intelli-CTi™

Version 4.2

Installation and Configuration Guide

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Overview

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

Other intelli-CTi Reference Information

For information on using intelli-CTi, see the *intelli-CTi – User Guide*.

For information on developing application integration with intelli-CTi, see the *intelli-CTi – Software Developers Kit (SDK).*
(contained within the **SDK** directory of your intelli-CTi Installation Package).

For additional reference information on intelli-CTi, see the intelli-CTi Help Center at www.intellicti.com/help.

For up to date information on intelli-CTi, please visit the product website at www.intellicti.com.

System Requirements

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/

Telephony System Support

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

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.

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.

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intelli-CTi Installation

Installation Outline

The installation / set-up of intelli-CTi requires installation of some or all of the following components:

intelli-CTi Service Software

The intelli-CTi Service installation provides the means to communicate with your telephone system. It makes a connection to your telephone system and publishes that connection to the workstations that are running intelli-CTi.

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 do not need to install the intelli-CTi Service. You can simply use the QGate Virtual Telephony Server (VTS) that is included as part of the client install.

For more information see *Installing the intelli-CTi* Service *Software* on page 10.

Telephony System Integration Requirements

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.

intelli-CTi Client Application (Including QGate Breeze)

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

For more information see *intelli-CTi Client Application (Including QGate Breeze)* on Page 9.

Upgrading from a Previous Version of intelli-CTi

If you are upgrading from a previous version of intelli-CTi (version 2.1 or earlier), we strongly recommend you uninstall any previous installations first.

Uninstalling intelli-CTi should be performed using the Windows Add and Remove Programs option. If re-boots are required, we recommend performing those also.

Installing the intelli-CTi Service Software

Installation of the intelli-CTi Service is completed by use of an install wizard.

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:
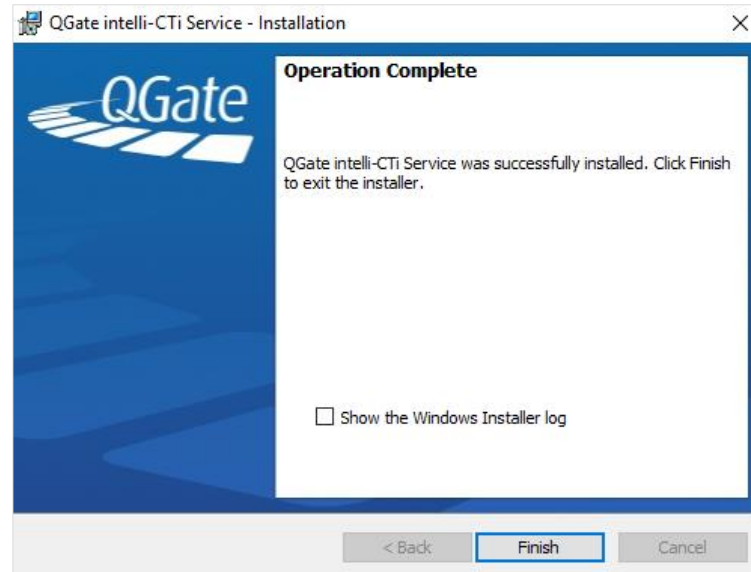
5. Click the **Finish** button.

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.

Network Service

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.

   a. 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.

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.

Cloud Service

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.

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**.
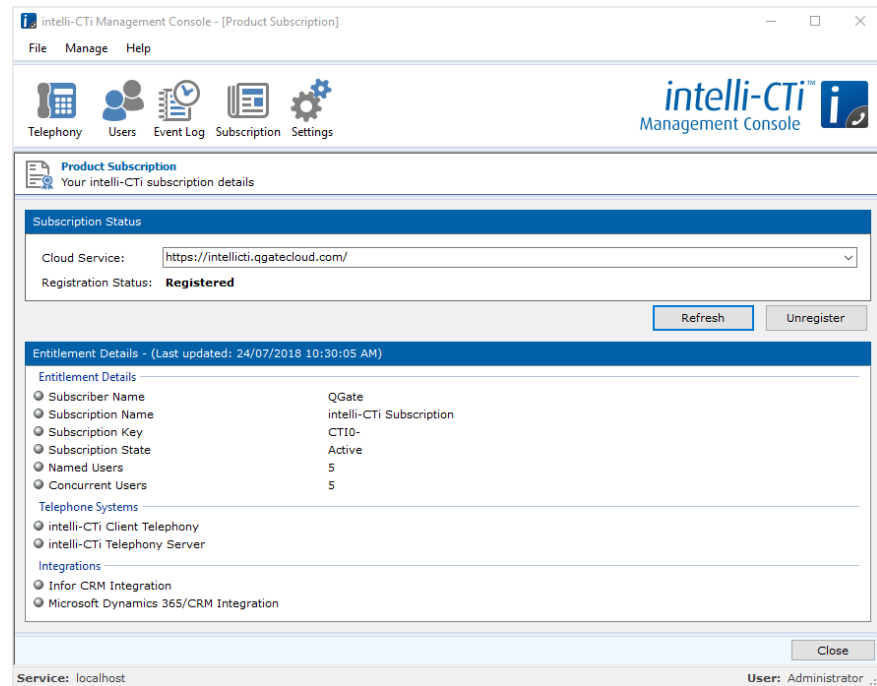
Subscription Management

1. The first time you load the intelli-CTi Management Console, you will be taken to the Manage Subscriptions page. This screen allows you to manage your intelli-CTi Service registration, as well as seeing your intelli-CTi Subscription/Licence entitlement details.

