

TASKE® ACD ToolBox
Installation Guide
Version 7.0

for the
MITEL® SX-200® DIGITAL PBX

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Chapter 1: Installation Overview

This Installation guide provides instructions for installing the TASKE ToolBox software. And describes how to configure a TASKE Server and network connected PCs. You'll find installation procedures specific to each type of install (server and client).

This guide also contains detailed reference information about the Microsoft network environment and the interface to the host PBX system.

The TASKE Environment

The TASKE ToolBox may be installed in a client-server (network) configuration. In a network configuration, the TASKE system comprises a network server and one or more client PCs. The installation procedures in this guide refer to the functional units in the TASKE environment as described below.

TASKE Server The TASKE Server is connected to the host PBX system. The TASKE ACD ToolBox (which includes the TASKE ACD Collector program) collects raw PBX data and stores it in a format that can be shared by other TASKE programs.

When you install TASKE software, the **ServerPath** path refers to the location of TASKE data, regardless of whether it resides on the TASKE Server or on a network-connected file server.

TASKE Client PC Although a TASKE Client PC has all the functionality of a TASKE Server, it isn't connected directly to the host PBX system. However, the ACD Collector program running on a TASKE Client PC can share TASKE data through a network connection.

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 that you're using Microsoft Networking — Windows 95, Windows 98, and Windows NT all come with Microsoft Networking services built into the operating system.

A Word about TCP/IP

The installation procedures in this guide also assume that TCP/IP is installed, configured, and working properly on all PCs in the TASKE network — the TASKE ACD ToolBox uses port number 5200 to communicate with other TASKE programs. Please verify that port 5200 isn't being used on your network.

If you have to test the operation of TCP/IP to ensure that it is working properly, try the following:

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- At each of the PCs running TASKE Call Center Management Tools, 'ping 127.0.0.1', which is the local host address (referring to the machine that you are sitting at). 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 you can do this, TCP/IP should be working properly.

Chapter 2: 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 or distributed only in accordance with the terms of your license agreement.

Unlocking the TASKE Software

TASKE Technology Inc. administers the legal use of TASKE software through software locks, Administration disks, and license files. This section explains how the software lock and license files work together.

Software Lock Driver Software

Windows 95, Windows 98, and Windows NT do not allow applications to communicate directly with the hardware of the machine. All requests must be done through the operating system and the drivers. Therefore, a driver must be installed in order for TASKE to communicate with the software lock. This driver (Sentinel) is copied to the TASKE Server automatically when you install the TASKE ToolBox.

When you install the TASKE ToolBox, you are prompted to specify a path (**ExePath**), which the computer will use to locate TASKE ToolBox programs and files. The Sentinel drivers for the software lock are copied into subdirectories of the directory you specify. By default, the installation script creates a target directory called “**taske**” on drive **c:** and copies the programs and files there. For example, if you accept **c:\taske** as the **ExePath**, the drivers for the software lock are copied to the **c:\taske\Sentinel** directory.

Software License Files

The TASKE ToolBox checks for the presence of two software license files 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 I.D. number that’s programmed into the software lock determine which software features and functions will be made available to you via the TASKE ToolBox.

License files are shipped on the Administration disk. When you install the TASKE ToolBox, the installation script prompts you for the location of these license files. Typically, you will only need to confirm the default path, **a:** (assuming drive **a:** is mapped to the floppy disk drive). The installation script copies the license files from the floppy disk to the TASKE Server automatically, saving them to the **taske** directory.

Registering Your Software

Please take a few minutes to complete and submit your registration card. Registering your software will allow you to qualify for free software upgrades. You will also be put on our mailing list so that you can stay informed of new releases and other important information related to TASKE Call Center Management Tools.

Upgrading TASKE Software

If you are upgrading from a previous release of TASKE software, we recommend that you download the latest software from the TASKE web site (www.taske.com). The software is available in self-extracting, compressed-file format. You may download a single file (recommended if you have a fast connection to the Internet) or download a number of smaller compressed files one at a time (recommended if you have a slow or undependable connection).

After downloading the files, you will have to contact TASKE Technology Inc. for new license files. When you contact TASKE Technology Inc. for new licensing information, please have your software Lock Number on hand. New licensing information is provided electronically through email or on a new Administration disk through ground mail.

Tip: You are eligible to receive *free* upgrades if your TASKE software is under warranty. If your software warranty has expired, you must contact your dealer to renew your warranty before new license files can be provided.

If you receive new license files via email, copy the new files to a floppy disk — this disk will become your new Administration disk. The new disk will replace previous versions of the Administration disk. The new disk may be used with your existing software lock (dongle).

Downloading Files from the TASKE Web Site

To download and decompress files obtained from the TASKE web site:

1. Using your favorite web browser, go to the download area of the TASKE web site (www.taske.com).
2. Click the file that you would like to download. Your browser will prompt you to open or save the file.
3. Save the file to a temporary area on your computer's hard disk. Your browser will start downloading the selected file.
4. If you are downloading several smaller files, repeat Step 3 until all the files you need have been downloaded.
5. Decompress the downloaded files:

In the Windows **Explorer**, double-click each of the downloaded files one at a time. This starts the self-extraction process. Several directories named **Disk1**, **Disk2**, **Disk3**, etc. will be created in the directory where your compressed files have been saved.

If you downloaded one file, you must run the WinZip program, in order to allow Winzip to create all of the subdirectories required for the TASKE ToolBox install to function properly. If you do not run the WinZip application to unzip the downloaded file, the unzip will fail.

Chapter 3: ToolBox Installation for Server

Overview

This chapter describes the options and steps to follow while installing the TASKE server software on a computer running Windows 95, 98, or NT 4.0. The TASKE software can be installed from the TASKE Call Centre Management Tools CD-ROM or from files that have been downloaded from the TASKE web site.

After installing the TASKE ToolBox, certain file and directory access permissions must be properly configured for the TASKE software to communicate with the TASKE Server. You must:

- Set up directory sharing on the **taske** directory.

The following directories need to be shared on the TASKE Server. Note that not all of these directories will exist, depending on which server component you select to install.

- **SiteData** (stores all the PBX data, summaries, and database for the ACD Toolbox Server)
- **SignData** (stores the database for the Wall Sign Server)
- **VoiceData** (stores the database and sound files for the Voice Server).

IMPORTANT: Ensure that all other programs are shut down before installing the TASKE software.

It is not possible to install this software without your licensing information. During the installation you are requested to insert a disk named License Info, or be able to provide the directory Path where this information resides.

If you are upgrading from version 3.10.XXX of the TASKE ACD ToolBox, the software converts these files to the PBX format. This procedure can take several hours depending on the quantity and size of PBX data files. However, the TASKE ACD Collector continues to collect records during the conversion process.

Please ensure your system has the necessary hardware configuration recommended by TASKE for use with the TASKE ACD ToolBox and Voice ToolBox applications.

Requirements

Please ensure your system has the necessary hardware configuration recommended by TASKE for use with the TASKE Toolbox and TASKE Voice Toolbox applications.

