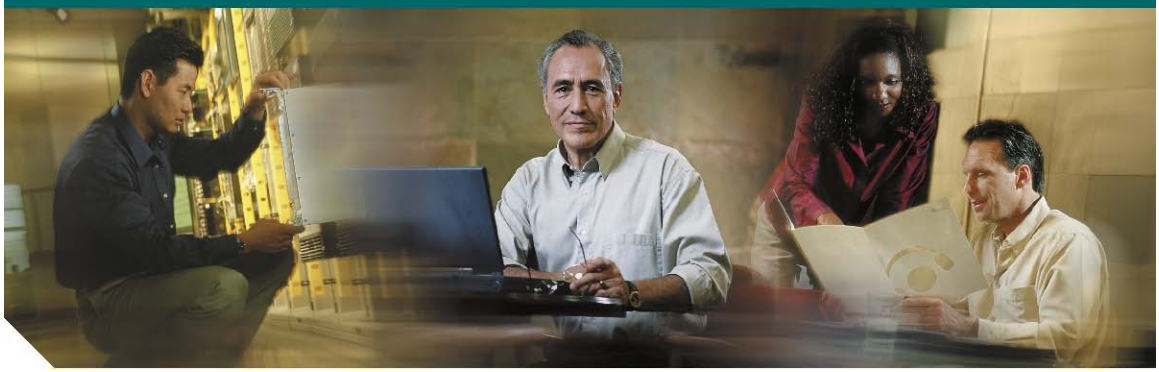
Quick Reference



Cisco Smart CallConnector Operator Quick Reference Guide

1 Overview

The Cisco Smart CallConnector Operator is a Windows application specialized for the call handling, user presence monitoring and information access requirements for the operator positions of small to mid-size organizations running the Cisco IP-telephony services from the Cisco Smart Business Communication System (SBCS). Operators can:

- Handle incoming calls quickly and transfer them to the appropriate and available employees with ease.
- View incoming calls to be answered at a glance, plus the status of parked, transferred, and held calls.
- Quickly search for users in the directory and maintain the organization's directories.
- View and update the availability, location and telephone status of all the employees.
- Easily send email or text (SMS) messages to employees that are not available to take calls

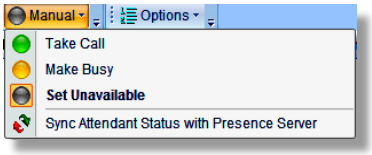
2 Starting and Logging In

Starting CallConnector Operator

Step 1 Double clicking on this icon on your desktop or open the application from Start → All programs → Cisco Systems → Cisco Smart CallConnector Operator → Cisco Smart CallConnector Operator. The Login screen will display.

Step 2 Enter your server IP, username, and password. Click on **Login** button or press Enter to sign in.

Step 3 When ready to receive calls, select "**Take Call**" from the pull-down list in the Call Queue toolbar. This will reset the call forwards or log you into the hunt groups to allow the phone to receive incoming calls.



Exiting CallConnector Operator

Step 1 Change your status to **Set Unavailable** from the Call Queues toolbar. The CallConnector Operator will log you out of the call queues and forward calls to Night Routing Number.

Step 2 Select File-Exit or press ALT+F4. The application will close all windows and exits.

Logging out Cisco CallConnector Operator

Step 1 Change your status to **Set Unavailable** from the Call Queues toolbar. The CallConnector Operator will log you out of the call queues and forward calls to Night Routing Number.

Step 2 Select Log out from the File menu. The CallConnector Operator will present the Login prompt.

Getting Help

Step 1 Click on Help menu and select Contents. You can also press F1 to open the help window.

3 Navigating the Operator Windows

The Cisco Smart CallConnector Operator application is comprised of the following main functional areas:

- Call Control Window — Lists in lines/calls on the operator's phone and provides access to features.
- Directory Window — Displays contact information and provides search and auto-dial features.
- Actions Bar — Provides one click access to messaging and selected contact's t numbers.
- Queues/Phone Status — Displays incoming operator calls in a queue and the status of extensions.

Each of these windows can be accessed using their shortcut keys or clicking on the tab for the overlapped windows. Shortcut keys and the display font can be customized for each PC. The windows can also be re-sized and re-positioned to suite individual needs.

