



Skills Assessor 8.1.127

Upgrade Guide from 8.1.125

(IIS6)

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Preface

Welcome to the *Genesys Skills Assessor 8.1.127 Upgrade Guide for IIS6*. This *Upgrade Guide* has been designed to allow an administrator to upgrade the Skills Assessor application.

This document is valid only for the 8.1.127 release of this product.

Note: For versions of this document created for other releases of this product, visit the [Genesys documentation website](#)

About Genesys Skills Assessor

Genesys Skills Assessor allows companies to use a combination of online tests, self-assessment, and observational feedback to assess the level of agent skills across their contact center. Agent skill levels are stored in a central skills database and can be combined with performance data from legacy systems—for example, CRM sales data and Learning Management System courses.

Centralizing agent skills information allows contact centers to build a “DNA profile” of skills for each agent to identify:

- What are the “must have” and “nice to have” skills for each job type?
- Who really knows what across the contact center?
- Who has what skills and skill levels?
- Who requires what type of training, and when?

Skillsroute enables companies to create and manage multiple agents, skills, and skill levels in Configuration Manager. Skill assessment results exported directly from Skills Assessor can be used to optimize multi-skilling and call routing, to ensure that the customer is always presented to the most knowledgeable agent available.

Intended Audience

This document is primarily intended for system administrators or other individuals who install Genesys Skills Assessor.

Making Comments on This Document

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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.
- The Release Notes, Product Advisories, and all technical documentation for this product, which are available on the Genesys Documentation website at <http://docs.genesys.com>.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthand for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

`81skillsassessor_user_08-2013_v8.1.101.00`

You will need this number when you are talking with Genesys Technical Support about this product.

Type Styles

The Type Styles table describes and illustrates the type conventions that are used in this document.

Type Styles

Type Style	Used For	Examples
Italic	<ul style="list-style-type: none"> Document titles Emphasis Definitions of (or first references to) unfamiliar terms Mathematical variables <p>Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets below).</p>	<p>Please consult the <i>Genesys Migration Guide</i> for more information.</p> <p>Do <i>not</i> use this value for this option.</p> <p>A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession.</p> <p>The formula, $x + 1 = 7$ where x stands for . . .</p>
Monospace font (Looks like teletype or typewriter text)	<p>All programming identifiers and GUI elements. This convention includes:</p> <ul style="list-style-type: none"> The <i>names</i> of directories, 	<p>Select the Show variables on screen check box.</p> <p>In the Operand text box, enter your formula.</p>

	<p>files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages.</p> <ul style="list-style-type: none"> • The values of options. • Logical arguments and command syntax. • Code samples. <p>Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.</p>	<p>Click OK to exit the Properties dialog box.</p> <p>T-Server distributes the error messages in EventError events.</p> <p>If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls.</p> <p>Enter exit on the command line.</p>
<p>Angle brackets (<>)</p>	<p>A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise.</p> <p>Note: In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.</p>	<pre>smcp_server -host <confighost></pre>

1 Prerequisites

Server prerequisites

SQL Server prerequisites

To upgrade the database portion of the application you will need:

- Windows Server 2003 / 2008 / 2008R2 32 or 64bit.
- Microsoft SQL Server 2005 / 2008 (Standard or Enterprise required for DNA functionality).
- DNA requires SQL Server Agent, Analysis Services and Integration Services to be available on the server.
- Administrator access to the SQL Server.
- SQL Server Collation settings:
 - SQL Server language: English (United States)
 - Database level collation: Latin1_General_CI_AS
- An existing, working, version 8.1.125 database.