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1. 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.

2. 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.

3. If the Registration was successful, you should receive a confirmation and be presented with your intelli-CTi entitlement details.
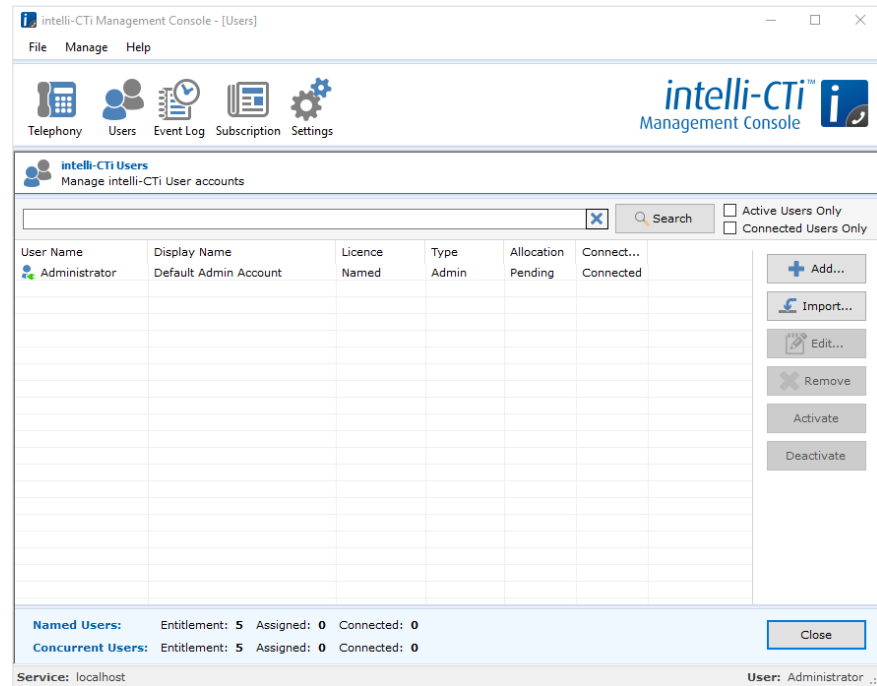

4. Once you have finished registering your intelli-CTi Service, and have an active Subscription, you can click **Close**.

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User Management

1. Click the **Users** toolbar button to view the User management page.

Users

2. This screen allows you to manage the user accounts that can use intelli-CTi..

3. 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.

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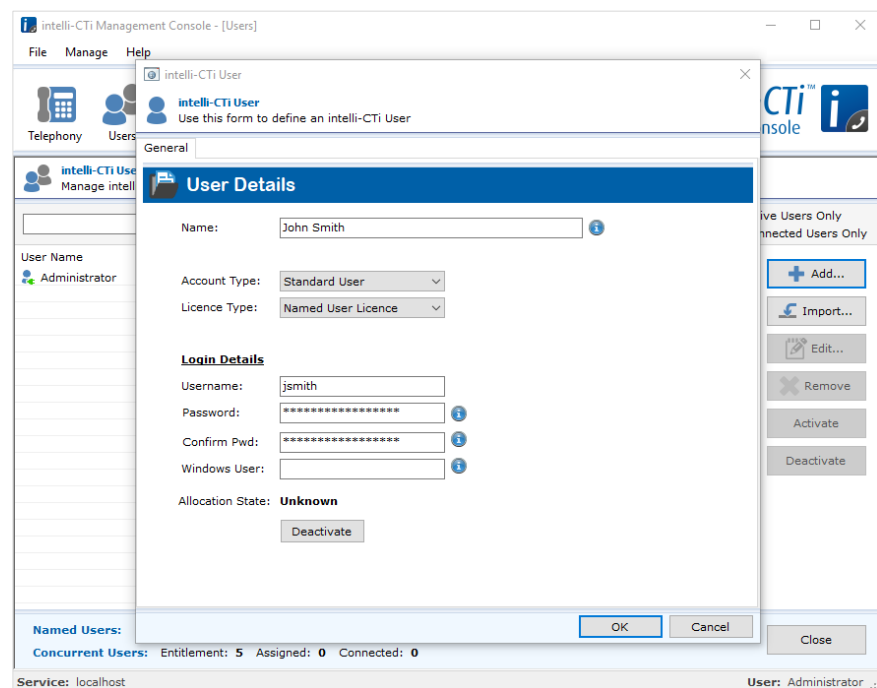
4. Now fill in the User's relevant details. For "Account Type"; most users should be set to "Standard User" (Only "Administrator Users can login to the intelli-CTi Service using the Management Console. If you choose to create another administrator, an email would be required for notification of changes and alerts on the intelli-CTi Service).

5. With regards to Licence Type; this setting will largely depend on your intelli-CTi Subscription. For either licence type; users will be allowed to connect to the intelli-CTi Service as long as the current usage does not exceed the licence count.

   a. **Named**: The license will be pending activation until the user first logs in to activate the license.

   b. **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.

6. 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 user's licenses, account type and activation status by selecting more than one user and clicking edit (you cannot edit a non-active user).*

Telephony Management

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.

