



*intelli-CTi*<sup>TM</sup>  
for Unified Service Desk  
Version 4.1

**intelli-CTi for Unified Service Desk -  
Installation and Configuration Guide**

Document Version 1.0

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In the unlikely event that data becomes lost or corrupted, QGate Software Limited cannot be held responsible.

## Overview

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This document is a guide to the installation and configuration process for intelli-CTi™.

This guide outlines the following:

- intelli-CTi™ system requirements
  - Installation planning
  - Installing the intelli-CTi™ client software
  - Installing and configuring the network support
  - Configuring intelli-CTi™ application notifications
  - Testing your installation
- 
- Unified Service Desk Package Installation
  - Configuration of intelli-CTi™ for Unified Service Desk
  - Testing intelli-CTi™ for Unified Service Desk

## System Requirements

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In the interest of providing customers with the latest product support information, we provide the following online resources within our intelli-CTi™ website:

### System Requirements

For information regarding the minimum system requirements for installing and running intelli-CTi™, please visit the product system requirements page:

[www.intellicti.com/help/sysreqs/](http://www.intellicti.com/help/sysreqs/)

### Telephony System Support

To enable intelli-CTi™ to integrate with your telephone system, the necessary system interfaces within your telephone system must be enabled.

As part of the installation process, you will need to know the IP address of your telephone system. There may be other requirements for your telephone system.

For a detailed list of the telephone systems that we support and the necessary system requirements for each system, see our intelli-CTi™ [Compatibility List](#).

## Installation Outline

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This section outlines the steps required to install and configure intelli-CTi™.

### intelli-CTi Core Installation

#### [Install the intelli-CTi™ Service Software \(On-Premises Only\)](#)



The intelli-CTi™ Service communicates with your on-premises telephone system. This installation will also include the intelli-CTi™ Management Console, used to administer the integration to your telephone system, users and licensing.

**Note:** *If you are installing intelli-CTi™ for demonstration purposes, i.e. you are not intending to connect it to a real-life telephone system, then you can skip this step and use the [QGate Virtual Telephony Server \(VTS\)](#).*

#### [Install the intelli-CTi™ Management Console Software \(Cloud-Hosted Only\)](#)



The intelli-CTi™ Management Console provides the means to manage your intelli-CTi™ users.

#### [Install the intelli-CTi™ Client Software](#)



The intelli-CTi™ client software allows users to view their telephone activity and provides telephony integration with applications on the users desktop.

### intelli-CTi for Unified Service Desk Installation

#### [Run the intelli-CTi™ Package Deployer](#)



Install supporting package.

#### [Migrate telephone numbers into intelli-TNS](#)



Use the intelli-TNS Data Load utility to populate intelli-TNS with all your telephone numbers.

## Installing intelli-CTi

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### intelli-CTi – Installation Planning

This section will assist you in the considerations you should make when planning your intelli-CTi™ installation.

It also outlines certain questions that should be asked and the appropriate support you should consider.

#### Telephone Switch Vendor

It is highly likely that you will require the support of your telephone switch vendor or telecommunications provider at some stage during the installation. This may simply be to ask certain questions and to establish what steps are required to CTI-enable your telephone system.

It may also be required for the switch vendor to make technical changes to the telephone system to enable CTI within the system.

The switch vendor may also be required to provide the necessary software support to connect your telephone system to your computer network and the Telephony Client Software support for the intelli-CTi™ Device Service.

#### Questions and Answers

When planning an intelli-CTi™ installation, it is recommended that the following questions are asked. Whether it be a proof of concept study or a full implementation, this information is very important during the planning stages of an installation.

- Q **What is the make and model of your telephone system?**
  - This may be something the internal systems support groups are able to answer, or something the telephone switch vendor or supplier should be able to.
- Q **Is the telephone system on the list of telephone systems supported by intelli-CTi?**
  - For a detailed list of the telephone systems that we support and the necessary system requirements for each system, see our intelli-CTi™ [Compatibility List](#).
  - You will also find more information about what software and licensing will be required from your telephone system supplier.

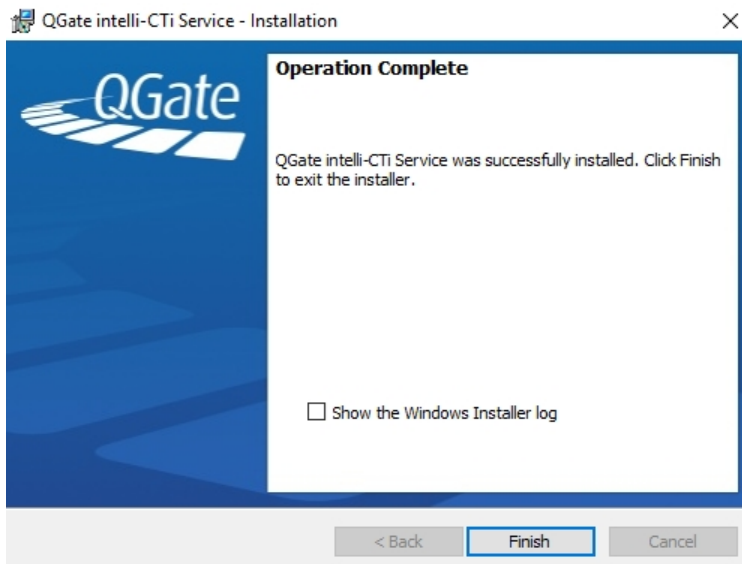
## intelli-CTi Installation

### Installing the intelli-CTi Service Software

Installation of the intelli-CTi™ Service is completed by use of an install wizard. If you are using a **Cloud** hosted platform you can skip this part.

#### Installation Procedure

1. Run the **intelli-CTi - Service Setup.exe** file from within the **Install** directory of your intelli-CTi™ Installation Package. The installer will start.
2. Click on the **Install** button to start the installation process.
3. The installation will start. This might take a while, depending on whether any of the required software needs to be installed (see above).
4. When the installation is complete, the following dialog will be displayed:



5. Click the **Finish** button.

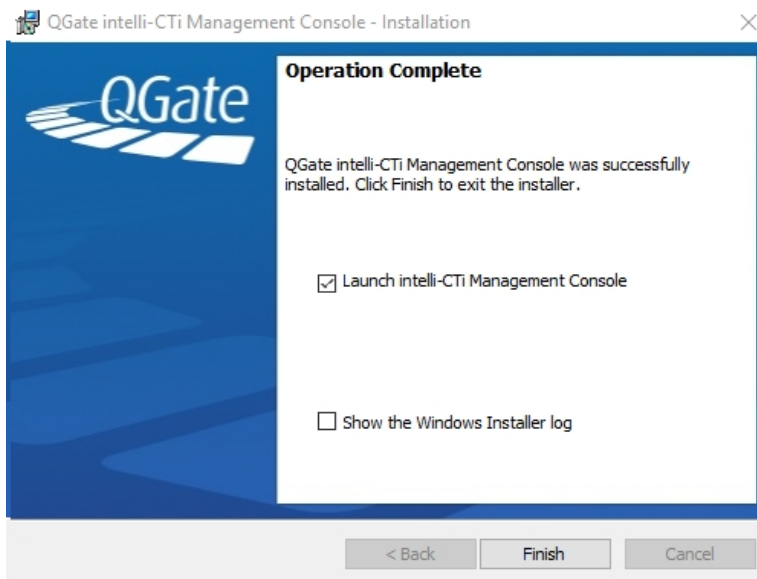


## Installing the intelli-CTi Management Console (Cloud-Hosted Only)

Installation of the intelli-CTi™ Management Console is completed by use of an install wizard. If you are using a **Cloud** hosted platform you can continue with this part otherwise you should complete the [service installation](#) if you host your telephone system on-site.

### Installation Procedure

1. Run the **intelli-CTi™ Service - Management Console Setup.exe** file from within the **Install** directory of your intelli-CTi Installation Package. The installer will start.
2. Click on the **Next** button to proceed through the installation setup process.
3. Click on the **Install** button to start the installation process.
4. The installation will start. This might take a while, depending on whether any of the required software needs to be installed (see above).
5. When the installation is complete, the following dialog will be displayed:



6. Click the **Finish** button to complete the installation which will also launch the Management Console for [Configuring the Service](#).

## Configuring intelli-CTi Service

Configuration of the intelli-CTi™ Service is completed by using the intelli-CTi™ Management Console.

*Note: If you do not already have the intelli-CTi™ Management Console installed, run the intelli-CTi™ Service - Management Console Setup.exe from within the Install directory of your intelli-CTi™ Installation Package, following the on-screen instructions.*

### Login Procedure

On loading the intelli-CTi™ Management Console, you will be prompted to log in to the Service.

From the intelli-CTi™ Management Console you can select one of the following intelli-CTi™ service type modes:

1. Network Service
2. Cloud Service

### Network Service

QGate provides a networked intelli-CTi™ Service to integrate with on-premises telephone systems. This service should of been installed during the intelli-CTi™ [Service Software Installation](#). To connect to a Networked intelli-CTi™ Service do the following:

1. Select Network Service from the intelli-CTi™ Service Type drop down menu.
2. Enter your intelli-CTi™ Service DNS name or IP Address for connecting to the Service.
  1. If you are on the same machine that the intelli-CTi™ was installed to, then use "localhost" as the Service name. Otherwise, enter the name/IP of the remote machine where intelli-CTi™ Service has been installed.
3. Specify the type of authentication you would like to use to connect to the intelli-CTi™ Service (Windows Authentication or Specific intelli-CTi™ User). If you specify to use a intelli-CTi™ User, you will be required to enter the user name and password for authentication.