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TASKE ToolBox Hardware Requirements

Operating System	Processor: IBM@PC, IBM PS/2 or 100% Compatible
CPU	Pentium II - 266 MHz (min)
Required Software	Windows 95, 98 or Windows NT 4.0 SP4 Internet Explorer 4.0 or later (required to view Online Help)
Memory (RAM)	64 MB (min)
Monitor	Super VGA or Better
Disk Space	4.0 GB (min)
Floppy Drive and CDRom Drive	3.5" HDD 4 X CDRom Drive (For installation)
Communications Ports	2 RS-232 Communications Ports (Co-Processor such as DIGIBOARD)
Printer Ports	1 Parallel Printer Port
Printer	1 Laser Printer
Mouse	Bus , serial, or PS/2 mouse
Network	Network Card with Winsock 1.1 compliant TCP/IP Stack

TASKE Voice ToolBox Hardware Requirements

TASKE ACD ToolBox	Version 7
Required Software	Windows 95, 98 or Windows NT 4.0 SP4 Internet Explorer 4.0 or later (required to view Online Help)
RAM	64 MB
Disk Space	4.0 GB
Video	Super VGA Monitor with PCI Video Card
Network	Network card with Winsock 1.1 compliant TCP/IP stack
Computer	Pentium II - 266MHz (min), 4 ISA slots
Sound Card	SoundBlaster or compatible (for Voice Config)
Voice Card	Dialogic D/41D,D/41H, Dialog/4 or D/41E (UK version) See Appendix C
Floppy Drive	3.5 " HDD
Communication Ports	2 RS-232 communication ports
Mouse	Bus , serial, or PS/2 mouse
Backup Power Supply	Mini UPS (for Voice Machine only)

Assumptions

The installation procedure assumes that:

- The host PBX system has been configured to support TASKE software (refer to Appendix A)

- The host PBX system and the TASKE Server have been connected (refer to Appendix A)

If you are installing the TASKE software in a network environment (i.e. you are installing TASKE Call Center Management Tools on a number of network-connected computers), we additionally assume that the following software has been installed, configured, and tested on each PC:

- Microsoft file and printer sharing services
- TCP/IP network protocol services

If you are installing the TASKE database on a network-connected file server, we assume that:

- the file server has sufficient capacity for the TASKE database
- a logical network drive has been mapped to the file server (**ServerPath** directory) from the TASKE Standalone PC or TASKE Server (see “Mapping a Network Drive” in Appendix B)

Hardware Installation

The hardware installation involves:

- Installing the DigiBoard serial communications card.
- Installing the TASKE Software Lock.

DigiBoard Installation

A *Digi board* is an intelligent serial communication card inserted into a spare slot on a PC's motherboard. TASKE recommends the use of Digi "smart cards" (ex. XE series) with the ACD ToolBox for the following reasons.

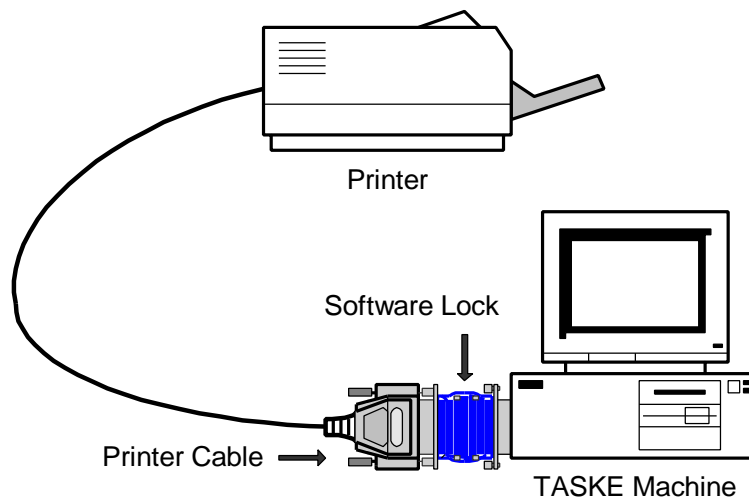
- they provide additional communication ports, without using system IRQs
- they have an onboard processor for buffering data
- they are supported by Windows For Workgroups, Windows 95, and Windows NT

To install a Digi board and its software drivers, please refer to the Digi installation guide provided by the manufacturer of the board.

Software Lock Installation

The software lock is a blue adapter connected to the printer port on the TASKE machine and connected to the telephone switch. The male end of the software lock (the end with pins) connects to the parallel (printer) port on the back of the TASKE Server or Standalone machine.

If there is a printer already connected to the printer port on the PC, you must 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.



Important: The software lock (dongle) must remain connected to the TASKE Server as long as TASKE Call Center Management Tools are being used.

ECP and EPP Parallel Ports

The TASKE ToolBox requires a standard parallel port for the software lock to function properly. Most Pentium systems include an on-board, high performance Parallel Port configured through the system's CMOS settings. The following sections discuss the steps required to configure the hardware and operating system software as a standard parallel port.

Hardware Configuration

To disable extended bidirectional (i.e. ECP port) functionality and force the port to emulate a standard printer port, you must disable the ECP port functionality through the system's CMOS settings. Although each system is different, the option can usually be found under **Chipset Features Setup** or **Peripherals Configuration**. Ensure the Port Type or Port Mode is set to Normal, AT, or SPP. It should not be configured as ECP or EPP.

Note: If you require more information about configuring the port via CMOS settings, refer to the hardware documentation that came with your computer.

Note Configuring the hardware alone in Windows 95 may not enable the software lock to function properly. Configuring the Windows 95 operating system software may be required. For instructions about how to configure the parallel port under Windows 95, see Appendix B.

Note: Bi-directional printers (such as the HP 5 Laserjet series) connected to the software lock can fool the operating system into thinking the lock is not present. In the event a bi-directional printer is connected to the TASKE Server, TASKE recommends that the bi-directional functionality of the printer be disabled.

Software Installation

Follow the procedure below to install TASKE ACD ToolBox software and the TASKE database from the TASKE Call Center Management Tools CD-ROM, or from files that have been downloaded from the TASKE web site.

Before You Begin

To ensure a successful, first-time installation, verify that the TASKE Server has at least 4 GB of free disk space on the target hard drive (for storing TASKE programs and TASKE data), and have the following items on hand:

- TASKE Call Center Management Tools CD-ROM, or decompressed files from the TASKE web site.
- Administration floppy disk.

Important: The **readme.txt** file on the CD-ROM contains important, last-minute information about TASKE Call Center Management Tools. Before you start the installation procedure, please review the **readme.txt** file — it can be opened on the CD-ROM using a text editor.

If You are Upgrading

When you install the TASKE ToolBox, any existing program files are overwritten. Although the installation procedure has no effect on the TASKE database, it is a good idea to back up the data if you are about to upgrade from a previous release of TASKE ToolBox software.

Installing the TASKE ToolBox Server Software

Note: If you are installing a Network version, you must shut down all TASKE ToolBox software on each TASKE Client and TASKE Server and install the software on the TASKE Server first. The ACD Collector must be shutdown before beginning and the computer must be re-booted when the installation is complete.

1. If you haven't done so already, **install the software lock** (dongle) as illustrated previously.
2. If any applications are running on your computer, close them now.
3. Insert the TASKE Call Center Management Tools CD-ROM and click **Install** when the **Autorun** dialog box opens.
Or
If you have files from the TASKE web site, open the **Disk1** directory in the temporary area on your computer's local hard drive, then double-click the **Setup.exe** program icon.

Once the setup program is launched, the **Welcome dialog box** appears. This is a reminder to close any programs currently running on your PC before continuing the installation of the TASKE Setup program.

4. Choose the **Next >** button to allow the TASKE ToolBox installation to proceed.

The **Software License Agreement dialog box** appears.

5. Once you have read the Software License Agreement, if you agree, select the **Next >** button.

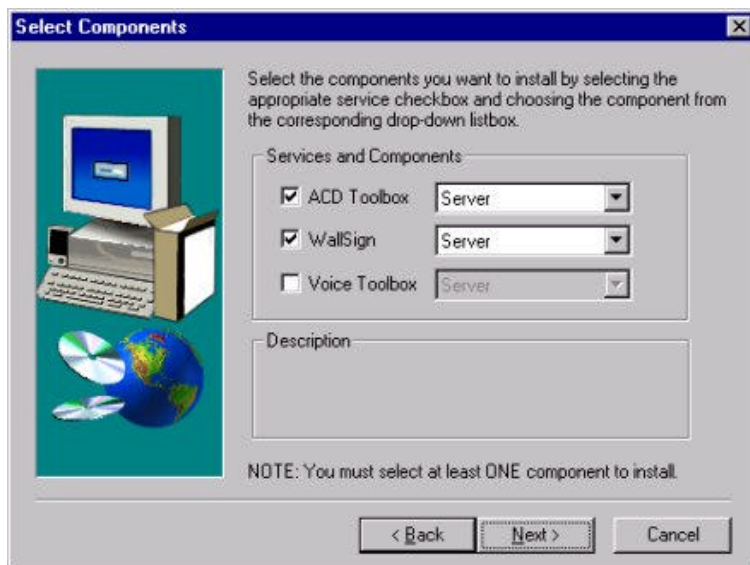
The **Setup Information dialog box** appears. Be sure to read the Setup information, and follow the directions it contains.

