

Call Monitor PLATAN

**Installation and configuration
manual**

ver. 1.00.01

*Proxima IP PBX Server, Libra PBX Server
as well as PLATAN ProximaWeb, LibraWeb,
PLATAN Call Monitor, PLATAN CTI
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1. Introduction

1.1. Using Platan Call Monitor software

Platan Call Monitor software is dedicated for users (agents) answering calls in groups and for people supervising their work (managers). It gives the operators updated information about group calls being answered, waiting in queue and missed so that they could be called back. For managers it provides current statistics of agents' work.

The software consists of Platan Call Monitor Server and three types of licences:

- min. 2 x 1,6 GHz dual-core processor,
- 4GB RAM memory,
- 1 GB free space on hard disk,
- LAN 10/100/1000,
- Operating system: Windows 8 (or later) or Linux,
- Mozilla Firefox or Chrome web browser,
- Free Platan Click2Call add-on (option) to facilitate calling back the missed calls.

Platan Call Monitor software supports Proxima, Proxima plus IP PBX Servers and Libra PBX Server (ver. 2.10.02 and higher). The following licences are required:

- Platan Call Monitor starting set (licences on server, 1 Manager and 2 or 10 Agents),
- Additional licences for Manager and/or Agent (optional).

The system configuration and users' access to the software is available by web browser (Firefox ver. 75 or later and Chrome ver. 81 or later).



Note! It is recommended to use Platan Application Server as a workstation for Platan Call Monitor Server.

1.2. Licence agreement

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THIS IS A LEGAL AGREEMENT BETWEEN YOU AND PLATAN sp.z o.o. sp.k. (collectively called "PLATAN") FOR THE USE OF **PLATAN Call Monitor software** ("SOFTWARE") FOR Libra PBX Server or Proxima IP PBX Server ("PRODUCT").

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2. CONTENTS OF THE SOFTWARE

The SOFTWARE is distributed for the purpose of use with the PRODUCT to support and monitor the call answering by groups, according to the acquired number and type of call recording licences. The SOFTWARE licence is assigned to the given PRODUCT and to the computer on which it will be installed. SOFTWARE is distributed with the Licence Confirmation.

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In case of doubts as to the terms of use of the SOFTWARE, the USER should contact PLATAN for additional explanations.

