



Training Manager 8.1.1

Installation Guide

The information contained herein is proprietary and confidential and cannot be disclosed or duplicated without the prior written consent of Genesys Telecommunications Laboratories, Inc.

Copyright © 2009-2012 Genesys Telecommunications Laboratories, Inc. All rights reserved.

About Genesys

Genesys is the world's leading provider of customer service and contact center software - with more than 4,000 customers in 80 countries. Drawing on its more than 20 years of customer service innovation and experience, Genesys is uniquely positioned to help companies bring their people, insights and customer channels together to effectively drive today's customer conversation. Genesys software directs more than 100 million interactions every day, maximizing the value of customer engagement and differentiating the experience by driving personalization and multi-channel customer service - and extending customer service across the enterprise to optimize processes and the performance of customer-facing employees. Go to www.genesyslab.com for more information.

Each product has its own documentation for online viewing at the Genesys Technical Support website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

Notice

Although reasonable effort is made to ensure that the information in this document is complete and accurate at the time of release, Genesys Telecommunications Laboratories, Inc. cannot assume responsibility for any existing errors. Changes and/or corrections to the information contained in this document may be incorporated in future versions.

Your Responsibility for Your System's Security

You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.

Trademarks

Genesys and the Genesys logo are registered trademarks of Genesys Telecommunications Laboratories, Inc. All other company names and logos may be trademarks or registered trademarks of their respective holders. © 2012 Genesys Telecommunications Laboratories, Inc. All rights reserved.

The Crystal monospace font is used by permission of Software Renovation Corporation, www.SoftwareRenovation.com.

Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

Ordering and Licensing Information

Complete information on ordering and licensing Genesys products can be found in the [Genesys 7 Licensing Guide](#).

Released by: **Genesys Telecommunications Laboratories, Inc.** www.genesyslab.com

Document Version: 81_trainingmgr_install_08-2012_v8.1.101.00



Table of Contents

Preface	Preface5
	About Genesys Training Manager5
	Intended Audience6
	Making Comments on This Document.....6
	Contacting Genesys Technical Support.....6
	Related Documentation Resources6
	Document Conventions.....7
	Document Version Number.....7
	Screen Captures Used in This Document7
	Type Styles.....7
Chapter 1	Server Configuration9
	Installation Files.....9
	Database Server Software Prerequisites9
	Web Server Software Prerequisites9
	Required Files10
	Server Configuration10
	Windows Server 2003 / IIS6.....10
	Windows Server 2008 / IIS713
	Database Installation15
	SQL Server.....15
	File Installation16
	Internet Information Services16
	Windows Server 2003 / IIS616
	Windows Server 2008 / IIS719
	Configuration Files21
	SkillsManagerWS21
	SkillsPortal.....22
	Server Diagnostic Checks23
	Performing Diagnostics.....23

Chapter 2	Client Installation	27
	Installation Files.....	27
	Client Software Prerequisites.....	27
	Required Files	27
	Client Installation Procedure	28
	Launching the Client	29
Appendix A	Server Configuration Files.....	31
	SkillsManagerWS	31
	WebSettings.config Sections	31
	SkillsPortal	32
	WebSettings.config Sections	32



Preface

Welcome to the *Training Manager 8.1.1 Installation Guide*. This document has been designed to provide instructions for an administrator to install the Training Manager application.

This document is valid only for the 8.1.1 release of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Technical Support website.

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on [page 9](#).

About Genesys Training Manager

Genesys Training Manager 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, and the availability of agents, trainer and classrooms.

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

Intended Audience

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

Making Comments on This Document

If you especially like or dislike anything about this document, feel free to e-mail your comments to Techpubs.webadmin@genesyslab.com.

You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document. Please limit your comments to the scope of this document only and to the way in which the information is presented. Contact your Genesys Account Representative or Genesys Technical Support if you have suggestions about the product itself.

When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

Contacting Genesys Technical Support

If you have purchased support directly from Genesys, see the [Contact Information](#) on the Tech Support website. Before contacting technical support, refer to the [Genesys Technical Support Guide](#) for complete contact information and procedures.

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

- The *Framework 8.0 Configuration Manager Help*, which will help when using Configuration Manager.

Genesys

Consult these additional resources as necessary:

- The *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library CD and which provides a comprehensive list of the Genesys and CTI terminology and acronyms used in this document.
- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at <http://genesyslab.com/support>.

Genesys product documentation is available on the:

- Genesys Technical Support website at <http://genesyslab.com/support>.

Document Conventions

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

Document Version Number

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

42gp_icg_aspect-wfm_08-2010_v4.2.001.01

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

Screen Captures Used in This Document

Screen captures from the Configuration Manager graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the GUI; the error would not be corrected in any accompanying text.

Type Styles

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

Type Styles

Type Style	Used For	Examples
Italic	<ul style="list-style-type: none">• Document titles• Emphasis• Definitions of (or first references to) unfamiliar terms• Mathematical variables	<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><i>A customary and usual practice</i></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).	is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x stands for . . .
Monospace font (Looks like teletype or typewriter text)	<p>All programming identifiers and GUI elements. This convention includes:</p> <ul style="list-style-type: none"> • The <i>names</i> of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. <p>Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.</p>	<p>Select the Show variables on screen check box.</p> <p>In the Operand text box, enter your formula.</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>
Angle brackets (< >)	<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>



Chapter

1 Server Configuration

Installation Files

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

Database Server Software Prerequisites

- Windows Server 2003 (or higher)
- SQL Server database server (2005 or higher)
- Service Pack 4 for SQL Server 2005 (recommended)

Web Server Software Prerequisites

- Windows Server 2003 (or higher)
- .NET Framework 2.0 installed. This should already be installed by default on Windows Server 2008 and Windows Server 2008 R2, but may need to be installed separately on Windows Server 2003.
- .NET Framework 3.5 SP1 installed. This should already be installed by default on Windows Server 2008 R2, but may need to be installed separately on the original release of Windows Server 2008.