6. Once you have read the Setup Information, select the **Next >** button.

The **Operating System Requirements** dialog box appears. Make sure you have the recommended requirements before continuing with the installation.

7. Once you have read the System Requirements, select the **Next >** button.

The **Select Components dialog box** appears as below.



The Select Components dialog box contains drop-down choices for setting up the TASKE ToolBox components. You will see four choices for the component settings: Server, Supervisor, Enterprise Supervisor and Agent.

Server: This is the same as Server installation in previous versions. Server is a site that does the actual collection of the data and all the TASKE Clients are attached to a server.

Supervisor: A Supervisor is equivalent to a TASKE Client, and retains all the functionality of a client. All the clients are connected to a TASKE server through a network. They can run Reports, Monitor, Search, etc. over the network. A Supervisor can access the SiteData and SignData directories of a TASKE server which contain the results from data collection.

Enterprise Supervisor: An Enterprise Supervisor is a Supervisor (Client) that can perform all the functionality of a Supervisor over an Enterprise network (across multiple sites).

Agent: An Agent only has the permission to run the TASKE Agent Desktop Program over the network.

By default, the TASKE ToolBox and WallSign are installed, and the TASKE Voice Toolbox is not. Select the components you want to install by selecting the checkbox beside the appropriate component. You also need to choose a service for each selected component.

8. For ACD ToolBox choose **Server**.
9. For WallSign, choose **Server** (this will install WallSign Administrator (formerly Sign Configuration) and WallSign Server (formerly Sign Machine)).
10. If you are installing the Voice Toolbox, click the dialog box. Choose **Server** to setup the Server location of the TASKE Voice Toolbox.
11. Once you have completed setting your Select Components, select the **Next >** button.

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The **Locate TASKE License Files dialog box** appears. You need to provide the Path where your licensing information resides. By default, the Install program populates the text box with “a:\” as License Files are shipped on a 3.5” floppy disk.

12. Insert the disk labeled "License Info" into floppy drive A.
13. Once you have completed setting your License files location, select the **Next >** button.

The **Select Destination Directory dialog box** appears. By default, the Destination directory is populated with **c:\taske**. To change the install to a different directory, click on the **Browse** button and choose the directory you would like the TASKE software to be installed in. When you enter the Path where the files are to be stored, ensure there is plenty of disk space on the selected drive.

14. Once you have completed setting your Destination directory, select the **Next >** button.

The **Select SiteData Directory dialog box** appears. The Site Data Destination directory is a shared path located on the network that points to your ACD ToolBox Server PC. This setting specifies the location of the PBX database, and data files. If the directory is not specified correctly, client copies of the TASKE ToolBox will not be able to connect to the TASKE database to receive any real-time or historical information.

This setting by default will be set to a local directory, and should be installed locally, on the <c:> drive.

15. Enter the path for the SiteData directory. It should be **c:\taske\SiteData**

To change the path to a different directory, click on the **Browse** button and choose the directory your TASKE database and site data are installed in.

16. Once you have completed setting your Site Data Destination directory, select the **Next >** button.

The **Share SiteData Directory dialog box** appears. For clients to connect to the SiteData directory, the directory must be shared. The TASKE ToolBox install can perform this function when the directory is created.

17. If you would like the Site Data Destination directory to be shared, select the **Create Share** button. When your settings are complete, select the **Next >** button.

The **Select SignData Directory dialog box** appears. The SignData directory is a shared path located on the network that points to your WallSign Server PC. This setting specifies the location of the Sign Server configuration files. If the directory is not specified correctly, client copies of the TASKE WallSign will not be able to connect to the TASKE Sign Server and configure any readerboards.

This setting by default will be set to a local directory, and should be installed locally, on the <c:> drive.

18. Enter the path for the SignData directory. It should be c:\taske\SignData

To change the path to a different directory, click on the **Browse** button and choose the directory your TASKE database and sitedata are installed in.

19. Once you have completed setting your SignData Destination directory, select the **Next >** button.

The **Share SignData Directory dialog box** appears. For clients to connect to the SignData directory, the directory must be shared. The TASKE ToolBox install can perform this function when the directory is created.

20. If you would like the Sign Data Destination directory to be shared, select the **Create Share** button. When your settings are complete, select the **Next >** button.

*If you chose to install the TASKE Voice ToolBox, the **Select VoiceData Directory dialog box** appears.*

The VoiceData directory is a shared path located on the network that points to your TASKE Voice Server PC. This setting specifies the location of the Voice Server configuration files. If the directory is not specified correctly, client copies of the TASKE Voice tools will not be able to connect to the TASKE Voice Server and configure any of the voice channels.

This setting by default will be set to a local directory, and should be installed locally, on the <c:> drive.

21. Enter the path for the VoiceData directory. It should be **c:\taske\VoiceDataPath**

To change the path to a different directory, click on the **Browse** button and choose the directory your TASKE voicedata is installed in.

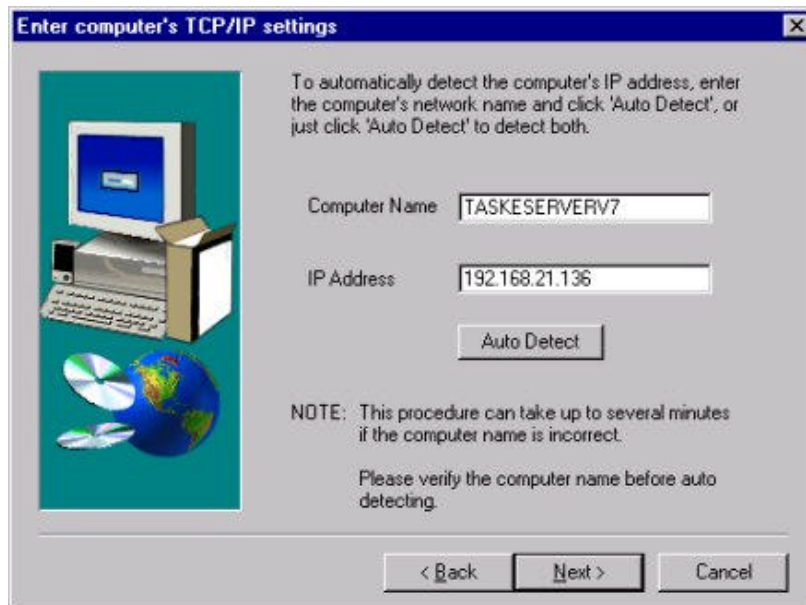
22. Once you have completed setting your VoiceData Destination directory, select the **Next >** button.

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The **Share VoiceData Directory dialog box** appears. For clients to connect to the VoiceData directory, the directory must be shared. The TASKE ToolBox install can perform this function when the directory is created.

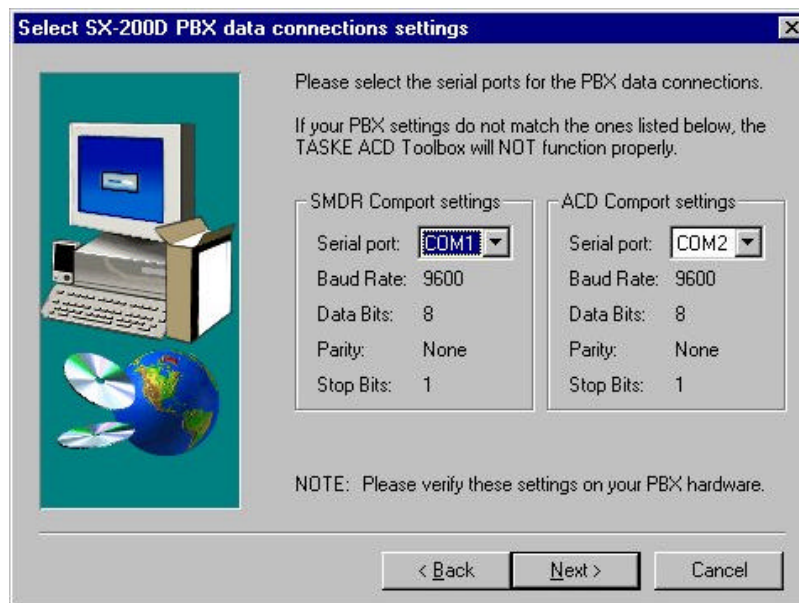
23. If you would like the Voice Data Destination directory to be shared, select the **Create Share** button. When your settings are complete, select the **Next >** button.