1.3. Software organisation chart

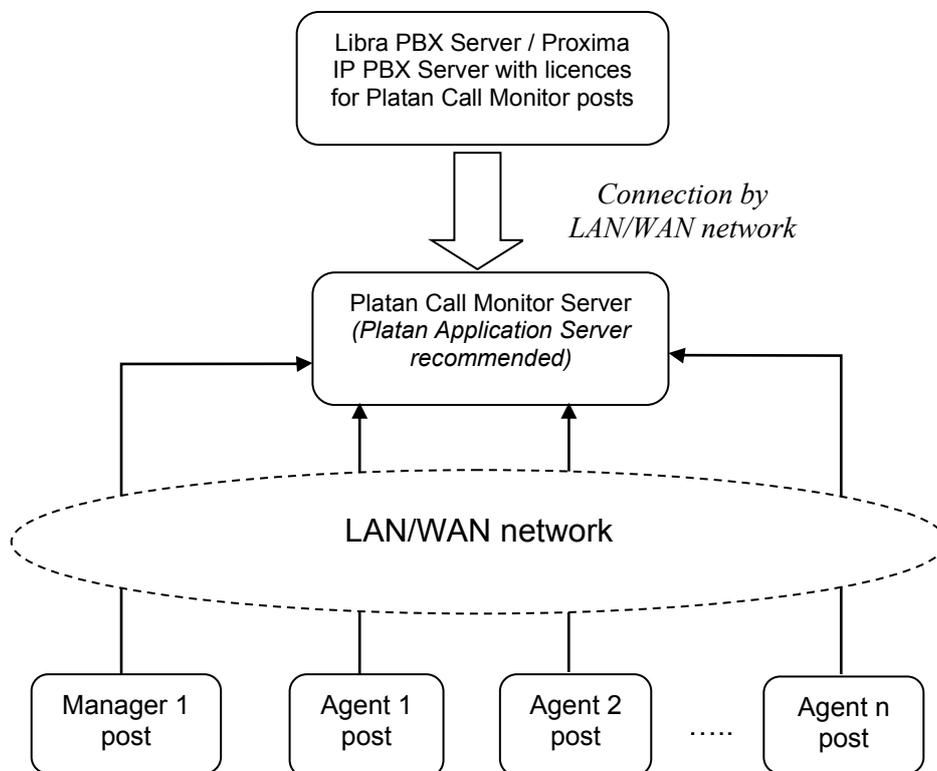


Fig.1 Platan Call Monitor software organisation chart.

1.4. Platan Call Monitor software installation

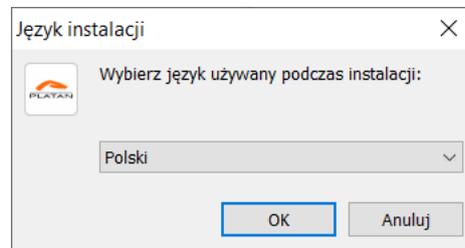
Platan Call Monitor program is to be installed on a computer meeting the requirements specified in chapter 1.2, connected to the local computer network. It is recommended for a server with Platan Call Monitor software to remain turned on all the time and connected to the Libra PBX Server / Proxima IP PBX Server.



The Platan Call Monitor Server installation on the Platan Application Server is highly recommended.

Platan Call Monitor software created to support and monitor calls answered by Hunt Groups in Libra/Proxima PBX Servers is available on our website www.platan.eu in *Offer/Software* menu. In order to install it:

- ⇒ Having downloaded the file from the website, run the *CM_setup.exe* installation program.
- ⇒ Select the installation language:



- ⇒ Proceed according to the instructions of the installation wizard.

2. Platan Call Monitor software configuration

Before starting the Platan Call Monitor software configuration we recommend to complete the Proxima/ Proxima plus or Libra PBX servers configuration. The first connection of the Platan Call Monitor software with already programmed PBX server will facilitate the software configuration as the information about Hunt Groups created and agents assigned to them will be downloaded to the Platan Call Monitor software.

2.1. Accessing the program window

In order to open the program window, enter the IP address of a computer with Platan Call Monitor software installed in the address bar of Firefox or Chrome web browser. The IP address should be followed by a 8082 communication port: `http://<IP address>:8082`

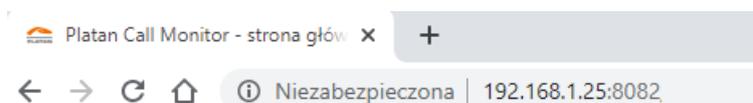


Fig. 2. Entering the Platan Call Monitor server IP address and communication port in the web browser.

After confirmation the software main window appears:

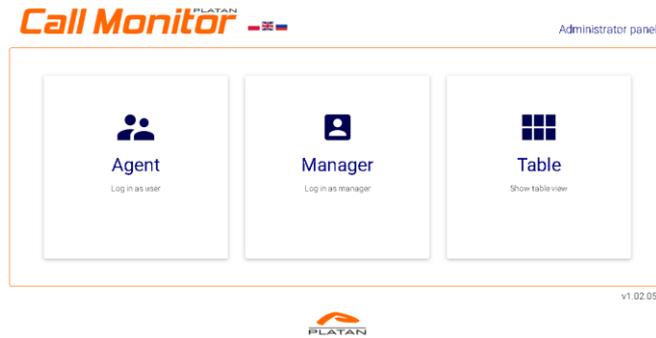


Fig. 3. Main view of Platan Call Monitor

2.2. Administrator panel

In the upper-right corner of the main Platan Call Monitor window enter the *Administrator panel* link:

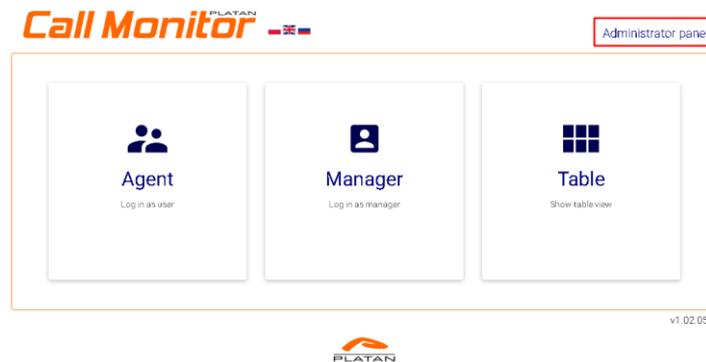


Fig. 4. Access to the Administrator panel.