*Note: The default administrator user name is "administrator" with an empty password. You are advised to change the default administrator password on first login (by setting a new password within the user management area).*



4. When you're ready, clicking OK will attempt to make a connection to the service running the intelli-CTi™ Service. If a connection is successful, a message will be displayed. If for any reason the connection failed, it will also result in a message being displayed about the error.
5. Some additional settings related to connecting to your intelli-CTi™ Service can be found by clicking Show Additional Settings.
6. Proceed to [Subscription Management](#).

## Cloud Service

If you have a hosted telephone system, QGate will provide a Cloud Hosted intelli-CTi™ Service. To connect to a hosted intelli-CTi™ Service do the following:

1. Select **Cloud Service** from the **intelli-CTi™ Service Type** drop down menu.
2. Enter your **intelli-CTi™ Cloud Service** Subscription Key.
3. Specify the **username** and **password** to authenticate with the Cloud Service, username and password are the only authentication methods currently available for cloud authentication.

*Note: The default administrator user name is "administrator" with an assigned password given by your intelli-CTi™ software supplier. You are advised to change the default assigned administrator password on first login (by setting a new password within the user management area).*

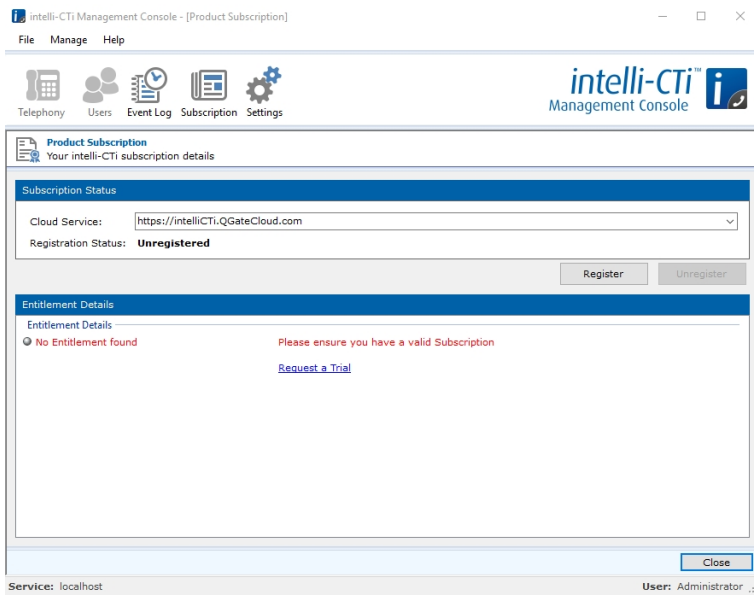
4. When you're ready, clicking **OK** will attempt to make a connection to the service running the intelli-CTi™ Service. If a connection is successful a message will be displayed, for any reason to why a connection would not connect would also be displayed on failure to connect.
5. Some additional settings related to connecting to your intelli-CTi™ Service can be found by clicking **Show Additional Settings**.

## Subscription Management

The subscription management screen allows you to manage your intelli-CTi™ Service Registration, as well as seeing your intelli-CTi™ Subscription/License entitlement details.

**Note:** This is only applicable to customers with an on-premises/Network intelli-CTi™ Service, if you are using QGate's Cloud service you can skip this step.

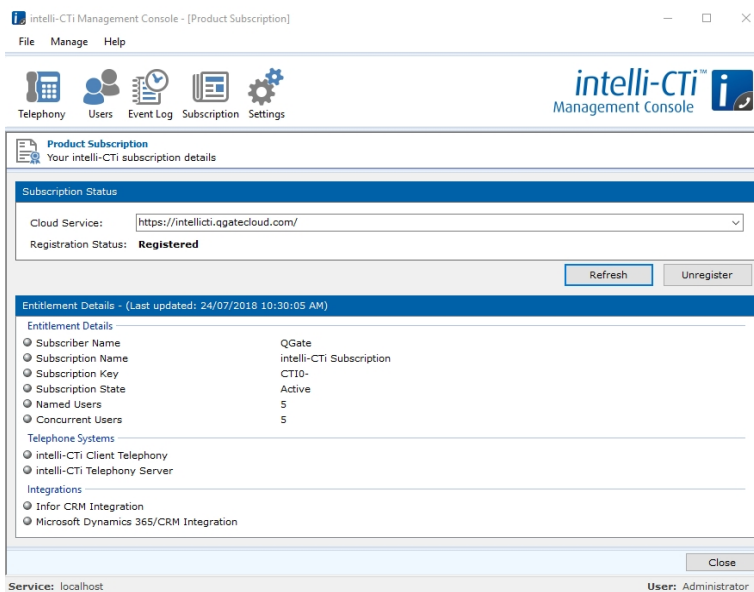
1. The first time you load the intelli-CTi™ Management Console, you will be taken to the Manage Subscriptions page.



2. If you already have your intelli-CTi™ Subscription details, please skip to the next step.

If you do not yet have a Subscription and would like to evaluate the product, you can request a free trial by simply clicking the link displayed and following the on-screen instructions.

3. Once you have your trial Subscription details, you can register your intelli-CTi Service by clicking the **Register** button, entering your Subscription details in the fields provided and submitting them.
4. If the Registration was successful, you should receive a confirmation and be presented with your intelli-CTi™ entitlement details.

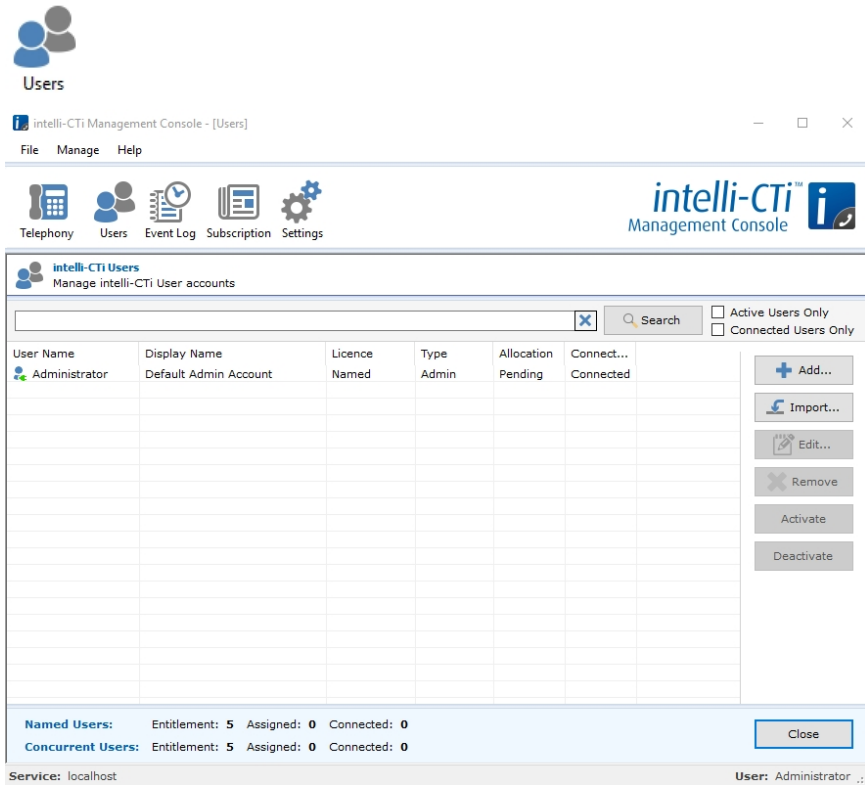


- Once you have finished registering your intelli-CTi Service, and have an active Subscription, you can click **Close**.

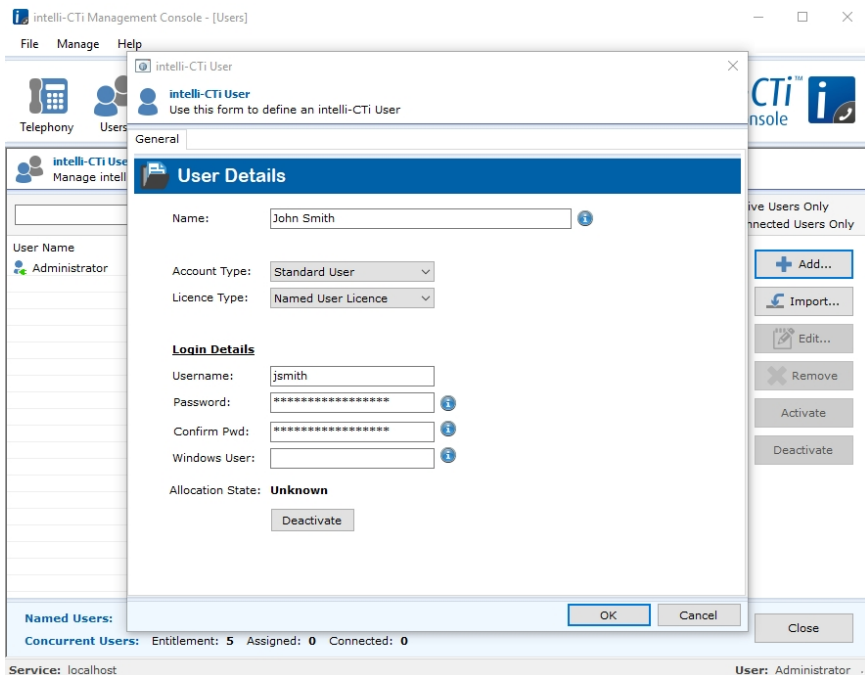
## User Management

The user Management Screen allows you to manage the user accounts that will be using intelli-CTi™.

- Click the **Users** tool-bar button to view the User management page.



- You can add additional users either by importing them from Active Directory, or by creating them manually. Create a new User now, by using either of these methods.