The **Local Server TCP/IP Settings dialog box** appears as below. Enter the network name and TCP/IP address of the server machine.



24. Once you have completed setting your local server name and TCP/IP address, select the **Next >** button.

The **Select SX-200D PBX data connections settings dialog box** appears as below:



You must select the Serial Port for both SMDR and ACD and verify that settings are identical to your PBX settings.

25. Once you have completed setting your serial ports for SMDR and ACD, select the **Next >** button.

*If you chose to install a WallSign, the **Select WallSign Serial Port Settings dialog box** appears.*

26. Once you have completed setting the serial port for the TASKE WallSign, select the **Next >** button.

The **Select Program Folder dialog box** appears. By default, the Setup program creates a Program Folder called "TASKE ToolBox v7". You may accept this, create a new folder, or choose from your Existing Folders List. Choose the name of the Program Group in which the TASKE ToolBox is to reside.

27. When you have chosen a folder for your TASKE files to reside in, select the **Next >** button.

The **Start Copying Files dialog box** appears. The Start Copying Files dialog box displays all of the settings that the user has selected in previous screens. These entries are not editable in this dialog box. If you wish to change any of the settings, click on the **< Back** button until you reach the dialog box for the settings you wish to change.

28. If you wish to accept the settings as they are displayed, click the **Next >** button.

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The **File Copying Progress dialog box** appears. The File Copying Progress dialog box displays the progress of the files being installed. You are not prompted for anything during this process.

The **Setup Complete dialog box** appears as below:



29. Select the **Finish** button to complete the installation of the TASKE Setup program. If you did not receive the patch file Information Dialog Box, reboot your computer before starting the TASKE software.

Chapter 4: ToolBox Installation for Supervisor/Client

Overview

This chapter describes the options and steps to follow while installing the TASKE ACD ToolBox client software on a network-connected computer running Windows 95, 98, or NT.

Requirements

TASKE ACD ToolBox client software may be installed on a computer running Microsoft Windows 95, Windows 98, or Windows NT 4.0 (with Service Pack 3 or later). For optimum performance, the computer should be equipped with a standard color monitor, mouse, keyboard, and the following software and hardware (or better):

TASKE ToolBox Hardware Requirements

Operating System	Processor: IBM®PC, IBM PS/2 or 100% Compatible
CPU	Pentium II - 266 MHz (min)
Required Software	Windows 95, 98 or Windows NT 4.0 SP4 Internet Explorer 4.0 or later (required to view Online Help)
Memory (RAM)	32 MB (min)
Monitor	Super VGA or Better
Disk Space	4.0 GB (min)
Floppy Drive	3.5" HDD
Communications Ports	2 RS-232 Communications Ports (Co-Processor such as DIGIBOARD)
Printer Ports	1 Parallel Printer Port
Printer	1 Laser Printer
Mouse	Bus , serial, or PS/2 mouse
Network	Network Card with Winsock 1.1 compliant TCP/IP Stack

TASKE Voice ToolBox Hardware Requirements

TASKE ACD ToolBox	Version 7
Required Software	Windows 95, 98 or Windows NT 4.0 SP4 Internet Explorer 4.0 or later (required to view Online Help)
RAM	32 MB
Disk Space	2.0 GB
Video	Super VGA Monitor with PCI Video Card
Network	Network card with Winsock 1.1 compliant TCP/IP stack
Computer	Pentium II - 266MHz (min), 4 ISA slots
Sound Card	SoundBlaster or compatible (for Voice Config)

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Voice Card	Dialogic D/41D,D/41H, Dialog/4 or D/41E (UK version) See Appendix C
Floppy Drive	3.5" HDD
Communication Ports	2 RS-232 communication ports
Mouse	Bus , serial, or PS/2 mouse
Backup Power Supply	Mini UPS (for Voice Machine only)

Assumptions

The installation procedure assumes that:

- the TASKE software lock (dongle) is installed on the TASKE Server (see “Installing the TASKE Software Lock” in Section 3).
- Microsoft file and printer sharing services and TCP/IP network protocol services have been installed and tested on the client PC (see “Network Considerations” in Section 1).
- a logical network drive has been mapped to the TASKE database (**ServerPath** directory) from the Desktop Sign PC (see “Mapping a Network Drive” in Appendix B).

Software Installation

Follow the procedure below to install TASKE ACD ToolBox client software from the TASKE Call Center Management Tools CD-ROM, or from files that have been downloaded from the TASKE web site.

Before You Begin

To ensure a successful, first-time installation, have the following items on hand:

- TASKE Call Center Management Tools CD-ROM, or decompressed files from the TASKE web site.
- Administration floppy disk.

Important: The **readme.txt** file on the CD-ROM contains important, last-minute information about TASKE Call Center Management Tools. Before you start the installation procedure, please review the **readme.txt** file — it can be opened on the CD-ROM using a text editor.

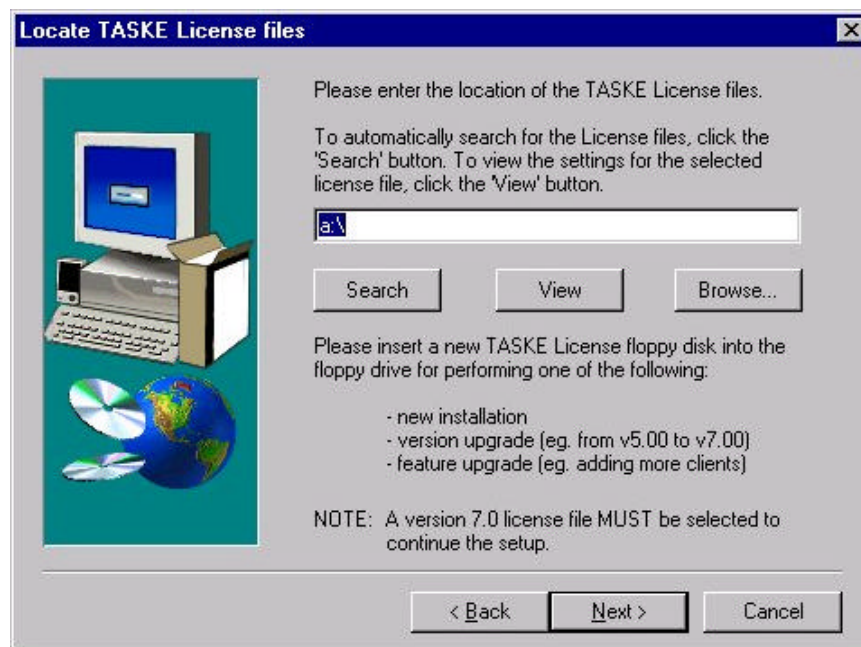
If You are Upgrading

When you install the TASKE ACD ToolBox client software, any existing program files on the client PC are overwritten.

Installing the TASKE ToolBox Client Software

1. If any applications are running on the client PC, close them now.
2. Insert the TASKE Call Center Management Tools CD-ROM and click **Install** when the **Autorun** dialog box opens.
Or
If you have files from the TASKE web site, open the **Disk1** directory in the temporary area on your computer's local hard drive, then double-click the **Setup.exe** program icon.

If this is a first time installation, or if you are performing an upgrade and the license files can not be found, you are requested to provide licensing information. If licensing information is required, the dialog box illustrated below appears.



