



Training Manager 8.1.1

Upgrade Guide from 8.1

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: 81training_manager_upgrade_08-2012_v8.1.101.00

Table of Contents

Preface	Preface	5
	About Genesys Training Manager	5
	Intended Audience	5
	Making Comments on This Document	6
	Contacting Genesys Technical Support.....	6
	Related Documentation Resources	6
	Genesys	6
	Document Conventions	7
	Document Version Number.....	7
	Screen Captures Used in This Document	7
	Type Styles.....	7
Chapter 1	Server Configuration	9
	Installation Files.....	9
	Server Software Prerequisites	9
	Database Server Software Prerequisites	9
	Web Server Software Prerequisites	9
	Required Files	10
	Database Upgrade	11
	SQL Server.....	11
	File Upgrade.....	12
	Internet Information Services	12
Chapter 2	Client Installation	13
	Installation Files.....	13
	Client Software Prerequisites.....	13
	Required Files	13
	Client Installation Procedure	14
	Launching the Client	14



Preface

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

This document is valid only for the upgrade of 8.1 to 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 8](#).

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 have a current deployment of Genesys Training Manager and intend to upgrade to 8.1.1.

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 titlesEmphasisDefinitions of (or first references to) unfamiliar termsMathematical 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>A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession.</p>

Monospace font (Looks like teletype or typewriter text)	All programming identifiers and GUI elements.	Select the Show variables on screen check box.
Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise. 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.	<code>smcp_server -host <confighost></code>



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

These requirements are identical to those in the Installation Guide.

Note: **IMPORTANT:** 8.1 did not require .NET Framework 3.5 SP1 to be installed, however 8.1.1 does (this is for the Training Manager Portal).

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)
- ASP.NET installed and enabled

- .NET Framework 2.0 installed. Should already be installed by default on Windows Server 2008 and Windows Server 2008 R2. May need to be installed separately on Windows Server 2003.
- .NET Framework 3.5 SP1 installed. Should already be installed by default on Windows Server 2008 R2. May need to be installed separately on the original release of Windows Server 2008.

Required Files

- Database upgrade script file (Migration Script 8.1 to 8.1.1.sql). This is located in the Database Scripts/Migration 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.

Database Upgrade

SQL Server

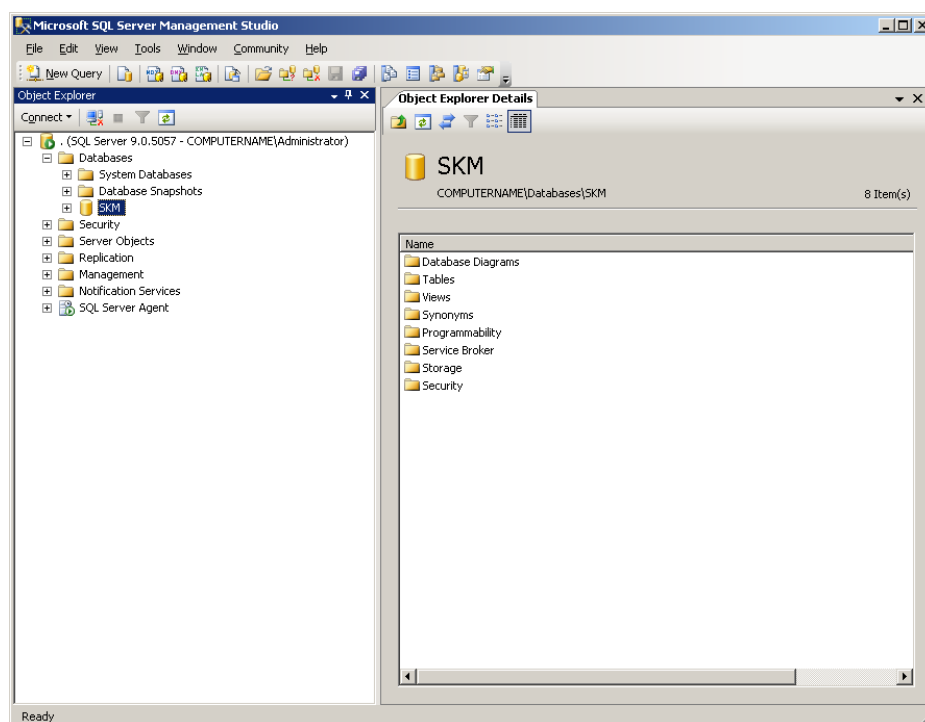
Copy the Migration Script 8.1 to 8.1.1.sql file to a location on your SQL Server.

Make sure that no-one is logged in and using Training Manager.

IMPORTANT: Back up the Training Manager database. This database will have been named when Training Manager was installed. Within the screenshots that follow, the database name SKM is used.

Use SQL Server Management Studio, or any other preferred method, to run the script against the Training Manager database.

Only run the script once. If there is an error running the script, please contact Technical Support.



File Upgrade

Internet Information Services

Copy the `SkillsManagerWS` and `SkillsPortal` folders to a temporary location on your IIS server.

- Locate the `SkillsManagerWS` and `SkillsPortal` folders in the current installation.
- Back up the entire contents of these folders to a secure location. This step is required in case there is any need to roll back the upgrade.
- Delete everything inside the `SkillsManagerWS` and `SkillsPortal` folders, EXCEPT for the `WebSettings.config` file. The `WebSettings.config` files should be retained since they contain your own configuration settings.
- Copy the contents of the upgraded `SkillsManagerWS` folder to the `SkillsManagerWS` folder in your current installation. Do not overwrite the `WebSettings.config` file with the one from the upgrade package as doing so will destroy any installation specific settings.
- Copy the contents of the upgraded `SkillsPortal` folder to the `SkillsPortal` folder in the current installation. Do not overwrite the `WebSettings.config` file with the one from the upgrade package as doing so will destroy any installation specific settings.
- If a bespoke corporate logo was previously applied (located in the `Corporate-Images` folder in the Training Manager Portal), this will need to be restored from the backup copy of `SkillsPortal`.



Chapter

2 Client Installation

Installation Files

This section will detail what files are required to set up the client portion of Genesys Training Manager. These requirements have not changed from 8.1.

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.

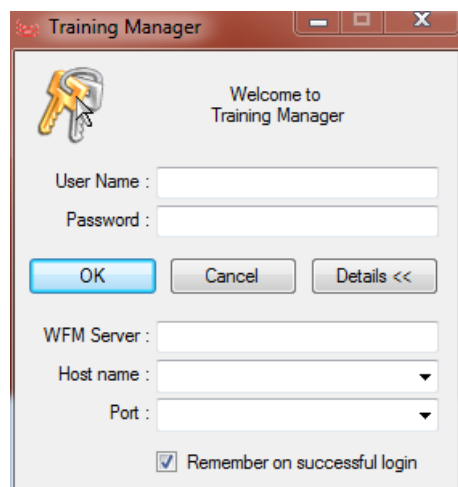
Uninstall the previous version of the client application, by visiting Add/Remove Programs in the Windows XP Control Panel, or Programs and Features in the Windows Vista or Windows 7 Control Panel.

Double-click the file to install the new version of the application.

Launching the Client

To run Training Manager, double-click the Training Manager desktop icon. On the login screen (pictured below) the following details should be remembered:

- 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 client upgrade.