GENESYS™

Skills Management 9.0.0

Optional Feature Configuration

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Document Version: 90_skillsmanagement_optional-feature_configuration__12-2017_v9.0.001.00

Contents

1 Overview 4

2 Actors Overview 5

3 Database Administrator 5

3.1.1 Installation 5
3.1.2 Support and Maintenance 5
3.1.3 Summary of Required Permissions 5

4 Enable Performance DNA Optional Feature Configuration 6

4.1 Enabling JZero LMS Learning Item Integration 6
4.2 Learning Item Auto-Assignment Application 7
4.3 Auto Rank Calculation Application 8
4.4 DNA Import Setup 9
4.4.1 Installing the DNA Import Service 9
4.4.2 Configuring the DNA Import Service 10
4.5 Configuring Performance DNA Branding 13
4.6 3rd Party Authentication 13
4.6.1 Performance DNA Configuration 13
4.6.2 Portal Configuration (via Planner) 14
4.7 Configuring Updating Routing Skills 14
4.7.1 Configuring Performance DNA to work with GIS 14

1 Overview

This document describes the key roles and permissions that are needed for the installation and ongoing maintenance of the Skills Management System. It is intended as a guide to assist teams planning the installation of the product. The different actors specified are designed to group permissions into small, logically related blocks, but there is no requirement that different actors are unique – one person could do the roles of many actors, or a team of users may be responsible for the actions of one actor. Similarly, depending on the installation requirements some of the actors may not be required.

Unless specified this document is referring to the requirements for an on-premises, or self-cloud hosted solution. If Silver Lining Solutions are providing a managed cloud deployment, then most of the actors will be provided as part of that managed service.

2 Actors Overview

In a complete installation of Skills Management, a number of different actors might be required. These following sections describes the actor and the tasks which they may need to carry out.

3 Database Administrator

3.1 Installation

Responsible for creating an account which the automated installer can use to create the necessary databases and analysis cubes for Skills Management.
Depending on organisational policies and procedures may also want to create the initial empty databases before the installer updates them

3.2 Support and Maintenance

The DBA is responsible for ensuring the databases are backed up and maintained according to the company's usual standards and policies. In a high availability environment, this might also involve monitoring failover etc.

3.3 Summary of Required Permissions

- Create databases and database users.
- Manage backups and maintenance plans.
- In high availability environments manage and monitor failover.
- Able to set up Analysis services on the SQL Server (or another server)

4 Enable Performance DNA Optional Feature Configuration

4.1 Enabling JZero LMS Learning Item Integration

Pre-requisites: DNA, a JZero LMS instance accessible from the Performance DNA web server.

The JLMS learning item integration feature allows Performance DNA administrators to assign Performance DNA assessments to JZero LMS users. These assessments can then be viewed and launched from the JLMS.

Follow the steps below to enable JLMS Learning Item integration features.

Open the **web.config** document from the **Services.LmsInterface** folder on the web server.

Locate and edit the following element to match the location of the JLMS assessment.asmx web service in your environment:

```
<endpoint address="http://***/***/jzeroskillsassess/assessment.asmx"
```

Locate and edit the following element to match the location of the Settings.svc (Services.Settings) in your environment:

```
<endpoint address="http://***/Services.Settings/Settings.svc"
```

Edit the LogPath element to the logging directory in your environment.

Login to the tenant you wish to enable JLMS features for as a tenant administrator.

Click on the **System Settings** link.

In the **User Fields** tab create a new user field to hold users' JLMS user names.

Browse to the System Settings page and select the General Settings tab.

Tick the LMS Integration Enabled option.

Set the LMS Type dropdown to Jzero.

Specify the LMS URL, the LMS Employee ID value and the LMS UserId Field in the following controls.

Click Save Changes, then click the Test LMS Settings to confirm that the connection details are correct.

Go to the Users & Hierarchy page. For each user you wish to have access to the JLMS Learning Item functionality:

1. Right click on them in the hierarchy
2. Click Edit user details
3. Select the user on the left side of the page.
4. Set a value for the JLMS login user field you created earlier. The username entered here must match a valid JLMS username in your environment.

Performance DNA is now configured to support JLMS learning items. Any users with access to the **Learning Items** page will now be able to create JLMS course learning items, associate them with DNA components and assign them to users.

4.2 Learning Item Auto-Assignment Application

Pre-requisites: DNA

The Learning Item Auto-Assignment application can be used to automatically assign recommended learning items to users based on their DNA scores. This removes the need for administrators to manually and assign learning items that fall into users' **recommended** ranges. Follow the steps below to install the application.

Double click the **LearningItemAutoAssignSetup_v.9.0.0.msi** in the release package.

Click **Next** on the Welcome to the Learning Item Auto-Assignment Setup Wizard screen.

