iPECS

CCS Desk Agent

User Manual

ERICSSON | LG

Please read this manual carefully before
operating your set. Retain it for future reference.

Revision History

ISSUE	DATE	DESCRIPTION OF CHANGES
1.3	2012-11-16	Preliminary release
1.4	2013-01-07	Reformatted page footer last page, removed arrows
1.6	2013-01-30	Export Limit Warning, Release
1.8	2014-02-28	Applied new BI

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1. Using CCS Desk Client

1.1 Login

Run the CCS Desk application from the start menu: Start → All Programs → CCS → CCS Desk.
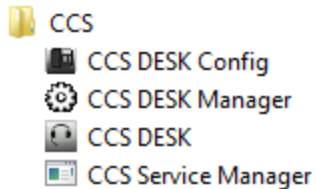
A dialog box will appear prompting the agent to select their name and extension that will be controlled by this agent. The agent also has the opportunity to place themselves on a break at the time of login.
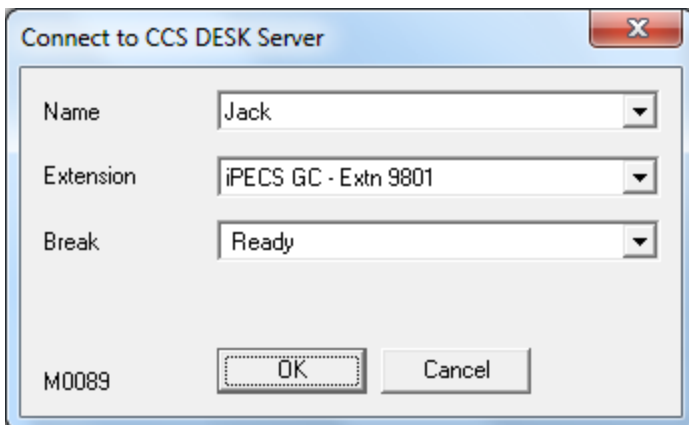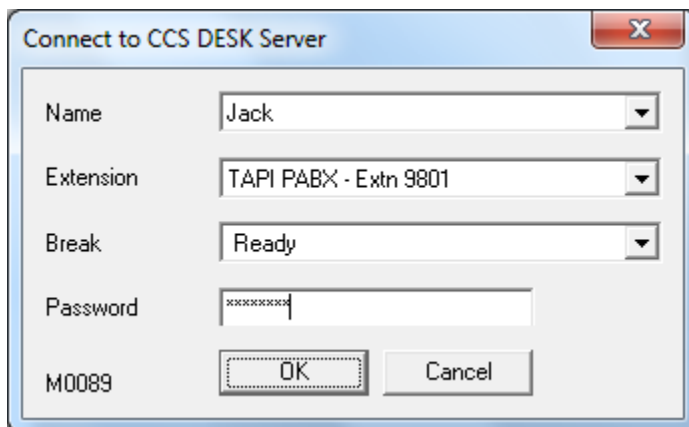
Select 'OK' and the agent will be logged into the CCS Desk application. An icon will appear in the system tray of your windows task bar to show the agent they are logged into CCS Desk.
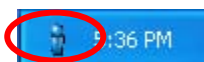
1.1.1   Login with Password
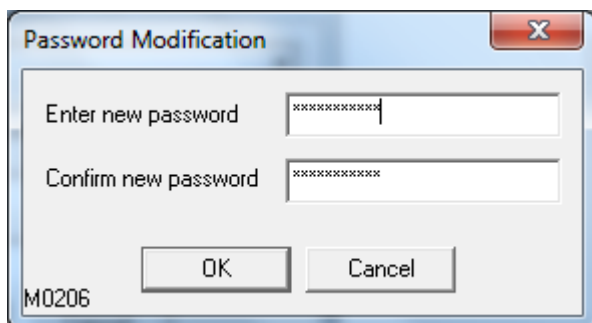
Password may be enforced by the system administrator for added security on the login process. Please consult *CCS Desk Manager – System* section 2.9.32 for more information.

New agents are automatically assigned with 'password' as their default password. This will need to be changed into something else on the agent's first login.

Agent can reset their password from their CCS Desk options.
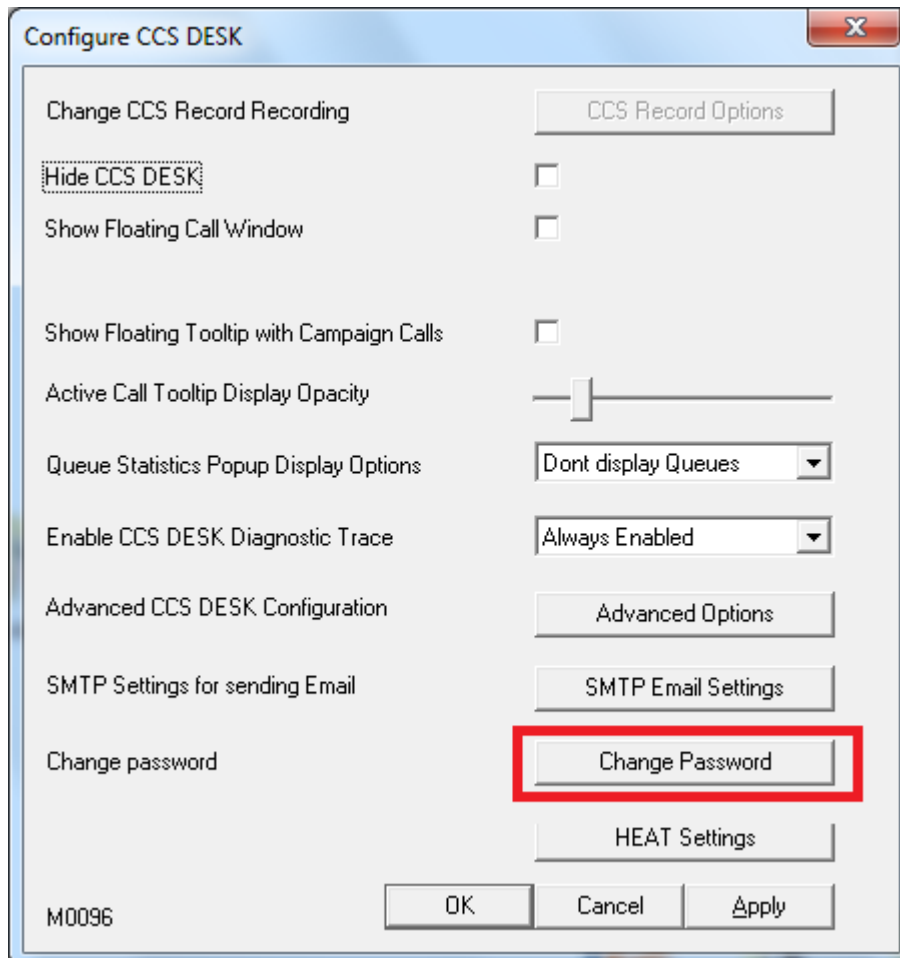
System administrator is able to reset the agents' passwords from CCS Desk Manager. Please consult *CCS Desk Manager – Agents* section 2.9.1 for more information.

1.2   Buttons

Once the login is complete, CCS Desk will be displayed showing the logged in agent name and extension number, and the agent's status. The main row of buttons across the top of the CCS Desk client are used to make each of the 'panels' appear or hide. Each of these panels can be closed by clicking on the 'x' button in the top right of that panel.
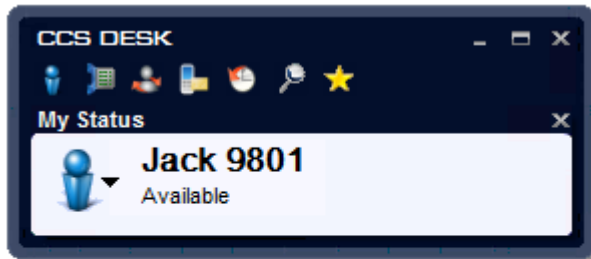
Display 'My Status'

Display 'Active Call'

Display 'Teams'

Display 'CCS SMS'

Display 'History'

Display 'Search'

Display 'Speed Dials'

1.3   My Status

The 'My Status' screen shows the name of the logged in CCS Desk agent, and their extension number. It also displays their current status. This shows when you are available, on a call, on a break. The large icon also changes to reflect the status.
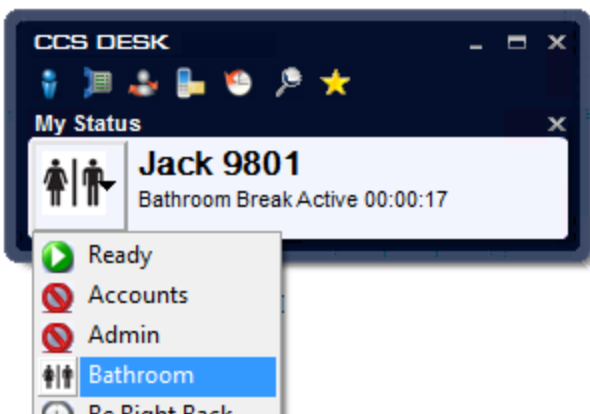
Agent can update their presence by changing their break status on the My Status panel. CCS Desk will also show how long the break status has been activated.

The status change will also be shown on any other CCS Desk and CCS Desk Manager, allowing other people to see your 'presence'. If you are using CCS Desk as part of CCS Q or CCS Call, putting yourself on a break will stop you from receiving calls.

If you are already on a call, you may select a break while on the call; however your status will not change to actually be on that break until you have finished the call.

When you are finished on your break, select 'Ready' which is the top item on the menu.

If your agent is configured in CCS Desk Manager to have an 'Auto Break' you can select this by pressing the hotkey configured in CCS Desk Manager. Please consult the *CCS Desk Manager – Hotkey* section 2.9.3 and *CCS Desk Manager – Agent* section 2.9.1 for more information.

1.4   Active Call

The active call window automatically appears when you are on a call. This is how you can see the information about the call, and control the call.

1.4.1   Answer

When an incoming call is received externally or internally, CCS Desk will be displayed. It also shows the name and company of the person if CCS Desk is integrated to a contact database e.g. MS Outlook or MS Dynamics. When CCS Q system is used, agents will also be able to see the name of the queue for that call.

To answer the call, click on the 'Answer' button.

1.4.2   Hang-up
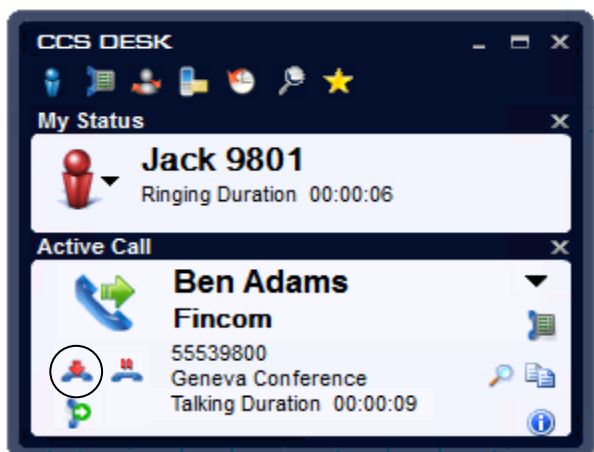
Once the call is answered, to end the call click the 'Hang-up' button

1.4.3 Hold and Unhold
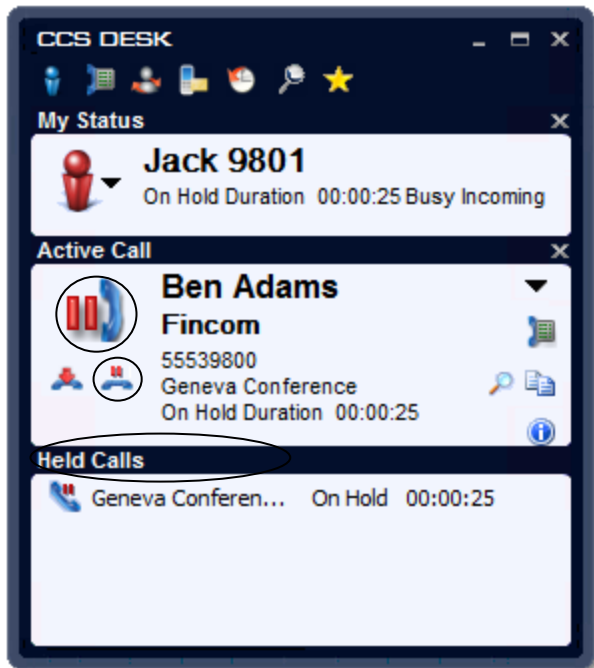
To hold a call, click the 'Hold' button [icon] when there is an active call. Press the same button,

or the bigger button, [icon] or double click on

the Held call [icon] to pick up the call again.

1.4.4 Dial

To dial manually open the Active Call window and click on the Dial button. [icon]
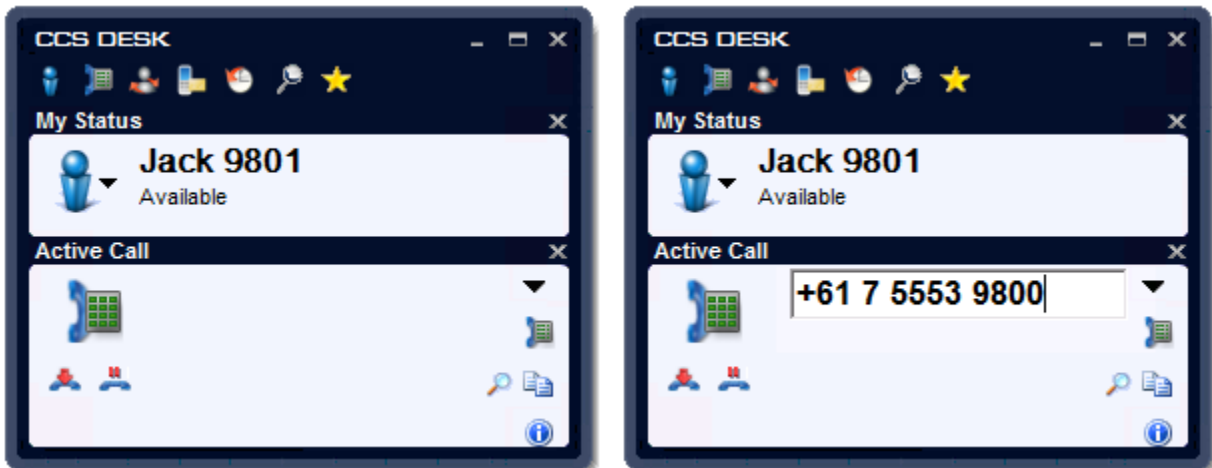
Please note that it is possible for this ability to dial a number manually to be configured as disabled by the CCS Desk Administrator. Please consult *CCS Desk Manager – Agents* Section 2.9.1 for more information