Web server prerequisites

- Windows Server 2003 / 2008 / 2008R2 32 or 64bit.
- Microsoft .NET Framework 4.0
- Microsoft Windows Identity Framework (KB974405) for the appropriate Windows version/architecture.
 - The download required is available from:
<http://www.microsoft.com/en-gb/download/details.aspx?id=17331>

- Ensure you download the appropriate version for your web server.
- In IIS6, Ensure that .NET 4.0 is registered correctly. Run:
"C:\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe -I" from a command prompt if unsure.
- The following additional runtimes must also be installed to support the new Crystal Reports functionality in Skills Assessor:
 - Java Runtime Environment, available from:
<http://www.java.com/en/download/index.jsp>
 - Crystal Reports runtime, available from:
<http://scn.sap.com/docs/DOC-7824> (download and install the latest 32 bit Support Pack .msi)
 - **Note:** The new 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).
- Internet Information Services
 - IIS must be configured to allow ASP.NET v4.0.30319. For more information, see <http://goo.gl/Iq6Nb> and <http://goo.gl/c0fWb>.
 - For x64 based operating systems the application pool used for the web application needs to allow 32 bit processes. For IIS6, more information can be found at <http://goo.gl/XTQwj>.
 - To support the import of data from .XLSX documents, Skills Assessor requires that two Microsoft redistributables are installed on the web server. These can be downloaded from:
 - <http://www.microsoft.com/en-us/download/details.aspx?id=13255>
 - <http://www.microsoft.com/en-us/download/confirmation.aspx?id=23734>
 - Administrator access to the server
 - An existing, working, version 8.1.125 application.

Required Files

Your IP folder should contain the following files and folders:

- DB Installation Files (This contains the file required to upgrade the database)
- NotificationService

- SkillsAssessor (This contains the files and folders required to upgrade the web application)
- OptimizerMenuWS
- ReportingWS
- Services.Correlation
- Services.DnaCube
- Services.DnaData
- Services.LearningItemAssignment
- Services.LmsInterface
- Installation Guides

The release folder also includes the following installation MSI files:

- AssessmentEmailMessagingServiceSetup_vX.Y.ZZZZ.msi
- AutoRankCalculationApplication_vX.Y.ZZZZ.msi
- DNAImportSetup_vX.Y.ZZZZ.msi
- LearningItemAutoAssignSetup_vX.Y.ZZZZ.msi
- NotificationsUISetup_vX.Y.ZZZZ.msi

Your release package may also include:

PrePostCourseAssessmentHelperSetup_vX.Y.ZZZZ.msi

The product will only be available for use once you have specified a valid software license. Please ensure you have this available before installing Skills Assessor.

2 Database Upgrade

Preparation

- Copy the contents of the DB Installation Files folder to the SQL Server
- Take a backup of your existing SkillsAssessor database.

Update the Skills Assessor Database

1. Open Microsoft SQL Server Management Studio and login as an admin user.
2. Click New Query
3. Drag the SkillsAssessor 8.1.127 - Upgrade from 8.1.125.sql database script file from your copy of the DB Installation Files folder into the new query area of the SQL Server Management Studio.
4. Enable SQLCMD mode by clicking the script menu item and ensuring that the SQLCMD Mode item is active.
5. Ensure that the highlighted DatabaseName variable within the SQL script is set to the name of your existing version 8.1.125 database, e.g. `:setvar DatabaseName "SkillsAssessor"`
6. Ensure that the DefaultDataPath and DefaultLogPath variables match your SQL Server settings.
7. Execute the script to update the database.

Create the Reporting Database

Follow the steps below to create the Reporting Database.

1. Open and login to Microsoft SQL Server Management Studio

2. Drag the ReportingDB SQL Script from the stored folder into SQL Server Management Studio. This will cause the reporting database creation script to be displayed in the new query pane.
3. Click the Query menu item and select SQLCMD Mode so that it is enabled.
4. Near the top of the database creation script are 3 variable settings: DatabaseName, DefaultDataPath and DefaultLogPath. Set the DefaultDataPath and DefaultLogPath to the same settings used for the Skills Assessor database. The DatabaseName variable should be left at its default value.
5. Execute the script.
6. Either create a new database user account with db_owner permissions on the reporting database or grant db_owner permissions on the reporting database to the account used for the Skills Assessor database.

Update the DNA Database

Follow the steps below to update your DNA database. These steps only apply if your 8.1.125 application included DNA support.

