Genesys Skills Management
Automated Install and Upgrade Guide

Prerequisites

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Prerequisites

If you are upgrading Skills Management, ensure that all Skills Management services on the web servers have been stopped prior to the upgrade, including IIS application pools and the Skills Management Invoker Service.

Database Server Software Prerequisites

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

- **Microsoft SQL Server** of the following version / service pack (or higher)

    - **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 Agent should be running on the server.

Web Server Software Prerequisites

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

- **Microsoft .NET Framework 4.7.2** 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:

    - For **Crystal Reports Runtime**, download **SP20** from: https://www.tektutorialshub.com/crystal-reports/how-to-download-and-install-crystal-report-runtime/#hownbspto-download

    - The following Server Roles/Features are required:

        - Server Roles

- Web Server (IIS)

  - Web Server

    - Security

      - Windows Authentication

    - Application Development

      - ASP .NET 3.5

      - ASP .NET 4.5

      - Application Initialization (for Server 2012+)

- Features

  - .NET Framework 3.5

  - .NET Framework 4.5 features

    - .Net Framework 4.5

    - ASP.NET 4.5

    - World Wide Web Services

      - Common HTTP features

        - Static content

    - WCF Services

      - HTTP Activation

      - Named Pipe Activation

- Sticky sessions must be enabled for load balanced environments where there is more than one web server.

- If you are installing the Training Manager client, note that both the Training Manager client and Skills Management web services must have network connectivity to the WFM.

Browser support: Web applications are supported in latest versions of Microsoft Internet Explorer, 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.

> ### Tip
> If your default web site does not have a port 80 HTTP binding, you must create one prior to running the installer. The binding can be safely removed after the install (provided you install the site with HTTPS enabled).

Service account considerations

The user account used to run the Skills Management services must have both **Log on as a batch**

job and **Log on as 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 batch job / 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 batch job and 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 batch job** entry, and double-click 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 box.
6. Double-click the **Logon as a service** entry.
7. If the user account in question does not appear in the list, add it using the **Add User or Group** option.
8. Click **OK** to close the dialog box.

Domain user account

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

If you are installing Skills Management in a multi-server environment, a domain account is recommended for ease of configuration.

Azure

If you are installing PDNA to Azure web application, ensure that the client machine running the powershell scripts must have .NET 4.7.2 installed.

Email Messaging Service

If upgrading from a release prior to v9.x the old Email Messaging Service will need to be uninstalled.

As part of the v9.x release this functionality is included within the main installer and is configured through the user interface.