1.4.5 Transfer and Conference
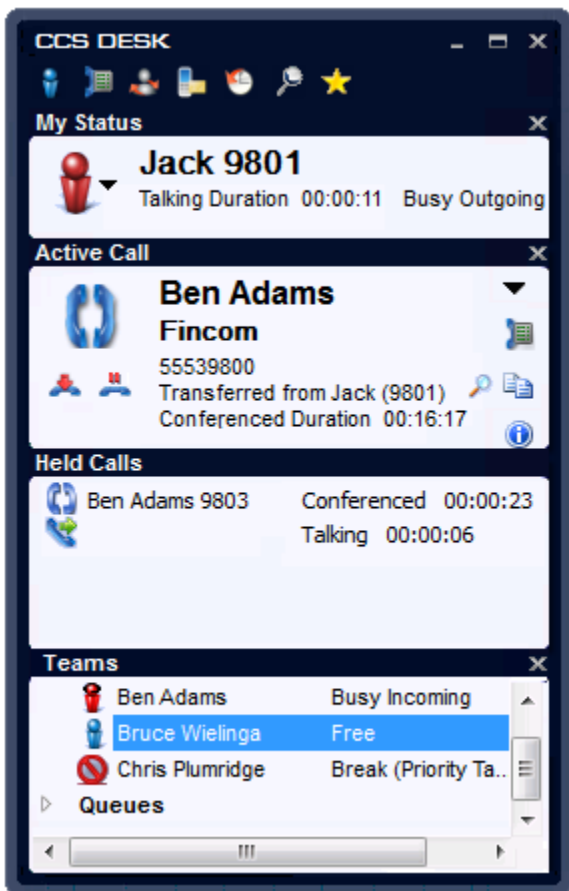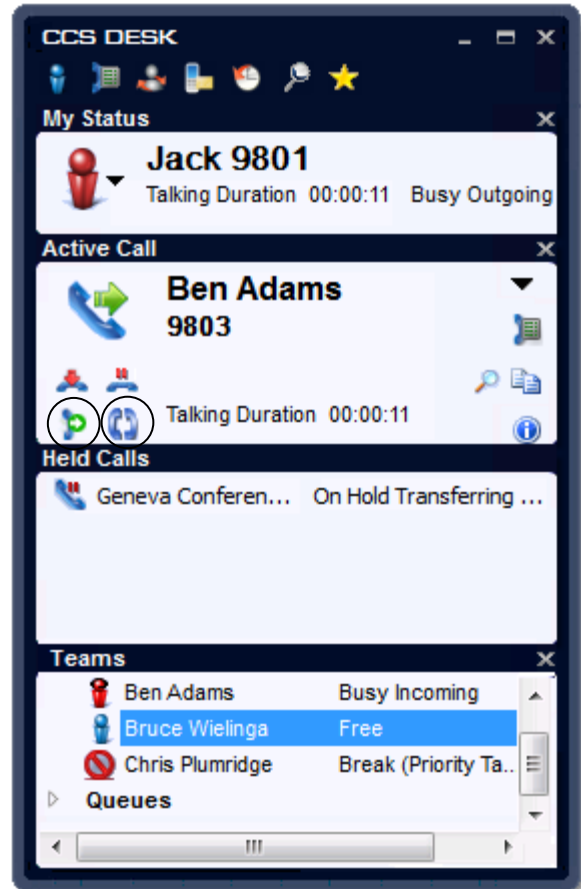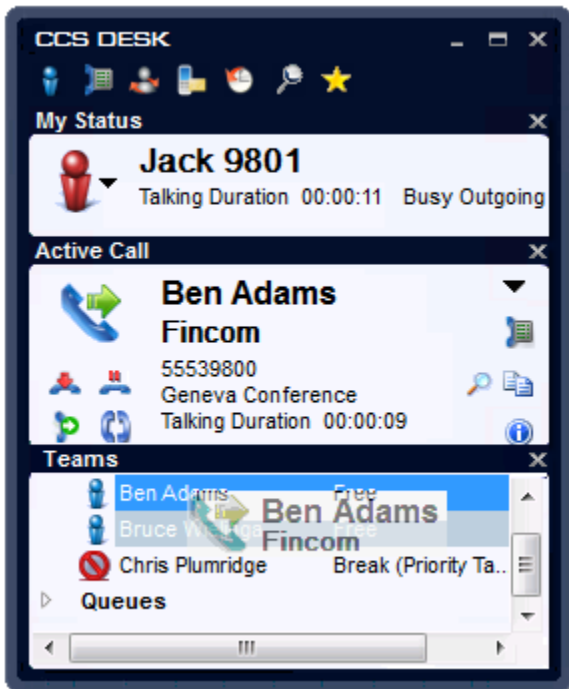
A call can be supervised transferred to a team member by dragging the call in the 'Active Call' screen and dropping it on the team member.

Press the Transfer button to complete it. Press the Conference button to conference the parties.

1.4.6　　　　　Other Call Related Features
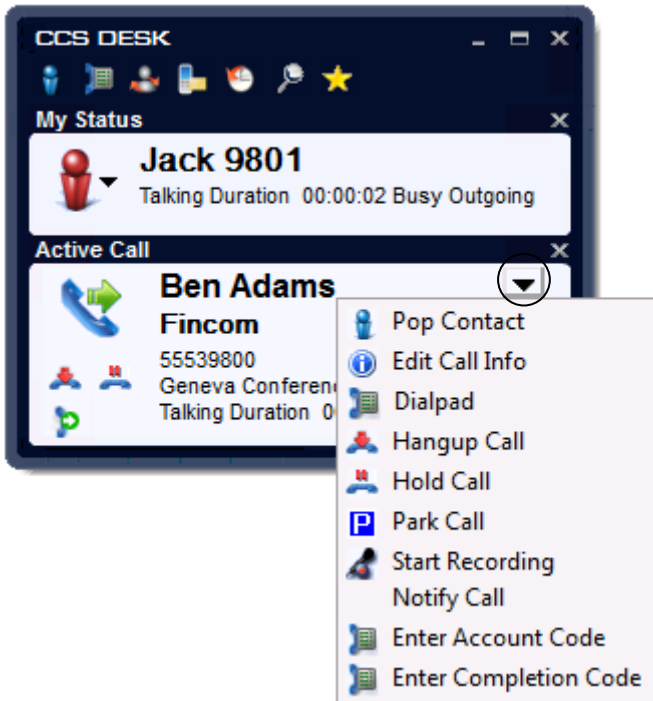
Agent can access the list of CCS Desk functions and telephony controls by clicking on the drop-down arrow at the active window.

Pop Contact – When integrated to CRM application, this option is available to manually open the CRM contact screen.
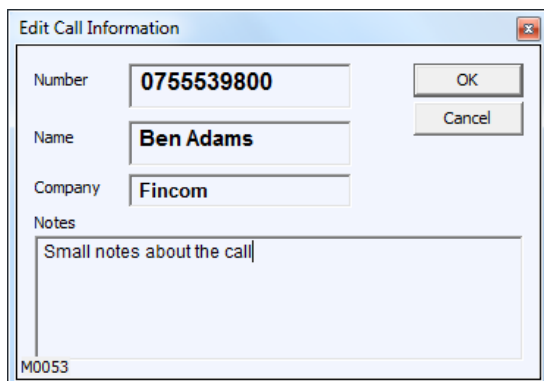
Edit Call Info – Modify the call details name, company and notes information of the call.
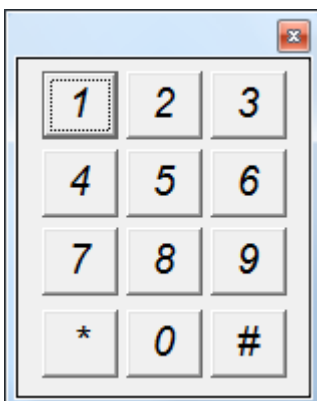
Dial pad – Allows user to send additional digits once the call has connected.

Park Call – Puts the call on the PBX park device.

Notify Call – Sends additional information to the XML Gateway.

Agent can also access the list of recent calls in relation to the phone number by clicking on the magnifying glass icon 🔍 in the active call window.
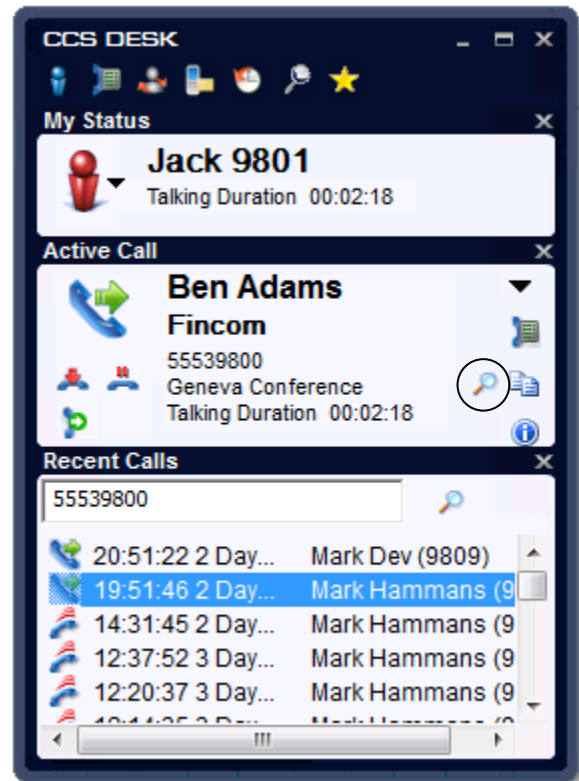
1.5　Team

To view your 'Team' click on the team button. This will list the members of your team, and show their status.

1.5.1　Setup My Team

To manage your team members, right click on Team to enter the setup screen. Use the arrows to move some or all agents to the list on the left. The list of agents shown on the left will be your team members. To remove, return them to the list on the right.
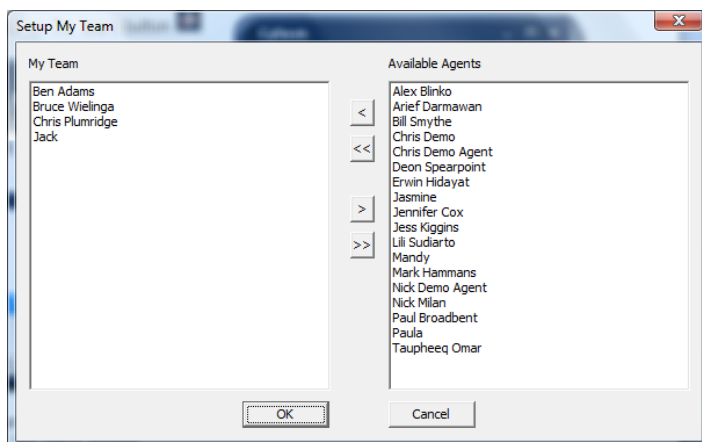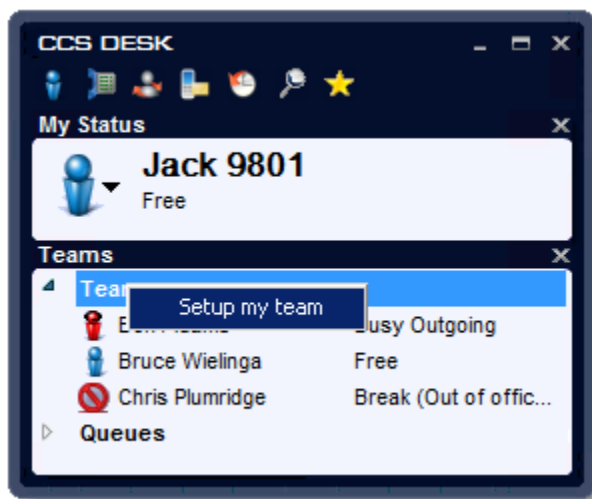
1.5.2 Team Features

Any available team member can be called by double clicking on them.
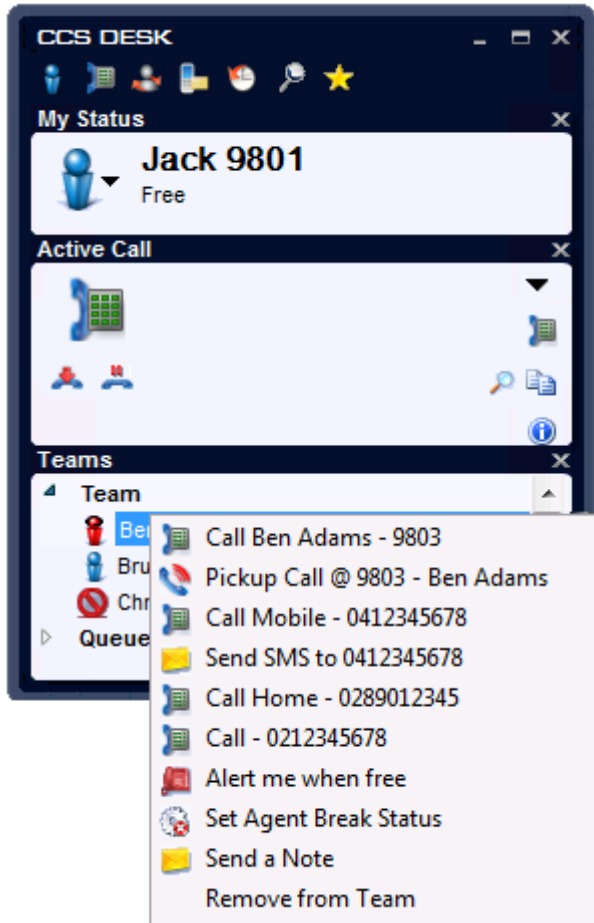
Right click on a team member to access the teams menu. Agent can call different numbers associated with the agent, pick-up the call at the extension or leave a camp-on alert to notify when someone becomes available. Supervisor or Administrator agent will also have the option to Silent Monitor an agent's conversation.

A supervisor / administrator agent is also able to set another agent's Break status and Send a Note for simple messaging.
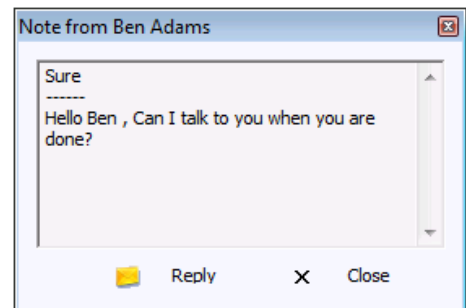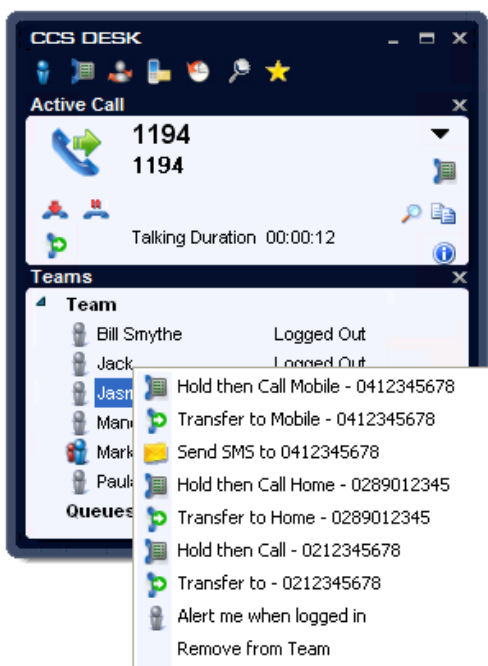
There are various options available when you right click on a CCS Desk agent while you are on a call.
'Hold then call' is a supervised / consultation transfer, while the 'Transfer to' performs a blind transfer.