Required Files

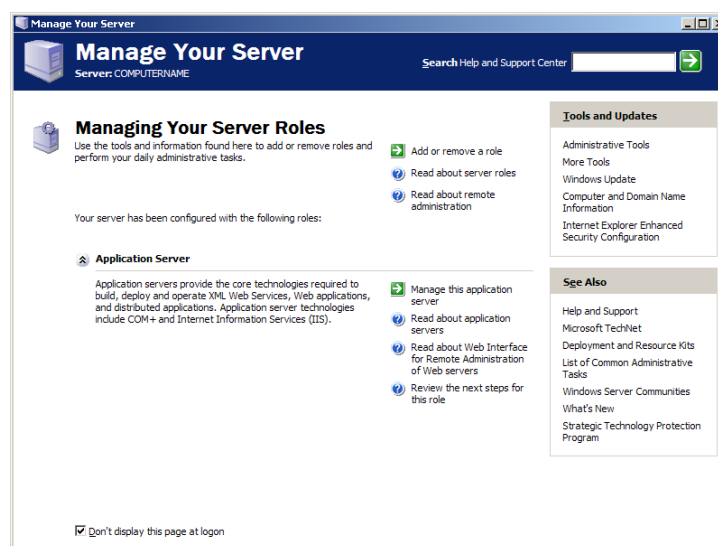
- Database installation script file (SKM.sql). This is located in the Database Scripts folder of the package.
- Internet Information Services (IIS) files (SkillsManagerWS and SkillsPortal folders). These are located at the root folder of the installation package.

Server Configuration

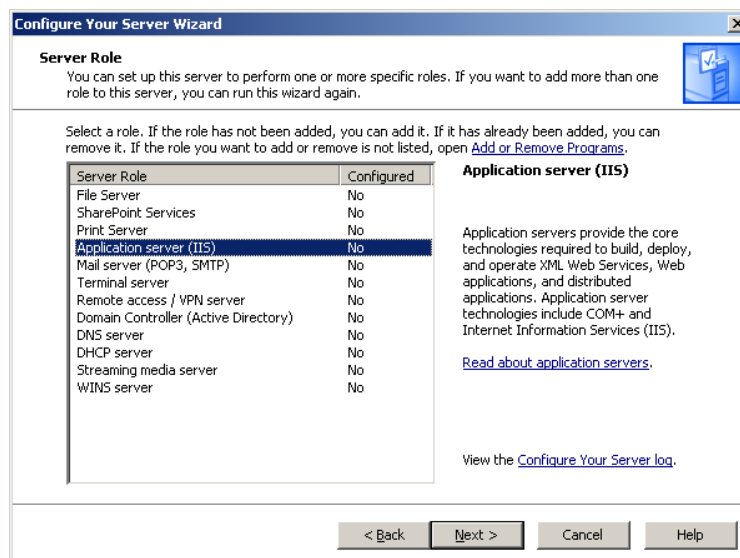
Windows Server 2003 / IIS6

Make sure that your Windows Server has IIS installed and is configured to run ASP.NET.

In Windows Server 2003 (IIS 6), launch the Manage Your Server application (shown in the following screenshot), click Add or remove a role, and then click Next.



In the Configure Your Server Wizard (shown in the following screenshot), next to Application server (IIS), Yes needs to appear in the Configured column. If it does not, select the row, and then click Next.

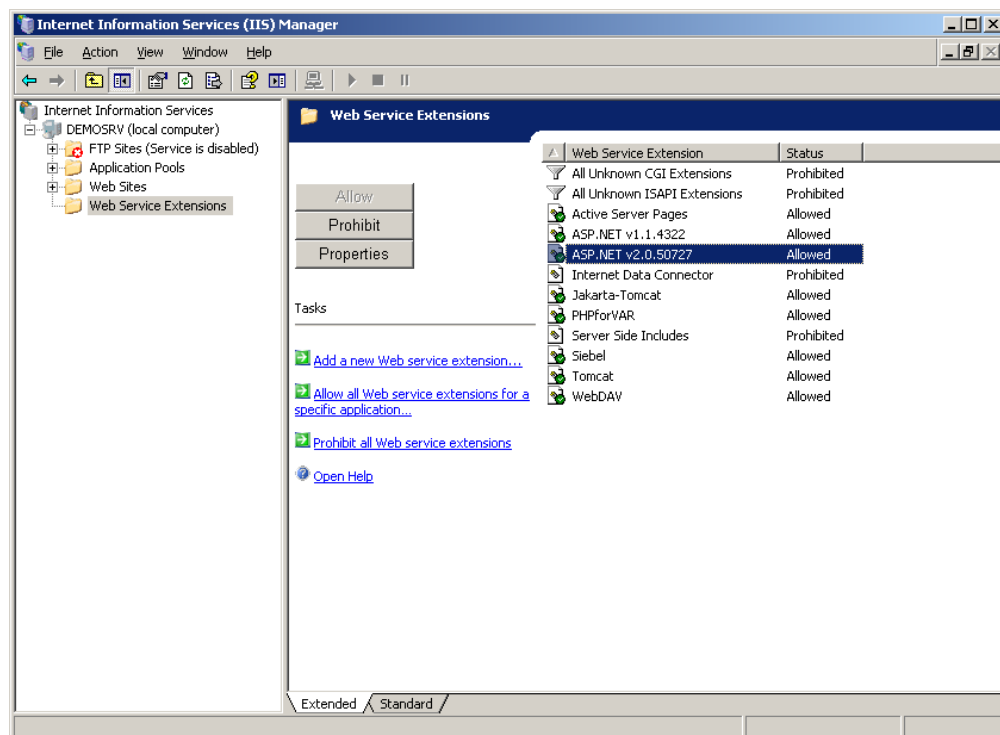


Click **Next** again, and you will see a **Summary of Selections** page to confirm that you want to install IIS. Click **Next** again to actually perform the installation. You may need your Windows Server 2003 CD at this stage.

Click **Finish**, and Internet Information Services (IIS) Manager should be available from **All Programs** on the Windows Start menu.

If ASP.NET is already installed on your server, verify that it has been enabled. To do this, launch Internet Information Services (IIS) Manager, and then click **Web Service Extensions**.

