

TASKE Call Center Management Tools

Version 8

Installation and Configuration Guide

*Reporting, Monitoring, and Analysis Solutions for the
IWATSU ADIX Telephone System*

TASKE Technology Inc.

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Installing the TASKE Call Center Management Tools

This manual provides instruction for performing a complete installation and configuration of the TASKE Call Center Management Tools. Included are procedures for preparing the telephone system to communicate with TASKE as well as instruction on outfitting your server PC with the proper hardware and software.

Telephone system and PC preparations must precede software installations of the TASKE Call Center Management Tools. Once these preparations are complete, proceed to the installation instructions for the various TASKE products. These products include:

ACD ToolBox – the core application suite offered by TASKE. This suite includes the following applications:

Information Server – the server component of the ACD ToolBox. This application resides on the TASKE server PC and interfaces with the telephone system data stream. This interface allows the Information Server to provide real-time information to other TASKE applications and store telephone system data for reporting purposes.

ACD Monitor – a real-time monitoring application that interfaces with the Information Server to provide detailed information on agent, queue, and traffic activity within the contact center.

Reports – a reporting application that provides over 150 detailed reports on contact center resources, agents, queues, and activity.

Administrator – an application that manages the TASKE database and data files.

Traffic Analyzer – an application that analyzes call traffic and aids in the proper allocation of contact center resources.

Search – an application that performs searches on raw telephone system data, making it easy to find specific call records within the thousands received in a single day.

WallSign – an application that drives reader board messaging within the contact center. This application consists of two components, the WallSign Administrator and the WallSign Server.

WallSign Administrator – create plans for playing reader board messages based on time of day, day of week, and contact center conditions.

WallSign Server – uses plans created in WallSign Administrator and interfaces with the Information Server to determine which messages to play on the Spectrum® reader boards.

Voice ToolBox – an application that drives voice messaging to callers waiting in queue. This application consists of two components, the Voice ToolBox Administrator and Voice ToolBox Server.

Voice ToolBox Administrator – create plans for playing messages to callers waiting in queue based on time of day, day of week, and contact center conditions.

Voice ToolBox Server – uses the plans created in Voice ToolBox Administrator and interfaces with the Information Server to determine which messages to play to callers in queue.

Agent Desktop – an application that typically resides on an agent station, providing agents with real-time statistics on call traffic and queue activity.

The TASKE Environment

The ACD ToolBox is installed in a networked, client-server configuration. In this configuration, the TASKE system is comprised of a network server, one or more supervisor stations, and optionally, one or more agent stations. With the addition of enterprise licensing, the environment may expand to include additional servers that are located at remote sites and enterprise supervisor stations.

TASKE Server – the TASKE server is a PC connected to the telephone system. All server-based TASKE applications reside on the server along with the supervisor applications. The ACD Collector, a function of the Information Server application, collects raw telephone system data, stores it, and shares it with other TASKE applications. Users of the TASKE server have system administration, database administration, monitoring, reporting, and chat abilities. If the Voice ToolBox and WallSign are installed, users also have server and administrative abilities for both applications.

TASKE Supervisor Station – a TASKE supervisor station is a PC that receives and stores real-time telephone system data through a network connection to the Information Server. Users of supervisor stations have database administration, monitoring, reporting, and chat abilities. If the Voice Administrator and WallSign Administrator are installed, users also have administrative abilities for both applications.

TASKE Enterprise Supervisor Station – a TASKE enterprise supervisor station is a supervisor station with enterprise licensing. This means that the enterprise supervisor station has the same abilities of the supervisor station, but is also able to perform real-time monitoring and produce reports for remote sites. This is accomplished through a TCP/IP connection to the Information Server at the remote site.

TASKE Agent Station – a TASKE agent station is a PC that receives real-time PBX data through a network connection to the Information Server. Users of agent stations only have access to the optional Agent Desktop real-time monitoring application and its chat feature.

Hardware and Software Requirements

Please refer to the following tables when determining the requirements for your server and client PCs.

TASKE ACD ToolBox – Server	
Required Software	<ul style="list-style-type: none"> Windows 98* 2nd Edition, Windows ME*, Windows 2000, or Windows NT Server or Workstation 4.0 with Service Pack 6 * Note: Windows 2000 and Windows NT are the recommended operating systems. Microsoft Internet Explorer 5.5 or later (required for Online Help)
Processor	Pentium III, 500 MHz
Memory	128 MB
Video	800x600, 256 colors
Disk Drive	6.0 GB
Drives	3.5" FDD, 4X CD-ROM (for installation)
I/O Ports	Parallel or USB port for hardware lock, one serial port for data collection
Mouse	Required
Network Interface Card	Fast Ethernet (100 Mbps)
Sound Card	SoundBlaster or compatible

TASKE ACD ToolBox – Client	
Required Software	<ul style="list-style-type: none"> Windows 98 2nd Edition, Windows ME, Windows 2000, or Windows NT 4.0 with Service Pack 6 Microsoft Internet Explorer 5.5 or later (required for Online Help)
Processor	Pentium II, 300 MHz
Memory	64 MB
Video	800x600, 256 colors
Disk Drive	2.0 GB
Mouse	Required
Network Interface Card	Fast Ethernet (100 Mbps)
Sound Card	SoundBlaster or compatible

TASKE Voice ToolBox – Server	
Required Software	<ul style="list-style-type: none"> Windows 2000 or Windows NT 4.0 with Service Pack 6 Microsoft Internet Explorer 5.5 or later (required for Online Help) Dialogic® DNA 3.3 Drivers
Processor	Pentium III, 500 MHz
Memory	128 MB
Video	800x600, 256 colors
Disk Drive	6.0 GB
Drive	4X CD-ROM (for installation)
Mouse	Required
Network Interface Card	Fast Ethernet (100 Mbps)
Voice Card	Dialogic D/41D, D/41H, Dialog/4, D/160SC-LS, D/4PCI, or D/41E
Expansion Slots	Up to 4 PCI/ISA slots (for Dialogic boards)
Backup Power Supply	UPS (for Voice Server only) is recommended
Sound Card	SoundBlaster or compatible

TASKE Voice ToolBox – Client	
Required Software	<ul style="list-style-type: none"> Windows 98 2nd Edition, Windows ME, Windows 2000, or Windows NT 4.0 with Service Pack 6 Microsoft Internet Explorer 5.5 or later (required for Online Help)
Processor	Pentium II, 300 MHz
Memory	64 MB
Video	800x600, 256 colors
Disk Drive	2.0 GB
Mouse	Required
Network Interface Card	Fast Ethernet (100 Mbps)
Sound Card	SoundBlaster or compatible

TASKE WallSign – Server	
Required Software	<ul style="list-style-type: none"> Windows 98 2nd Edition, Windows ME, Windows 2000, or Windows NT 4.0 with Service Pack 6 Microsoft Internet Explorer 5.5 or later (required for Online Help)
Processor	Pentium II, 300 MHz
Memory	64 MB
Video	800x600, 256 colors
Disk Drive	2.0 GB
Drive	4X CD ROM
I/O Port	RS-232 serial port for reader board
Mouse	Required
Network Interface Card	Fast Ethernet (100 Mbps)
Reader Board	Spectrum®

Preparing your Server PC

Before installing the TASKE Call Center Management Tools on your server PC, it is imperative that the PC is setup properly. Please use the following table to verify that the server PC is prepared to function properly with the telephone system and other PCs in the network.

Action	Description
Verify the PC operating system complies with the minimum operating system requirements for a TASKE server PC as described in the <i>Hardware and Software Requirements</i> section of this manual.	Ensure the following services are installed with the operating system: <ul style="list-style-type: none"> • Client for Microsoft Networks • TCP/IP network protocol services <p>Note: if the operating system is Windows NT 4.0, install all motherboard drivers.</p>
Verify the PC meets all minimum requirements for the intended installation types.	Please refer to the <i>Hardware and Software Requirements for Server and Client Stations</i> section of this manual.
Verify the assignment of a static IP address to the PC.	TASKE Server PCs require static IP addresses. This is because the client applications need to know how to find the server PC in order to establish a connection. <p>Note: avoid changing this IP address after the installation and do not use the local host address of 127.0.0.1.</p>
Verify a Windows user account exists on the PC with local administrator rights.	The local administrator account is required to perform the TASKE installation.
If installing the Voice ToolBox, verify the Dialogic voice card(s) are installed in the PC and the required number of ports is available.	The analog ports of the telephone system are connected to the TASKE server through the voice ports of the Dialogic voice cards. <p>Note: refer to <i>Appendix B – Server PC Hardware Installation and Configuration</i>.</p>
Verify the software lock is readily available.	The software lock is a connector that attaches to a port on the server PC. The lock may be a parallel connector or it may be a USB connector. <p>Note: refer to <i>Appendix B – Server PC Hardware Installation and Configuration</i>.</p>

Network Considerations

The TASKE ACD ToolBox supports two types of networking software: Microsoft® networking (recommended) and Novell® Netware®. The installation procedures in this guide assume the contact center is running in a Microsoft networking environment.