1.5.3 Transfer to another Queue

The 'Teams' window also shows you all the queues in the system that you are configured to see. This only applies if you are using CCS Q. The main purpose of this is to allow you to drag an active call and drop it onto a queue, to send the call to that queue.
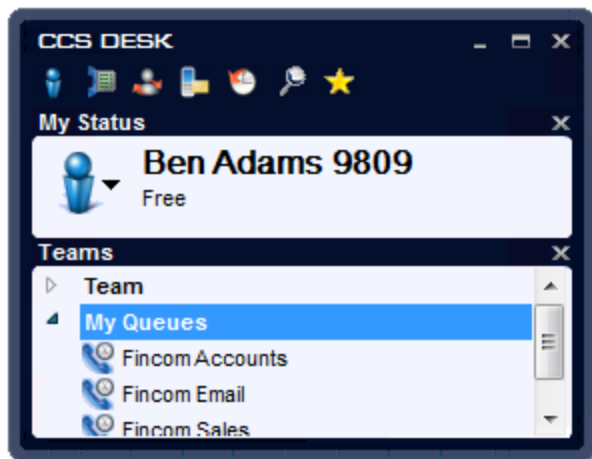
To manage your queues, right click on Queues / My Queues to enter the setup screen. Use the arrows to move some or all queues to the list on the left. The list of agents shown on the left will be your team members. To remove, return them to the list on the right.
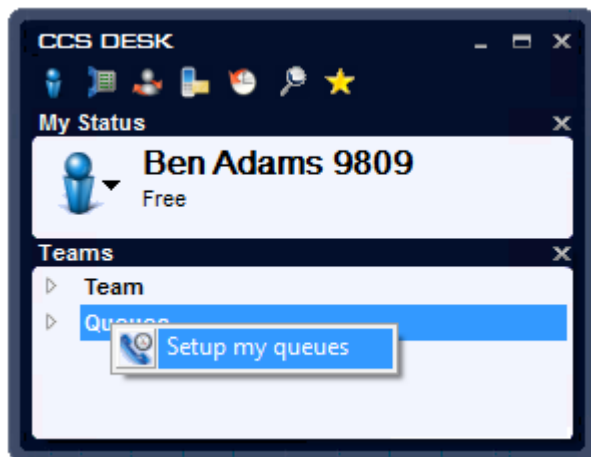
1.6   CCS SMS

When your CCS Desk system is configured to send SMS messages via the CCS SMS Service, you will be able to type a message in CCS Desk and send it to a mobile from there.
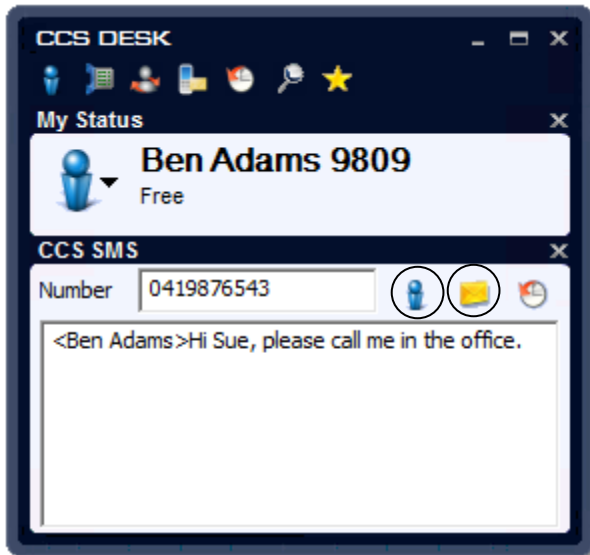
Clicking on the 'my name' button will add your name to the start of the message. Then simply click the 'send' button and the message will be sent. The history of your sent and received CCS SMS messages is available in the 'History' screen.

1.7   History

The history of missed calls, incoming calls, outgoing calls, voice recordings and sent and received SMS messages is available by clicking on the history icon.

Click on the drop arrow to display the history items available. Note that voice recordings are only populated when using CCS Record agent profile, and sent / received SMS messages are only available when using CCS SMS.
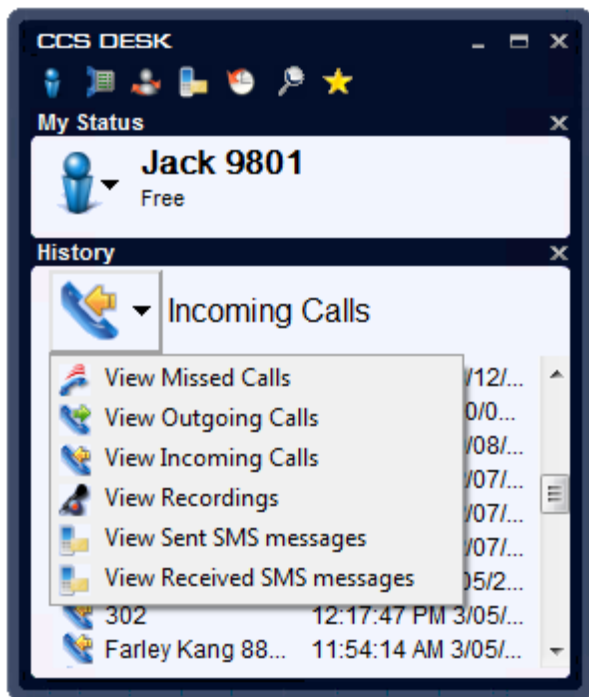
1.7.1 Missed / Incoming / Outgoing Calls

CCS Desk maintains a history of the last 50 records in each category. From within the missed / incoming / outgoing category, you can call them back by double clicking on the item.
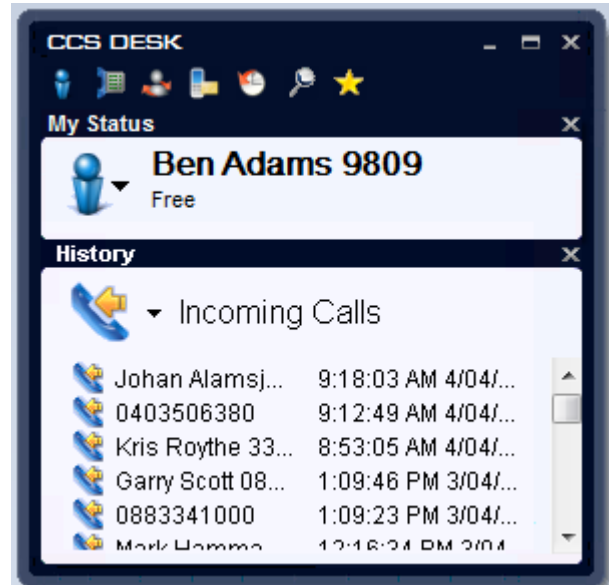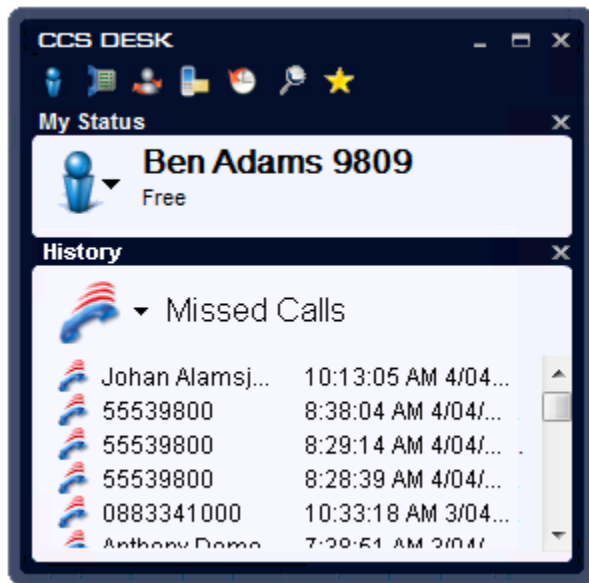
1.7.2   Recording

This shows a list of the last 50 conversations that have been recorded, showing the phone number and the date and time.

1.7.3 SMS

Whenever you send or receive an SMS from the CCS SMS screen, the details of that message are saved in your history up to the last 50 messages you have sent.

If you double click on the message, it will be displayed as it was sent, allowing you to re-send the message if necessary.
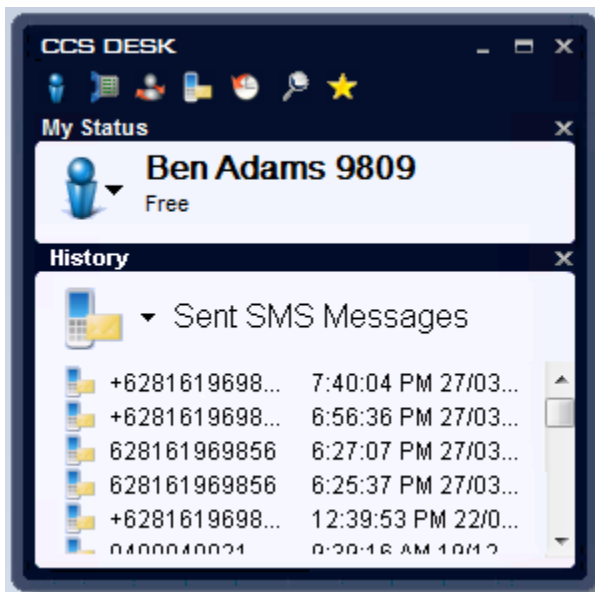
1.8 Search

The 'Search' screen allows you to find other CCS Desk users who may or may not be in your team. It lets you view their status, as well as call them, transfer calls to them, add them to your 'team'.
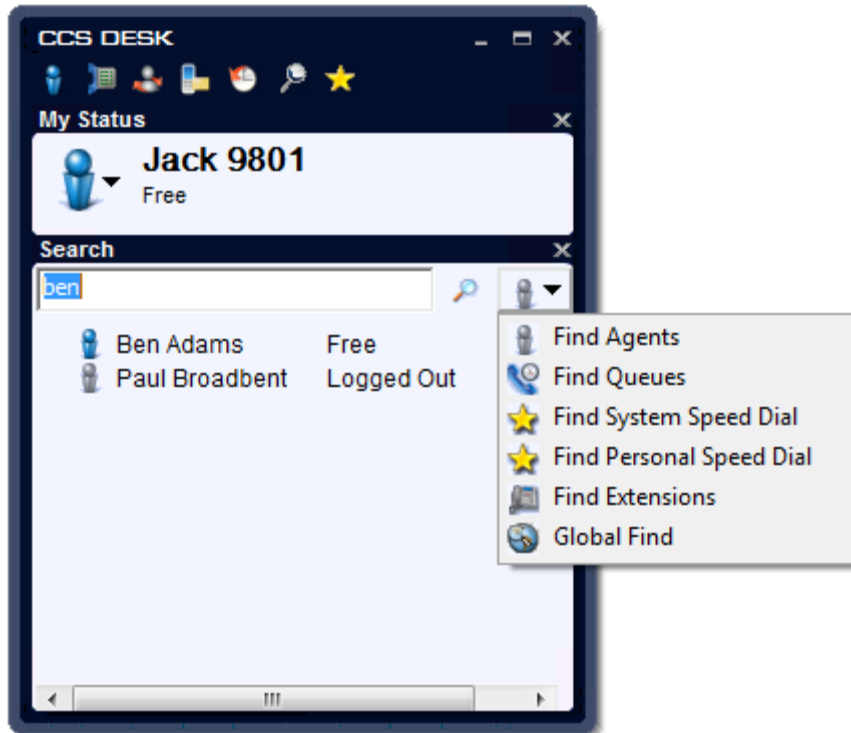
Click on the 'Search' button in the tool bar.

By clicking on the drop down menu, you may choose to look for agents, queues, system speed dials or personal speed dials, or extensions, or use Global Find to search all categories at once.

1.8.1 Search for Agent

There may be many users of your CCS Desk system, and not all of them may be in your 'team'. The 'Search' screen allows you to look them up by name. Type the part of the name that you want to match and click the search button, and a list will be displayed showing the matching agents and their status.
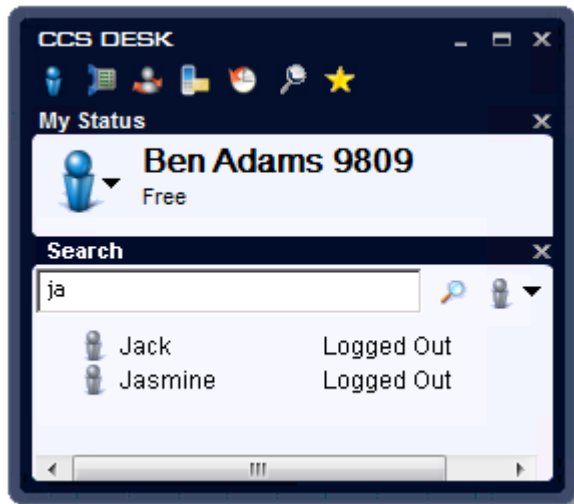
At this point, you may double click on the agent (if they are logged in) to call them. Additionally, you may right click on one of them to get a similar menu to the one you saw in the 'Team' window.

If you are already on a call, you may drag that call to one of the contacts in the search screen.

To add one of the found agents to your 'Team', open the 'Team' window and drag the agent from the 'Search' screen to your 'Team'.

1.8.2 Search for Queue

Select 'Find Queues' from the drop down menu, and you will be able to look for any queues that match the text you have typed.
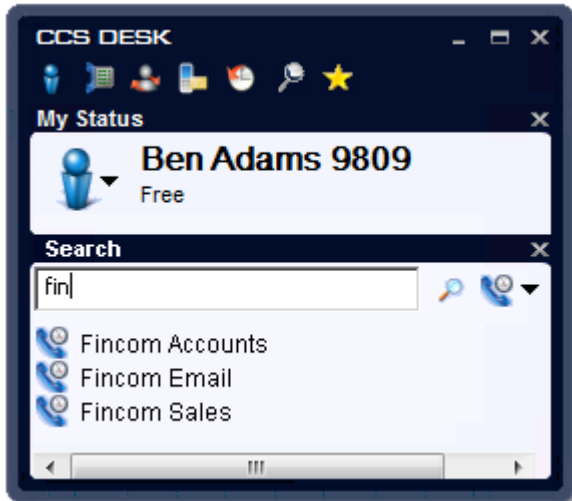
At this point, you will be able to drag any active call and drop it onto the queue in the list to transfer that call.

1.8.3 Search for System Speed Dial

Within CCS Desk Manager the system administrator may create 'System Speed Dials'. Please consult *CCS Desk Manager – System Speed Dials* Section 2.9.2 for more information.

Once you have found the System Speed Dial you require, you may double click to dial. Additionally, if you are already on an active call, you may transfer the call to the System Speed Dial by dragging the call and dropping it on to the System Speed Dial.