The default login and password should be changed in *Options* menu after the first logging in.

Login: admin

Password: admin

2.2.1. Status

In *Status* tab you'll find information about:

- Platan Call Monitor server firmware
- MAC address
- Version of PBX Server firmware connected with Platan Call Monitor
- Controller No of PBX Server connected with Platan Call Monitor
- PBX Server connection status
- Licence owner (most often information about PBX Server model and number)
- Number of licences for Agent accounts
- Number of licences for Manager accounts
- Number of licences for Table
- Licence validity.

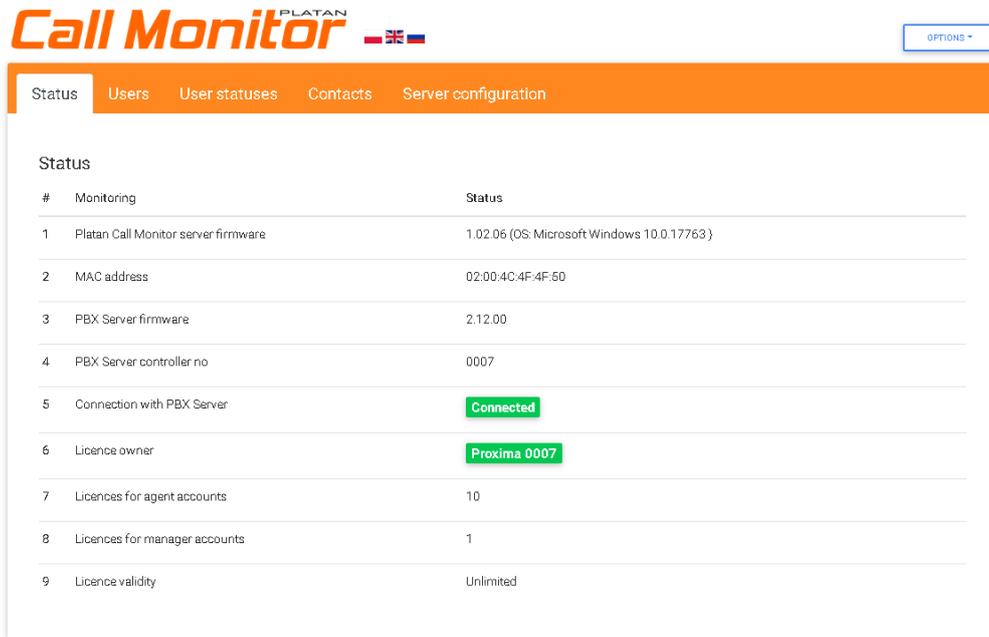


Fig. 5. The view of Status tab in Administration panel.

2.2.2. Server configuration

Platan Call Monitor software communicates with PBX Server on two LAN ports: TCP 5001 and HTTP port that is set in PBX server for communication in *Administration* → *Network* menu. Default HTTP port: 80.

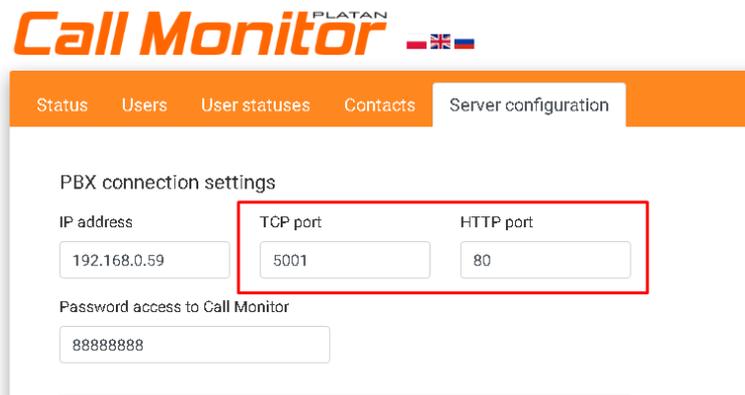


Fig. 6. Server configuration tab in Administration panel.

