

Volume

3

**TECHNOLOGY FOR BUSINESS**

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Client Installation for Agent eMail, ACD Display and ACD Reports

# Agent Client Installation

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CORPORATE COMMUNICATIONS

# Agent Client Installation Manual

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# Installation Overview

*This manual presents a summary of the major steps in setting up TFB client software on agent and supervisor workstations.*

**T**he TFB Media Server is the standard Windows based server platform required to run Agent eMail, Agent Chat, and ACD Reports. Each of these products uses a thin client on agent and supervisor Windows desktops.

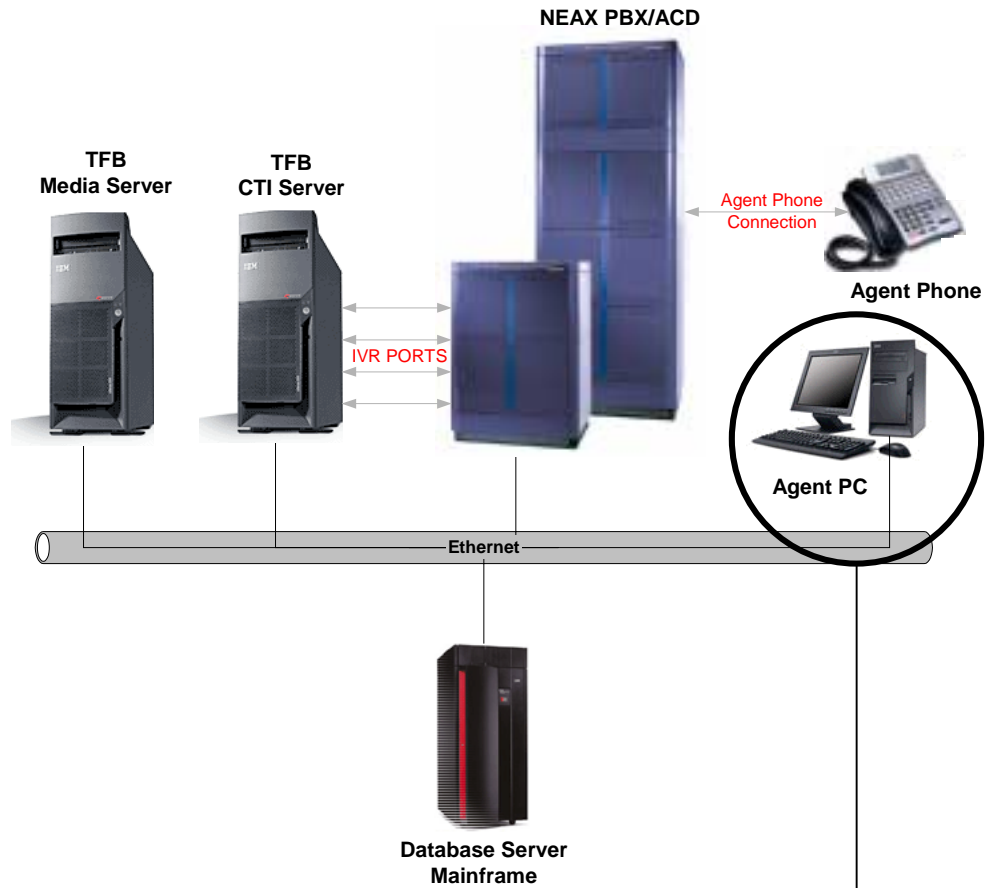
Any combination of Agent eMail, Agent Chat, ACD Reports may be run on the same server, and any combination of the associated clients can run on the same client PC. At the users discretion, the application clients may be selectively installed on given PCs.

This manual describes installation of the following clients,

- ACD Reports
- Agent eMail
- ACD Display

Before installing any client software, please ensure that the target workstation is updated with the latest version of Microsoft Windows.