1.8.4 Search for Personal Speed Dial

You may also use the Search facility to filter your personal speed dials. From here you can call or transfer to any of your personal speed dials. You cannot add to them or edit them from here.
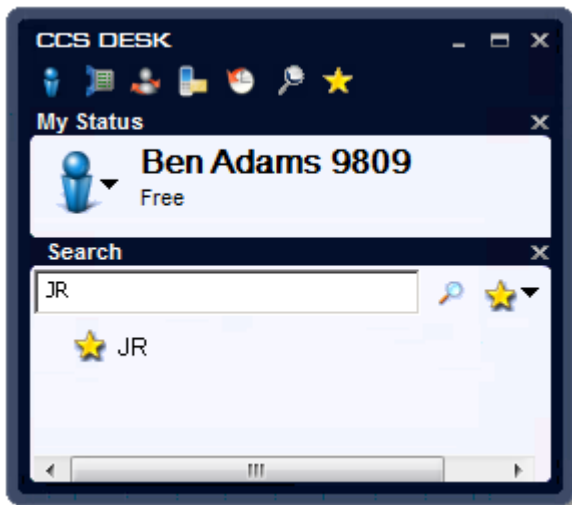
1.8.5 Search for Extension

You may also use the Search facility to look for an extension number that you wish to dial. From here you may call one of these extensions or transfer a call. The icon indicates the status of each extension i.e. red means busy, gray means available.
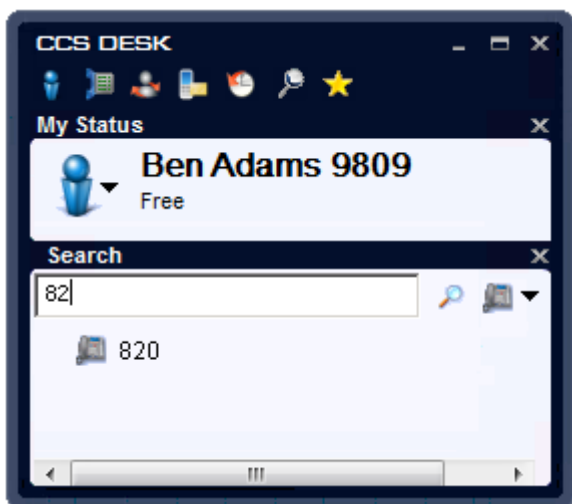
1.8.6   Search for Microsoft Outlook or Microsoft CRM Contact

If CCS Desk is integrated with Microsoft Outlook or Microsoft CRM, you may search by name for a contact. You may right click on any contact and either call them or display their contact record.
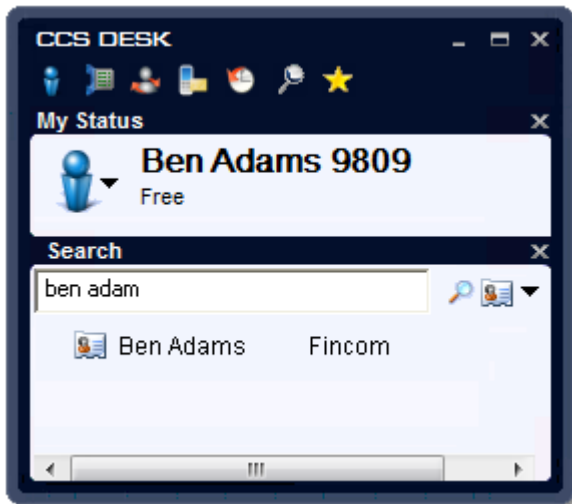
1.9 Personal Speed Dials

You have the ability to program speed dial numbers into the CCS Desk application, from the Speed Dials screen.
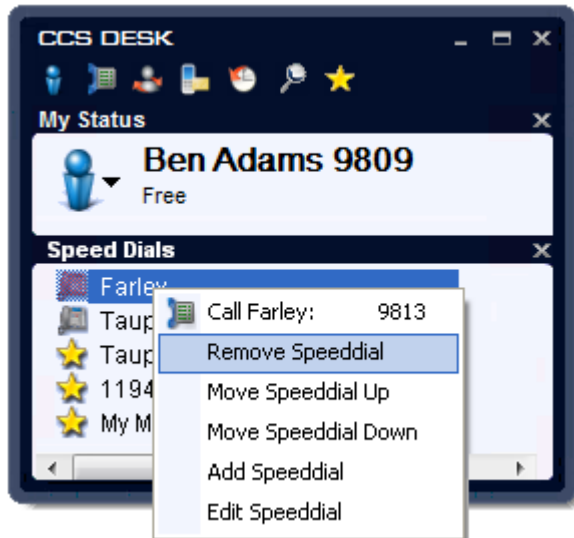
From the context menu you may Add, Remove, Edit and Move the speed dials.

A speed dial consists of just a name and a number.
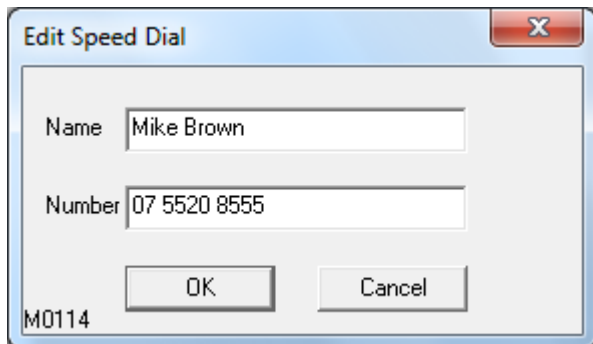
These may be internal or external numbers according to your requirements.

1.10 Conference Room

Conference option is available when the LGE PBX has conference rooms. The red icon means the room is activated, while blue icon means it is deactivated. A password is required to join or deactivate a room. The password is configured during the activation process. Rooms can only be activated / deactivated by a supervisor or administrator agent.
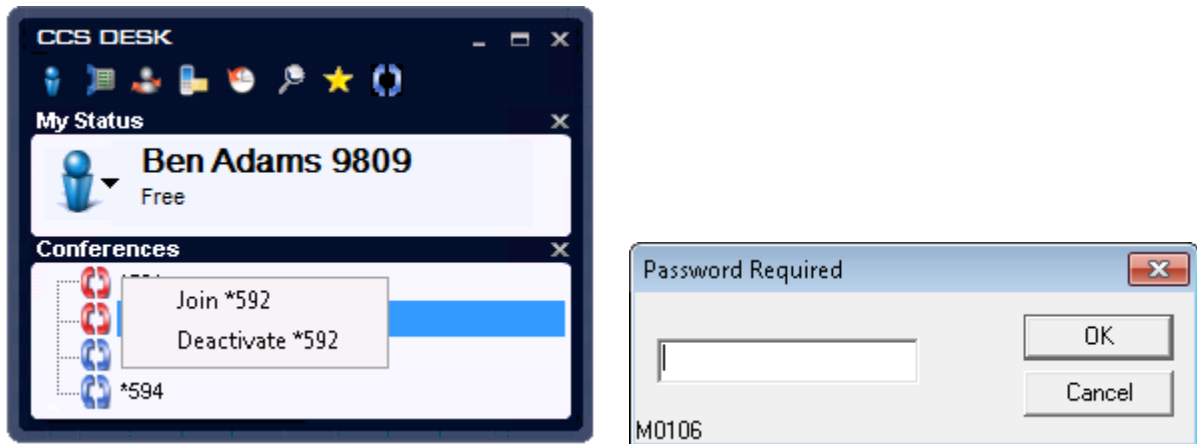
When a conference room is in use, we can view who is in it. A supervisors / administrator agent will have the option to remove them.
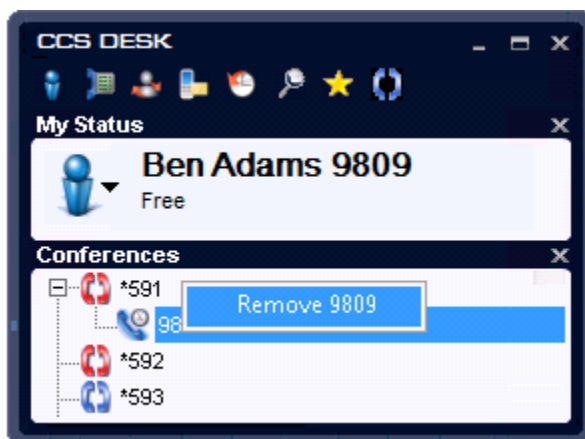
1.11   Call Account Codes

CCS Desk supports the notion of Call Account Codes, which are used to keep track of calls made for an account.

When a call is active, the user can select 'Enter Account Code' from the drop down menu on the Active Call Window.
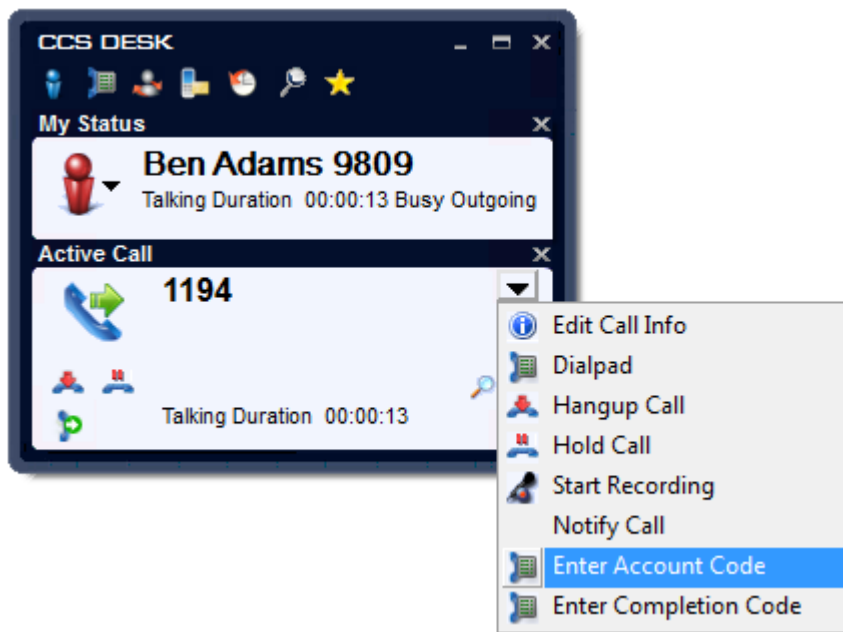
The user will then be prompted to enter an account code, which will be stored against that call in CCS Report.
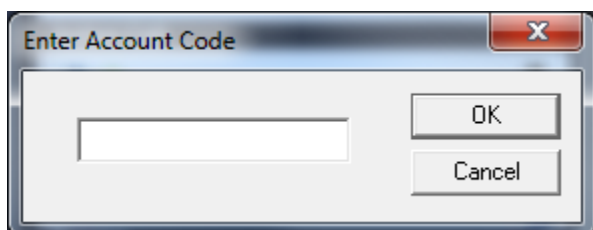
1.12   Call Completion Codes

When a call is active, the user can select 'Enter Completion Code' from the drop down menu on the Active Call Window.
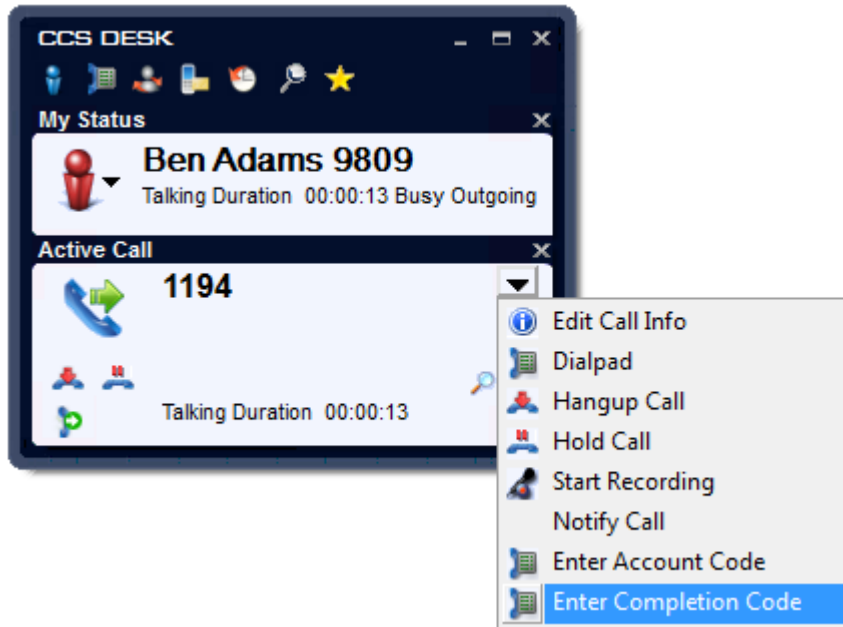
The user will then be prompted to select a completion code, which will be stored against that call in CCS Report.
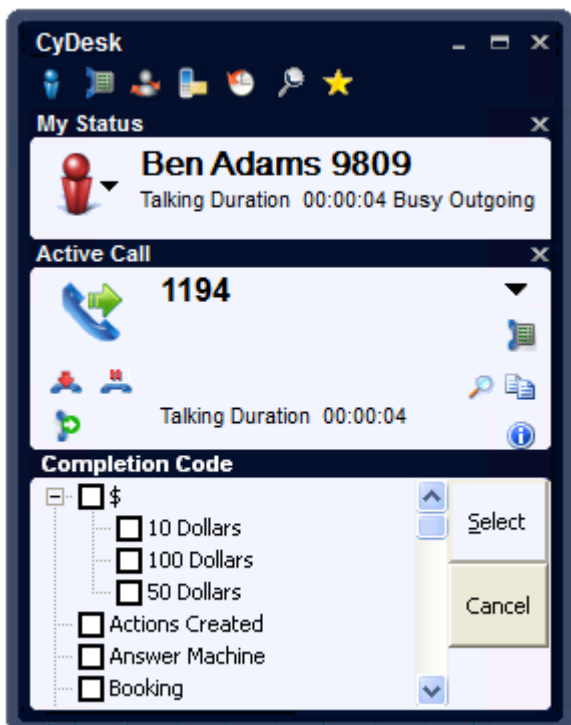
When an agent has answered a call from a queue that requires a completion code to be entered, the agent will not receive another call until they do enter a code. If the agent has finished the call, but has not yet entered a code, the status on the real-time display will show as 'Entering Code' and how long their status has been like that.

1.12.1 Automatic Call Completion Codes

CCS Desk can be configured to automatically display the Call Completion Codes window. This is done in the 'Advanced Options' of 'CCS Desk Options', as shown below.
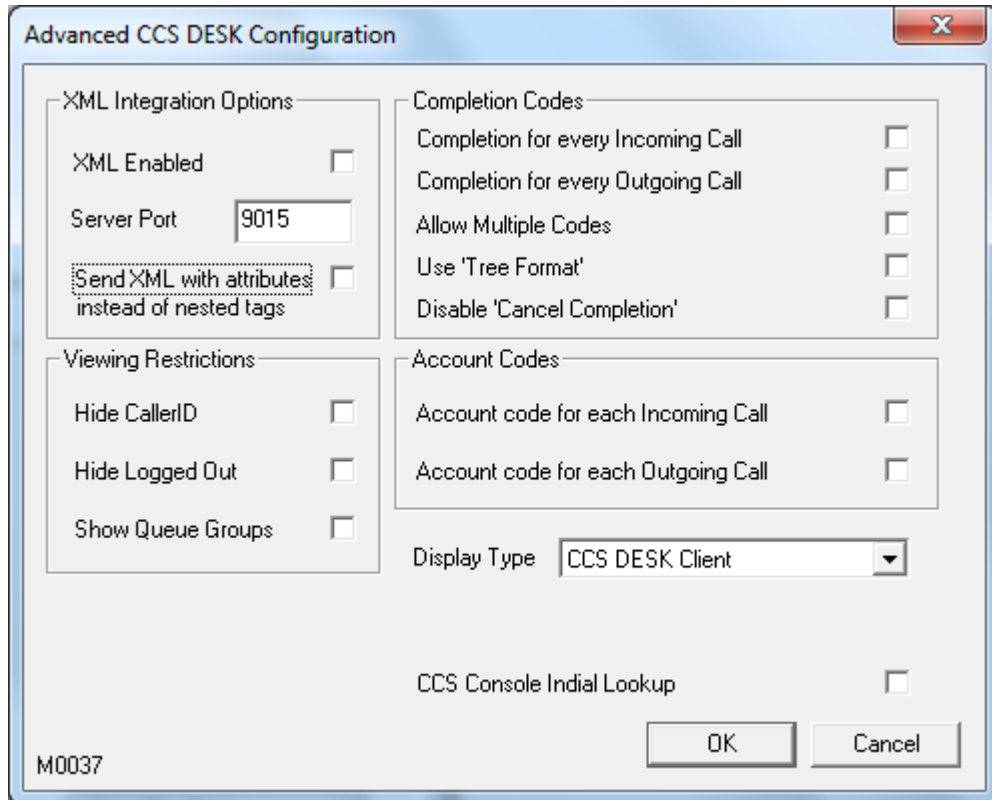
Completion for every Incoming Call – Every time an incoming call is answered the Completion Code selection panel will be displayed

Completion for every Outgoing Call - Every time an outgoing call is Ringing or Answered the Completion Code selection panel will be displayed

Allow Multiple Codes – The Completion Code selection panel will allow multiple codes to be selected by using check boxes

Use 'Tree Format' – If codes exist which have a '–' in the name, they will be displayed in a tree format.