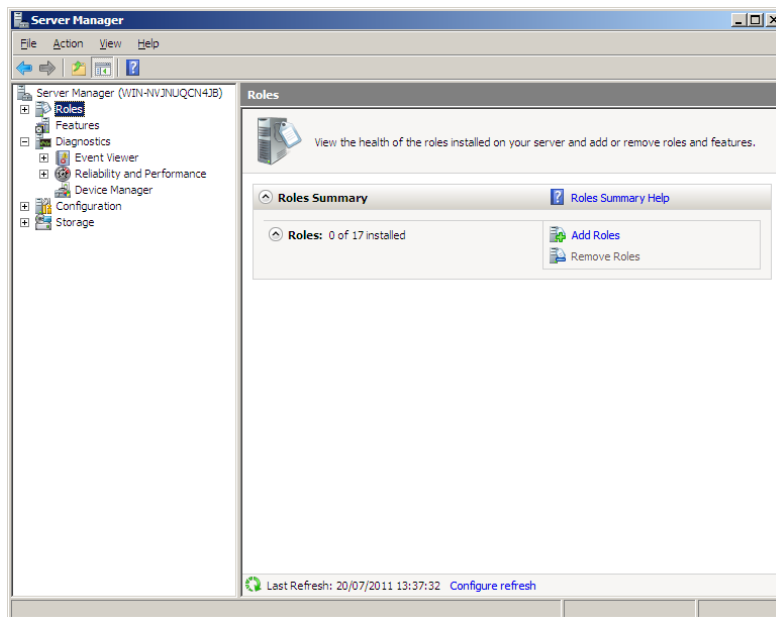
If ASP.NET v2.0.50727 is listed in the right pane, the status must be set to **Allowed**.



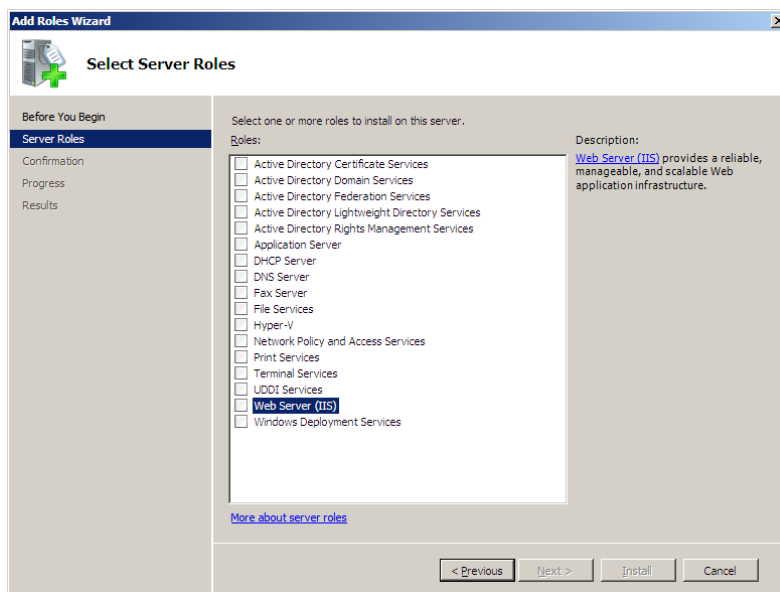
Windows Server 2008 / IIS

Make sure that your Windows Server has IIS installed and is configured to run ASP.NET.

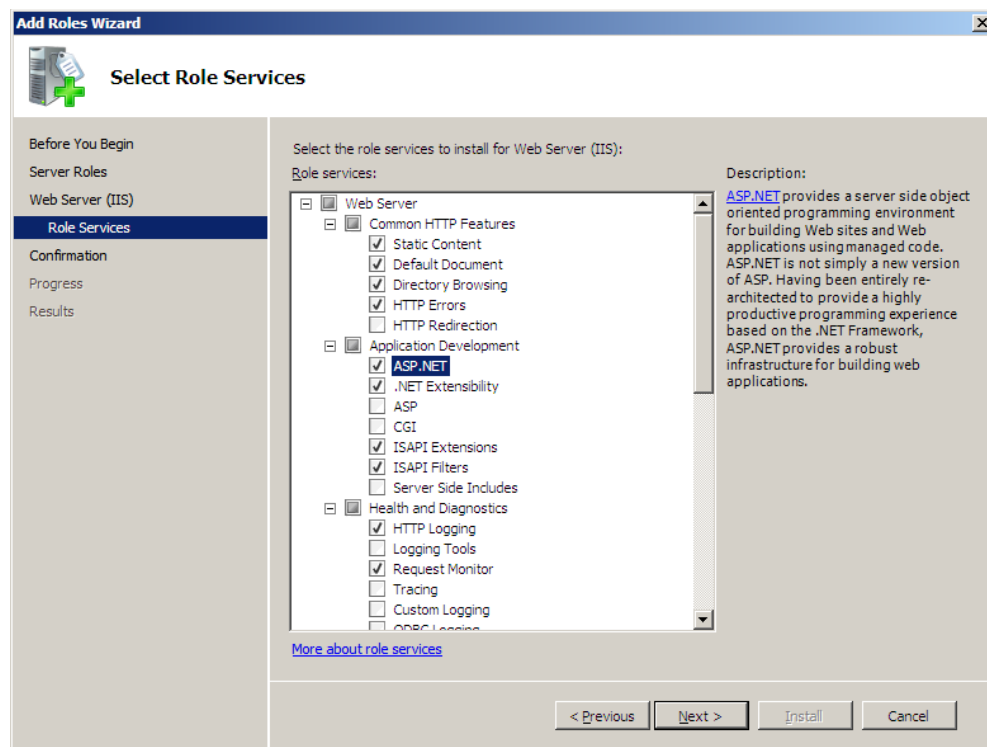
In Windows Server 2008 (IIS 7), launch the Server Manager application (shown in the following screenshot). Click the Roles node in the left pane, click Add Roles in the right pane, and then click Next.



In the Add Roles Wizard (shown in the following screenshot), Web Server (IIS) needs to be selected. If it is not, select it, and then add other components that depend on IIS.