Major System Components



THIS MANUAL DESCRIBES SOFTWARE  
INSTALLATION ON THE AGENT/SUPERVISOR PC  
COMPONENT OF THE SYSTEM ONLY

# Installing the ACD Reports Client

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**Platform Requirements:** Windows XP, Windows 2000, Pentium II or better, 64MB RAM, 10MB Hard Drive space

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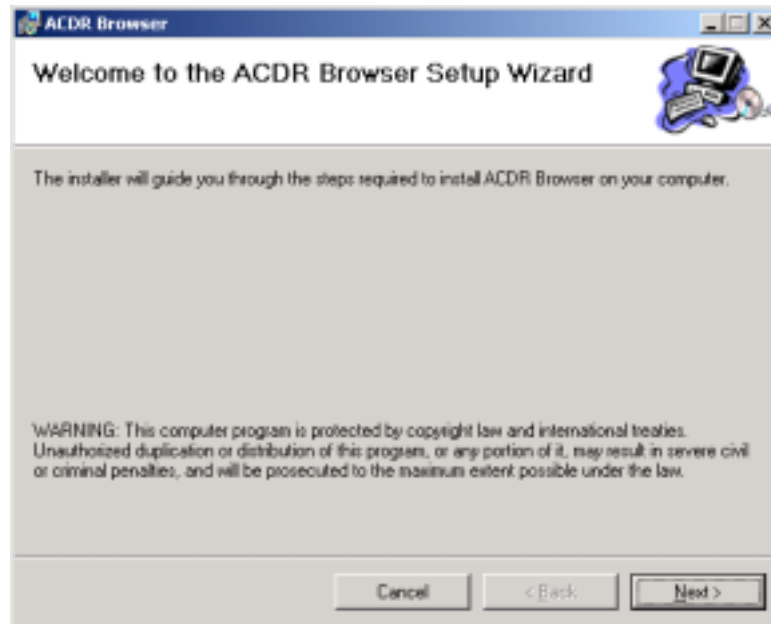
The automated installation wizard is located in the **ACDR.msi** file. Your version is site specific, so be sure to get the current file from the Media Server or the installation technician. The installation process will automatically place an ACD Reports Browser icon on your desktop. The ACD Reports client requires also that the .NET framework is installed on the target workstation. If the installation does not find .NET installed, it will automatically prompt and direct you to the Microsoft web site for .NET components.

## Step 1

Double click the **ACDR.msi** icon.

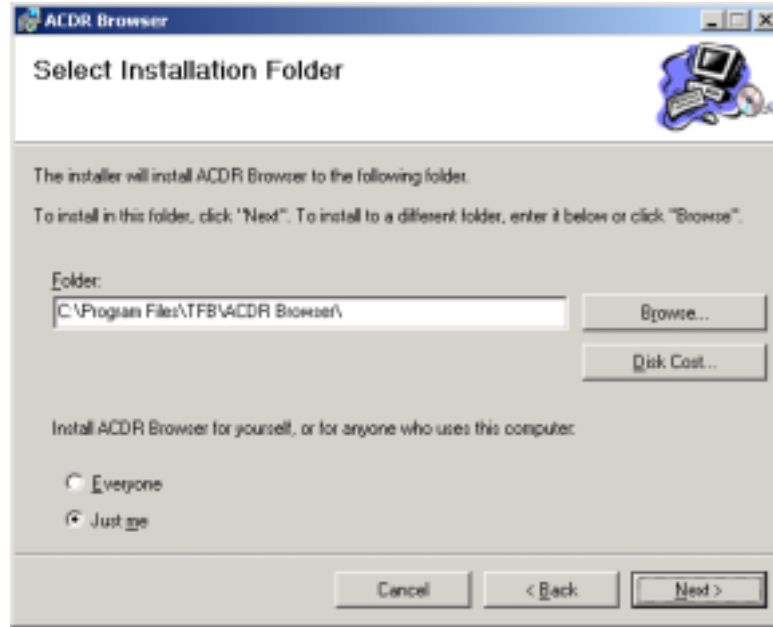
## Step 2

The install Wizard opens. Click the **Next** button.



