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About This Software

This CD contains Genesys Management software. Genesys Skills Management is comprised of two components: Genesys Skills Assessor and Genesys Training Manager. These products have a common installer that quickly and easily installs both products.

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 other operations systems – for example CRM sales data, Learning Management System courses, and so on.

Skill assessment results exported directly from Skills Assessor can be used to optimize multi-skilling and call routing, to ensure the customer is always presented to the most knowledgeable agent available.

SkillsDNA allows users of the system to combine assessments scores with additional business KPIs to produce DNA values for each agent. KPIs and assessment scores can be weighted as they are combined to provide a more realistic overall score, allowing customers to say which KPIs and assessments are more important than others. The DNA scores can then be used to drive assignment of training and future.

Genesys Training Manager

Genesys Training Manager allows organizations to create, manage and schedule multiple agent training activity, team meetings and one to one's, automatically in WFM, controlling any performance impact.

Training Manager uses business configurable performance constraints to identify the optimum time to schedule training and / or meetings, taking into account the required resource availability.

The training scheduling process can include any combination of agent, room and trainers, with the agent availability taken directly from WFM. A training portal is provided as standard which individuals, with the exception of agents, use to keep their un-available time up to date. Training Manager takes into account this unavailable time together with their working hours to schedule in any training or meeting activity. Team meetings and One to One's are scheduled automatically,

taking into account the manager's availability.

The browser based training portal provides visibility of the scheduled training and meeting activity and includes any other details available i.e., reason for the training, which room, which trainer and any pre training work if required etc. The trainer updates attendance via their online attendance register, which they access directly through their training portal. This automatically updates Training Manager with attendance and any non-attendance for rescheduling giving visibility of how close to completion the required training activity is.

assessments and produce a more effective learning strategy. Additionally the DNA scores can be used to drive routing skills to further enhance skills based routing.

New Features in 8.5.x

Skills Assessor

Some of the primary new features added in Genesys Skills Assessor release 8.5.648 are:

- A new Universal Login system means users only need one account to access both SkillsAssessor and Training Manager Portal functionality.
- Tenant Administration is now available without being directly logged onto the server.
- Some of the core application functionality has moved from being Skills Assessor specific to being part of Skills Management core. This means its available with either an Skills Assessor or a Training Manager license.
- Portal users are now exported from Portal during the upgrade to 4.8.0. They can then be imported directly into the new combined universal login system by using a new wizard in Skills Assessor
- OrgData can now connect directly to supported WFM systems to import user and hierarchy information.
- Assessments can now have Critical questions, which must be correct for the assessment to be passed.
- Several bug fixes to improve the user experience.

Some of the primary new features added in Genesys Skills Assessor release 8.5.647 are:

- A redesign and update of the Routing Skills screen to make it easier to use.
- Several bug fixes to improve the user experience.

Some of the primary new features added in Genesys Skills Assessor release 8.5.546 are:

- The Skills Assessor user interface has been updated with a more responsive design. It can also be more heavily customised to fit with corporate branding.
- The Notifications client has been rewritten using WPF, with an improved look and feel.
- Learning Items can be linked to Assessment content and assigned (automatically or manually) based on the score achieved.
- Knowledge nudges containing multimedia can now be created and viewed.
- New Calculated KPI functionality – you can now build your own calculations for the KPIs you import directly in Skills Assessor.
- Rules Based Group Assignment capability was added. Users can be added to groups, roles, and dna roles automatically based on rules.
- Users can now be emailed to notify them of assigned learning items.
- HTTPS support can now be turned on and off via the installer.
- Assessments now have a choice of layouts for multiple answer questions.

Some of the primary new features added in Genesys Skills Assessor release

8.5.423 are:

- It is now possible for users to enter a set of objectives that can then be reviewed by their managers. This is known as the PDR feature.
- It is now possible to search for questions to add to assessment contents directly, rather than searching for contents to add. This feature is accessible by right-clicking on an existing content and selecting "Question Bank".
- The PDR service is now enhanced, with more flexibility around adding and approving objectives, a new assessment process for measuring future potential and the ability to add comments and supporting evidence to an objective.
- Skills Assessor now loads new style sheets more efficiently if they are changed, avoiding browser caching issues.
- File based evidence can now be uploaded to a PDR objective.
- Comments can now be added to a PDR objective.
- It is now possible to define one or more review periods for a PDR.
- Managers can now manage all of a user's objectives from one tab of the PDR.
- Managers can now complete assessments about a user's potential as part of the PDR process.
- Managers can now score users on a Talent Rating Screen, with the system providing recommended scores.
- Users and managers can view evidence uploaded to a PDR objective
- Managers can now submit a user's current performance against an objective.
- SkillsAssessor can now send notifications to managers when actions are required on PDR for their team.
- AICC exports are now Moodle compatible.
- Question Summary Reports can now be exported to PDF.

