



Skills Management 8.5.648

Automated Installation and Upgrade Guide (Command Line)

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1 Introduction

This guide provides instructions for installing or upgrading the Skills Management suite via the Skills Management Setup MSI application in command line mode.

2 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.

2.1 Database Server Software Prerequisites

- **Windows Server 2008 / 2008 R2 / 2012** (or higher) with latest available updates and service packs (for SQL2008R2 Service Pack 3 is required).
- **Microsoft SQL Server** of the following version / service pack (or higher)
 - **2008 SP4**
 - **2008 R2 SP3**
 - **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 Analysis Services should be available on the server

2.2 Web Server Software Prerequisites

- **Windows Server 2008 / 2008 R2 / 2012** (or higher) with latest available updates.
- **Microsoft .NET Framework 4.5.2** 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:

- **Crystal Reports Runtime**, available from:
http://downloads.businessobjects.com/akdlm/cr4vs2010/CRforVS_redist_inst_all_32bit_13_0_12.zip
- **Note: Crystal Reports** functionality is only supported for **Internet Explorer version 8** or above and the latest versions of other browsers (e.g. **Chrome**, **Firefox** and **Safari**).
- 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
 - Features
 - .NET Framework 3.5
 - .NET Framework 4.5 Features
 - .Net Framework 4.5
 - ASP.NET 4.5
 - WCF Services
 - HTTP Activation
 - Named Pipe Activation
 - Windows Identity Foundation 3.5
- Administrator access to the server
- 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 is set to use the latest possible standards mode.

Note: 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).

2.3 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.

2.3.1 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 on it.
4. If the user account in question does not appear in the list, add it using the **Add User or Group** option.
5. Click **OK** to close the dialog box.
6. Double-click on 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.

2.3.2 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.

2.4 Networking pre-requisites

To allow DNA to be enabled, the MSTDC service on the database server must be accessible over the network from the web application server (i.e. not blocked by a firewall) – for details on checking MSDTC connectivity, see:

<http://blogs.msdn.com/b/distributedservices/archive/2008/11/12/troubleshooting-msdtc-issues-with-the-dtcping-tool.aspx>

3 Installation

Copy the release package to the web server. Start a command line console (cmd.exe) window in administrator mode.

Run `msiexec` with the name of the `Skills ManagementSetup_v4.1.0.msi` to begin the installation, e.g.:

```
msiexec /i Skills ManagementSetup.msi
```

Ensure that the “Skills ManagementSetup.msi” value is modified to match

Additional parameters can also be used to provide values for variables required by the installer. The following table provides information about these additional parameters.

Parameter	Default value	Explanation
SERVICESFOLDER	x:\SLS\Websites\Services	The folder in which the services will be installed.
SERVICESVIRTUALDIR	Services	The virtual directory that will be created in IIS that points to the services folder.
PORTALFOLDER	x:\SLS\Websites\Portal	The folder in which the Portal website will be created.
PORTALVIRTUALDIR	Portal	The virtual directory that will be created in IIS that points to the Portal folder.
SKILLS ASSESSORFOLDER	x:\SLS\Websites\Skills Assessor	The folder in which the Skills Assessor website will be created.
SKILLS ASSESSORVIRTUALDIR	Skills Assessor	The virtual directory that will be created in IIS that points to the Skills Assessor folder.
LOGINFOLDER	X:\SLS\Websites>Login	The folder in which the Login website will be created.
LOGINVIRTUALDIR	Login	The virtual directory that will be created in IIS that points to the Login folder.
MISCFOLDER	x:\SLS\	The folder in which the Reports, Logs and QMedia folders will be created.
DBSERVER	.	The database server name to use for configuration and installation of databases.
TRAINING MANAGERDB	Training Manager	The name for the Training Manager database

Parameter	Default value	Explanation
REPORTSDB	Skills ManagementReports	The name for the Reporting database
SKILLS ASSESSORDB	Skills Assessor	The name for the Skills Assessor database
DNADB	DNA	The name of the DNA database
DBAUTH	SQL	The authentication method to use in the connection strings created in the various service / website configuration files. Can be either SQL or WIN (SQL Server authentication or Windows authentication).
DBUSER		The user to create in SQL Server, and the user to use in connection strings if the selected DB authentication method is SQL .
DBPASSWORD		The password to use for the DBUser, if DB authentication is SQL .
DBINSTALLAUTH	WIN	The authentication method to use whilst installing the database. As per DBAUTH.
DBUNINSTALLAUTH	WIN	(Uninstall only) The authentication method to use whilst uninstalling the database. As per DBAUTH.
DBINSTALLUSER		If the install/uninstall authentication mode is SQL , this is the username used to install the database.
DBINSTALLPASSWORD		If the install authentication mode is SQL , this is the password used to install the database.
SITEHOSTNAME	localhost	The site name that the services will be registered against in the config files, and the hostname used when showing the post-install page.
SERVICEALLOWANON	Yes	Yes if the services should be configured to run under anonymous access, anything else if the services should be configured to use Windows Authentication. Note that the Yes is <i>case-sensitive</i> .