On the **Select Role Services** page, select the **ASP.NET** check box as a minimum. You will be prompted to add other dependent components. Accept all of them.



Click **Next**, and then you will see the **Confirm Installation Selections** page to confirm that you will be adding IIS. Click **Install**.

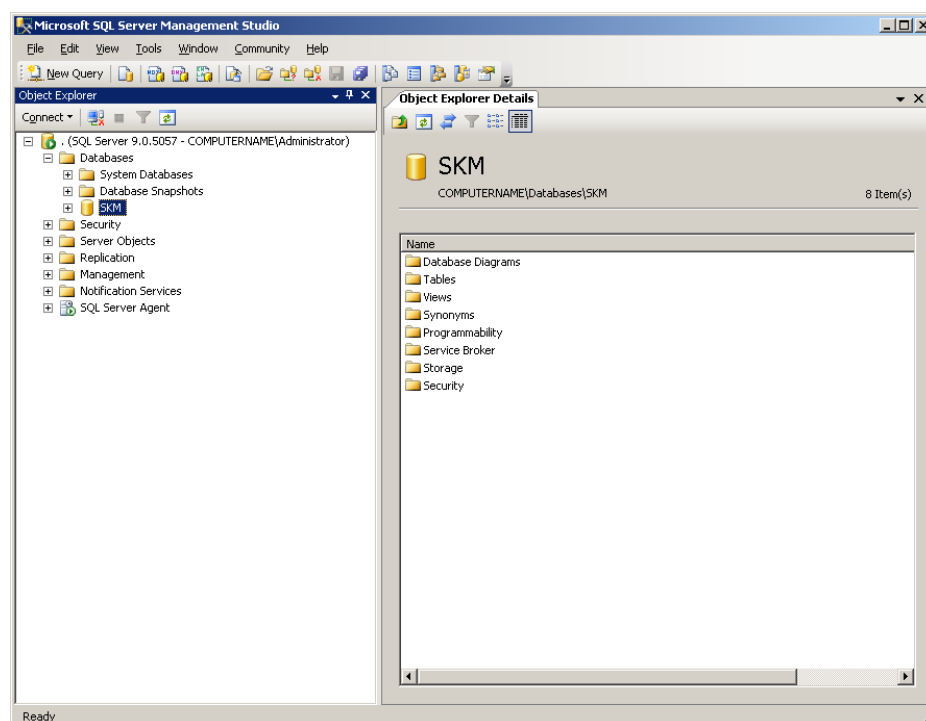
Click **Close** after the wizard has finished installing IIS, and Internet Information Services (IIS) Manager should be available from **All Programs** on the Windows Start menu.

Database Installation

SQL Server

Copy the SKM.sql file to a location on your SQL Server.

Use SQL Server Management Studio, or any other preferred method, to create a new, completely blank database in the location that you choose. It does not matter what the name of the database is. (In the following screenshot, the database name is SKM.)



Run the SKM.sql script on this new database. The script will create a vanilla database for the Training Manager application.

IMPORTANT: You must still manually assign a user on your SQL Server permissions to access the database. At a minimum, this user must be granted “Execute” access on all of the Stored Procedures starting by name with “usp_”. You can use SQL Server Management Studio or any other preferred method. For security reasons, it is recommended that you do not allow the application to login using the ‘sa’ user.

Make a note of the user name and password used to gain access to the database, because you will need to edit the WebSettings.config configuration file in both the SkillsManagerWS folder and the SkillsPortal folder later.

File Installation

Internet Information Services

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

NOTE: For simplicity, you may want to copy these folders under the `C:\inetpub\wwwroot` folder in your environment, because IIS should already be configured to have the correct permissions.

Please refer to Microsoft's documentation for more detailed information about permissions for IIS on Windows.

Windows Server 2003 / IIS6

Launch Internet Information Services (IIS) Manager, which can be found in Administrative Tools in Control Panel.

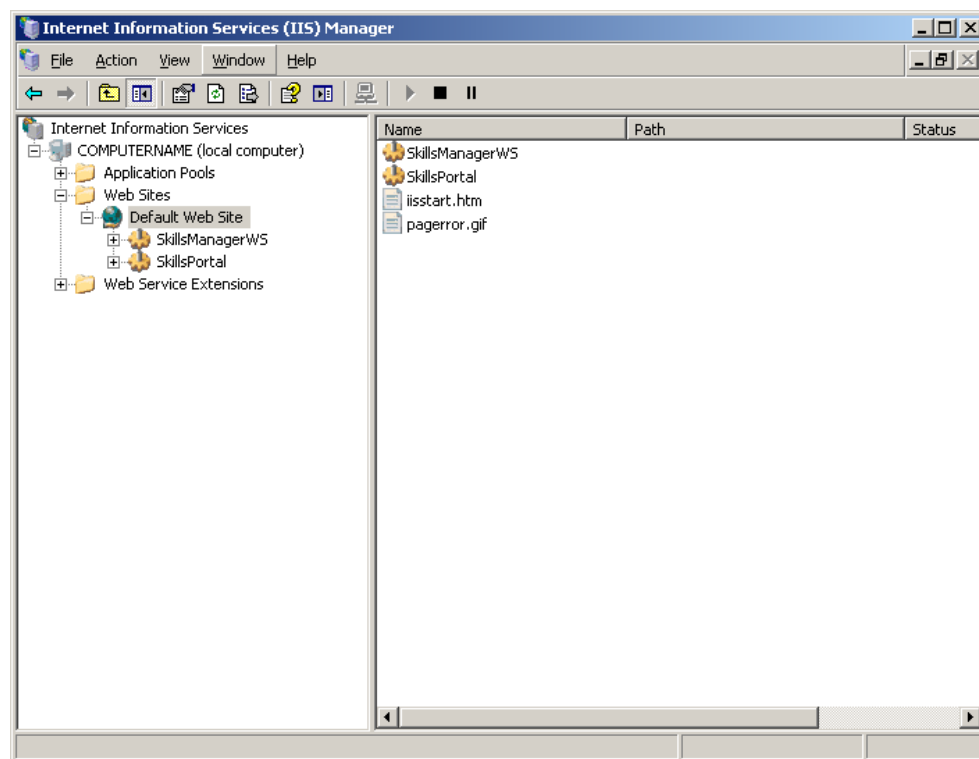
If you have already copied the `SkillsManagerWS` and `SkillsPortal` folders underneath the `C:\inetpub\wwwroot` folder:

1. Right-click `SkillsManagerWS`, and then select Properties.
2. On the Directory tab, click the Create button on the bottom right, and then click OK.
3. Repeat these steps with the `SkillsPortal` folder.

