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# Installation Guide for TASKE Applications

For Toshiba® Strata CIX Telephone Systems

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## About this Guide

TASKE applications provide reporting, monitoring, and analysis solutions that simplify telephone system management. TASKE applications provide detailed information on call history, call handling, and resource usage.

# Chapter 1 TASKE Architecture

In addition to the telephone system, the TASKE architecture includes server and client components.

## Server Components

Server components include TASKE servers and TASKE applications, and Microsoft Internet Information Server (IIS).

TASKE servers include:

- TASKE Information Server and TASKE Collector

Together, these servers ensure that the data supplied by the telephone system is collected, stored and properly dispersed to other TASKE components. The Information Server also manages connections, the site license, and other server-related administrative actions.

- TASKE Upgrade Server

This server checks the version number of each client attempting to connect to the Information Server. If the version of the client application does not match the version of the Information Server, the Upgrade Server sends a message to the user of the client application that an upgrade is necessary to connect and provides a link to the installation.

- TASKE Integration Server

This server facilitates the integration of licensed, third-party applications with TASKE applications. Check your license file to determine if you are licensed for third-party applications.

- TASKE Add-On Server

This server handles data transfer between the Information Server and the TASKE Web Server.

- TASKE Web Server

This server handles data transfer between the Add-On Server and Microsoft IIS Web Server.

TASKE applications include TASKE Console for managing TASKE servers. For example, from TASKE Console, you start and stop servers and define properties, such as whether servers start automatically. Other TASKE applications, including wizards, help manage your TASKE installation. For example, TASKE Administrator manages resources and configures operation. The TASKE Database Update Wizard is used to automatically update the TASKE database with telephone system resources.

For more information about TASKE servers and applications, see the *TASKE Server online help*.

## Microsoft Internet Information Server

Microsoft Internet Information Server (IIS) hosts the TASKE website and handles requests for web pages from TASKE web clients. Within the TASKE environment, Microsoft IIS is referred to as the World Wide Web Publishing service, and can be started and stopped from TASKE Console.

## Client Components

TASKE client components use data collected by TASKE servers for viewing and reporting on the status of the contact center, as well as analysis of the logged data.

TASKE clients include:

- TASKE web interface

This web interface allows supervisors to view real-time and historical data about resources such as agents, queues, and trunks in a web browser. Supervisors can view call activity in real-time, generate call activity reports, and view a customer's call experience from start to finish.

**Note:** Only a web browser is required to use the TASKE web interface. No TASKE software is installed on supervisors' computers.

- TASKE Desktop

This application allows agents and supervisors to view real-time and historical data from their own computers. This information keeps these users aware of performance levels and queue statuses, helping them make educated decisions on how and when intervention or other actions are required. Users can customize the content shown by TASKE Desktop and the presentation of this content.

- TASKE Administrator

This application maintains the TASKE database, its files, and application settings. Only users who have been given permission by the TASKE system administrator can access TASKE Administrator.

- TASKE DisplayCentral and DisplayCentral Designer

An innovative alternative to wallsign displays, DisplayCentral enables communication throughout your contact center using plasma, LCD, or projector technologies. Use DisplayCentral Designer to design a layout of the content you want to communicate using DisplayCentral, including agent and queue statuses, real-time statistics, and other information, that is important to your business.

In addition to these clients, TASKE open database connectivity (ODBC) drivers import TASKE Contact data into third-party applications such as Microsoft® Access and Crystal Decisions Crystal Reports®. The drivers enable connectivity between TASKE data files and the third-party application, which must also be installed on the same computer as the ODBC drivers.

For information about a TASKE client component, see its online help.