Parameter	Default value	Explanation
USEHTTPS		<p>Yes if the websites and services should be configured to run under HTTPS, anything else if the services should be configured to use HTTP.</p> <p>Note that the Yes is <i>case-sensitive</i>.</p>
REMOVEDBS		<p>(Uninstall only) Yes if the databases should be removed by the installer. Anything other than Yes will mean the databases are left as they are.</p> <p>Note that the Yes is <i>case-sensitive</i>.</p>
REMOVEUSER		<p>(Uninstall only) Yes if the SQL server user should be removed by the installer (only has any effect if REMOVEDBS is also Yes).</p> <p>Anything other than Yes will mean the users are left as they are.</p> <p>Note that the Yes is <i>case-sensitive</i>.</p>
STSENABLED		<p>Set this property to Yes if you want to enable AD authentication via the STS service.</p> <p>Note that the Yes is <i>case-sensitive</i>.</p>
STSCERTTHUMBPRINT		<p>Set this property to the certificate thumbprint of the certificate that you want to use. This should be a single string with no spaces. Also, ensure that you delete the invisible character at the beginning of the string if you copy and paste it from the certificate properties.</p>
TENANTADMINLOGIN		<p>Set this property to the tenant administration administrator username.</p>
TENANTADMINPASSWORD		<p>Set this property to the tenant administration password.</p>

3.1 Additional options

3.1.1 Logging

To get a complete log of all output from the install, you should include:

```
!*\v logFileName.txt
```

3.1.2 UI visibility

/q – don't show the user interface

/passive – shows a basic progress bar

3.1.3 Advanced installation

This installation specifies a value for all the properties. No user interface will be displayed and all installer steps are logged to log.txt.

```
msiexec /i Skills ManagementSetup.msi SKILLS ASSESSORVIRTUALDIR="Skills
ManagementSkills Assessor" PORTALVIRTUALDIR="Skills ManagementPortal"
LOGINVIRTUALDIR>Login" SERVICESVIRTUALDIR="Skills ManagementServices"
TRAINING MANAGERDB="Skills ManagementTraining Manager" SKILLS
ASSESSORDB="Skills ManagementSkills Assessor" REPORTSDB="Skills
ManagementReporting" DNADB="DNA" MISC_FOLDER="c:\Skills
Management\OtherFiles" PORTAL_FOLDER="c:\Skills Management\Apps\Portal"
SKILLS ASSESSOR_FOLDER="c:\Skills Management\Apps\Skills Assessor"
LOGIN_FOLDER="c:\Skills Management\Apps>Login" SERVICES_FOLDER="c:\Skills
Management\Services" DBUSER="pdnauser" DBPASSWORD="pdn4u53r"
DBSERVER="localhost" DBAUTH="SQL" DBINSTALLAUTH="SQL" DBINSTALLUSER="sa"
DBINSTALLPASSWORD="sa" SITEHOSTNAME="www.blue.com" SERVICEALLOWANON="Yes"
USEHTTPS="No" TENANTADMINLOGIN="admin" TENANTADMINPASSWORD="notpassword"
STSENBLED="No" STSCERTTHUMBPRINT="" /q /l*v log.txt
```

Note: If you set the USEHTTPS parameter to “Yes” then all the applications and services will be configured in IIS to use HTTPS rather than HTTP. Note that in this event, you should ensure that your webserver has a valid HTTPS binding, and that the host name you enter is valid for the certificate configured for the site in IIS.

Note: If you wish to upgrade Skills Management from version 4.2.0 or earlier, you must first uninstall the old Skills Management server components via Control Panel -> Programs and Features before running the installer / installing via the command line parameters.

If you've previously installed/upgraded the software via the automated setup application or command line program, ensure that you input the same command line settings when upgrading to a newer version.