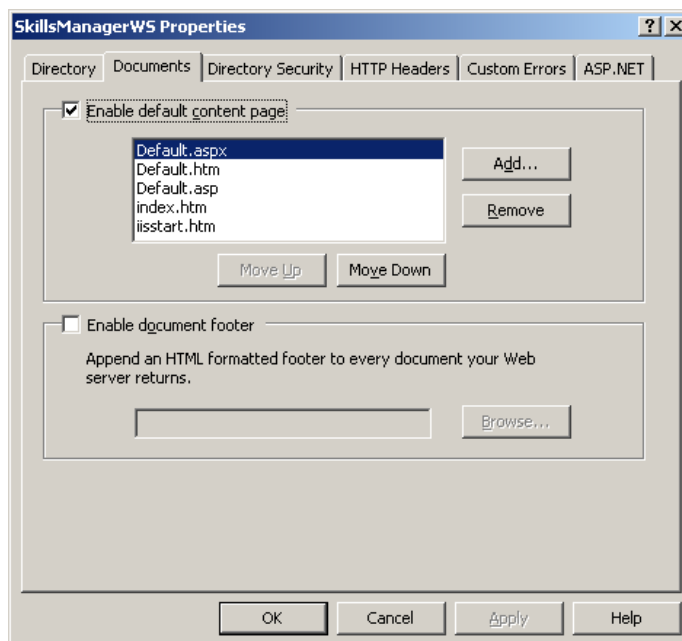
If you have copied the `SkillsManagerWS` and `SkillsPortal` folders elsewhere on your server:

1. Right-click the Default Web Site node, and then select New > Virtual Directory. Click Next.
2. Under Alias, enter `SkillsManagerWS`, and then click Next.
3. Browse to the `SkillsManagerWS` folder, and select it, so that its full path appears in the text box. Click Next.
4. Under Virtual Application permissions, make sure that Read and Run Scripts are selected. Click Next and then finish the wizard.
5. Repeat these steps with the `SkillsPortal` folder.

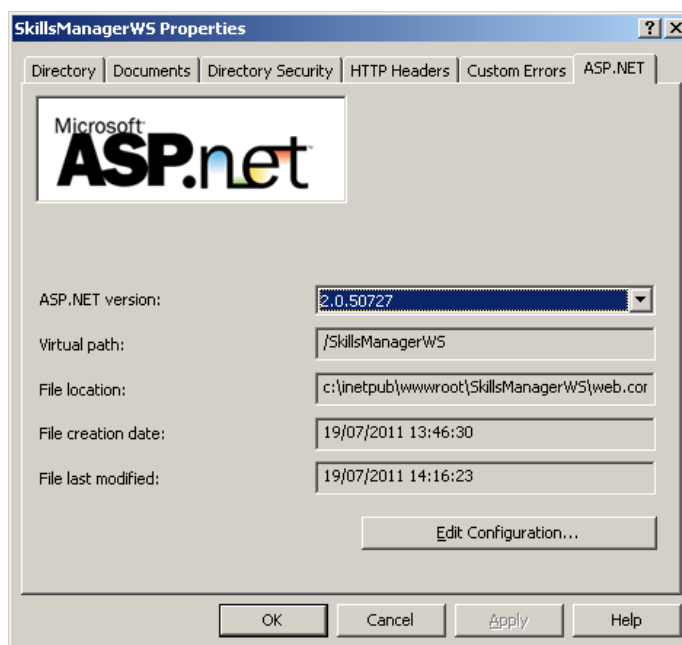
You should now have a screen similar to the one in the following screenshot (in IIS 6).



Right-click SkillsManagerWS, select Properties, and go to the Documents tab. Make sure that Enable default content page is selected. Under this, make sure that Default.aspx is included in the list. Repeat for SkillsPortal.



Go to the ASP.NET tab, and check that the ASP.NET version is set to 2.0.50727 in the drop-down list. If nothing is listed in the drop-down list for the ASP.NET version, ASP.NET is not installed correctly. You will need to open a command prompt and run the `aspnet_regiis -i` command from the `C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727` folder (or `C:\WINDOWS\Microsoft.NET\Framework64\v2.0.50727` if your server is 64-bit).



Repeat for the SkillsPortal folder. This completes the IIS configuration.

Windows Server 2008 / IIS7

Launch Internet Information Services (IIS) Manager, which can be found in Administrative Tools in Control Panel.