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

System

Here you enter information about your telephone system environment

4. 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').

5. 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.

6. When it has finished downloading the list, click the **Extensions** button.

7. Review the list of extension numbers and press the **Close** button to finish the installation wizard.

8. To check that your intelli-CTi Service is now connected to your telephone system, follow the procedure in *intelli-CTi Telephony* Service *test* on page 33

Settings

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

2. This screen allows you to view the current port number being used for the Service.
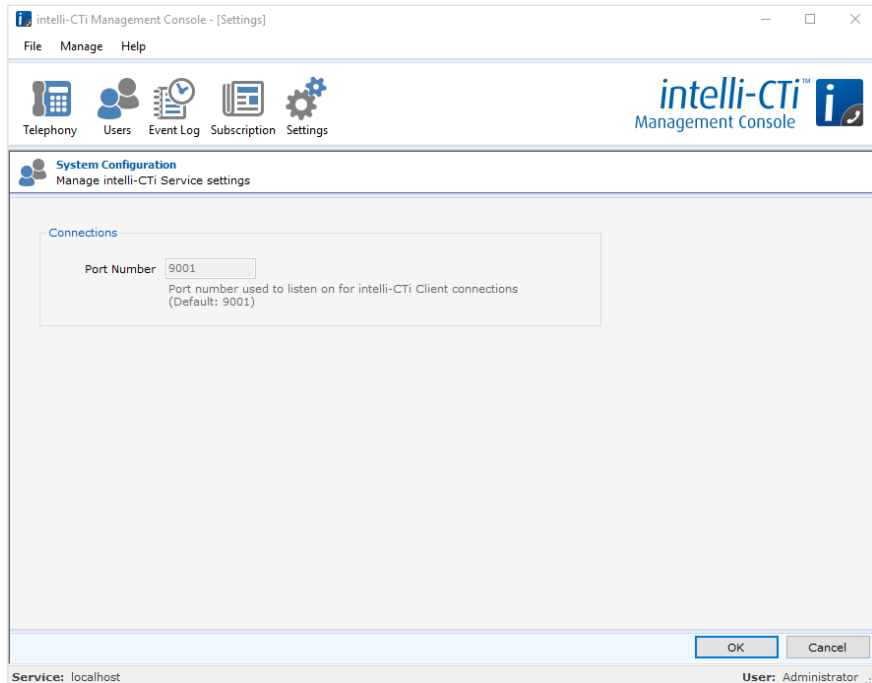
Installing the intelli-CTi Client Application (Including QGate Breeze)

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

Important Note: If you are upgrading from a previous version of intelli-CTi, please review the previous section *Upgrading from a Previous Version of intelli-CTi*.

QGate Breeze

QGate Breeze is an application container that provides applications with a set of pre-built user interface components. intelli-CTi depends on QGate Breeze to provide its user interface, so it will be automatically installed as part of the intelli-CTi installation.

When the installation is complete, it will have created a QGate Breeze icon on your desktop and a QGate Breeze folder in your Start menu. Use the icon or Start menu to run Breeze, which will start up intelli-CTi.

Installation Procedure

1. Run the **intelli-CTi Client Setup.exe** file from within the **Setup** directory of your intelli-CTi Installation Package.
   N.B. The name of the setup file might vary depending on whether the intelli-CTi Installation Package you have downloaded includes integration with a third-party system.
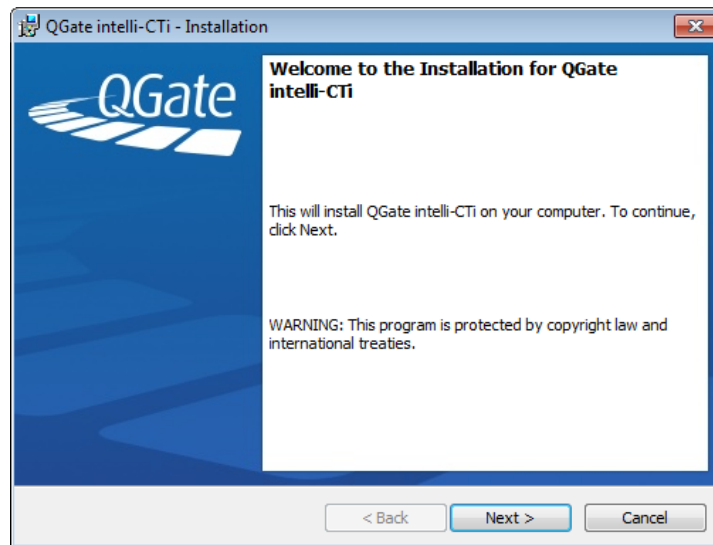
2. From the *Welcome* dialog, click on the **Next >** button. Note: at any time during the installation procedure, clicking the **Cancel** button will end the installation and roll-back any files installed to that point.
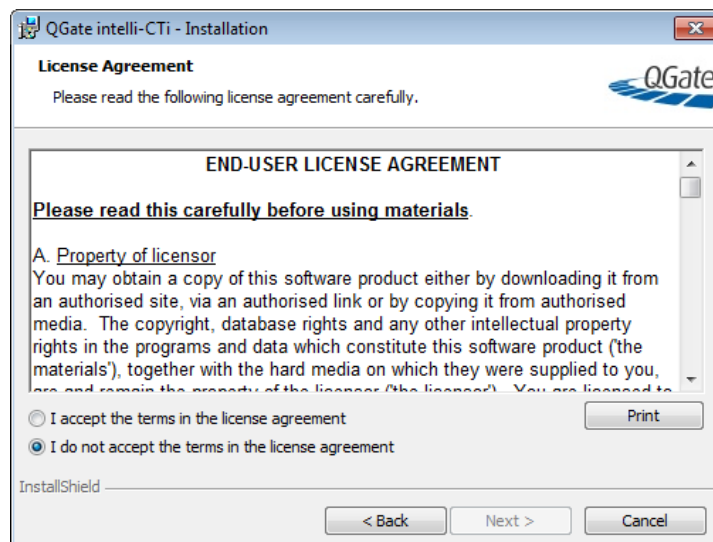