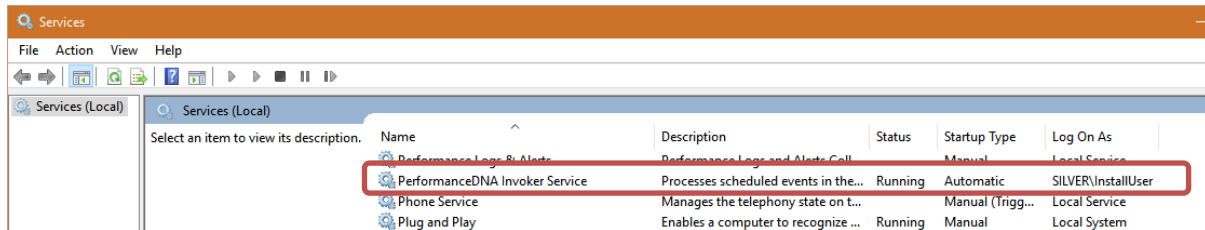
If you require DNA, follow the steps to configure DNA from the **Skills Assessor v4.6.0 Manual Installation Guide**.

If you require STS and/or the Notifications client, follow the steps in the **Installing and configuring AD authentication via the SLS Secure Token Service and Notifications 1.0 Client v4.6.0 Installation Guide** documents.

3.1.4 Check service credentials

Verify the credentials you entered were correct by checking the **Services** Administrative Tool.

Locate the **Skills Management Invoker Service** in the list of services, and ensure it is running. If it is not, this may be because the service account was not given log on as a service rights.



If the service is not running and you are using a local computer account (rather than a domain account) you can double-click the service and correct the credentials in the **Log On** tab.

If you are using a domain account, ensure that it has the rights to log on as a service and refresh the local group policy by running **gpupdate /force** from an elevated command prompt.

4 Exported Portal Users

The upgrade to Skills Management 4.8 creates a backup file containing Portal users which must be imported via Skills Assessor in order to complete the upgrade process. Running the Skills ManagementSetup_v8.5.648, entering the required information in each screen will result in a final 'Completed the Server Components Setup Wizard' screen. This screen will also contain the path to the exported Portal users file, called PortalUsers.csv. Once the upgrade is completed, login to Skills Assessor as an administrator and follow the wizard to complete the upgrade process. This will require importing the PortalUsers.csv file.

If you are upgrading an Azure instance of Skills Management, the PortalUsers.csv file will be created in the directory from which you ran the Setup-Skills ManagementAzure.ps1 powershell script.

5 Additional steps required to complete an upgrade to version 4.8.

Upgrading from versions prior to 4.7 to 4.8 requires additional steps to import Training Manager users into Skills Assessor. After finishing the Skills Management upgrade (via the installer or Powershell script for Azure deployments), a file will be created (named PortalUsers.csv) which contains all of the Portal users that need to be imported into Skills Assessor to complete the upgrade. This file will be created in the directory where the Skills Management installer/azure script is located and is required to complete the upgrade process. It is important that the user performing the upgrade has write permissions to the folder from which the installer/Azure script is executed to ensure that this file is written successfully. If the release package was provided on a non-writeable medium, e.g. DVD, ensure that the installer/Azure script are copied to a writeable location before running them.

Follow the steps below to complete the upgrade process.

1. Login to the Skills Assessor tenant administration area (via the 'localhost' address).
2. Click the Tenant Management option in the menu. On the right side of the Manage Tenants page.
3. Select the tenant that you have mapped to your Training Manager deployment and click its associated **Import Portal Users** link.
4. A Settings page will appear, requiring the selection of relevant user fields for the Portal Username, Portal Employee ID, Email and Location fields. Either select the relevant fields using the associated select box or click the **New** button to create a new user field which will be used for the mapping of the relevant list item. The location delimiter specifies the character that you wish to use to delimit locations. Click **Next**. The validation process may take several minutes to complete.
Note: You must map one or more fields to the LoginId.
5. In the Import page, click the **Choose File** button to select the portal users file. Click the **Next** button.
6. The **Import Preview** page will display a table of the number of users that will be created or updated in each Portal role and the total number of created/updated users. This page will also display any validation errors that were identified in the import file. At this point it is possible to end the process without completing the user import in order to make corrections to the import file. Alternatively, click the **Import** button to import the users. Depending on the number of users in Portal and Skills Assessor, the upgrade may take several minutes to complete.
7. Once the import has completed, a confirmation message will be displayed. Click the Finish button to complete the upgrade process. Skills Assessor tenants will now be available for use again. If the Import is unsuccessful, correct your user import file and repeat the process.

Notes:

- All Skills Assessor tenants will be unavailable following the upgrade until the Portal users file has been imported. Training Manager users should not be modified until the Portal users file has been imported into Skills Assessor.

