CALLISTO

CALLISTO OPERATOR CONSOLE

SETUP MANUAL

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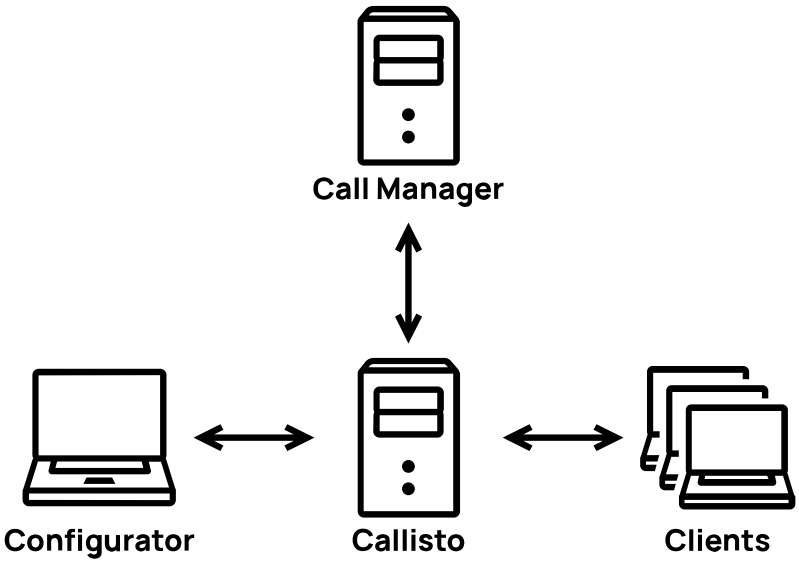
System overview



COC Proxy UCM is part of Callisto. It is the software needed for communicating with the Call Manager, the COC Client and the COC Configurator.

The COC Configurator has to be installed on the administrator’s PC and the COC Client on the PCs of each end user.

Installation

Installing COC Configurator

The COC Configurator allows administrators to configure COC Proxy and the roles and permissions for the COC Client.

System requirements

Operating system	Windows 2008/10 Server, Windows 7 or higher
RAM	2 GB or more
CPU	dual core or more
Cisco Call Manager	version 7 or higher

To install the COC Configurator on a client PC, run COC_Configurator_Setup.exe and follow the installation wizard through the installation.

COC Client

System requirements

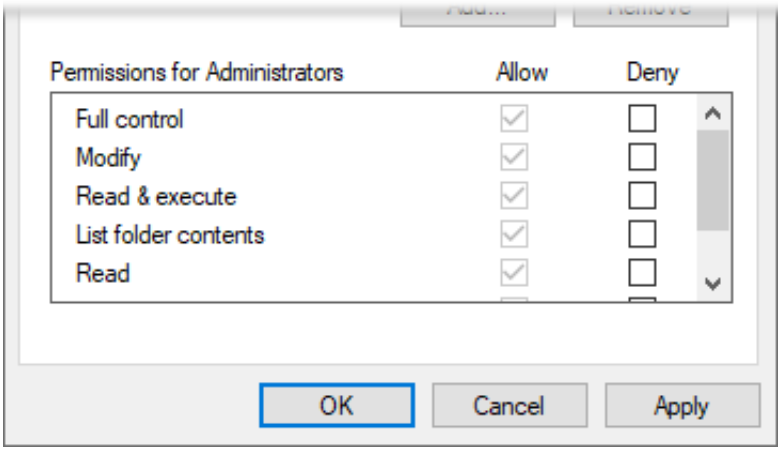
Operating system	Windows 10 or higher
RAM	2 GB or more
CPU	dual core or more

To install the COC Client (i.e. the Operator Console itself) on a client PC, run COC_Client_Setup.exe and follow the installation wizard through the installation.

The COC Client setup requires an internet connection to download and install one of the required components. In case there is no internet connectivity on the PC, you need to download the WebView2 runtime standalone installer (available from the CTModule website) after installing COC.

Once this file is downloaded, unzip it and open WebView2InstallerX64.exe to start the installation. If COC is already installed on the PC, make sure COC has been shut down completely before installing WebView2.

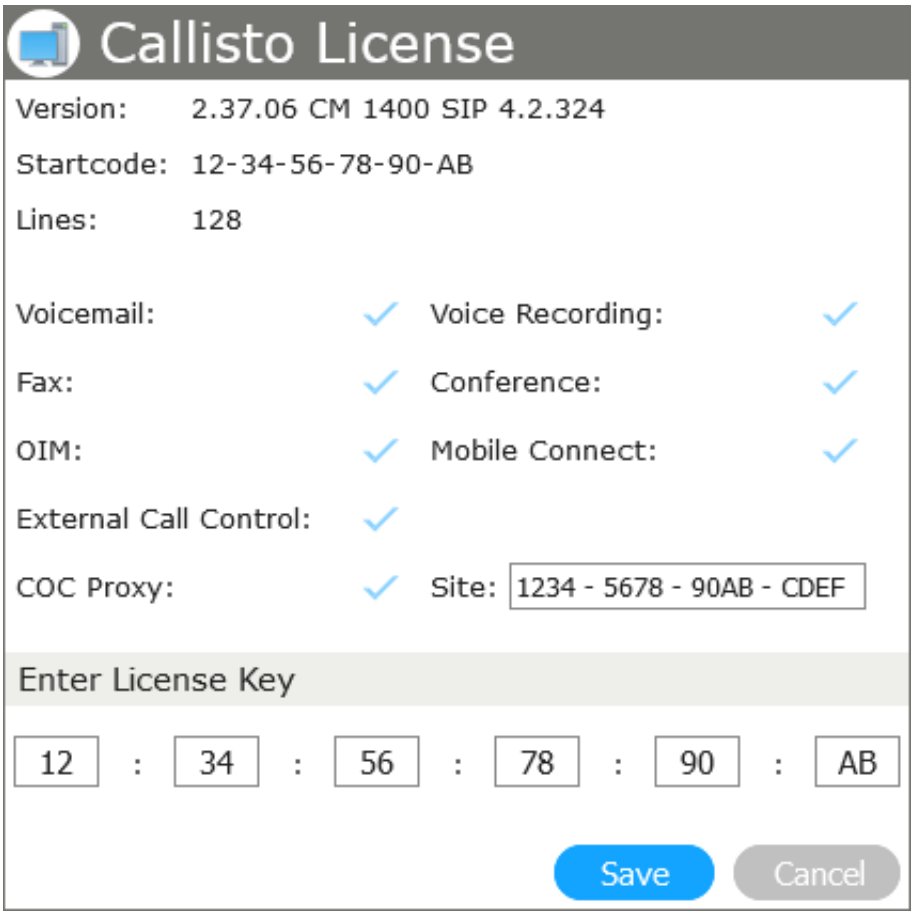
Once the WebView2 installation is finished, locate the directory <*user directory*>\Documents\CTModule\COC\ and check the permissions for the folder EBWebView by right-clicking it and choosing Properties > Security > Edit…. The currently logged-in user needs full permissions on this folder.



Once all permissions are granted, start the COC Client. It uses the Microsoft Edge WebView2 framework to display the HTML-based content.

Product license

The software will be licensed through Callisto. Inside Callisto, choose System > Callisto License and verify that COC Proxy is enabled with the license entered in the Site field.



Call Manager configuration

The COC Proxy UCM communicates with the Call Manager through AXL and JTAPI (CTI). For the communication with JTAPI (CTI), an application user must be created on the Call Manager.

User group

Before configuring the Call Manager to work with COC, a user group must be created. This user group should include all the roles required when operating with COC. In the Call Manager, choose User Management > User Group, then click on Add New to add a new user group. Enter a name for the user group and click Save. Display the overview of user groups by choosing User Management > User Group, then select the name of the user group you just created. Certain roles must be assigned to this user group. Click on the *information* icon under Roles to assign roles to the user group.

The following roles must be assigned:

Role	Description
Standard AXL API Access	This role only needs to be added if the credentials for the assigned application user and the administrator are the same, needed to allow access to the AXL database API.
Standard CTI Allow Call Park Monitoring	This role is needed for the parking feature of COC. It should be added even if the parking feature is not used.
Standard CTI Allow Control of Phones supporting Connected Xfer and conf	Allows control of all CTI devices that support connected transfer and conferencing
Standard CTI Enabled	Enables CTI application control
Standard CTI Allow Call Recording	Enables Call Recording
Standard CTI Allow Call Monitoring	Enables Call Monitoring

Application user

In the Call Manager, choose User Management > Application User. Then click on Add New to add a new application user, or click on the user name of an existing application user to edit it. When adding a new application user, enter and confirm a user password. Under Permissions, add the user group created above to this application user. Under Device Information, in the list box Available Devices, select all the devices that should be controlled by COC, then click on the *down arrow* button to move those devices to the Controlled Devices list box.

Parking

To configure the parking functionality to work on COC, at least one *Call Park* number should be available. To create one, click on Call Routing, then click on Add New. On the Call Park Number Configuration dialogue, configure the respective parking numbers so that the calls can be parked on this parking slot. For details on configuring this page, please check the Cisco documentation about Call Park.

Busy queue

To configure the Busy Queue functionality in order to work correctly on COC, at least one *CTIPort* device with directory number should be available. To create one, choose Phones and click on Add New. In the Phone Type menu, select CTIPort. After creating the phone, add a DN to it. In the Line configuration, locate

the fields Maximum Number of Calls and Busy Trigger; Set 200 calls for both.

Call recording

Call recording functionality is available with CUCM version 9 and later.

To use call recording, the *Standard CTI Allow Call Recording* role needs to be added to the application user group (see above).

To add an application user to this group, choose User Management > Application User, click on the Find button and then click on your application user. In the Permissions Information section, click the Add to Access Control Group button. A new window will pop up. Click on the Find button and check the checkbox next to Standard CTI Allow Call Recording. Click on the Add Selected button on the bottom of the page.

Afterwards, call recording is enabled for your application user. The option Built-in Bridge must be enabled on the agent's phone.

Silent monitoring and coaching

In order to enable the call monitoring feature, some configurations are needed on the CUCM.

1. The *Standard CTI Allow Call Monitoring* group must be added to the application user. Choose User Management > Application User, click on the Find button and then click on your application user. In the Permissions Information section, click the Add to Access Control Group button. A new window will pop up. Click on the Find button and check the checkbox next to Standard CTI Allow Call Monitoring. Click on the Add Selected button at the bottom of the page.
2. After adding this group, the Built-in Bridge option needs to be enabled. It should be enabled on both the supervisor's and the agent's phone.
3. Check the CSS/partition setting on the phones/lines. All phones involved in the monitoring and coaching feature should be reachable among each other.
4. Assign the desired CSS in the Monitoring Calling Search Space on the supervisor's phone line.

After these steps, the call Monitoring feature will be enabled for your application user.

Presence (CUPS)

Presence with REST

To enable REST API based presence in COC, follow these steps:

1. Specific roles need to be assigned to the application user. Choose User Management > Application User and select the application user which is used for Callisto. In the Permissions Information section, click the Add to Access Control Group button. A new window will pop up. Click on the Find button and check the checkbox next to Admin-3rd Party API.
2. The *End user* for presence needs to be enabled. Choose User Management > End User and choose any end user. In the Service Setting section, check the Enable User for Unified CM IM and Presence option. Repeat this for every user that is supposed to use presence.
3. If your CUPS is integrated with Exchange, enable Include meeting information in presence too.
4. The following ports should be opened:
    a. 8843 – incoming
    b. 8082 – incoming and outgoing
    c. 8083 – incoming and outgoing
5. If COC Proxy was running during the configuration above, restart COC Proxy.