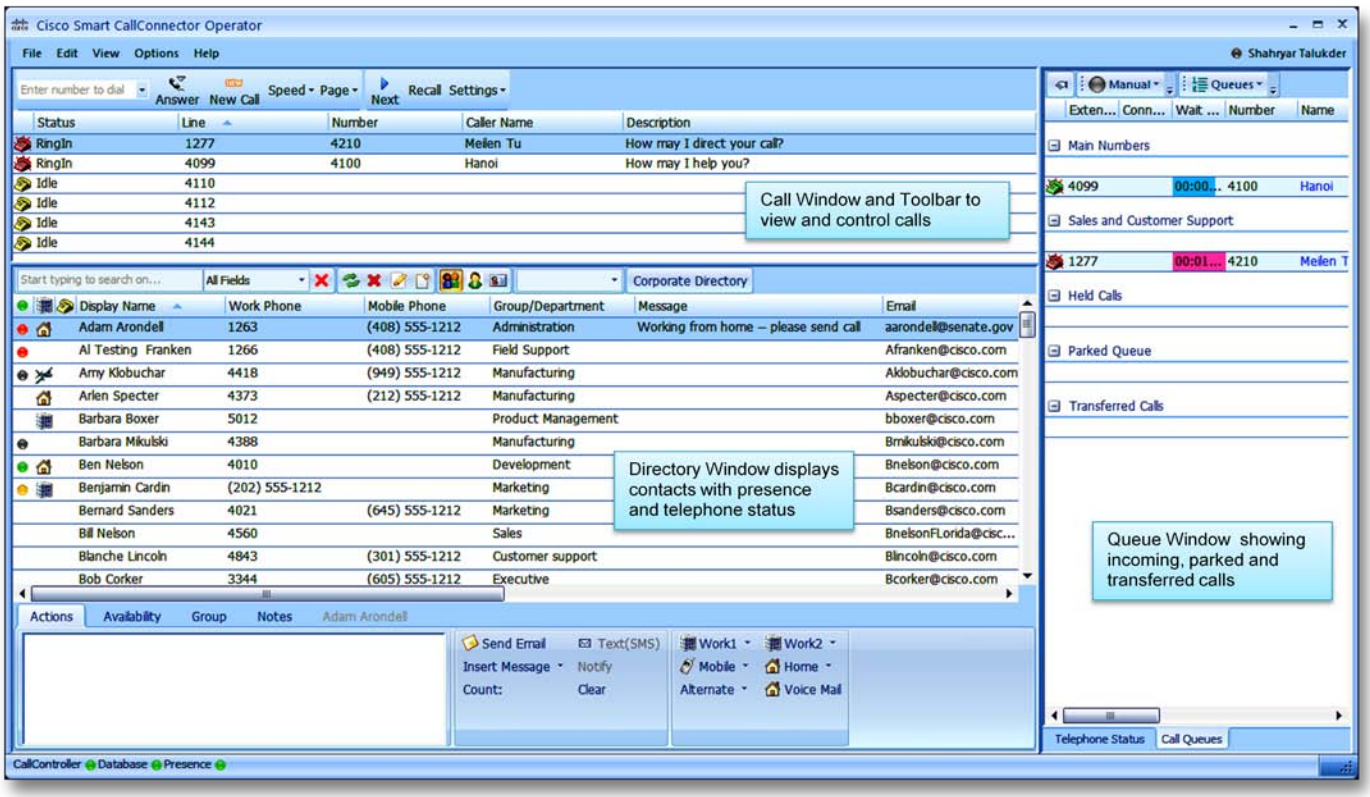


Figure 1 CallConnector Operator Windows

Window Region	Features available from this window
Call Window and Toolbar	This window displays the status of all lines and calls on the operator's phone. Operator's can make, answer and access telephony features by selecting a call and clicking of the feature buttons in the toolbar or from the right-click menu.
Directory Window and Toolbar	Provides a searchable list of contacts from which operators can make calls, send messages, and update presence status. Telephone status (idle, ringing and connected) and presence information (available, busy, away and unavailable) are displayed for each Corporate directory contact. The CallConnector supports four directories – Corporate, External, Personal and Outlook. Operators can enter any text associated with contact to locate it – including name, number, department etc. Operators can also drag-n-drop to make or transfer calls
Queues Window	This window displays the call queues for incoming calls, held calls, parked calls, and the transferred calls. The operators can see the waiting calls, answer highest priority or a specific call. Calls are displayed in the queues until they are answered. Calls transferred by the operator or placed on Park can be retrieved
Action Bar (not shown)	For the selected contact in the directory, the action bar allows the Operator to dial, transfer, pickup and conference alternate numbers, send messages, update availability and call forwards, view group members and update notes.
Telephone Status Window (not shown)	Displays the current telephone status of the Cisco Router extension numbers. It can display the ringing and connected call states.