1.13   CCS Desk Options

To access the CCS Desk options that can be customised, right click on the CCS Desk title and select Configure.
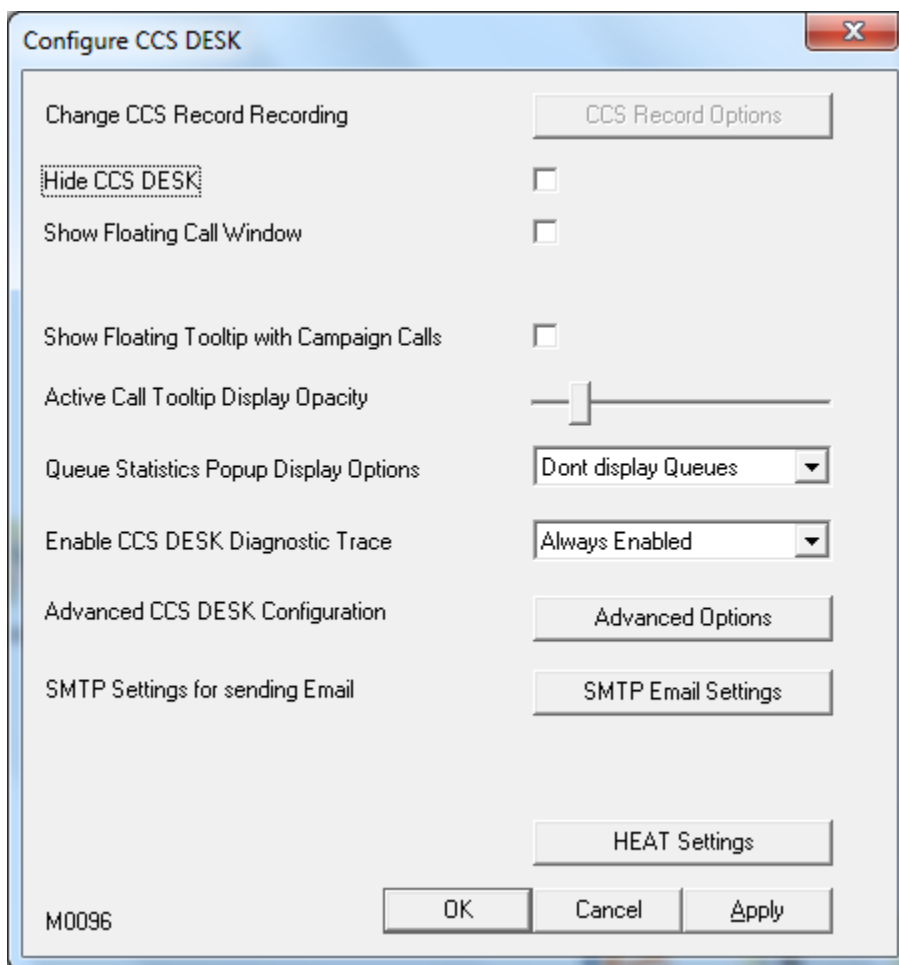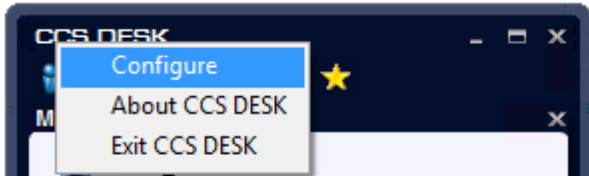
Change CCS Record Recording Options – This is used to change the settings for the CCS Record feature. This is is enabled only when the agent is assigned to a CCS Record profile that does not override local settings. Please consult *CCS Desk Manager – CCS Record* Section 2.9.13 for more information.

Hide CCS Desk– When CCS Desk minimized to system tray, it will not pop when there is an active call

Show Floating Call Window – When this option is selected, the standard CCS Desk call window is displayed when there is an active call.

Show Floating Tooltip with Campaign Calls – When this option is selected, the standard CCS Desk call window is displayed when outgoing campaign (CCS Call) calls are in progress.

Active Call Window Display Opacity – This is used to increase or decrease the transparency of the floating call window / tooltip.
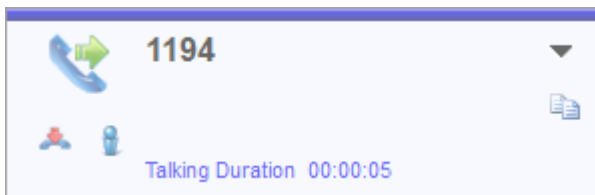
Queue Statistics Popup Display Options – This is used to display the statistics of queues inside the system.

Enable CCS Desk Diagnostic Trace File – This is used for diagnosing a system. This should always be disabled unless a CCS employee instructs you to enable it. The diagnostic trace file can be found in My Documents, named CCSDESK with a timestamp.
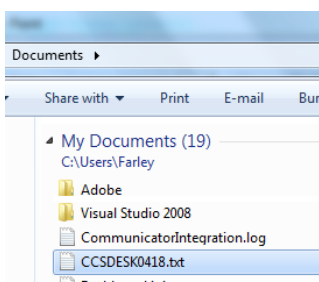
Advanced CCS Desk Configuration (Restricted) – Please consult section 1.13.2 for more information on this area.

SMTP Email Settings – Configure the SMTP email server address for sending email notifications, applicable only when CCS Console is used.

Change Password – Allows agent to reset their login password.

HEAT Settings – Available when agent is configured to HEAT integration. This allows the user to specify the ODBC data source, username and password in order to connect to HEAT.

MSCRM Settings – Available when agent is configured to MSCRM integration. This allows the user to enter a specific username, password and domain in order to connect to MSCRM. This is not normally required, in most cases the CRM integration will work using the logged in Windows user.

Maximizer Settings – Available when agent is configured to Maximizer integration. This allows the user to specify the ODBC data source, username and password in order to connect to Maximizer.

1.13.1   CCS Record Options
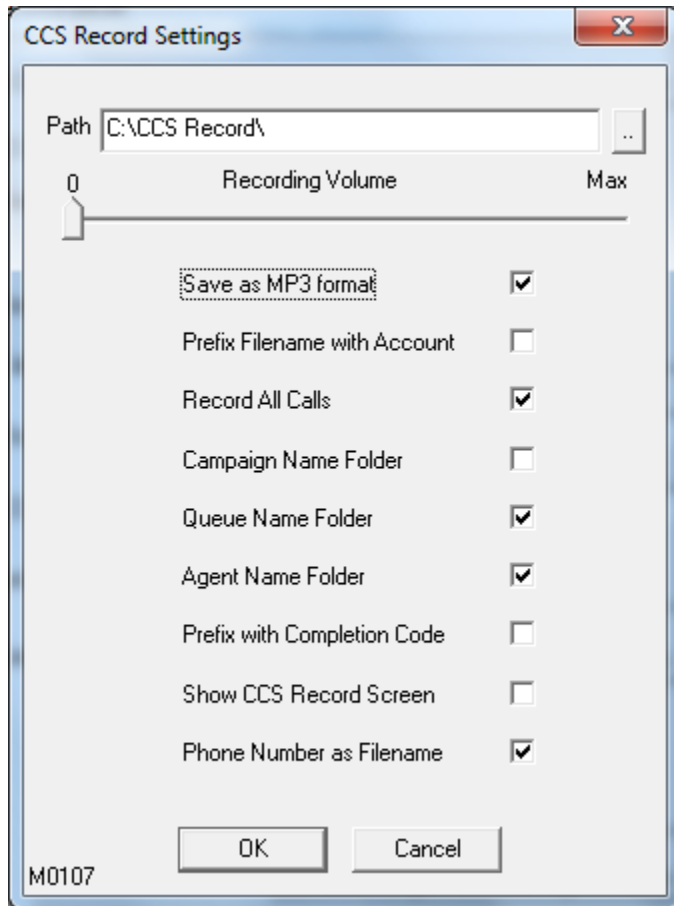
Path – The location where the recording files will be stored.

Recording Volume – This is only applicable to local recording. It is the microphone level during recording.

Save as MP3 format – Encodes the recording file to MP3 format.

Prefix Filename with Account – The recording filename will start with the name of the caller, if known.

Record All Calls – Automatically records every call.

Campaign Name Folder – Creates a sub-folder in the recording path with the campaign name. The call must be a campaign related call.

Queue Name Folder – Creates a sub-folder in the recording path with the queue name. The call must be a queue related call.

Agent Name Folder – Creates a sub-folder in the recording path with the agent name.

Prefix Filename with Completion Code – The recording filename will include the completion code name.

Show CCS Record Screen – Enables a dedicated CCS Record screen for easier on-demand recording session.
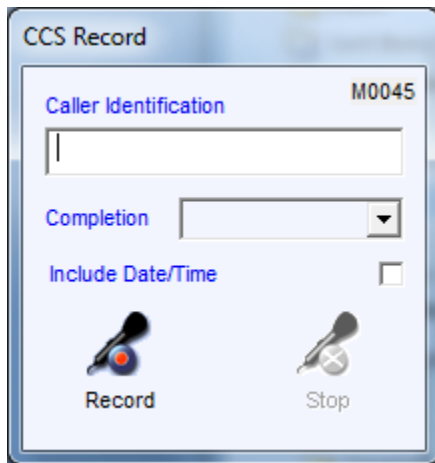
Caller Identification – The caller's number. It is automatically filled by CCS Desk if the information is present.

Completion – The available list of completion codes.

Include Date/Time – The recording filename will include the timestamp of when the recording starts.

Record / Stop – The start button and end button.

Phone Number as Filename – The recording filename will include the dialled / caller number if present.

1.13.2 Advanced CCS Desk Configuration

Inside CCS Desk Options, click the 'Advanced Options' to display the 'Advanced CCS Desk Configuration' dialog as shown below. The password is **CCS** (case sensitive).

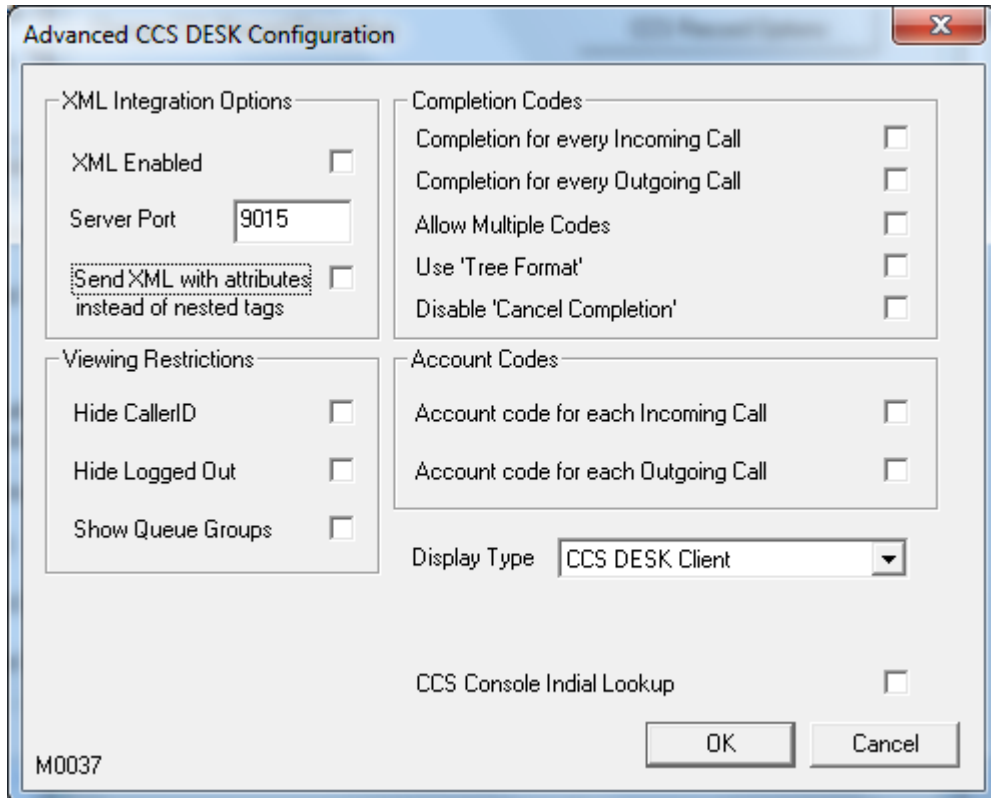**XML Enabled –** This option turns on or off the XML Integration feature on the CCS Desk client.

Server Port – Specifies the port to which the CCS Desk client will attempt to connect if XML Integration is enabled. Note that the actual port number is the configured number + session ID.

Send XML with attributes instead of nested tags – When this option is enabled, XML sent from the CCS Desk client will be sent in the following format:
<CallData ID="1" State="Connected"/>

If this feature is disabled, the XML would be sent as follows:
<CallData>
  <ID>1</ID>
  <State>Connected</State>
</CallData>

Hide CallerID – This option can be used to hide the caller ID on incoming calls in the CCS Desk call window.

Hide Logged Out – This option can be used to only show agents who are logged in.

Show Queue Groups – This option can be used to only show queue groups, not individual queues, in the queue statistics popup display.

Completion for every Incoming Call – If this option is enabled, every incoming call received will automatically have a completion code panel displayed.

Completion for every Outgoing Call – If this option is enabled, every outgoing call made will automatically have a completion code panel displayed.

Allow Multiple Codes – This option, if selected, will allow the entry of multiple completion codes.

Use 'Tree Format' – This option enables the grouping of completion codes into a tree structure.

Disable 'Cancel Completion' – This option disables the 'Complete Without Calling' button in the completion panel.

**Display Type –** switch between standard CCS Desk interface with CCS Console.

CCS Console Indial Lookup – use the Caller ID to search for CCS Report departments.

Account Code for Each Incoming Call - If this option is enabled, every incoming call received will automatically have an account code dialog displayed.

Account Code for Each Outgoing Call - If this option is enabled, every outgoing call made will automatically have an account code dialog displayed.
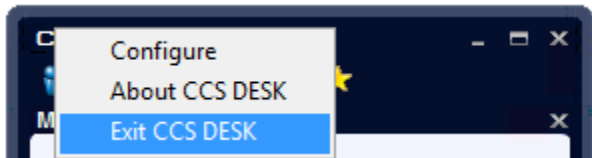
1.14 Always on Top

By default, the CCS Desk interface is not hidden and set to be 'Always On Top'. To enable / disable the on top feature, right click on the system tray icon and change the option as required.
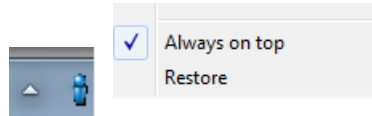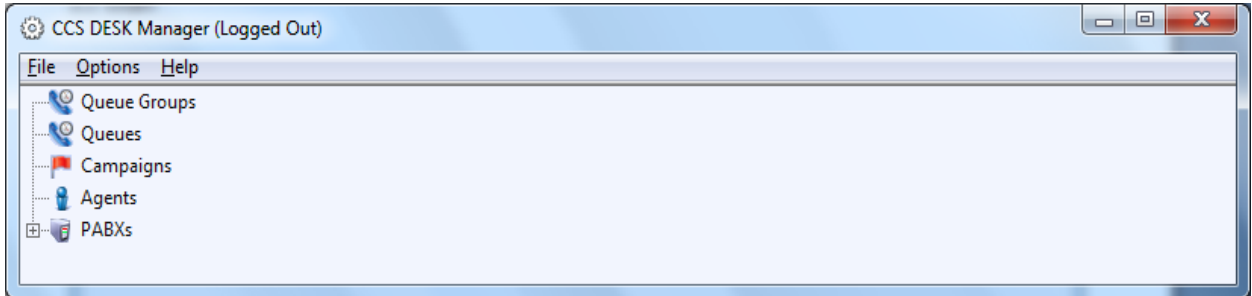
1.15 Logout

To log out of the application, right click on the CCS Desk title and select Exit CCS Desk.
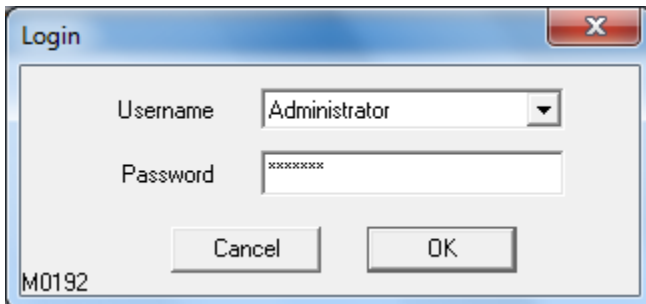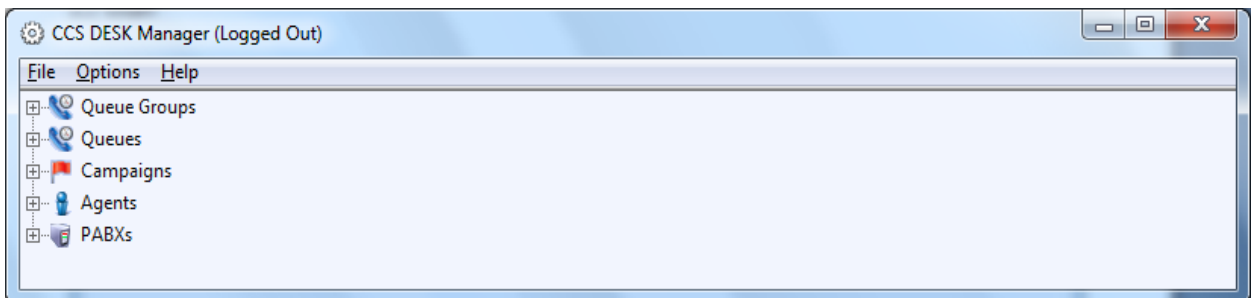
2. Using CCS Desk Manager

2.1 Login

To review the currently configured Agents and Queues in detail, you must first login into the application. Click on 'File', select 'Login' and enter your username and password. There is a system account called 'Administrator' that has the highest access and privilege. The default password is **CCSAdmin**. Please consult *CCS Desk Manager – System* Section 2.9.32 for more information.