Presence with SIP

In order to use the SIP SIMPLE presence integration interface, you need to add the Callisto IP to the

incoming ACL on CUPS:

1. Go to the CUPS administration page
2. Navigate to System > Security > Incoming ACL
3. Click on Add New
4. In the Address Pattern filed, enter the Callisto IP address

In order to enable end users for presence, follow steps 2 and 3 from the REST section. On the Callisto machine, make sure that port number 27865 is open.

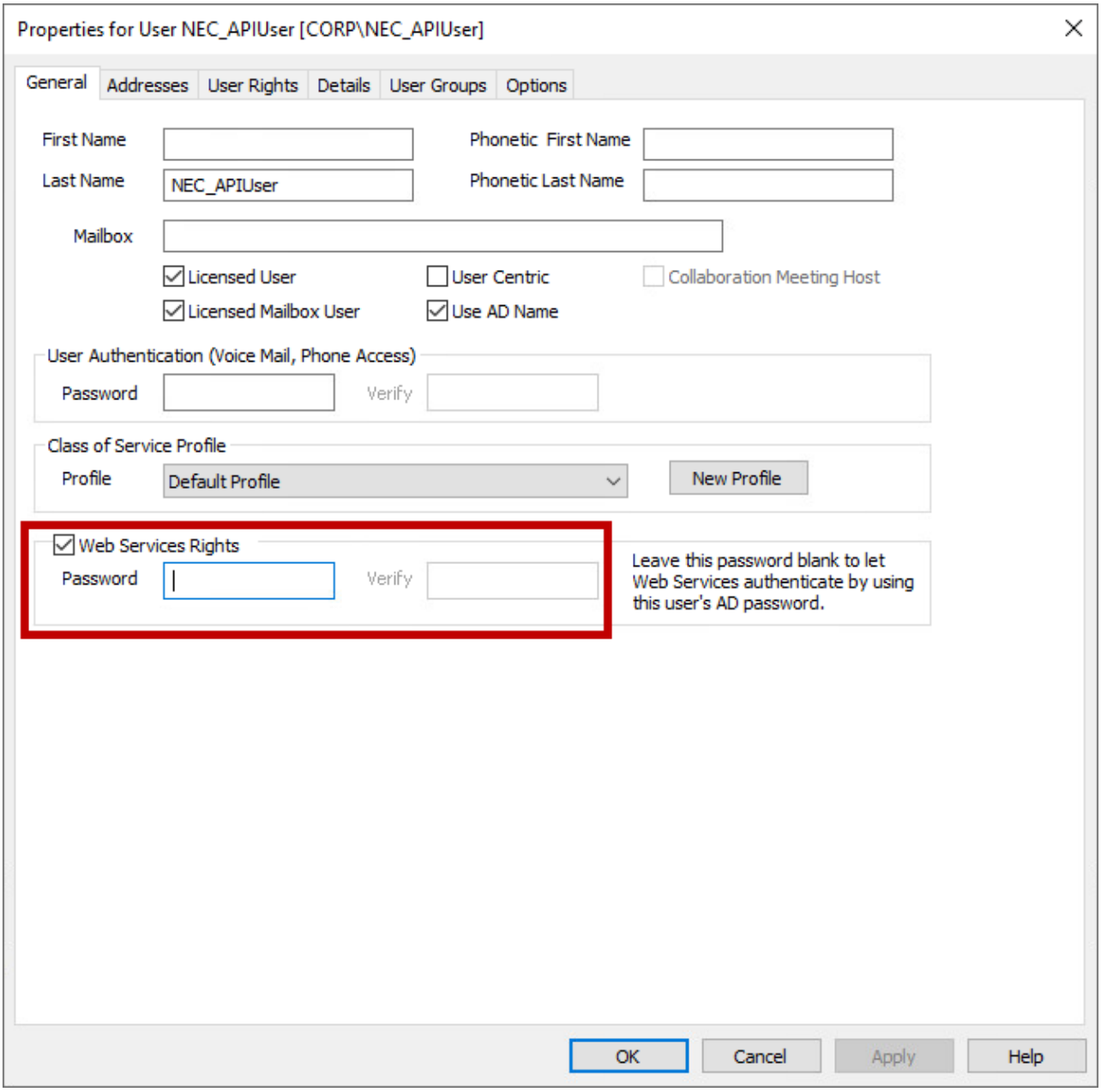
NEC 3C configuration

The COC Proxy facilitates communication with the NEC 3C system through its SOAP API.

Application user

To establish the communication channel, it’s necessary to create an application user on the NEC 3C server.

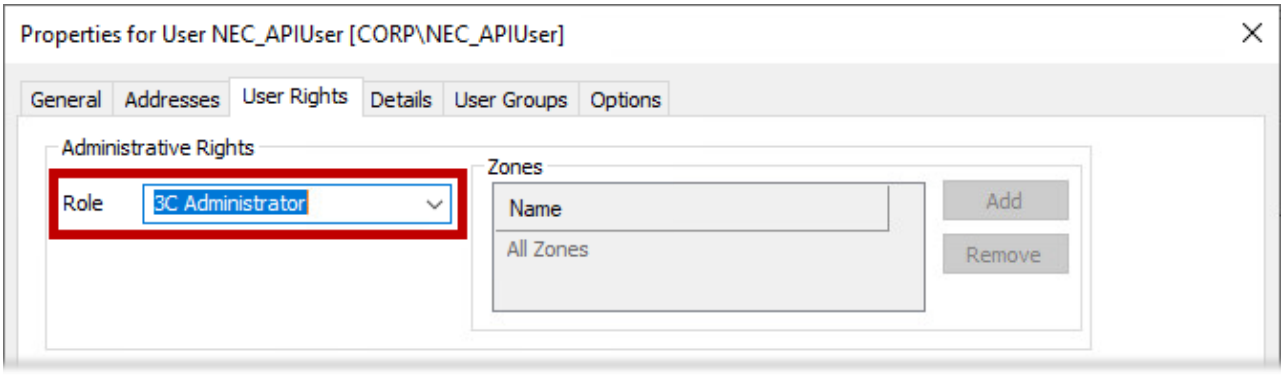
1. Access the 3C Administrator interface.
2. Navigate to the Users tab.
3. Look for an option to create a new user, labeled Add User.
4. Fill in the required details for the new user, such as username, password, and any other necessary information.
5. After creating the user, navigate to the General tab.
6. Ensure that the Web Services Rights option is checked.
7. Save the changes.



Your newly created application user can now be used in the NEC 3C system.

The following steps will show you how to grand administrator privileges to an application user.

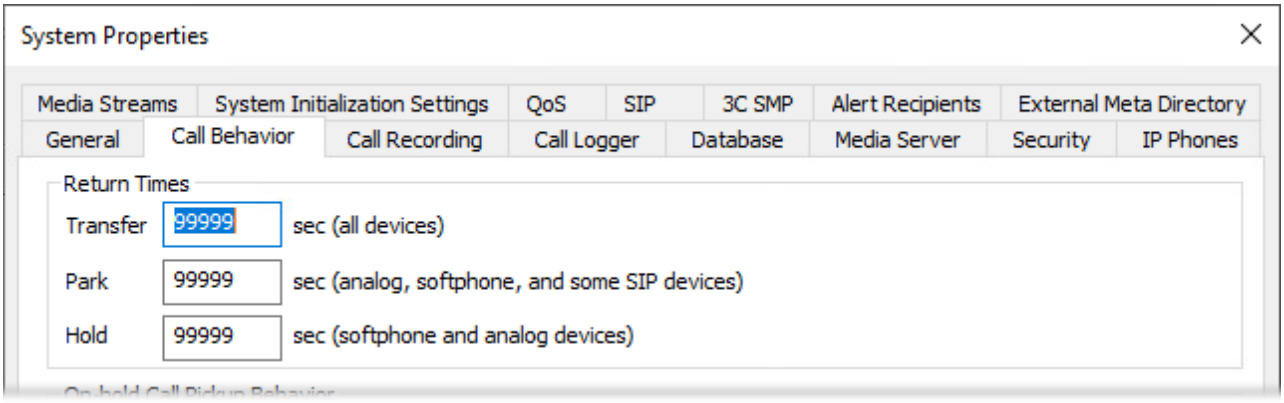
1. Navigate to the User Rights tab.
2. In the User Rights section, locate the Administrative Rights section.
3. From the Role drop-down menu, select 3C Administrator to assign administrator privileges to the user.
4. Save the changes.



Call behavior return times

Return times are handled on the side of Callisto, so it's recommended to set the return times to the maximum value on the side of 3C for optimized operation.

1. Access the 3C Administrator interface.
2. Navigate to the General tab.
3. Open the System properties.
4. Navigate to the Call Behavior tab.
5. In the Return Times section, set the timeout settings to the maximum allowed value.



Exchange configuration

COC allows the integration with Exchange to synchronize the presence states of the users with their Exchange availability. In order to do so, COC needs to connect to a specific Exchange user with the rights to observe the other users' calendars. The following steps lead you through . First, you'll have to create a new user (in this example named COC_Calendar) in Active Directory and create a mailbox in Exchange.

You also have to configure the rights on Exchange to configure what information can be seen by other users. You can set the same rights for all the users through the following shell command:

```
$users=Get-Mailbox -resultsize Unlimited
ForEach ($user in $users) {Add-MailboxFolderPermission -Identity
$user":\Calendar" -user COC_Calendar -AccessRights LimitedDetails}
```

You can also set the rights for each user individually through the following shell command:

```
Add-MailboxFolderPermission -Identity exchange-
user:\Calendar -User COC_Calendar -AccessRights LimitedDetails
```

:\Calendar is the location and name of the calendar folder. The name of the calendar folder is language dependent, so it might be different in the language your Exchange installation is set in. COC_Calendar is the name of the user that was added. exchange-user is the name of the user whose access rights you want to set.

In case the Exchange is reporting an error despite settings being set correctly, it is suggested to try accessing the WSDL file of the Exchange Web Service via your web browser. To do so, enter the following URL: https://<*Exchange IP*>/ews/Exchange.asmx, where <*Exchange IP*> is the Exchange address configured on the COC Configurator. Use the same credentials configured on the COC Configurator to access to this file. The COC Proxy should be able to access to this file in order to connect with Exchange.

Proxy licenses

COC proxy works on user-based licensing, meaning one device will be associated with one user. For example, if you have 10 user licenses then you can incorporate 10 devices as well as 10 Callisto CTI lines. If you add more devices or CTI lines than available licenses, a warning message reading “License exceeded” will appear in the COC Configurator. To remove the warning message, remove any devices or CTI lines that exceed the number of licenses.

If you change the amount of devices, a restart of the proxy is required to make the new status active. If this is not possible, you can alternatively remove all devices from the device list and then assign the correct number of devices again.

If you need to use more devices or lines that your current amount of licenses allows, you can purchase additional license keys from CTModule.

CALLISTO OPERATOR CONSOLE

COC CONFIGURATOR MANUAL

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.