Table 1 Description and Accessing the CallConnector Operator Windows

4 Call Handling

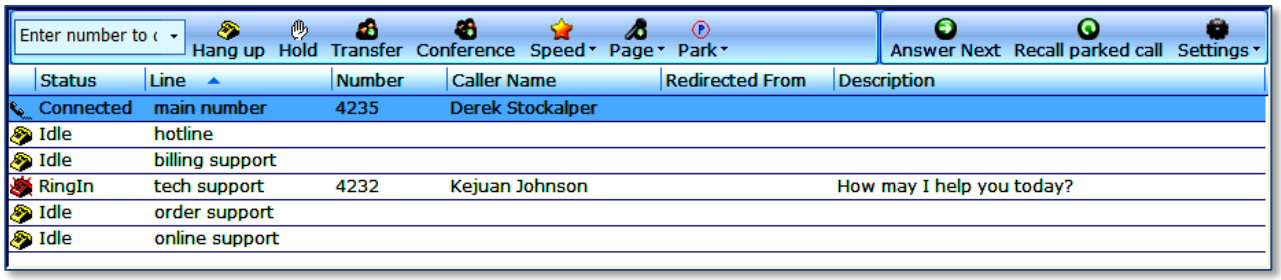


Figure 2 Call Window and Toolbar

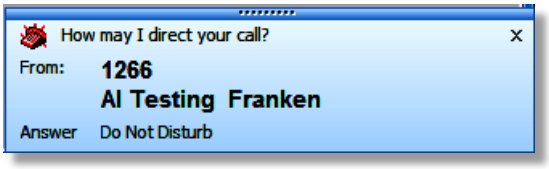
To Answer a Call

Option 1 Click on the **Answer Next** button, or press the **Num-Plus** key, the longest waiting, highest priority ringing call or (if there are no ringing calls) held call will be connected.

Option 2 Click on the call in the window and then **Answer** in the toolbar or from the right-click menu. You can also **double-click** on the alerting line. The selected incoming call on that line will be connected.

Option 3 **Double-click** or right-click and-select **Connect** on a ringing call from the Queue window to answer it.

Option 4 Click **Answer** in the Call Notification window. This pop-up window is displayed for each incoming call.



Option 5 Set Automatic Answer from the Settings menu. With this option, the highest priority incoming calls will be automatically connected.

Note

1. If you were connected to a party, that call will be put on hold
2. If you are making an outgoing call that has not completed, then this call will be dropped.
3. The greeting message for the queue will be displayed in the description field.

To Transfer a Call

Option 1 Select the connected call, enter the number in the Number field and click **Transfer** from toolbar button or right-click menu or press **Num-Delete** (Transfer) shortcut key. When the call rings or connects, click **Complete Transfer** or press **Num Delete** again.

Option 2 While on a call, **double-click** a contact in the directory or **right-click** and select a number from the menu. You can also drag the contact to the connected call.

Option 3 While on a call, select a contact in the directory and **click on a number** in the Actions bar.

Option 4 Highlight the call and **select a number** form the Speed menu in toolbar or press the shortcut key.

Note

If you have Auto Transfer option enabled, you need not to click on Complete Transfer to complete the transfer. Please see user guide for more options.

To Reconnect a Transferred or Parked Call

Option 1 Click **Recall Parked Call** button in toolbar to reconnect to the longest waiting call in the parked or transferred call queue.

Option 2 **Double-click on a specific call** in the Parked or Transferred queue to pick up or right-click on the call and **select Connect**. The call will be picked up and connected to the operator's phone.

To Make a Call

Option 1	Enter a number from numeric keypad and click on the **Dial** button or press the **Num Delete** shortcut key.
Option 2	**Double click** on a contact in Directory. You can right click the contact to dial an alternate number.
Option 3	Click on a contact in the Directory and **drag to an idle line** in Call window.
Option 4	Select a directory contact, and from the **Actions Tab, click on a number** to start dialing. Go to View→Action Bar from the menu if tab not displayed.
Option 5	Select an idle line and click on **Speed**. From the menu, **select a category and number** to dial.

To Hang-up a Call

Step 1	Click on the Hang-up button or press the Num Enter key. The current call will be dropped.

To Hold and Reconnect to Held Calls

Step 1	Select the call that you wish to put on hold and click on the **Hold** button or press **Num Minus**, or **select Hold** from right-click menu.
Step 2	To retrieve the held call, **double-click** on the held call or select the held call and click on **Resume** or press **Num Minus** to retrieve the held call

To Pick Up a Call

Option 1	Enter the number to pickup in the Number field and click **Pickup** or press Ctrl + Num *
Option 2	**Right-click on a contact** with a ringing phone and **select Pickup** to connect to the selected contact.
Option 3	Select a contact in the directory. In the Group tab of the Action bar, click on **Pickup Available** for the first ringing call in the group or select a ringing number and click on the **Pickup** button.
Option 4	To pick up the highest priority longest waiting ringing call from a group, enter or select the group number in the number. Then click **Group Pickup** button on the call toolbar.

