



Skills Management 9.0.0

Installation Guide for Microsoft Azure

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1 Introduction

This guide provides instructions for installing or upgrading the Genesys Skills Management suite via Microsoft Azure PowerShell deployment script.

2 Prerequisites

PowerShell for Azure must be installed on the machine being used for the deployment.

Download and install the PowerShell Command-line tools for Azure from

<https://azure.microsoft.com/en-us/downloads/> - Command-line tools, PowerShell, Windows install.

(The machine may require a restart during this process.)

The release package should be copied to the machine being used for the deployment.

3 Azure Deployment

Follow the steps below to deploy Genesys Skills Management to a Microsoft Azure account.

Start Windows PowerShell.

Browse to the Release package\Azure directory.

Login to your Azure account by entering 'Login-AzureRmAccount' and pressing enter, then entering your credentials into the login popup dialogue.

To obtain a full list of configuration parameters run the command "Get-Help .\Setup-GenesysSkillsManagementAzure.ps1 -Full".

Start the Setup-GenesysSkillsManagementAzure.ps1 script by entering '.\Setup-PerformanceDnaAzure.ps1'.

The script will prompt for the following details:

Name - Specify the name of the web application here and press Enter.

SqlDatabasePassword – Specify the password for the database user here and press Enter. You must specify a password that meets the security and complexity requirements in place on your environment.

StartIPAddress – Address of the machine you're installing from. We recommend using findmyip.org or similar service to find the machine's external IP address. This is required to open firewall ports to the Azure SQL database during the deployment process.

Tenant Administrator Username and Password - If your tenant administrator password is invalid (e.g. if it no longer meets length/complexity requirements), you will be asked to set a new password and, optionally, tenant administrator username.

When prompted to confirm whether you want to update resources, enter 'Y' and click Enter.

4 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.

5 Web Jobs

5.1 Invoker WfmHierarchy

This job is used to update the WFM Hierarchy. Note that you need to have the WFM settings configured in Training Manager.

5.2 Messaging

This is used to send email messages for things like notifications of meetings or training.

5.3 Invoker Service

This job is used for events that happen in the system such a queueing scheduling requests.

5.4 OrgData Import

This is used to pull users and hierarchy from WFM and put them into Skills Assessor. On Azure only the WFM source is available.

6 Caveats

When specifying the application name, be sure not to use the name of a web application that already exists as it will be deleted as part of the deployment process.

Crystal Reports functionality is not supported when deploying Skills Management to Microsoft Azure.

HTTPS is only supported with certain Azure accounts.

Auxiliary applications such as the DNAImport service and Learning Item auto-assignment application cannot be deployed to an Azure account.

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 have full access to the widgets of both products. Other users' access is restricted based on the widgets available to their assigned roles.

7.3 Configuring SAML authentication

Skills Assessor can be configured to use SAML authentication to authenticate users. Follow the steps below to configure the required Skills Assessor settings to enable SAML authentication.

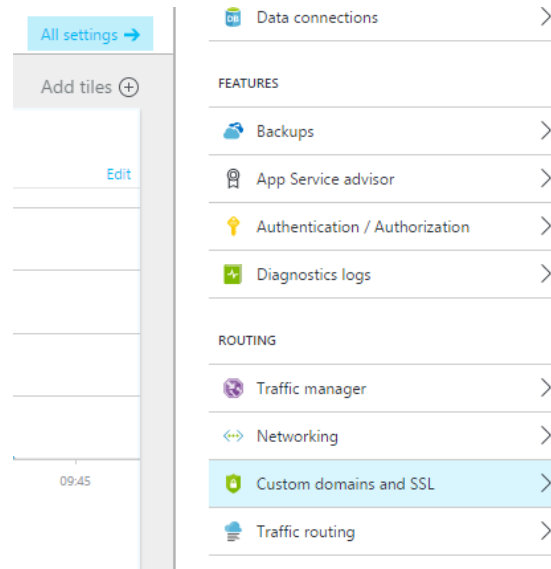
1. Login to the Skills Assessor tenant that you wish to configure for SAML authentication as a tenant administrator.
2. Click on the System Settings widget under the System section of the menu.
3. Click on the Authentication tab at the top of the page.
4. Click the '+ Add' button.
5. Complete the form with the relevant details. The Authenticating field should be set to the user field that contains the login names that are to match the SAML login requests.
6. Click the Save button.

The Authentication tab in the System Settings page lists saved SAML authentication providers. These can be edited via the edit button, deleted using the 'X' button and re-prioritised using the up and down arrows. Providers can also be enabled/disabled using the Enabled checkbox in the create/edit form.