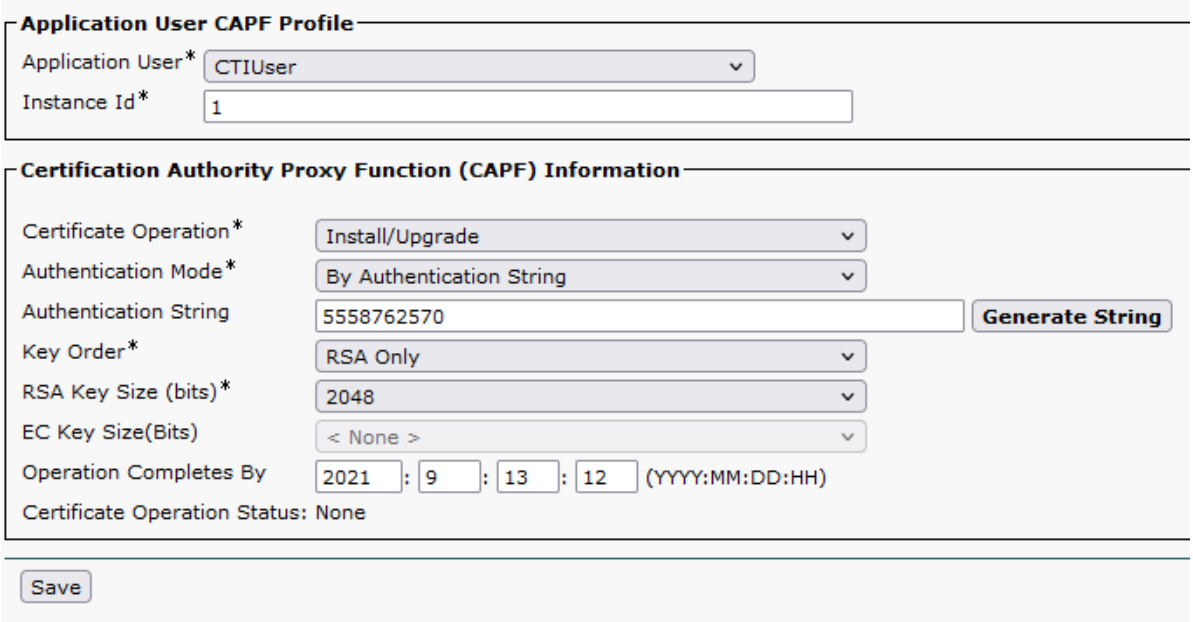
Tab “UCM”

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.

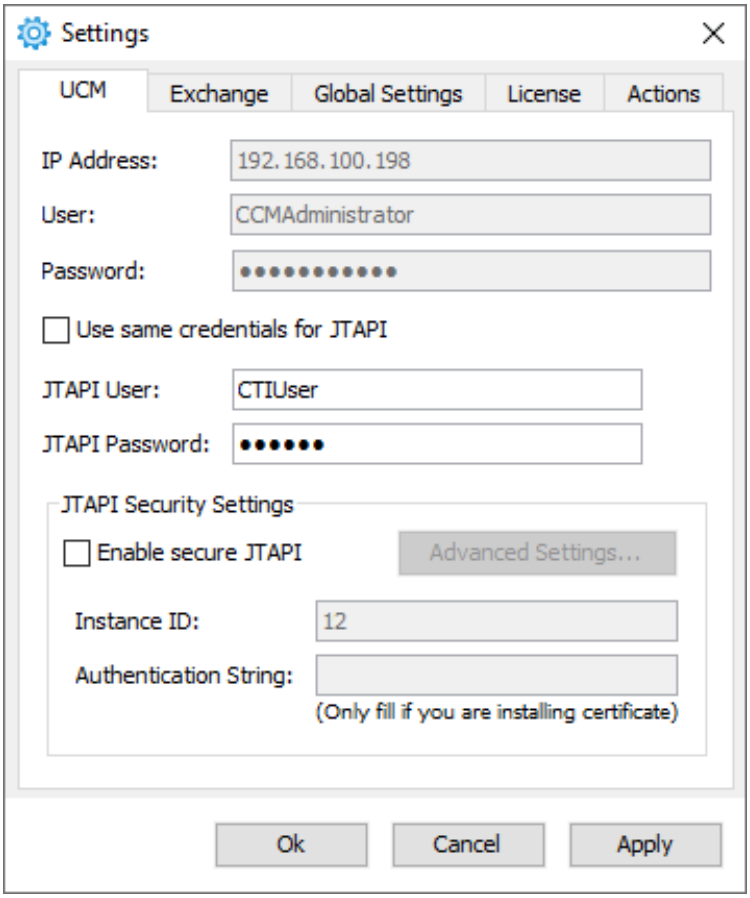
Secure CTI Configuration

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. • None: No tone will be played on either agent or customer side (i.e. remote party). This is the default setting. • Remote Side: Only the remote party will hear the monitoring tone during the call. • Local Side: Only the agent will hear the monitoring tone. • Both Sides: Both agent and customer will be able to hear the monitoring tone.
Recording Tone Option	Choose who will hear the recording tone. • None: No tone will be played on either agent or customer side (i.e. remote party). This is the default setting. • Remote Side: Only the remote party will hear the recording tone during the call. • Local Side: Only the agent will hear the recording tone. • 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”

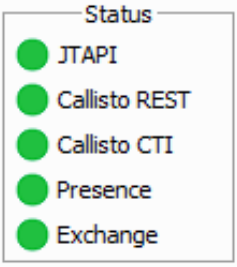
In the License tab, enter the license key provided by CTModule to activate the product. If you don’t have license key, you can request one by sending an email to CTModule. Make sure to include the Startcode in the mail. You can find this code in the License tab.

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. 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. 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. • Assigned Groups: Groups assigned to the selected client. • Monitored Groups: Selected Client can monitor the users, which are part of these groups. • Assigned Event-Action: Event-Action mapping assigned to the selected client. • Assigned Client-HtmlPane: HtmlPane assigned to selected client.
Users	• Callisto Lines: Callisto lines assigned to the selected user. • Assigned Groups: Groups assigned to the selected user.
Groups	• Assigned Users: Users assigned to the selected group. • 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.

CALLISTO OPERATOR CONSOLE

COC CLIENT MANUAL

System overview

For the system to function, CUCM needs to be set up and running. Terminals also need to be defined on the CUCM. Those terminals need to be assigned to a CUCM application user in order to be usable by Callisto.

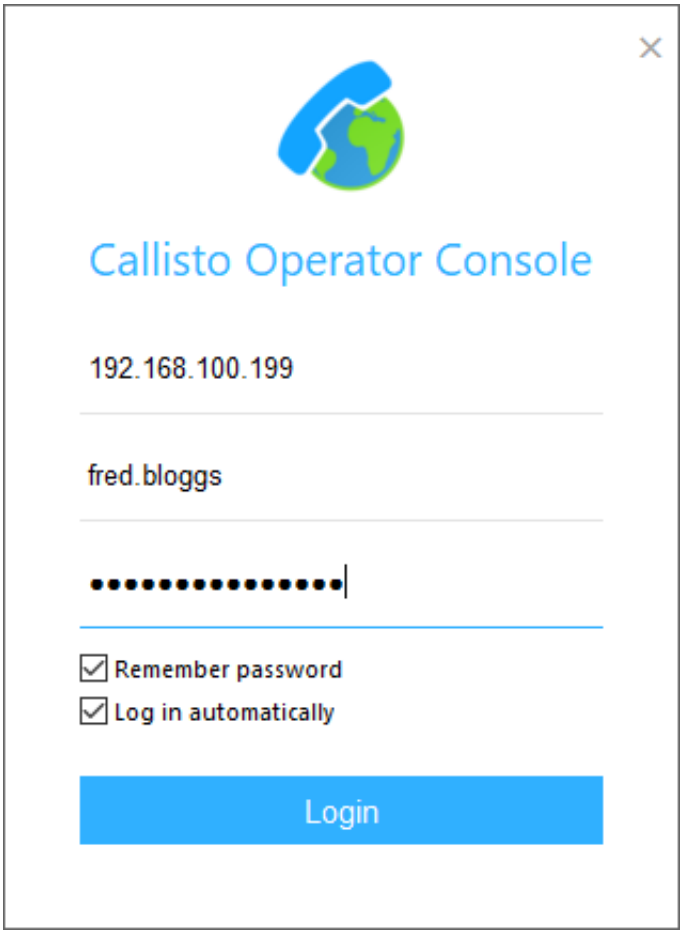
End users can be defined on CUCM and imported to Callisto afterwards, or they can be defined on Callisto directly. After importing the phones from CUCM to Callisto, terminals can be assigned to users. At this point, users need to be imported into the COC system. This can be done either manually or automatically at a defined interval (see COC Configurator manual – Users).

Based on the imported users, clients need to be created for all the users that need to be able to controll the phones (i.e. agents). These clients are necessary for the operators to connect to COC. Client creation is described in the COC Configurator manual – Clients. Every client needs to be assigned to a user, otherwise no device (line) will be assigned to the client. Without a device (line), an operator will not be able to place or receive calls, and the COC Client cannot be used.

COC Client overview

COC Client is a software which operators use to control telephone calls. In order to be able to connect to COC Client, a *client* entity needs to be defined in the COC Configurator (see COC Configurator manual – Clients).

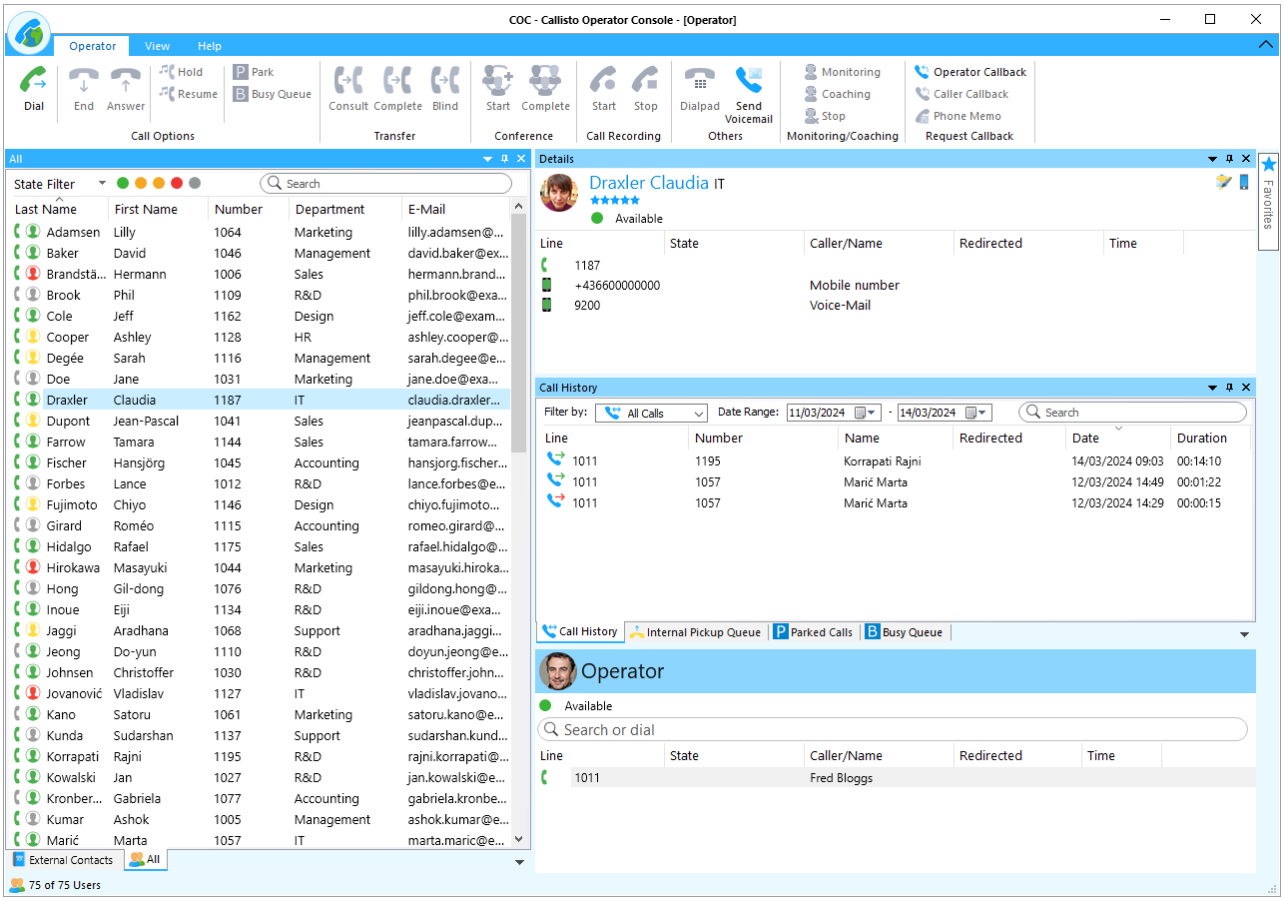
Upon launching the COC Client, the user is presented with the login dialog. In this dialog, operators need to enter the Callisto IP address and their user credentials.