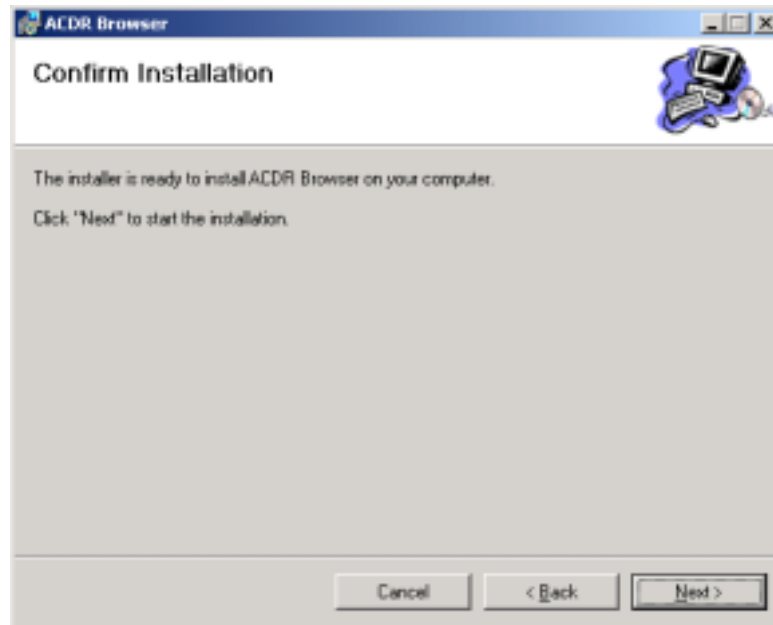
### Step 3

Select the installation folder. The default folder is recommended. Click **Next**.



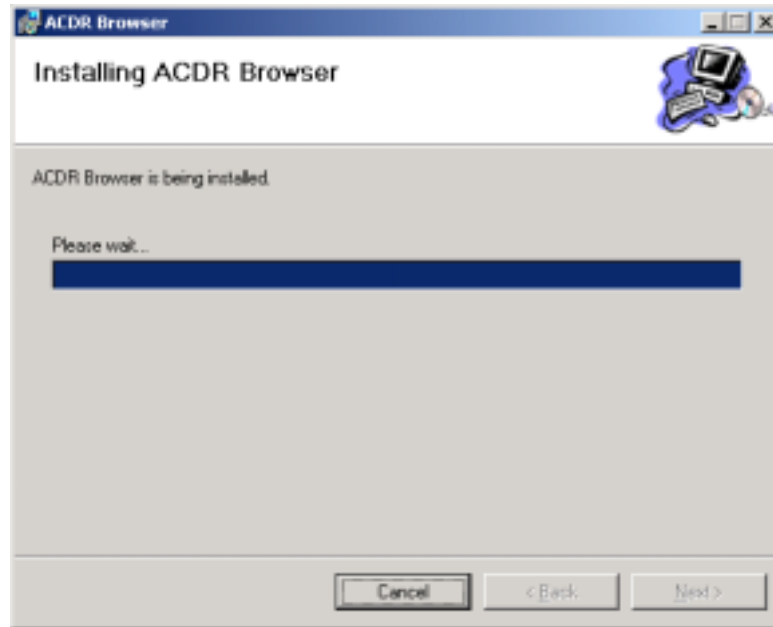
### Step 4

Confirm the installation by clicking **Next**, or click **Back** to change the installation folder.



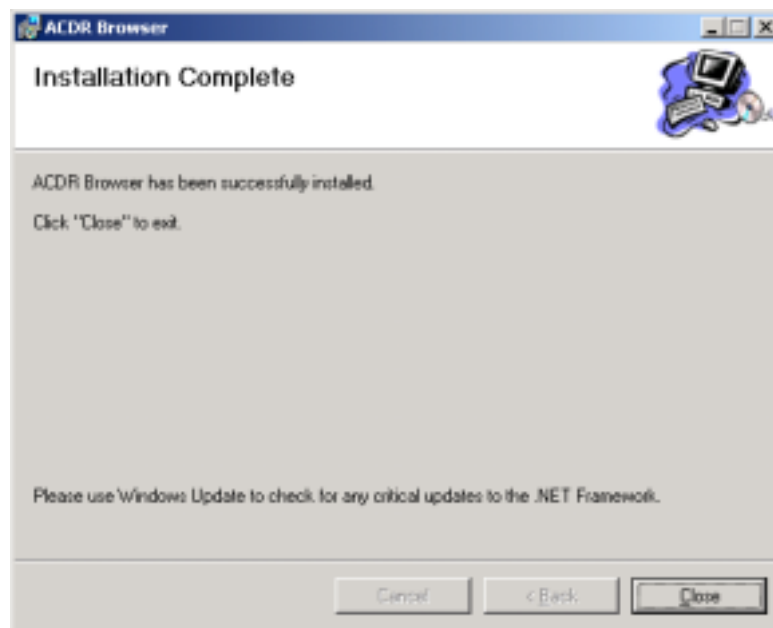
## Step 5

Installation typically takes just a few seconds.



## Step 6

After installation, click the **Close** button.



The installation program automatically put a shortcut on the Windows desktop.