1. Open Microsoft SQL Server Management Studio and login as an admin user.
2. Drag the SkillsDNA 8.1.127 - Upgrade from 8.1.125.sql database script file from your copy of the DB Installation Files folder into SQL Server Management Studio.
3. Enable SQLCMD mode by clicking the script menu item and enabling SQLCMD Mode.
4. Ensure that the highlighted DatabaseName variable within the SQL script is set to the name of your existing v8.1.125 DNA database, e.g. :setvar DatabaseName "DNA"
5. Execute the script to update the database.

Import the Integration Services package

Note: This step is only required if you require DNA as part of your application and you have not already configured an Integration Services package as part of the previous version.

To implement DNA, you must import the Integration Services package to allow the web application to process of the DNA Cube.

1. Copy the RefreshDNACube.dtsx file from the DB Installation files folder
2. Using SQL Server Management Studio, connect to the Integration Services server and navigate to Stored Packages \ MSDB.

3. Right-click on the MSDB node and choose the New Folder option from the context menu. Give the folder a name (for example, GenesysSA).
4. Right-click the folder you just created and choose Import Package. The Import Package dialog will appear.
5. In the Package location drop-down list, choose File System.
6. Click on the [. .] button at the end of the Package path box, and browse to your copy of the DB Installation Files folder.
7. Select the RefreshDNACube.dtsx file then click Open.
8. Click on the [. .] button at the end of the Protection level box, and select Rely on server storage and roles for access control. Then click OK.
9. Click OK to complete the import of the package.
10. For illustrative purposes in this document it is assumed that the MSDB subfolder is called GenesysIS and that the package name was left as RefreshDNACube.

3 Web Application Upgrade

Preparation

Backup the existing web application and set file permissions

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

Upgrade the application files

1. Locate the current application folder on the web server.
2. Delete the content of the SkillsAssessor folder.
3. Copy the entire contents of the SkillsAssessor folder in the install package.

Crystal Reports Folder

Create a folder to hold uploaded Crystal Reports (e.g. C:\websitedata\crystalreports). Right click on this folder and click Properties. Select the Security tab. Add NETWORK SERVICE as a user with permissions on the folder and ensure it has read and write access.

Web Service Installation

Create a folder to hold the Skills Assessor web services, e.g. "C:\Websites\Services\".

Copy the following folders from the release package into the `services` folder:

- `Services.Correlation`
- `Services.DnaCube`
- `Services.DnaData`
- `Services.LearningItemAssignment`
- `Services.LmsInterface`
- `OptimizerMenuWS`
- `ReportingWS`

If you intend to configure Skills Assessor with Active Directory authentication via the Secure Token Service, you should also copy the `NotificationService` folder into the `Services` folder.

Open IIS Manager.

Create a virtual directory to hold the web services alongside Skills Assessor, i.e., not underneath Skills Assessor, in the sites/directories hierarchy. The target folder of this virtual directory should be set to the `Services` folder you created previously. Leave the permissions on the folder at their default values. After creating the services virtual directory, a group of folders will appear underneath it in IIS manager. The folders should include:

- `OptimizerMenuWS`
- `ReportingWS`
- `Services.Correlation`
- `Services.DnaCube`
- `Services.DnaData`
- `Services.LearningItemAssignment`
- `Services.LmsInterface`
- `NotificationService` may also appear if you have copied it into the services folder

IIS Setup

Follow the steps below to convert the folders located in the `Services` virtual directory in IIS to applications.

For each folder in the `Services` virtual directory:

- Right click on the folder and click `Properties`.
- In the `Directory` tab, click `Create`.
- Set the service application pool to the one used by `Skills Assessor`.
- Ensure that the service is set to use `ASP .NET version 4.0.30319`.
- Set execute permissions to `scripts only`.
- Click `OK`.

Configuring service logging

The correlation, DNA Data, LearningItemAssignment and LMSInterface web services include configurable elements for setting the location and verbosity of log files. To set the directory used for logs, set the `LogPath` value to the directory of your choice, e.g. `'C:\Logs'`. The verbosity setting supports four options: `'Minimal'`, `'Terse'`, `'Verbose'` and `'Diagnostic'` which range from providing minimal feedback of service activity to full detail.