3. Read the license terms. If you do not accept the terms then cancel the installation now. If you do accept the terms then select the **I Accept…** radio button and click the **Next >** button.
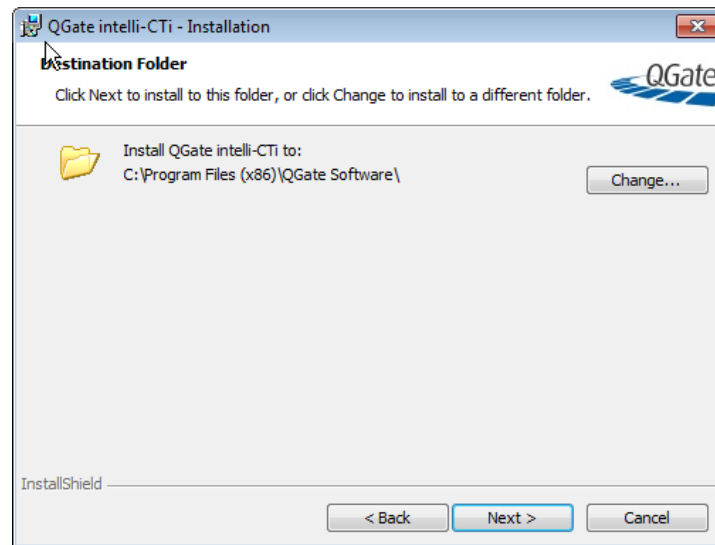
4. From the *Destination Folder* dialog, click on the **Next >** button to accept the default destination folder or click on the **Change…** button to locate an alternative path and folder.
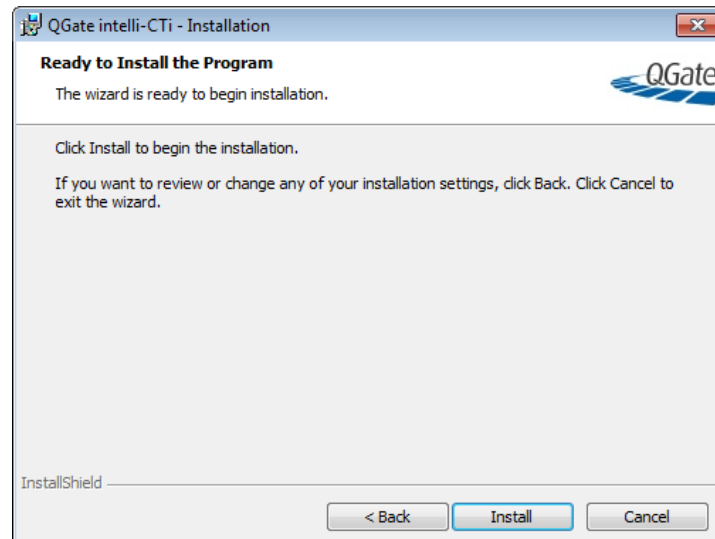
5. When you are ready to proceed, click the **Install** button.

6. After a few seconds, the installer will start to install QGate Breeze. intelli-CTi depends on QGate Breeze to provide its user interface. See QGate Breeze on page 17 for more information.

7. When the install has finished, the following window will be displayed. Click the **Finish** button to complete the installation.
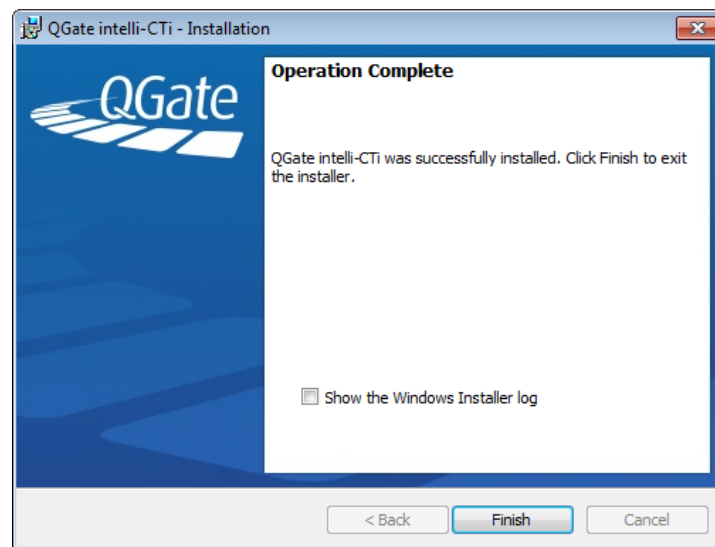
8. To start QGate Breeze/intelli-CTi, run the **QGate Breeze** item from your Start menu or from the icon on your desktop.