## Deployment Options

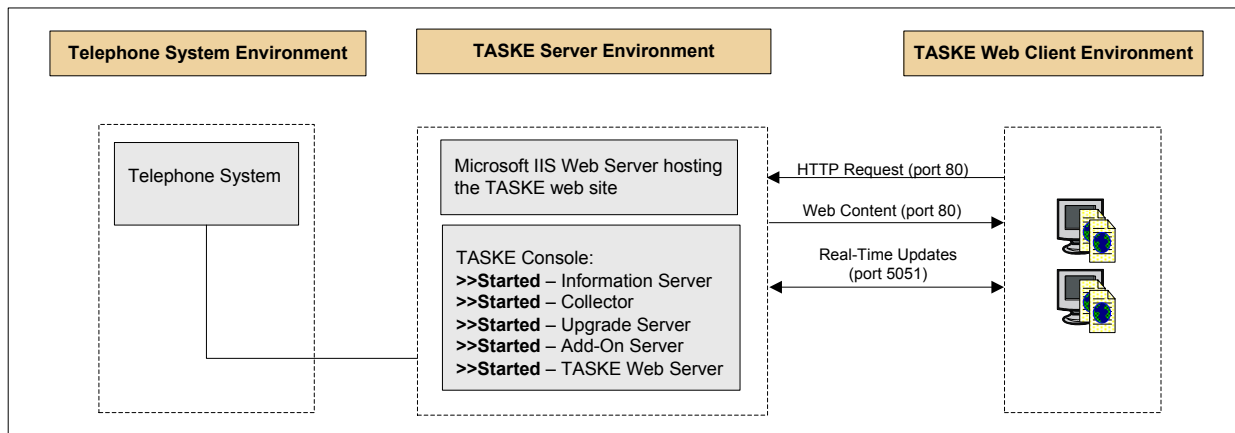
TASKE components reside on a single server. For users of client components other than the TASKE web interface, the appropriate components are installed on individual user's computers, as required. The TASKE web interface does not require installation of TASKE software on users' computers. Only a web browser is required.

If you have Enterprise licensing, you can deploy the TASKE installation across remote sites.

### Single-Server Deployment

In a single-server deployment, all TASKE components reside on one server, along with Microsoft IIS. A connection between the telephone system and the server creates a real-time data stream, allowing TASKE servers to collect and store data. TASKE clients access and work with this data via connections to the server computer.

The following diagram shows a single-server deployment and its connections among the telephone system, server computer, and web clients.