You need to provide the Path where your licensing information resides.

3. Insert the disk labeled "License Info" into floppy drive A.
4. Type the drive letter **A:**.
5. Select the **Next >** button.

Note If you are not presented with the screen illustrated above, then the TASKE software has already read your licensing information from the previous installation and lets you proceed.

The **Welcome dialog box** appears.

This is a reminder to close any programs currently running on your PC before continuing the installation of the TASKE Setup program.

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6. Choose the **Next >** button to allow the TASKE ToolBox installation to proceed.

The **Software License Agreement dialog box** appears.

7. Once you have read the Software License Agreement, if you agree, select the **Next >** button.

The **Setup Information dialog box** appears.

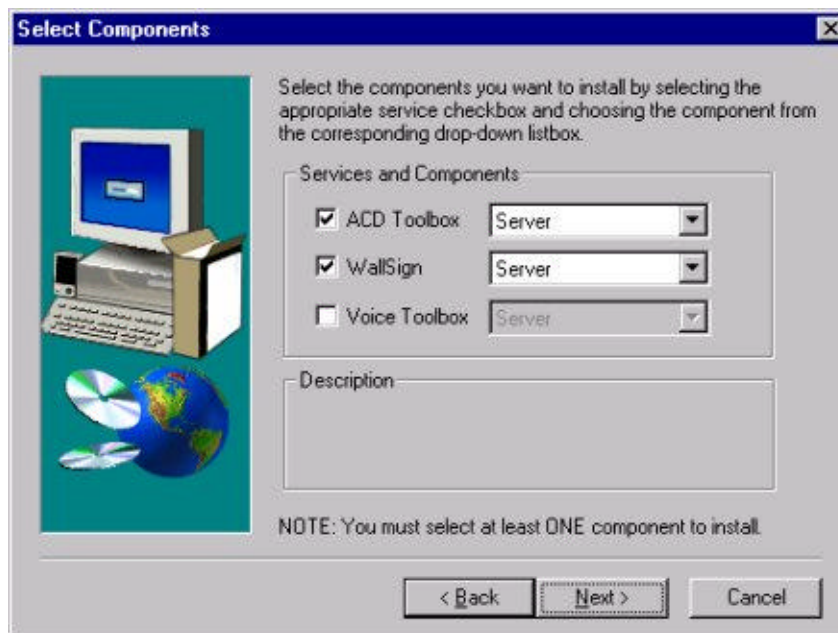
Be sure to read the Setup information, and follow the directions it contains.

8. Once you have read the Setup Information, select the **Next >** button.

The **Operating System Requirements** dialog box appears. Make sure you have the recommended requirements before continuing with the installation.

9. Once you have read the System Requirements, select the **Next >** button.

The **Select Components dialog box** appears as below:



The Select Components dialog box contains drop-down choices for setting up the TASKE ToolBox components. You will see four choices for the component settings: Server, Supervisor, Enterprise Supervisor and Agent.

Server: This is the same as Server installation in previous versions. Server is a site that does the actual collection of the data and all the TASKE Clients are attached to a server.

Supervisor: A Supervisor is equivalent to a TASKE Client, and retains all the functionality of a client. All the clients are connected to a TASKE server through a network. They can run Reports, Monitor, Search, etc. over the network. A Supervisor can access the SiteData and SignData directories of a TASKE server which contain the results from data collection.

Enterprise Supervisor: An Enterprise Supervisor is a Supervisor (Client) that can perform all the functionality of a Supervisor over an Enterprise network (across multiple sites).

Agent: An Agent only has the permission to run the TASKE Agent Desktop Program over the network.

By default, the ACD ToolBox and WallSign are installed, and the Voice Toolbox is not. Select the components you want to install by selecting the checkbox beside the appropriate component. You also need to choose a service for each selected component.

10. For ACD ToolBox choose **Supervisor**.
11. For WallSign, choose **Client**.
12. If you are installing the Voice Toolbox, click the dialog box. Choose **Client** to setup the TASKE Voice Toolbox.
13. Once you have completed setting your Select Components, select the **Next >** button.

The **Select Destination Directory dialog box** appears. By default, the Destination directory is populated with `c:\taske`. To change the install to a different directory, click on the **Browse** button and choose the directory you would like the TASKE software to be installed in. When you enter the Path where the files are to be stored, ensure there is plenty of disk space on the selected drive.

13. Once you have completed setting your Destination directory, select the **Next >** button.

The **Select SiteData Directory dialog box** appears. The Site Data Destination directory is a shared path located on the network that points to your ACD ToolBox Server PC. This setting specifies the location of the PBX database, and data files. If the directory is not specified correctly, client copies of the TASKE ToolBox will not be able to connect to the TASKE database to receive any real-time or historical information.

14. This setting should be `\\NameofTaskeServerMachine\SiteData`

To change the path to a different directory, click on the **Browse** button and choose the directory your TASKE database and site data are installed in.

15. Once you have completed setting your Site Data Destination directory, select the **Next >** button.

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The **Select SignData Directory dialog box** appears. The SignData directory is a shared path located on the network that points to your WallSign Server PC. This setting specifies the location of the Sign Server configuration files. If the directory is not specified correctly, client copies of the TASKE WallSign will not be able to connect to the TASKE Sign Server and configure any readerboards.

16. This setting should be `\\NameofTaskeServerMachine\SignData`

To change the path to a different directory, click on the **Browse** button and choose the directory your TASKE database and site data are installed in.

17. Once you have completed setting your Sign Data Destination directory, select the **Next >** button.

*If you chose to install the TASKE Voice ToolBox, the **Select VoiceData Directory dialog box** appears.*

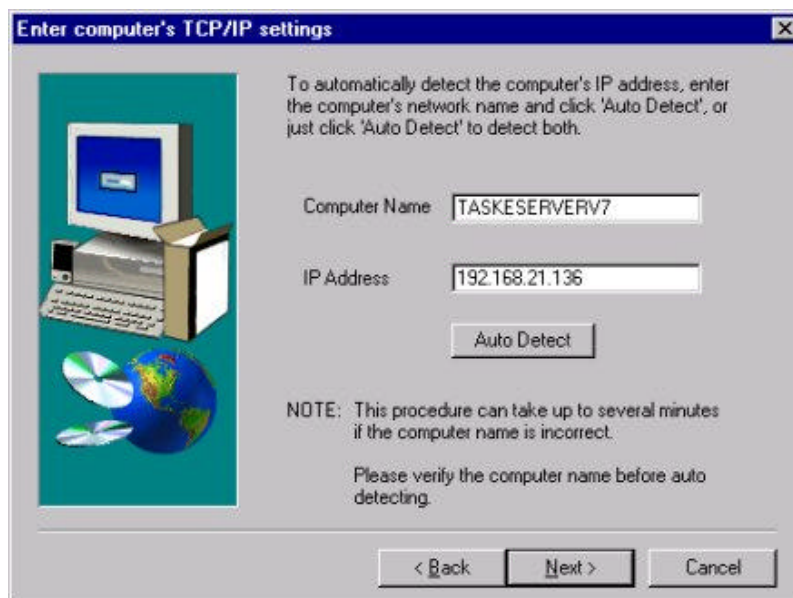
The VoiceData directory is a shared path located on the network that points to your TASKE Voice Server PC. This setting specifies the location of the Voice Server configuration files. If the directory is not specified correctly, client copies of the TASKE Voice tools will not be able to connect to the TASKE Voice Server and configure any of the voice channels.

18. Enter the path for the VoiceData directory. It should be [\\NameofTaskeServerMachine\VoiceData](#)

To change the path to a different directory, click on the **Browse** button and choose the directory your TASKE voice data is installed in.

19. Once you have completed setting your VoiceData Destination directory, select the **Next >** button.

The **Enter computer's TCP/IP settings dialog box** appears as below:



The computer's TCP/IP setting specifies the name of the computer, and its TCP/IP address. Enter the name and TCP/IP address of your computer. If you enter the incorrect information, or are not sure of the information, click the "Auto Detect" button. This will force the TASKE ToolBox setup to find the correct information before proceeding.