Communicating with TCP/IP

Transport Control Protocol / Internet Protocol (TCP/IP) is an Internet traffic protocol that uses an addressing system (IP addresses) to connect PCs over local area networks (LANs) and wide area networks (WANs). TASKE Technology uses this system to establish communication between server and client PCs and to establish Enterprise connections.

The installation procedures in this guide assume that TCP/IP is installed, configured, and working properly on all PCs in the TASKE network — the TASKE ACD ToolBox uses port numbers 5210, 5211, and 5212 to communicate with other TASKE programs. Please verify that none of these ports are being used on the network.

To test the operation of TCP/IP and ensure that it is working properly, try the following:

- At each of the PCs running ACD ToolBox, 'ping 127.0.0.1', which is the local host address (referring to the PC currently in use). If this doesn't work, reinstall and configure the local TCP/IP stack.
- At each PC having a network connection to the TASKE Server, ping the TASKE Server. If this works, TCP/IP should be working properly.

Establishing Static IP Addresses for TASKE Servers

An IP address is a method for naming PCs through TCP/IP. All PCs in the network require an unique IP address. This allows each PC to have its own identity in the network.

IP addresses can be static, meaning that they never change, or assigned arbitrarily every time a PC connects to the network. For networks not connected to the Internet, users can assign any IP address to any PC, assuming no IP addresses within the network are duplicated. For networks connected to the Internet, the random assignment of IP addresses will not work. Internet connected networks must be assigned a range of IP addresses by an organization called InterNIC. This organization ensures that IP addresses across the Internet are never duplicated.

TASKE Server PCs require static IP addresses. This is because the client applications need to know how to find the Server PC in order to establish a connection. Static IP addresses for the client PCs are recommended, but not

required. This is because the client applications provide the IP address of the client PC to the Server PC upon connection.

For information on how to setup TCP/IP and assign IP addresses in a Windows-based environment, consult the TCP/IP topics in the Microsoft Windows Online Help.

TASKE Software Lock and Licensing

The software described in this guide is provided under a license agreement with TASKE Technology, Inc. The software may be used and distributed only in accordance with the terms of the license agreement. Two licensing components are required to install and run the ACD ToolBox. These are the site license file and the software lock.

The site license file is included on a 3.5" floppy disk provided with the package received from TASKE Technology, or it will be received via email. This file is required during the server installation.

The software lock is a connector that attaches to a port on the server PC. The lock may be a parallel connector, meaning it connects to the parallel port of the PC, or it may be a USB connector, meaning it connects to an USB port on the PC. The lock must be connected to the server PC at all times. If the lock is not connected to the server PC, none of the applications in the ACD ToolBox will run.

Refer to *Appendix B – Server PC Hardware Installation and Configuration* for instruction on installing parallel port and USB port versions the software lock.

Software Lock Driver Software

A driver must be installed in order for TASKE to communicate with the software lock. The software lock driver installation program runs during the TASKE server installation process. For information and instruction on the installation of the software lock drivers, refer to *Sentinel System Driver Installation* section of this document.

Software License Files

The TASKE ACD ToolBox checks for the presence of two software license files that work in conjunction with the software lock to regulate the use of TASKE software. The two files are called **TASKELCK.INI** and **TASKELCK.LIS**. The contents of these license files and the identification number that is programmed into the software lock determine the software features and functions available to the site via the TASKE ACD ToolBox.

License files are shipped on the Administration disk or provided via email. During installation users are prompted for the location of these license files. The default path to the license files is a:\, with the assumption that the a:\ drive is the floppy disk drive. However, if the license files are located elsewhere, the path to these files must be identified. Once the path is identified, the license files are saved to the TASKE installation directory of the server PC.

Preparing for the TASKE Server Installation

This section describes installation procedures for installing the TASKE Call Center Management Tools on the TASKE server. The TASKE software can be installed from the TASKE Call Center Management Tools CD-ROM or from files that have been downloaded from the TASKE web site.

Pre-Installation Check List

To ensure a successful installation, it is important to be prepared and have the necessary tools readily available. The following list outlines the items that need to be checked and the tools that need to be on hand prior to the server installation.

Application Shutdown – prior to performing the server installation, ensure that all applications running on the PC are shut down. If this is an upgrade, the Information Server must be completely shut down and data collection stopped before beginning.

Local Administrative Rights – the user installing the TASKE Call Center Management Tools must have administrative privileges on the PC. Please log in either as the *local administrator* or using a *domain account with local administrative rights* prior to beginning the installation.

Installation CD-ROM or Files – locate the TASKE Call Center Management Tools CD-ROM or decompressed installation files from the TASKE web site.

Administration Disk – it is not possible to install TASKE applications without the site licensing information. The TASKE site license is provided on the Administration disk. This is a 3.5" floppy disk that is included in the package received from TASKE Technology. If the site license is provided in an email, download the file to the PC or to a floppy disk. The path to the license file will be required during the installation process.

Software Lock – the TASKE software lock is a connector that attaches to the server PC. Depending on the connector type, it will be a USB connector that connects to a spare USB port on the server PC or it will be a parallel port connector that attaches to the parallel port of the server PC. You will need to

attach the lock to the server PC after the installation is complete, please ensure you have the lock ready.

Installation of Microsoft Internet Explorer 5.5 or Greater – Internet Explorer 5.5 or greater must be installed prior to performing the TASKE installation. This application is required for using the Microsoft Scheduled Tasks application and for viewing the TASKE Online Help. The application is provided for installation on the TASKE Call Center Management Tools CD and is available for download from the Microsoft web site.

To locate the setup program for Internet Explorer 5.5 on the TASKE Call Center Management Tools CD, click the *Install Utilities* button on the CD browser. This opens the *Install Utilities* window. Click the *Microsoft® Internet Explorer 5.5* button to launch the setup program.

To determine the version of Internet Explorer that is currently on the PC, open Internet Explorer and select *About Internet Explorer* from the *Help* menu. The *About Internet Explorer* dialog opens, indicating the installed version of the software.

Readme.txt – the readme.txt file on the CD-ROM contains important, last minute information about the ACD ToolBox. Before starting the installation procedure, please review the readme.txt file using a text editor.

Understanding Directory Creation and Sharing During Installation

During the installation process, the setup wizard needs to create and share several directories across the network. It is imperative that these directories are both created and shared. This allows enterprise supervisor, supervisor, and agent stations to connect to the directories and retrieve site information. The directories that must be created and shared for information transfer across the network are:

- SiteData (stores all the telephone system data, summaries, and database for the ACD Toolbox Server)
- SignData (stores the database for the WallSign Server)
- VoiceData (stores the database and sound files for the Voice Server).
- Setups (stores all files required to perform a network client installation)

It is important to note that all of these directories may not exist. The SignData and VoiceData directories only exist if the Voice ToolBox and WallSign applications are installed on the server.

Launching the Setup Wizard

Use the following steps to launch the setup wizard from the TASKE Call Center Management Tools CD:

1. Insert the TASKE Call Center Management Tools CD into the CD-ROM drive of the PC. The CD runs automatically. If the CD fails to run automatically, browse the CD and double-click *SETUP.EXE*.
2. Click the *Install TASKE Products* button to open the *Install* window.
3. Click the *IWATSU® ADIX* button to launch the setup wizard.

If you have downloaded the TASKE Call Center Management Tools from the TASKE website, use the following steps to launch the setup wizard from the decompressed files:

1. Using Windows Explorer, open the *Disk1* directory. This directory contains the decompressed files for the TASKE Call Center Management Tools.
2. Double-click *SETUP.EXE* in the *Disk1* directory to launch the setup wizard.

Why the Setup Wizard May Fail to Launch

If the setup wizard fails to launch, it is because the server PC is not equipped with one or more of the required components. The following errors may occur and prevent the launch of the setup wizard:

Incorrect version of Internet Explorer – if the server PC is not equipped with Microsoft Internet Explorer 5.5 or greater, the *Error* dialog box opens indicating that Microsoft Internet Explorer 5.5 or greater is required. Microsoft Internet Explorer is provided on the TASKE Call Center Management Tools CD

If Internet Explorer 4.0 or less is installed on the PC, the installation will be stopped and Internet Explorer 5.5 must be installed prior to attempting the installation again.

