CALLISTO

# CALLISTO OPERATOR CONSOLE

COC CONFIGURATOR MANUAL

Table Of Contents

**COC Configurator manual** ..... 3
- Login ..... 3
- Settings ..... 4
- Provider status ..... 7
- Users ..... 8
- Clients ..... 9
- Groups ..... 12
- Callisto lines ..... 13
- HtmlPanes ..... 14
- Assignments ..... 15
- Debugging ..... 17
- Copyright Information, Disclaimer ..... 18

# Login

Start the COC Configurator, and then fill in the initial information for the login. In the Address field, enter the IP address of the COC Proxy. In the Username field, enter admin as user name. In the Password field, enter the default password, which is admin. Then click on Connect to connect to the COC Proxy.

After your first login, it is strongly recommended to set a new, secure password. Double-click the user labeled admin from the client list and enter a new password in the Password field. Click the Save button to confirm the change. Additionally, you can create a custom admin user to use for administration activities.

# Settings

Settings can be modified in this dialog. Some of the settings cannot be modified and will appear disabled: Those settings need to be modified on Callisto through its web interface.

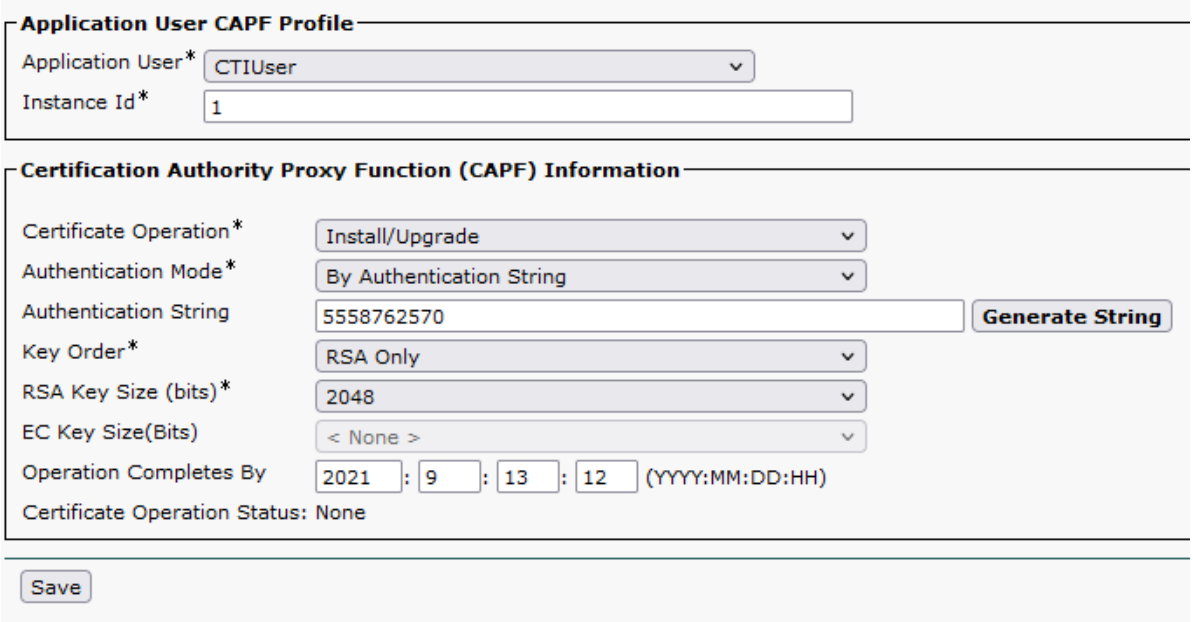
## Tab “UCM”

Click in the button labeled UCM to display the respective settings. Enter the IP address of the Call Manager in the IP Address field and enter the administrator user name and password below. Enter the credentials of the application user defined for the JTAPI (CTI) connection in the JTAPI User and JTAPI Password fields, or alternatively check on the option Use same credentials for JTAPI if the credentials are the same as above. See Call Manager configuration for more information on how to configure the application user on the Call Manager. Click on OK or Apply to save the settings.