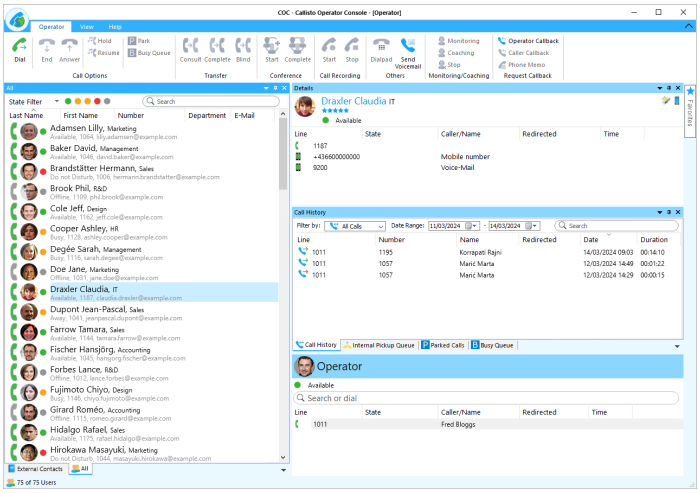
After filling in the required fields, the COC Client is started and the main view is displayed.

The main view consists of four panes:

- The Users pane (left): Contains tabs for all user lists, outlook contacts, directories, and groups you have access to.
- The Details pane (top right)
- The Calls pane (middle right): Contains the *Call History*, *Internal Pickup Queue*, *Parked Calls* and *Busy Queue* tabs
- The Operator pane (bottom right).



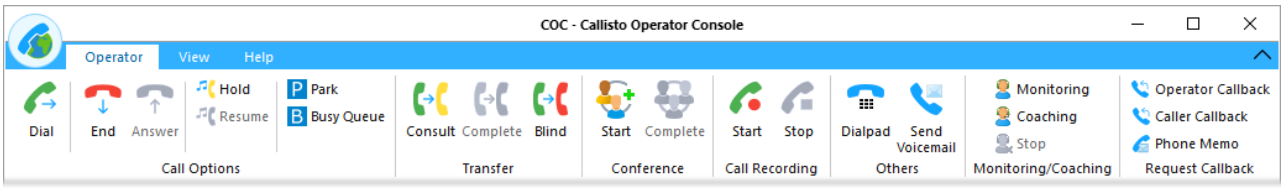
COC main window (*Users* pane in *Detailed* view)



COC main window (*Users* pane in *Photo-List* view)

Sections in main view

Call controls (ribbon bar)



The ribbon at the top of the main window is the main area of the COC Client. This is where all the most important call-related operations are performed.

All options related to IP telephony are available here and will be described in detail in the following chapters.

Pane “Users”

This section provides details about all the users and groups the client has access to. At the bottom strip of this section, you find all the groups that are assigned to this client (see COC Configurator – Groups) and additionally, a tab for the contacts available via Microsoft Outlook. Outlook contacts are fetched from the local Microsoft Outlook application. Switching to a group-related tab will show the users that are assigned to the respective group.

Users in the list can be sorted by any of the values for which columns exist (last name, first name, number, department, email address). Clicking on a column label will sort the contacts by this value in ascending order, clicking the same column again will sort the contacts in descending order.

The search field in the top right corner of the section can be used to search for users by any of the values provided. The search algorithm uses partial word matching, providing greater flexibility.

Every entry in the list features a handset icon on the very left. This icon the status of the device which the user controls. There are four statuses:

The device status is not directly set by the user, but is determined by the user's usage of the terminal.

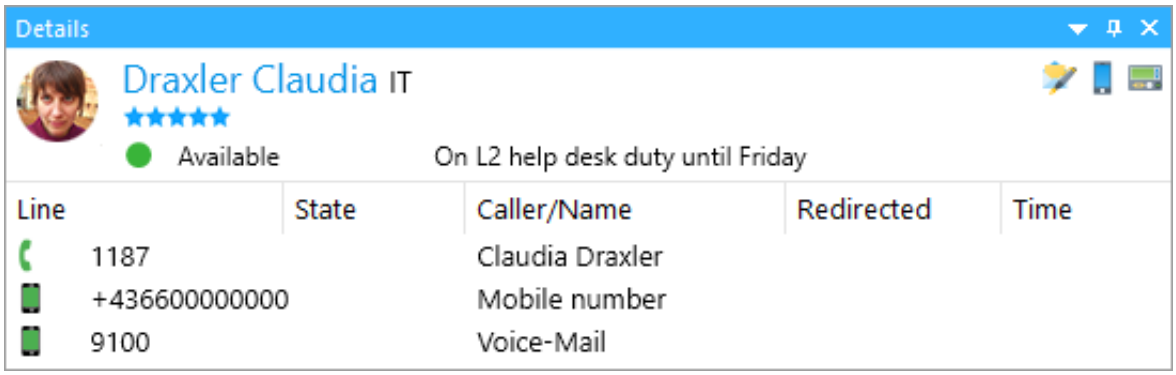
In addition, the handset icon may feature a blue arrow next to it, indicating that the device is set to forward incoming calls. If you call such a device, your call will be forwarded to the number set by the device owner, regardless of the device status.

A second status can be set manually. This user status is represented as a colored user icon in *Detailed* view, or as a colored circle to the right of the user's picture in *Photo-List* view.

This status can be set by the users themselves, or by any user who has permission to change user statuses (see COC Configurator – Clients).

Pane "Details"

If a user is selected from the *Users* pane, the user's details are displayed.



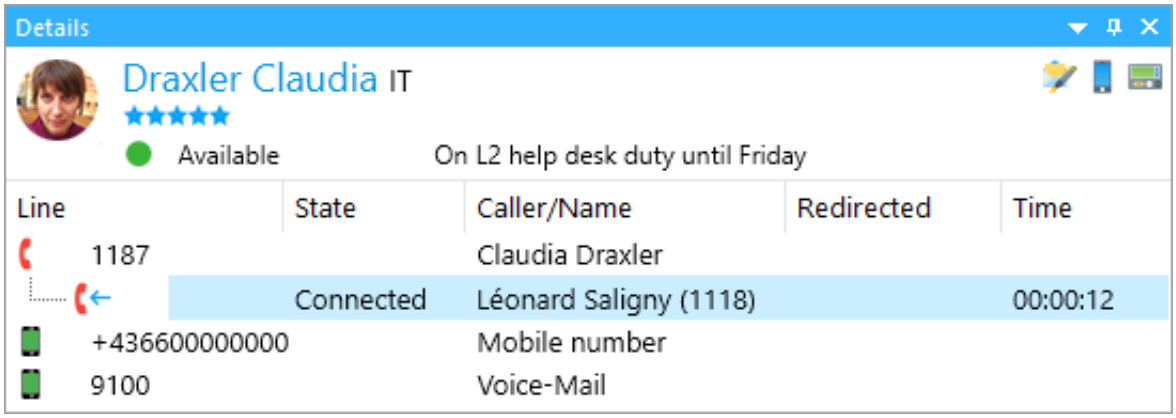
The top left corner shows the profile picture, name, and department of the user. Below the name is the VIP status, followed by the presence status and the personal status message. Operator users may have the privilege to change the presence state and personal status message of other users. This privilege can be enabled or disabled in the COC Configurator (see COC Configuration – Clients).

On the right side are buttons dedicated to the email, mobile phone and pager of the selected user, if the respective means of communication are available. Clicking on the email icon allows for a direct email conversation with the user, and clicking on the pager or mobile phone symbol will directly access the

respective numbers in the number box.

The lower half of this pane contains information about lines which are assigned to the user. In the screenshot above, the four-digit number at the top of the list is a CUCM line originating from the terminal assigned to the user. The number below is a Callisto line (see COC Configuratior – Callisto lines). The names of the Callisto lines are configured in CUCM.

If a line is making or receiving a call, the columns State, Caller/Name, and Time show values regarding the call and the connected line.

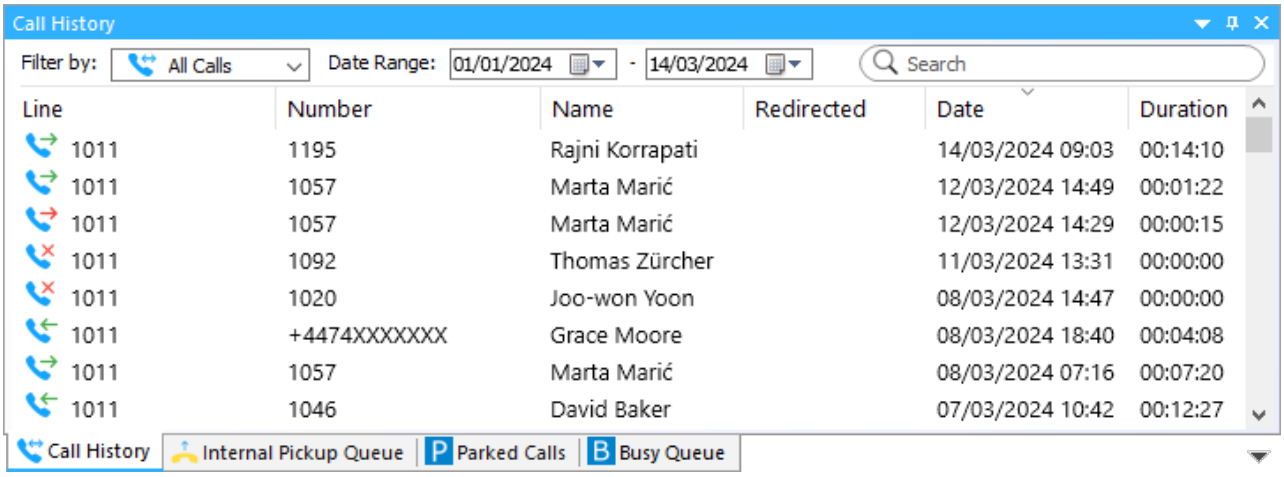


The handset icon right below the line in use represents the state of the call. A red icon means that a phone call is currently connected, an orange means that the device is either ringing or waiting for an outgoing call to be answered. The blue arrow next to the handset icon indicates the direction of the call; an arrow pointing towards the handset indicates an incoming call, an arrow pointing away from the handset indicates an outgoing call.