If the PC is already equipped with Internet Explorer 5.0 or greater, click *OK* to proceed. The installation of the ACD ToolBox may proceed, but Internet Explorer 5.5 must be installed immediately following the installation.

Incorrect version of MFC24.DLL (Windows NT 4.0 Users Only) – when a user launches the setup wizard the setup program searches the PC for the desired version of MFC42.DLL. If the appropriate version is not installed on the PC, the setup wizard will not be launched. Proceed to the *Install Utilities* section of the CD browser and perform the installation of this utility before attempting to launch the setup wizard again.

Using the Setup Wizard

The setup wizard guides users through the installation process. The intuitive design of the interface aids in the completion of quick and error-free installations.

Each window in the setup wizard contains some of the following buttons:

Back – use the *Back* button to return to the previous window. This button is disabled on the first window.

Next – use the *Next* button to proceed to the next window in the setup wizard. In the last window of the setup wizard this button changes to Finish.

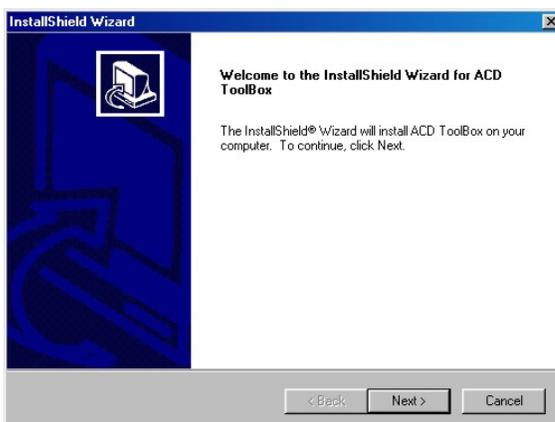
Cancel – use the *Cancel* button to exit the setup wizard and terminate the installation.

Yes – this button appears only on the *License Agreement* window. Click the Yes button to agree to the terms of the TASKE Technology software license and proceed to the next window.

No – this button appears only on the *License Agreement* window. Click the No button to disagree to the terms of the TASKE Technology software license. Clicking the *No* button terminates the installation.

Browse – this button appears only on windows where the user may need to browse the directories of the local PC or network.

View – this button appears only on the *Locate License Files* window. Click the View button after specifying the location of the TASKE license file to view the contents of the license.



For first time installations, the startup window is titled *Welcome to the InstallShield Wizard for ACD ToolBox*. This window introduces users to the ACD ToolBox installation. Click *Next* to proceed with the installation of the ACD ToolBox.

If a previous version of the TASKE Call Center Management Tools resides on the PC, a dialog box opens indicating that the previous version exists. Click

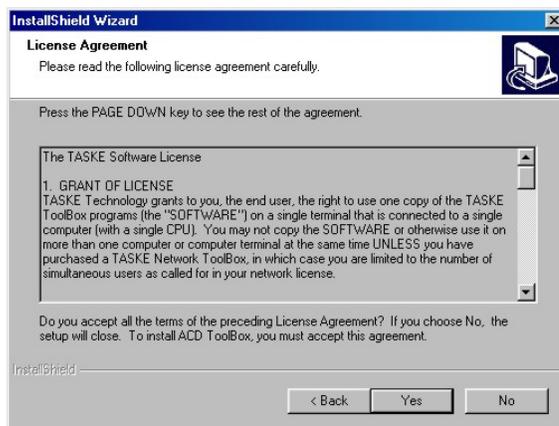
OK to continue with the upgrade, or click *Cancel* to terminate the upgrade. Clicking *OK* immediately starts the upgrade of the installed components.

Step-by-step Instructions for a Successful Server Installation

Use the following steps to complete the server and supervisor installations of the ACD ToolBox on the TASKE server PC.

When the ✓ symbol appears in the following steps, it indicates the recommended method of performing the procedure in a step.

1. Click *Next* in the *Welcome to the InstallShield Wizard for ACD ToolBox* to continue to the *License Agreement* window.



2. Click *Yes* to agree to the terms of the TASKE Technology software license and proceed to the *Choose Destination Location* window.
3. Use the *Choose Destination Directory* window to select the directory where the ACD ToolBox applications and files will reside. This window provides users with a choice of selecting the default destination directory or selecting another directory.

✓ **Selecting the Default Destination Directory**

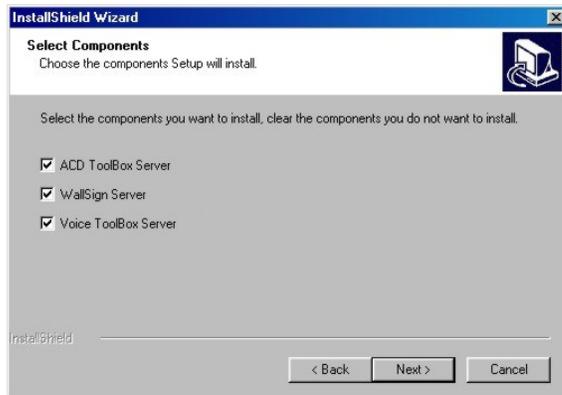
Click *Next* to accept the destination directory of `c:\TASKE 8` and proceed to the *Select Components* window.

OR

Selecting an Alternate Destination Directory

Click *Browse* to open the *Choose Folder* dialog box. Use this dialog box to browse for another destination directory. Click *Next* after selecting a destination directory and proceed to the *Select Components* window.

4. Enable the check boxes of the components to install from the *Select Components* window. A minimum of one component must be selected for installation.



The components available for selection are:

ACD ToolBox Server – installs the server components of the ACD ToolBox.

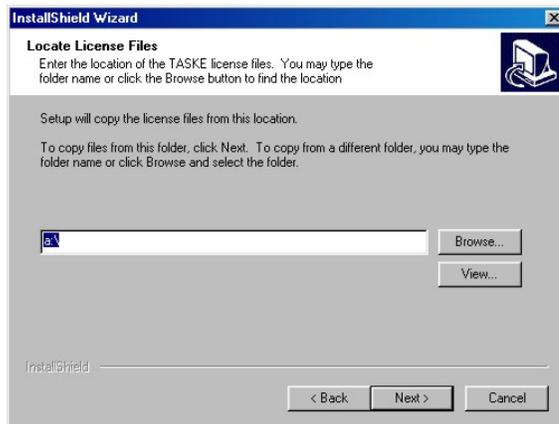
WallSign Server – installs the WallSign Server application.

Voice ToolBox Server – installs the Voice ToolBox Server application.

Click *Next* when the desired components are selected to proceed to the *Locate License Files* window.

If the Voice ToolBox Server component is enabled, the *Error* dialog box opens indicating that the Voice ToolBox requires *version 3.1 DNA or greater* of the *Dialogic drivers*. These drivers are located on the TASKE Call Center Management Tools CD. Click OK to continue. Install the appropriate Dialogic drivers when the installation is complete.

5. Use the *Locate License Files* window to identify the path to the license files. Typically the license files are located on the Administration disk, a 3.5" floppy disk provided by TASKE Technology. Alternatively, the license files may have been provided via email and may be located in a user-selected location on the PC.



Selecting the Default License File Location

Place the Administration disk in the floppy drive of the PC. Click *Next* to accept the default license file location of *a:* and proceed to the *Choose the Site Data Destination Location* window.

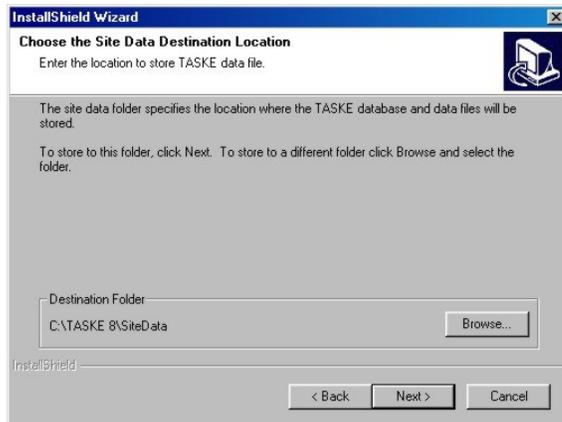
OR

Selecting an Alternate License File Location

Click *Browse* to open the *Choose Folder* dialog box. Use this dialog box to browse the PC for the *Taskelck.ini* file. Select the file and click *Next* to proceed to the *Choose the Site Data Destination Location* window.