Additional enhancements include:

- "My Development" now refreshes when exiting an assessment, ensuring that the displayed data is up-to-date.
- The notifications client now has improved branding (including client specific version).
- The DNA installation process is simplified and the automated installer supports newer versions of SQL server.
- Notifications client installation process is simplified.
- Branding support consolidated to make OEM branding easier.
- Various minor changes to PDRs in response to customer feedback.
- PDR Talent Matrix – minor cosmetic improvements.
- The System is now FIPS(Federal Information Processing Standards) compliant from the point of view of encryption routines used for password encryption.

Training Manager

Some of the primary new features added in Genesys Training Manager release 8.5.648 are:

- There is a new Universal Login system that means users only need one account to access SkillsAssessor and Training Manager Portal functionality.
- Portal and Training Manager Rooms now have support for Exchange Integration. If a room is linked to Exchange, the exchange calendar will be considered when scheduling, and bookings will be written into the calendar. Portal calendars will also show the room's events from Exchange.
- OrgData can now connect directly to supported WFM systems to import user and hierarchy information.
- Portal users are exported from Portal during upgrade to 4.8.0. They can then be imported directly into the new combined universal login system, using a new wizard in Skills Assessor.
- Rooms can now be managed from Portal.
- OrgData can now be used on pure Azure for importing WFM data.
- New Menu System for Portal

Some of the primary new features added in Genesys Training Manager release 8.5.647 are:

- Configurable business hours in Wall Chart.
- Wall chart now includes hover over text (for browsers that support hover) with details on when the activity was last created and last modified.
- The color codes in Portal timeline are now based on the type of activity rather than the manager/trainer/room.
- Several important bug fixes to improve the user experience.

Some of the primary new features added in Genesys Training Manager release 8.5.546 are:

- There is a new resources wall chart in Portal.
- There is an added ability to request training through Portal.
- Users can now be selected for training in Portal based on WFM.
- Added ability to choose people using DNA within Planner.
- Training Manager and Training Manager Portal can now be localized.
- Training Manager and Training Manager Portal now have the ability to include lists of attendees names in calendar requests.
- Users can now schedule meetings across multiple locations.
- Training Manager can now schedule "Solo Task" meetings.
- Added Full Support for HTTPS Connections for Skills Management, including Training Manager.

Some of the primary new features added in Genesys Training Manager release 8.5.423 are:

- A new booking strategy "Minimise Coverage Disruption" is available for training and meetings. This attempts to prioritise bookings in slots that have the largest gap between Coverage and Forecast values.
- Training Manager Portal now supports another authentication mechanism where users can be authenticated via Active Directory.
- It is now possible to configure meetings to have a "transition time" which is the minimum time that Training manager will ensure occurs between sessions of the same meeting request.
- It is now possible to specify "next start" and "next end" dates for multiple meetings.
- It is now possible to "backfill" training sessions, adding users to existing sessions if schedules and coverage tolerances allow, rather than simply creating new ones.
- Training Manager now loads new style sheets more efficiently if they are changed, avoiding browser caching issues.
- Training Manager now supports database replication as a method of providing warm standby capability.
- Trainer skills can now have an associated skill level and a date on which the trainer was last trained. Skills can now be associated with training events, and additional reporting has been added around trainer skills.
- Database deployment for the primary Planner database is now handled by a configurable application which handles both database creation and upgrades.
- For meetings, the meeting location is now specified on the first tab of the meeting. This removes the need to explicitly specify the location of the meeting attendees. Existing meetings will need to be opened and have their location set before they can be scheduled again.
- Crystal Reports has been added to the Training Manager Portal as a reporting tool.

Additional enhancements include:

- It is now possible to download Outlook appointments from Training Manager Portal.