The display is configured in a tree structure, with Queues, Campaigns, Queue Groups, Agents, and PABX as the first Branches. The title bar will display the name of user logged into CCS Desk Manager.

To log out from CCS Desk Manager, simply click File and Logout.

2.2 CCS Desk Manager Options

The CCS Desk Manager Options file menu is used to perform the initial configuration of the CCS Desk Manager. Selecting this menu option opens the following dialog.
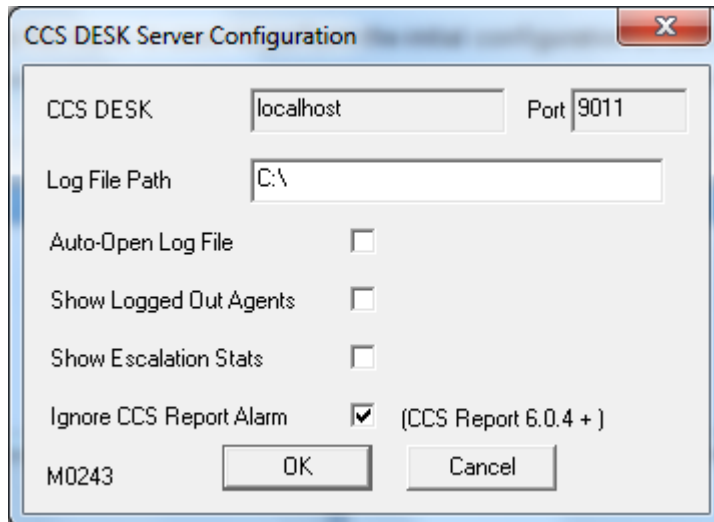
CCS Desk Server – Specifies the machine on which the CCS Desk server is running. This is configurable using CCS Desk Config.

Port – Specifies the port on which the server is listening for incoming connections. This is not configurable.

Log File Path – Specifies the path in which to store log files.

Auto-Open Log File – If this option is selected, log files generated when loading CCS Call campaigns are automatically opened at the completion of the load operation.

Show Logged Out Agents – If this option is selected, all logged out agents are displayed in a users CCS Desk window, along with those that are logged in. If it is not selected, the logged out agents are hidden from view.

Show Escalation Stats – If this option is selected, extra 'escalation' stats are shown in the CCS Desk Managers real time screen. These show how many calls have started in each queue and how many have been escalated out of each queue.

Ignore CCS Report Alarm – CCS Desk Server periodically checks the response of CCS Report Server. When this option is not ticked, an alarm will pop when the inactivity time exceeds 5 minutes. The alarm will go away on its own once CCS Report can be reached again. Please note that this feature will only work with CCS Report 6.0 SP4 or later. Do NOT enable this feature if you are not using the correct CCS Report version.

2.3   Monitor Queues

Display the Statistics of the Queue and the agents who are members of the Queue. Queues are grouped by their queue type.
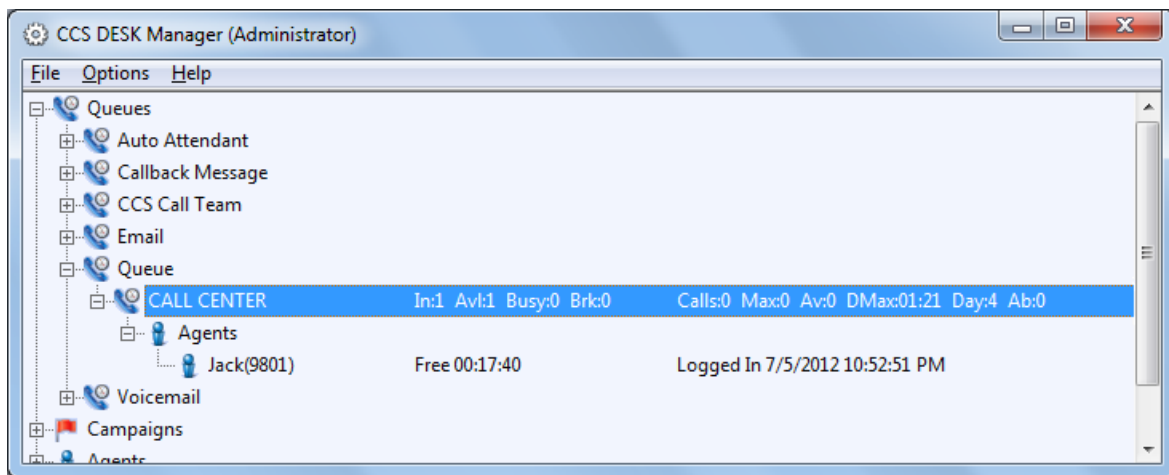
In – Number of Agents assigned into the queue

Avl – Number of Agents available to take calls in queue

Busy – Number of Agents busy

Brk – Number of agents on a break

Calls – Number of calls in the queue

Max – Maximum wait time of the current calls in the queue

Emails – Number of emails waiting for an available agent

Avg – Average wait time of the current calls in the queue

DMax – Daily maximum wait time of the current calls in the queue

Day – Number of Calls (or emails) into the queue today. (Since midnight or last system restart)

**Ab** – Number of abandoned calls today (*after* abandoned threshold set for each queue)

% - Percentage of calls abandoned

St – This shows how many of the 'Day:' calls for a queue actually started in that queue, i.e. they didn't get escalated into that queue. This stat is only shown if 'Show Escalation Stats' option is enabled in the CCS Desk Managers Options screen.

Esc – This shows how many of the 'Day:' calls for that queue were escalated from that queue to another. This stat is only shown if 'Show Escalation Stats' option is enabled in the CCS Desk Managers Options screen.

2.3.1 Drag and Drop Agents to/from a Queue

An agent can be added to a queue by simply dragging them from the 'Agents' branch of the tree to the appropriate queue. If the agent does not have the required minimum skill for the queue, the user will be given the option to automatically add the minimum skills to the agent.
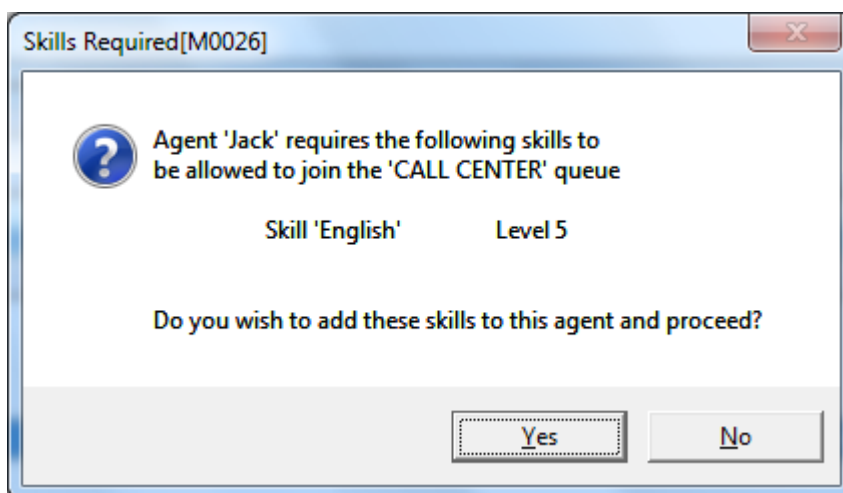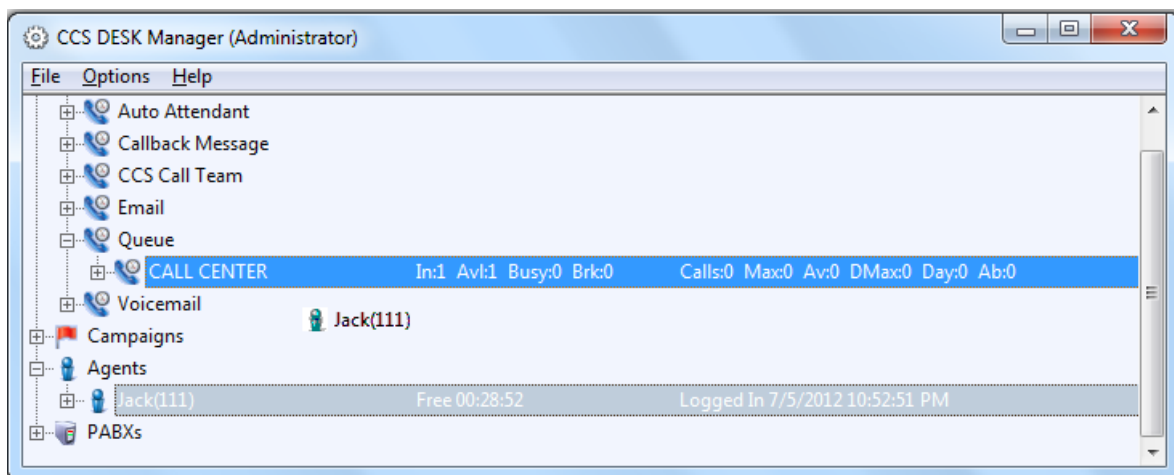
To remove an agent from a queue using the drag and drop method, drag the agent from the queue and drop them on the 'Agents' branch. When this action is performed, the user is prompted before the agent is actually removed from the queue. Alternatively, right click on the agent within the queue and select 'Remove Agent from Queue'
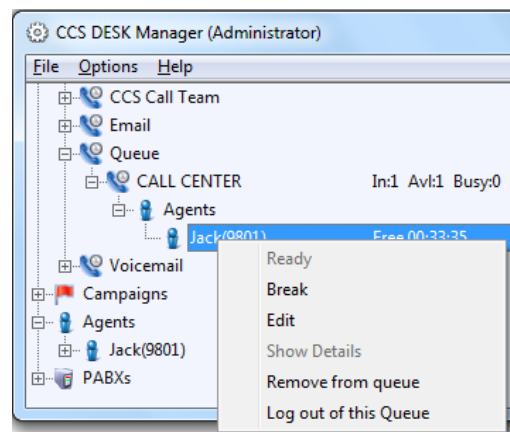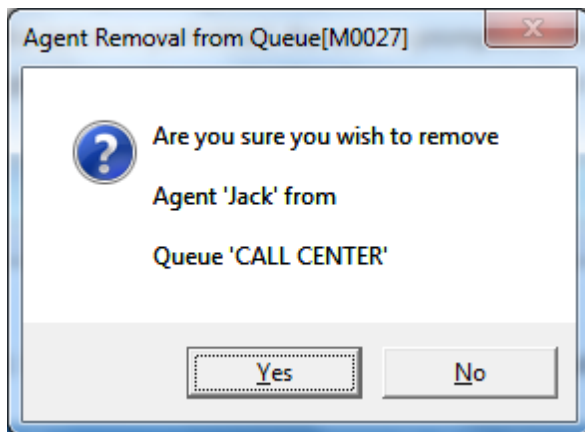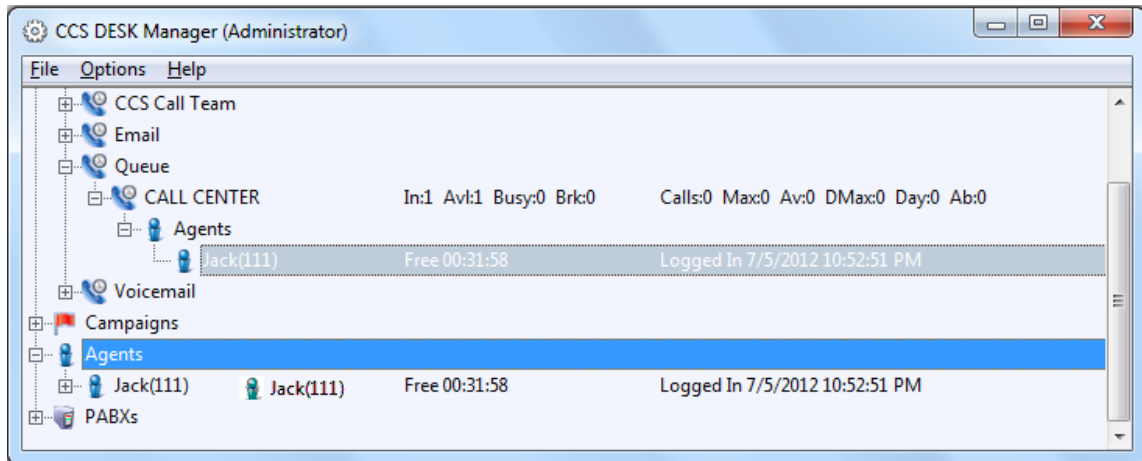
Multiple agents may be added and removed simultaneously using this drag drop method.

Although it is not possible to add an agent to a queue with insufficient skills, it is possible to change the skills of an agent after they have been added. If they are changed such that the agent no longer has sufficient skills, this is shown as below.

The red circle with a white cross behind the agent icon indicates the agent has insufficient skills.