### **WHAT IF THERE IS AN ERROR DURING INSTALLATION ?**

If an error occurs, check the following,

- That there is at least 10MB of hard drive space free
- That all appropriate Windows updates have been applied
- That there are no other programs running

ACD Reports is a thin client, so it takes up very little hard drive space. If you have at least 10MB, all Windows updates have been applied, and the client does not install, contact TFB technical support and a technician will help you troubleshoot the system.

# Installing the Agent eMail Client

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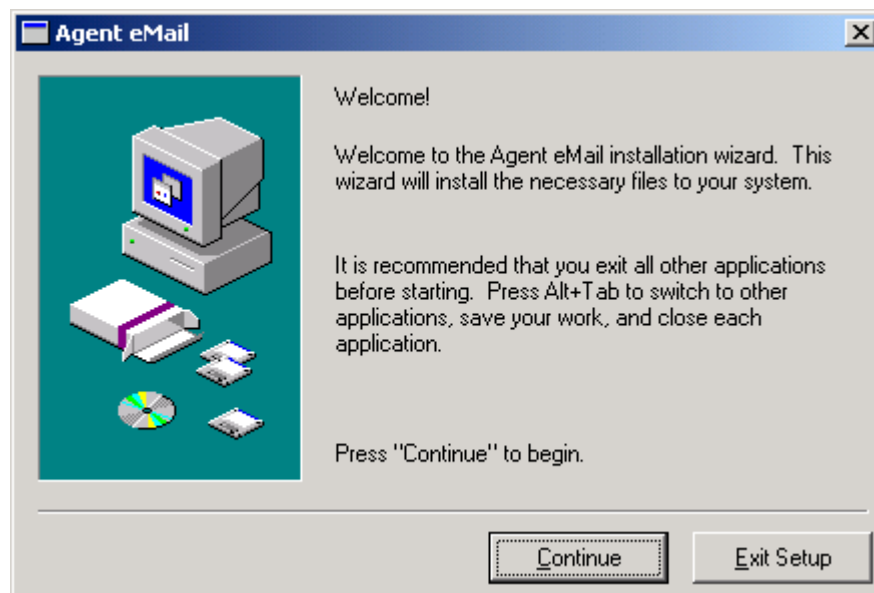
**Platform Requirements:** Windows XP, Windows 2000, Pentium II or better,  
64MB RAM, 10MB Hard Drive space

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The automated installation wizard is located in the **Agent eMail.exe**. Your version is site specific, so be sure to get the current file from the Media Server.

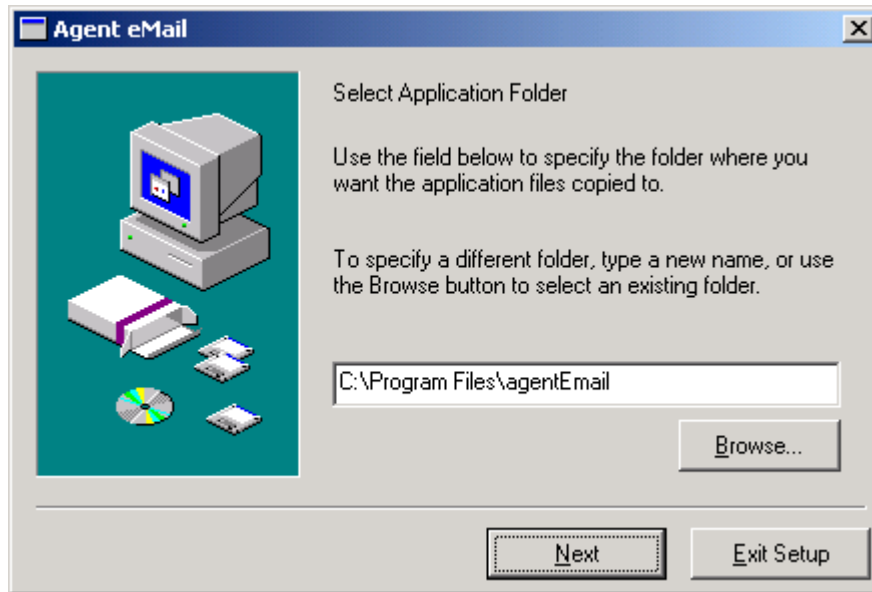
## Step 1

Double click the **Agent eMail.exe** icon. The Agent eMail Installation Wizard appears. Click the **Continue** button.