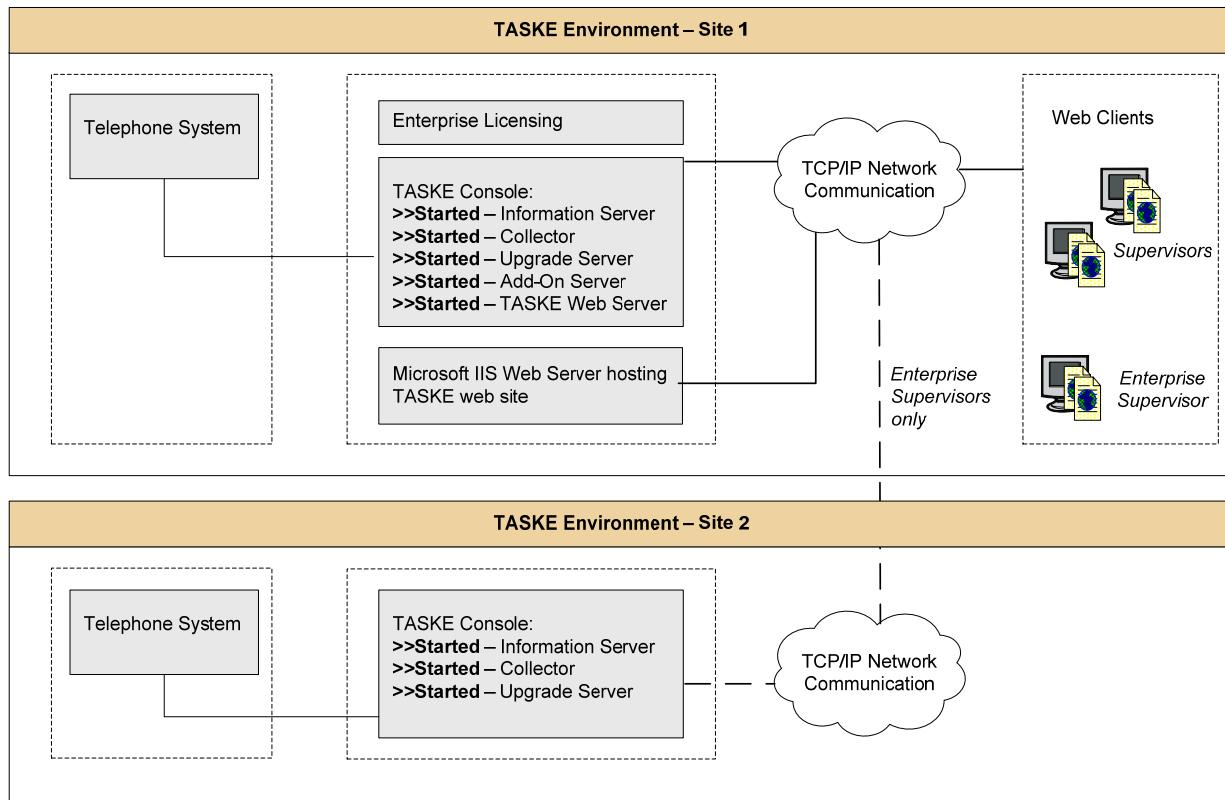


**Note:** The TASKE site license determines the number of simultaneous connections from TASKE web clients to TASKE servers.

### Enterprise Deployment

For sites with Enterprise licensing, the Information Server connects to Information Servers in TASKE remote installations over a wide area network (WAN). After establishing connections, the Information Server at each Enterprise site collects, stores, and disperses the site data to its clients. Only Enterprise Supervisors can monitor and report on remote sites.

The following diagram shows an Enterprise deployment and its connections among the telephone system, server computer, and web clients.





## Chapter 2 Installing TASKE Components on the Server

This chapter describes how to install and configure TASKE components on the server computer. The installation and configuration process involves:

- preparing the telephone system
- preparing the server computer
- gathering installation tools
- installing TASKE components on the server
- configuring the TASKE database
- verifying data collection
- defining users in the TASKE database

This chapter also describes how to provide supervisors with access to the TASKE web interface. For this client only, access is provided through a web browser and no TASKE components are installed on supervisors' computers. For information about installing other TASKE client components on non-server computers, see Chapter 3, "Installing TASKE Client Components on Additional Computers".

### Prepare the Telephone System

Before installing and configuring any TASKE components, complete the telephone system setup for the connectivity configuration you plan to use.

### Prepare the Server Computer

Before installing and configuring the TASKE components on the server, ensure that the computer meets the hardware, software, and networking requirements for the installation. For a complete list of requirements, see <http://www.taske.com/requirements>.

The server must be running Microsoft Internet Information Services (IIS) and Microsoft Internet Explorer 6.0 or higher.

The following TCP/IP ports must be available on the server:

- 5210 for the TASKE Server
- 5053 for the TASKE Upgrade Server
- 5212 for the real-time agent adherence (RTAA) Server (TASKE Contact installations with Blue Pumpkin® licensing only)
- 5214 for TASKE Chat (TASKE Contact installations only)
- 5051 for the TASKE Web Server

Microsoft networking or Novell® Netware®. Microsoft networking are recommended. The procedures in this guide assume you are operating a Microsoft networking environment and that the TCP/IP protocol is installed, configured, and working properly on all computers in the TASKE network.

**To test the operation of TCP/IP:**

1. At each computer in the TASKE environment, ping 127.0.0.1 (the local host address). If there is no response, reinstall and configure the local TCP/IP stack.
2. At each computer with a network connection to the server, ping the server. If an appropriate response is received, TCP/IP is working properly.

## Gather Installation Tools

Before installing TASKE components, ensure that you have the following:

- TASKE installation CD that contains the setup program for installing the software
- TASKE Administration Disk that contains the license file

## Install TASKE Components on the Server

Install the TASKE components on the server by running the setup program on the TASKE installation CD.

The setup program automatically installs both server and client components, with the exception of TASKE Desktop. This client is not automatically installed on the server computer because it requires Java 1.5 or higher. If the server does not require an earlier version of Java, you can install TASKE Desktop on the server manually, following the instructions provided in Chapter 3, “Installing TASKE Client Components on Additional Computers”.

The setup program adds TASKE Console to the Windows Startup folder so that TASKE Console launches each time the server starts. Any TASKE servers, applications, or services that are configured to start automatically are launched once TASKE Console is running. In the event of a server shutdown, this configuration minimizes data and service losses by ensuring that all components required for data collection and management are started as soon as the server is up and running.