Note: Take care not to leave the service logging in `'verbose'` mode for extended periods as this may result in the creation of very large log files.

Service configuration: ReportingWS

Open the `Skills Assessor Web.config` document in Microsoft Notepad or similar text editor. Locate the `appSettings/ReportsFolder` key and set the value to the location of the folder you created to hold uploaded reports, e.g.:

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

Browse to the `Reporting Service` folder and locate the `Web.config` document. Open this document in Microsoft Notepad or similar text editor. Locate the `connectionStrings` element and set the `connectionString` variables to the details of your reporting database and the user with `db_owner` permissions on this database, e.g.:

```
<add name="ReportingWS.My.MySettings.ReportingDB"
```

```
connectionString="Data
Source=***; Database=ReportingDB; UID=***; PWD=***; Trusted_Connec
tion=False" />
```

Service configuration: OptimizerMenuWS

Browse to the MenuWS folder on the web server. Open the contained `Web.config` document using a text editor, e.g. Microsoft Notepad. Edit the `<connectionStrings>` parameters to reflect the Skills Assessor database settings used in your environment:

```
connectionString="Data
Source=yourserver; Database=databasename; UID=DBUserID; PWD=DBUse
rPassword; Trusted_Connection=False" />
```

Save and close the file.

Service configuration: Services.DNACube

The configuration of this web service is required only if you are upgrading an instance of Skills Assessor with DNA.

Browse to the `Services.DnaCube` folder on the web server. Open the contained `web.config` file using a text editor, e.g. Microsoft Notepad. Locate the element:

```
<add name="Cube" connectionString="Data Source=***; Initial
Catalog=DNACube_X" providerName="System.Data.SqlClient" />
```

Edit the data source variable to suit the location of the Analysis Services that holds your DNA Cube database. Modify the Initial Catalog element to match the DNA database in the Analysis Services; this is normally 'DNACube_' followed by your tenant ID, e.g. 'DNACube_2'. Save and close the file.

Service configuration: Services.DnaData

Browse to the `DnaData` folder on the web server. Open the contained `web.config` document using a text editor, e.g. Microsoft Notepad. Locate the element:

```
<add name="DNA" connectionString="Data
```

```
Source=***; Database=***; UID=***; PWD=***; Trusted_Connection=False"
  providerName="System.Data.SqlClient" />
```

Edit the variables (identified by asterisks) to suit your environment. The Database element should be set to your DNA Database in the SQL Server database engine (rather than the DNA database in the Analysis Services). Locate the element containing the URL to the DNA Cube service:

```
<endpoint address=http://\*\*\*/\*\*\*/CubeService.svc
```

Edit the endpoint address to fit the URL of the Cube service in your environment. Locate the LogPath element. Edit the value to the folder you wish to use to store service logs and, optionally, edit the Verbosity value to your chosen logging level:

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

Save and close the file.

Service configuration: LearningItemAssignment

Browse to the LearningItemAssignment folder on the web server. Open the contained Web.config document using a text editor, e.g. Microsoft Notepad.

Locate the element:

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

Edit the endpoint to fit the URL of the DNAData service in your environment. Locate the element:

```
<endpoint address=http://\*\*\*/\*\*\*/LmsInterface.svc
```

Edit the endpoint to fit the URL of the LMSInterface service in your environment.

Locate the element:

```
<endpoint address=http://\*\*\*/\*\*\*/WS/AssessmentService.svc
```

Edit the endpoint to fit the URL of the Skills Assessor assessment service.

Locate the element:

```
<endpoint address=http://***/***/WS/Users.aspx
```

Edit the endpoint to fit the URL of the Skills Assessor users service.

Locate the LogPath element. Edit the value to the folder you wish to use to store service logs and, optionally, edit the Verbosity value to your chosen logging level:

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

Save and close the file.