To Park and Reconnect to a Parked call

Step 1	While on a call, click Park button or press Ctrl + Num-Backslash to park the current call. You can also select a specific park number from the Park menu.
Step 2	The call will be transferred to a parked slot and will be displayed in the Park Queue.
Step 3	Double click on the parked call in the Park Queue window to reconnect to the parked call. Press **Recall Parked Call** to retrieve highest priority (timed-out) Parked or Transferred call.

To Conference a Call

Option 1	While on connected call and enter a number and click **Conference button** or select **Setup Conference** from right-click menu. When the called party answers the phone, click **Complete Conference**.
Option 2	While on a call, right-click the directory contact and select Conference. You can also drag the contact to the connected call. Then click **Complete Conference**, when call is answered.
Option 3	When connected to a call, select a directory contact and **right-click** on a number in the Actions Tab and **select Conference**. A conference call will be started to that number, click on Conference Complete.
Option 4	While on a conference call, enter the number and click Add. The conference will be placed on hold and an outgoing call is placed. Once the call is answered, click on the Complete Conference button.
Option 5	Select one of the calls that you want to bridge. Click on the Join button and then select the second call. The two calls will be bridged together.

5 Call Queues

This window displays the operator's incoming calls, held calls, parked calls, and the transferred calls.

Call Queue Types

Incoming Call Queues	These customer-defined queues display the incoming calls waiting to be answered.
Parked Calls	The park queue displays the calls parked by operator. If the call is not answered, then it can be pulled back.
Held Calls	Displays the calls on hold at the operator phone.
Transferred Calls	This queue displays the calls transferred by the operator that have not been answered.

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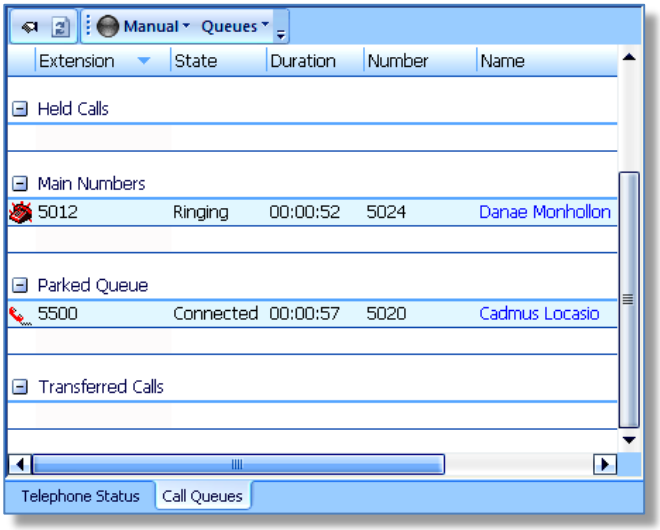


Figure 3 Call Queues Window

To Connect to a Specific Incoming Call

Option 1	Double-click on the call in the queue, or drag the call to the call window.
Option 2	Right-click on the incoming call in the queue and select Connect.

To Pickup Parked or Transferred Call

Option 1	Double-click on the call in the queue, or drag the call to the call window.
Option 2	Right-click on the Parked or Transferred call in the queue and select Connect.

To Make Available

Option 1	In the Queues toolbar, select **Take Call** to start receiving calls.
Option 2	Select **Sync Operator Status with Presence Server** and change the presence status to **Available** to log into all hunt groups and clear call forwards to start receiving incoming calls.

To Make Busy

Option 1	In the Queues toolbar, select **Make Busy** or **Set Unavailable** to log out of hunt group or set call forwards to redirect the incoming calls,
Option 2	Select **Sync Operator Status With Presence Server** and change the presence status to **Busy or Unavailable** to log out of all hunt groups and set the call forwards to redirect the incoming calls.

6 Using the Directory

The Directory window displays information on people, their contact numbers, and notes. There are four directories – Corporate, External, Personal and Outlook.