After identifying the location of the license file, and before clicking the *Next* button, click the *View* button to display the contents of the license file in *Notepad*.

6. Use the *Choose the Site Data Destination Location* window to select the directory where the TASKE database and data files will reside. This window provides users with a choice of selecting the default site data location or selecting another location.



✓ **Selecting the Default Site Data Destination Location**

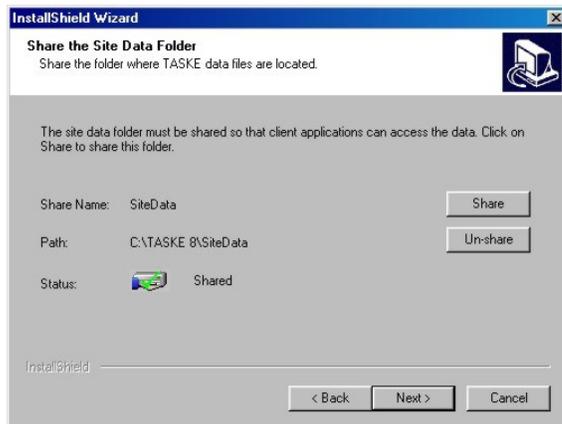
Click *Next* to accept the default site data destination directory of *c:\TASKE 8\SiteData* and proceed to the *Share the Site Data Folder* window.

OR

Selecting an Alternate Site Data Destination Location

Click *Browse* to open the *Choose Folder* dialog box. Use this dialog box to browse for another site data destination directory. Ideally this directory should reside within the destination directory that was created in step 3. This is the directory where the ACD ToolBox applications and files reside. Click *Next* after selecting a site data destination directory and proceed to the *Share the Site Data Folder* window.

7. Use the *Share the Site Data Folder* window to share the *SiteData* folder across the network. Sharing this directory allows Enterprise, supervisor, and agent stations to connect to the directory and retrieve site information. This window indicates the share name for the directory, the path to the directory, and the shared status of the directory.



✓ Share the SiteData Folder

Click the *Share* button to share the *SiteData* directory across the network. If the *SiteData* directory does not exist already, the *Confirm New Folder* dialog box opens requiring the user to confirm the creation of the *SiteData* folder. Click *Yes* in this dialog box to create the *SiteData* folder.

View the *Status* field in the *Share the Site Data Folder* window to confirm that the directory is shared. Click *Next* to accept the sharing of the directory and proceed to the next window.

OR

Do Not Share the SiteData Folder

Click the *Un-share* button to disable the sharing of the *SiteData* directory. This is not recommended, as this directory must be shared to allow client applications to retrieve site information from the server.

View the *Status* field in the *Share the Site Data Folder* window to confirm that the directory is not shared. Click *Next* to proceed to the next window. The *Question* dialog box opens requiring the user confirm that the directory should not be shared. Click *Yes* to continue without sharing or click *No* to return to the *Share the Site Data Folder* window and share the folder.

The windows that open next depend upon whether the *WallSign Server* and the *Voice ToolBox Server* were selected for installation in the *Select Components* window. The list below outlines the possible order of windows, based on the components selected for installation.

WallSign Server Selected for Installation

1. Choose the WallSign Data Destination Location
2. Share the WallSign Data
3. WallSign Server Settings

If the WallSign Server is not selected for installation these windows do not appear in the setup wizard. The setup wizard continues to the Voice ToolBox Server setup windows if the Voice ToolBox Server is selected for installation.

Voice ToolBox Server Selected for Installation

1. Choose the Voice ToolBox Destination Location
2. Share the Voice ToolBox Data

If the Voice ToolBox Server is not selected for installation these windows do not appear in the setup wizard. The setup wizard continues to the “Server Network Settings” window.

8. Use the *Choose the WallSign Data Destination Location* window to select the directory where the WallSign data files will reside. This window provides users with a choice of selecting the default sign data location or selecting another location.

✓ Selecting the Default WallSign Data Destination Location

Click *Next* to accept the default sign data destination directory of *c:\TASKE 8\SignData* and proceed to the *Share the WallSign Data* window.

OR

Selecting an Alternate WallSign Data Destination Location

Click *Browse* to open the *Choose Folder* dialog box. Use this dialog box to browse for another sign data destination directory. Ideally this directory should reside within the destination directory that was created in step 3. This is the directory where the ACD ToolBox applications and files reside. Click *Next* after selecting a sign data destination directory and proceed to the *Share the WallSign Data* window.

9. Use the *Share the WallSign Data* window to share the *SignData* folder across the network. Sharing this directory allows Enterprise, supervisor, and agent stations to connect to the directory and retrieve WallSign data. This window indicates the share name for the directory, the path to the directory, and the shared status of the directory.

✓ **Share the SignData Folder**

Click the *Share* button to share the *SignData* directory across the network. If the *SignData* directory does not exist already, the *Confirm New Folder* dialog box opens requiring the user to confirm the creation of the *SignData* folder. Click *Yes* in this dialog box to create the *SignData* folder.

View the *Status* field in the *Share the WallSign Data* window to confirm that the directory is shared. Click *Next* to accept the sharing of the directory and proceed to the *WallSign Server Settings* window.

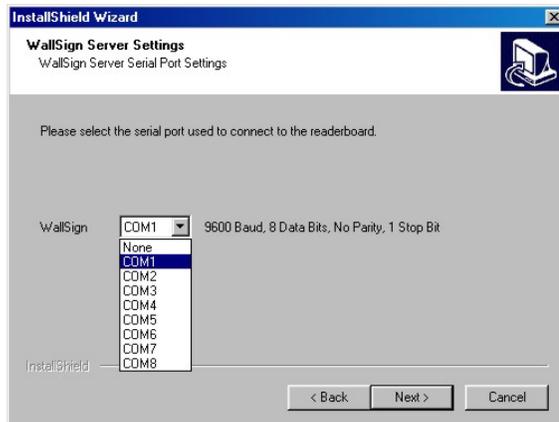
OR

Do Not Share the SignData Folder

Click the *Un-share* button to disable the sharing of the *SignData* directory. This is not recommended, as this directory must be shared to allow client applications to retrieve WallSign data from the server.

View the *Status* field in the *Share the WallSign Data* window to confirm that the directory is not shared. Click *Next* to proceed to the *WallSign Server Settings* window. The *Question* dialog box opens requiring the user confirm that the directory should not be shared. Click *Yes* to continue without sharing or click *No* to return to the *Share the WallSign Data* window and share the folder.

10. Select a communication port from the drop-down list in the *WallSign Server Settings* window. Ensure that the communication port is not in use by any other devices. This communication port acts as the communication link between the WallSign Server and the reader boards.



Click the *Next* button to accept the communication port selection for the WallSign Server and continue to the next window.

11. Use the *Choose the Voice ToolBox Data Destination Location* window to select the directory where the Voice ToolBox data files will reside. This window provides users with a choice of selecting the default voice data location or selecting another location.

✓ **Selecting the Default Voice ToolBox Data Destination Location**

Click *Next* to accept the default voice data destination directory of *c:\TASKE 8\VoiceData* and proceed to the *Share the Voice ToolBox Data* window.

OR

Selecting an Alternate Voice ToolBox Data Destination Location

Click *Browse* to open the *Choose Folder* dialog box. Use this dialog box to browse for another voice data destination directory. Ideally this directory should reside within the destination directory that was created in step 3. This is the directory where the ACD ToolBox applications and files reside. Click *Next* after selecting a voice data destination directory and proceed to the *Share the Voice ToolBox Data* window.

12. Use the *Share the Voice ToolBox Data* window to share the *VoiceData* folder across the network. Sharing this directory allows Enterprise, supervisor, and agent stations to connect to the directory and retrieve Voice ToolBox data. This window indicates the share name for the directory, the path to the directory, and the shared status of the directory.

✓ **Share the VoiceData Folder**

Click the *Share* button to share the *VoiceData* directory across the network. If the *VoiceData* directory does not exist already, the *Confirm New Folder* dialog box opens requiring the user to confirm the creation of the *VoiceData* folder. Click *Yes* in this dialog box to create the *VoiceData* folder.

View the *Status* field in the *Share the Voice ToolBox Data* window to confirm that the directory is shared. Click *Next* to accept the sharing of the directory and proceed to the *Collector Settings* window.