Pane “Calls”

This pane consists of four tabs:

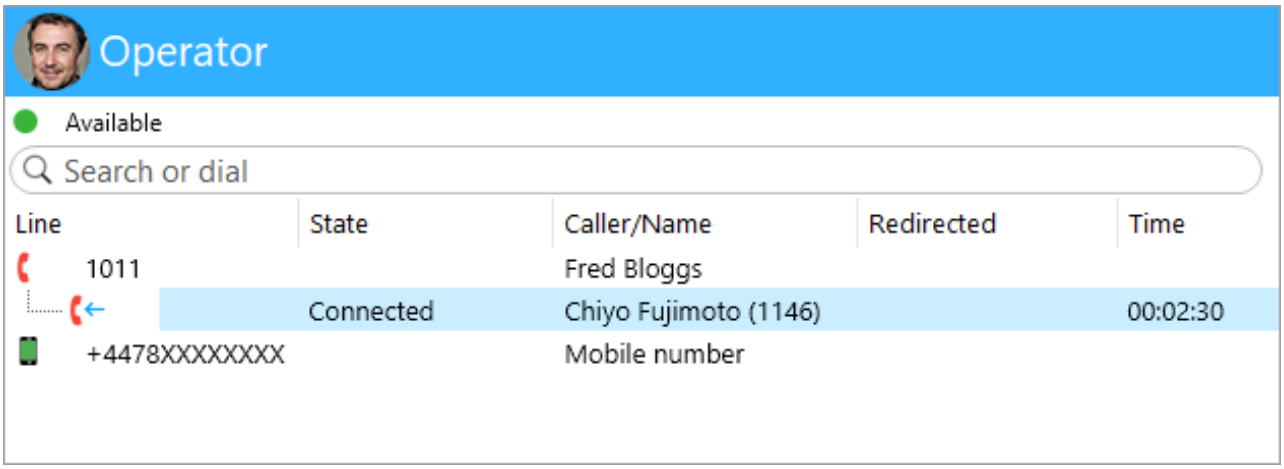
- Call History: Shows all the operator’s finished calls.
- Internal Pickup Queue: All incoming calls directed at a group which the user is part of will be listed here. These calls can be answered by the operator.
- Parked Calls: Shows all calls that are currently parked in the Callisto system (see Call options).
- Busy Queue: Shows all calls currently in Busy Queue (see Call options).



The call history can be filtered by type of call (received, called, missed and not answered), and by date. Additionally, the history can be searched by any known value (line, number, name, date, or duration). The search algorithm will show results that *start with* the search string.

Pane “Operator”

This section shows information about the operator, i.e. the user currently logged into COC at this machine.



Besides setting the presence state and status message of the operator, this pane features a search field labeled Search or dial. This is the global search field where the operator can search for contacts or directly dial a phone number.

The lower half of this pane contains information about the lines which are assigned to to the operator. In the screenshot above, the four-digit number at the top of the list is a CUCM line originating from the terminal assigned to the user. The number below is a Callisto line (see COC Configuratior – Callisto lines). The names of the Callisto lines are configured in CUCM.

The operator will see all incoming and outgoing calls in this section. If multiple lines are available, the operator needs to choose line which the call will be placed on: select a line by clicking on it and then dial the number.

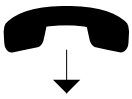
Call operations

The following operations call all be accessed from the Call Options section in the ribbon bar.

Place a call

Shortcut: Ctrl + Shift + D

To place a call, enter the destination number in the number box/search field in the Operator section and click the Dial button or press the return key. You can also select this option by right-clicking any line and choosing Dial from the context menu.



Hang up a call

Shortcut: Ctrl + Shift + E

Once call is active (either while dialing or being connected), you have the possibility to hang up the call by clicking the End button. You can also select this option by right-clicking the line and choosing End Call from the context menu.

Answer a call

Shortcut: Enter key

If there is an incoming call, you can answer it by clicking the Answer button. You can also select this option by right-clicking the call and choosing Answer Call from the context menu.

Hold a call

Shortcut: Ctrl + Shift + H

To put a call on hold, simply select it from the list in the Operator section and then click the Hold button. You can also select this option by right-clicking the call and choosing Hold Call from the context menu.

Resume a call

Shortcut: Ctrl + Shift + R

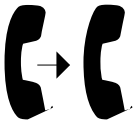
Select a call which is currently on hold and click the Resume button. You can also select this option by right-clicking the call and choosing Resume Call from the context menu.

Routing operations

In a scenario where an agent is talking to a customer and needs to consult with another agent, the initial agent can initiate consultation transfer. In that case, the original call is put on hold and a new call is placed between the first and second agent. After the agents have finished consulting, there are two possible options:

- The first agent ends the call with the second agent and resumes the call with the customer.
- The first agent transfers the customer to the second agent.

The respective operations are located in the Transfer section of the ribbon bar.



Initiate a consultation

Shortcut: Ctrl + Shift + T

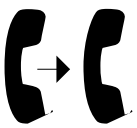
To initiate consultation transfer, enter the number of the agent with whom to consult and click the Consult button. At this point, the call with the customer is put on hold and the call with the other agent is started. This can also be done by dragging and dropping the call on the desired agent in the user list section on the left side. You can also select this option by right-clicking the call and choosing Consultation Transfer from the context menu.

Complete a transfer

Shortcut: Retrun key (while on call with the second agent)

To completely transfer the call to the other agent (i.e. initiating a call between the customer and the second agent and end the original call with the first agent), click the Complete button. You can also select this option by right-clicking the call and choosing Complete Transfer from the context menu.

If you don’t want to transfer the customer’s call to the second agent and resume the call with the customer instead, simply hang up the call with the second agent. The initial call can then be resumed normally.



Blind transfer

Shortcut: Ctrl + Shift + B

To transfer the customer to a second agent directly without first consulting with the second agent yourself, enter the number to transfer the customer to and press the Blind button. This way, you can also transfer the customer to numbers which are not in the contact list. You can also select this option by right-clicking the call and choosing Blind Transfer from the context menu.

Alternatively, hold down the control key, then drag and drop the phone call on an agent to whom the customer shall be transferred.

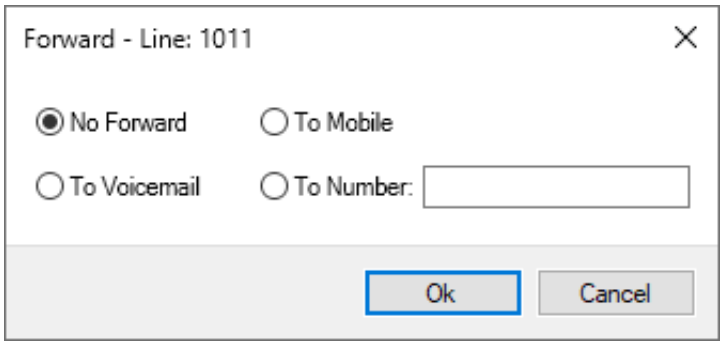
Redirect a call

Instead of transferring a call, the first agent can also redirect a call to a second agent while the prone is ringing: the call gets immediately directed to the second agent without initiating a call between the customer and the first agent.

To do so, drag a ringing call and drop it on the agent you wish to redirect the call to.

Call forwarding

If call forwarding is activated on a line, any incoming call to that line will be automatically redirected to the configured destination. To set call forwarding on a particular line, right click on a line and choose Forward from the context menu to access the forwarding configuration dialog box.



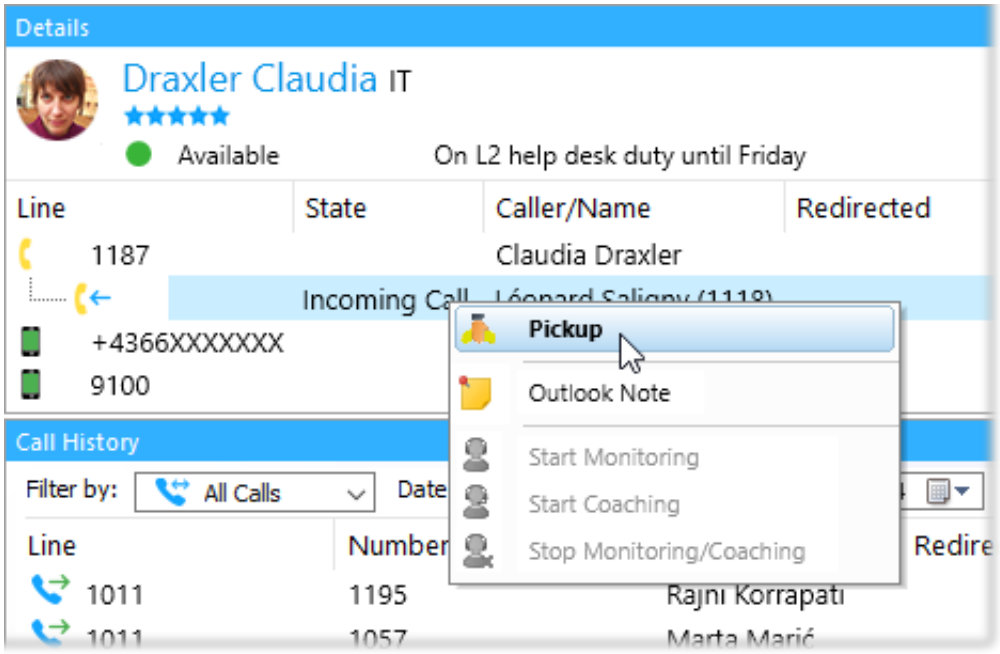
From this dialog box, forwarding to a pre-configured mobile number, voicemail, or a custom number can be set. The To Mobile option will forward calls to a Callisto line associated with the operator.

If multiple Callisto lines are available, you need to select the line you want to use for forwarding before opening the forwarding configuration dialog box.

If there are no Callisto lines associated with the operator, the To Mobile option will be disabled.

Intercept a call

If you select any agent from the *Users* pane, the current status of the agent's devices can be seen in the *Details* pane. If you observe an incoming call on one of the agent's devices, you can intercept the call by right-clicking it and choosing Pickup from the context menu. This way, the call will be connected to you directly without any action from the original agent's device.



All currently ringing calls that you have permission to intercept can also be seen in the *Internal Pickup Queue* tab in the calls-related pane.

Conference operations

Start a conference

Shortcut: Ctrl + Shift + C

If a call is currently connected, you have the option to start a conference. Enter the number of the contact you want to invite and then click the Conference button to initiate a conference. The first call will go on hold and a new call will be placed towards the invitee.

Alternatively, you can drag and drop any contact from the *Outlook*, *Users*, *Call History* or *Favorites* tabs on the connected call to start a conference.

You can also start a conference by right-clicking the call and choose Conference from the context menu.

Complete a conference

Shortcut: Enter key

Once you started a conference and selected all participants, you can initiate the conference call by clicking the Complete button.

You can also immediately complete a conference by holding down the control key while dragging a contact.

Once the conference call started successfully, all conference participants and their information details like number, nameThe name is available for internal contacts, or may be provided by CUCM., and duration in the call will be displayed inside the *Operator* pane.

The conference owner is indicated by a crown icon.

During a conference call, additional participants can be added, and the conference can be recorded. These options are available by right-clicking on the conference inside the *Operator* pane. The End Conference option is only available if you are the owner of the conference. This will remove all parties from the call.

You can remove any specific conference participant by right-clicking the participant and choosing Remove Participant from the context menu.

Call parking and busy queue

Park a call

Shortcut: Ctrl + Shift + P

Call parking is a feature where the agent puts a call on a special kind of hold from where it can be picked up by any other agent.

To put a ongoing call on hold, select it and click the Park button. You can also right-click the call and choose Park Call from the context menu.

Alternatively, you can drag the call and drop it on the *Parked Calls* tab(inside the calls-related pane) to immediately park the call.

Pick up a parked call

To retrieve a parked call, go to the *Parked Calls* tab and double click on the parked call which you want to retrieve. Alternatively, you can dial the park number which can be found in the *Parked Calls* tab next to the corresponding call.

Busy queue

Shortcut: Ctrl + Shift + W

If you want to redirect a call to an agent whose phone is currently busy, you can place the call in the agent's busy queue. The call will be on hold until the agent is available: once the agent ends the current call, he will be connected to the call in the busy queue immediately.

You can also put a call on the busy queue by right-clicking it and choosing Put Call on Busy Queue from the context menu. Alternatively, drag the call while holding the Shift key and drop it on the *Busy Queue* tab in the calls-related pane.

Once you put the call on the busy queue, it will appear in the *Busy Queue* tab in the calls-related pane. Here, the agent can see all calls he put on the busy queue, and if he has permission to see other agents' queued calls, they will be visible in the list as well.