- Now fill in the Users relevant details. For “Account Type”; most users should be set to “Standard

User” (Only “Administrator Users can login to the intelli-CTi Service using the Management Console. If you choose to create another administrator, an email would be required for notification of changes and alerts on the intelli-CTi Service).

4. With regards to License Type; this setting will largely depend on your intelli-CTi Subscription. For either license type; users will be allowed to connect to the intelli-CTi Service as long as the current usage does not exceed the license count.
  1. **Named:** The license will be pending activation until the user first logs in to activate the license.
  2. **Concurrent:** Works on a *first come first served* basis, once the user is connected the license is assigned, but this does not affect named licenses.
5. Once you've completed the user details, click **OK** to create your new user for intelli-CTi.

**Note:** You can edit a user by selecting the user and clicking edit. You can also edit a group of users licenses, account type and activation status by selecting more than one user and clicking edit (you cannot edit a non-active user).

## Telephony Management

The Telephony Management Screen will be used to setup the integration with your on-premises telephone system. Telephony Management is only related to on-premises and not Cloud Hosted telephone systems or evaluation of the product.

### Notes:

- This is only applicable to customers with an on-premises/Network intelli-CTi™ Service, if you are using QGate's Cloud service you can skip this step.
- If you are evaluating the product without a telephone system, you can skip this section and go to the [Virtual Telephony Service \(Demo\)](#).

1. Click the **Telephony** toolbar button to enter the telephony admin area. By default you will be taken to the Site page. Here you can enter information about your location.



Telephony

2. Please enter a name for your site, and then configure the Country and Area code. Once you are done, press the **Save** button.

The screenshot shows the 'intelli-CTi Management Console - [Go Connect - Configuration]' window. The 'Telephony' toolbar button is highlighted. The 'Site' configuration page is displayed with the following fields:

- Name:** (New site)
- Region:** (Empty)
- Country:** 1 - United States of America
- Area code:** 200
- Use Windows settings (TAPI) for dialing rules

Buttons for 'Number Test', 'Save', and 'Cancel' are visible at the bottom. The status bar shows 'Service: localhost' and 'User: Administrator ...'.

- Click the **System** button to view the Telephone system page.



Here you enter information about your telephone system environment



- Select your telephone system from the list and enter the details required.  
**Note:** Trunk Access is the number that you dial for an outside line (Normally '9').
- Click the **Save** button. The application will attempt to download a list of extension numbers from your telephone system. This might take a few seconds.
- When it has finished downloading the list, click the **Extensions** button.



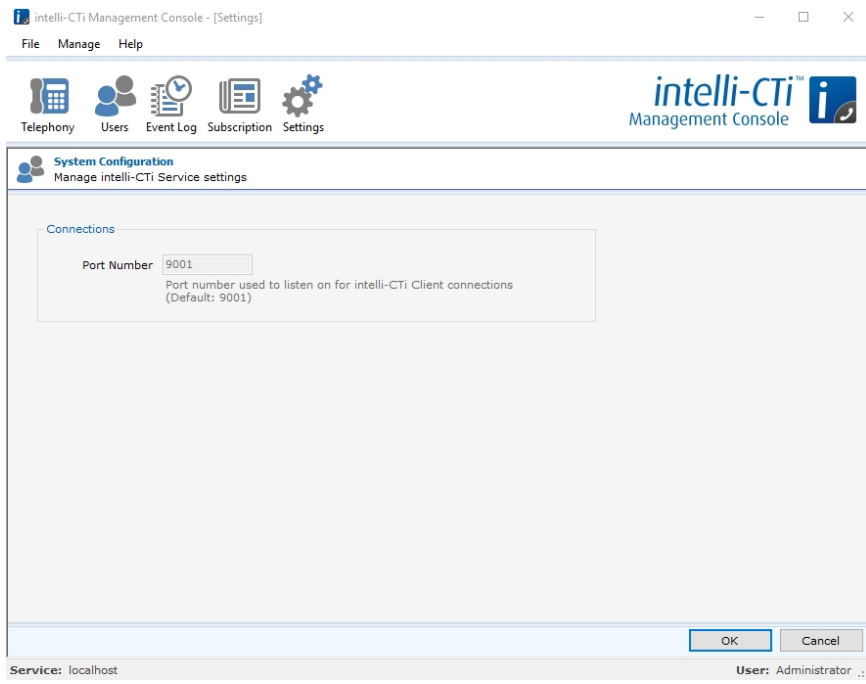
- Review the list of extension numbers and press the **Close** button to finish the installation wizard.
- To check that your intelli-CTi™ Service is now connected to your telephone system, follow the procedure in [intelli-CTi Telephony Service test](#)

## Settings

- Click the **Settings** toolbar button to view the System Configuration page.



- This screen allows you to view the current port number being used for the Service.



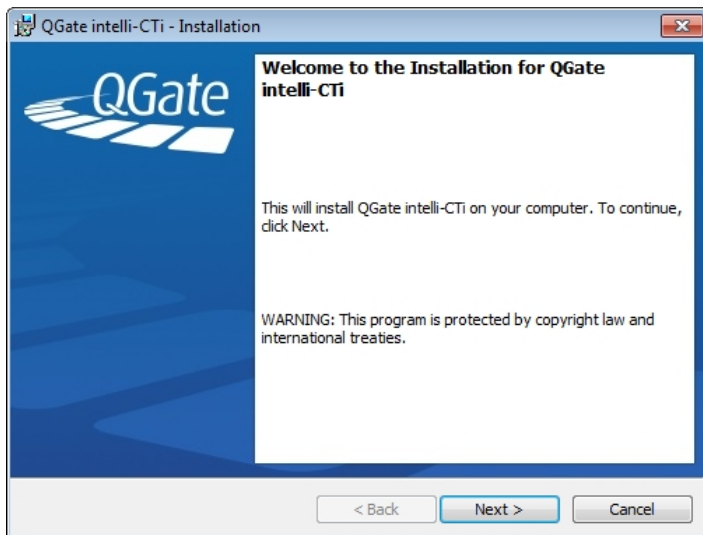


## Installing the intelli-CTi Client Application

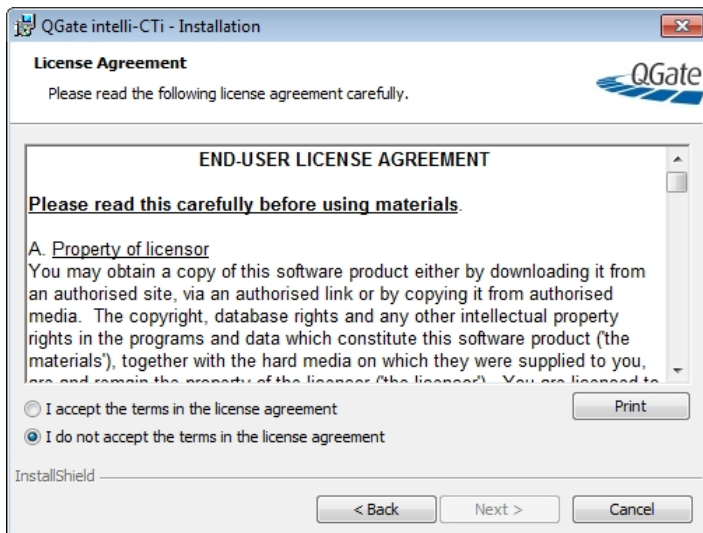
Installation of the intelli-CTi™ client application is completed by use of an install wizard.

### Installation Procedure

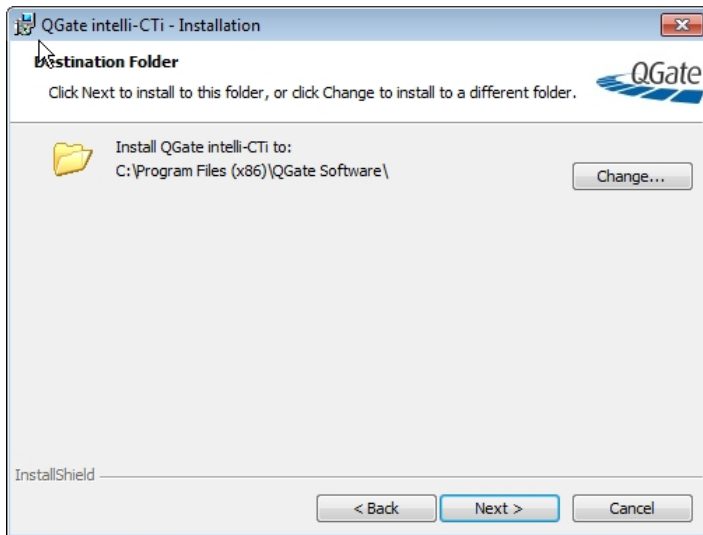
1. Run the intelli-CTi Client Setup.exe file from within the **Install** directory of your intelli-CTi™ Installation Package.



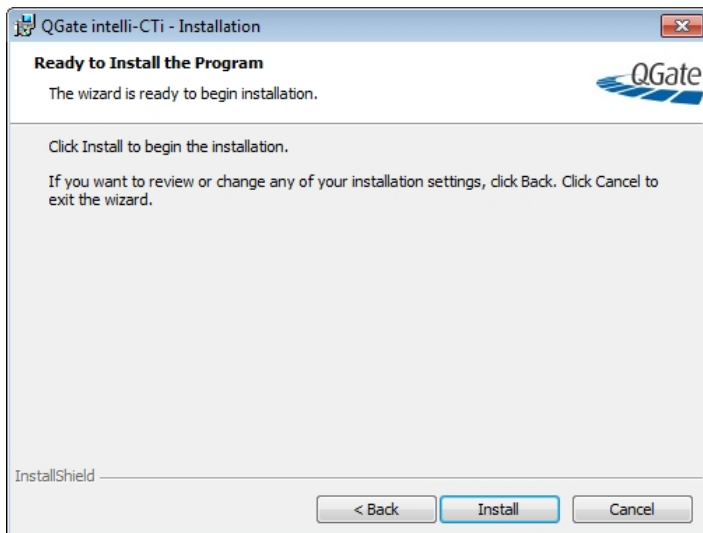
2. From the *Welcome* dialog, click on the Next > button. Note: at any time during the installation procedure, clicking the Cancel button will end the installation and roll-back any files installed to that point.



