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# Genesys Training Manager Knowledge Base Articles

Genesys Training Manager 9.0

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# Genesys Training Manager Knowledge Base Articles

This manual contains the following knowledge base articles:

- [Required changes to api.config in order to work through a proxy](#)
- [Making Exchange-based rooms visible to PerformanceDNA](#)
- [Crystal Report Default Value Records](#)
- [Updates to Microsoft Framework 4.6 may break Crystal Reports](#)
- [Org Data Setup](#)
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# Required changes to api.config in order to work through a proxy

<b>Software product name</b>	PerformanceDNA
<b>Version Number</b>	8.5.x and below

## Symptoms

Your company are using a proxy to connect to a hosted version of Training Manager and it won't connect.

## Resolution

If you go to the install directory .\Training Manager and find the api.config (the location of the api.config may be different depending on the install location. Copy the following:

```
<system.net>
  <defaultProxy enabled="true" useDefaultCredentials="true">
  </defaultProxy>
</system.net>
```

At the bottom of the file, inside the </configuration> tag in the SkillsPlanner.exe.config file

# Making Exchange-based rooms visible to Performance DNA

<b>Software product name</b>	Performance DNA
<b>SLS Version Number</b>	8.5.x and above

## Symptoms

You have configured Performance DNA for use with Exchange, but no rooms are appearing.

## Resolution

Start Windows PowerShell and use the following commands to create and maintain a room list within Exchange.

Use the following commands to access the Exchange server:

```
$UserCredential = Get-Credential
```

Use the following commands to set up a new session: *ChangeExampleRoomList* and *testroomX* to match the Room List and Room Names for your environment:

```
$Session = New-PSSession -ConfigurationName Microsoft.Exchange -ConnectionUri  
https://outlook.office365.com/powershell-liveid/ -Credential $UserCredential -Authentication  
Basic -AllowRedirection  
Import-PSSession $Session''
```

Room lists can be created by using the Exchange Online PowerShell cmdlet:

*New-DistributionGroup* and the *RoomList* parameter as shown below:

```
New-DistributionGroup -RoomList -Name 'ExampleRoomList' -Members  
( 'testroom1', 'testroom2', 'testroom3' )
```

### Important

According to Microsoft API restrictions, your Room List cannot exceed **100** rooms. If your business requires more than 100 training or meeting rooms, then create multiple Room Lists. However, ensure that each Room List cannot exceed 100 Rooms.

To display all the rooms in the list:

## Making Exchange-based rooms visible to Performance DNA

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```
Get-DistributionGroupMember 'ExampleRoomList'
```

To add a room to the room list:

```
Add-DistributionGroupMember -Identity 'ExampleRoomList' -Member 'testroom4'
```

To remove a room from the room list:

```
Remove-DistributionGroupMember -Identity 'ExampleRoomList' -Member 'testroom3'
```

To remove the whole room list:

```
Remove-DistributionGroup 'ExampleRoomList'
```

To end the session:

```
Get-PSSession I$ where {$_.ComputerName -eq "outlook.office365.com"} I$ Remove-PSSession
```

*Please note that the above scripts are suggested scripts, you may wish to change them or use alternatives to fit the local security policy*

# Crystal Report Default Value Records

<b>Software product name</b>	Performance DNA
<b>Version Number</b>	8.5.x and below
<b>Subject</b>	KB00004: Crystal Report Default Value Records

## Symptoms

Crystal reports sets a default value for the number of records being returned to 1000, As such this means that you are only able to report on the 1<sup>st</sup> 1000 users entered into database. Reports won't show any further users.

## Resolution

To increase the maximum number of values for a dynamic parameter list of values, set the registry key: MaxRowsetRecords, to a value greater than 1,000:

Open the Microsoft Registry Editor, and navigate to the path corresponding to the version of Crystal Reports used:

Crystal Reports 2008: HKEY\_LOCAL\_MACHINE\SOFTWARE\Business Objects\Suite 12.0\Crystal Reports\DatabaseOptions\LOV

Crystal Reports 2011: HKEY\_LOCAL\_MACHINE\SOFTWARE\SAP BusinessObjects\Suite XI 4.0\Crystal Reports\DatabaseOptions\LÖV

Crystal Reports 2013: HKEY\_LOCAL\_MACHINE\SOFTWARE\SAP BusinessObjects\Suite XI 4.0\Crystal Reports\DatabaseOptions\LÖV

Crystal Reports 2016: HKEY\_LOCAL\_MACHINE\SOFTWARE\SAP BusinessObjects\Suite XI 4.0\Crystal Reports\DatabaseOptions\LÖV

Crystal Reports for Visual Studio 2010: HKEY\_LOCAL\_MACHINE\SOFTWARE\SAP BusinessObjects\Crystal Reports for .NET Framework 4.0\Crystal Reports\DatabaseOptions\LOV

## Notes

**Add the key: LOV, if it is not present.** For 64-bit version of Microsoft Windows, the registry path will be slightly different, it will start with: HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\

But the rest of the registry path is the same.

Add the String value: **MaxRowsetRecords**

Set the value of: **MaxRowsetRecords** to the maximum number of records in the table where the values are stored. If Crystal Reports application needs to scan 100 000 records to retrieve 20 000 parameter values, set the value to 100 000.



# Updates to Microsoft Framework 4.6 may break Crystal Reports

<b>Software product name</b>	Performance DNA
<b>SLS Version Number</b>	8.5.x and above
<b>Subject</b>	Updates to Microsoft Framework 4.6 may break Crystal Reports

## Symptoms

Crystal Reports have been working on your installation, and then suddenly stop. You are unable to expand the Report Viewer tree view to access the reports.

## Cause

This issue is caused when the .Net Framework 4.6 is updated and its version number increases. The Crystal reports viewer is unable to find some files that it needs and therefore fails. (See [\[1\]](#))

## Resolution

SAP have indicated that they will release a fix for this problem in their Service Pack 16. Until that is released, there are two approaches you can take:

1. Disable .Net Framework updates on the server
2. Update the version number of the folder containing the files for Crystal reports to match the new version number of the .Net Framework. You will need to do this every time an update is installed.

# Org Data Setup

<b>Software product name</b>	Performance DNA
<b>SLS Version Number</b>	8.5.x and below
<b>Subject</b>	Org Data Setup

The aim of this document is to help complete and c during an install/upgrade.

## Install/Configuration Steps

Customer provides a list of the fields that they have in WFM plus an indication of what they want.

Examples when working Genesys:

WfmID, Firstname, Lastname, EmploymentID, PositionName, PositionID, LMPositionID, Site, Team, Email

Examples when working Teleopti:

WfmID, Firstname, Lastname, EmploymentID, PositionName, PositionID, LMPositionID, Site, Team, Email, Optional column(s)

# Lost lead zeros when importing Orgdata

<b>Software product name</b>	PerformanceDNA
<b>Version Number</b>	8.5.x and Below
<b>Subject</b>	Lost lead zeros when importing Orgdata

## Symptoms

You are using the Orgdata process to import user data and build a reporting hierarchy and find that data with a leading 0 (zero) is missing the 0(s). When checking the Orgdata process the data is correct in the Staging table however it is incorrect in the Orgdata table and Users data within the product.

## Resolution

The issue is caused by SQL server converting each value in to the most suitable data type based on the value's content. This results in numbers with leading 0s being treated as a number and the leading 0s are stripped meaning 000023 becomes 23. There are 2 possible solutions to overcome this issue:

- Add a post import SQL script to the Orgdata XML config to manually copy the data from Staging to Orgdata referencing all of the columns. The resulting Import Sources configuration would look similar to the following example:

```
<ImportSources CsvFilePath="C:\Genesys\Applications\OrgData\CurrentData"
BackupFilePath="C:\Genesys\Applications\OrgData\BackedUpData"
PostImportSql="TRUNCATE Orgdata INSERT INTO Orgdata (Id, EmployeeID, FirstName, LastName,
PositionID, PositionName, LMPositionID, CacheData, WfmUserId,
PortalEmplId,
Site,TeamManagerID) Select Id, EmployeeID, FirstName,
LastName,
PositionID,
PositionName, LMPositionID, CacheData, WfmUserId,
PortalEmplId,
Site,TeamManagerID
FROM Staging">
```

- Alternatively, similar SQL or an UPDATE query can be added to the end of the existing Post Import SQL or Stored Procedure to repopulate the data with the correct formatting.

# Teleopti Orgdata Tips

<b>Software product name</b>	PerformanceDNA
<b>Version Number</b>	8.5.x and Above
<b>Subject</b>	Teleopti Orgdata Tips

## Symptoms

- WFM users not being imported by Orgdata.
- Agents not being Placed under their Manager in the User Hierarchy
- User data missing from import

## Resolution

### WFM users not being imported by Orgdata

In order for Orgdata to pull user data from Teleopti WFM the User must be in a **Site and Team**. Due to the API calls Orgdata can only request User data based on Site and Team assignment.

### Agents not being Placed under their Manager in the User Hierarchy

There are 3 possible causes of User Hierarchy not being built correctly:

1. The LMPositionID field in Orgdata is not mapped to the WFM User field that contains the Agent's Manager's Employee ID.
2. The PositionID field in Orgdata is not mapped to the Employee ID field from WFM.
3. WFM has not had the Manager's Employee ID entered against the Agent in the correct Optional Column.

### User data missing from import

The most common cause for missing data is a mismatch in the mapping of the Orgdata fields with WFM. Most issues can be resolved by checking the field/column names in the Orgdata Config XML for spelling and formatting errors such as:

- "EmployeID" rather than "EmployeeID"
- "LeadEmploymentID" rather than "Lead Employment ID"

**When mapping Orgdata fields to WFM User data fields the field/column names must**

**match exactly. Some WFM Optional Columns may contain spaces or special characters.**

## General Tips

- Employee ID is mandatory and must be unique, if duplicates are found the Orgdata process will stop and the import will fail.
- Optional Columns can often have a rouge <space> at the beginning or end of the name causing a mapping mismatch.
- When creating the Import Template the field that maps to LoginID must contain unique values. Duplicates will cause the push of data to Competence Manager (Performance DNA) to fail.

## Sample Orgdata Config file Mapping

```
<ImportSources
CsvFilePath=""
BackupFilePath=""
PostImportSql="">
  <Source Type="Wfm" ID="1" MergeMethod="Append">
    <Mapping Field="Username" WfmField="EmployeeId" />
    <Mapping Field="EmployeeID" WfmField="EmployeeId" IsKey="true" />
    <Mapping Field="PositionID" WfmField="EmployeeId"/>
    <Mapping Field="WfmUserId" WfmField="UserId" />
    <Mapping Field="FirstName" WfmField="FirstName" />
    <Mapping Field="LastName" WfmField="LastName" />
    <Mapping Field="Email" WfmField="Email" />
    <Mapping Field="LMPositionID" WfmField="Team Manager ID" />
    <Mapping Field="Site" WfmField="Site" />
    <Mapping Field="Team" WfmField="Team" />
    <Mapping Field="TrainingPlannerRole" WfmField="Training Planner Role" />
  </Source>
</ImportSources>
```

# Nice IEX Orgdata Tips

<b>Software product name</b>	Skills Mangement
<b>Version Number</b>	8.5.x and Above
<b>Subject</b>	Nice IEX Orgdata Tips

## Symptoms

- WFM users not being imported by Orgdata.
- Agents not being Placed under their Manager in the User Hierarchy
- User data missing from import

## Resolution

### WFM users not being imported by Orgdata

In order for Orgdata to pull user data from NICE IEX WFM the User must have the following Agent Data Groups (ADGs) or Agent Data Values (ADV's) if these are missing or not unique Orgdata may see the User as invalid and remove them from the import:

- Skills Manager Role
  - This is a custom ADG that is used to identify Users that are Trainers, Managers or Agents
- Managers ID
  - This ADG is used to store the User's Line Manager's Employee ID. We use this to map Users to their Manager when creating the reporting hierarchy.
- EmployeeID
  - This should be populated and unique as it is typically used as a key field when mapping Users within the system.
- MU Name
  - MU Name can be collated as a standard Orgdata field. This can be very useful when filtering the Users to be imported as custom scripts can be used to remove specific MU's from the import data.

### Agents not being Placed under their Manager in the User Hierarchy

There are 3 possible causes of User Hierarchy not being built correctly:

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1. The LMPositionID field in Orgdata is not mapped to the WFM User field that contains the Agent's Manager's Employee ID.
2. The PositionID field in Orgdata is not mapped to a field that contains a unique value.
3. WFM has not had the Manager's Employee ID entered against the Agent in the correct ADG.

## User data missing from import

The most common cause for missing data is a mismatch in the mapping of the Orgdata fields with WFM. Most issues can be resolved by checking the field/column names in the Orgdata Config XML for spelling and formatting errors such as:

- "EmployeID" rather than "EmployeeID"
- "LeadEmploymentID" rather than "Lead Employment ID"

**When mapping Orgdata fields to WFM User data fields the field/column names must match exactly. Some WFM ADGs may contain spaces or special characters.**

## General Tips

- Employee ID is mandatory and must be unique, if duplicates are found the Orgdata process will stop and the import will fail.
- ADG can often have a rouge <space> at the beginning or end of the name causing a mapping mismatch.
- When creating the Import Template the field that maps to LoginID must contain unique values. Duplicates will cause the push of data to Performance DNA to fail.

## Sample Orgdata Config file Mapping