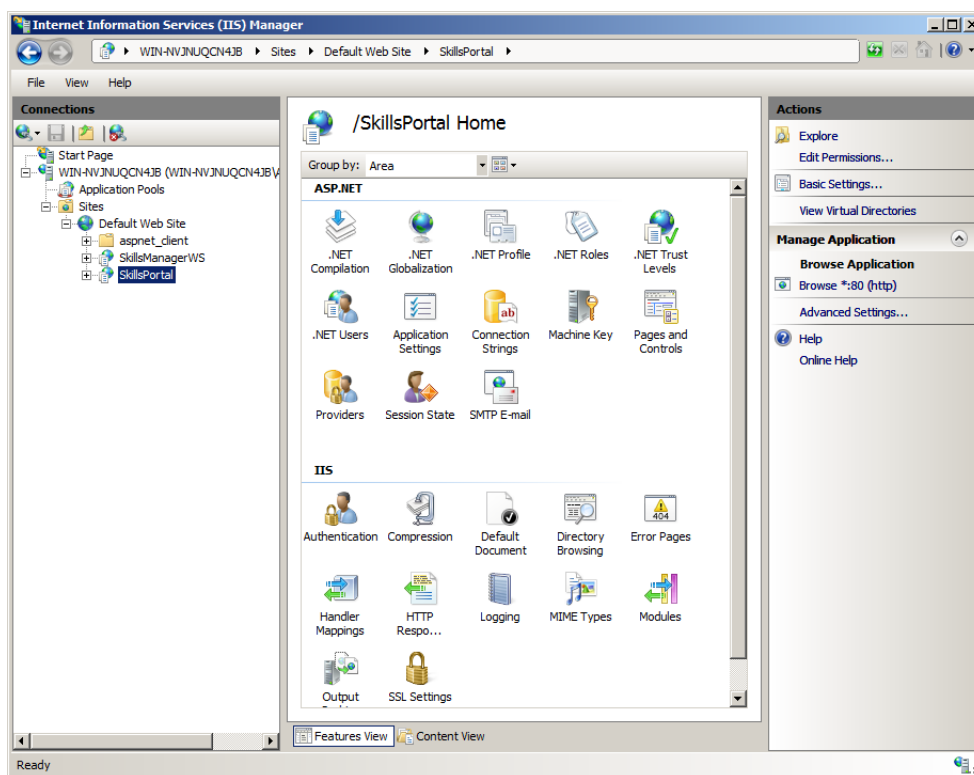
If you have already copied the SkillsManagerWS and SkillsPortal folders underneath the C:\inetpub\wwwroot folder:

1. Right-click SkillsPortal, and then select Convert to Application.
2. Select an appropriate IIS application pool that uses .NET Framework 2.0, e.g. (DefaultAppPool). The application pool should use the Integrated pipeline mode.
3. Right-click SkillsManagerWS, and then select Convert to Application.
4. Select an appropriate IIS application pool that uses .NET Framework 2.0, e.g. (Classic .NET AppPool). The application pool should use the Classic pipeline mode.

If you have copied the SkillsManagerWS and SkillsPortal folders elsewhere on your server:

1. Right-click the Default Web Site node, and then select Add Application.
2. Under Alias, enter SkillsManagerWS.
3. Browse to the SkillsManagerWS folder, and select it, so that its full path appears in the text box.
4. Select the appropriate IIS application pool (as described in the previous numbered section above). Click OK.
5. Repeat these steps with the SkillsPortal folder.

You should now have a screen similar to the one in the following screenshot (in IIS 7) (see next page).



Configuration Files

SkillsManagerWS

In Windows Explorer, find the `SkillsManagerWS` folder you set up earlier. Within this folder, there is a file called `WebSettings.config`. Open this file using Notepad for Windows or another suitable text editor.

In this file, there is this section:

```
<!-- Database Settings -->
<DBConnections>
  <SkillsManager>Server=.;Database=SKM;UID=xxx;PWD=xxx;Trusted_Connection=False</SkillsManager>
</DBConnections>
```

The value of `UID` and `PWD` (currently set to `xxx` for each) needs to be changed to the Login and Password of the SQL Server user account that you set up during [Database Installation](#).

Further down this file, there is a section called “`LogFiles`”. In this section, there are several file paths, e.g.

`C:\WebSiteData\SkillsManagerWS\LogFiles\`

This is a path to where log files are written by the `SkillsManagerWS` web application. In Windows Explorer, either do the following:

- Create a new folder on the IIS machine at the path:
`C:\WebSiteData\SkillsManagerWS\LogFiles`
- 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, find the `SkillsPortal` folder you set up earlier. Within this folder, there is a file called `WebSettings.config`. Open this file using Notepad for Windows or another suitable text editor.

In this file, there is this section:

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

The value of `UID` and `PWD` (currently set to `xxx` for each) needs to be changed to the Login and Password of the SQL Server user account that you set up during [Database Installation](#).

Further down this file, there is a section called “`LogFiles`”. In this section, there are several file paths, e.g.

`C:\WebSiteData\SkillsPortal\Logfiles\`

This is a path to where log files are written by the `SkillsPortal` web application. In Windows Explorer, either do the following:

- Create a new folder on the IIS machine at the path:
`C:\WebSiteData\SkillsPortal\Logfiles`
- 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.

This should now complete the basics needed for the application to work. For a reference to all the settings in the `WebSettings.config` files, see [Appendix A](#).

Optional Branding Configuration

It is possible in Training Manager Portal for your own corporate logo and colors to be displayed when users are logged in. This can be enabled using the following steps:

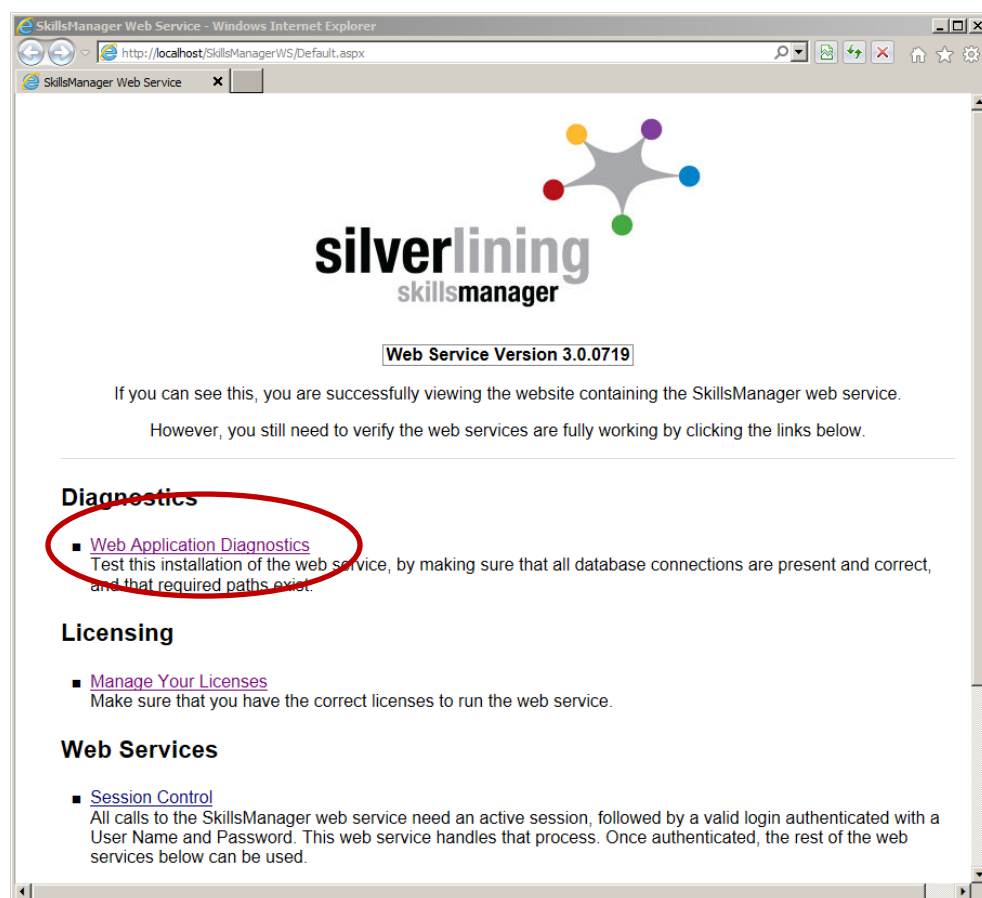
- Create or source a company logo in JPEG format.
- In the `SkillsPortal` folder, there is a sub-folder called `Corporate-Images`. In this folder there is file called `company_logo.jpg`. Directly replace this file with the JPEG file of your company logo.
- In the `WebSettings.config` file, there is a `Branding` section. Change the `ReColorShade` and `HeaderTitleColor` values to your preference.