Either leave the default installation location set or click the **Change** button to select an alternative location. Click **Next**.

In the Web Service Connections page:

Enter the URL for the Learning Item Assignment service in the first text box excluding the Service name and the last forward slash. For example, if your learning item assignment service is located at:

http://localhost/Services/Services.LearningItems/LearningItems.svc

you should enter the following into the first text box:

http://localhost/Services/Services.LearningItems

Enter the equivalent value for the DNA Data Service into the second text box.

Enter the Performance DNA tenant ID into the third text box. This can be found by opening the Performance DNA database and checking the ID of the tenant you wish to configure in the dbo.Tenants table.

The log file path text box sets the location of the application's log files. The log file path (4th text box) can either be left at its default value or an alternative folder can be selected.

Click the **Next** button.

Click the **Install** button.

Click the **Finish** button once the wizard has completed installing the application.

Once the application is installed it will be possible to start the application manually by browsing to the install location and double-clicking the **LearningItemAutoAssign_v9.0.0.exe** file. Alternatively, a scheduled task can be created on the server hosting application to run the task at a pre-defined schedule. Since the application may take some time to finish (depending on the number of users, KPIs and learning items) it is recommended that scheduled tasks running the application are set to run once per day.

4.3 Auto Rank Calculation Application

Pre-requisites: DNA

Learning items can be associated with DNA components. A priority can be assigned to the DNA component-learning item association. This priority can either be defined by admins manually or automatically by the auto rank calculation application.

The auto rank calculation application correlates learning item results (e.g. assessments) with DNA component scores. Items are ranked highly if there is a positive correlation between a learning item's scores and a subsequent improvement in the associated DNA component score. Items that have a weak or negative correlation are left un-ranked by the application.

Follow the steps below to install the application.

Double click the **AutoRankCalculationApplication_v.9.0.0.msi** in the release package.

Click **Next** on the **Welcome to the Learning Item Auto-Ranking Setup Wizard** screen.

Either leave the default installation location set or click the **Change** button to select an alternative location.

In the Web Service Connections screen enter the URL for the DNA data service and Performance DNA. Be sure to exclude the service name and last forward slash from the entered URLs, e.g.:

DNA data service: http://localhost/Services/Services.DnaData

Performance DNA: http://localhost/PerformanceDNA

Click **Install** on the **Ready to install Learning Item Auto-Ranking** screen.

Browse to the install folder and open the SilverLining.PerformanceDNA.Apps.PerformAutoRankCalculation.exe.config

Once the application is installed it will be possible to start the application manually by browsing to the install location and edit the SilverLining.PerformanceDNA.Apps.PerformAutoRankCalculation.exe.config file. Edit the logpath so that it the value is set to a folder that should be used to store the application's log files.

SilverLining.PerformanceDNA.Apps.PerformAutoRankCalculation.exe file. Alternatively, a scheduled task can be created on the server hosting application to run the task at a pre-defined schedule. Since the application may take some time to finish (depending on the number of users, KPIs and learning items) it is recommended that scheduled tasks running the application are set to run once per day.

4.4 DNA Import Setup

Pre-requisites: DNA installed and configured (users, DNA components and blocks should be present prior to setting up the DNA Import Service)

Notes:

- This application is currently not compatible with Performance DNA instances that use Active Directory (STS) authentication.
- The service must have network access to the Performance DNA web server.

The DNA Import Service allows for the automated import of KPI spreadsheets via a user-defined import folder. The service automatically processes any valid KPI spreadsheet files that are placed in the import folder. Once the files are processed they are moved from the import folder to a user-defined archive folder.

4.4.1 Installing the DNA Import Service

Double click the **DNAImportSetup_v.9.0.0.msi** in the release package.

Click **Next** on the Welcome to the **DNA Import Service Setup Wizard** screen.

On the Destination Folder screen either leave the installation location at its default value or click the **Change** button to select an alternative location.

Click **Next**.

In the **Service account** screen, you can specify whether to use an existing service account or a custom account.

Note: If you set the service to run under a custom user account then this account must have permissions to log on as a service.

Click **Next** once you have set the service/account under which the DNA Import Service will run.

Click **Install** on the **Ready to install DNA Import Service** screen.

Click **Finish** once the installation wizard has completed installing the service.

4.4.2 Configuring the DNA Import Service

Browse to the DNA Import Service installation location.

Open the **DNAImportService.exe.config** file with Notepad or similar text editor.

Locate the following element:

```
<value>http://***/PerformanceDNA/WS/ImportKpiData.asmx</value>
```

Edit the value to match the location of the PerformanceDNA/WS/ImportKpiData.asmx web service. Save the file.

Login to Performance DNA as a tenant administrator.

Click the **Import Templates** link.