In order to connect the Platan Call Monitor software with PBX server correctly, the password authorising such connection is required. The password should be set in PBX Server’s menu: *Administration* → *Password change*. The default password that should be changed in the PBX Server is: 88888888.



If Platan CTI software works with Platan PBX Server, the *Share TCP socket* option should be enabled in the Platan CTI Server and the settings for communication with Platan CTI Server should be entered in Platan Call Monitor.

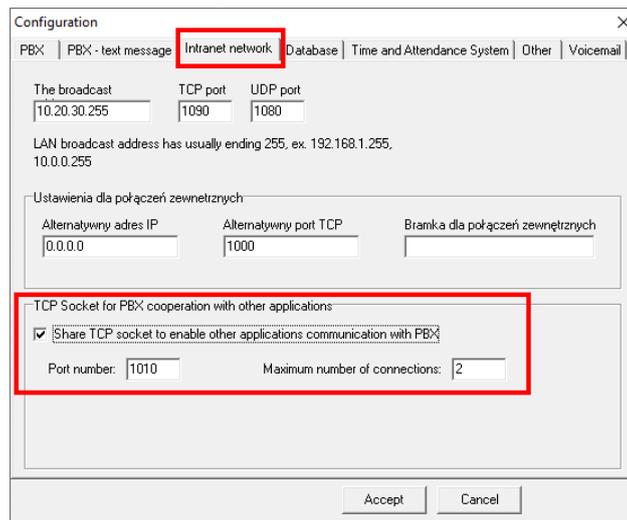


Fig. 7. Enabling Share TCP socket option in Platan CTI Server.

Option *Use Platan CTI server* should be enabled in *Server configuration* tab and the following data should be entered:

- IP address – IP address of a computer with Platan CTI server installed
- Port – TCP port made available in TCP socket.

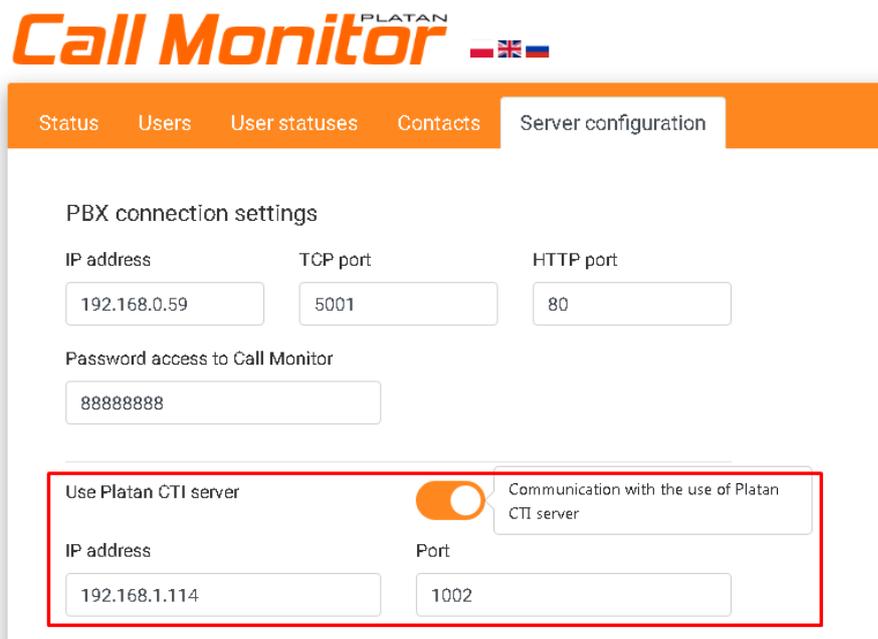


Fig. 8. Enabling communication with the use of Platan CTI server in Server configuration tab..