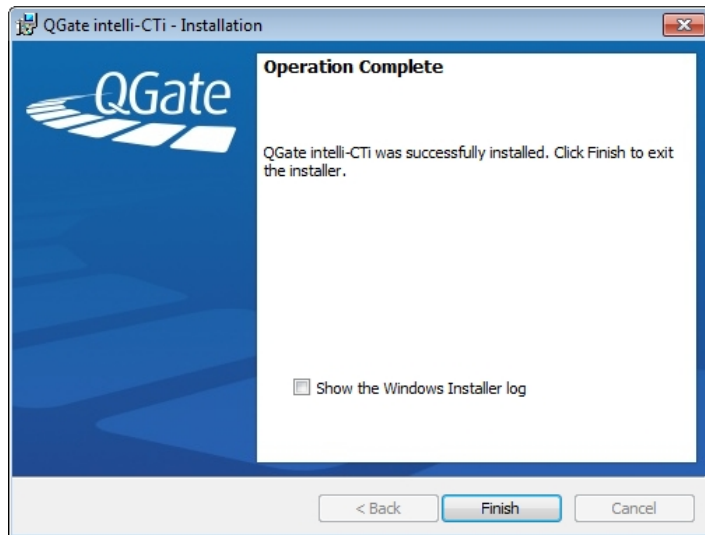
3. Read the license terms. If you do not accept the terms then cancel the installation now. If you do accept the terms then select the **I Accept...** radio button and click the **Next >** button.



4. From the *Destination Folder* dialog, click on the **Next >** button to accept the default destination folder or click on the **Change...** button to locate an alternative path and folder.



5. When you are ready to proceed, click the **Install** button.
6. After a few seconds, the installer will start to install QGate Breeze. intelli-CTi™ depends on QGate Breeze to provide its user interface.
7. When the install has finished, the following window will be displayed. Click the **Finish** button to complete the installation.



## intelli-CTi - Application Integration Support

Your intelli-CTi application is fully functional without application integration (e.g. To customer database applications), and can be used standalone as an aid to standard telephony operations. Integration with other applications, however, does provide a higher level of value added services.

To achieve application integration with other software components, see the appropriate intelli-CTi Implementation Guides.

For a list of supported applications or for application integration possibilities, please contact your intelli-CTi software provider or contact QGate Software.

## Configuring intelli-CTi Client Settings

This section details how to configure your intelli-CTi installation and the following components:

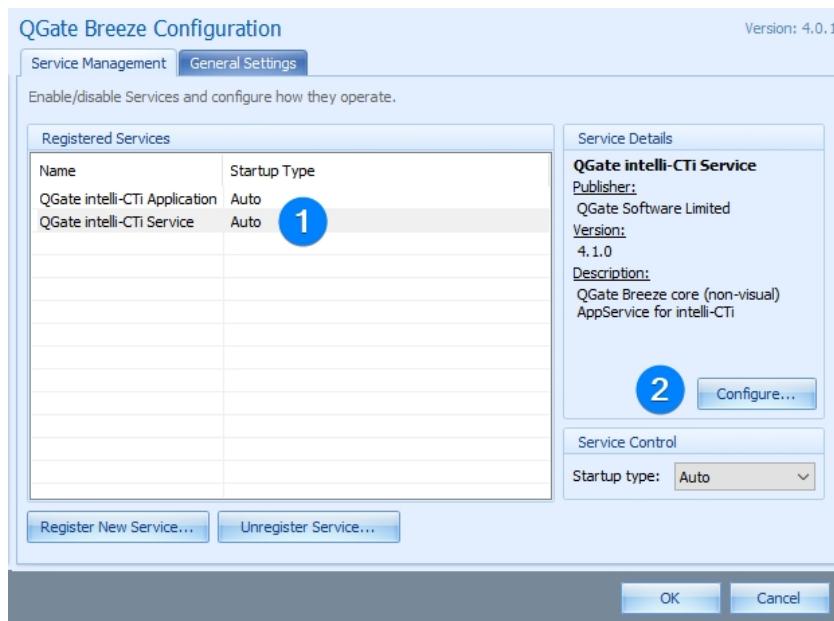
- Configuring intelli-CTi Connections
- Configuring intelli-CTi System Settings

### Configure Service Connection Type



To configure your intelli-CTi™ System Connection type, Click on Start and run QGate Breeze Settings as Administrator. This process will display the QGate Breeze Configuration Panel.

1. Select **QGate intelli-CTi™ Service** from the Registered Service list, displaying the Service Details of the QGate intelli-CTi™ Service.
2. Selecting **Configure...** will prompt you with the intelli-CTi™ Configuration Panel.



3. From the intelli-CTi™ Configuration Panel you can select one of the following intelli-CTi™ service type modes:
  1. Network Service
  2. Cloud Service
  3. Virtual Telephony Service (Demo)

*Note: If you are evaluating the product without a telephone system, you can skip this section and go to the [Virtual Telephony Service \(Demo\)](#).*

## Network Service

The intelli-CTi™ product comes with a Network Service, which allows connecting to an on-site server running the intelli-CTi™ Service. To connect to a Networked intelli-CTi™ Service do the following:

1. After navigating to the connection service, select **Network Service** from the **intelli-CTi™ Service Type** drop down menu.
2. Enter your intelli-CTi™ Service **DNS name** or **IP Address** for connecting to the Service.
3. Specify the type of authentication you would like to use to connect to the intelli-CTi™ Service (**Windows Authentication** or **Specific intelli-CTi™ User**). If you specify to use a intelli-CTi™ User you will be required to enter the user name and password for authentication.

intelli-CTi Configuration

intelli-CTi™

General Advanced

intelli-CTi Service Type: Network Service 1

intelli-CTi Network Service connection settings  
Use this option to connect to your existing intelli-CTi Service, using the details below.

intelli-CTi Service: 2

Authentication:  Windows Authentication 3  
 Specific intelli-CTi User

Username: 4

Password: 4 Connect... 4

5 [Show Additional Settings](#)

4. When you're ready, clicking **Connect...** will attempt to make a connection to the service running the intelli-CTi™ Service. If a connection is successful a message will be displayed, for any reason to why a connection would not connect would also be displayed on failure to connect.
5. Some additional settings related to connecting to your intelli-CTi™ Service can be found by clicking **Show Additional Settings**.

Username: 4

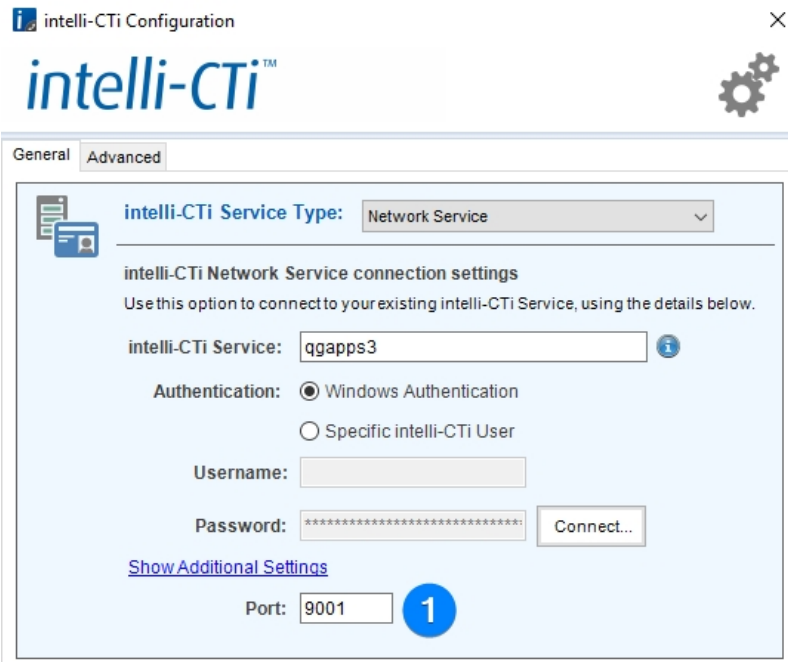
Password: 4 Connect... 4

[Show Additional Settings](#)

✓ Connect successful

### Additional Settings

If your intelli-CTi™ Service is running on a non-default port, you can adjust the connection port from the Additional **Settings** after clicking **Show Additional Settings**.

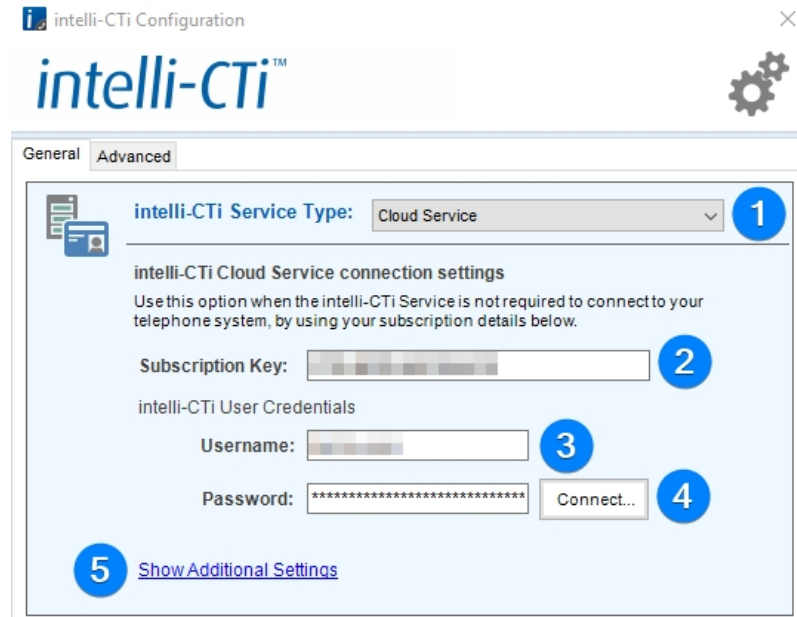


Clicking **OK** will close the intelli-CTi™ Configuration panel, if you have QGate Breeze the configuration panel will ask if you would like to restart now or later.