Click the **New import template** button.

Set a name for the new template in the **Template Name** field.

Set the **Import Template Type** dropdown box to **DNA**.

In the **Source Description** field enter the column label for the Performance DNA username as it appears in your import spreadsheets.

Set the Source ID field to the number of the column in the spreadsheet. This value is zero-based so the first column in the spreadsheet has a Source ID of '0'.

In the 'Maps To' dropdown select the user field that is used to authenticate users, e.g. Login ID.

In the Date Field Description enter the label of the column used to store the dates of the contained KPI values.

In Date Field ID enter the number of the column in the spreadsheet that holds the dates of the contained KPI values. As before, this value is zero-based.

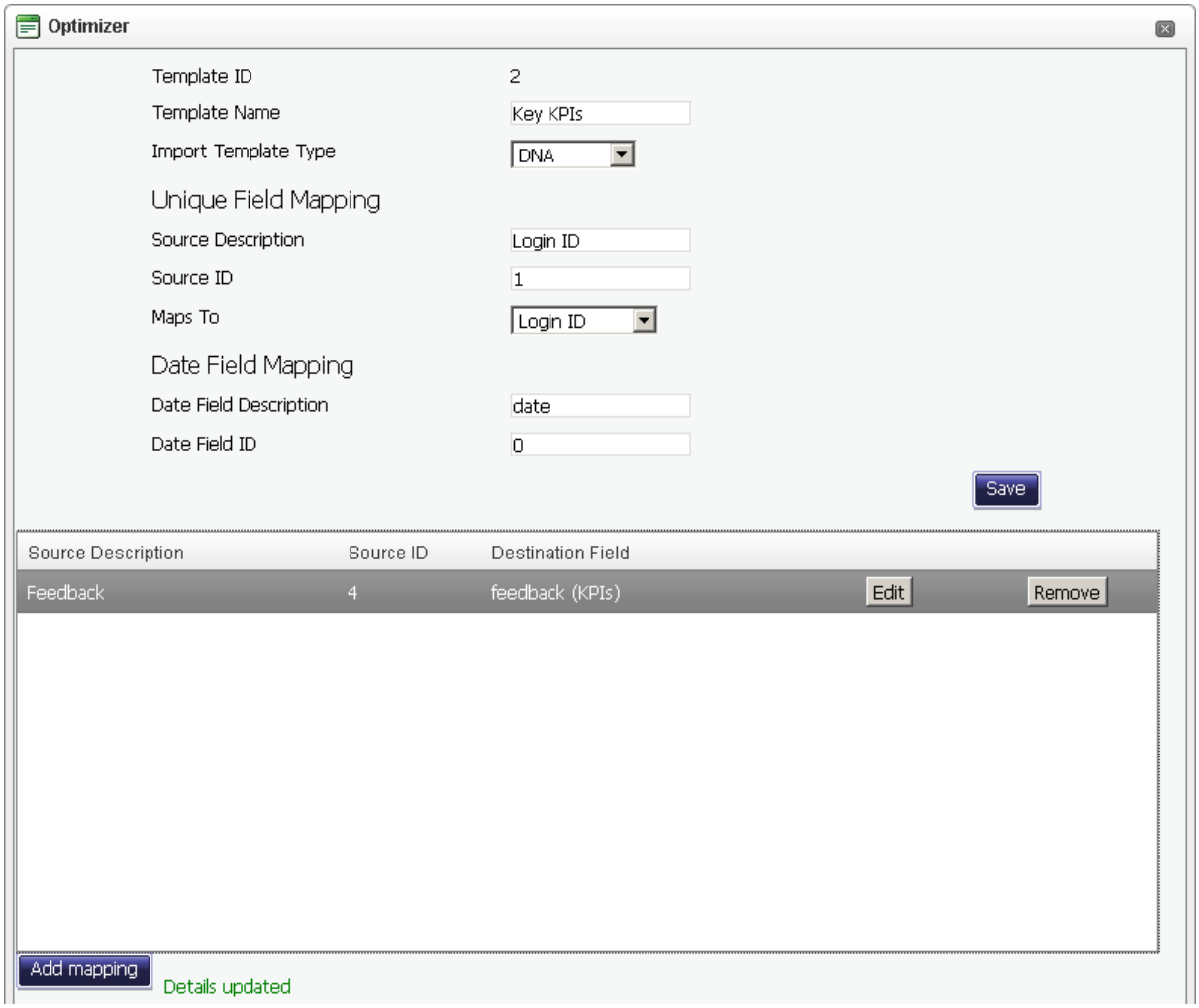
Click the **Save** button.

An additional box will appear under the form along with an **Add mapping** button.