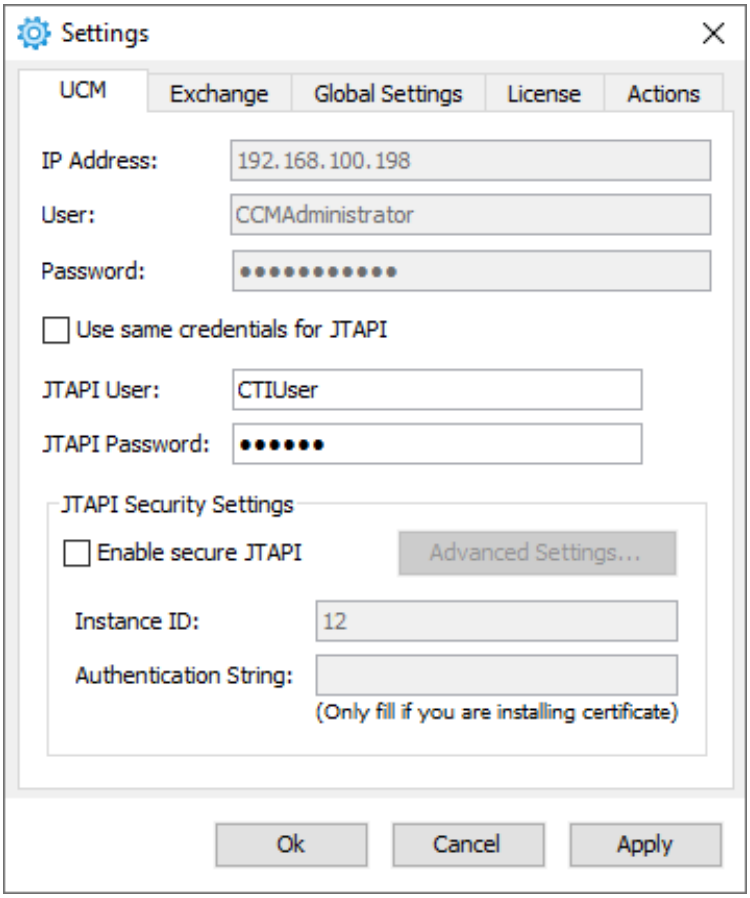
## Secure CTI Configuration

In order to establish a secure CTI connection with CUCM’s CTI Manager, follow these steps:

1. Add the CTI application user roles Standard CTI Allow Reception of SRTP Key Material and Standard CTI Secure Connection
2. Create an application user CAPF profile by choosing User Management > User Settings > Application User CAPF Profile.




    1. In the Application User drop-down menu, select the application user which will be used for the secure CTI connection.
    2. Enter the Instance Id.
    3. From the Certificate Operation drop-down menu, choose Install/Upgrade.
    4. Create an authentication string by clicking on the Generate String button. Leave all other options as default. Click Save.
3. Open the COC Configurator settings.




1. Check the Enable secure JTAPI option.
2. Enter the Instance ID and Authentication String previously configured on CUCM.
   An Authentication String is only required the first time you connect to secure CTI. After that, authentication is no longer needed and this value will be discarded.
3. Clicking on Advanced Settings, you can specify details of the Call Manager's TFTP and CAPF servers.
   This configuration is only necessary if you made changes to the locations/IP addresses or ports of the Call Manager's TFTP and CAPF servers. Otherwise, you can skip this configuration.
4. After clicking Apply or Ok, a secure CTI connection will be established.

## Tab "Exchange"

If you use Exchange, you can add the address and credentials for a connection to Exchange so that a user's Exchange status is displayed in the COC Client whenever an appointment becomes active (e.g. a meeting taking place). To configure the Exchange access, click on the Exchange tab, then fill in the following information: The URL or IP Address of the Exchange server in the Address field, the user credentials in the User and Password fields, and the synchronization interval in the Sync Interval field. The synchronization interval must be greater than zero.

## Tab "Global Settings"

| | |
|---|---|
| Max Integer Number Length | The maximum length of your internal numbers. This value can only be modified in the Callisto system parameters. |
| External Line Prefix | Set a prefix consisting of a single or multiple digits. This value can only be modified in the Callisto system parameters. |
| Voice Mail Number | If you have Voice Mail configured, set its number here. |