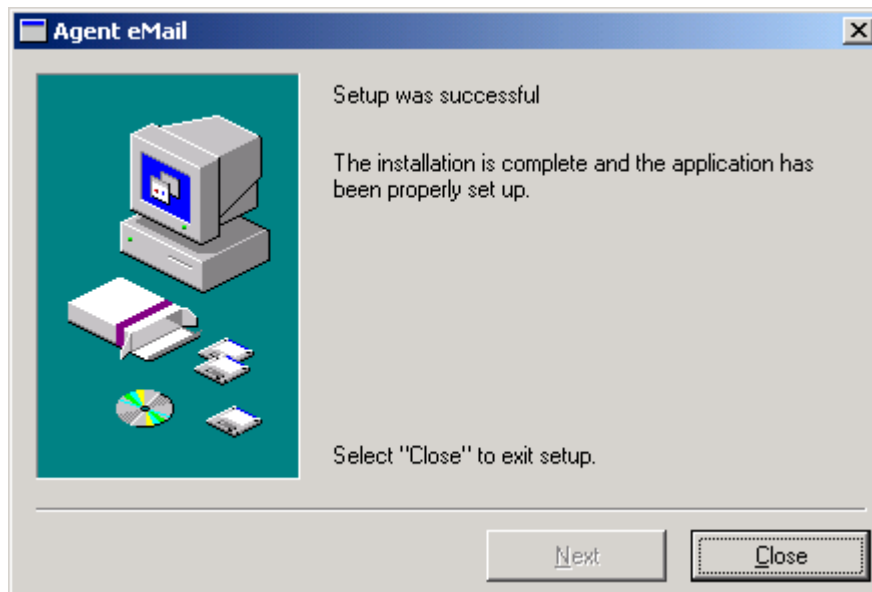
## Step 2

Select the installation path. The default path is recommended. Click the **Next** button.



## Step 3

After installation, click the **Close** button.



### **WHAT IF THERE IS AN ERROR DURING INSTALLATION ?**

If an error occurs, check the following,

- That there is at least 10MB of hard drive space free
- That all appropriate Windows updates have been applied
- That there are no other programs running

Agent eMail is a thin client, so it takes up very little hard drive space. If you have at least 10MB, all Windows updates have been applied, and the client does not install, contact TFB technical support and a technician will help you troubleshoot the system.

# Installing the ACD Display Client

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**Platform Requirements:** Windows 98, Windows XP, Windows 2000, Pentium II or better, 64MB RAM, 10MB Hard Drive space

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ACD Display is actually two executables:

- **Queue Display, tqr.exe** provides queue wallboard information in real time
- **Agent Display, taar.exe** provides agent wallboard information in real time

The installation process involves a simple copy into the tfb\bin folder on the agent PC, entering the CTI Server IP address, and creating the necessary shortcuts on the desktop. You can also configure the shortcut to open a particular profile automatically.

Before starting you may want to create all the profiles your agents will commonly use so they can simply be copied along with executables to all the desired PCs. You also need to know the IP address of CTI Server. The following steps show how to setup both programs on the first machine, then copy configuration to other agent workstations.

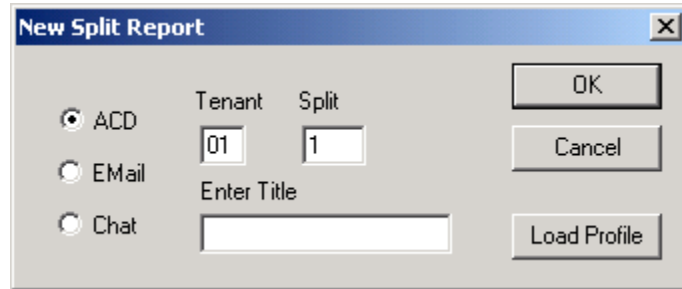
## Step 1 – Copy Executables

Copy the executables, tqr.exe and taar.exe into the tfb\bin folder on an agent PC.



## Step 2 – Run Queue Display (tqr.exe)

Execute **tqr.exe** from the **tfb\bin** folder and enter '1' (or any valid split number) in the split field, then click **OK**. You can enter a title for that split also, but it is not necessary in order to start the program.



## Step 3 – Configure CTI Server IP

Enter the network name or IP address of CTI Server, then click **OK**.



If you get an error message, check that the IP address entered is correct. If you entered a server name and see an error, try entering an explicit IP address instead.