20. Once you have completed setting your Server Name and TCP/IP address, select the **Next >** button.

*If you chose to install a WallSign, the **Remote Wall Sign Server TCP/IP settings dialog box** appears.*

21. Once you have completed setting your WallSign Server Name and TCP/IP address, select the **Next >** button.

*If you chose to install the Voice ToolBox, the **Remote Voice Server TCP/IP settings dialog box** appears.*

22. Once you have completed setting your Voice Server Name and TCP/IP address, select the **Next >** button.

The **Select Program Folder dialog box** appears. By default, the Setup program creates a Program Folder called "TASKE ToolBox v7". You may accept this, create a new folder, or choose from your Existing Folders List. Choose the name of the Program Group in which the TASKE ToolBox is to reside.

23. When you have chosen a folder for your TASKE files to reside in, select the **Next >** button.

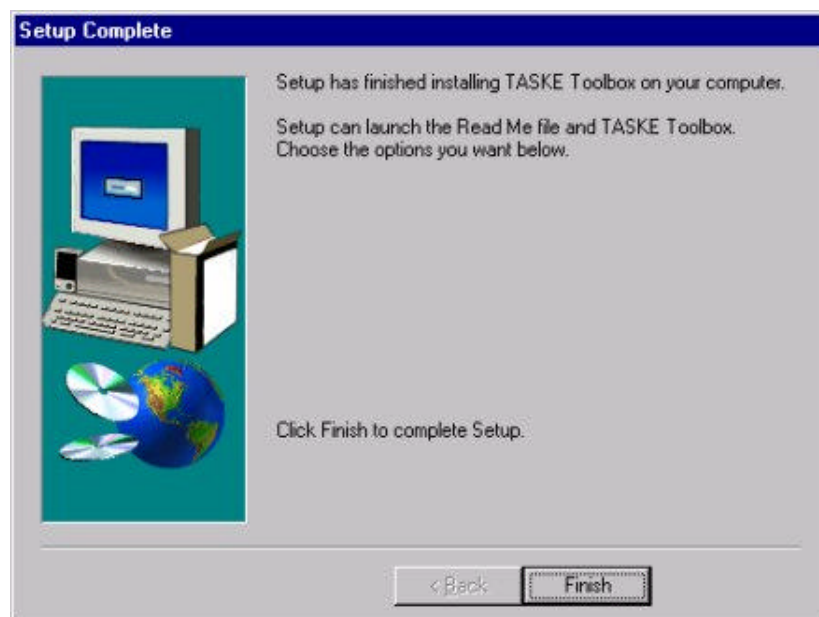
The **Start Copying Files dialog box** appears. The Start Copying Files dialog box displays all of the settings that the user has selected in previous screens. These entries are not editable in this dialog box. If you wish to change any of the settings, click on the < **Back** button until you reach the dialog box for the settings you wish to change.

24. If you wish to accept the settings as they are displayed, click the **Next >** button.

The **File Copying Progress dialog box** appears. The File Copying Progress dialog box displays the progress of the files being installed. You are not prompted for anything during this process.

The **Setup Complete dialog box** appears as below:

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25. Select the **Finish** button to complete the installation of the TASKE Setup program. If you did not receive the patch file Information Dialog Box, reboot your computer before starting the TASKE software.

Appendix A: PBX Programming

This appendix describes the hardware configuration and programming required of the MITEL 200 system to support TASKE Call Center Management Tools. PBX programming is required for both the TASKE ToolBox and the TASKE Voice ToolBox.

TASKE ToolBox PBX Configuration

This overview is intended to show you the necessary hardware connectivity and programming for the MITEL SX-200 PBX. The PBX must be programmed with specific settings in order for the TASKE Software to receive the necessary SMDR and Agent Shift Summary data records. The VT100 ACD Monitor is optional.

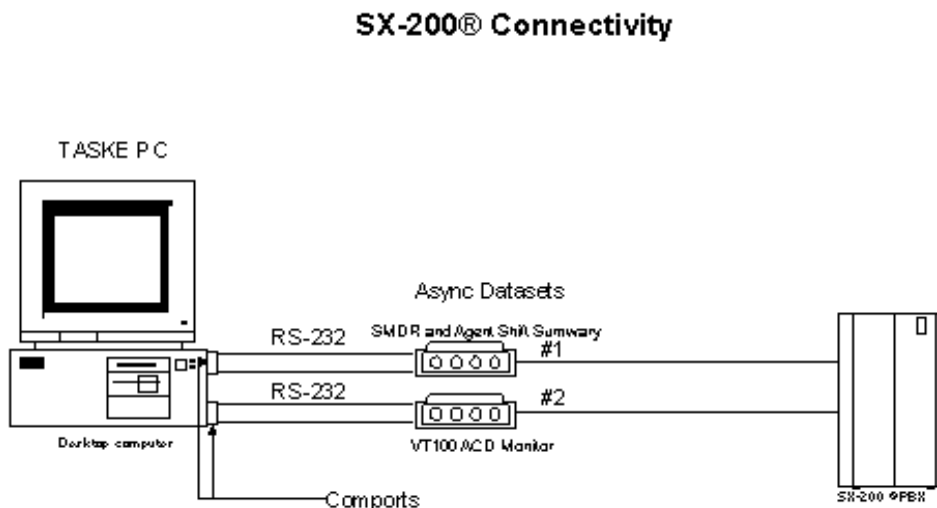
The hardware requirements for connectivity with the SX-200 are as follows.

- A TASKE PC with an Available Comport (or 2 if using the VT100 ACD Monitor Option)
- RS-232 Cable (or 2 if using the VT100 ACD Monitor Option)
- An Asynchronous Dataset for SMDR And Agent Shift Summary Data Records
- An Asynchronous Dataset for VT100 ACD Monitor (Optional)
- A SX-200® PBX with a DNIC Line Card with the ACD Option

MITEL SX-200 Connectivity

FIGURE 1-1: SX-200 Connectivity, shows the connections between the MITEL SX-200 PBX and the TASKE PC.

FIGURE 1-1: SX-200 Connectivity



Programming Required For Dataset Connections

The following 5 Dataset Connections forms must be programmed.

1. Class of Service - Setting SMDR Recording Options
2. System Options - Setting ACD Option for SMDR Records, disable 5 digit SMDR.
3. Trunk Groups - Setting Outgoing SMDR Recording Options
4. Directed I/O - Setting SMDR and Agent Shift Records to the dataset connected to TASKE.
5. ACD Reports - Setting Agent Shift Records to Enabled

1. Class Of Service

The Class of Service is Form 03 - COS Define. The option name SMDR - Record Incoming Calls must be enabled for all COS of services. All Class Of Services must be set in the entire PBX switch.

2. System Options

The Systems Options is Form 04 - System Options/System Timers. The option ACD Reports must be enabled. The option 5-Digit SMDR must be disabled because the TASKE ToolBox is using 4-Digit numbering.

3. Trunk Options

The Trunk Options is Form 16 - Trunk Groups. The softkey SMDR/NO SMDR must be enabled to SMDR.

4. Directed I/O

The Directed I/O is Form 34 - Directed I/O. For the Dataset #1, the softkey SMDR must be enabled with a printout type option of Autoprint and a printout guaranteed set to NO. The softkey ACD AGT SUM must be enabled with a printout type option of Autoprint and a printout guaranteed set to NO.

NOTE The LDN for the Dataset used for the SMDR/Agent Shift should not have any Directed I/O set.

This directs SMDR and ACD Agent Summary records (also called ACD Agent Shift Records) to the dataset connected to the sComOptions comport of the TASKE ACD ToolBox.

5. ACD Reports

You must login to the Maintenance Terminal with the correct USERNAME and PASSWORD. The softkey ACD_REPORTS must be selected followed by the softkey function SET. The ACD Report parameter AGENT_SHIFT must be enabled and can be verified as enabled by the softkey function SHOW.