Installing Additional Components

Once you have installed the intelli-CTi application, complete with Virtual Telephony Server™ (VTS) and / or CTI Telephony Driver support, it may be necessary to install other components to enable integration with 3rd party applications.

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:
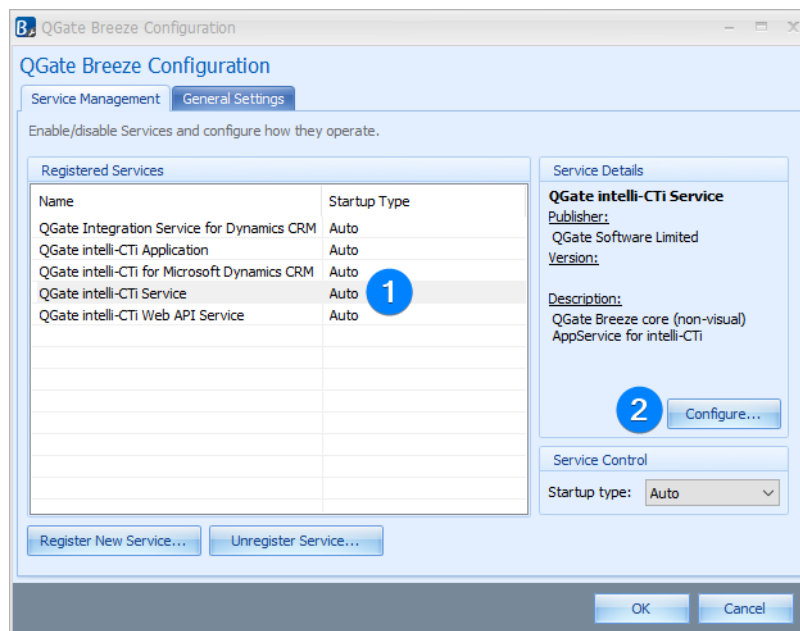
- Configuring intelli-CTi Connections
- Configuring intelli-CTi System Settings
- Configuring intelli-CTi and QGate Breeze User Settings

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.

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

- Network Service
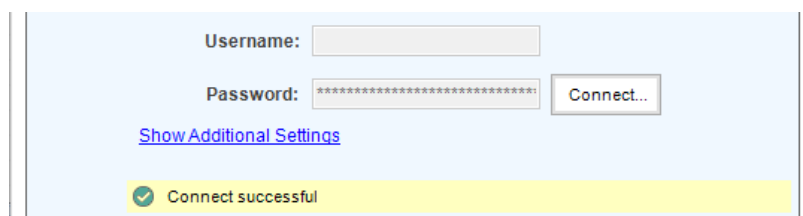- Cloud Service
- Virtual Telephony Service (Demo)

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.

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

1. 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 okay 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 a Cloud Service, which allows connecting to a hosted service running the intelli-CTi™ Service. To connect to a 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**.

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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.

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.
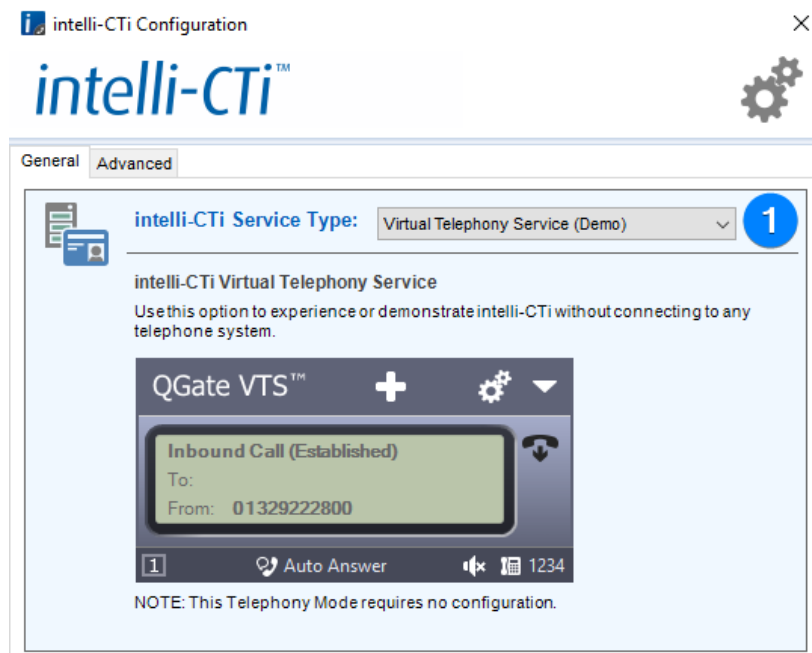
Telephony Connection Types

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 available:

- **intelli-CTi Telephony** Server**:**
  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.

- **Ring Central Client:**
  This connection type provides support for the Ring Central hosted phone system. This option requires the Ring Central "Phone" client to already be installed, configured and running before use.

- **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.