If you redirect a call to an agent who is currently in a call or conference, the redirected call is placed automatically in the agent's busy queue as well. The answer will not be disturbed during the call and will get connected to the transferred call in the busy queue once the previous call has ended.

Any call can be picked up by double-clicking it.

Call recording

In order to be able to record calls, *Built-In-Bridge* needs to be enabled on all involved devices via CUCM. Call recording will automatically stop when a call is hung up. All call recordings can be found on Callisto.

In most countries, recording telephone calls is subject to legal restrictions regarding privacy and data protection. Make sure to adhere to any applicable national and international laws when conducting call recordings.

Start a recording

Shortcut: Ctrl + Shift + S

To record an ongoing call, click the Start button in the ribbon bar's *Call Recording* section. You can also initiate a recording by right-clicking the call and choosing Start Recording from the context menu.

Stop a recording

Shortcut: Ctrl + Shift + Q

To stop a call recording, click the Stop button in the ribbon bar's *Call Recording* section. You can also stop the recording by right-clicking the call and choosing Stop Recording from the context menu.

Monitoring and coaching operations

Operators have the possibility to monitor calls and to coach other agents.

- *Monitoring* means an operator is observing a call without actively participating in it, i.e. neither of the two other callers can hear the operator.
- *Coaching* allows an operator to coach another agent while the agent is in a call with a customer. The coach can only be heard by the agent, allowing the coach and the agent to talk to each other while the customer communicates only with the agent.

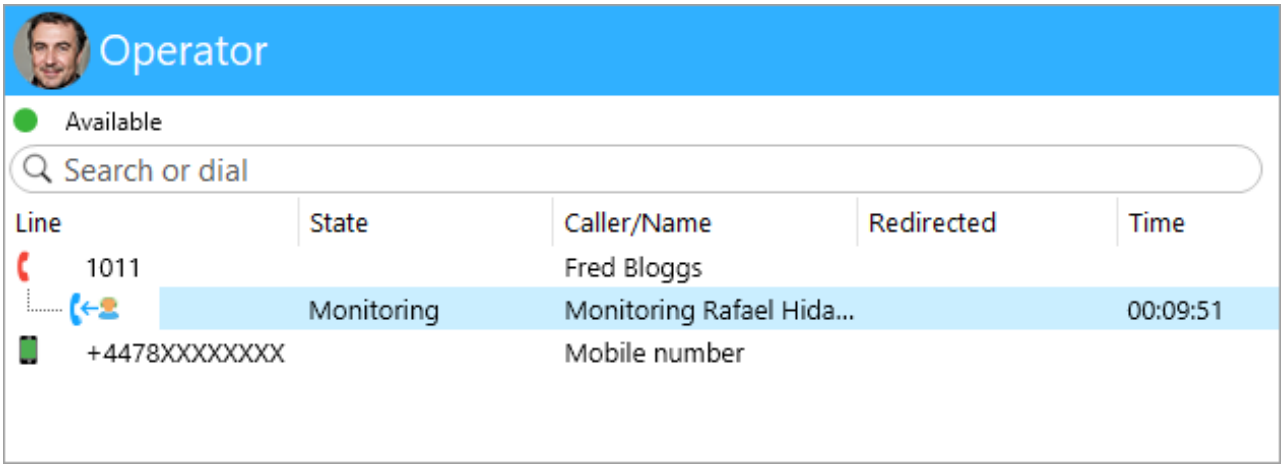
In order to be able to use monitoring and coaching operations, *Built-In-Bridge* needs to be enabled on all involved devices via CUCM.

In most countries, monitoring telephone calls is subject to legal restrictions regarding privacy and data protection. Make sure to adhere to any applicable national and international laws when monitoring calls.

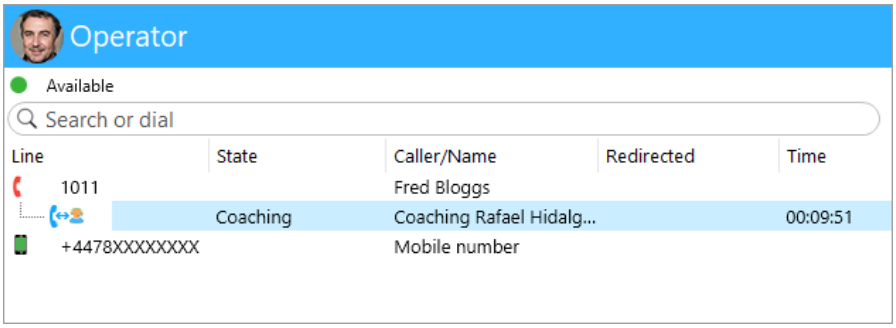
To start monitoring or coaching, select an agent who has an active call. Then click on the call an click either Monitoring or Coaching from the ribbon bar to start the respective action. Alternatively, right-click on the call in the *Details* pane and select either Start monitoring or Start coaching from the context menu. Switching between monitoring and coaching is possible by clicking the respective button on the ribbon bar.

To stop monitoring or coaching a call, click the Stop button on the ribbon bar's *Monitoring/Coaching* section. Alternatively, the monitoring/coaching session can be stopped by right-clicking the call and choosing Stop Monitoring/Coaching from the context menu, or by disconnecting from the call.

You can see the call you're monitoring or coaching in the *Operator* pane.



Operator pane: Monitoring a call

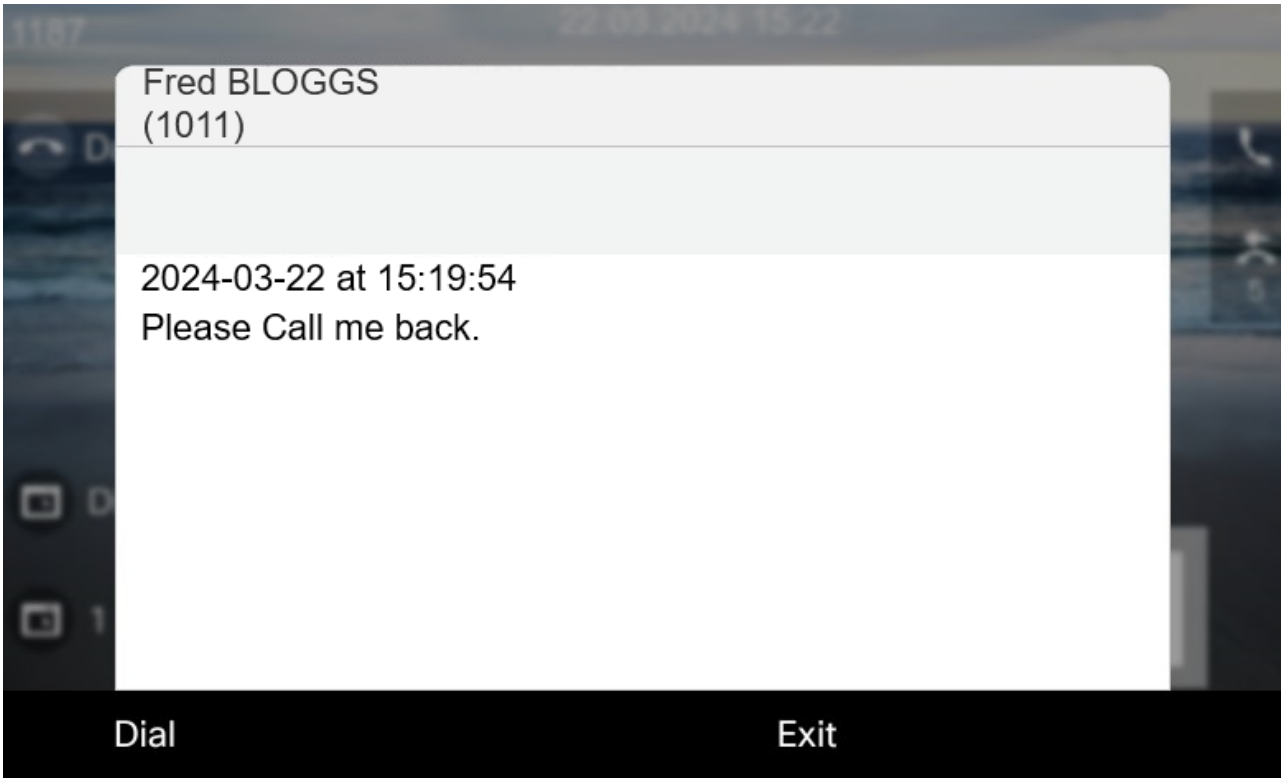


Operator pane: Coaching a call

Callback and voicemail

Send a callback request

With the COC Client, operators have the possibility to send callback requests to users. Select the user you want to send the request to and click the Operator Callback button from the ribbon bar. Alternatively, you can right-click the user and choose Send Callback Request option.

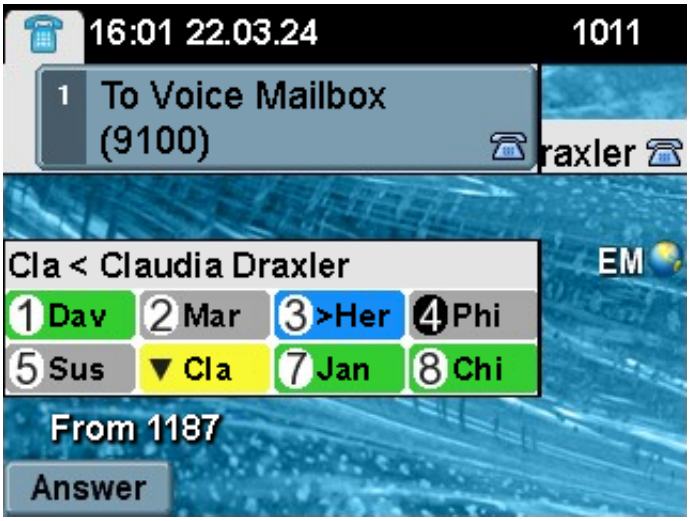


The callback message as seen on the addresse's phone.

After sending the callback request, the user will receive a text message on their Cisco IP Phone, containing the request message, details of the senderThe details contain the name and number of the sender, as well as the date and time when the callback message was sent., and two options: Dial and Exit. Choosing Dial initiates a callback to the sender immediately while Exit ignores the request and will return to the phone's previous screen.

Send a voicemail

The operator can also send a voicemail instantly by selecting the user and clicking the Send Voicemail button.



An incoming call for recording a voicemail, as seen on the operator's phone.

After clicking the button, the operator will receive an incoming call from voicemail. Answer the call to record the message.

After hanging up, the voicemail will be delivered to the user, receiving a notification and the option to listen to the voicemail.