For each column in the import spreadsheet that holds users' KPI values:

- Click the **Add mapping** button to create an association between a spreadsheet column and a KPI.
- In the **Source Description** field enter the label of the column that holds KPI value records.
- In the **Source ID** field enter the number of the column (zero-based).
- In the destination field dropdown box select the KPI which is associated with this column.

Click Savemapping can be edited and removed using the associated buttons in the mappings table.



Make a note of the **Template ID**, as displayed at the top of this page, as it is required to configure the DNA Import Service.

Open the **config.xml** file with Notepad or similar text editor.

Locate the following element:

```
<IMPORTS WebServiceURL="http://***/WS/Import/DNA.asmx"
ArchiveFilesPath="***">
```

Edit the value of the **WebServiceURL** element to match the location of the PerformanceDNA/WS/ImportKpiData.asmx service.

Set the value of the **ArchiveFilesPath** element to the location of the archive folder, e.g. “C:\archive\”. The service will move files from the import folder to the archive folder once they’ve been processed.

Locate the following element:

```
<IMPORTDETAILS Folder="***" TenantID="***" MappingTemplateID="***"
UserID="***" AuthUserName="***" AuthUserPassword="***" />
```

Set the **Folder** value to the folder you wish to use as the import folder, e.g. “C:\DNAImport\”.

Set the **TenantID** to the ID of the tenant you are configuring the service for. This can be found by opening the dbo.Tenants table in the Performance DNA database.

Set the value of the **MappingTemplateID** element to the ID of the mapping template you created earlier (as displayed at the top of the edit mapping template page).

The **UserID** element may be left at its default value.

Set the **AuthUserName** to the username of the Performance DNA user for whom the service is being configured.

Set the **AuthUserPassword** to the password of the Performance DNA user for whom the service is being configured.

Click Start -> All Programs -> Administrative Tools -> Services.

Locate the DNA Import Service in the Services (Local) list.

Right click on the service and click the **Restart** option. Changes made to the service’s DNAImportService.exe.config or config.xml file will not be applied until the service is restarted.

Ensure that the service is set to **Automatic** in the **Startup Type** column.

If the service is not set to start automatically right click on the service and click the **Properties** button.

Set the **Startup** type dropdown to **Automatic**.

Click the **OK** button.

Using Windows Explorer, browse to the folder that contains the import folder you’ve created.

Right click on the folder and click **Properties**.

Click the **Security** tab.

Click **Add**.

In the **Enter the object names to select** field enter the name of the service or domain user account that is used to run the DNA Import Service.

Click the **Check Names** button.

Click the **OK** button.

Tick the **Full Control – Allow** checkbox for the added service/domain account.

Click the **Apply** button.

Click the **OK** button.

Repeat the above process for the archive folder.

The DNA Import Service is now configured. Copying files into the import folder will cause the service to import the KPI values into the Performance DNA database and then move the file into the archive folder. The file will be renamed prior to being moved to the archive folder to prevent naming conflicts. The service produces a log of its activities which is accessible from the service's install location.

4.5 Configuring Performance DNA Branding

Performance DNA branding can be configured either via the Branding page or by using one of the existing branding presets. To modify your branding preset, open the Performance DNA Web.config file and locate the following element:

<add key="Branding" value="Default" />

The possible values for this element are: **Default**, **Genesys** and **Teleopti**.

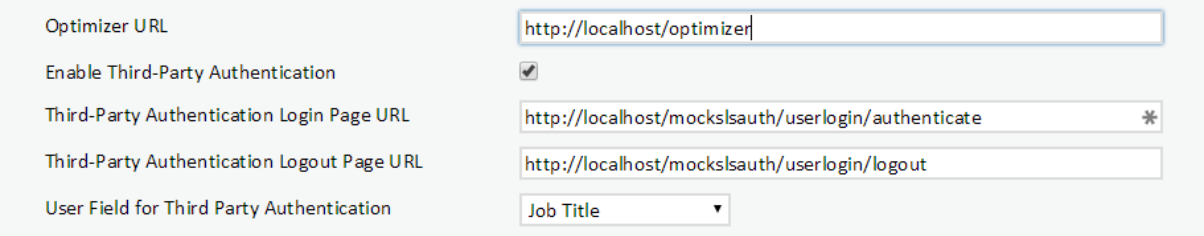
4.6 3rd Party Authentication

The latest version of Performance DNA 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.

4.6.1 Performance DNA Configuration

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



- 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 Performance DNA to use for choosing which user to login.

4.6.2 Portal Configuration (via Planner)

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

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

4.7 Configuring Updating Routing Skills

Performance DNA 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 **CSProxyService** service to retrieve and update information in CME.

4.7.1 Configuring Performance DNA to work with GIS

4.7.1.1 Required database entry

Before the configuration options for GIS will appear in Performance DNA, 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 Performance DNA Administrator guide.