Additionally, in Platan Call Monitor software it should be defined what prefix the “+” symbol sent by telecom operators in CLIP is to be changed to. The correct value will enable easy calling back with the use of *Platan Click2Call* add-on for Firefox and Chrome web browsers.

The access code to the trunk line in Platan PBX servers should be entered as well – “0” by default.

The screenshot shows the 'Server configuration' tab in the Platan Call Monitor interface. The 'PBX connection settings' section includes fields for IP address (192.168.0.59), TCP port (5001), and HTTP port (80). Below this is a password field for 'Password access to Call Monitor' containing '00000000'. A toggle switch for 'Use Platan CTI server' is currently turned off. Below the toggle are fields for 'IP address' and 'Port'. A red box highlights the 'Dialling' section, which contains two input fields: 'Change "*" prefix into:' with the value '00' and 'Access to the trunk line:' with the value '0'.

Fig. 9. Number dialling settings in Server configuration tab.

In *Server configuration* tab the option *Platan Contacts phonebook* is also available. It will be presented in the manual after its activation in next versions of Platan PBX firmware.

2.2.3. Licence upload

After having connected Platan PBX server with Platan Call Monitor software, the licence file for required number of Agents and Managers should be uploaded. It should be done in: *Options* → *Upload licence*. Select the licence file from the disk and open it.



Fig. 10. Uploading licence file in Options menu.

2.2.4. Users

After having connected Platan Call Monitor software with PBX server, the information about Hunt Groups created in PBX server and extensions assigned to them will be downloaded.

If the data fails to download, check the correctness of Platan Call Monitor connection with Platan PBX server in *Status* tab. Then check if the changes were saved in Platan PBX server and update the list of users and groups in *Users* tab of Platan Call Monitor *Administrator panel*.

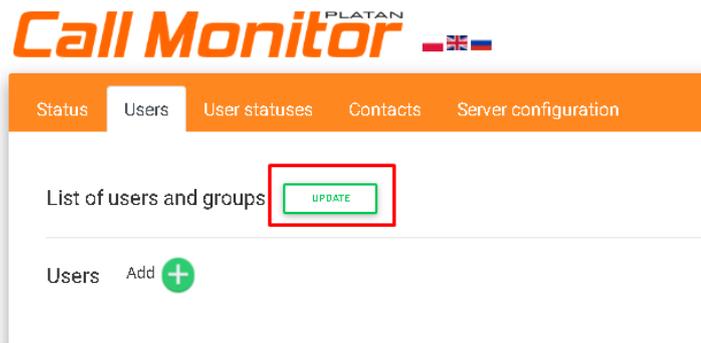


Fig. 11. Updating list of users and Hunt Groups from Platan PBX server.

2.2.5. Creating Agents

After having downloaded the list of users you may start to assign Agents' privileges. Select users from the list or find them with *Search* option. Searching is done by *Number/login* and *Description* columns.

In *Privileges* column assign *Agent* option and then select groups the given Agent is supposed to belong to. Agent can be a member of many groups.