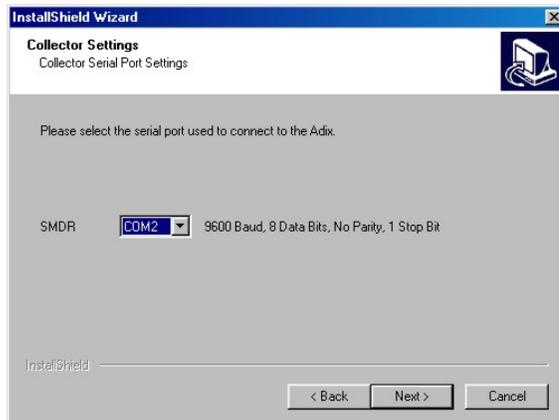
OR

Do Not Share the VoiceData Folder

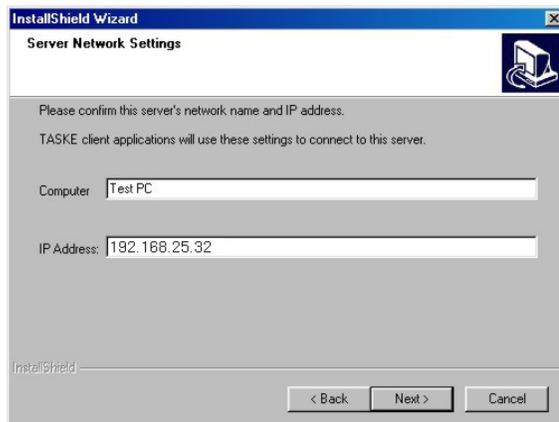
Click the *Un-share* button to disable the sharing of the *VoiceData* directory. This is not recommended, as this directory must be shared to allow client applications to retrieve Voice ToolBox data from the server.

View the *Status* field in the *Share the Voice ToolBox Data* window to confirm that the directory is not shared. Click *Next* to proceed to the *Collector Settings* window. The *Question* dialog box opens requiring the user confirm that the directory should not be shared. Click *Yes* to continue without sharing or click *No* to return to the *Share the Voice ToolBox Data* window and share the folder.

13. Select a communication port in the *Collector Settings* window. This is the communication port that receives the data stream from the PBX system. After selecting the communication port, click the *Next* button to accept the settings and continue to the *Server Network Settings* window.



14. Confirm the network name of the server PC and its IP address in the *Server Network Settings* window. The setup wizard automatically detects this information and it is used by the client applications to connect to the server.



Warning: the static IP address of the server PC should be present in the *IP Address* field. Do not use the local host IP address of 127.0.0.1. This is the local loop-back IP address for all PCs. Using this address causes client PCs to look for the Information Server within their own directory structure instead of looking over the network to the server PC.

If 127.0.0.1 is present in the *IP Address* field of this window, contact your system administrator and verify the assignment of the static IP address.

Click *Next* to accept the computer name and IP address and proceed to the *Share the Client Setup* window.

15. Use the *Share the Client Setup* window to share the *Setups* folder across the network. The *Setups* folder contains the setup applications for the client installations. This window indicates the share name for the directory, the path to the directory, and the shared status of the directory.

✓ Share the Setups Folder

Click the *Share* button to share the *Setups* directory across the network. If the *Setups* directory does not exist already, the *Confirm New Folder* dialog box opens requiring the user to confirm the creation of the *Setups* folder. Click *Yes* in this dialog box to create the *Setups* folder.

View the *Status* field in the *Share the Client Setup* window to confirm that the directory is shared. Click *Next* to accept the sharing of the directory and proceed to the *Setup Status* window.

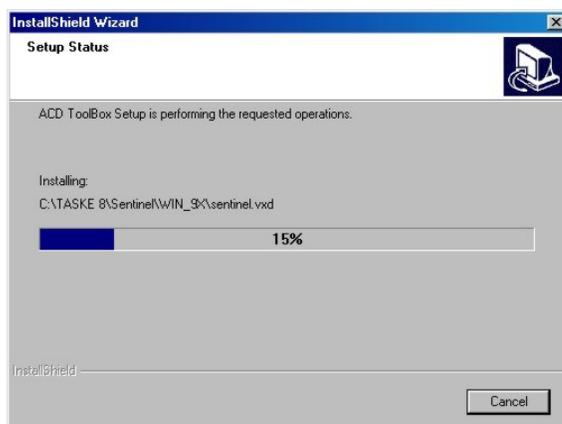
OR

Do Not Share the Setups Folder

Click the *Un-share* button to disable the sharing of the *Setups* directory. This is not recommended, as this directory must be shared to allow the network installation of the ACD ToolBox client applications.

View the *Status* field in the *Share the Client Setup* window to confirm that the directory is not shared. Click *Next* to proceed to the *Setup Status* window. The *Question* dialog box opens requiring the user confirm that the directory should not be shared. Click *Yes* to continue without sharing or click *No* to return to the *Share the Client Setup* window and share the folder.

16. The setup wizard proceeds to the *Setup Status* window where the installation of the ACD ToolBox commences. The progress bar in the *Setup Status* window indicates the percentage of the installation that is complete.



17. When the ACD ToolBox setup finishes, a dialog opens asking if you would like to populate your TASKE database with data from the phone switch.



Click *Yes* in this dialog to launch the *ADIX Database Conversion* utility. Click *No* to continue with the installation without running this database population utility. If you choose *Yes*, continue to *Using the Database Population Utility* for instruction on how to use this tool. When finished, return to this step and continue to the next.

18. After the installation of all server software is complete, the *Setup* window opens indicating that the TASKE ACD ToolBox server setup is complete. Click *Finish* to close the setup wizard and launch the installation program for the Sentinel drivers; the drivers required by the software lock.

Setup Complete

After closing the TASKE setup wizard, the Sentinel setup wizard will launch if the PC is not already equipped with the Sentinel drivers. The software lock requires these drivers.

If the setup wizard for the Sentinel drivers launches, please continue to the *Sentinel System Driver Installation* section of this guide. Otherwise, your installation is complete and you are ready to begin using the TASKE applications. Please continue to *Preparing to use the ACD ToolBox for the First Time*.

Using the Database Population Utility

The *ADIX Database Conversion* utility converts a PBX file you select to a format compatible with Version 8.1 of the ACD ToolBox, extracts the relevant database information, and places this information in the appropriate tables of the TASKE database.

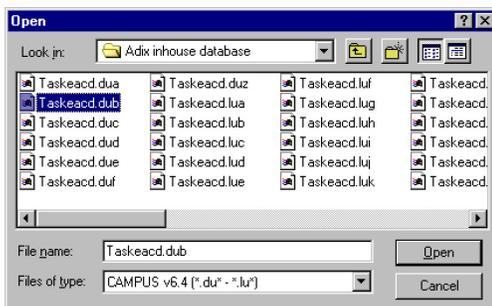
Once the database population is complete, you can view, modify, and delete database entries using the TASKE Administrator application of the ACD ToolBox. Refer to the TASKE Call Center Management Tools Application User Manual or the Online Help for information on using the Administrator application.

Use the following steps to select a PBX file and populate the TASKE database.

1. Launch the *ADIX Database Conversion* utility.



2. Click the  (browse) button to open the *Open* dialog box.



3. Browse to the location of the desired PBX files. These files may reside on the local PC or on any network connected PC.
4. Select the appropriate file type from the *Files of type* drop-down list.
Note: If you do not have the appropriate file type selected, you may not see any files listed in the directory. If you expect to see files in the directory, but see none, try selecting another file type.
5. Select *one* of the displayed files. Only one file is required to populate the database with all database elements.
6. Click *OK* in the *ADIX Database Conversion* window.
7. Open the TASKE Administrator application to view the database entries.

Sentinel System Driver Installation

The Sentinel System Driver setup wizard guides users through the installation of the Sentinel driver files on the TASKE server. Use the following steps to complete the installation using the setup wizard.

1. The first window in the Sentinel System Driver setup wizard is the *Welcome to the InstallShield Wizard for Sentinel System Driver* window. This window informs users that the wizard will install the drivers on the PC. Accept the license agreement and click *Next* to continue to the *Setup Type* window.
2. The *Setup Type* window allows the user to select one of two install types. Select the *Complete* installation to ensure proper operation of the software lock after the installation.

✓ Complete

Ensure the *Complete* radio button is enabled and click *Next* to proceed to the *Ready to Install the Program* window.

OR

✗ Custom

Do not select the *Custom* installation type. Selection of this option opens the *Custom Setup* window where the user must manually configure the installation. Selecting the wrong options during a custom setup may cause the software lock to perform improperly after installation.