## Cloud Service

The intelli-CTi™ product comes with an Cloud Service provided by QGate, for customers of hosted telephone systems, which allows connecting to QGate's hosted service running the intelli-CTi™ Service. To connect to the hosted intelli-CTi™ Service do the following:

1. After navigating to the connection service, select **Cloud Service** from the **intelli-CTi™ Service Type** drop down menu.
2. Enter your **intelli-CTi™ Cloud Service** Subscription Key.
3. Specify the **username** and **password** to authenticate with the Cloud Service, username and password are the only authentication methods currently available for cloud authentication.



4. When you're ready, clicking **Connect...** will attempt to make a connection to the service running the intelli-CTi™ Service. If a connection is successful a message will be displayed, for any reason to why a connection would not connect would also be displayed on failure to connect.
5. Some additional settings related to connecting to your intelli-CTi™ Service can be found by clicking **Show Additional Settings**.

### **Additional Settings (Additional Settings)**

1. If your intelli-CTi™ Cloud Service is running on a non-default addressing (you would be specified if so), you can adjust the **Addressing** and **Literal Addressing**.
2. If your intelli-CTi™ Cloud Service is running on a non-default port (you would be specified if so), you can adjust the connection port.

**intelli-CTi Service Type:** Cloud Service

---

**intelli-CTi Cloud Service connection settings**  
Use this option when the intelli-CTi Service is not required to connect to your telephone system, by using your subscription details below.

**Subscription Key:** [Redacted]

**intelli-CTi User Credentials**

**Username:** [Redacted]

**Password:** [Redacted]

[Show Additional Settings](#)

**Cloud Service Address:** intelliCTiCloud.com **1**

Use Literal Addressing

**Port:** 443 **2**

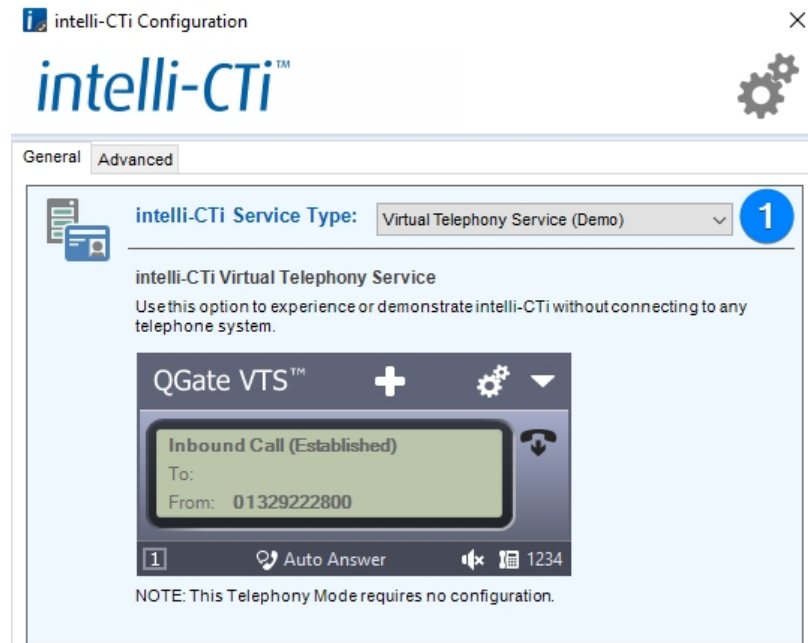


## Virtual Telephony Service (Demo)

The intelli-CTi™ product comes with a free Virtual Telephony Server (VTS), which allows demonstration, training and development to be carried out without being connected to a real telephone system.

If you simply wish to demo intelli-CTi™ (not connected to a real telephone system), the intelli-CTi™ VTS mode provides the perfect setup to simulate telephony activity and demonstrate intelli-CTi™ working with your CRM system.

1. After navigating to the connection service, select **Virtual Telephony Server (Demo)** from the **intelli-CTi™ Service Type** drop down menu.
2. Clicking **OK** will close the intelli-CTi™ Configuration panel, if you have QGate Breeze the configuration panel will ask if you would like to restart now or later.



## Telephony Connection Types

The intelli-CTi Telephony Connections are the components of intelli-CTi which enable connectivity to your telephone system / CTI service.

The following intelli-CTi Telephony Connections are available:

- **intelli-CTi Telephony Service:**  
This connection type provides support for telephone systems that are connected using the intelli-CTi Service. All the components required for this connection are installed as part of the standard intelli-CTi client software installation.
- **intelli-CTi Skype for Business Client:**  
This connection type provides support for Microsoft Skype for Business. This option requires Skype for Business to already be installed, configured and running before use.
- **intelli-CTi Go Integrator (for Broadworks) Client:**  
This connection type provides support for the Go Integrator (for Broadworks) client. This option requires the Go Integrator client to already be installed, configured and running before use.
- **Virtual Telephony Server™ (VTS):**  
This connection type provides a virtual telephony switch system.

The key aspect of the VTS connection type is to provide a virtual telephony environment in which to develop and test your CTI solutions, without the need for expensive hardware. What's more, with the VTS technology, you can perform presentations of your CTI solutions anytime, anywhere, all from a single laptop computer.

The VTS technology is a free component of the intelli-CTi product. For more details on how to use the Virtual Telephony Server, [see the intelli-CTi User Guide](#).

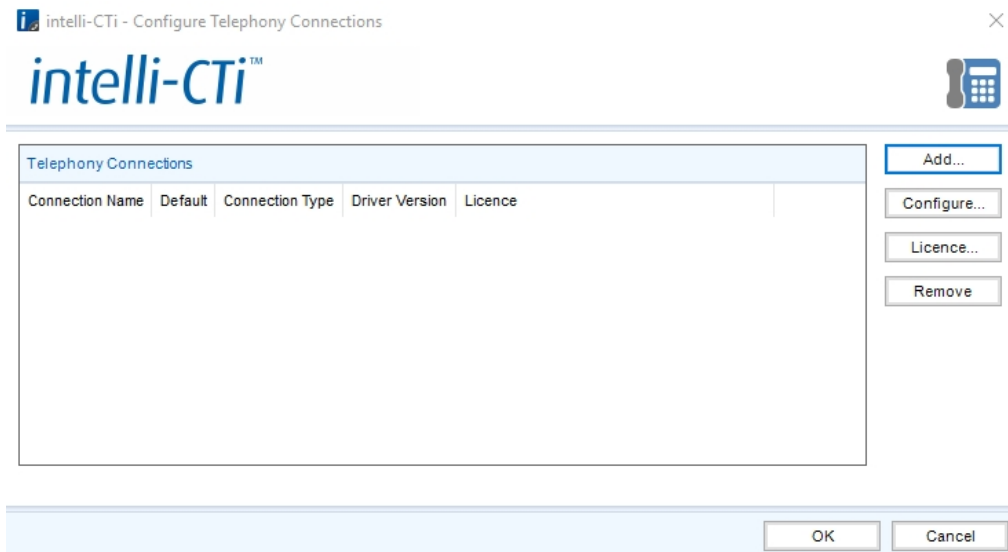
- **Other Connection Types:**  
Other connection types may also be available. Please contact QGate Software for more information.

## Configure Telephony Connections

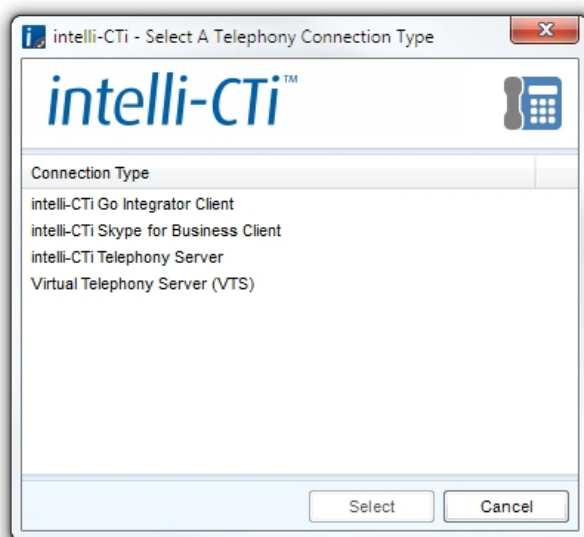
Once you have successfully connected to an intelli-CTi service (or have a selected to use the VTS/Demo mode)