```
<ImportSources
CsvFilePath=""
BackupFilePath=""
PostImportSql="">
  <Source Type="Wfm" ID="1" MergeMethod="Append">
    <Mapping Field="Username" WfmField="EmployeeId" />
    <Mapping Field="EmployeeID" WfmField="EmployeeId" IsKey="true" />
    <Mapping Field="PositionID" WfmField="EmployeeId"/>
    <Mapping Field="WfmUserId" WfmField="UserId" />
    <Mapping Field="FirstName" WfmField="FirstName" />
    <Mapping Field="LastName" WfmField="LastName" />
    <Mapping Field="Email" WfmField="Email" />
    <Mapping Field="LMPositionID" WfmField="Team Manager ID" />
    <Mapping Field="Site" WfmField="Site" />
    <Mapping Field="Team" WfmField="Team" />
    <Mapping Field="TrainingPlannerRole" WfmField="Training Planner Role" />
  </Source>
</ImportSources>
```

# Changing Service Account Password

<b>Software product name</b>	Skills Mangement
<b>Version Number</b>	8.5.x and Above
<b>Subject</b>	Changing Service Account Password

## Symptoms

- Web Service errors when logging into the websites
- 401 Authentication errors when connecting to Exchange
- Unable to validate security certificates

## Resolution

### Web Service errors when logging into the websites

- Open Internet Information Services (IIS),
  - Navigate to the Application Pools.
  - Right click on the Application Pool and select Advance Settings
    - Click on the ... next to the username listed under Identity to change the user details
- repeat for all of the Skills Management Application Pools

### 401 Authentication errors when connecting to Exchange

- Log into Performance DNA / Training Manager Portal as an Administrator
- Navigate to Systems Settings
  - On the General tab update the account details used for the Exchange integration.
  - Click Test Exchange Settings to validate the new credentials
- Click Save at the bottom of the page

If the Exchange / Outlook account has changed the Config file for the Email Messaging application may also need updating.



### Unable to validate security certificates

This issue is generally caused by the login / Security services having incorrect user details and is resolved by updating the Application Pool user details.

### Other credentials to check

The Windows server Invoker Service may also require a password update.

- Open the Services Window and locate the Invoker Service.
- Right click and select Properties
- In the Logon tab enter the updated user details.

### Scheduled Tasks

- Open the Task Scheduler application.
- Open the Task Library and locate the schedule tasks
- Right click and select properties
- Update the Security Options with the new user details.

Repeat for all Skills Management tasks.