EVOLVE IP

Web Supervisor/Agent

System Requirements & Troubleshooting Guide

Evolve IP® Guide

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Full System Requirements:

In this section, we will describe the minimum hardware and software requirements to run The Evolve Office – Call Center: Supervisor Application and the procedure for starting the Supervisor Client Application.

- *Operating System Platforms: Microsoft Windows, Mac OS X, and/or Citrix Presentation Server*

Hardware Requirements:

1. Microsoft Windows or Mac OS X
   a. 1.4 GHz or higher Intel Core 2 duo processor or compatible CPU
   b. 2 GB of RAM recommended minimum; more memory generally improves performance
   c. 60 MB available hard disk space
   d. Video graphics card with minimum of 8 MB of RAM
   e. Super VGA monitor (15 inches or larger)
   f. 1024x768 minimum screen resolution
   g. HTTP(s) connectivity to the Evolve IP Platform
2. Citrix Presentation Server
   a. 2.0 GHz or higher Pentium 4 or compatible CPU
   b. Minimum 2 GB of RAM
   c. 60 MB free disk space per application installation
   d. HTTP(s) connectivity to the Evolve IP Platform
3. Citrix ICA Client Workstation
   a. 1.2 GHz or higher Pentium 3 or compatible CPU
   b. 128 MB of RAM
   c. Video graphics card with 8 MB of RAM minimum
   d. 1024x768 minimum screen resolution
   e. Network connection of minimum 56 KBps speed

Software Requirements:

1. Windows XP with SP3 (or higher), Windows Vista, Windows 7, Mac OS X, 10.5, 10.6 or Citric XenApp 4, 5
2. Sun Microsystems 32-bit Java 6 Update 19 or later, Runtime edition only
3. Outlook 2002/XP SP2, 2003, 2007, 2010 (only 32-bit edition) – Required for the Outlook contact directory
4. Microsoft Excel (optional)
5. Flash Player 9, 10.X Runtime (ActiveX Control) – Required if using CCRS-based reporting
6. Internet Explorer 7.0 or higher, Firefox 3.6, 10, 11, or 12, or Safari 5

Browser JavaScript Requirements:

In order to view reports, JavaScript must be enabled. Failure to allow Java applications to run within a web browser may impact or reduce the functionality of the call center application. Always allow the Java runtime and always select don't block for the call center application to work appropriately.

The following instructions are for Internet Explorer 7.0 and 8.0.:

1. Open Internet Explorer

2. Click on the Tools button

3. From the drop-down list, select Internet Options

4. Select the Security tab

5. Select the Internet Zone

6. Click the Custom Level button

7. In the Scripting category, select the Enable button for the Active Scripting subcategory

8. In the Scripting category, click the Enable button for the Allow status bar updates via script subcategory

9. Click the Yes button when prompted with a message box asking, Are you sure you want to change the settings for this zone?

10. Click the OK button in the Internet Options dialog Security tab

11. Close and restart Internet Explorer

Citrix Server Impacts:

1. The application can be published on a Citrix server via the Management Console for MetaFrame

2. Sun Microsystems Java 5 Update 11 or Java 6 Update 2 (or higher maintenance updates) Runtime editions

Citrix Workstation Impacts:

1. The Java Virtual Machine is not required on the workstation in this deployment

2. Remove any permissions for Everyone group. Click the Advanced button and check the box to propagate the permissions to all child objects.

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3. Add the Everyone group and give it "Read" permissions on the key. Click Advanced and propagate the permissions to all child objects.

Accessing the Web Client:

Getting Started:

For users who have the thick client desktop application for Supervisor, it is recommended to uninstall it before installing and using the web enabled Supervisor call center client application. Uninstalling the desktop application must be done by the local user of that machine.

1. To uninstall the client desktop application:

   a. Click on Start

   b. Go to Control Panel

   c. Click on Add or Remove Programs

   d. Select BroadWorks Call Center

   e. Click Remove

   f. Click on Yes at the dialog box that appears that you want to remove the program.

2. Once you've uninstalled the desktop application you can open an internet browser and enter the assigned URL for your web-enabled supervisor.

3. Enter your logon credentials and password

4. Check Stay Signed In to instruct the application to automatically reconnect and sign you in when it detects a network connection.

5. Click on the Sign In option

6. The application will start automatically

Supervisor Client Troubleshooting:

Unable To See Agents on Manage Screen:

1. Click on Edit under Agent Directory

2. Check to see if agents missing are selected in the agent directory (maximum of 50)

3. If agents are not on the list for agent directory, check with your system administrator if you have access to supervise those agents.

Unable To See Queues on Manage Screen:
1. Click on Queue Favorites Dialog

2. Check to see if queues missing are selected in the queue favorites dialog (maximum of 5)

3. If queues are not on the list, check with your system administrator if you have access to manage those queues.

How To Join or Unjoin a Queue:
1. Go to Setting options on the main manage screen

2. Select Applications tab

3. A check next to a queue indicates they are joined

4. No check indicates they are unjoined

Unable To run CCRS reports:
1. Open up your browser settings

2. Check security settings and make sure they are set to medium-low

3. If you're getting a spinning circle after you attempt to run a report, check your java and insure it is installed with the versions listed in System Requirements.

Unable To run Enhanced Reports:
1. Open up your browser settings

2. Check security settings and make sure they are set to medium-low

3. If you're getting a spinning circle after you attempt to run a report, check your java and insure it is installed with the versions listed in System Requirements.

Unable To See Agents on Manage Screen:
1. Click on Edit

2. Check to see if agents missing are selected in the agent directory (maximum of 50)

3. If agents are not in the list for agent directory, check with your system administrator if you have access to supervise those agents.

Unable To Silent Monitor:

1. If this is grayed out then you do not have permissions to silent monitor. If you require access to silent monitoring, contact your system administrator to request access.

Unable To Retrieve Calls From Queue:

1. Make sure they have the call highlighted that they want to retrieve from the manage screen

2. Then click on Retrieve

3. Call should direct to you call console

4. If you do not see the retrieve option for calls in the queues you're managing, check with your system administrator if you're set up as an agent and assigned to be able to retrieve calls.

Agent Client Troubleshooting:

Unable To See Supervisors In Contact Directory:

1. Click on Edit under Supervisor Directory

2. Check to see if supervisors missing are selected in the supervisor contact directory (maximum of 50)

3. If supervisors are not on the list supervisor contact directory, check with your system administrator if the agent is assigned to the supervisor to supervise.

How To Join or Unjoin a Queue:

1. Go to Setting options on the main manage screen

2. Select Applications tab

3. A check next to a queue indicates they are joined

4. No check indicates they are unjoined