1. Click on the Configure intelli-CTi Connections... button to open the *Configure Telephony Connections* window.

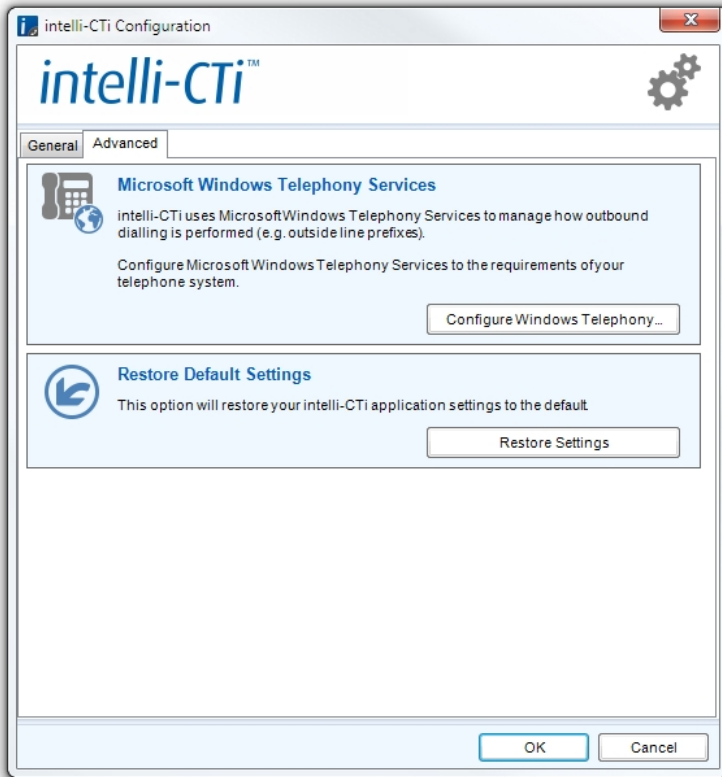


2. Click the **Add** button to add a telephony device to the list. This will bring up the *Select a Telephony Connection Type* window, where you can choose what type of connection you are adding.



3. Click on the Configure... button to configure the currently highlighted connection type.
  - If you are configuring an intelli-CTi Telephony Service connection, then see [Configuring intelli-CTi Telephony Service connections](#) for more information.

- You do not need to configure Virtual Telephony Server connection type, as it comes with default settings.
4. Click on the Remove... button to remove a device from the list.
  5. Click on the Advanced tab.

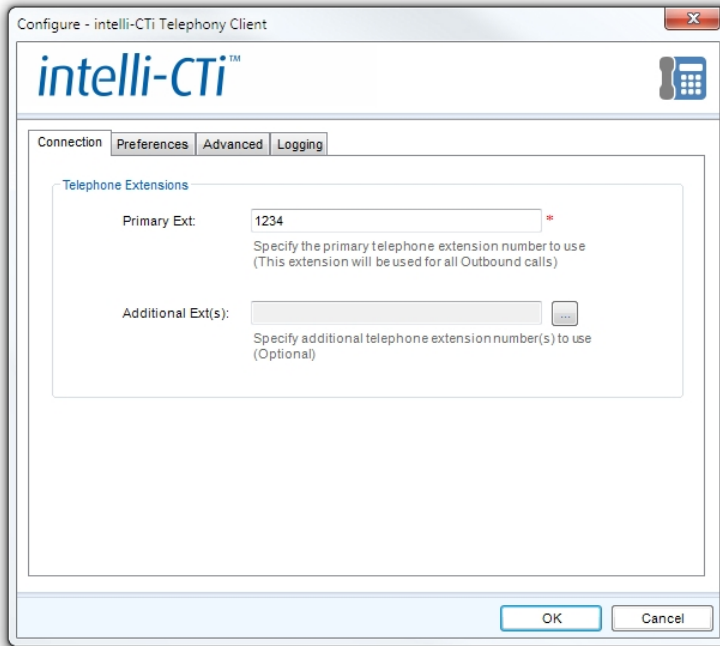


6. On the Advanced settings tab, you can Configure Windows Telephony. This section provides the ability access to the Microsoft Windows Telephony Services configuration (such as client-side dialing rules for advanced setups).
  7. You can also Restore Default Settings. This action will restore your intelli-CTi application settings back to the default.
  8. Click the OK button to close the intelli-CTi Configuration dialog.
- If you have made changes to your intelli-CTi configuration, these changes will not take effect until you next restart your intelli-CTi application.

## Configuring intelli-CTi Telephony Service connections

The following steps outline how to configure an **intelli-CTi Telephony Service** connection type.

1. Start the intelli-CTi Settings configuration program from the Windows Control Panel.
2. Click the **Configure intelli-CTi Connections...** button on the General tab.
3. Highlight the **intelli-CTi Telephony Service** connection and click the **Configure...** button.



4. Enter or change the extension number that you wish to monitor.
  - If required, you can also specify **Additional Extensions** to be monitored.

**Note:** Primary extension will always be used for Outbound calls.
5. Click the **Close** button to close the Configure – intelli-CTi Telephony Client dialog.
6. Click the **Close** button to close the *Configure Telephony Connections* dialog.
7. Click the **OK** button to commit your changes and close the intelli-CTi Configuration window.

Note: You must restart intelli-CTi for any configuration changes to take effect.

## Testing intelli-CTi

### Installation / Set-up Check List

To ensure your intelli-CTi™ installation is complete and ready for testing, the following check list items should have been completed:

- Installation of the intelli-CTi™ Service
- Installation of the intelli-CTi™ client
- Configuration of intelli-CTi™ system settings
- Configuration of Windows Telephony (if applicable)

### Testing the intelli-CTi Installation

To test that the intelli-CTi application has been successfully installed and configured, ensure the following tasks can be performed:

#### intelli-CTi Telephony Service test

**Note:** This test is a true CTI environment test and does not apply to the Virtual Telephony Server™ environment.

The first test is to ensure that the intelli-CTi Service is installed, running and connected to your telephone system.

1. Open up the intelli-CTi Admin Configuration application and click on the **Telephony** toolbar button.
2. Select the **Extensions** section.
3. Make a telephone call using one of the extensions in the list and ensure that its state changes to OFFHOOK.

#### Client Initialisation Test



Start your QGate Breeze application from the icon provided  
( Start, All Programs, QGate Breeze, QGate Breeze...)

Ensure your intelli-CTi™ application can start successfully.  
If initialization was successful, continue to the next test.

#### Dial Out Test

Once the previous tests have been completed successfully, the final test is to dial out. Using the telephone handset keypad, dial a valid destination number.

**Tip:** We recommend the destination number for this test is an extension number on your telephone system, preferably within earshot, to ensure you are fully aware of the results.

Once the dialing process is complete, a new call will be displayed in the intelli-CTi window.

When you hang up the call, the display in intelli-CTi will indicate that the call is now idle.

If this test was successful, you have successfully installed and configured intelli-CTi. If not, consult the [troubleshooting section](#).

## Installing Unified Service Desk Integration

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### Prerequisites

This guide assumes a working knowledge of Unified Service Desk administration skills and have met the intelli-CTi™ for Unified Service Desk System Requirements here: <https://www.intellicti.com/help/sysreqs/>

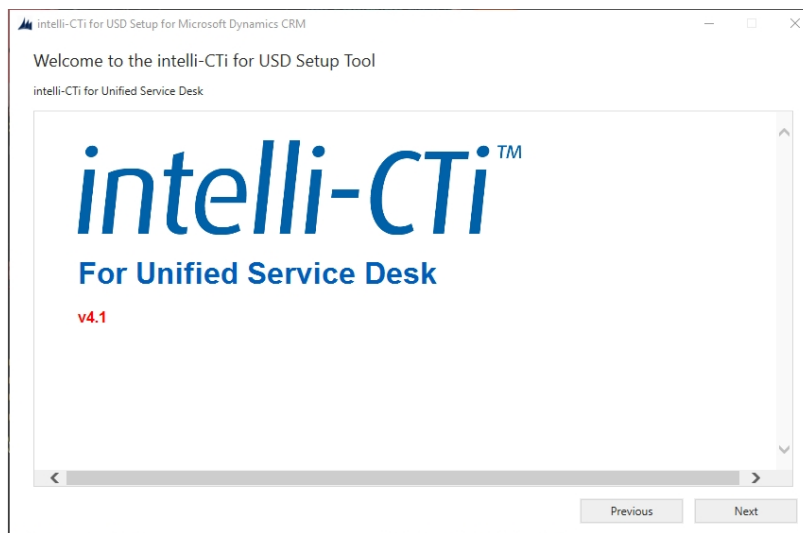
## Unified Service Desk Package Installation

### Installing Unified Service Desk Package

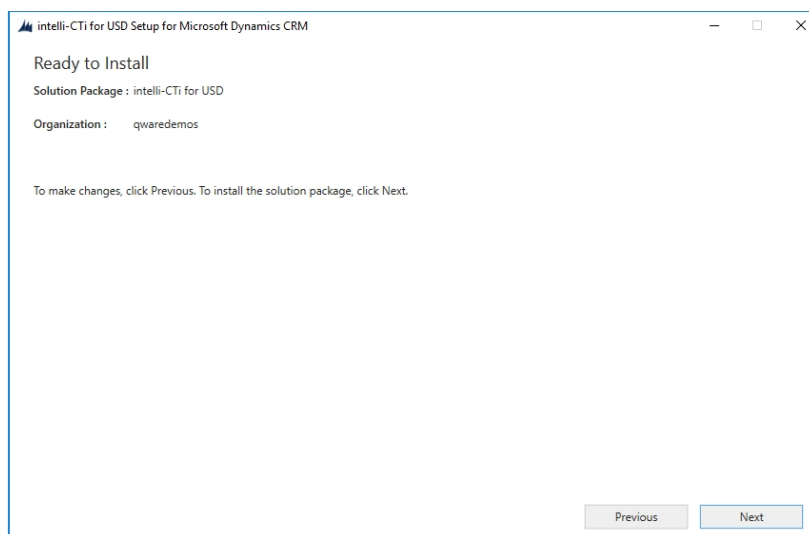
Installation of the intelli-CTi™ for Unified Service Desk is completed by use of a intelli-CTi Package Deployer.