3. The *Ready to Install the Program* window informs users that clicking the *Install* button will begin the installation process. Click *Install* to begin installing the program. A window opens indicating the progress of the installation.

Note: if you are using a USB software lock and it is connected to the server PC, you will need to remove the lock from the PC and re-install it when the installation is complete.

4. When the installation is complete, the *InstallShield Wizard Completed* window opens. Click *Finish* to close the setup wizard.

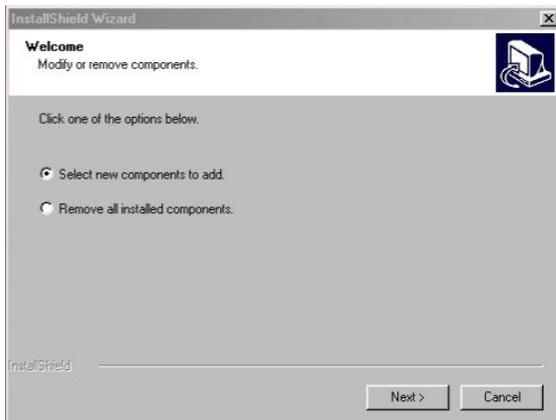
Do Not Reboot the PC at this time. You are prompted to reboot at the end of the Sentinel driver installation. This reboot is required, particularly on systems using Windows NT, to start certain services. You will be prompted to reboot your PC when you prepare to use the ACD ToolBox for the first time. Rebooting at that time is sufficient.

Adding or Removing Components after a Server Installation

If some required components were not installed during the server installation or the ACD ToolBox needs to be removed, launch the setup wizard for the TASKE ACD ToolBox.

Warning: shutdown all TASKE applications on the server PC before attempting to add or remove server components.

Launching the setup wizard on a PC with installed components of the current version opens the *Welcome: Modify or remove components* window.



If the installation of additional components to the installed version is desired, enable the *Select new components to add* radio button and click *Next* to continue to the *Select Components* window. Continue with step 4 in the *Step-by-step Instructions for a Successful Server Installation* section of this guide.

If the removal of the installed components is desired, enable the *Remove all installed components* radio button and click *Next* to proceed with the removal. Click *Finish* when the removal of the installed components is complete.

Preparing to use the ACD ToolBox for the First Time

Although the setup is complete, some tasks must be completed before using the ACD ToolBox. The tasks you must complete are:

- verify Microsoft Internet Explorer 5.5 is installed
- if you installed the Voice ToolBox, ensure the required drivers are installed for the Dialogic voice card.
- attach the TASKE software lock to the server PC
- reboot your PC
- start the TASKE Information Server

Installing Microsoft Internet Explorer 5.5

Internet Explorer 5.5 or greater must be installed prior to performing the ACD ToolBox installation. This application is required for using the Microsoft Scheduled Tasks application and for viewing the Online Help for the applications of the ACD ToolBox. The application is provided for installation on the TASKE Call Center Management Tools CD and is available for download from the Microsoft web site.

To locate the setup program for Internet Explorer 5.5 on the TASKE Call Center Management Tools CD, click the *Install Utilities* button on the CD browser. This opens the *Install Utilities* window. Click the *Microsoft® Internet Explorer 5.5* button to launch the setup program.

Installing Dialogic Drivers

To locate the setup program for the Dialogic drivers on the TASKE Call Center Management Tools CD, click the *Install Utilities* button on the CD browser. This opens the *Install Utilities* window. Click the *Dialogic® DNA Drivers 3.3* button to launch the setup program.

Attaching the TASKE Software Lock

The software lock is a connector that attaches to a port on the server PC. The lock may be a parallel connector, meaning it connects to the parallel port of the PC, or it may be a USB connector, meaning it connects to an USB port on the PC. The lock must be connected to the server PC at all times. If the lock is not connected to the server PC, none of the applications in the ACD ToolBox will run. Please refer to the *Appendix B – Server PC Hardware Installation and Configuration* section of this guide for information on attaching the software lock to the TASKE server PC.

Rebooting your PC

Although you are not prompted to do so at this time, you must reboot your PC to ensure that all required services are started. Rebooting allows all new software and services to properly register in the PC. When the PC reboots, continue with the remaining tasks.

Starting the Information Server

Use the following steps to start the Information Server application on the TASKE server PC. You must start the Information Server prior to populating the database in order to initialize the licensing for the system.

1. Select *Programs* from the *Start* menu of the Windows.
2. Select *TASKE 8.1* from the *Programs* folder.
3. Select *Information Server* to start the Information Server.
4. View the SMDR tab of the Information Server to verify that data collection is occurring. If data collection is occurring, events will be streaming through the SMDR Events area of the tab.

If there are no SMDR events, there is a problem with data collection, contact TASKE Technical Support for assistance.

Performing Network Client Installations of the Call Center Management Tools

A network connection to the Setups directory on the TASKE server is the only requirement for performing an installation of the Call Center Management Tools client applications on a network connected PC. There are four different types of client installations. These are described below.

Agent – installs the Agent Desktop application on an agent station. The Agent Desktop is a real-time application with a chat feature that mimics a reader board on the desktop of the agent station. To run the Agent Desktop application from an agent station, the site must be licensed to use the application.

Supervisor – installs the supervisor-based applications of the ACD ToolBox on the supervisor station. These applications include the Administrator, ACD Monitor, Reports, Search, and Traffic Analyzer.

Enterprise Supervisor - installs the enterprise supervisor-based applications of the ACD ToolBox on the supervisor station. These applications include the Administrator, ACD Monitor, Enterprise ACD Monitor, enterprise-enabled Reports, Search, and Traffic Analyzer.

Voice ToolBox – installs the Voice Administrator application on any network connected PC. The Voice Administrator allows users of the application to create and edit voice plans and upload these voice plans to the Voice Server application on the TASKE server.

WallSign – installs the WallSign Administrator application on any network connected PC. The WallSign Administrator allows users of the application to create and edit sign plans and upload these sign plans to the WallSign Server application on the TASKE server.

Internet Explorer 5.5 or greater must be installed prior to performing the installation. This application is required for using the Microsoft Scheduled Tasks application and for viewing the Online Help. This application is provided for installation on the TASKE Call Center Management Tools CD and is available for download from the Microsoft web site.

To locate the setup program for Internet Explorer 5.5 on the TASKE Call Center Management Tools CD, click the *Install Utilities* button on the CD browser. This opens the *Install Utilities* window. Click the *Microsoft® Internet Explorer 5.5* button to launch the setup program.

Use the following steps to perform any of the above network installations. The procedures are the same, regardless of the installation type.

1. Select *Run...* from the *Start* menu of the Windows taskbar to open the *Run* dialog box.
2. Click the *Browse* button to open the *Browse* dialog box.
3. Locate the *TASKE Server* on the network and select the *Setups* directory. Click *Open* to view the contents of the directory. The *Setups* directory contains a folder for each installation type. The names of these folders are:
 - a) Agent
 - b) Supervisor
 - c) Enterprise Supervisor
 - d) Voice ToolBox
 - e) WallSign
4. Select the folder for the desired installation type and click *Open* to open the folder.
5. Select *Setup.exe* from the selected folder and click *Open*. This places the path to the setup wizard of the desired installation type in the *Run* dialog box.
6. Click *OK* in the *Run* dialog box to launch the setup wizard for the selected installation type.

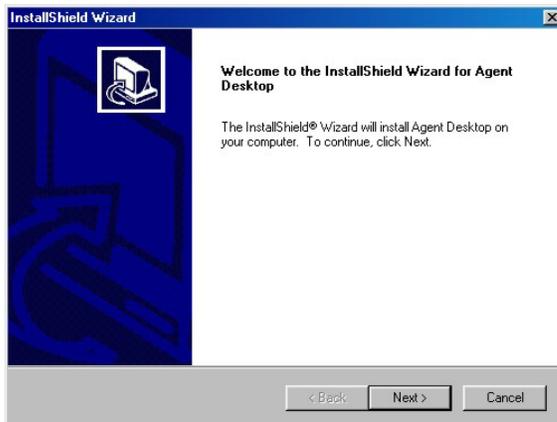
If a previous version of the TASKE Call Center Management Tools already exists on the PC, the setup wizard prompts for the deletion of the previous version in the *Confirm File Deletion* dialog box. Click *OK* in this dialog box to delete the previous version. Click *Finish* in the *Maintenance Complete* window to complete the deletion. Return to the *Setups* directory on the TASKE server, select the desired setup type and run *Setup.exe* to launch the setup wizard.