Service configuration: LMSInterface

If you wish to integrate Skills Assessor with the JZero JLMS, open the web.config file in the LmsInterface service. Locate the element:

```
<endpoint
address=http://\*\*\*/\*\*\*/jzeroskillsassess/assessment.asmx
```

Edit the endpoint URL to match the Jzero JLMS assessment.asmx service. Locate the LogPath element. Edit the value to the folder you wish to use to store service logs and, optionally, edit the Verbosity value to your chosen logging level:

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

Save and close the file.

Configuring the Skills Assessor Web.config file

Browse to the SkillsAssessor folder on the web server. Open the contained Web.config document using a text editor, e.g. Microsoft Notepad. Locate the element:

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

Edit the endpoint to fit the URL of the Reporting service.

Locate the element:

```
<endpoint
address=http://\*\*\*/\*\*\*/SkillsAssessor/MenuService.svc
```

Edit the endpoint address to fit the URL of the OptimizerMenuService.svc in your environment.

Locate the element:

```
<endpoint address=http://localhost/\*\*\*/\*\*\*/LmsInterface.svc
```

Edit the endpoint address to fit the URL of the LmsInterface.svc in your environment.

Locate the element:

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

Edit the endpoint address to fit the URL of the OptimizerMenuService.svc in your environment.

Locate the element:

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

Edit the endpoint address to fit the URL of the LearningItemAssignmentService.svc in your environment.

Edit the ReportsPlannerDBConnectionString key with the database connection string details for the Training Manager database (if required to read data from the Training Manager database when using Crystal Reports):

```
<add key="ReportsPlannerDBConnectionString"  
value="Server=.; Database=***; UID=***; PWD=***; Trusted_Connection=False" />
```

Locate the LogPath element. Edit the value to the folder you wish to use to store service logs and, optionally, edit the Verbosity value to your chosen logging level:

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

Save and close the file.

Accessing the web service URLs from a browser on the web server should result in the display of a page entitled with the service's name.

Skills Assessor Database Connection Settings

Edit the `WebSettings.config` file to suit the database connection settings used for the previous product version:

```
<DBConnection>Server=***; Database=SkillsAssessor; UID=***; PWD=***; Trusted_Connection=False</DBConnection>
```

Setting the DNA service URL in Skills Assessor

Follow the below steps to configure the URL used by Skills Assessor to access the DNA Data service:

1. Log in to Skills Assessor as a tenant admin user.
2. Click System > System Settings.
3. Click on the General Settings tab.
4. Add the URL for the DNA Data Service in the DNA Service URL (`http://***/***/Services.DnaData/DnaService.svc`) field and click Save Changes

If you wish to use forms-based user authentication, your upgrade is now complete.

If you wish to convert Skills Assessor to use Active Directory authentication rather than the default form-based login system, please consult the **Installing and configuring AD authentication via the SLS Secure Token Service** document.

The remaining sections of this document provide steps for installing the new optional features available in Skills Assessor 8.1.127.

4

Configuring Optional Features

Skills Assessor 8.1.127 also includes several new optional applications/services that provide the ability to:

- Automatically import DNA KPI data via the **DNA Import Service** (installer: `DNAImportSetup_vX.Y.ZZZZ.msi`)
- Automatically assign learning items to users via the **Learning Item Auto-Assignment** application (installer: `LearningItemAutoAssignSetup_vX.Y.ZZZZ.msi`)
- Automatically calculate the correlation between KPIs and learning items via the **Learning Item Auto-Ranking** application (installer: `AutoRankCalculationApplication_vX.Y.ZZZZ.msi`)
- Allow administrators to create JZero LMS learning items and assign them to users via the JLMS Learning Item Integration functionality.

The following sections provide instructions for installing and configuring these optional components.

Enabling JZero LMS Learning Item Integration

Pre-requisites: DNA, a JZero LMS instance accessible from the Skills Assessor web server.

The JLMS learning item integration feature allows Skills Assessor administrators to assign Skills Assessor assessments to JZero LMS users. These assessments can then be viewed and launched from the JLMS. Follow the steps below to enable JLMS Learning Item integration features.