Server Diagnostic Checks

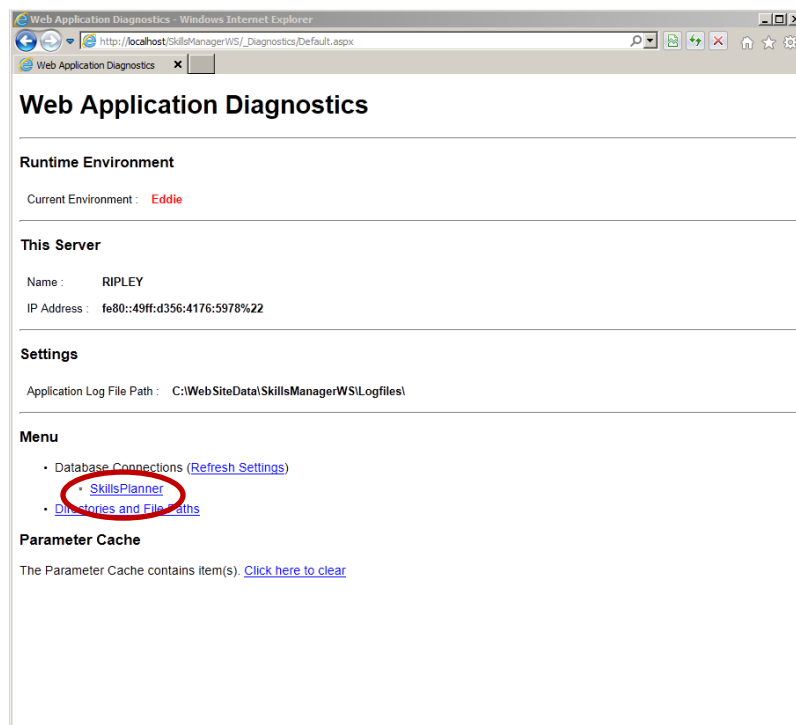
Performing Diagnostics

Open a Web browser, and navigate to where you installed the SkillsManager Web service (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 might look different, depending on the version number you are installing.



Click the SkillsPlanner link (shown in the following screenshot).