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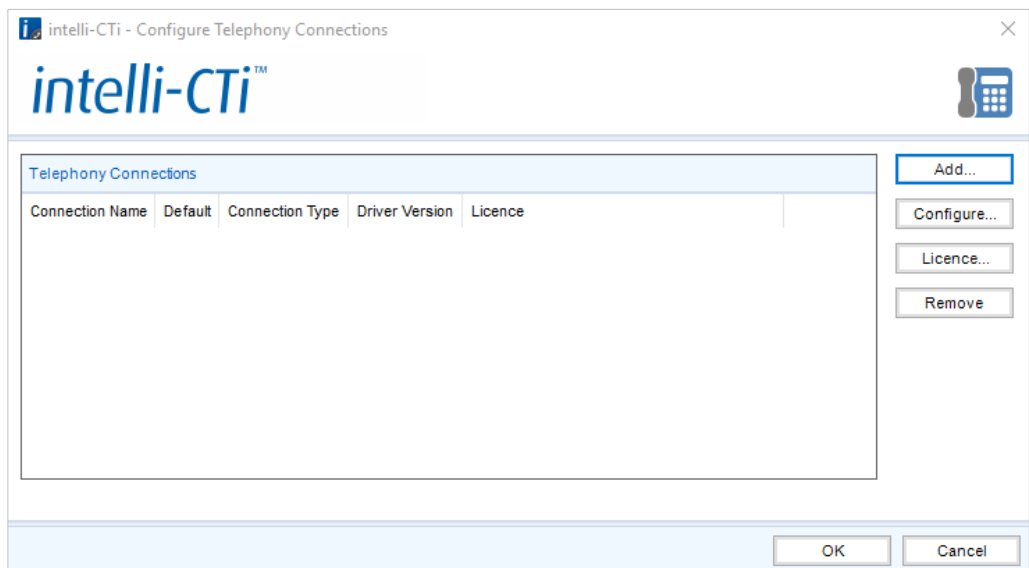
- **Other Connection Types:**
  Other connection types may also be available. Please contact QGate Software for more information.
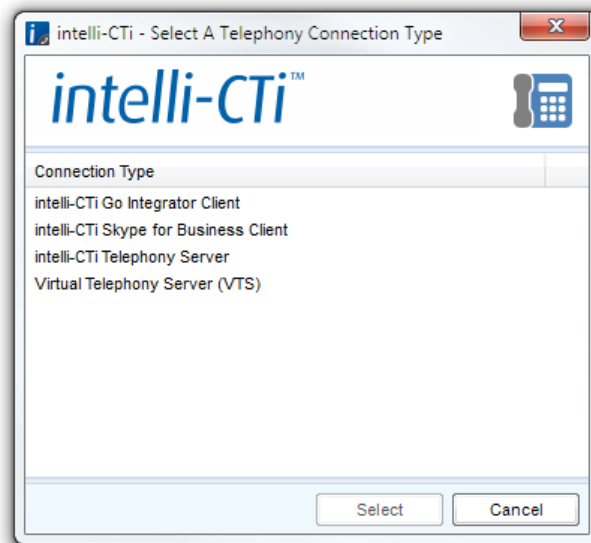
Configure Telephony Connections

Once you have connected successfully connected to a intelli-CTi service (or have a selected to use the VTS/Demo mode)
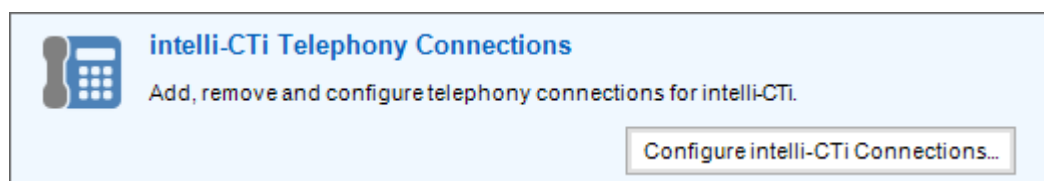
1. Click on the **Configure intelli-CTi Connections…** button to open the *Configure Telephony Connections* window.

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* on page 30 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.
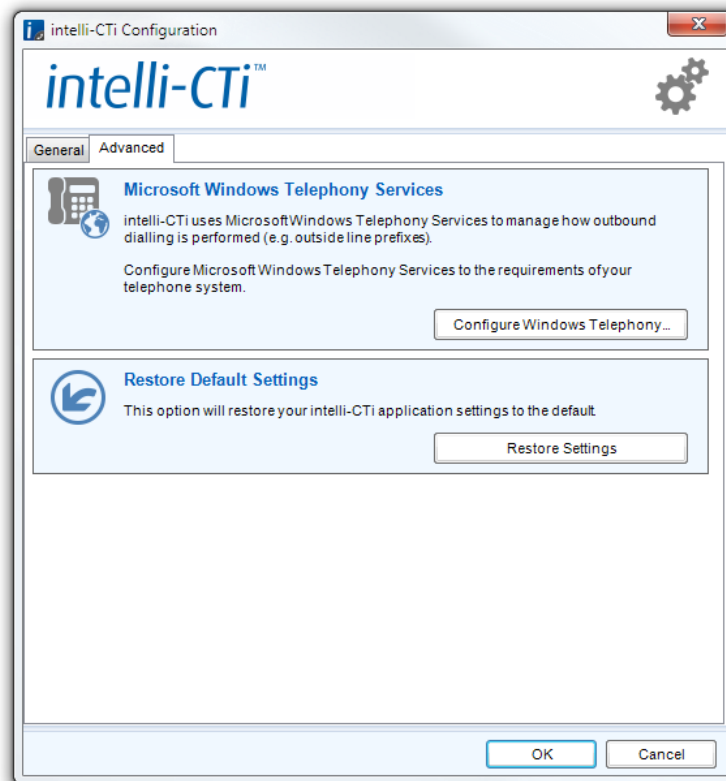
6. On the Advanced settings tab, you can **Configure Windows Telephony**. This section provides the ability access to the Microsoft Windows Telephony Services configuration (such as client-side dialing rules for advanced setups).