Microsoft Internet Explorer 5.5 or greater is required to view the Online Help for the applications of the ACD ToolBox. If the server PC is not equipped with Microsoft Internet Explorer 5.5 or greater, the *Error* dialog box opens indicating that Microsoft Internet Explorer 5.5 or greater is required. Microsoft Internet Explorer is provided on the TASKE Call Center Management Tools CD

If Internet Explorer 4.0 or less is installed on the PC, the installation will be stopped and Internet Explorer 5.5 must be installed prior to attempting the installation again.

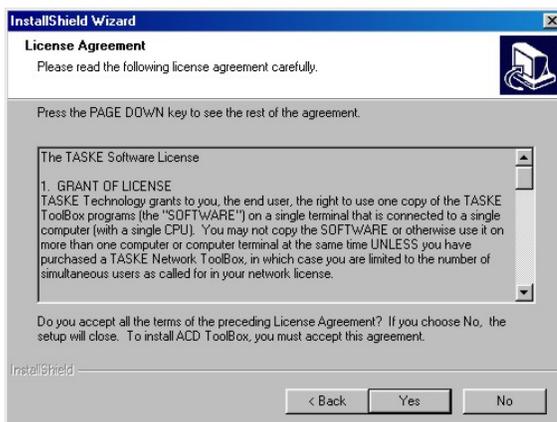
If the PC is already equipped with Internet Explorer 5.0 or greater, click *OK* to proceed. The installation of the ACD ToolBox may proceed, but Internet Explorer 5.5 must be installed immediately following the installation.

- The first window in the setup wizard is the *Welcome to the InstallShield Wizard for Installation Type* window. This window introduces users to the installation.



Click *Next* to proceed to the *License Agreement* window.

- Click *Yes* to agree to the terms of the TASKE Technology software license and proceed to the *Setup Status* window.



Clicking *No* means the user does not agree to the terms of the TASKE Technology software license. This action terminates the installation.

- The installation commences in the *Setup Status* window. The progress bar in the *Setup Status* window indicates the percentage of the installation that is complete.
- When the installation is complete the *InstallShield Wizard Complete* window opens. Click *Finish* to close the setup wizard.

Obtaining Upgrade Software

If the TASKE software is in warranty, the site is eligible to receive *free* upgrades. If the site warranty has expired, a dealer must be contacted, and the warranty renewed before new license files can be issued.

If receiving new license files via email, copy the new files to a floppy disk — this disk becomes the new Administration disk and replaces all previous versions of the Administration disk. The new license files are compatible with the existing software lock.

Automatically Updating Supervisor and Agent Stations after a Server Upgrade

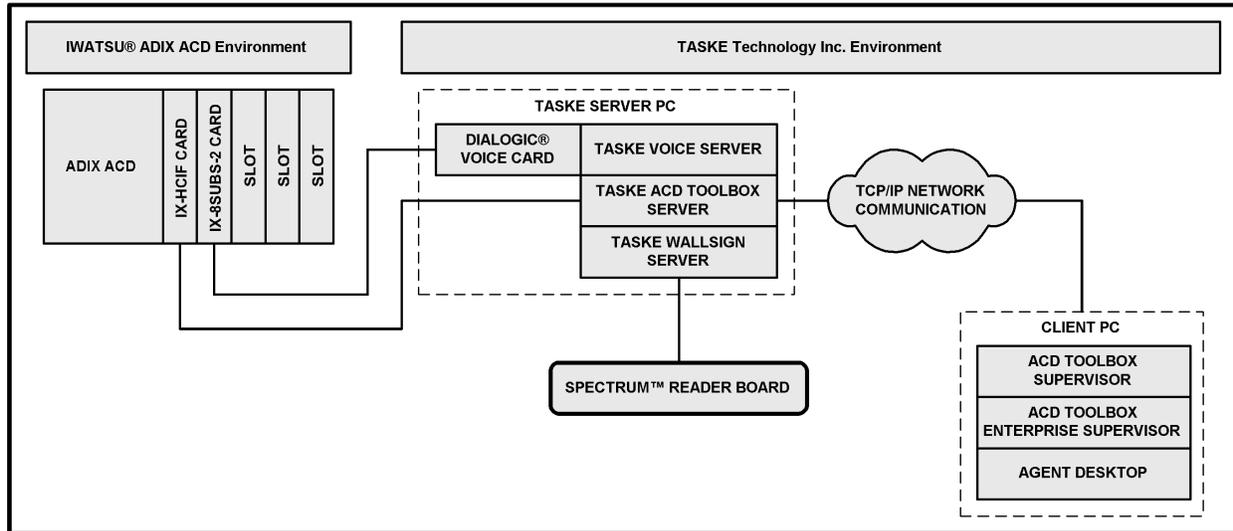
Upgrading the TASKE server PC with a new version of the TASKE ACD ToolBox creates a version mismatch between the server and the client PCs. To avoid conflict between the server and client PCs, the client versions of the software are also installed on the server.

Every time a client PC starts a TASKE application, a version check is performed, comparing the software version on the client PC with the software version on the server. If there is a version mismatch, the server sends a message to the client PC indicating that an upgrade of the client software is necessary. The dialog box provides the opportunity to upgrade the client software or terminate the application.

Selecting the upgrade option automatically installs the new version of the TASKE ACD ToolBox on the client PC. The installation is performed using the same configuration that already exists on the PC (Supervisor, Enterprise Supervisor, WallSign Administrator, Voice Administrator, or Agent).

Appendix A – TASKE and the Telephone System

Use this appendix to understand the interaction between the telephone system and the TASKE Call Center Management Tools. The diagram below illustrates the required components. Definitions for each component are supplied in the table below the diagram.



Component	Description
ADIX ACD VERSION 2.0 OR LATER	This is the PBX system supplying data to the TASKE server PC.
IX-HCIF CARD	The IX-HCIF card provides a high-speed interface between the ADIX ACD and the TASKE server PC.
IX-8SUBS-2 Card	The ADIX ACD must be equipped with a IX-8SUBS-2 card if using the TASKE Voice ToolBox application. The IX-8SUBS-2 card provides a connection to the voice ports of the Dialogic cards in the TASKE Voice ToolBox Server PC.
TASKE ACD TOOLBOX SERVER	The TASKE server PC collects real-time contact center data from the PBX system. Data is dispersed, in real-time, to client applications and stored for reporting purposes. For contact centers with multiple sites, TASKE Enterprise licensing is available, allowing server PCs at different locations to share data. For detailed specifications, please refer to the requirements for TASKE server PCs.
TASKE VOICE TOOLBOX SERVER	The TASKE Voice Server may be the TASKE server PC or any network connected PC. The TASKE Voice Server application software resides on this PC and drives the messaging to the Dialogic voice cards that must also reside on this PC. For detailed specifications, please refer to the requirements for TASKE Voice Server PCs.

Component	Description
TASKE WALLSIGN SERVER	<p>The TASKE WallSign Server may be the TASKE server PC or any network connected PC. The TASKE WallSign Server application software resides on this PC and drives the messaging to the Spectrum reader boards that must be directly connected to this PC. A contact center may have more than one WallSign Server PC. Install the WallSign Server software and connect one or more reader boards wherever reader board messaging is required. For detailed specifications, please refer to the requirements for TASKE WallSign Server PCs.</p>
DIALOGIC VOICE CARD	<p>Dialogic voice cards are installed in the Voice ToolBox server PC. This PC may be the TASKE server or any network connected PC. The Dialogic voice cards provide the voice ports required by the Voice ToolBox. The server may be equipped with up to 64 voice ports, or 4 16-port cards.</p> <p>Use any of the following cards from Dialogic:</p> <ul style="list-style-type: none"> • D/41D (full-size card) • D/41E (UK full-size card) • D/41H (half-size card) • D/160SC-LS • Dialog/4 (half-size card) • D/4PCI <p>Dialogic voice cards are distributed by TASKE Technology Inc. with the Voice ToolBox software. Alternatively, dealers may supply Dialogic voice cards directly from the manufacturer.</p>
SPECTRUM READER BOARD	<p>If implementing reader board messaging in the contact center, one or more Spectrum reader boards are required to interface with TASKE WallSign. Spectrum reader boards connect directly to the TASKE WallSign server PC and connect to each other in a daisy-chain fashion. The WallSign server PC may be the TASKE server or any network connected PC. TASKE WallSign does not limit the number of reader board connections.</p>
ACD TOOLBOX SUPERVISOR	<p>Installed on a client PC at supervisor stations, the TASKE ACD ToolBox Supervisor suite provides the tools a supervisor needs to effectively manage a contact center.</p> <p>The following applications are included in this suite:</p> <ul style="list-style-type: none"> • ACD Monitor • Reports • Administrator • Traffic Analyzer • Search