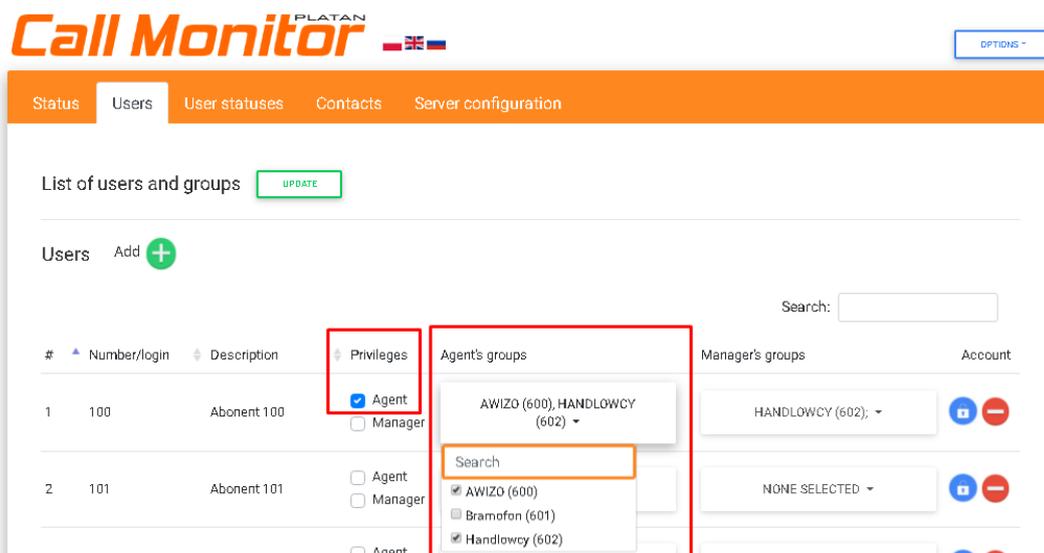


Fig. 12. Assigning privileges and groups to Agents in Users tab.



Users with *Agent* privileges assigned can have *Manager* privileges as well. The required number of Agent and Manager licences is indispensable.

2.2.6. Creating Managers

If *Manager* is not a member of any Hunt Group in the PBX server, it will be not automatically downloaded by Platan Call Monitor software. The *Manager* account should be added manually, with *Add* option:

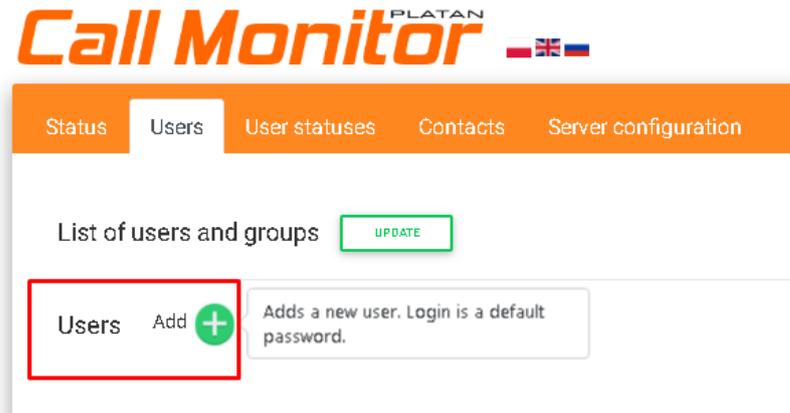


Fig. 13. Adding Manager account manually in Users tab.

At the end of the list a new field to enter user data will appear:



Fig. 14. Manager data edition in Users tab.

Click Save button at the end of the page to save all settings.

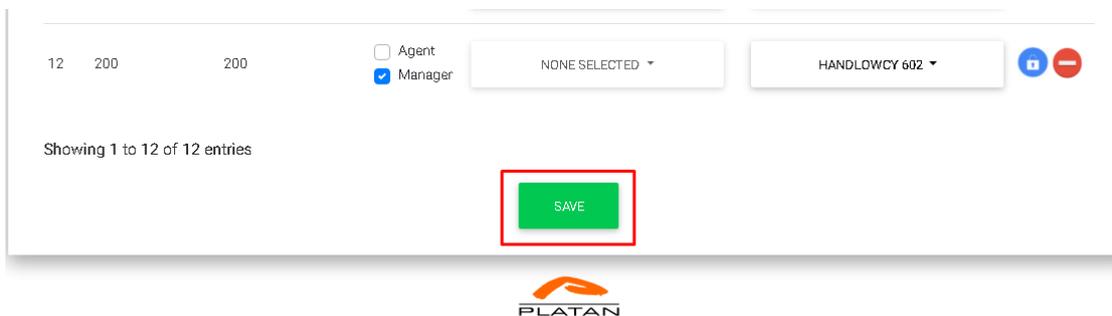


Fig. 15. Saving data entered in Users tab.



The default user passwords are the same as logins. Users should be informed about the necessity of the default password change after the first log in. Password can be changed in *Options*.