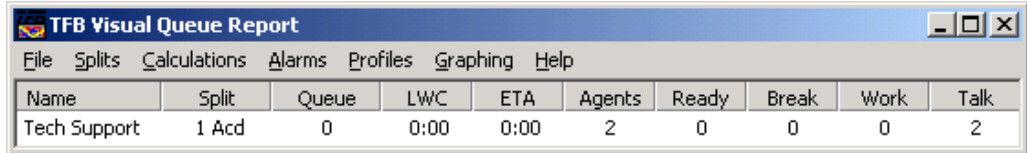
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**NOTE** The client IP addresses are stored in `\winnt\tfbclients.ini`. After initial configuration, it is convenient to copy this file to other agent PCs along with the executables.

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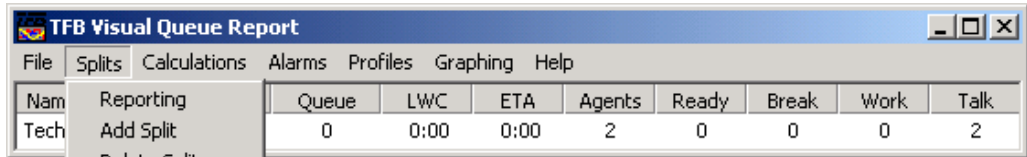
## Step 4 – Create Queue Display Profiles

You can now create one or more profiles that can then be copied to agent machines for repeated use. A profile is simply a saved configuration of the splits to be viewed in a single queue display window. Follow the instructions on the next page to create profiles, or skip ahead to Step 5. Profiles can be created and copied after installation if desired.



Name	Split	Queue	LWC	ETA	Agents	Ready	Break	Work	Talk
Tech Support	1 Acd	0	0:00	0:00	2	0	0	0	2

You can add more splits by clicking from the **Splits | Add Split**



Name	Split	Queue	LWC	ETA	Agents	Ready	Break	Work	Talk
Tech	Add Split	0	0:00	0:00	2	0	0	0	2

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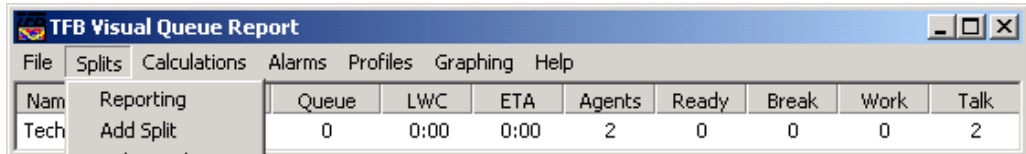
**NOTE** Entering a split that does not exist in the ACD or is not a configured Email / Chat split is not harmful, although erroneous information might be displayed for that split.

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## Step 4 – Cont'd

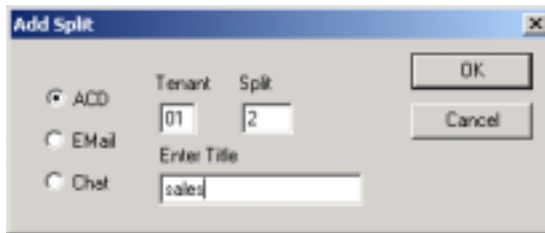
### TO CREATE A PROFILE

Add the desired splits by clicking from the **Splits | Add Split**



TFB Visual Queue Report										
File		Splits	Calculations	Alarms	Profiles	Graphing	Help			
Name	Reporting	Queue	LWC	ETA	Agents	Ready	Break	Work	Talk	
Tech	Add Split	0	0:00	0:00	2	0	0	0	2	

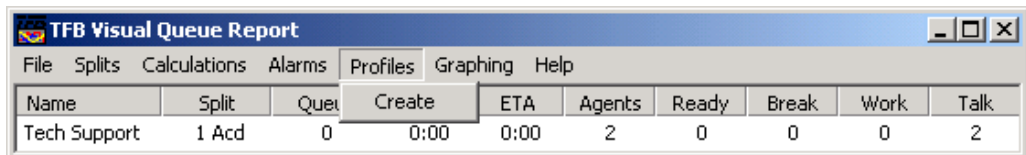
Enter the split number and title. If the split number is already configured in the ACD, then the split title will automatically appear in the display and does not need to be entered manually



Add Split dialog box showing options for ACD, EMail, and Chat. The ACD option is selected. The Tenant field contains '01' and the Split field contains '2'. The Enter Title field contains 'sales'.