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

If there are red crosses (e.g., in the following clip), there will be a problem with your database connection. In the example below, the web application couldn't log in 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
```

See the following page to see what a successful test looks like.

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\SkillsManager\WS\Logfiles\

DBAction Log File Path : C:\WebSiteData\SkillsManager\WS\Logfiles\

Required Database Objects

Tables

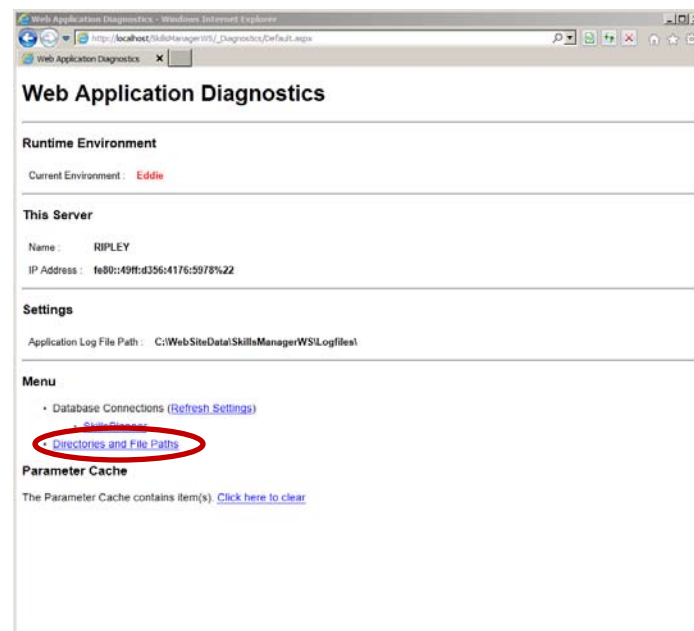
ⓘ No Tables to be checked

Stored Procedures

✓ 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

A successful test should look like the previous screenshot. The information shows that the database connection has been successful, and reconfirms where the Logging information is being written to.

Now, click the **Directories** and **File Paths** link (shown in the following screenshot).



If the logging folders have been set up correctly, you should see something like the following screen shot.

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.

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 some red crosses.

To resolve these you may need to set the correct permissions in Windows so that IIS can read and write to these locations.



Chapter

2 Client Installation

Installation Files

This section will detail what files are required to set up the client portion of Genesys Training Manager.

Client Software Prerequisites

- Windows XP SP2 (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 Training Manager Portal.
 - Minimum of Internet Explorer 6 or higher. Internet Explorer 7 or above is recommended.
 - Google Chrome.
 - Mozilla Firefox.


Required Files

- Client installation package (GenesysTrainingManagerSetup.msi)

Client Installation Procedure

On the client PC, copy the `GenesysTrainingManagerSetup.msi` file to a suitable working location. Double-click the file to install the application, and two desktop icons will appear. One is called Training Manager, and the other is called Training Manager Configuration Utility.

IMPORTANT: You must run Training Manager Configuration Utility before running Training Manager for the first time.



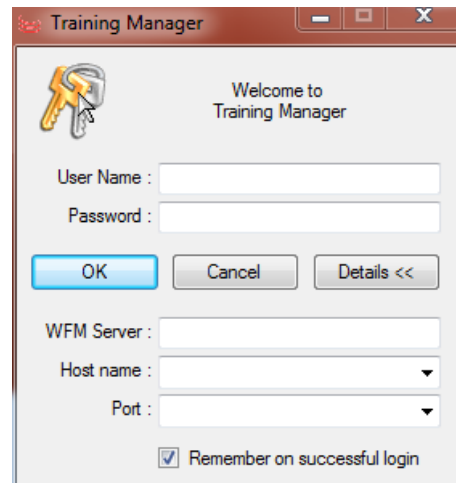
The screenshot shows the 'Genesys Training Manager Configuration Utility' dialog box. It has a title bar with a red close button. The dialog contains four main sections with labels on the left and input fields or checkboxes on the right. The first section is 'Web Service URL' with a text box containing 'http://localhost/SkillsManager/WS/'. Below it is a descriptive text: 'Location of the main SkillsManager Web Service e.g. http://your-server/SkillsManager/WS/'. The second section is 'Proxy Server URL (Optional)' with an empty text box and a description: 'Location of your proxy server used for both SkillsManager Web Service and WFM APIs'. The third section is 'Web Service Connection Timeout' with a text box containing '25000' and a description: 'Time (in milliseconds) to wait when connecting to the SkillsManager Web Service.'. The fourth section is 'Web Service Authentication' with a checkbox labeled 'Use NTLM (Integrated Windows Authentication)' which is currently unchecked. Below the checkbox is the text: 'Leaving this unticked will assume Anonymous Authentication'. At the bottom right are 'OK' and 'Cancel' buttons.

Web Service URL	<input type="text" value="http://localhost/SkillsManager/WS/"/>	Location of the main SkillsManager Web Service e.g. http://your-server/SkillsManager/WS/
Proxy Server URL (Optional)	<input type="text"/>	Location of your proxy server used for both SkillsManager Web Service and WFM APIs
Web Service Connection Timeout	<input type="text" value="25000"/>	Time (in milliseconds) to wait when connecting to the SkillsManager Web Service.
Web Service Authentication	<input type="checkbox"/> Use NTLM (Integrated Windows Authentication)	Leaving this unticked will assume Anonymous Authentication

In the Training Manager Configuration Utility, you will need to specify the full URL of the `SkillsManagerWS` folder that was set up in IIS - for example, `http://myintranet.mycompany.com/SkillsManagerWS/`.

Launching the Client

To run Training Manager, double-click the Training Manager desktop icon. All of the login details on the Login screen (shown in the following screenshot) will be blank the first time you launch the application.



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

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

- Your user name and password to Genesys WFM
- Application name of your Genesys WFM system (This is configured in Genesys CME.)
- Host name and port of your Genesys WFM system.

Click OK, and upon a successful login, you will see the main screen.

This confirms the successful completion of the Training Manager GUI installation and setup.

IMPORTANT: To use Training Manager effectively, you must use a Genesys WFM login that has access to the master schedule and scenarios, and all of the sites and teams for which you want your users to be able to schedule training and meetings.



Appendix

A Server Configuration Files

SkillsManagerWS

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

WebSettings.config Sections

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

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

Section	Description
Features	Specifies what features are available to Training Manager users.
DBConnections/SkillsManager	Contains the database connection string. You will need to modify this to specify the name of the database you created earlier, as well as the user name and password used to access this database.
WebServices/SkillsAssess	Specifies the location of Genesys Skills Assessor, so that Training Manager can pull results from the system.

Section	Description
WebServices/AutoTeamUpdates	Specifies the location of an HR system that allows manager/team relationships to be automatically updated within Training Manager at a customer's site. This is an optional setting—whether it is used will be determined during the discussions prior to installation, and the setting should not be changed without guidance.
LogFiles/Application LogFiles/DBConnection LogFiles/DBAction	Specify the paths of log file folders. The application is able to generate logs if anything goes wrong. Therefore, it is important to specify the paths of folders that exist on your server.
LoginMessage	Specifies a message that Training Manager displays to every user when users log in.

SkillsPortal

This section details the `WebSettings.config` configuration file in the SkillsPortal (Training Manager Portal) web application.

WebSettings.config Sections

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

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

Section	Description
Homepage	Specifies the home page of the portal. Do not change this setting.
DBConnection	Contains the database connection string. You will need to modify this to specify the name of the database you created earlier, as well as the user name and password used to access this database.

Section	Description
WebServices/AutoTeamUpdates	Specifies the location of an HR system that allows manager/team relationships to be automatically updated within Training Manager at a customer's site. This is an optional setting—whether it is used will be determined during the discussions prior to installation, and the setting should not be changed without guidance.
LogFiles/Application LogFiles/DBConnection LogFiles/DBAction	Specify the paths of log file folders. The application is able to generate logs if anything goes wrong. Therefore, it is important to specify the paths of folders that exist on your server.
Branding/Colors/ReColorShade Branding/Colors/HeaderTitle	<p>Specifies color information that is used to apply branding to the Training Manager Portal when users are logged in.</p> <p>The ReColorShade specifies the general color scheme used throughout the Portal.</p> <p>The HeaderTitle specifies the color of the text in the top right-hand corner of the browser.</p> <p>These color values need to be specified as hex values, e.g., #B3392A.</p>