| | |
|---|---|
| Monitoring Tone Option | Choose who will hear the monitoring tone.<br>• None: No tone will be played on either agent or customer side (i.e. remote party). This is the default setting.<br>• Remote Side: Only the remote party will hear the monitoring tone during the call.<br>• Local Side: Only the agent will hear the monitoring tone.<br>• Both Sides: Both agent and customer will be able to hear the monitoring tone. |
| Recording Tone Option | Choose who will hear the recording tone.<br>• None: No tone will be played on either agent or customer side (i.e. remote party). This is the default setting.<br>• Remote Side: Only the remote party will hear the recording tone during the call.<br>• Local Side: Only the agent will hear the recording tone.<br>• Both Sides: Both agent and customer will be able to hear the recording tone. |
| Delete Call History after […] Days | Set the number of days after which call history will be deleted automatically. |
| Select CTIPort | Set the CTIPort which you want to use for the busy queue. If this setting is not configured, then the busy queue feature will be disabled. |
| Select CTIPort Number | Once you set the CTIPort, a drop-down menu with all the directory numbers of the selected CTIPort will appear. Select the number on which all calls will be connected. |
| Create Groups from department on User Import | See chapter Import users |
| Automatically create Callisto Line on Callisto Import | See chapter Import users |

## Tab “License”

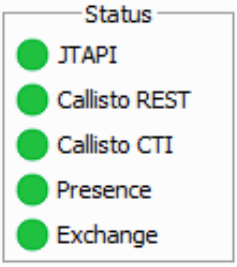
In the License tab, enter the license key provided by CTModule to activate the product. If you don’t have license key, you can request one by sending an email to CTModule. Make sure to include the Startcode in the mail. You can find this code in the License tab.

## Tab “Actions”

*Add New Action* icon

You can configure pre-defined actions (e.g. MS Dynamics pop-ups) to be executed on certain event (e.g. incoming calls). Click the Action tab and click on the Add New Action icon. Currently, only one action of the Type *MS Dynamics* is pre-defined. To use this action, configure the MS Dynamics server details (i.e. Enterprise URL, Database Name, Database IP, Database Username and Database Password). After creating the action, set what actions will trigger it by assigning it in the Client pane.

# Provider status




The status of the connection to the Call Manager, Callisto and Exchange is indicated at the bottom on the left side.

- Green indicates an established and working connection
- Red indicates that all required fields were filled out, but no connection could be established with the provided information. This suggests either that the information provided is incorrect or that there is a provider side problem. Hover over the label to see more details.
- Grey indicates that no or incomplete information was provided.

| Provider | Description |
|---|---|
| JTAPI | Connection via JTAPI to the UCM. Used to retrieve calls, terminals and lines. |
| Callisto REST | Connection via REST services to Callisto. Used to retrieve the users defined and imported on Callisto. Only used in Callisto environments. |
| Callisto CTI | Connection to Callisto, used to retrieve the CTI lines and calls observed by Callisto. |
| Presence | Connection with the Presence provider. |
| Exchange | Connection with an Exchange. Used to retrieve the availability status of the users in COC. |

# Users

Click on the Users button to list all the users defined on the COC Proxy. These users can be of type *UCM*, *Callisto* or *Proxy*, depending on the source of the user. Callisto lines and groups can be assigned to any user, but only users of type *Proxy* can be added, edited or removed on the COC Configurator.

Assigning a Callisto line to a user will have the line appear whenever the user is displayed. Additionally, lines assigned to operator users will be visible in the Operator pane.

Assigning a group to a user will have the user displayed when the group's tab is displayed in the COC client.

For more details, see Assignments.

## Import users

In a Callisto environment, you can import users, groups and mobile numbers from the Callisto UCM.

Click on the Settings button, and then click on the Global Settings tab. The following options are available:

| Option | Description |
|---|---|
| Automatically create Groups from departments on user import | If checked, groups will be automatically created based on the *Department* meta field of the imported users. |
| Automatically create Callisto Lines on Callisto import | If checked, Callisto lines will be automatically created based on the imported users' mobile numbers. This option is only available in environments with Callisto. |

*Import* icon

Click on the Users button and then click on the *Import* icon to import users. The users and related information will be imported according to your global settings.

# Clients

Click on the Clients button to list all the clients defined on the COC Proxy. The clients can be the owner of a group or assigned to a group. A client assigned to a group can see the all users in this group. If the client is set as owner of the group, he can additionally edit and remove this group as well as managing what users are assigned to it. On the COC Client, groups are represented as a pane containing the users assigned to this group (this pane view is the same for both group owners and group assignees).

For more details, see Assignments.

## Authentication types

There are two ways to authenticate clients: Proxy and Callisto authentication. The authentication type can be set individually for each client, but every client can only have one type of authentication. You can choose a client's authentication type from the drop-down menu next to the Password field.