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.
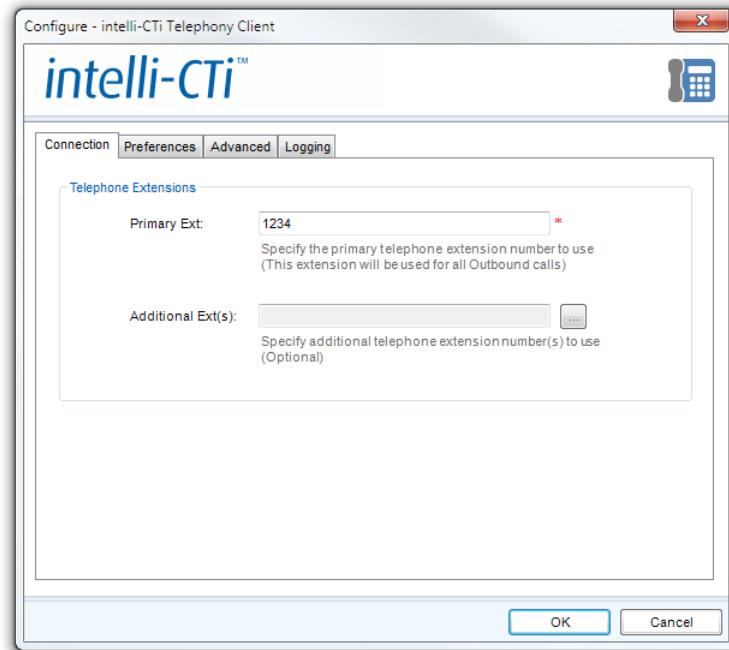
4. Enter or change the extension number that you wish to monitor.
    a. If required, you can also specify **Additional Extensions** to be monitored.
       Note: Primary extension will always be used for Outbound calls.
5. Click the **Close** button to close the Configure – intelli-CTi Telephony Client 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.

Configuring intelli-CTi and QGate Breeze User Settings

The user interface of intelli-CTi is provided by QGate Breeze. To configure QGate Breeze, proceed as follows:

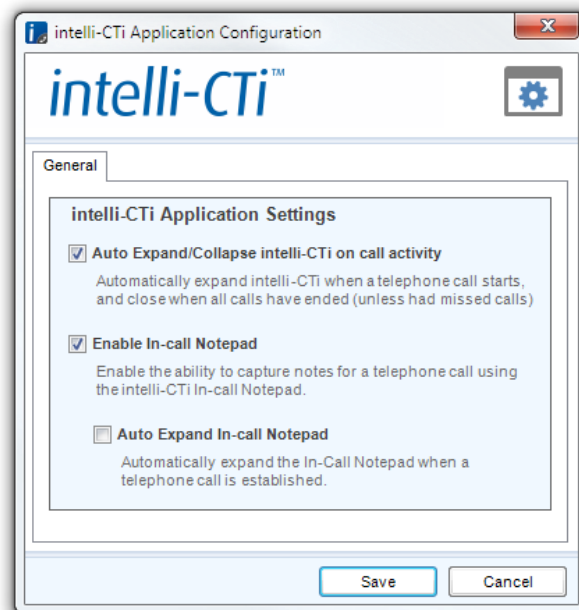1. Open up the Windows Control Panel.

2. Select the *QGate Breeze Settings* item, which will present the following window:
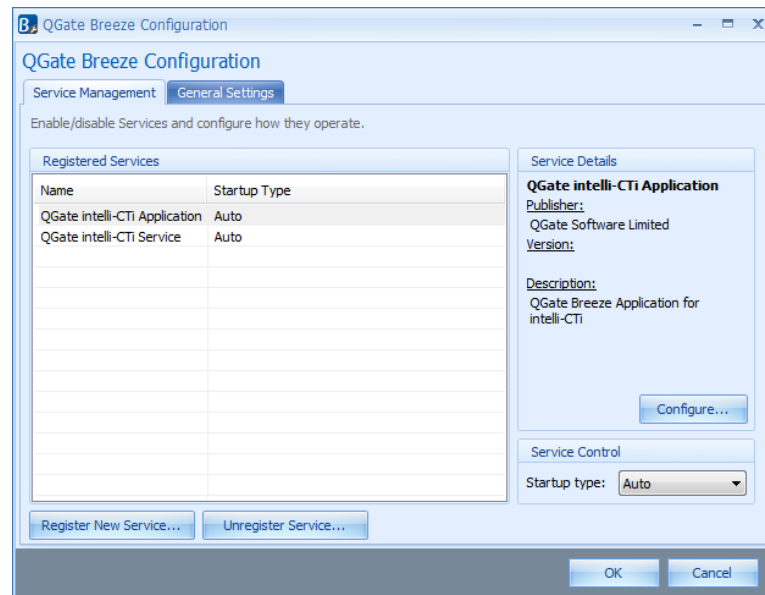
3. Select the **QGate intelli-CTI Application** service from the list.