Additional steps required to complete an upgrade to version 4.8.

- When upgrading Skills Management to version 4.8 it is not possible to include fields that contain different data into a single field, i.e. mapping UserName and EmployeeID into LoginID. If any of the data in these fields is different the import will fail.

6 Post upgrade steps

6.1 Reconfigure DNA after switching between HTTP and HTTPS

NOTE: This step only applies if DNA was configured prior to the upgrade.

If you have chosen to setup the site in HTTPS mode and the site was previously in a non-HTTPS configuration (or vice-versa) you need to reconfigure the DNA Data service endpoint for each DNA enabled tenant.

Log into the Tenant Administration screen and then for each affected tenant:

- Click the **Setup DNA** option.
- Untick the **DNA Enabled** checkbox to temporarily disable DNA.
- Click the **Click to edit DNA Database** settings option.
- Change the **DNA Data Service URL** option to match the protocol now in use on your site (i.e. change the URL prefix to either http:// or https:// as appropriate)
- Click the **Save DNA Database settings** option
- Re-tick the **DNA Enabled** checkbox.
- Click the **Test DNA Setup** button.
- Close the popup.

6.2 Configure Training Manager-Skills Assessor Integration

In previous versions, the Training Manager-Skills Assessor integration (the setting of the Skills Assessor URL and tenant ID) was configured via the SkillsManagerWS web.config file. These settings have been moved to the Settings page in Portal and must be replaced after an upgrade. To update these settings:

1. Login to portal as an Administrator
2. Click the system settings page link
3. Set the Skills Assessor URL. Once this has been set the Tenant dropdown will be populated with a list of tenants.
4. Select the Tenant that Training Manager should integrate with.
5. Click the Save button.

Training Manager client users will then be able to connect to the Skills Assessor tenant specified.

6.3 3rd Party Authentication

The latest version of Skills Assessor and Portal now allow for a 3rd party authentication scheme. This requires a software component provided by a customer to authenticate against a customer's database of users. This facility is provided as an alternative to the STS configuration.

When configured correctly the login screen will re-direct to a customer provided web site to enter user credentials. The 3rd party application will need to call a Web service provided by Silver Lining with an authentication token when the user is authenticated. The 3rd Party Application will then re-direct back to a landing page which will validate the authentication token and log the user in to the system.

6.3.1 Skills Assessor Configuration

The following settings must be provided in the System Settings for Skills Assessor to enable 3rd Party Auth:

Optimizer URL	<input type="text" value="http://localhost/optimizer"/>
Enable Third-Party Authentication	<input checked="" type="checkbox"/>
Third-Party Authentication Login Page URL	<input type="text" value="http://localhost/mockslsauth/userlogin/authenticate"/>
Third-Party Authentication Logout Page URL	<input type="text" value="http://localhost/mockslsauth/userlogin/logout"/>
User Field for Third Party Authentication	<input type="text" value="Job Title"/>

- A Tick box to enable 3rd Party Auth, this makes the other fields appear.
- The 3rd Party Auth login page.
- The 3rd Party Auth logout page.
- The user field in Skills Assessor to use for choosing which user to login.

6.3.2 Portal Configuration (via Training Manager)

The following settings must be provided in the Portal Settings page of Training Manager to enable 3rd Party Auth:

<input checked="" type="radio"/> SLS Third Party	Authenticate with	<input type="text" value="User Name"/>
	Login URL	<input type="text" value="http://localhost/mockslsauth/userlogin/authenticate"/>
	Logout URL	<input type="text" value="http://localhost/mockslsauth/userlogin/logout"/>

- A drop down so you can choose whether to use the user name or employee name for authentication.
- The 3rd Party Auth login page.
- The 3rd Party Auth logout page.

6.3.3 Setting the e-mail ADG for IEX WFM

In previous versions the IEX e-mail ADG was specified via the SkillsManagerWS/WebSettings.config file. This setting has been removed from this file. The e-mail ADG is now set in the SkillsPortal screen of the Training Manager client (labelled

“Email ADG Name”). The upgrade process does not retain this value, therefore, it is necessary to replace it in the SkillsPortal settings screen after upgrading.

6.4 Configuring Updating Routing Skills

6.4.1 Connectivity Overview

Skills Assessor updates routing skills in Genesys through the GIS SOAP webservice interface. Firstly a connection is made to the **SessionService** service to get a GIS Session token, then various calls are made to the **CSPProxyService** service to retrieve and update information in CME.