**Note:** If you are upgrading from a previous release, the setup program removes some existing Windows-based TASKE applications (such as ACD Monitor and Reports). The TASKE 8.8 clients provide similar functionality and, typically, provide better performance at a lower administrative cost.

**To install TASKE components on the server:**

1. Ensure you are logged into the server with administrative privileges and shut down all applications on the computer.
2. Insert the TASKE installation CD in the CD-ROM drive.

The installation starts copying the TASKE server components.

If the installation does not start automatically, run the setup program (named **setup.exe**) on the CD.

- Follow the prompts until a window with a **Finish** button appears.

When prompted for a site license, provide the license file (.tlf) on the Administration disk.

You will be prompted for the computer name and network address in the Windows network domain. If users require access to the information from the server computer from outside the local domain (for instance through a WAN), you must specify an IP address as the network address.

- Click **Finish**.

The setup program installs TASKE client components.

- When the InstallShield Wizard Complete window appears, click **Finish**.

When the setup program completes, the TASKE Database Update Wizard starts automatically. For information about using this wizard, see "Configure the TASKE Database".

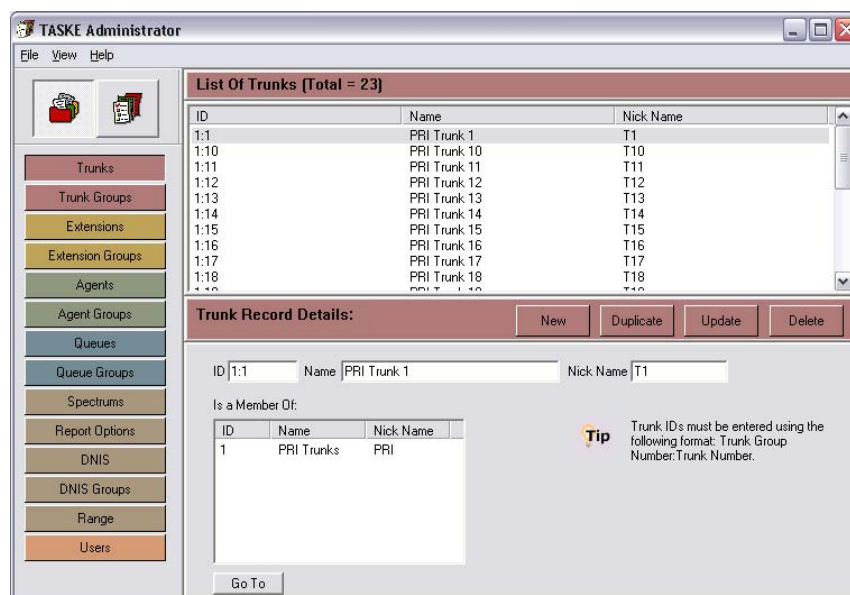
## Configure the TASKE Database

When the setup program on the server completes, the TASKE Database Update Wizard starts automatically. Use this wizard to populate the TASKE database with necessary telephone system resources using the information available from your telephone system.

### To configure the TASKE database:

- When the TASKE Database Update Wizard starts after the setup program completes, follow the prompts provided by the wizard.
- From the Update Complete page, select the **Launch the TASKE Administrator** check box and click **Done**.

The TASKE Administrator window looks like this when the Trunks button is selected:



## Verify Data Collection

Confirm that the TASKE installation and configuration were successful by verifying that data is being collected.

**To confirm successful installation:**

1. From TASKE Console, double-click **Information Server**.
2. On the **MIS** tab, verify that events are streaming through the **MIS** Events area.
3. If there are no events, there is a problem with data collection. Contact TASKE Technical Support (<http://support.taske.com>) for assistance.

## Define Users in the TASKE Database

Only users who are defined in the TASKE database can access TASKE clients. You define users in TASKE Administrator.

Defining a user involves specifying logon credentials (a user name and password), the user type (for example, agent or supervisor), and the clients available to the user. For information about defining users, see the *TASKE Server online help*.