Open the `web.config` document from the `Services.LmsInterface` folder on the web server.

Locate and edit the following element to match the location of the JLMS `assessment.asmx` web service in your environment:

```
<endpoint  
address="http://***/***/jzeroskillsassess/assessment.asmx"
```

Login to the SQL Server Management Studio on the database server.
Open the `dbo.Providings` table in the Skills Assessor database.
Add an additional row to the table with the following values:
TenantID: The ID of the tenant which should have JLMS features enabled. This can be found by checking the content of the `dbo.Tenants` table.
SystemID: This field should be set to '201'.
SystemName: This field should be set to 'JLMS'.
SystemTitle: This field should be set to 'JLMS'.
SystemVersion: This field should be set to '8.1.127'.
The remaining fields can be left empty.
Apply the table changes.

Login to the tenant you wish to enable JLMS features for as a tenant administrator.
Click on the `System Settings` link.
In the `User Fields` tab create a new user field to hold users' JLMS user names.

Login to the tenant administration area via localhost.
From the `Manage Tenants` table, click the `Edit` link for the tenant which should have JLMS features enabled.
Click `Next` in the `Tenant Details` page.
Click `Next` in the `Licence Details` page.

In the `JLMS Settings` page:
Tick the `JLMS Enabled` checkbox.
Enter the URL of the JLMS `assessment.asmx` web service URL into the `JLMS URL` field.
Set the `Manager zone matching field` to the user field you created previously to store users' JLMS usernames.

The remaining checkboxes in the JLMS Settings page affect the layout of elements in the JLMS Manager and User Zones and the display of certain data elements.

Manager zone hide remaining: Ticking this option causes the number of ‘remaining’ and ‘complete’ assessments to be displayed in the manager zone.

Manager zone hide CORA: Ticking this option disables the display of the core, optional, resource library and all activity checkbox set under the all activities dropdown.

User Manager zone layout: Leaving this option un-ticked causes an additional ‘Average Score’ graph to be displayed on the right side of the User/Manager zone pages. Ticking the checkbox removes the graph.

Is pass/fail shown: This option toggles the display of results for completed Skills Assessor assessments.

Is pass mark shown: Toggles the display of the pass mark per assessment.

Click **Next** once you've finished making changes in this page.

Click **Finish** in the Setup Admin User page.

Login to the tenant you have configured to support JLMS.

Go to the **Users & Hierarchy** page. For each user you wish to have access to the JLMS Learning Item functionality:

1. Right click on them in the hierarchy
2. Click **Edit user details**
3. Select the user on the left side of the page.
4. Set a value for the JLMS login user field you created earlier. The username entered here must match a valid JLMS username in your environment.

Skills Assessor is now configured to support JLMS learning items. Any users with access to the **Learning Items** page will now be able to create JLMS course learning items, associate them with DNA components and assign them to users.

Learning Item Auto-Assignment Application

Pre-requisites: DNA

The Learning Item Auto-Assignment application can be used to automatically assign recommended learning items to users based on their DNA scores. This removes the need for administrators to manually assign learning items that fall into users’ recommended ranges. Follow the steps below to install the application.

Double click the `LearningItemAutoAssignSetup_v.X.Y.ZZZZ.msi` in the release package.

Click **Next** on the Welcome to the Learning Item Auto-Assignment Setup Wizard screen.

Either leave the default installation location set or click the **Change** button to select an alternative location.

In the Web Service Connections page:

Enter the URL for the Learning Item Assignment service in the first text box excluding the Service name and the last forward slash. For example, if your learning item assignment service is located at:

<http://localhost/Services/Services.LearningItemAssignment/LearningItemAssignmentService.svc>

you should enter the following into the first text box:

<http://localhost/Services/Services.LearningItemAssignment>

Enter the equivalent value for the DNA Data Service into the second text box. Enter the Skills Assessor tenant ID into the third text box. This can be found by opening the Skills Assessor database and checking the ID of the tenant you wish to configure in the `dbo.Tenants` table.