6.4.2 Configuring Skills Assessor to work with GIS

6.4.2.1 Required database entry

Before the configuration options for GIS will appear in Skills Assessor, a new record needs adding to the Providings table. The following script will create the appropriate setting for all tenants:

```
INSERT INTO dbo.Providings (TenantID, SystemNumber, SystemName, SystemTitle,
    SystemVersion)
SELECT      t.TenantID, 101, 'Genesys', 'Genesys', 'GIS'
FROM        dbo.Tenants t
WHERE       t.TenantID > 0
           AND NOT EXISTS (SELECT * FROM dbo.Providings WHERE SystemNumber=101 AND
    TenantID=t.TenantID)
```

For further instructions on setting up GIS Authentication options, please see the Skills Assessor Administrator guide.

7 Licensing

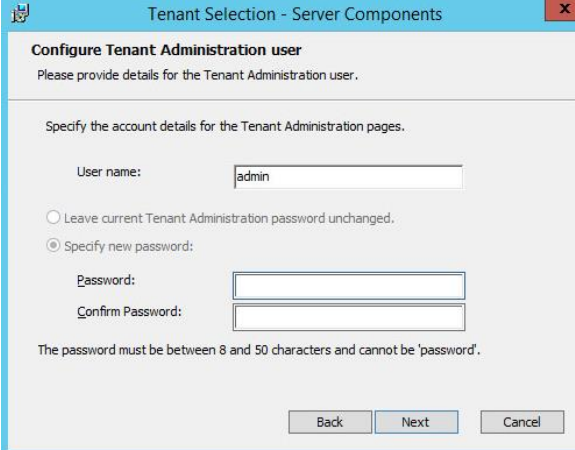
The following sections describe the licensing options in Skills Assessor and Training Manager. If you have upgraded your product and your licences are still valid, there is no need to modify your existing licensing settings.

7.1 Licensing Skills Assessor

7.1.1 Tenant Administration

The Tenant Administration part of the application is accessible through the web server's hostname/login/admin, e.g. <http://yourserver/login/admin>.

To login to the tenant administration area, use the tenant administration account details that were specified during the install/upgrade process (see below screenshot of the relevant installer screen, note – this screen will not be available if using the command-line only installer or Azure install/upgrade script).



Once logged in you should see the Tenant Management screen.

1. Click the **Create New Tenant** button.
2. Enter the name and primary contact details for the tenant that will be using the application, then click **Next**.
3. Enter the license details for this tenant into the boxes provided then click **Next**. If you do not have a licence for Skills Assessor but have a licence for Training Manager, complete the host name and specify a licence date, e.g. **01/01/2030**. The remaining licence fields should be left blank. This will result in only core Skills Assessor functionality being available. It will be necessary to enter your Training Manager licence (via the steps in the following section) in order to use the system.
4. Enter the administrator user details to create a new administrator for the tenant.
5. Click **Finish** to close the wizard.

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.

7.2 Licensing Training Manager

To set up your Training Manager license open a web browser and navigate to the **SkillsManagerWS** application, e.g. <http://localhost/SkillsManagerWS/Default.aspx> (or right-click the **SkillsManagerWS** folder within IIS, and then select **Browse**).

Click the **Manage Your Licenses** link. A form will appear allowing you to enter your Training Manager product license. Complete the form and click the **Add/Update License** button to add a new product license. Alternatively, if you have already added licenses, click one of the links at the top of the form to view and/or edit the existing license(s).

Manage Your Licenses

Click on any of the licenses below to view.

- www.blue.com

Add New License

⚠ Required fields

Please fill in the details you have been supplied by Silver Lining Solutions. If you do not have these details, please contact us.

Company Name

Number of Licensed Users

License Expiry Date (e.g. 31 December 2010)

Host Name or IP Address (e.g. mycompany.com)

Enter License Key

[Return to the Web Service Home Page](#)

Figure 1: Licensing

The system will be available once you have either an Skills Assessor licence, Training Manager licence or both. The widgets that are available in the system will be based on the licence status, i.e. all widgets for both Skills Assessor and Portal will only be available if you have a valid licence for both products. If you have one valid product licence, only the widgets that are related to that product will be available. Skills Assessor administrators will be able to see all Skills Assessor widgets. Similarly, Portal Administrators will be able to see all Portal widgets. If you have both Skills Assessor and Training Manager licences, it will be possible to assign users to both Skills Assessor and Portal administrator roles so that they will be able to have full access to the widgets of both products. Other users' access is restricted based on the widgets available to their assigned roles.