- A link has been added to the Standard View of all calendars that will, when pressed, open an appointment in the Outlook calendar.
- Training Manager can now send Outlook calendar requests. New functionality has been added to allow Training Manager to send Outlook appointments whenever a training or meeting session is published to the WFM.
- When connecting to SkillsAssessor for the purposes of mapping users and fetching assessment results, multi-tenancy is now supported.
- Available meeting sessions are now returned in the expected order when using SQL 2012.
- It is now possible when scheduling meetings on future dates from the meetings planner screen to remove any agents who have moved out of that team since the original meeting was booked. It is also possible to optionally include any agents who have moved into the team since the original meeting was booked.
- For customers using the HR link, it is now possible when scheduling meetings on future dates from the meetings planner screen to update the meeting user selection to match the HR system's view of the agents that report to the manager.
- It is now possible to optionally book exceptions for trainings and meetings over the top of other exceptions, with the caveat this will cause the impacted parts of the original exception to be permanently removed.
- The notifications client now has improved branding (including client specific version).
- The installation process is simplified and the automated installer supports newer versions of SQL server.
- Notifications client installation process is simplified.
- Branding support consolidated to make OEM branding easier.
- The System is now FIPS(Federal Information Processing Standards) compliant from the point of view of encryption routines used for password encryption.
- The meetings screen has been modified to clarify how the defined time range will be interpreted.
- Planner now opens a room calendar entry for editing when one is double-clicked.
- Performance of the manual searches has been improved when there is a large amount of data.
- Performance of the ticking and un-ticking operation on the Interruptible Activities screen has been improved.
- It is now possible to book a meeting with a single user when using the "Team Meeting" algorithm selection.
- The Training Manager server-side components now include several services. The services (including SkillsManagerWS) need to all exist in the same folder on the webserver.
- The training algorithm now prioritises location then hours worked per week when selecting trainers.
- You are now warned if you remove (or do not specify) a home location when editing a trainer's details.
- "Duplicate meetings" now allows you to select which teams the new meeting is for, and creates one per team.
- A trainer's max hours per week is now not restricted to whole hours only.
- Several confirmation dialogs have been removed.
- When exporting training sessions in CSV format, the room seats are now enclosed in quotes to prevent Excel interpreting the value as a date.
- Training sessions without rooms are now included in the training overview report.
- Several improvements to the UI for creating / editing training requests and meetings.
- You are now warned when removing a trainer skill if it has been assigned to any trainers.
- Creating a new manager in a location now assigns the manager to that location by default.

- The support URL used by the Planner client is now configurable on the server.
- It is no longer possible to set the number of places to reserve in a location for a training event to 0.
- It is no longer possible to edit the names of agents in Planner (the names are retrieved from WFM).
- Creating a new trainer in a location now assigns the trainer to that location by default.

Directories on This CD

documentation

Contains the ReadMe file, the graphics for the ReadMe, and the versions.html file.

GenesysSkillsManagement

Contains the installation and related files for the software.

Documentation

Product documentation is provided on the [Genesys Documentation Website](#), and the Documentation Library DVD that is shipped on request with your software.

In addition to an updated library of product documentation, the Genesys Customer Care website also contains product advisories that describe recently discovered issues related to Genesys products.

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Technical Support

Contacting

Genesys provides technical support to customers worldwide with through Customer Care Centers in eastern Canada, the United Kingdom, Australia, India, and Japan. You can contact Genesys Customer Care by telephone, e-mail, or on the World Wide Web. For complete information on how and when to contact Customer Care, read the [Genesys Care Support Guide for On-Premises](#). Please tell the Customer Care representative that you are a Genesys Skills Management 8.5 customer. For a list of the software versions that are on this CD, click [here](#).

Licensing

Along with its software, Genesys supplies its customers with software licenses. Licenses manifest the customers' legal rights to use the features that Genesys software provides. To obtain the necessary product licenses, you will need to complete an order form, which has detailed information to assist you in placing an order. For complete information on obtaining licenses, refer to the [Genesys Licensing Guide](#) on the Genesys Documentation website and the licensing section of the [Genesys Migration Guide](#).

Supported Operating Environment Information

Information on supported hardware and third-party software is available on the Genesys documentation website in the following documents:

- [Genesys Supported Operating Environment Reference Manual](#)
- [Genesys Supported Media Interfaces Reference Manual](#) Genesys Supported Media Interfaces Reference Manual

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Your Responsibility for Your System

You are responsible for product administration and system security. Please prevent unauthorized access. Your system administrator should read all documents provided with this product to fully understand the features available that can reduce the risk of system damage. System damage or loss caused by unauthorized access is not covered by maintenance and support or a Genesys warranty. In addition, Genesys software is proprietary. Unauthorized access may lead to violations of your confidentiality obligations under your contract with Genesys.

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