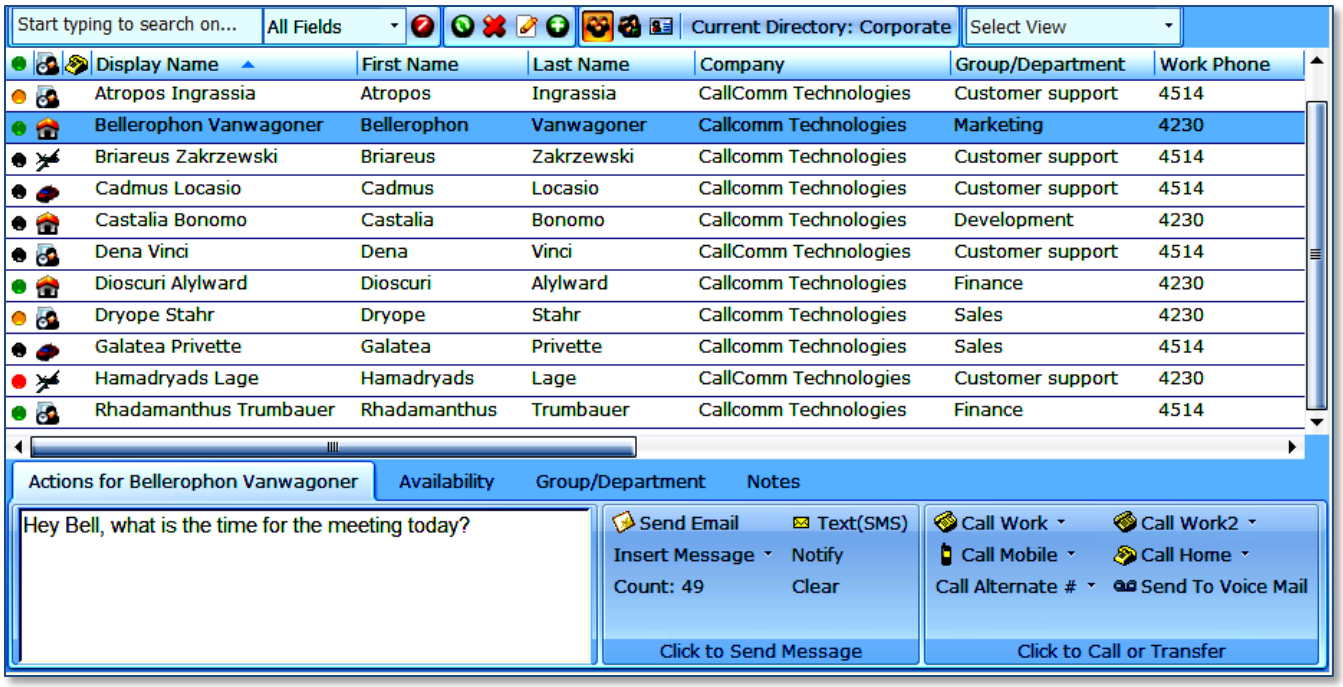


Figure 4 Directory Window and Toolbar

Search Edit Select Directory View

To Locate a Contact

Step 1 **Type in the first few characters** of the name or number of the contact you are searching. Enter space and additional text to narrow the search. The Directory window will display the entries that match this text.

Step 2 To **clear the query**, click on the Clear Query button of the directory toolbar or delete the search text. The CallConnector Operator will display the full directory listing.

To Dial From Directory

Option 1 Locate the entry that you want to call and **double-click** on that entry or press Enter or **F9**.

Option 2 **Drag** an entry to an idle line in Call window.

Option 3 **Right click** on an entry and select one of the multiple listed numbers to dial.

To Transfer From Directory

Option 1 Select the connected call and **double-click** on the directory contact or press **F9**. You can also press Enter twice. Upon ringing or answer, click on Transfer Complete to release the call.

Option 2 **Drag** the call and **drop** it on a contact in the directory.

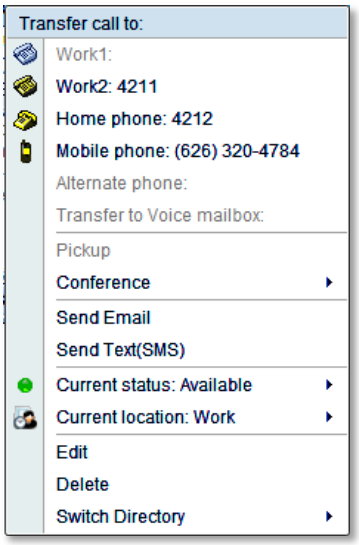
Option 3 **Right click** on the contact and select one of the multiple listed numbers to transfer.

To Set Up Conference

Option 1 **Drag** the contact to an existing call in the Call window, on answer, click on Conference Complete.

Option 2 Right click on the contact and select Conference and then the contact's number from the sub-menu.

To Change Status



Option 1 To **change Availability** status, right-click on the contact and **select Current Status** from the menu. Then select the new status from the sub-menu. You can also change the status from the Action Bar.

Option 2 To **change Location**, right-click on the contact and **select Current Location** from the menu. Then select the new location from the sub-menu. You can also change the location from the Action Bar.

Option 3 To change away message, click on the Availability tab in the Action Bar and enter the new message.

To Send Messages

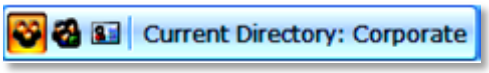
Step 1 Right-click on the directory contact and click on the desired messaging option or press the shortcut key to send the message.

Step 2 You can also send messages from the Action Bar. Select the contact, enter the message in the text box and click on send.