### Proxy authentication

The Proxy authentication is the base authentication of a client on the COC Proxy. The authentication credentials are stored on the COC Proxy and a password must be provided for the respective client.

### Callisto authentication

If the Callisto authentication is selected, the password field is disabled and will not be taken into account when the client is created. With this method, the client's user name and the password (entered when logging into COC) are used as credentials to authenticate through Callisto.

## Add a single client

*Add New Client* icon

Click on the Clients button to open the pane where you can manage the credentials, role and permissions for each COC Client. Furthermore, you can change the password for the admin client here. Click on the *Add New Client* icon to add a new client. Enter the client's Username and Password in the respective fields.

To assign roles to the client, click on the corresponding checkboxes next in the Roles section.

| Role | Description |
|---|---|
| Administrator | An administrator client can log into the COC Configurator and change settings. |
| User | A user client can only log into the COC Client. |

To assign permissions to the client, click on the corresponding checkboxes next in the Permissions section.

| Permission | Description |
|---|---|
| Permit forwarding of users | The client can forward the lines of any user. |

| Permission | Description |
|---|---|
| | Without this permission, the client can only forward the operator lines. |
| Permit status modification of users | The client can modify the presence status any user.<br><br>Without this permission, the client can only change his own presence status. |
| Permit parking | The client can park calls and retrieve parked calls. |
| Show all busy queue calls | The client can see all busy queue calls which were initiated by other users in his Busy Queue pane.<br><br>Without this permission, the client can only see the calls which were put on busy queue by himself. |

### Masked digits

This option determines how many tailing digits of the remote party's number will be obscured by replacing them with an "X" character on display. If you want to mask the whole number, select All.

If you enable this option, the operator can only see the masked numbers without name of the other agents who are on the call.

### Fallback options

You can configure the behavior when a transferred call is not being answered.

| Option | Description |
|---|---|
| No Fallback | If you transfer a call and the transferred call is not answered, then there will be no fallback. |
| On Initiator Number | The transferred call will be redirected to the initiator number after being unanswered for the specified timeout. The timeout value must be smaller than the call timeout on the call manager. |
| On Custom Number | The transferred call will be redirected to a custom number after being unanswered for the specified timeout. The timeout value must be smaller than the call timeout on the call manager. |

## Add multiple clients

*Create Clients* icon

To create multiple clients at once based on users imported from UCM or Callisto, first select one or multiple users in the Users section. These will be the base for the clients about to be created. With the users selected, click on the *Create Clients* icon. A dialog with the credentials and permissions for the clients will appear. The values set on this dialog will be the same for all clients, but can be changed individually by editing each respective client. If proxy authentication is selected as authentication type, the client is able to change his password in the COC Client. Only clinets of the role user can be created this way.

In the same dialog, it is also possible to assign clients to groups in bulk. To do so, select all the groups in the table next to Groups Assigned. The user names of the clients will be the same as the user IDs of the selected users.

Click Ok to start the creation of the clients. If a client with the same name already exist, a prompt will give

you the option to overwrite the existing clients with the selected properties.

If the properties and assigned groups are overwritten, only the password and permissions will be overwritten; the previously assigned groups will not be unassigned.

# Groups

Click on the Groups button to list all the groups that have been defined. Here, you can add, remove and edit groups. Only the groups that were created on the COC Configurator can be managed, but not the groups that were automatically created by user imports. Once the groups have been set up, you can assign them to clients, which then will be visible in the corresponding client. You can also assign users to groups through the COC Client in the group’s tab.

A client can have a maximum of 50 groups assigned.

For more details, see Assignments.

# Callisto lines

*Callisto Lines* icon

*Add New Callisto Line* icon

In an environment with Callisto or if the Callisto credentials are provided, you can add additional Callisto lines to be surveyed (e.g. a mobile number or a fax number). Click on the button Callisto lines, the currently available Callisto lines will be listed. Click on the Add New Callisto Line icon and fill in the following information:

- Line: the phone or fax number that should be surveyed.
- Name: a descriptive name for the line.

Click on Ok to save the newly added Callisto line. Once a Callisto line has been added, you can assign users to it, which then will be visible on the COC Client of the respective users.

For more details, see Assignments.

# HtmlPanes

*HtmlPane* icon

*Add New HtmlPane* icon

COC is capable of opening web pages inside the application. To configure this function, click the HtmlPane button and click Add New HtmlPane. Provide a name for the pane and the URL of the web page to load inside the pane.