Outlook and Exchange operations

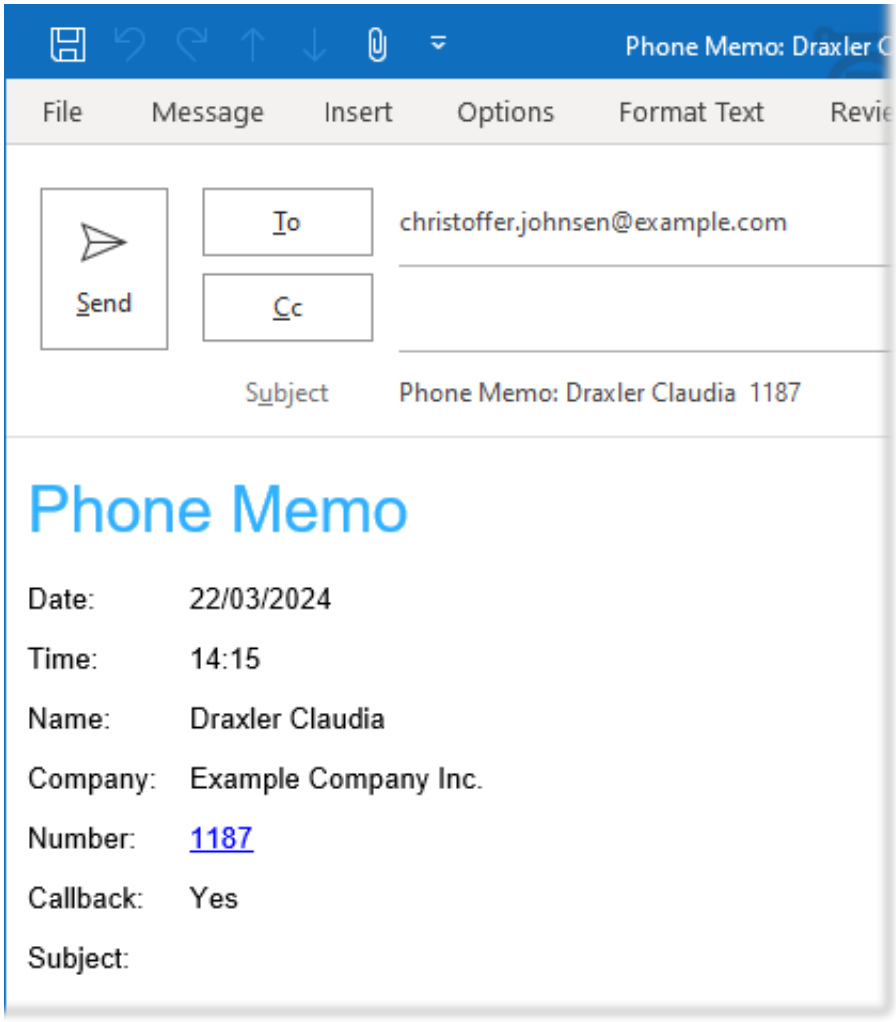
The following functionalities are only available if Outlook features are enabled. Go to Settings > Outlook and make sure that Enable Outlook Features is checked.

Create an Outlook contact

You can create an Outlook contact from the remote party of a call by right-clicking the call and choosing Create Outlook Contact from the context menu. Microsoft Outlook's *New Contact* window will appear, the Phone number field being populated with the phone number of the call. Any other info can be entered manually. This option is available for current calls as well as completed calls (i.e. call history entries).

Phone memo

The operator can write a phone memo during or after the call. Select a call from either the *Calls* or *Operator* pane and click the Phone Memo button from the ribbon bar. Alternatively, you can right-click the call and choose Phone Memo from the context menu. Microsoft Outlook will open a *New Email* window with the mail body containing several call details in a pre-formatted view. If you also have a user selected in the *User* pane, the mail's To field will be populated with the user's mail address. You can edit the mail manually before sending it.



Customize phone memo template

You can customize the template of the phone memo by creating a template file using HTML and embedded CSS.

The following code shows the the default template used by COC, which you can use as a base for your custom template.

```
<html>
    <head>
        <style type="text/css">
            td {height: 28px; font-family: Arial; font-size: 10pt;}
        </style>
    </head>
    <body bgcolor="#ffffff">
        <table border="0" cellspacing="0" cellpadding="0">
            <tr>
                <td colspan="2" style="padding-bottom:10px;">
                    <h2><font color="#30B0FF" face="Arial">Phone Memo</font></h
2>
                </td>
            </tr>
            <tr>
                <td>Date:</td>
                    <td width="800px">@Date@</td>
            </tr>
```

```
            <tr>
                <td>Time:</td>
                <td>@Time@</td>
            </tr>
            <tr>
                <td>Name:</td>
                <td>@Name@</td>
            </tr>
            <tr>
                <td>Company:    </td>
                <td>@Company@</td>
            </tr>
            <tr>
                <td>Number:</td>
                <td>@PhoneNumber@</td>
            </tr>
            <tr>
                <td>Callback:</td>
                <td>Yes</td>
            </tr>
            <tr>
                <td>Subject:</td>
                <td></td>
            </tr>
        </table>
    </body>
</html>
```

You can use the following wildcards to insert the call details into the template:

@Date@	The date of the call
@Time@	The time of the call
@Name@	The name of the caller
@Company@	The company of the caller
@PhoneNumber@	The phone number of the call

Safe the HTML file under the name PhoneAnnotation.htm at the location <*user directory*>\Documents\CTModule\COC\.

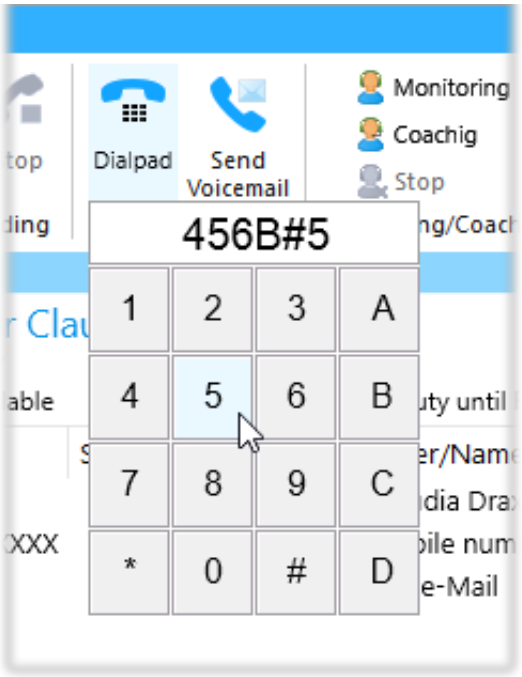
The file extension needs to be .htm, not .html.

The custom HTML code will be used as email template whenever you create a new phone memo.

Exchange synchronization

COC Clients can synchronize with Microsoft Exchange through Callisto: Users can have their presence state automatically changed based on their Exchange calendar. For example, if a user has an appointment entered in his Exchange calendar, the COC Client will set his presence state to “busy” during the time of the appointment. Additionally, during Outlook meetings, details such as the meeting description, location and the time are displayed in the *Details* pane and the *Operator* pane.

Miscellaneous operations



Use DTMF signaling

COC has the capability to send DTMFDual-tone multi-frequency signaling digits, for example when navigating IVRInteractive voice response menus. Click on the Dialpad button and dial pad will appear where you can send DTMF digits by clicking on the corresponding button.

Delete call history

Call history entries can be deleted by selecting one or multiple entries, right-clicking the selection and choosing Delete Record(s) from the context menu. A confirmation dialog will appear and after confirming the action, the selected call history entries will be deleted.

Set a presence state and status message

To change your own presence state, click on the presence state icon in the *Operator* pane. A drop-down menu will appear and to choose the presence state. The personal status message can be changed by clicking the text field next to the presence state icon. Save the status message by either pressing the Enter key or by clicking away from the text field. If no status message is set, the following placeholder text will be displayed instead:

<Enter personal status message>

If you have permission to change other users' presence states and status messages, you can do so by selecting a user from the *Users* pane and changing the presence state and status message in the *Details* pane.

Favorites

You can add users to the *Favorites* list by right-clicking a user and choosing Add to Favorites from the context menu. Alternatively, you can drag a contact from the *Users* pane and drop it on the *Favorites* pane.

You can access your favorites from the *Favorites* pane, which is by default located on the far right side of the COC window. Right-clicking on the pane shows a context menu where you can add a new favorite, edit or delete an existing one (if one is selected), or you can import favorites from a CSV file.

Import favorites

Favorites can be imported from a CSV file. Applications like Microsoft Excel allow for export in the CSV format.

The file needs to have the following properties:

- The separator must be a semicolon (;). This is the standard separator when exporting an Excel file to CSV.

- Every line represents one contact, containing the following values:

    1. Phone number
    2. Last name
    3. First name
    4. Company
    5. Type of phone number (can be either BUSINESS, PRIVATE, or MOBILE)
- The phone number and either the first or last name need to have a non-empty value. The other values may be empty.
- The line ending must be of the format \r\n. While this is standard in Windows, different line endings are used in Unix and Unix-like systems. Make sure that the correct line endings are used, especially when the file was created on macOS or Linux.

If a row is not valid, it will be skipped during import. Any duplicate rows in the CSV file or contacts that already exist in the COC favorite list will be skipped as well.

The import process is as follows:

1. Prepare a CSV file with your favorites entries as specified above.
2. In the *Favorites* pane, right click inside the pane and choose Import Favorites from the context menu.
3. In the *Import Favorites* dialog, click on the Browse button and locate the CSV file.
4. Click on the Import button to start importing your favorites.
5. During the import, a progress bar on the *Import Favorites* dialog will show the progress of the import. Once the import has finished, the dialog will close and all the imported favorites will be visible in the *Favorites* pane.

User groups

Operators can create custom user groups that are only be visible to them. (These groups can contain users that are in groups which are already visible to the operator.)

Create a group

To create a user group, click the COC icon in the top-left corner and choose Manage User Groups from the pull-down menu. A new window will open, containing the three areas *User Groups*, *Assigned* and *Users*.

Right-click on the *User Groups* area (on the very left) and select New User Group from the context menu. After that, the *Users* area (on the very right) will be populated with all the available users. Select one or multiple users and click on the blue leftwards arrow to add them to the group. After clicking the Ok button in the bottom-right corner of the dialog, the new user group will be created and assigned to the operator. It will appear as a new a tab at the bottom of the *Users* pane.

Delete a group

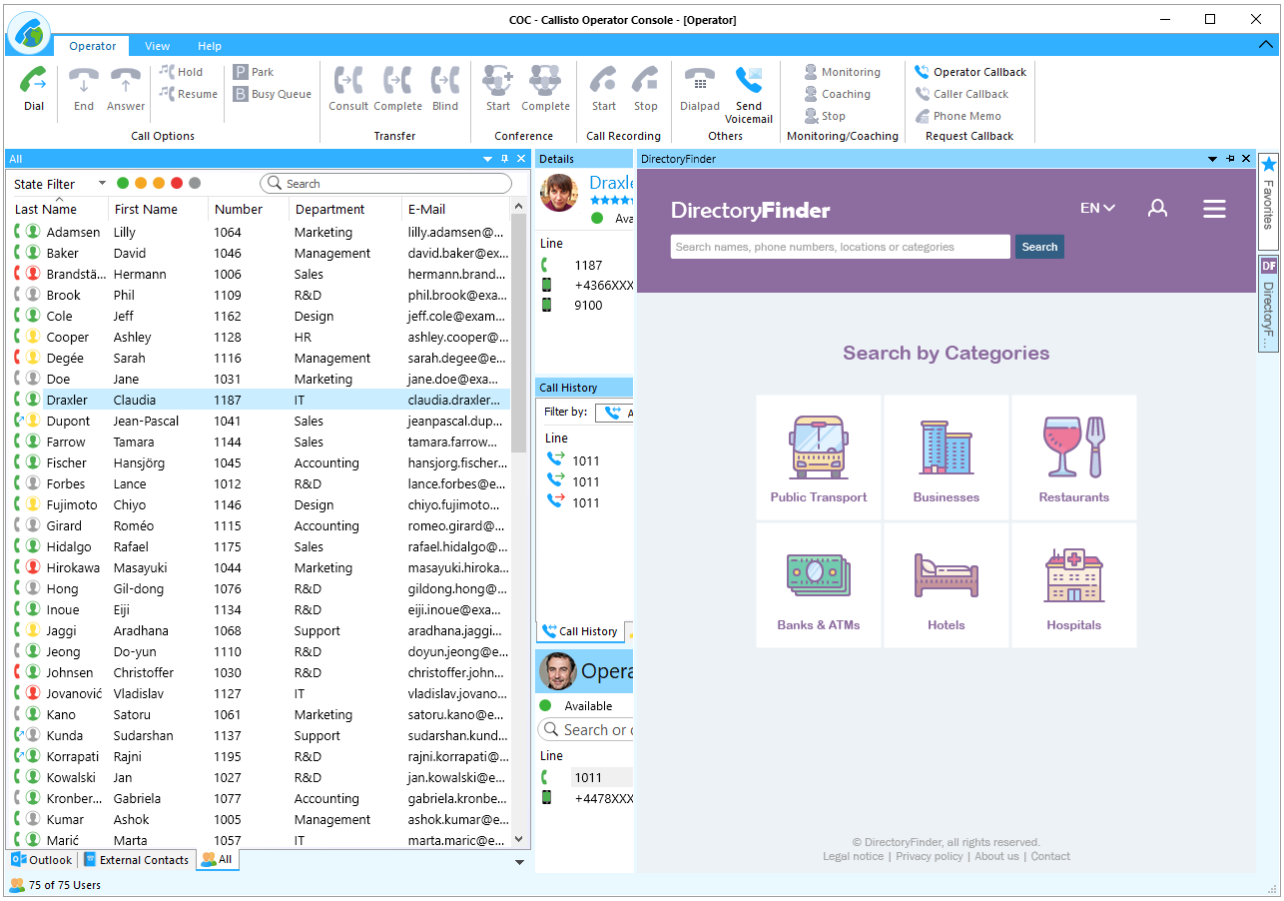
To delete a user group, click the COC icon in the top-left corner and choose Manage User Groups from the pull-down menu. In the *User Groups* area, right-click the group you wish to delete and choose Delete User Group from the context menu. After confirming the action, the user group will be deleted.

