GENESYS™

Genesys Skills Management Automated Install and Upgrade Guide

Additional steps required to complete an upgrade to version 9.0

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Upgrading from versions prior to 8.5 to 9.0 requires additional steps to import Training Manager users into Performance DNA. 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 Performance DNA 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, for example 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 Performance DNA 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 Performance DNA, 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. Performance DNA tenants will now be available for use again. If the Import is unsuccessful, correct your user import file and repeat the process.

Tip

- All Performance DNA 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 Performance DNA.

- When upgrading Skills Management to version 9.0 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.