Notes

1. Message delivery methods: Email, SMS, (Instant Message, IP phone text message – future)
2. In order to send a message, the contact must be a CallConnector user and the delivery address must be configured in the directory.
3. To send email and SMS messages, the email profile must be setup correctly.

Selected Another Directory



Step 1 **Click on the button for the directory** in the toolbar. The Current Directory will display the name of displayed directory.

Step 2 **Click on View** in the menu and select the directory to display.

Add, Edit or Delete Contact Information

Step 1 To add a new contact, click on **Add Contact** button in the toolbar or press CTRL+N. A blank New Contact window is displayed. You can also right-click on the Directory Menu and select New. Enter the information for each of the desired fields and click on **Save**. Then click Refresh.

Step 2 To edit a contact, select the entry that you wish to update and click on the **Edit button** or press CRTL+E. The Edit Contact window is open. You can also right-click on the Directory Menu and select Edit. Make changes to the entry and click on Save.

Step 3 To delete a contact, elect and entry that you wish to delete and click on **Delete button**. You can also right-click on the Directory Menu and select Delete.

7 Using the Action Bar

The Action Bar information is displayed in tabbed sections. All action functions are mouse and keyboard accessible.

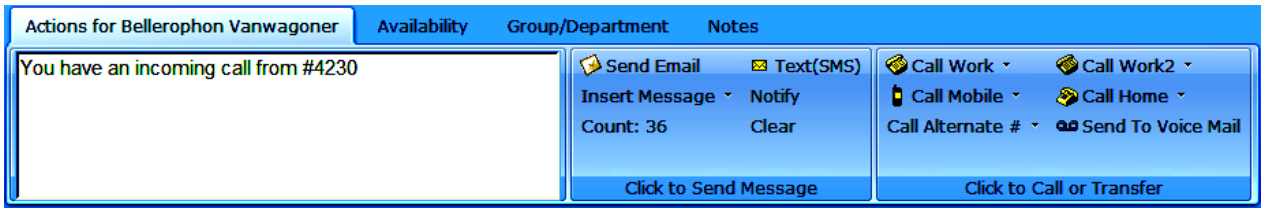


Figure 5 Action Bar with Tabbed section for Actions, Availability, Group and Notes

Tab	Description
Actions	Provides interface for sending messages (instant messages, emails and text messages) and handling calls (dialing or transferring to contact's alternate numbers).
Availability	Allows the operator to change an employee's status (availability, location and away message) and call forward settings. (Corporate directory only)
Group	Provides the ability to make calls or send instant messages to the available group members or the contact's manager, backup and assistant. (Corporate directory only)
Notes	Lets the Operator view and change the current notes. (Corporate directory only)

Table 2 Action Bar Sections

To Send Messages

Step 1 Select the directory contact.

Step 2 On the Actions tab of the Action Bar, enter the message text or insert a stored message and click on the desired message button or press the shortcut key to send the message.

Step 3 You can also send instant messages to the contact's associates or group members by clicking the IM button next to the associates or group members on the Group tab.

Step 4 Click on IM Available on the Group tab to send instant messages to the first available group member.

To Make a Call

Option 1 Click on the phone number in the Action bar. The number will be dialed.

Option 2 On the Group tab, click Call button next to the contact's associate.

Option 3 Click Call Available on the Group tab to call the first available group member or select a group member and click Call to call the selected group member.

Option 4 Drag a group member from the Group tab to a line on the Call window to call the selected person.

To Transfer a Call

Option 1 Click on the arrow key next to the contact's alternate number on the Actions tab and select Transfer.

Option 2 On the Group tab, click Call next to the contact's associate to transfer the connected call to that person.

Option 3 Click Call Available on the Group tab to transfer a call to the first available group member or select a group member and click Call to transfer a call to the selected group member.

Option 4 Drag a group member from the Group tab to the connected call on the Call Control window to transfer the call to the selected person.

To Change Status and Call Forward Settings

Step 1 Select a directory contact and click on the Availability tab.

Step 1 For Status, Location, and Preferred Number, selects the appropriate entry on the list of items. For other fields, enter the information you want to update in the appropriate field.

Step 2 Click Update to save the changes. Click Refresh to see the updated information.