Component	Description
ACD TOOLBOX ENTERPRISE SUPERVISOR	<p>An optional licensing addition to the ACD ToolBox is enterprise licensing. Enterprise licensing centralizes the real-time monitoring and reporting for contact centers that have two or more physical locations by allowing the TASKE server PCs at both locations to communicate via TCP/IP.</p> <p>With enterprise licensing the ACD ToolBox is enhanced with the Enterprise ACD Monitor and the Reports application is enterprise-enabled.</p> <p>The following applications are included in this suite:</p> <ul style="list-style-type: none">• ACD Monitor• Enterprise ACD Monitor• Reports• Administrator• Traffic Analyzer• Search
AGENT DESKTOP	<p>Typically, the Agent Desktop is installed at agent stations, giving agents access to valuable real-time queue information. Using this information, agents are able to tailor their service to the amount of contact center traffic and maintain the expected service levels.</p>

Appendix B – Server PC Hardware Installation and Configuration

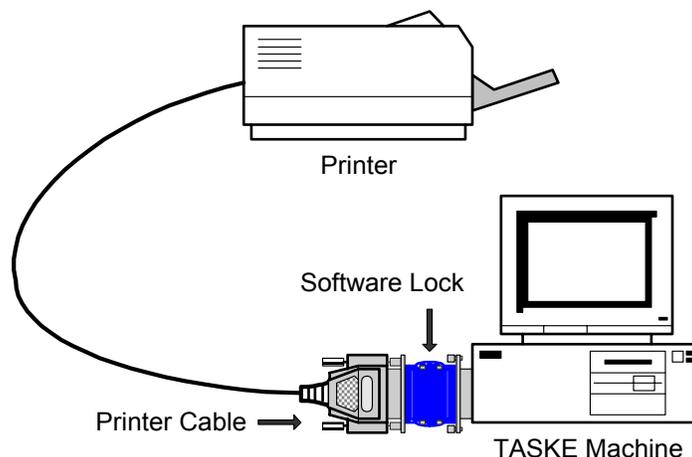
Use this section as an aid in the installation and configuration of the various hardware components required in the TASKE server PC and the TASKE Voice ToolBox Server PC (the Voice ToolBox Server PC may be the TASKE server or any network connected PC).

Software Lock Installation

Use the following instructions to install the TASKE software lock on the TASKE server PC. Install the lock after the server software is installed. Do not attempt to run TASKE software before installing the software lock.

If using the USB version of the TASKE software lock, simply attach the lock to a spare USB port on the back of the server PC after installation of the Sentinel drivers, the drivers required by the software lock. If the lock is connected to the PC during the driver installation, the driver setup will not be completed properly.

The parallel port version of the software lock attaches to the parallel port of the PC. If a printer is connected to the parallel port, disconnect the printer, plug the software lock into the printer port, and plug the printer cable into the female end (end without pins) of the software lock. This setup is illustrated below.



The software lock must remain connected to the TASKE server in order for the applications of the ACD ToolBox to operate.

Dialogic Card Configuration

A Dialogic card provides voice ports that are required to achieve connectivity between the Voice Server and the telephone system. The cards must be installed in a spare PCI/ISA slot of the TASKE server PC. The TASKE Voice ToolBox currently supports the following models of Dialogic cards:

D/41D (full-size card)	D/41E (UK full-size card)
D/41H (half-size card)	D/160SC-LS
Dialog/4 (half-size card)	D/4PCI

For further information on Dialogic cards, refer to the manufacturer's documentation or visit www.dialogic.com.

When you have completed your Dialogic card configuration, you are ready to begin creating your voice plans in the Voice ToolBox Administrator. Please refer to the Voice ToolBox Configuration Guide and the Voice ToolBox section of the Application User manual that are provided on the TASKE Call Center Management Tools CD.

Assumptions

When you begin your Dialogic card configuration, it is assumed the following is complete:

- the ACD ToolBox is installed on the TASKE server PC
- the Voice ToolBox Server is installed on the Voice ToolBox Server PC (this may be the TASKE server PC or any network connected PC)
- the Dialogic card(s) are physically installed in the Voice ToolBox Server PC
- the DNA 3.3 Dialogic drivers are installed on the Voice ToolBox Server PC
- the telephone system vendor or technician has wired the analog ports of the telephone system to the voice ports of the Dialogic card(s). Refer to the manufacturer's documentation for information on how to split the wires from 4 ports to 2 ports.

Starting your Dialogic System Service

The Dialogic System Service must be started to initialize the Dialogic card(s) and the device drivers. Use the following steps to start your Dialogic System Service and setup the service to start automatically when the PC reboots.

1. Click the *Start* button on the Windows task bar.
2. Select *Programs* from the Start menu.
3. Select the *Dialogic System Software* program group from the Programs menu.
4. Select *Dialogic Configuration Manager – DCM* from the *Dialogic System Software* program group. The Dialogic Configuration Manager starts, and automatically begins to detect the presence of the Dialogic card(s) in the PC.
5. Verify the presence of the Dialogic card(s) in the *Configured Devices* branch of the Dialogic Configuration Manager tree.
6. In the toolbar verify the presence of a green or red button. Proceed according to the color of button you're viewing.
 - a. **Red Button** – if you are viewing a red button in the toolbar, the Dialogic System Service is started. *Leave the service in this state and continue to step number 8.*
 - b. **Green Button** – if you are viewing a green button in the toolbar, the Dialogic System Service is not started. *You need to start the service. Please continue to the next step.*
7. If the service is not started, select *Start Service* from the *Service* menu. If the service fails to start, do not continue. Please refer to the troubleshooting section included in the manufacturer's installation instructions for help in starting the service. Once you have successfully started the service, please return to this document and continue with the configuration process.
8. The service is started. Select *Startup Mode* from the *Service* menu and enable the *Automatic* option. This tells the service to start automatically when the PC reboots.
9. Verify once again the service is started. If all is well, close the Dialogic Configuration Manager and continue to your wiring test.

Testing your Wiring

The final step in the Dialogic card configuration is to test the wiring. Besides physically checking the wiring connections, Dialogic provides a software utility called *Asynchronous Callback* that tests the ports and verifies they are functioning properly.

Use the following steps to test the wiring of your Dialogic ports.

1. Physically check the wiring from the telephone system to the Dialogic voice ports. If all seems well, continue to the next step. If the wiring is not adequate, complete the wiring before continuing.
2. Click the *Start* button on the Windows task bar.
3. Select *Programs* from the Start menu.
4. Select the *Dialogic System Software* program group from the Programs menu.
5. Select *Asynchronous Callback* from the *Dialogic Sample Programs* folder. The *CBANSR – Multiline Asynchronous Answering Phone Demo Program* opens.
6. Select *Start* from the *Action* menu to place your Dialogic voice ports in a testing mode.
7. Dial the extension number that you believe is wired to your first Dialogic voice port.
 - a. Did the test application answer the port?
 - b. Did you hear the message from the test application?

If the port was not answered or you did not hear a message, a wiring or Dialogic configuration problem is present. At this point you can return to the beginning of this section and attempt to reconfigure your Dialogic card(s) or refer to the manufacturer's documentation for troubleshooting tips.

8. Repeat the above step with each Dialogic voice port. If all ports are operating properly, you have successfully configured your Dialogic card(s). Close the test software and record your port information in the table provided in the next section.

Recording your Port Information

Use the table below to record your port information. This information will prove invaluable when you are creating your voice plans in the Voice ToolBox Administrator.

Dialogic Card Size (# of Ports)	Port Number	Telephone System Extension Number	Channel Type (Admin / AA / Delay Announcement)
4-Port Dialogic Card	Port 1		
	Port 2		
	Port 3		
	Port 4		
8-Port Dialogic Card	Port 5		
	Port 6		
	Port 7		
	Port 8		
12-Port Dialogic Card	Port 9		
	Port 10		
	Port 11		
	Port 12		
16-Port Dialogic Card	Port 13		
	Port 14		
	Port 15		
	Port 16		

Note: a PC may contain more than one Dialogic card. The Voice ToolBox can support a range of Dialogic voice ports from 4 to 64.

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