2.3.2   **Queue Details View**

When user right-clicks on a queue and selects 'Show Details', the Queue Details View screen will be displayed as shown below. This screen provides a graphic representation of the queue and includes number of agents logged in, and their status, information on queue times, as well as the number of calls in this queue. The statistics reset daily at midnight.
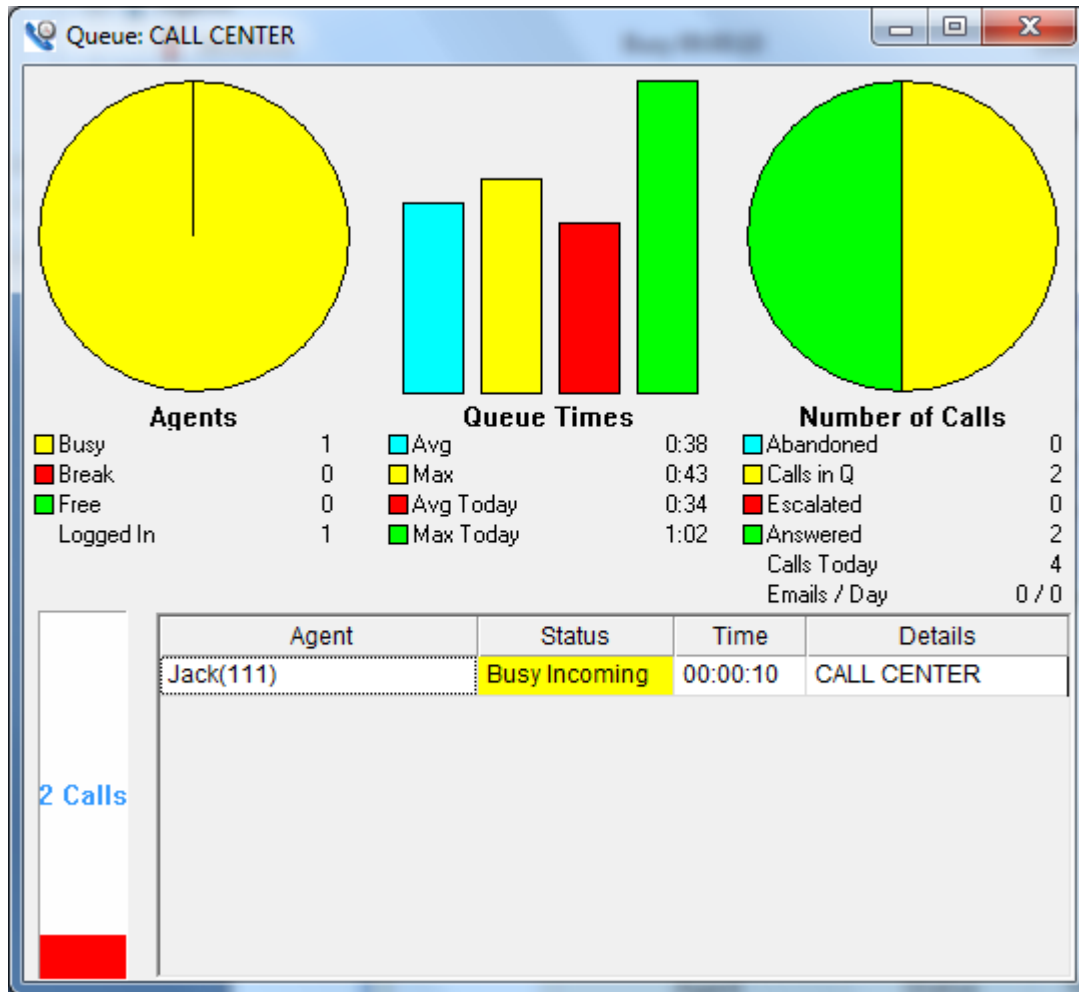
The Agents graph represents the number of agents in the queue that are busy, on a break and free to take calls.

Busy – Number of busy agents in the queue.

Break – Number of agents in the queue that are on a break.

Free – Number of agents in the queue that is available to take calls.

Logged In – Number of agents currently logged in that are assigned to that queue

The Queue Times graph represents the wait time for calls currently in the queue and for today.

Avg – the average queue time of all calls currently in the queue.

Max – the maximum queue time of calls currently in the queue.

Avg Today – Average queue time of all calls today.

Max Today – Maximum queue time of all calls today.

The Number of Calls graph represents the number of calls currently in the queue and for today.

Calls In Queue – Number of calls currently waiting in the queue.

Abandoned – Number of calls that have been abandoned from the queue.

Escalated – Number of calls that have been escalated from the queue.

Answered – Number of calls that have been answered by an agent in that queue.

Calls Today – Number of calls that enter the queue today.

Emails / Day – Number of emails waiting in the queue / number of emails today.

The bar chart to the left of the agent details shows the number of calls currently in the queue.

2.4   Monitor Campaigns

To display the current campaigns status. Campaigns are grouped by their campaign type.
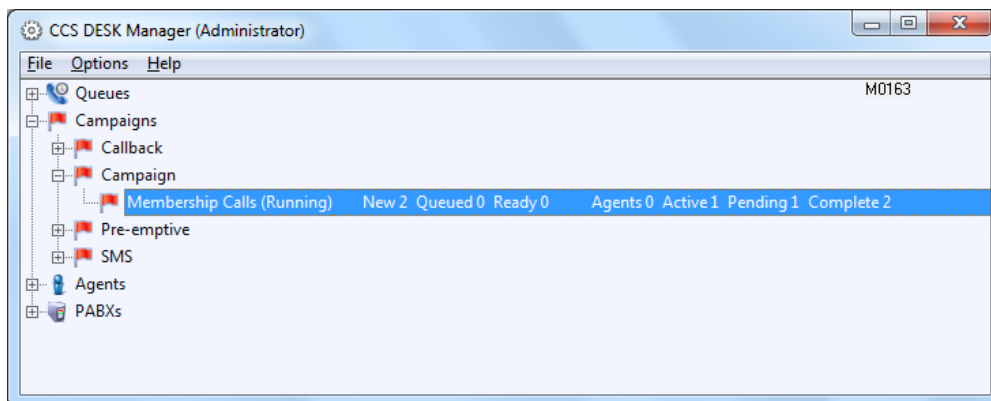
New – Number of calls yet to be made in the campaign

Queued – Number of calls ready to be made

Ready – Number of agents ready to make calls

Agents – Number of agents who are logged into the campaign

Active – Number of active Calls

Pending – Number of calls to be retried

Complete – Number of calls that have been closed

When using the Pre-emptive mode, the Ready statistic will be replaced with:

Dialling – Number of outbound ports calling out

2.4.1 Campaign Details View

When the user right-clicks on a campaign in the real time display and selects 'Show Details', the Campaign Details View screen will be displayed, as shown below. This screen provides a graphic representation of the campaign calls, agents and completion codes. The statistics reset daily at midnight.

The Agents graph represents the number of agents in the queue that are busy, on a break and free to take calls.

Busy – Number of busy agents in the queue.

Break – Number of agents in the queue that are on a break.

Free – Number of agents in the queue that is available to take calls.

Logged In – Number of agents currently logged in that are assigned to that queue

The Calls graph represents the campaign status.

New – Number of calls yet to be made in the campaign

Queued – Number of calls ready to be made

Ready – Number of agents ready to make calls

Active – Number of active Calls

Pending – Number of calls to be retried

Complete – Number of calls that have been closed

The graph on the right shows how many of each completion code have been entered. This list is sorted with the highest count at the top, and the top 6 codes are displayed in the bar chart.

2.5 Monitor Queue Groups

Queues can be grouped together for reporting to provide an overview. The queue group combines the Inbound and outbound queues statistics.
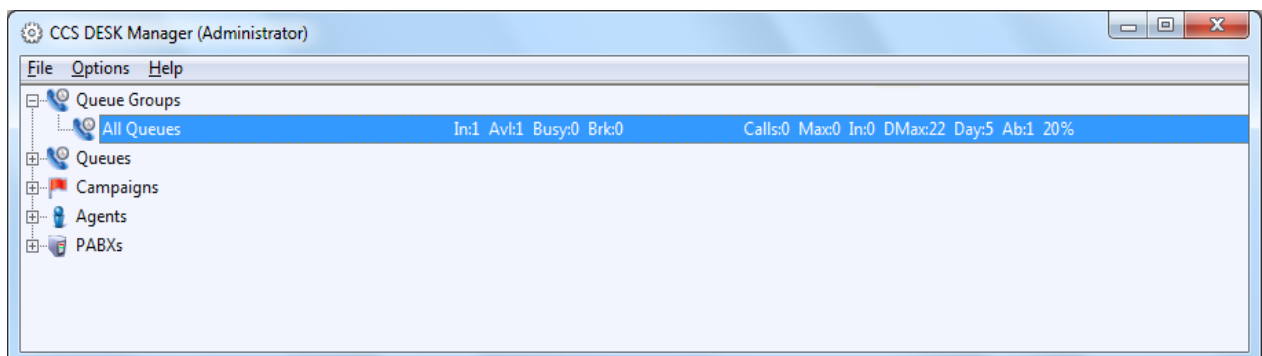
2.6   Monitor Agents

The display indicates the agent's status, by expanding the tree we can see the queues an agent is a member of and the current extension the agent is logged in at.
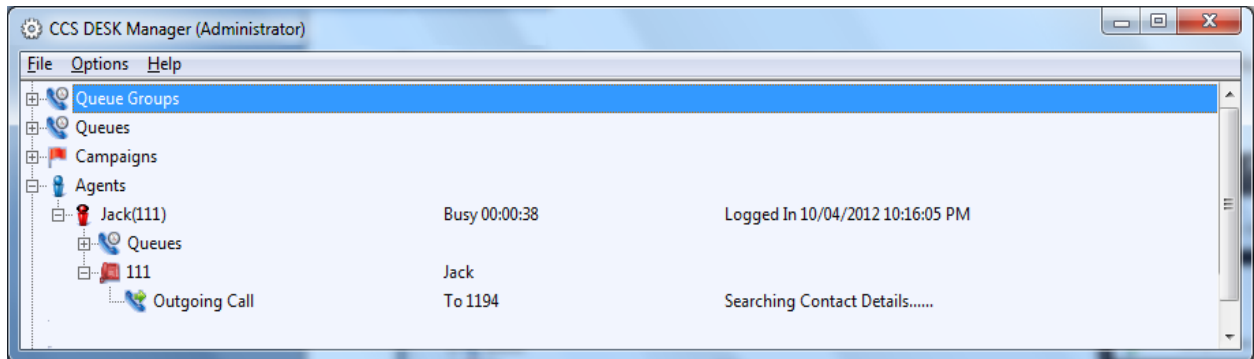
When an agent is on a call to a contact whose details are registered in an integrated CRM, the details of the caller will be displayed in the CCS Desk Manager Real-Time screen.

2.6.1   Agent Control from CCS Desk Manager

By right-clicking on an agent in CCS Desk Manager the supervisor / administrator may perform various actions such as putting an agent on a break, setting an agent ready, and forcing an agent to log out.
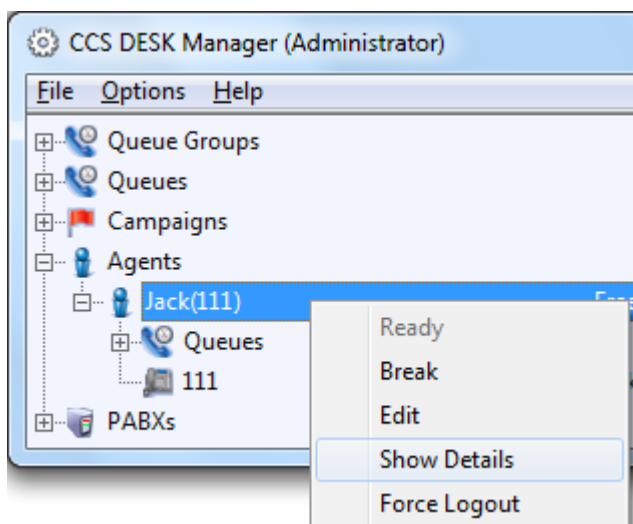
2.6.2 Agent Details View

When the user right-clicks on an agent name and select 'Show Details', the Agent Details View screen will be displayed as shown below. The statistics reset daily at midnight.
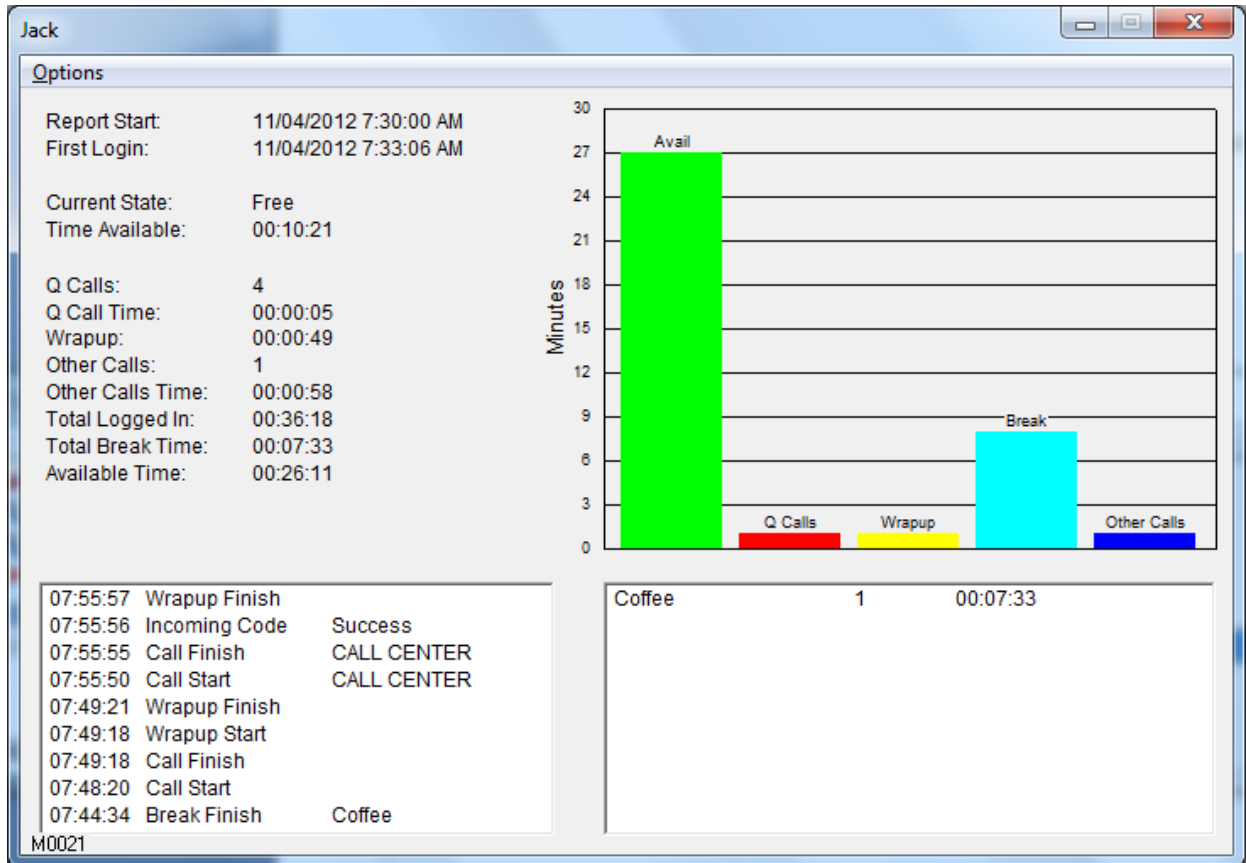
The top left of the screen identifies the agent, the time and date the report starts and finishes. Totals for each activity type are provided in a list on the left hand half of the screen. The bottom left corner details the most recent activities of the agent. The window area below the Graph displays the break types and the duration of each break type for the agent today.

The graph represents the time the agent has spent in the 5 statuses today.