Rename a group

To rename a user group, click the COC icon in the top-left corner and choose Manage User Groups from the pull-down menu. In the *User Groups* area, right-click the group you wish to rename and choose Rename User Group from the context menu. The new name will be saved by either pressing the Enter key or by clicking outside the text box.

HtmlPanes

The COC client allows to display web pages inside the application with HtmlPanes. Administrators can determine which pages can be displayed using the COC configurator (see COC Configurator manual – Settings and Assignments). Once a web page is defined, you can access it by the tabs at the rightmost side of the COC client's main view.



Example of an external website as HtmlPane in the COC client.

To hide an HtmlPane, click anywhere outside the pane.

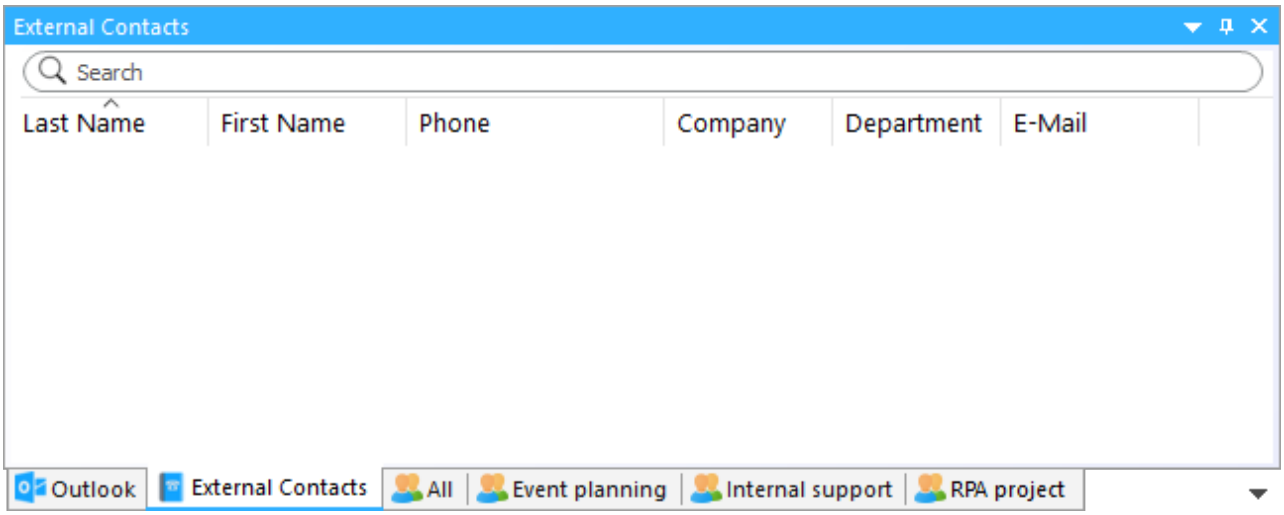
Some Callisto modules like ProfACD use HtmlPanes, so their functionalities can be used from within the COC client. Refer to the respective modules' manuals on their HtmlPane integration.

Microsoft Dynamics CRM integration

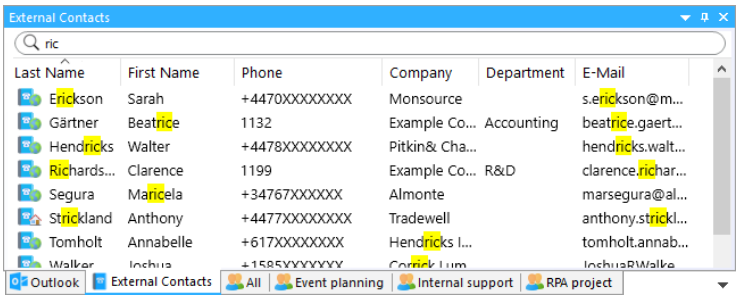
Callisto allows for Microsoft Dynamics pop-ups to appear during incoming calls. Based on the phone number of the incoming call, information on the related contact or lead will be shown. If the number is ambiguous (e.g. because multiple contacts or leads match the number), an additional pop-up will display a list of all contacts and/or leads that match the number. You can select the appropriate contact or lead from either pop-up.

External contacts

In the *External Contacts* tab of the *Users* pane, you can search for external directory entries which are available on Callisto.



The default view of the *External Contacts* tab.



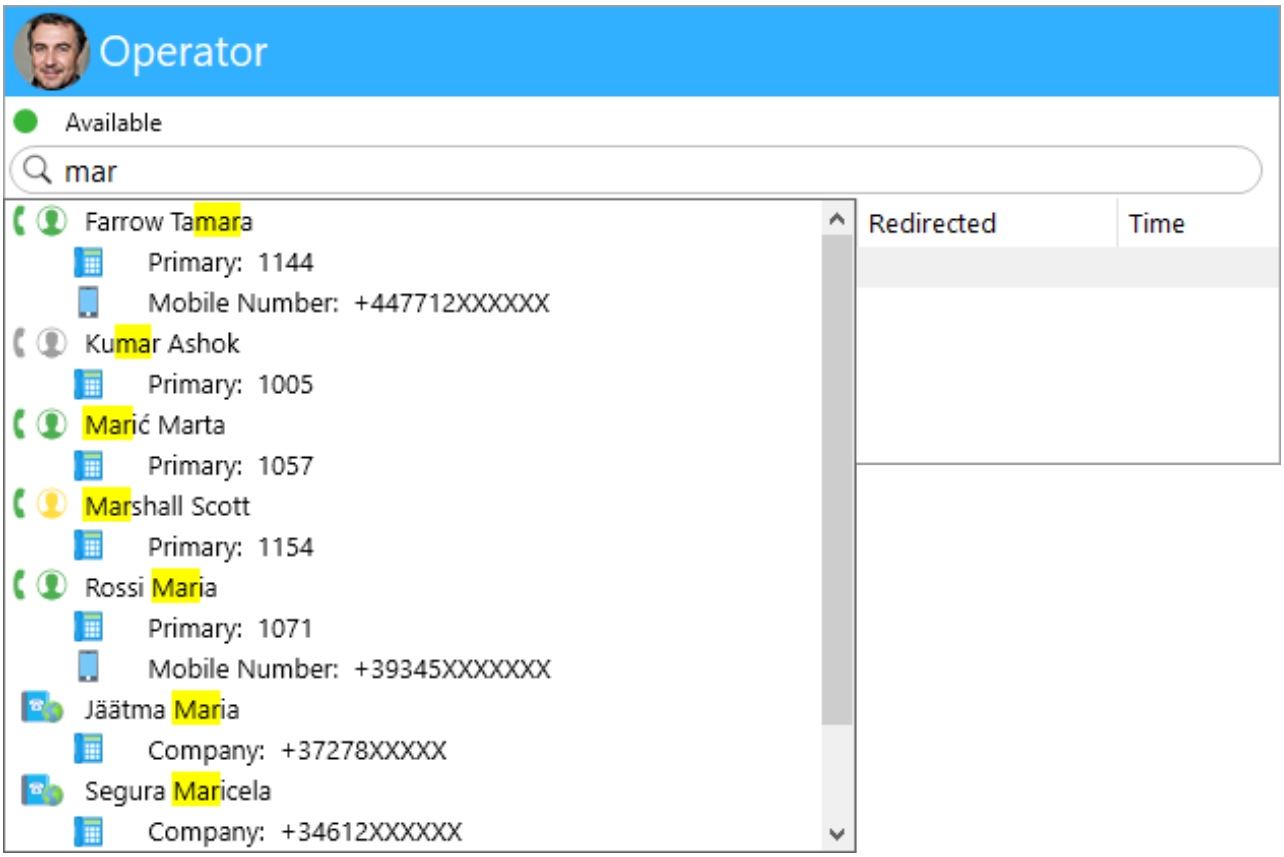
Search results in the *External Contacts* tab.

By default, the list appears empty. If you type a query in the search field at the top of the pane, matching results will be listed immediately. To list all external contacts, type the * wildcard in the search field.

Depending on the number of contacts saved in Callisto, listing all external contacts can take some time.

Global search

The global search field is located in the *Operator* pane and has the capability to search any contact in a single place. Typing in this text field will show all matches from any entity.



The search results are sorted by kind of entity and are displayed in the following order:

1. COC users
2. Favorites
3. Outlook contacts
4. External contacts

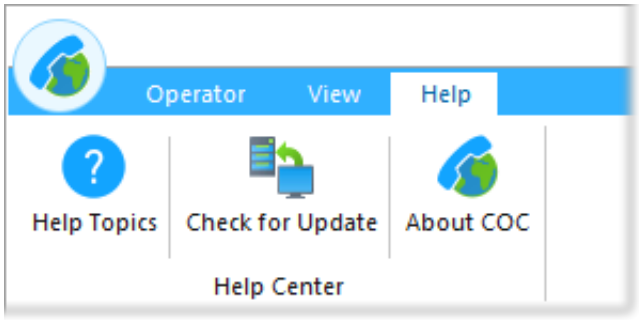
The fields searched during global search include the first and last name, phone number, email address, company name, and department name.

Clicking on a contact from the search results will reveal and select the contact in its respective pane, e.g. in the *User* pane's *All* tab if it is a COC user or in the *Favorites* pane if it is a Favorite entry.

Furthermore, the global search field can be used to dial a phone number. By entering a phone number and pressing the Enter key, a call will be initiated using your primary device.

Help menu

In the ribbon bar, select the Help tab to access the following options.



Help Topics

This option opens up a help document containing information about navigating and using features in the COC client.

Check for Update

As the name suggests, this option checks for updates and if there are updates available, it will prompt you if you want to update COC Client. Click Yes to update the COC client to the latest version. To check for updates, an Internet connection is required.

About COC

This option shows information about the current COC client version and build number. This information is useful for COC support and the development team to solve any problems that might occur.

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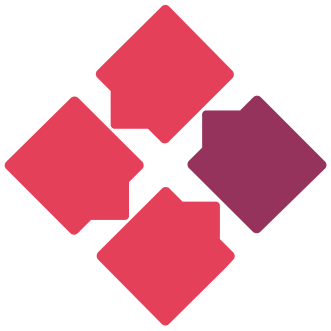

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