4. Click the **Manage...** button, which will display the following window:

5. Select whether you would like the Breeze/intelli-CTi side-bar to expand automatically when there is some activity on your telephone line.

6. Click the Save button to save your changes and close the window.

7. If you select to Manage the QGate intelli-CTi Service, you will be taken to the same window as in **Error! Reference source not found.** on page **Error! Bookmark not defined.**.

8. Select the **General Settings** tab:
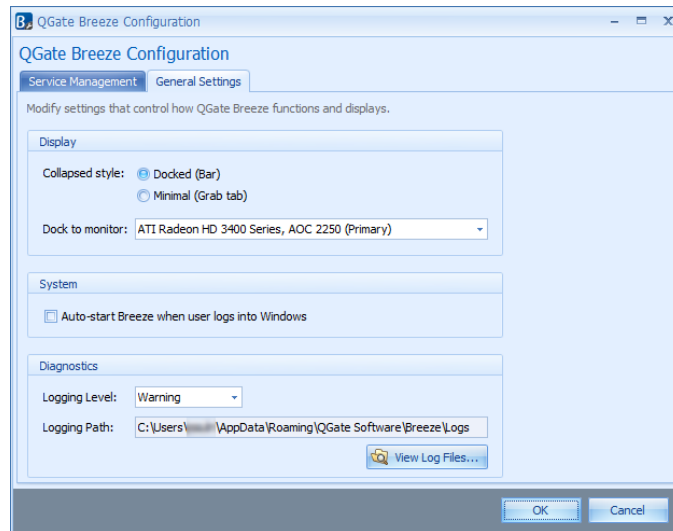
9. Select whether you want Breeze shown as a bar on the side of the screen:
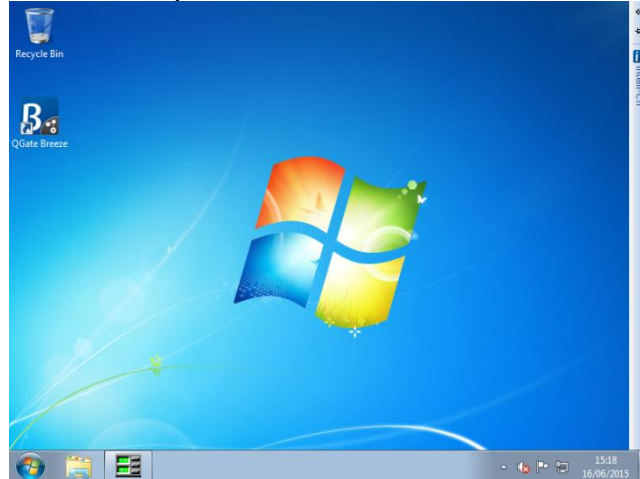
or as a tab on the side of the screen:
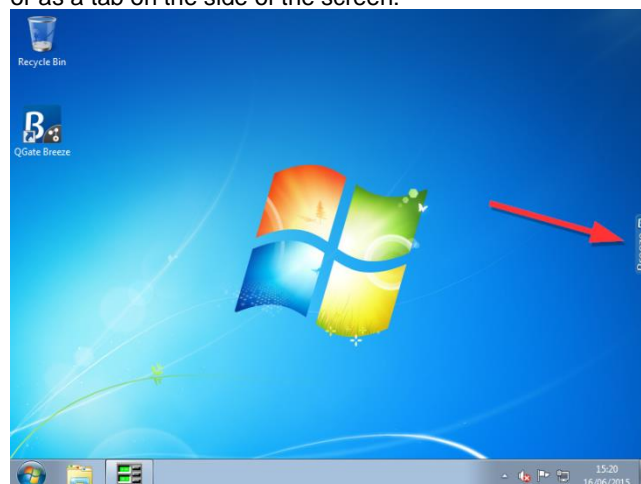
10. If you have more than one monitor, you can select which one Breeze will display on.

11. You can also enable Breeze to auto-start when the current user logs into Windows.

12. When you have finished, click the OK button.

intelli-CTi Installation and Configuration Guide

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.

Open up the intelli-CTi Admin Configuration application and click on the **Telephony** toolbar button.

Select the **Extensions** section.

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 initialisation was successful, continue to the next test.

Connection Test

Firstly, you must ensure the intelli-CTi application can successfully connect to your intelli-CTi Telephony Service.

Make sure that your extension number is shown in the intelli-CTi window. If your extension number is shown then this indicates that the intelli-CTi client has connected to the intelli-CTi Telephony Service successfully.
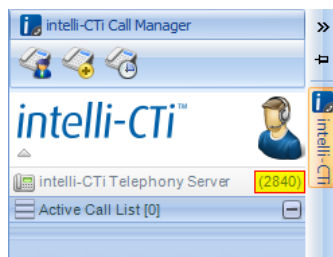
If the connection is reported as being successful, continue to the next test. If not, consult the troubleshooting section on page 36.

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 page 36.

intelli-CTi – Uninstalling

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:
   - **QGate intelli-CTi Service**
   - **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):
   - **QGate intelli-CTi**
   - **QGate Breeze**
5. Done

intelli-CTi – Technical Support

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

General Support

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

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/

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/

Product Information

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

www.intellicti.com/

Fault Reporting

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

Upgrades and Service Releases

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 licence.

Systems Integration

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

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