Select the type of split then click **OK**. You can continue to add splits this way until the display shows all the desired splits.

Save the display by selecting **Profiles | Create** from the main menu. Name the profile as desired and save it in the tfb\bin folder. A file with a **wbp** extension will be created. This file can then be copied for use on other systems. Even more usefully, the profile files can be specified in shortcuts so that they load automatically.

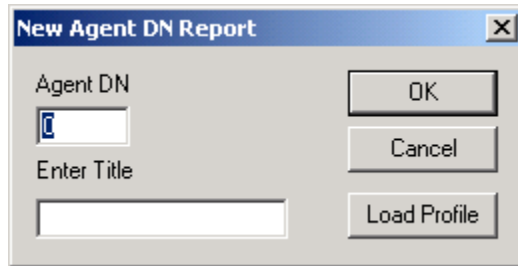


TFB Visual Queue Report										
File		Splits	Calculations	Alarms	Profiles	Graphing	Help			
Name	Split	Queue	ETA	Agents	Ready	Break	Work	Talk		
Tech Support	1 Acd	0	0:00	0:00	2	0	0	0	2	

For more on profiles and using the Queue Display, see the TFB APM Users Guide.

## Step 5 – Run Agent Display (taar.exe)

Execute **taar.exe** and enter a valid agent DN (stn) in the **Agent DN** field, then click **OK**. You can enter a title or name for that agent also, but it is not necessary in order to start the program.



## Step 6 – Configure CTI Server IP

Enter the IP address of CTI Server, then click **OK**.



If you get an error message, check that the IP address entered is correct. If you entered a server name and see an error, try entering an explicit IP address instead.

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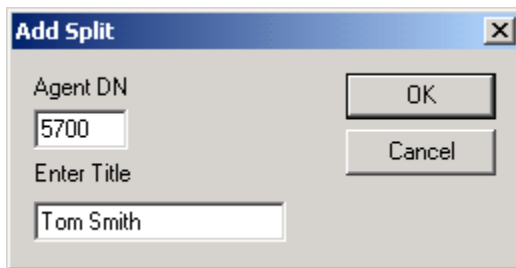
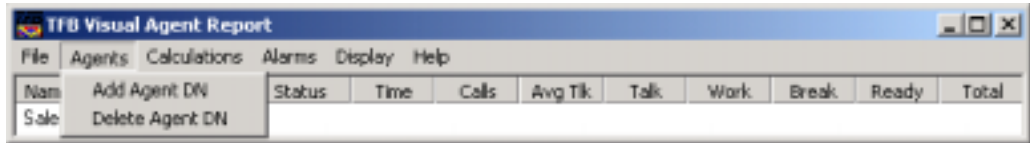
**NOTE** The client IP addresses are stored in `\\winnt\fbclients.ini`. After initial configuration, it is convenient to copy this file to other agent PCs along with the executables.

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## Step 7 – Create Agent Display Profiles

Just as with Queue Display, you can now create one or more profiles that can then be copied to agent machines for repeated use. A profile for Agent Display is simply a saved configuration of the agent DNs to be viewed in a single display window. Follow the instructions on the next page to create profiles, or skip ahead to the next Step. Profiles can be created and copied after installation if desired, and you can create as many profiles as required.

You can add more splits by clicking from the **Agents | Add Agent DN** menu.



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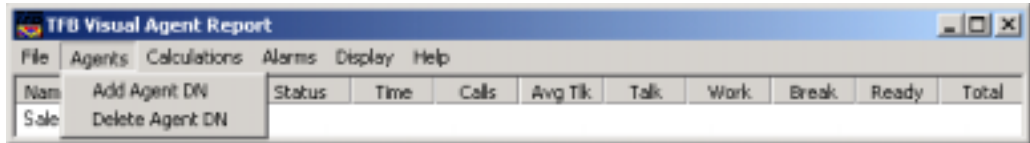
**WARNING** Entering a DN that does not exist in the ACD is NOT recommended.