The VT100 ACD Monitor

The VT100 Terminal is a dumb terminal which enables maintenance and/or CDE programming for the SX-200 Digital telephone switch. The TASKE ToolBox can be used with the VT100 Terminal and requires the following settings to be made in the MITEL SX-200 Digital CDE Forms. For the dataset, program the 1103 dataset with the circuit descriptor settings outlined below.

Form 11* - DATA CIRCUIT DESCRIPTOR OPTIONS

Guard Timer	2 seconds
Minimum Baud Rate	9600
Default Baud Rate	9600
Maximum Baud Rate	9600
Always Use Default Baud Rate When Called	Yes
DTR Off Disconnect Timer	5 seconds
DTR To CTS Delay Timer	100 msec increment
DTR Forced High	Yes
RTS Forced High	Yes
DSR is Held High When Device Is Idle	No
CTS is Held High When Device Is Idle	No
Session Inactivity Disconnect Timer	0 minutes
Originate A DTRX Call With A Low > High Transition Of DTR	No
Action Taken if the Idle DTE has DTR Low (Auto-Answer)	Refuse
Pooled Modem Communication Established Indicator	DCD
First Modem Tone	2025
Second Modem Tone	2025
ASYNC:Keyboard Origination Allowed(Autobaud)	Yes
ASYNC:ADL Autobaud	Enable
ASYNC: Flow Control	XON/XOFF
ASYNC: XON Character	17
ASYNC: Parity	None
ASYNC: XOFF Character	19
ASYNC: Break Key Function	Transparent
ASYNC:PBX Attention Character	0
ASYNC: Character Length	8
ASYNC:Number Of Stop Bits	1
ASYNC:Autobaud To Host Character 1	13
ASYNC:Autobaud To Host Character 2	0
ASYNC:Delay Between Autobaud Characters	100

DS2100:Operating Mode	ASYNC
SYNC:Rate Adaption Scheme	MINET
SYNC:Clock Source	INTERNAL

A VT100 Terminal can be connected to the TASKE ToolBox via the dataset to a computer comport. The TASKE ToolBox can receive VT100 Terminal information through either the TASKE Sign program or the TASKE VT100 Terminal program. If only one VT100 Terminal dataset is attached to the computer, only one program can use the VT100 Terminal dataset at once. If two VT100 Terminal datasets are attached to the TASKE ToolBox, both the TASKE Sign program and the VT100 Terminal program can each have their own individual VT100 Terminal dataset.

The TASKE ToolBox has two programs working with the VT100 Terminal. The TASKE VT100 Terminal program emulates a dumb terminal but instead uses the PC computer. All commands and functions are available. The TASKE Sign program works the same as the TASKE VT100 Terminal program except does more. The TASKE Sign program uses the VT100 Terminal to update the reader board variables. TASKE needs the VT100 Terminal to be in either the System Activity screen or the Group Summary screen. The VT100 Terminal displays green on the display when TASKE is accessing the VT100 Terminal for the TASKE Sign variables.

The TASKE ToolBox has settings which are needed for VT100 Terminal connectivity. The TASKE INI File Editor allows you to set various options. Under the comports folder is the pulldown section "Choose Service" The settings VT100 and Sign VT100 can be set to the proper comport, baud rate, data bit, parity and stop bits. The VT100 is the setting for the TASKE VT100 program. The SIGN VT100 is the setting for the VT100 Terminal for the TASKE Sign program. Under the TASKE Sign folder is the TASKE Sign Settings section which has a checkbox for the Use System Screen. If the checkbox is enabled, the VT100 Terminal must be in the System Activity screen in order for the TASKE Sign program to update reader board variables, otherwise, you must be in the Group Summary screen.

Note If the VT100 Terminal seems to have text missing, use the Control - W command to refresh the screen.

Once everything is connected, you can get into the VT100 Terminal by pressing enter a few times. The welcome message appears followed by the menu options. Select option 1 for the VT100 Terminal. Type ACD MON followed by the password 1000. You can do maintenance or change CDE programming. If you are using the TASKE Sign program then make sure you are in the right screen (System Activity or Group Summary screen).

Appendix B: Networking Issues

Configuring Microsoft Software

This appendix provides guidelines for setting up and configuring PCs on a Microsoft Network to support TASKE Call Center Management Tools. Although every attempt has been made to provide accurate instructions, this appendix is provided as a courtesy supplement (not a replacement) to the Microsoft operating system documentation, and as such, this appendix may contain unintentional omissions or inaccuracies.

If you are in doubt, consult the Microsoft documentation or Microsoft Online Help. If you experience a problem configuring the Windows operating system or setting up your Microsoft Network, please contact your network administrator or Microsoft Technical Support directly.

Configuring a Parallel Port Under Windows 95

1. Select **Settings:Control Panel**, and then choose **System**.
2. On the **Device Manager** tab, select the printer port.
3. On the **Driver** tab, choose the **Change Driver** button.
4. Choose the **Show All Devices** option.
5. In the Manufacturers box, click Standard Port Types.
6. In the **Models** box, click **Printer Port**, and then click **OK**.

Note: In the next Step, you will be prompted for the Windows 95 CD-ROM. If you aren't prompted for the Windows 95 CD-ROM, reconfigure the ECP port as a standard port using the computer's CMOS settings as described above.

7. When prompted for the Windows 95 CD-ROM:
 - i) Insert the CD-ROM in the drive.
 - ii) Specify the following path to the **Lpt.vxd** file:

```
<cd-rom drive>:\drivers\printers\lpt
```

Note: If you don't have a Windows 95 CD-ROM, you can obtain the required **Lpt.vxd** file from the Microsoft Windows 95 Service Pack 1.

8. Click **OK**.
9. Verify that the **Lpt.vxd** file is version 4.00.503 or higher (double-click the port in **Device Manager**, and then click the **Device** tab). If the **Lpt.vxd** file is version 4.00.950, you will have to complete the following steps to copy the **Lpt.vxd** file to the Windows System folder manually.

- i) In Windows **Explorer**, navigate to the Windows System folder.
 - ii) Rename the existing **Lpt.vxd** file to **Lpt.xxx**.
 - iii) Drag the **Lpt.vxd** file from the **Drivers\Printer\Lpt** folder on the Windows 95 CD-ROM to the Windows System folder on your computer.
10. Check the **Resources** tab in **Printer Port** properties to verify that the settings are correct:
- If the **Direct Memory Access** value is displayed for a setting, clear the **Use Automatic Settings** option, and then change the value in the **Settings Based On** box until the **Direct Memory Access** value is no longer displayed. When you are prompted to confirm that you have modified the settings manually, click **Yes**.
11. When you are prompted to restart your computer, restart Windows 95.

Adding File & Printer Services under Windows 95/98

If you don't have file and printer services installed, you might need the Windows 95 or Windows 98 CD-ROM to complete this procedure.

1. Using the Windows **Explorer** on the machine that will be used to store TASKE data, select the **Network Neighborhood** icon and right-click.
2. Choose **Properties**. The **Network** dialog box opens.
3. On the **Configuration** tab, click **Add**. The **Select Network Component Type** dialog box opens.
4. Select **Service** and click **Add**. The **Select Network** dialog box opens.
5. In the **Manufacturers** list, select **Microsoft**.
6. In the **Network Services** list, click **File and Printer Sharing for Microsoft Windows**.
7. Click **OK**. The **Network** dialog box is redisplayed with a **File and printer sharing for Microsoft Windows** item in the list of installed network components.
8. Click **File and Print Sharing**. The **File and Print Sharing** dialog box opens.
9. Select the **I want to be able to give others access to my files** option, and then click **OK**.
10. Click **OK** to close the **Network** dialog box. The **System Settings Change** dialog box opens, prompting you to restart the computer.
11. Click **Yes** to restart the computer.