The log file path text box sets the location of the application's log files. The log file path (4th text box) can either be left at its default value or an alternative folder can be selected.

Click the **Next** button.

Click the **Install** button.

Click the **Finish** button once the wizard has completed installing the application.

Once the application is installed it will be possible to start the application manually by browsing to the install location and double-clicking the `SilverLining.PerformanceDNA.Apps.LearningItemAutoAssign.exe` file. Alternatively, a scheduled task can be created on the server hosting application to run the task at a pre-defined schedule. Since the application may take some time to finish (depending on the number of users, KPIs and learning items) it is recommended that scheduled tasks running the application are set to run once per day.

Auto Rank Calculation Application

Learning items can be associated with DNA components. A priority can be assigned to the DNA component-learning item association. This priority can either be defined by admins manually or automatically by the auto rank calculation application.

The auto rank calculation application correlates learning item results (e.g. assessments) with DNA component scores. Items are ranked highly if there is a positive correlation between a learning item's scores and a subsequent improvement in the associated DNA component score. Items that have a weak or negative correlation are left un-ranked by the application.

Follow the steps below to install the application.

1. Double click the `AutoRankCalculationApplication_v.X.Y.ZZZZ.msi` in the release package.
2. Click **Next** on the **Welcome to the Learning Item Auto-Ranking Setup Wizard** screen.
3. Either leave the default installation location set or click the **Change** button to select an alternative location.
4. In the **Web Service Connections** screen enter the URL for the correlation, DNA data service and Skills Assessor (labeled as 'Optimizer'). Be sure to exclude the service name and last forward slash from the entered URLs, e.g.:
5. **Correlation service:** `http://localhost/Services/Services.Correlation`
6. **DNA data service:** `http://localhost/Services/Services.DnaData`
7. **Skills Assessor:** `http://localhost/skillsassessor`
8. Click **Install** on the **Ready to install Learning Item Auto-Ranking** screen.

Once the application is installed it will be possible to start the application manually by browsing to the install location and double-clicking the `SilverLining.PerformanceDNA.Apps.PerformAutoRankCalculation.exe` file. Alternatively, a scheduled task can be created on the server hosting application to run the task at a pre-defined schedule. Since the application may take some time to finish (depending on the number of users, KPIs and learning items) it is recommended that scheduled tasks running the application are set to run once per day.

DNA Import Setup

Pre-requisites: DNA installed and configured (users, DNA components and blocks should be present prior to setting up the DNA Import Service)

Notes:

- This application is currently not compatible with Skills Assessor instances that use Active Directory (STS) authentication.
- The service must have network access to the Skills Assessor web server.

The DNA Import Service allows for the automated import of KPI spreadsheets via a user-defined import folder. The service automatically processes any valid KPI spreadsheet files that are placed in the import folder. Once the files are processed they are moved from the import folder to a user-defined archive folder.

Installing the DNA Import Service

Double click the `DNAImportSetup_v.X.Y.ZZZZ.msi` in the release package. Click **Next** on the **Welcome to the DNA Import Service Setup Wizard** screen.

On the **Destination Folder** screen either leave the installation location at its default value or click the **Change** button to select an alternative location.

Click **Next**.

In the **Service account** screen you can specify whether to use an existing service account or a custom account.

Note: If you set the service to run under a custom user account then this account must have permissions to log on as a service.

Click **Install** on the **Ready to install DNA Import Service** screen.

Click **Finish** once the installation wizard has completed installing the service.

Configuring the DNA Import Service

Browse to the DNA Import Service installation location.

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

Locate the following element:

```
<setting name="DNAImportService_DNAWebServices_DNAWebServices"
         serializeAs="String">
  <value>http://***/DNA/DNAWebServices.asmx</value>
</setting>
```

Edit the value to match the location of the:

`skillsassessor/WS/ImportKpiData.asmx` web service to suit your environment.

Save the file.

Login to Skills Assessor as a tenant administrator.

Click the **Import Templates** link.

Click the **New import template** button.

Set a name for the new template in the **Template Name** field.