The URL field supports string interpolation for the following two literals:

- **%user%**: Will be replaced with the name of the currently logged in user.
- **%pwd%**: Will be replaced with the currently logged in user's password.

You set the following URL in the HtmlPane configuration:

```
https://www.example.com?userid=%user%&password=%pwd%
```

A COC Client agent logged in with the user name FredBloggs and the password yrghZag2AGy6Nlf will access the following URL when opening the pane :

```
https://www.example.com?userid=FredBloggs&password=yrghZag2AGy6Nlf
```

When using string interpolation, you will be transmitting user credentials in plain text to the configured URL. Make sure to use this feature only with trusted URLs.

After creating the HtmlPane, assign it to the client in the Client pane.

# Assignments

On the bottom of each section, there is a pane labeled Assignments containing a tab for every available assignment. The following assignments exist:

| Section | Assignment |
| --- | --- |
| Client | • Owned Groups: Groups owned by the selected client.<br>• Assigned Groups: Groups assigned to the selected client.<br>• Monitored Groups: Selected Client can monitor the users, which are part of these groups.<br>• Assigned Event-Action: Event-Action mapping assigned to the selected client.<br>• Assigned Client-HtmlPane: HtmlPane assigned to selected client. |
| Users | • Callisto Lines: Callisto lines assigned to the selected user.<br>• Assigned Groups: Groups assigned to the selected user. |
| Groups | • Assigned Users: Users assigned to the selected group.<br>• Assigned Clients: Clients assigned to the selected group. |
| Callisto lines | • Assigned Users: Users assigned to the selected Callisto line |
| Terminals | • Terminal Lines: Lines associated with the selected terminal |

*Assign* icon

*Unassign* icon

To assign entities to each other, click on the *assign* icon of the respective tab. A dialog with a table listing all the assignable entities will appear. Select one or more entities and click Ok to assign these entities.

To unassign entities from each other, select the entities in the respective tab and click on the *unassign* icon. A confirmation message is shown before performing the unassignment.

Both assignments and unassignments are performed as background task with the progress of this task visible in the bottom-right corner of the COC Configurator. You can continue to use the COC Configurator while those tasks are being performed.

## Terminal–user association

This section explains which terminal will be assigned to a user.

A device assigned to a user in Callisto will be assigned as a user's terminal in COC if it is "available", in the sense of the device being up and running. If there is no device assigned to the user in Callisto, or if the assigned device is not available, then COC will look for a device that matches one of the two following criteria:

- The device is defined in CUCM as being owned by the user.
- The user has logged into the device with extension mobility.

Additionally, the following criteria must be met:

- The device is not occupied by another user to whom it is assigned in Callisto.

The first found device that matches those criteria will be assigned as the user's terminal.

If no device meeting those criteria is found, the user's COC won't show any device available to control.

# Debugging

To simplify the process of debugging the COC Proxy in particular situations, you can click the Debug button. A popup will appear with the options Logs, Terminals and Calls.

## Logs

The Logs section allows you to retrieve the logs that COC Proxy is generating. This this function only encompasses live logs of the proxy: Previously generated logs are not available.

There are three different logging levels:

- Severe: Will report exceptions and unexpected errors occuring on the Proxy.
- Warning: Will report situations that may need some attention by the administrator.
- Info: Will report information about activity on the COC Proxy. This level can provide information about calls and other live actions.

*Save* icon

To enable logging, select the option Enable Logging and set the desired logging level. The default logging level is Severe. To save the current logging information, click on the *save* icon and select the destination file. To check a specific part of the logs, uncheck the checkbox Auto scroll to bottom so that the new log entries will not trigger a scroll in the log window.

## Terminals

This section provides a general overview of all the terminals and lines present on your system. In the column Lines, you see a list of all the lines of the terminal. For more details about these lines, select the respective terminal and click the Terminal Lines tab.

Only the terminals and lines that are in service are listed. Also, each association between Callisto lines and users is represented as a terminal.

## Calls

This section lists details on all calls currently taking place in your network. Note that the states represented in this view may not have the same description as the ones in the COC Client.

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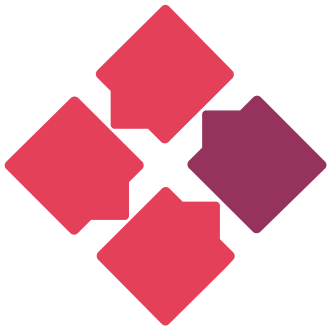

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