8 Sending Instant Messages

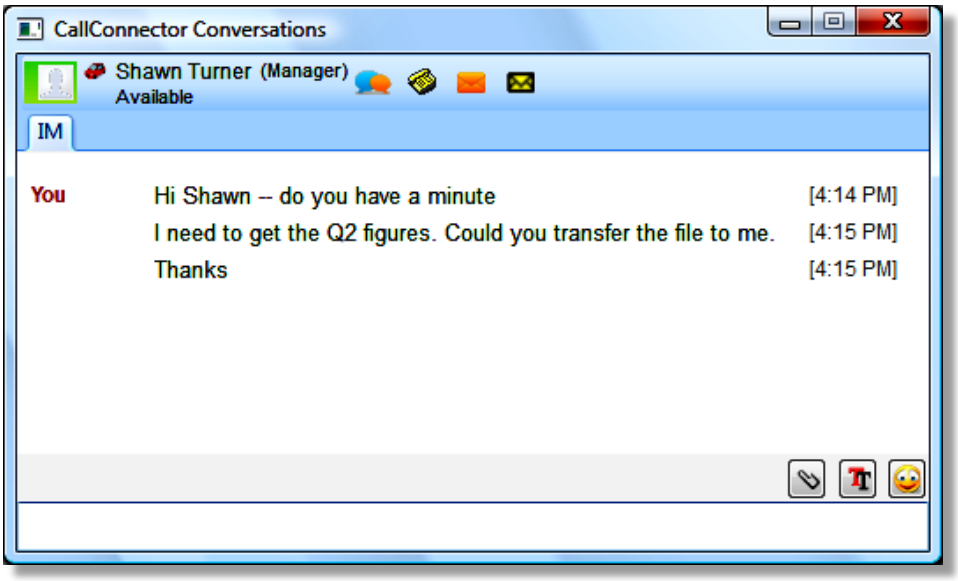


Figure 6 VoiceView Right-Click and Action Menus

To Send an IM Message

Step 1. Select the contact in the directory. Enter the text message in the Action bar and click on Instant Message button. The CallConnector Conversation window will open displaying the text.

Step 2. Click on the contact in the Directory window and select the Send Instant Message option. This option is available for contacts with IM address The CallConnector Conversations window will open

Step 3. Click in the message entry field at the bottom of the conversation window. Type in your message and press enter to send to message.

To Send an Emoticon

Step 1. Enter the message text, and then click on the Emoticon button for a list of the available icons.

Step 2. You can type the text representation of the emoticon. Standard icon representations are converted into images by the recipient IM client.

To Transfer a File

Step 1. Click on the Send File button in the IM window. The File browser window will display to allow you to select the file to send.

Step 2. Select the file that you want to send and click OK.

Step 3. The File Transfer request is sent to the correspondent party. They will have to accept the file transfer.

To Accept a File Transfer

Step 1. You will receive a system message with the name of the file that your IM partner is sending to you.

Step 2. If you wish to receive the file, then click on accept, otherwise reject the request.

Step 3. If you accept the file, then specify the location and name for the file.

Step 4. The CallConnector will transfer the file to your specified location.