#### Installation Procedure

1. Run the **PackageDeployer.exe** which can be found in the **Install** directory of your intelli-CTi™ for Unified Service Desk Package under **PackageDeployer**. The PackageDeployer will start.
2. Click **Continue** to proceed onto the login page.
3. Fill in the correct information related to your organizations instance which will be used for intelli-CTi™ for Unified Service Desk.
4. Click Login to process.

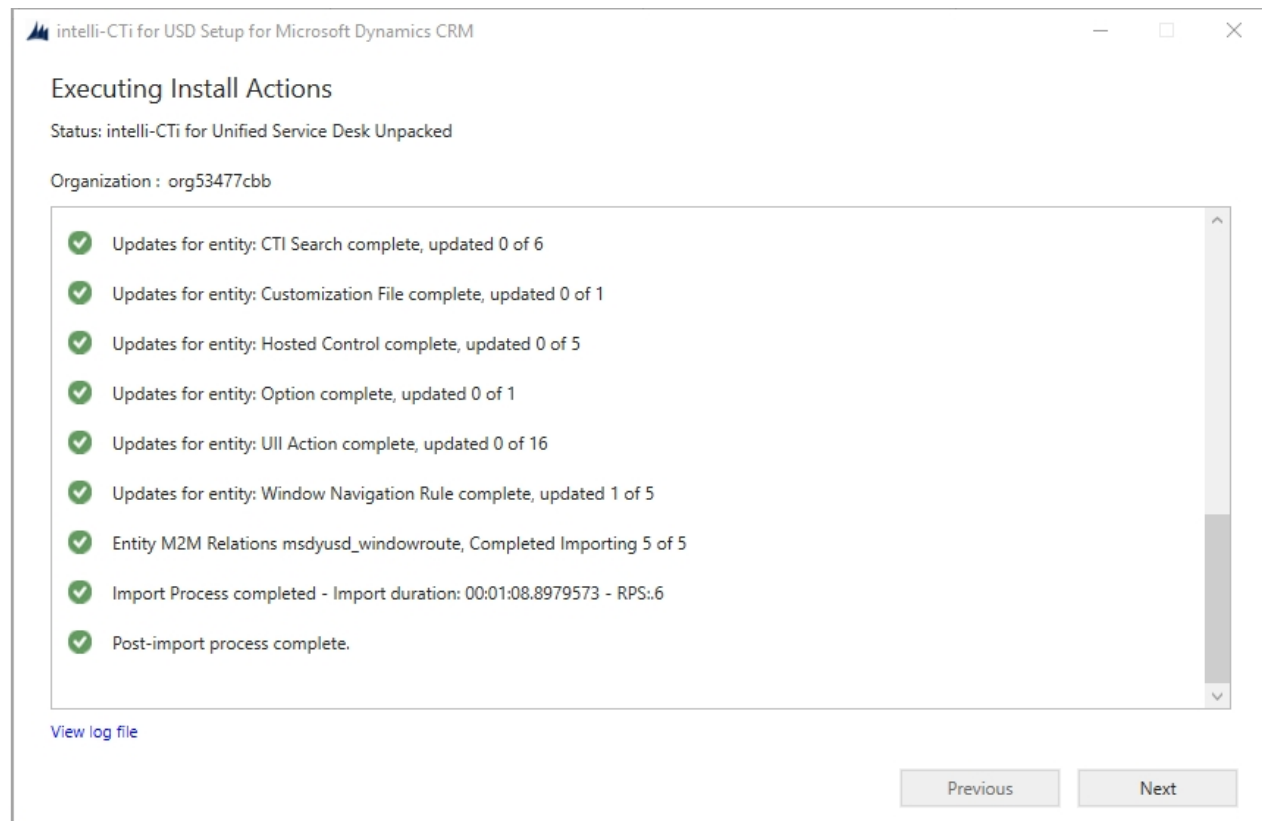


5. On authentication you will be prompted with a welcome screen with preview information and version, press **Next** to continue.



6. Confirm the correct organization is displayed and click **Next** to start the pre-installation checks of the intelli-CTi™ for Unified Service Desk package.
7. On completion of all pre-installation checks, click **Next** to start the installation.





8. Once installation is complete, a small confirmation text will display "**Post-Import process complete**", click **Next** to complete installation.
9. Done

## Unified Service Desk: User Settings

If you already have an existing Unified Service Desk instance setup and configured to the way you like, you most likely are using **User Settings** configurations and restricting the configurations per user. This means that you are going to have to add additional configurations that are required by intelli-CTi™ for Unified Service Desk to function correctly. The additional configurations are referenced in the customizations reference of this document: intelli-CTi™ [Unified Service Desk Customizations](#).

## Security Role: intelli-CTi User

In addition to new configurations, the intelli-CTi Package Deployer also included a new Security Role called "intelli-CTi™ User". You will need to add this Security Role to all Microsoft Dynamics 365 users who intend to use intelli-CTi™.

The intelli-CTi Package Deployer process is now complete and you can exit Microsoft Dynamics 365 after setting up the users with the intelli-CTi™ Security Role.

## Configuring intelli-CTi for Unified Service Desk Settings

This section details how to configure your intelli-CTi™ for Unified Service Desk installation and the following components:

- Configuring Unified Service Desk CTi Control themes

### Configuring Unified Service Desk CTi Control Theme

intelli-CTi™ for Unified Service Desk supports three different types of theming that can be applied based on the color scheme that is currently being used within Unified Service Desk. These themes are changed globally for all users and can be set within the configuration section of USD. The supported colors are as follows:

1. Gray - 0
2. White - 1
3. Blue - 2

To update the theme option you can do the following:

1. Login to the web interface of your Microsoft Dynamics 365 Instance
2. Navigate to settings and under the **business** section select Unified Service Desk.
3. Select **Options**
4. Locate and open the record called **QGateColorCode**
5. Set the value to the corresponding **number** value for your color.
6. Done

The screenshot shows the configuration page for the 'QGateColorCode' option. The page title is 'OPTION : INFORMATION' and the option name is 'QGateColorCode'. The 'General' tab is selected, showing the following details:

Global Option *	Others	Owner *
Name *	QGateColorCode	[User Avatar]
Value *	0	

After this is complete, any one starts up Unified Service Desk will be greeted by the updated theme.

## Migrate telephone numbers into intelli-TNS

Although the new **intelliTNS** entity for processing telephone numbers has been installed, it doesn't yet contain any data. To create intelliTNS entities for all of your existing Accounts, Contacts and Leads, you should run the **intelli-TNS Data Load Utility**.

The intelli-TNS Data Load Utility allows batch population of intelli-TNS entities from existing Account, Contact and Lead records. This typically only needs to be run once, when you install intelli-CTi for the first time. However, you may need to re-run the utility after doing a data import.

### Instructions

1. Run the **QGate.TNSDataLoader.Application.exe** from the following directory on your intelli-CTi for Microsoft Dynamics Installation Package:

```
\Install\intelli-TNS Data Loader
```

intelli-TNS Data Load Utility - Login

Microsoft Dynamics CRM

**Microsoft CRM Service (CRM Online)**  
Specify your Microsoft Dynamics CRM connection details

Microsoft Dynamics CRM Service Connection

qgate demo

Web Site: disco.crm4.dynamics.com  
Organization: QGate

Login Credentials

**Authentication**

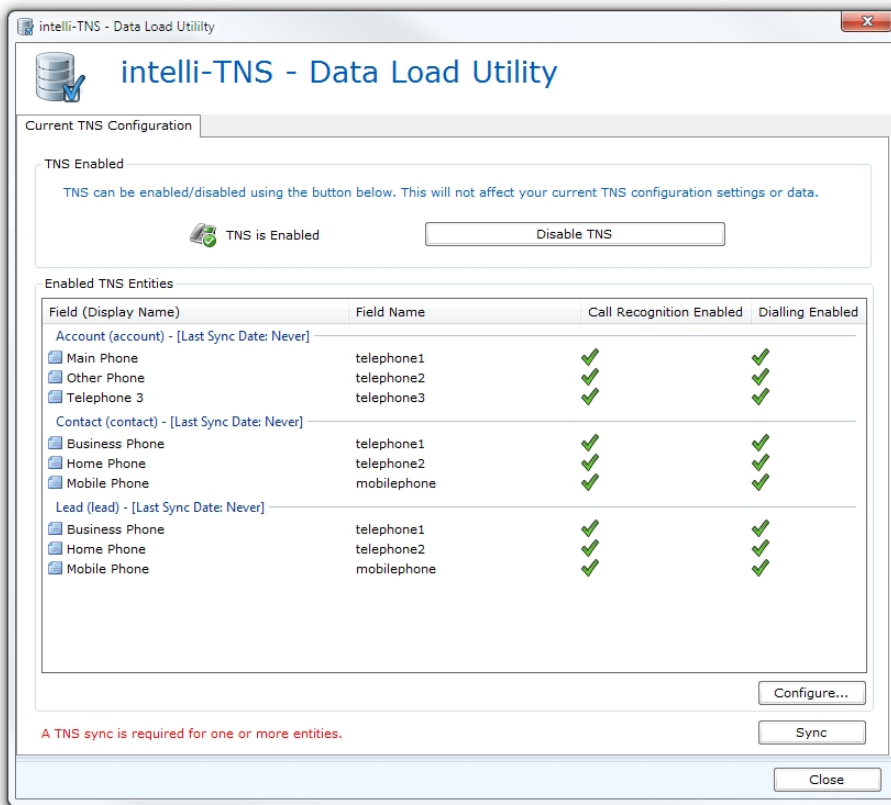
User Name: admin@qgsl02.onmicrosoft.com  
Password: \*\*\*\*\*  
 Remember Me