## Provide Supervisor Users with Access to the TASKE Web Interface

Users who are defined as supervisors in the TASKE database can access the TASKE web interface. No client installation on their computers is required. For information about defining users as supervisors in TASKE Administrator, see the *TASKE Server online help*.

Supervisors access the TASKE web interface by typing the following in a web browser, and then providing the appropriate user name and password:

**`http://TASKE_WebServerName/TASKE/login.htm`**

After accessing the TASKE web interface, supervisors can begin to explore its features and realize the benefits it brings to your business. Information about using the TASKE web interface is available from the **Help** link in the TASKE web interface.

## Chapter 3 Installing TASKE Client Components on Additional Computers

This chapter describes how to install TASKE client components on additional computers. The most common reason for doing this is to install client components, such as TASKE Desktop, on a user's computer.

**Note:** For the TASKE web interface, no components must be installed on users' computers. Access is provided to authorized users through a web browser.

### Requirements

Before installing client components, a user must have administrative privileges for installation on that computer.

Before an installed client component is available to a user, the appropriate TASKE license must be available on the server computer. As well, you must define the user, with appropriate privileges for the client, in TASKE Administrator.

### Installing Client Components

Client components that require installation include TASKE Desktop, TASKE DisplayCentral, TASKE DisplayCentral Designer, TASKE ODBC drivers, and TASKE Administrator.

**To install client components:**

1. From the computer on which you want to install a client, go to the following location:  
**`http://TASKE_WebServerName/setup`**
2. Go to the folder that contains the client:
  - **Agent** to install TASKE Desktop
  - **DisplayCentral** to install TASKE DisplayCentral or TASKE DisplayCentral Designer
  - **ODBC** to install TASKE ODBC drivers
  - **Supervisor** to install TASKE Administrator
3. Double-click **setup.exe**.
4. Follow the prompts to complete the installation.

## Chapter 4 Advanced Server Setup

Some TASKE environments require additional setup after installation. This chapter describes the additional setup required if the:

- SiteData folder is located on a remote server. See "Install the SiteData Folder on a Remote Server" and "Assign Network Accounts to the TASKE Add-On Server and TASKE Web Server".
- web client users print to a networked printer. See "Assign Network Accounts to the TASKE Add-On Server and TASKE Web Server".

You can also choose to add or remove components after installation.

### Install the SiteData Folder on a Remote Server

You may want to install the SiteData folder on a remote file server that has a regular backup procedure. When TASKE Console starts for the first time, an error appears indicating that the path to the SiteData folder cannot be resolved. You resolve this error by running the TASKE IP Address Wizard.

#### To run the TASKE IP Address Wizard:

- 1 Stop the Information Server in the TASKE Console.
- 2 In TASKE Console, click **Tools, Network Settings**.
- 3 Follow the prompts to complete the wizard.
- 4 Restart the Information Server in TASKE Console.

### Assign Network Accounts to the TASKE Add-On Server and TASKE Web Server Services

By default, the TASKE Add-On Server and TASKE Web Server are assigned to a local system account. These services require a network domain account to function properly when:

- web users print to a networked printer. Although users can print successfully, the Add-On Server will display a message that a default printer is not configured. This message does not appear when a network domain account is configured for the Add-On Server.
- the SiteData folder resides on a remote computer. The TASKE Web Server requires a network domain account to access the SiteData folder, copy the data files and distribute information to the web client users.

TASKE recommends creating a generic network domain account and assigning this account to these services to avoid network account conflicts.

## **Add or Remove Components for an Installation**

You can add and remove components after the initial server installation by running the setup program on the TASKE installation CD. This program prompts you to choose whether you want to add components or remove all the installed components. Follow the prompts to complete the procedure.

## Chapter 5 Troubleshooting

The following topics address issues that may occur during installation, server startup or data collection, as well as suggestions on how to resolve the issues.

### Licensing Information Could Not Be Loaded

The following error message may appear when the Information Server attempts to start:

Could not load licensing information, check log for details.

This message may indicate that a valid license file is not in the proper location. Verify that the site license file is present in the \TASKE folder on the server computer. The filename is based on the site lock number and uses the filename extension .tlf.

If the file is not present, locate the license file on the TASKE Administration Disk (a 3.5" floppy disk) and copy the file into the \TASKE folder.