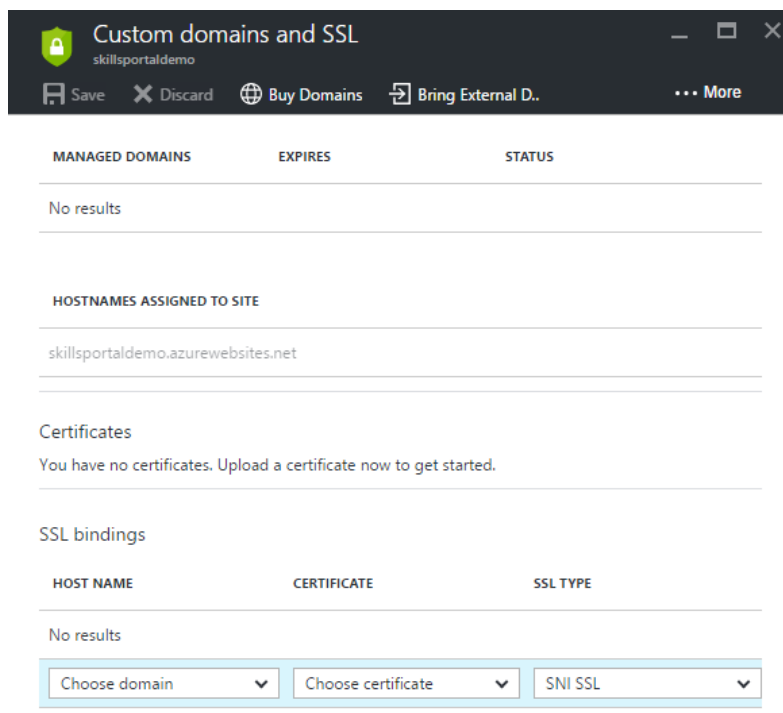
If more than one provider is present and enabled, Skills Assessor will attempt to log users in using the provider with the highest priority first. If this fails, the next provider available enabled provider will be used until the user is logged in successfully or login via all providers has failed.

8 Custom Domains

Once Skills Management has been deployed custom domains and SSL can be configured. To do this, log in to the [azure portal](#), choose “App Services” from the menu and select the Skills Management Web app. From here choose “All settings” and then “Custom domains and SSL”



This will take you to the following configuration dialog:



From here you can buy or bring external domains and import SSL certificates.

9 Optional Command Line Parameters

The following parameters can be passed into the setup script using the following format
 –‘parameter name’ ‘value’ (without apostrophes, Boolean values are \$true and \$false):

Parameter	Description	Data type	Required
Name	The name of the web site	String	✓
ResourceGroupName	The name of the resource group	String	
SqlDatabaseUserName	Username for the SQL database	String:Defaults to “slsuser”	
SqlDatabasePassword	Username for the SQL database	SecureString	
StartIPAddress	The starting address of the range of IP addresses in the SQL Azure firewall rule to allow access from the local machine.	String	✓
EndIPAddress	The last address of the range of IP addresses in the SQL Azure firewall rule	String	
PortalName	The virtual directory to use for Portal	String	
UseHttps	Whether to use HTTPS or not	Boolean	
DbPricingTier	The database pricing tier to use	String (Basic, Free, Shared, Standard, Premium)	
WebAppPricingTier	The web app pricing tier to use	String	
MsgSendEveryNMinutes	Delay in minutes between the sending of email notifications	Integer	
MsgFromAddress	From address used for sent email notifications	String	
MsgNumberOfSendAttempts	Number of email sending attempts	Integer	
MsgSubject	Subject for feedback assessment emails	String	
MsgMessageBody	Body for feedback assessment emails	String	
MsgUseDefaultCredentials	Whether to use default credentials for SMTP server	Boolean	
MsgUsername	username for SMTP server	String	
MsgPassword	password for SMTP server	SecureString	
MsgPort	port for SMTP server	Integer	
MsgUseSSL	Whether to use SSL for SMTP server	Boolean	
MsgSMTPServer	SMTP Server	String	
MsgEnableOutlookMessages	Enable outlook messages	Boolean	
MsgOutlookDefaultFrom	use default from address for email notifications	String	
MsgUseDefaultOrganizer	Use default Organizer	Boolean	
Branding	Use non-default branding (Default/Genesys/Teleopti)	String	

EnableAlwaysOn	Enable Always On for the web site. This will prevent the web site shutting down when there is no traffic. It also allows the web jobs to continue running as scheduled.	Boolean	
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Note: For passing SecureStrings to the command line parameters you will need to do the following:

```
Read-Host "Enter Password" -AsSecureString | ConvertFrom-SecureString | Out-File
"C:\Temp>Password1.txt"
```

If you are passing 2 passwords, you will need to do the above twice into different files, then do the following:

```
$pass1 = Get-Content "C:\Temp>Password1.txt" | ConvertTo-SecureString
```

Then pass these variables to the script via the command line.

You must specify a password that meets the security and complexity requirements in place on your environment. (This may help <https://msdn.microsoft.com/en-us/library/ms161959.aspx>)