Set the **Import Template Type** dropdown box to **DNA**.

In the **Source Description** field enter the column label for the Skills Assessor username as it appears in your import spreadsheets. Set the **Source ID** field to the number of the column in the spreadsheet. This value is zero-based so the first column in the spreadsheet has a Source ID of '0'.

In the 'Maps To' dropdown select the user field that is used to authenticate users, e.g. Login ID.

In the **Date Field Description** enter the label of the column used to store the dates of the contained KPI values.

In **Date Field ID** enter the number of the column in the spreadsheet that holds the dates of the contained KPI values. As before, this value is zero-based.

Click the **Save** button.

An additional box will appear under the form along with an **Add mapping** button.

For each column in the import spreadsheet that holds users' KPI values:

- Click the **Add mapping** button to create an association between a spreadsheet column and a KPI.
- In the **Source Description** field enter the label of the column that holds KPI value records.
- In the **Source ID** field enter the number of the column (zero-based).
- In the destination field dropdown box select the KPI which is associated with this column.
- Click **Save**.

Each mapping can be edited and removed using the associated buttons in the mappings table.

Template ID: 2
 Template Name: Key KPIs
 Import Template Type: DNA
 Unique Field Mapping: Login ID
 Source Description: Login ID
 Source ID: 1
 Maps To: Login ID
 Date Field Mapping: date
 Date Field Description: date
 Date Field ID: 0

Source Description	Source ID	Destination Field
Feedback	4	feedback (KPIs)

Add mapping Details updated

Figure 1: Creating an Import Template

Make a note of the Template ID, as displayed at the top of this page, as it is required to configure the DNA Import Service.

Open the config.xml file with Notepad or similar text editor.

Locate the following element:

```
<IMPORTS WebServiceURL="http://***/WS/Import/DNA.asmx"
ArchiveFilePath="**">
```

Edit the value of the WebServiceURL element to match the location of the skillsassessor/WS/ImportKpiData.asmx service.

Set the value of the ArchiveFilePath element to the location of the archive folder, e.g. "C:\archive\". The service will move files from the import folder to the archive folder once they've been processed.

Locate the following element:

```
<IMPORTDETAILS Folder="**" TenantID="**"
MappingTemplateID="**" UserID="**" AuthUserName="**"
AuthUserPassword="**" />
```

Set the Folder value to the folder you wish to use as the import folder, e.g. "C:\DNAImport\".

Set the `TenantID` to the ID of the tenant you are configuring the service for. This can be found by opening the `dbo.Tenants` table in the Skills Assessor database.

Set the value of the `MappingTemplateID` element to the ID of the mapping template you created earlier (as displayed at the top of the edit mapping template page).

The `UserID` element may be left at its default value.

Set the `AuthUserName` to the username of the Skills Assessor user for whom the service is being configured.

Set the `AuthUserPassword` to the password of the Skills Assessor user for whom the service is being configured.

Click Start -> All Programs -> Administrative Tools -> Services.

Locate the DNA Import Service in the Services (Local) list.

Right click on the service and click the Restart option. Changes made to the service's `DNAImportService.exe.config` or `config.xml` files will not be applied until the service is restarted.

Ensure that the service is set to Automatic in the Startup Type column.

If the service is not set to start automatically right click on the service and click the Properties button.

Set the Startup type dropdown to Automatic.

Click the OK button.

Using Windows Explorer, browse to the folder that contains the import folder you've created.

Right click on the folder and click Properties.

Click the Security tab.

Click Add.

In the Enter the object names to select field enter the name of the service or domain user account that is used to run the DNA Import Service.

Click the Check Names button.

Click the OK button.

Tick the Full Control · Allow checkbox for the added service/domain account.

Click the Apply button.

Click the OK button.

Repeat the above process for the archive folder.

The DNA Import Service is now configured. Copying files into the import folder will cause the service to import the KPI values into the SkillsAssessor database and then move the file into the archive folder. The file will be renamed prior to being moved to the archive folder to prevent naming

conflicts. The service produces a log of its activities which is accessible from the service's install location.