Version: 4.0.1.0

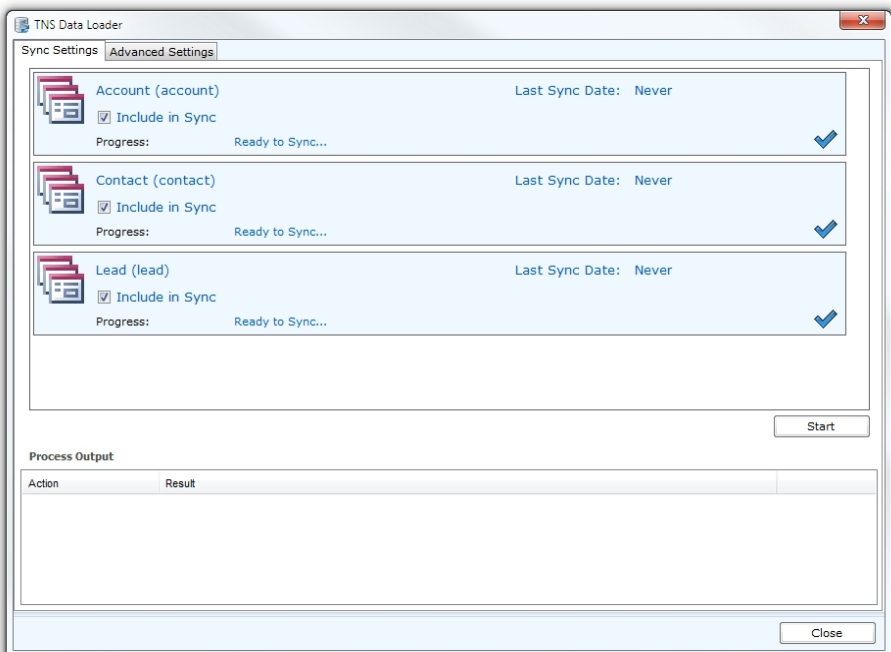
Connect Cancel

2. Select your CRM Service Connection from the drop down box, or create a new connection by clicking on the [...] button.
3. Specify your authentication details and click the **Connect** button.
4. Once you have connected successfully, there will be a short pause while the application retrieves data from Dynamics CRM.





- By default, the main telephone fields for Account, Contact and Lead will be used for both Call Recognition and for Dialling support. If you wish to change this, click **Configure...** to change fields and settings accordingly.
- Now click **Sync** to move to the next stage.



- Select which entity types you wish to capture into intelli-TNS.
- Inbound caller recognition will only function for entities that you have loaded into intelli-TNS.**
- Click the Start button and wait for the data load to complete.
  - Once the data migration process is complete, you can close the intelli-TNS Data Load Utility.

## Testing intelli-CTi for Unified Service Desk

### Installation / Set-up Check List

To ensure your intelli-CTi™ for Unified Service Desk installation is complete and ready for testing, the following check list items should have been completed:

- intelli-CTi™ has been installed.
- intelli-CTi™ TNS has been ran on your Microsoft Dynamics 365 instance.
- intelli-CTi™ for Unified Service Desk Package has been installed via the intelli-CTi Package Deployer.
- intelli-CTi™ Users have the intelli-CTi™ Security Role.

### Testing the intelli-CTi Installation

To test that the intelli-CTi™ for Unified Service Desk application has been successfully installed and configured, ensure the following tasks can be performed:

#### Client Initialisation Test

Start your Unified Service Desk application from the start menu (Start, All Programs, Unified Service Desk) Ensure your intelli-CTi™ Unified Service Desk application can start successfully with the correct CTi controls being displayed at the top of the application.



If initialization was successful, continue to the next test.

#### Dial Out Test

Once the previous tests have been completed successfully, the final test is to dial out. Using the telephone handset keypad, dial a valid destination number.

**Tip:** We recommend the destination number for this test is an extension number on your telephone system, preferably within earshot, to ensure you are fully aware of the results.

Once the dialing process is complete, a new call will be displayed in the Unified Service Desk window.

When you hang up the call, the display in Unified Service Desk will indicate that the call is now idle.

If this test was successful, you have successfully installed and configured intelli-CTi™ Unified Service Desk. If not, consult the troubleshooting.

## Unified Service Desk Customizations Reference

### Hosted Controls

- QGate Desktop Manager
- QGate intelli-CTi Connector
- QGate intelli-CTi Core Panel
- QGate Search

### Action Calls

- QGate Click To Dial (Make Call)
- QGate intelli-CTi - Open Entity
- QGate Search - Navigate (MultiEntity)
- QGate Search - TNS
- QGate Search TNS - Close
- QGate Set CTI Color

### Options

- QGateColorCode

### Customization File

- QGate intelli-CTi Supporting DLLs

### Window Navigation Rules

- QGate Click-To-Dial (Skype)
- QGate Click-To-Dial (tel)
- QGate Click-To-Dial (lync15)
- QGate Rest Route - TNS
- QGate Rest Route

## Uninstalling intelli-CTi

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This section outlines the steps necessary to uninstall intelli-CTi, for both the Service installation and the Client installation.

**Please note:** to avoid potential issues, we recommend you uninstall all Client installations before removing the Service install.

### Uninstalling the intelli-CTi Service

1. Please close any open applications
2. Open up the Windows Control Panel
3. Open "Programs and Features" (or "Add/Remove Programs" depending on your version of Windows)
4. Uninstall the following programs:
  1. **QGate intelli-CTi Service**
  2. **QGate intelli-CTi Device Service**
5. Done

### Uninstalling an intelli-CTi Client

1. Please close any open applications
2. Open up the Windows Control Panel
3. Open "Programs and Features"  
(or "Add/Remove Programs" depending on your version of Windows)
4. Uninstall the following programs (in this order):
  1. **QGate intelli-CTi**
  2. **QGate Breeze**
5. Done

## Uninstalling Unified Service Desk Integration

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This section outlines the steps necessary to uninstall intelli-CTi™ for Unified Service Desk.

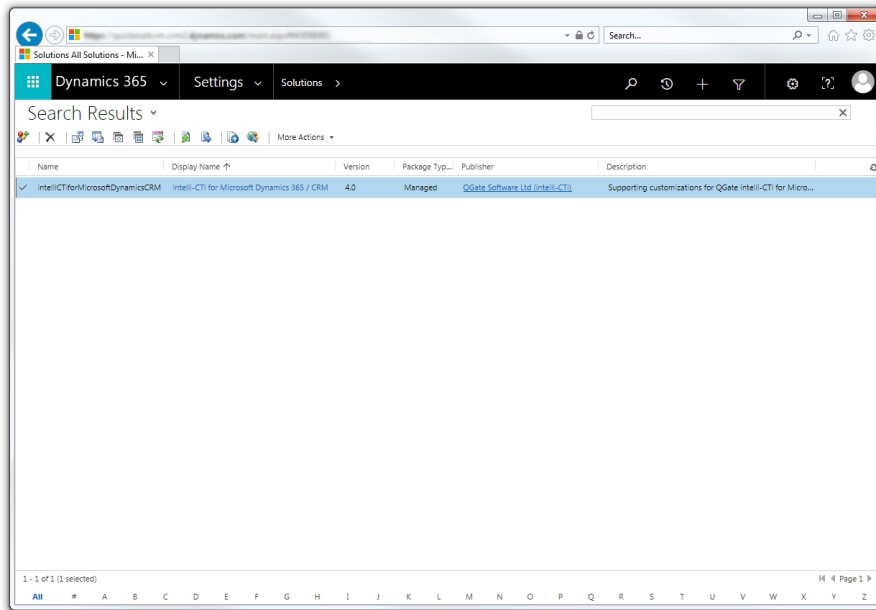
### Uninstalling the Unified Service Desk Records


To remove the records from Microsoft Dynamics 365, remove the referenced hosted controls located in the [installation of Unified Service Desk Customizations Reference](#) from the corresponding sections of the Unified Service Desk Configurations. Otherwise create a new user configuration that does not include the following configuration records.



## Uninstalling the Dynamics Solution

1. Open the Microsoft Dynamics 365 web client.
2. Select **Settings** then **Solutions** from the navigation bar on the left-hand side of the screen.



3. Select the “intelli-CTi for Microsoft Dynamics 365” Solution from the list.
4. Click on the Delete button.  
 Delete
5. Confirm that you want to remove the Solution.
6. Done

## Technical Support and Troubleshooting

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In the interest of providing customers with the latest product support information, QGate provides the following online resources within our intelli-CTi™ Help Center website:

### General Support

For general technical support information, please visit the main product support page:

[www.intellicti.com/help/](http://www.intellicti.com/help/)

### Troubleshooting

For troubleshooting common problems and scenarios relating to intelli-CTi, please visit the troubleshooting page:

[www.intellicti.com/help/troubleshooting/](http://www.intellicti.com/help/troubleshooting/)

### System Requirements

For information regarding the minimum system requirements for installing and running intelli-CTi, please visit the product system requirements page:

[www.intellicti.com/help/sysreqs/](http://www.intellicti.com/help/sysreqs/)

### Product Information

For more information about intelli-CTi, please visit the intelli-CTi product website:

[www.intellicti.com/](http://www.intellicti.com/)

## Fault Reporting

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If you wish to report a fault or an issue with intelli-CTi, please contact your intelli-CTi software supplier.

## Upgrades and Service Releases

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Revision upgrades and service releases of intelli-CTi are available from your intelli-CTi software supplier.

**Warning:** We strongly recommend you review the release information provided with each release, to ensure each upgrade is suitable to apply. If you are in any doubt, we recommend you contact your intelli-CTi software supplier.

All major version release upgrades will require the purchase of a new license.

## Systems Integration

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For advice on integrating intelli-CTi into other products and applications, please contact your intelli-CTi software supplier.