Windows 95/98 Sharing and Permissions

To set up taske directory sharing on a Windows 95/98 PC:

1. Using the Windows **Explorer** on the machine that will be used to store TASKE data, select the **taske** directory and right-click.
2. Choose **Properties**. The **Properties** sheet for the selected directory opens.
3. On the **Sharing** tab, select the **Shared As** option.
4. In the **Share Name** box, type a name that will be used to identify the share assignment (also known as a share name). For example, "TASKE-PBXdatabase". Make a note of whichever share name you use, as you will need it later on when you map a network drive to this computer from another networked computer.
5. In the **Name** list, select **The World** and then click **Edit**. The **Change Access Rights** dialog box opens.
6. Verify that the **Full Access Rights** option is selected, then click OK.
7. Click **Apply** and then **OK** to close the **ServerPath** directory's **Property** sheet.

To set Windows 95 file/directory permissions on the taske subdirectories:

1. Double-click the **taske** directory.
2. In the right pane, select the **SignData**, **SiteData**, and **VoiceData** subdirectories, and then right-click.
3. Choose **Properties**. A **Properties** sheet that is common to the selected directories opens.
4. In the **Attributes** area on the **General** tab, select the **Read-only** option.
5. Click **Apply** and then click **OK**.

Windows NT Sharing and Permissions

To set up taske directory sharing on a Windows NT PC:

1. Using the Windows NT **Explorer** on the machine that will be used to store TASKE data, select the **ServerPath** directory and choose **File:Properties**. The property sheet for the **ServerPath** directory opens.
2. Click the **Sharing** tab.
3. Select the **Share As** option, and in the **Share Name** box, type a name that you will use to identify the share assignment (also known as a share name). For example, "TASKE-PBXdatabase". Make a note of whichever share name you use, as you will need it later on when you map a network drive to this computer from another networked computer.
4. Click **Permissions**. The **Access Through Share Permissions** dialog box opens.
5. In the **Name** list, verify that **Everyone** is permitted **Full Control**. If a different value is displayed, select **Full Control** in the **Type of Control** box.
6. Click **OK** to close the **Access Through Share Permissions** dialog box.
7. Click **Apply** and then click **OK** to close the **ServerPath** directory's **Property** sheet.

To set Windows NT file/directory permissions on the taske subdirectories:

1. Double-click the **ServerPath** directory.
2. Select the **User** subdirectory and right-click.
3. Choose **Properties**.
4. On the **Security** tab, click the **Permissions** button. The **Directory Permissions** dialog box opens.
5. Verify that the **Replace Permissions on Existing Files** option is selected.
6. Select the line corresponding to **Everyone**.
7. In the **Type of Access** box, choose **Special Directory Access**.
8. In the **Special Directory Access** dialog box, select the **Read** option — clear all other options.
9. Click **OK** until all dialog boxes have been closed.

10. Select the **ACD** subdirectory and right-click.
11. Repeat Steps 3 through 7 for the **ACD** subdirectory.
12. In the **Special Directory Access** dialog box, select the **Read** option and the **Write** option — clear all other options.
13. Click **OK** until all dialog boxes have been closed.
14. Repeat Steps 10 through 13 for the **LOGS** and **SMDR** subdirectories.

Mapping a Network Drive

All network-connected PCs running TASKE software need access to the TASKE database. When you install TASKE software on a network-connected PC, you are required to specify where the TASKE data files reside.

When you installed the TASKE ACD ToolBox, you defined the **ServerPath**, which points to the TASKE database. The procedure below explains how to map a network drive to the **ServerPath** directory.

Perform this procedure on the PC requiring access to the TASKE database.

To map a drive to the taske directory:

1. Using Windows Explorer, choose Tools:Map Network Drive. The Map Network Drive dialog box opens.
2. In the Drive box, select an unused, logical drive letter (e.g. T).
3. In the Path box, enter the logical network node name of the computer where the TASKE data resides and include the share name that you assigned previously to the ServerPath directory (e.g. <\\TASKEFILESERVER\\TASKE-PBXdatabase>).
4. Select the **Reconnect at Logon** option.
5. Click **OK**.

Appendix C: TASKE Voice ToolBox

Installing Dialogic Boards

The TASKE Voice ToolBox currently supports the following four models of Dialogic Voice Boards.

- D/41D (full-size card)
- D/41H (half-size card)
- Dialog/4 (half-size card)
- D/41E (UK full-size card)

The installation procedures are the same for the D/41D, D/41H, and Dialog/4, while the D/41E requires different installation procedures.

Dialogic D/41D, D/41H, and Dialog/4

The following steps provide a quick overview of the Quick Installation card.

Note If you have purchased the D/41D card, make certain there is enough space in the computer's case for the card and ensure there is not interfere with the proper cooling of the CPU. A Quick Installation card is included with both versions of the Dialogic voice cards and should be read carefully. The reference card explains how to configure and install the voice card in a PC.

1. If you are installing 1 voice card, ensure that JP7 has a jumper installed across its two pins. If you are installing multiple voice cards, remove jumper JP7 from all but one of the voice cards.
2. The D/41D and D/41H voice cards require a single hardware interrupt request line (IRQ), with the default being IRQ 3.

The table below outlines Jumper JP1 sets the IRQ, as well as the computer resource which typically uses each IRQ. Before attempting to use an IRQ for the voice card, verify that the IRQ is not being used by another card in the system.

IRQ Settings

Pin Position	IRQ	Resource
1	2/9	Video card
2	3 (default)	COM 2
3	4	COM 1
4	5	LPT2 / Sound
5	6	Floppy Disk
6	7	LPT1

3. Each voice card requires a section of the computer's upper memory for proper functioning. To set the memory upper address for a card, both the base memory address and the offset memory address must be specified.
4. To set the base memory address, set jumpers JP5 and JP6 to one of the base addresses listed in the table below.

Base Memory Addresses

JP5	JP6	Base Memory Address
out	out	D0000H (default)
in	out	A0000H
out	in	C0000H
in	in	B0000H

5. To set the offset memory address, set the dip switches at SW1 to one of the offset addresses listed in the table below.

Offset Memory Addresses

SW 1			Offset Memory Address
1	2	3	
off	off	off	0000H
off	off	on	2000H
off	on	off	4000H
off	on	on	6000H
on	off	off	8000H
on	off	on	A000H
on	on	off	C000H
on	on	on	E000H

6. To determine which upper memory address the board is using, simply add the base and offset memory addresses together.

For example, if the base memory address is D0000H (H means hexadecimal) and the offset memory address is 8000H, then the upper memory address being used is D8000H.

7. Verify that other cards in your system are not using the same upper memory address as the voice cards.

Note The memory address range from D0000H to DFFFFH is usually free, but other cards may attempt to use memory addresses within that range.

In addition, recall that each voice card must use a unique upper memory address. Each card can, however, use consecutive memory addresses.

For example, a system could have four D/41D, Dialog/4, or D/41H voice cards with the following addresses: D0000H, D2000H, D4000H, and D6000H. However, if a network card uses memory address D6000H, the voice card at that memory address would have to be moved to another address (i.e. DA000H, DC000H, or DE000).

Dialogic D/41E

The D/41E voice card comes as a full length card. Make certain there is enough space in the computer's case for the card and ensure it does not interfere with the proper cooling of the CPU.

A Quick Installation instruction card is included with the D/41E card. It should be read carefully. The reference card explains how to configure and install the voice card in a PC.

Select a unique board ID number for each voice card by turning the rotary switch SW1 to the desired hexadecimal number. The numbers range from 0H to FH (0 to 15 in decimal).

All D/41E voice cards share IRQ 3 and upper memory address D0000H. Therefore, before attempting to use these cards, it is important to verify that the IRQ and the upper memory address are not being used by another card in the system.

Installing ONS Ports from the PBX

The TASKE Voice ToolBox requires a separate ONS port connected to each channel of each Dialogic Voice Card that is to be used as a RAD.

D/41D, Dialog/4, and D/41H

These voice cards have two RJ-14 jacks on the back of the card. Each RJ-14 jack provides a connection for two voice channels as illustrated in the table below.

D/41E

The voice card has four RJ-11 jacks on the back of the card. Each RJ-11 jack provides a connection for a single voice channel as illustrated below.

Voice Jack Connections