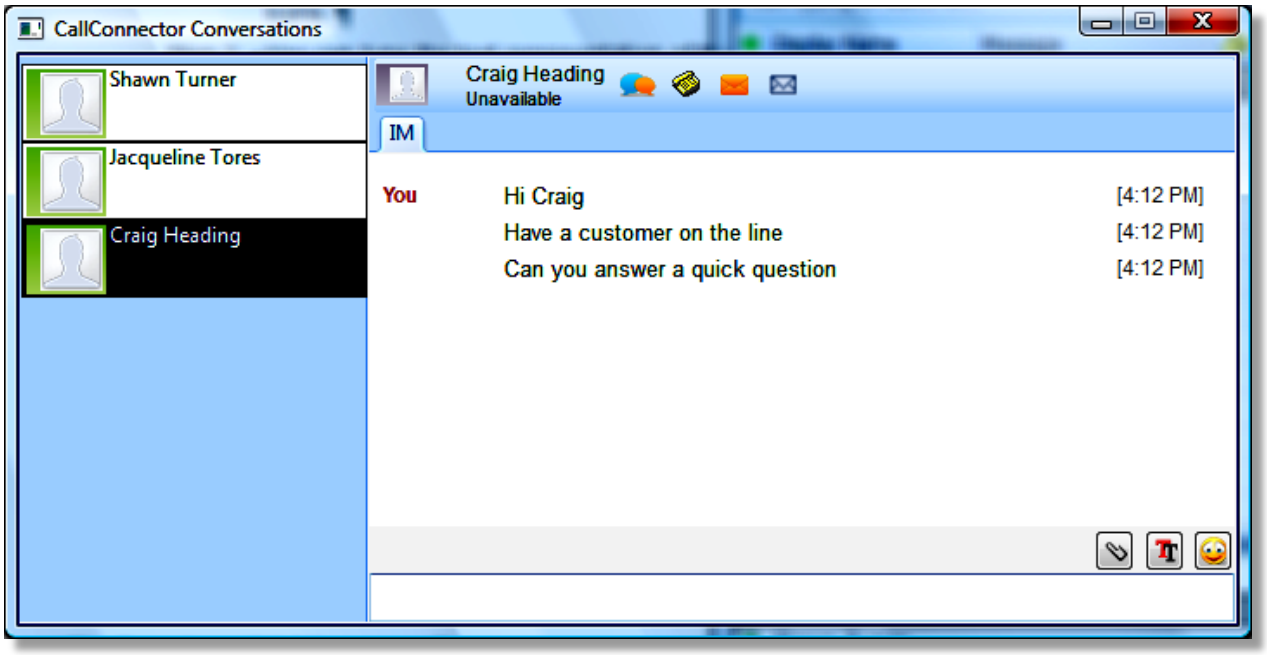


Figure 7 Sending IM Messages to multiple parties

To Switch from One IM Session to Another

Step 1. You can start multiple IM sessions. Each session is displayed in a tab in the IM Conversations window. The currently active conversation is highlighted.

Step 2. To switch to another IM session, click on that name in the session selection window. You will now view the IM messages from that party.

9 Changing Preferences

The Preferences Window allows the operator to customize the application and setup their preferences.

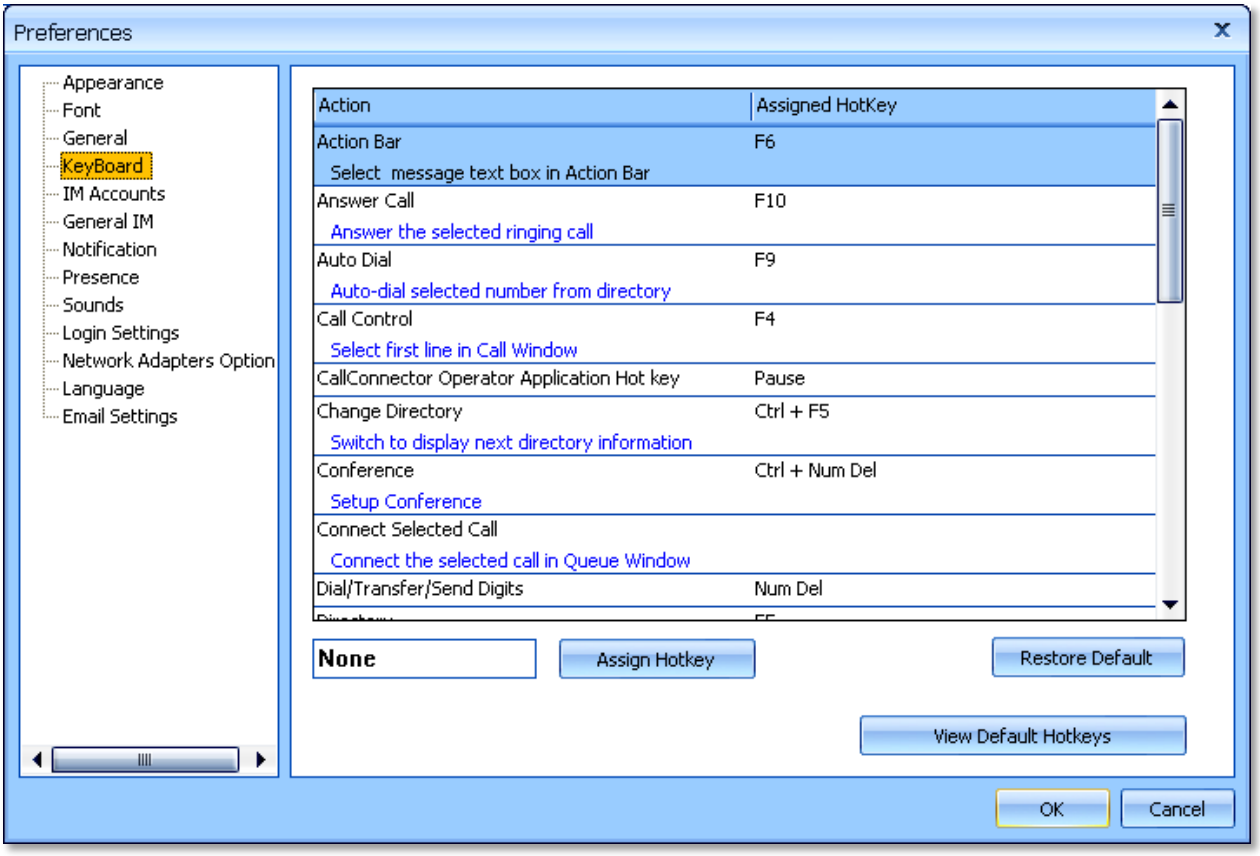


Figure 8 Preferences Window

10 Additional Information

For more information about Cisco Smart CallConnector Operator, see the Cisco Smart CallConnector Operator User Guide.

Cisco Systems has more than 200 offices in the following countries. Addresses, phone numbers, and fax numbers are listed on the

Cisco Website at www.cisco.com/go/offices

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