2.2.7. Password reset and deleting users

In *Administrator panel* you can reset user password to the default value (login=password). In order to reset password to default, search the user and then click the blue icon with a padlock 

In order to delete user, click the red icon next to the user you want to delete: 

2.2.8. User statuses

In *User statuses* tab there are two statuses of logging in/out the Hunt Groups defined:

- Logged in
- Logged out

Additionally administrator can define three statuses, eg. informing about reasons of temporary logging out, such as:

- Meeting
- Break
- Holiday

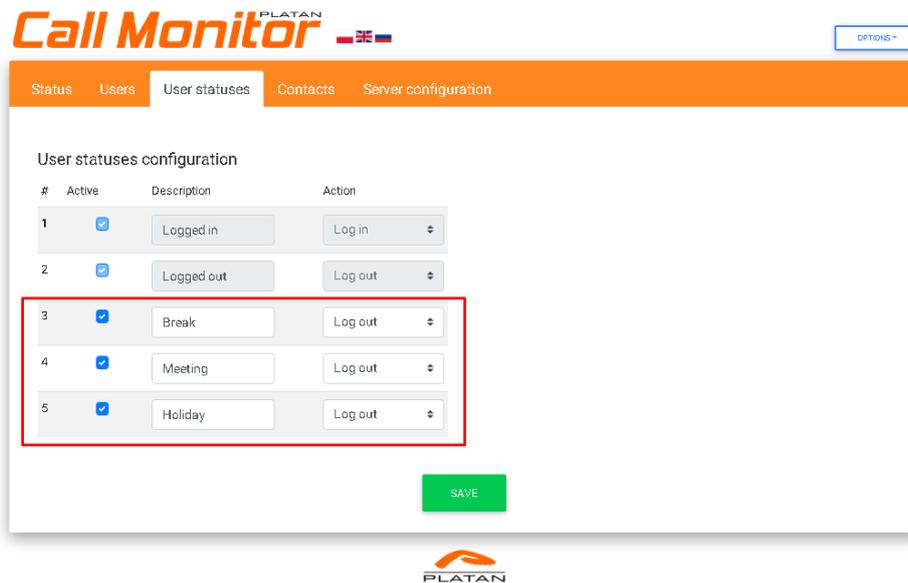


Fig. 16. Defining User statuses and corresponding actions in User statuses tab.

Agents can set these statuses for every group they belong to, logging into this group or logging out of the group.

2.2.9. Contacts

In *Contacts* tab select the source phonebook for the descriptions of incoming call numbers that will be presented in call statistics for Agents and Managers.



Fig. 17. Phonebook selection in Contacts tab.

2.2.10. Options

In Options menu there are the following elements:

- **Log out** – from the *Administrator panel*.
- **Change password** – change password to the *Administrator panel*.
- **Diagnostics** – Platan Call Monitor server operation logs. Platan factory service may ask for them if any incorrect software operation is reported. In the case of any report, the controller No of the Proxima/Libra PBX Server connected to the Platan Call Monitor will be required as well.
- **Upload licence** – uploading file with Platan Call Monitor licence.
- **Server update** – updating the Platan Call Monitor server.
- **Server restart** – restarting the Platan Call Monitor server.
- **Server shutdown** – shutting down the Platan Call Monitor server.



The screenshot displays the Platan Call Monitor web interface. At the top, the logo "Call Monitor" is shown in orange, with "PLATAN" and a small flag icon to its right. Below the logo is a navigation bar with tabs: "Status", "Users", "User statuses", "Phonebook", and "Server configuration". The "Status" tab is active. The main content area shows a table with the following data:

#	Monitoring	Status
1	Platan Call Monitor server firmware	1.02.05 (OS: Linux 3.10.0-693.17.1.el7.x86_64 #1 SMP Thu Jan 25 20:13:58 UTC 2018)
2	MAC address	94:C6:91:19:6E:6A

On the right side of the interface, an "OPTIONS" dropdown menu is open, listing the following actions: "Log out", "Change password", "Diagnostics", "Upload licence", "Server update", "Server restart", and "Server shutdown".