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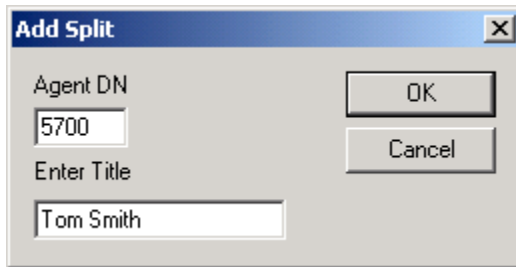
## Step 7 – Cont'd

### TO CREATE A PROFILE

Add the desired splits by clicking from the **Agents | Add Agent DN** menu

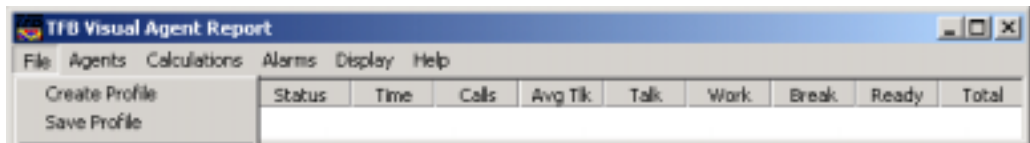


Enter the agent DN and title.



Select the type of split then click **OK**. You can continue to add splits this way until the display shows all the desired splits.

Save the display by selecting **Files | Create Profile** from the main menu. Name the profile as desired and save it in the tfb\bin folder. A file with a **aap** extension will be created. This file can then be copied for use on other systems. Even more usefully, the profile files can be specified in shortcuts so that they load automatically.



For more on profiles and using the Agent Display, see the TFB APM Users Guide.

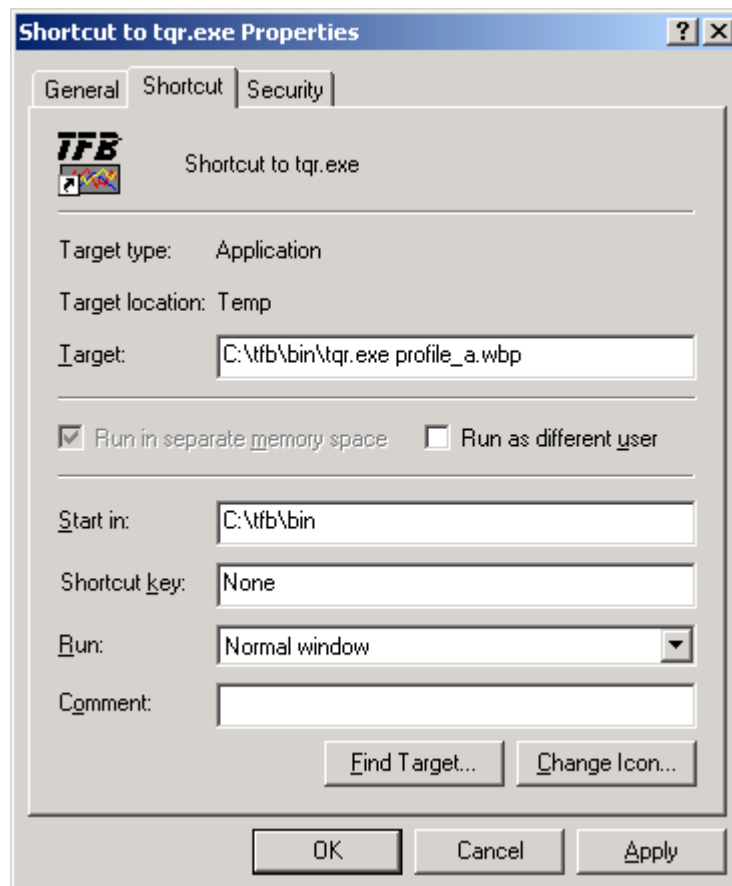
## Step 8 – Create Desktop Shortcuts

As with any other client, shortcuts can be created from **taar.exe** and **tqr.exe** as desired. The real value of shortcuts for these applications is that they allow profiles to be loaded automatically. For each application, you can create multiple shortcuts that each load a different profile.

If you created profiles in the steps above, you can use them in your shortcuts.

### TO LOAD PROFILES FROM A SHORTCUT

- Create a shortcut to tqr.exe or taar.exe
- Right click the shortcut icon and select Properties
- In the Target field, enter the path to the executable file, followed by a space and the name of the profile file. Click **OK**. Queue Display shortcuts have a **wbp** extension, and Agent Display shortcuts have an **aap** extension.



## Step 9 – Copy to Workstations

With the ACD Display modules setup on a single machine you can copy not only the executables but the profiles as well.

From the folder of your first workstation installation, copy the following files,

- tfb\bin\tqr.exe
- tfb\bin\taar.exe
- tfb\bin\\*.wpb
- tfb\bin\\*.aap

Also copy any shortcuts you set up if applicable.