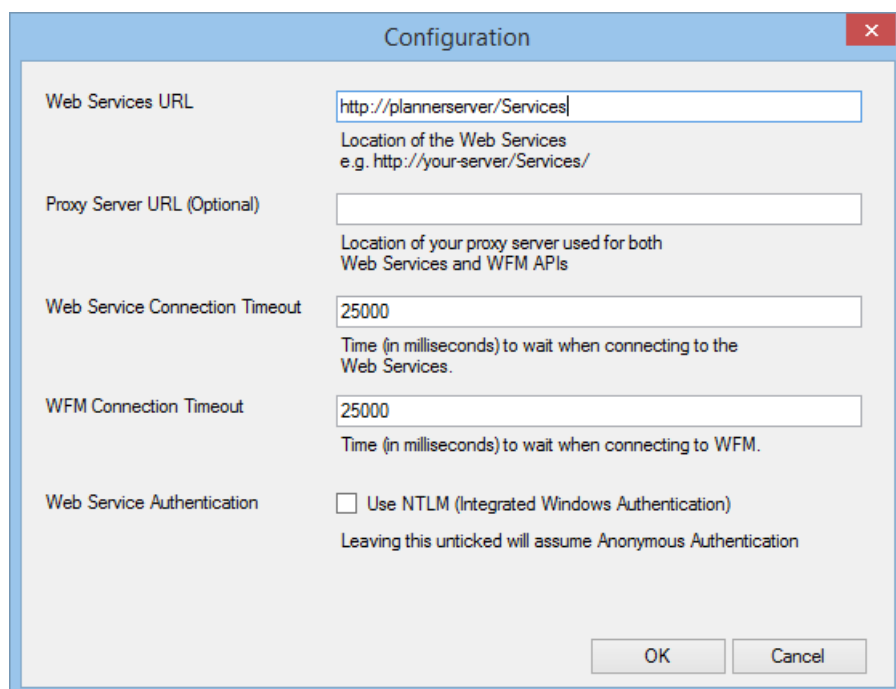
Figure 8: Training Manager Configuration Utility

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.

You should enter the account details that are required to login to your WFM in this screen. For further details, please consult the Training Manager user guide for the specific WFM that you are using from the documentation files in the build folder. You will see an option for connecting via HTTPS.

After entering your WFM login details, click **OK**, and upon a successful login, you will see the main screen.

This confirms the successful completion of the Training Manager Client application upgrade.

Configuring Pre/Post-course Assessments (optional)

Note: This functionality requires that Skills Assessor is installed and configured correctly.

To use the pre/post course assessment functionality the user IDs in WFM, Training Manager and Skills Assessor must be synchronised, e.g. users' Login IDs in Skills Assessor must match their Employee ID as stored by both the WFM and Training Manager. Secondly, 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 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_SessionControl" serial
izeAs="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" serializeAs="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</value>
</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_Assessments" 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" serializeAs="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_Users" serializeAs="St
ring">
      <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 Skills Assessor 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 app can either be executed manually or configured as a scheduled event to run on a pre-defined schedule. It is recommended that this app is set up as a scheduled task.