Avail – the total time agent is available to take calls

CCS Q Calls – the total time spent on calls related to a queue

Wrap-up – the total time spent in wrap-up mode each call

Break – total time spent on breaks

Other Calls – total time spent on other calls (not related to a queue)

2.6.2.1 Agent Details View Option

The 'Set Start Time' option changes the data shown in the Agent Details View. Any data before the start time will be ignored. This is a global setting that affects all agents.
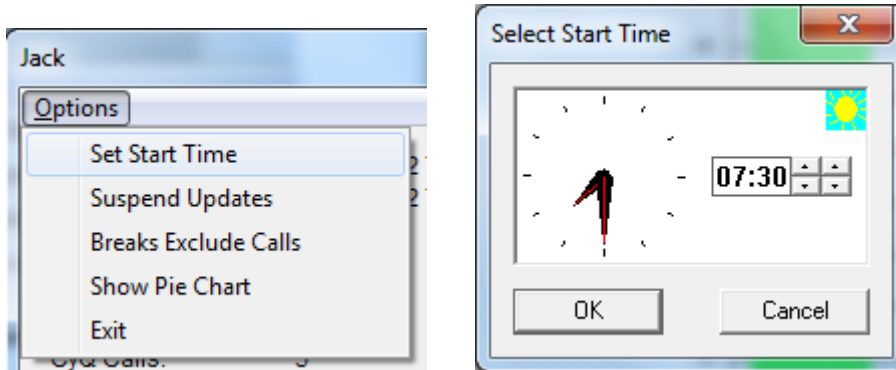
By default the start time is set to 09:00. Thus if agents logged in earlier than that, their activities prior to 09:00 is filtered out by the Agent Details View.

The 'Suspend Updates' option stops the Agent Details View from showing any further update for that particular agent. No actual data will be lost while Agent Details View does not update its screen.
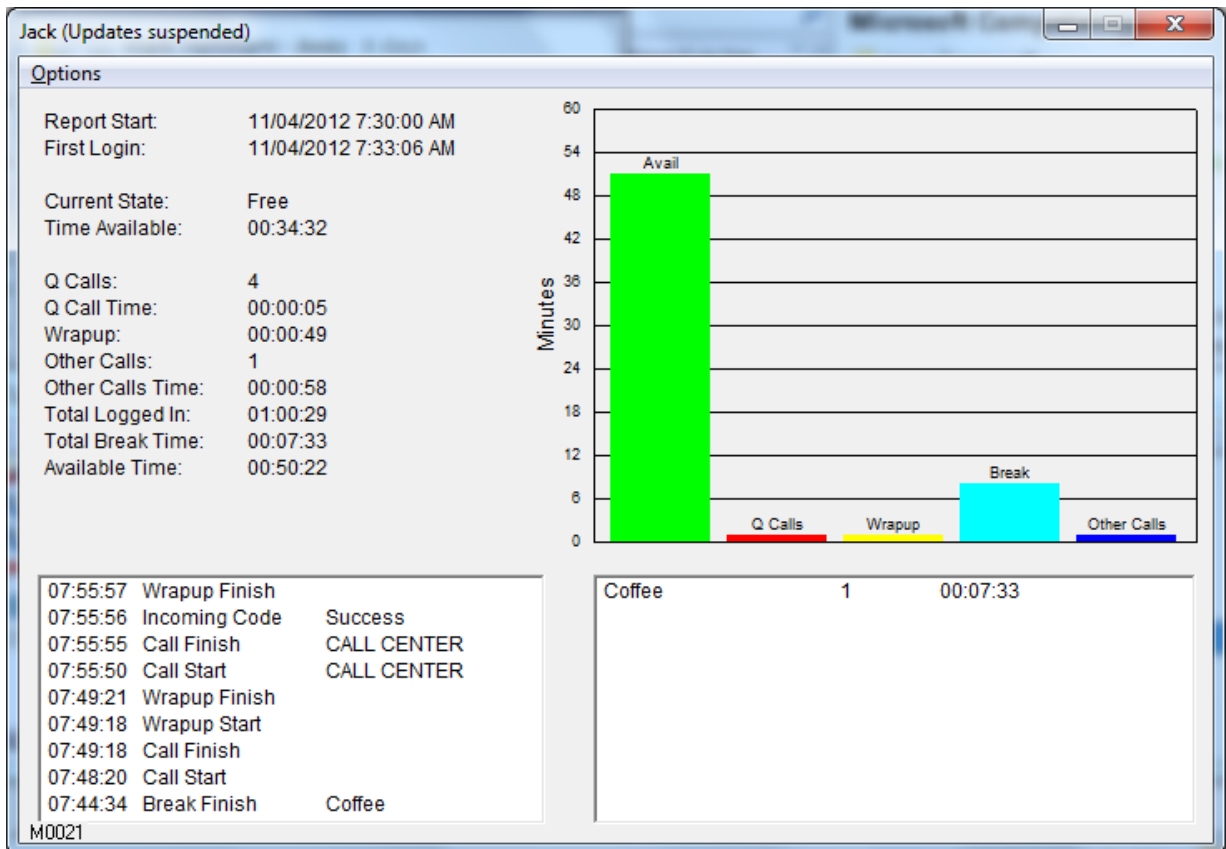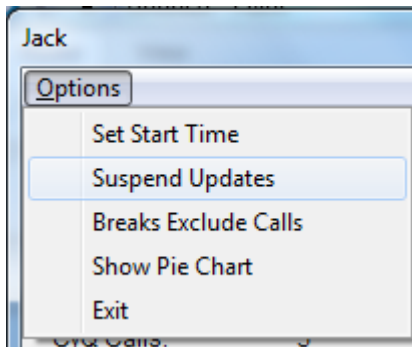
The 'Break Exclude Calls' option changes how the Agent Details View handles breaks. With the option turned off, break reporting works the way it always has, but turning this option on makes breaks be 'interrupted' by calls.
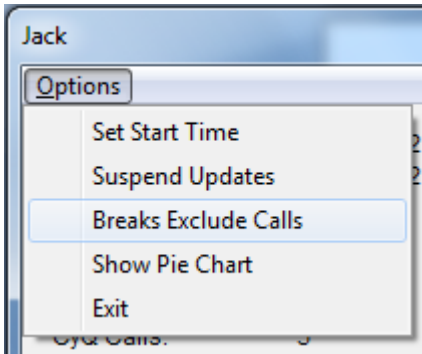
For example:

Agent goes on a Coffee Break.

After 10 seconds makes a call. That call lasts 12 seconds.

The agent stays on a break for a further 41 seconds.

With the option turned off, the Agent Details View will show agent had 1 break for 1:03 minutes.

With the option turned on, the Agent Details View will show agent had 2 breaks for 51 seconds.

Selecting 'Show Pie Chart' from the options menu allows the statistics to be displayed as a pie chart.
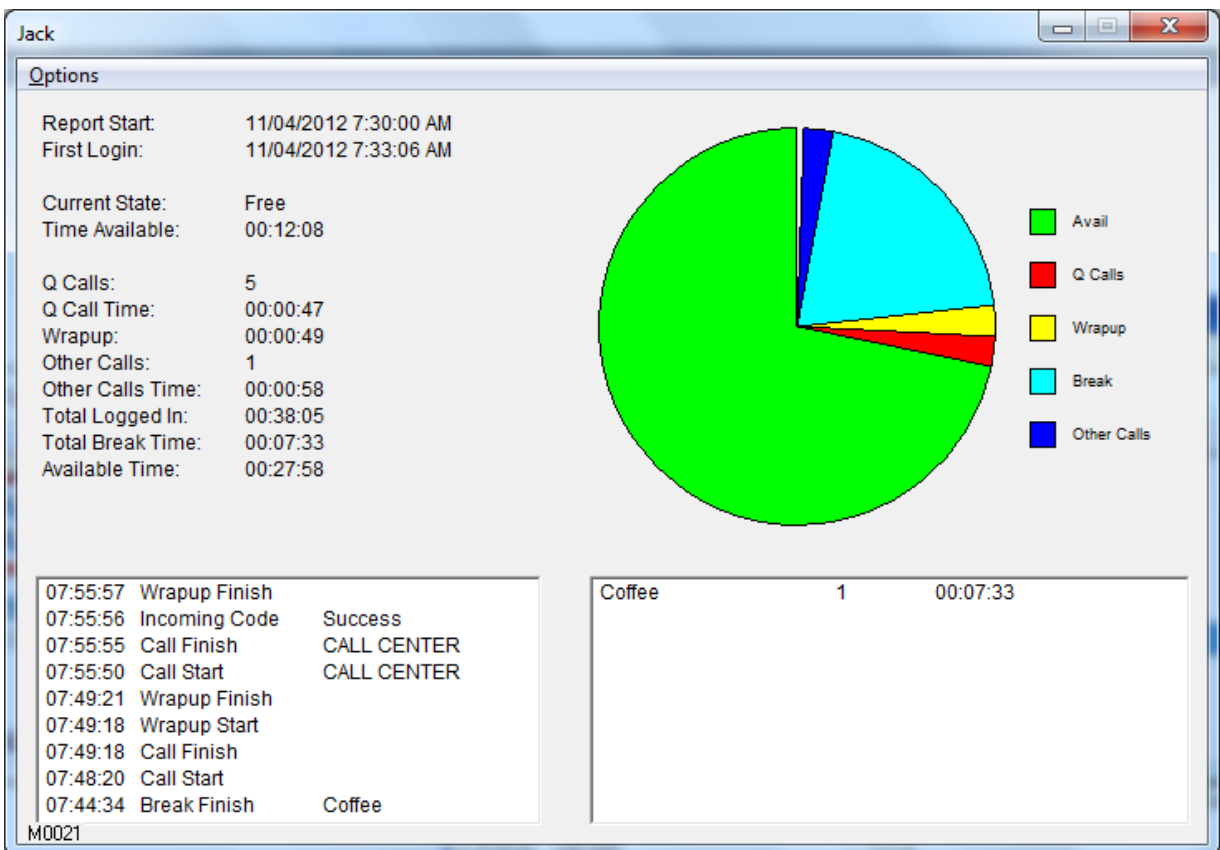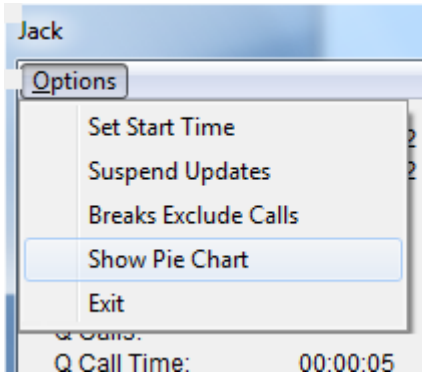
2.7   Monitor PABX

The display shows activity of all devices which are being monitored, i.e. the CCS Desk system is receiving information from the telephone system about that extension. If this is not the case, if the telephone is not being monitored for any reason, the telephone device will show with a red X on it.

Multiple PBXs can also be monitored with the same interface.
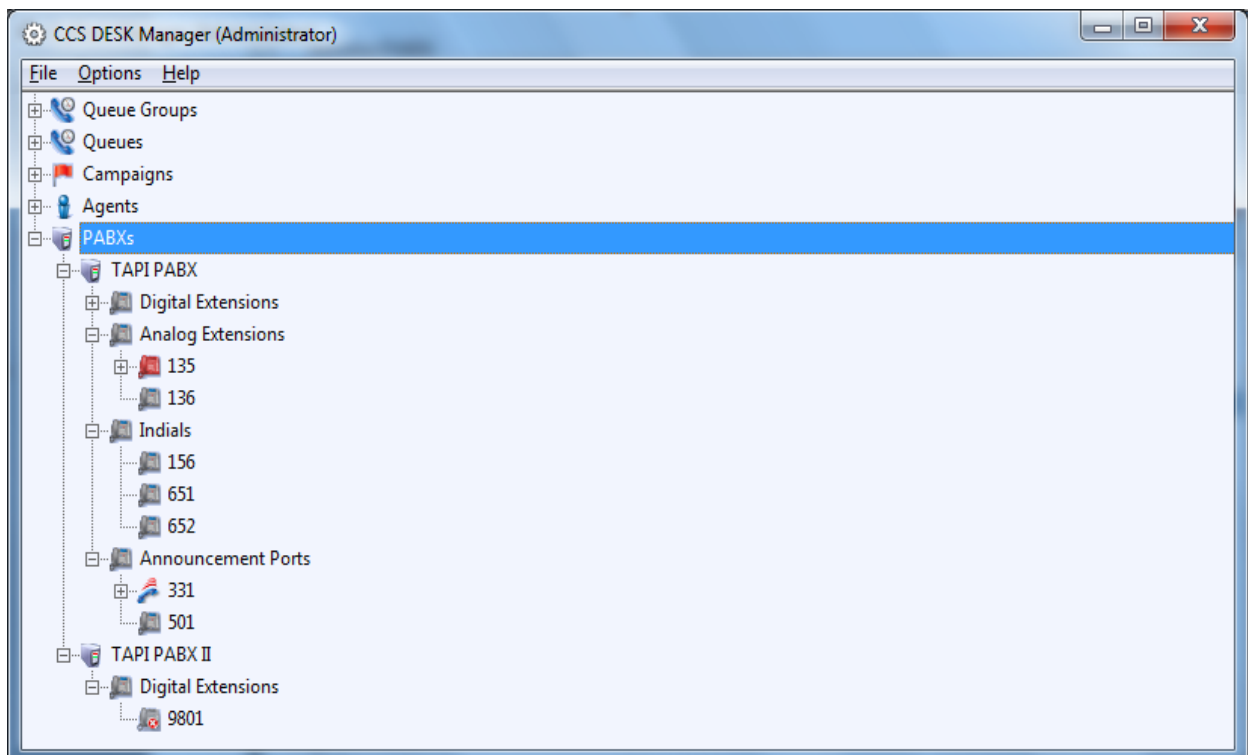
2.7.1   Resetting an Announcement Port

The administrator may reset an announcement port by right-clicking on the port in the device list and selecting Reset Port. The port reset will disconnect any active call in the port. This feature should only be used for troubleshooting and testing purposes.
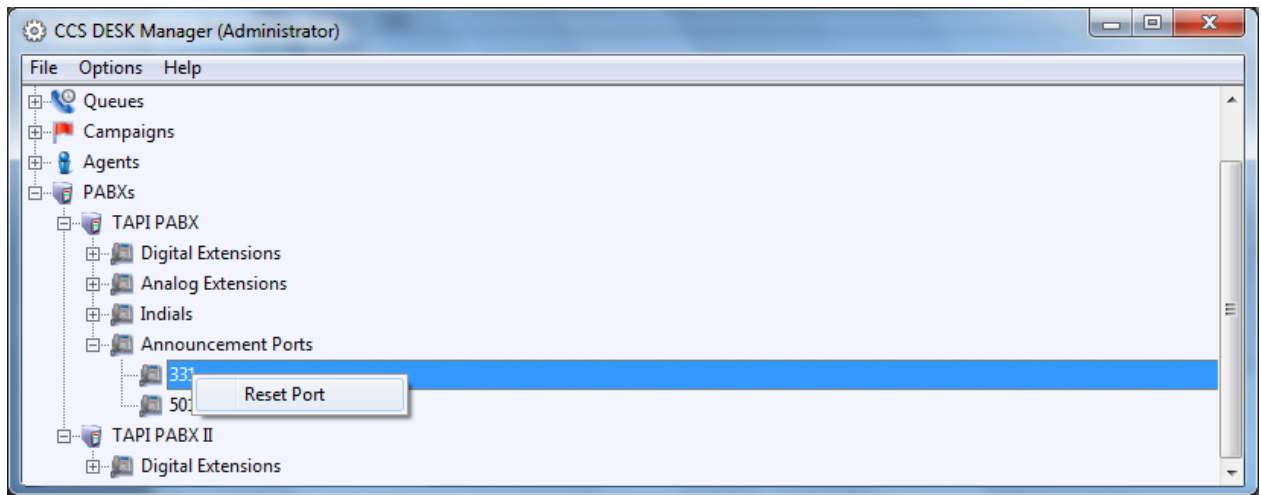
2.7.2   Clear Call from System

The administrator may clear a call from CCS Desk's memory by right clicking on a call that is active at the device. Clearing the call from CCS Desk will not disconnect the physical call – if exist – and will not clear the device status from the PBX. Please use it carefully as it may cause unsynchronized information between CCS Desk and the PBX.
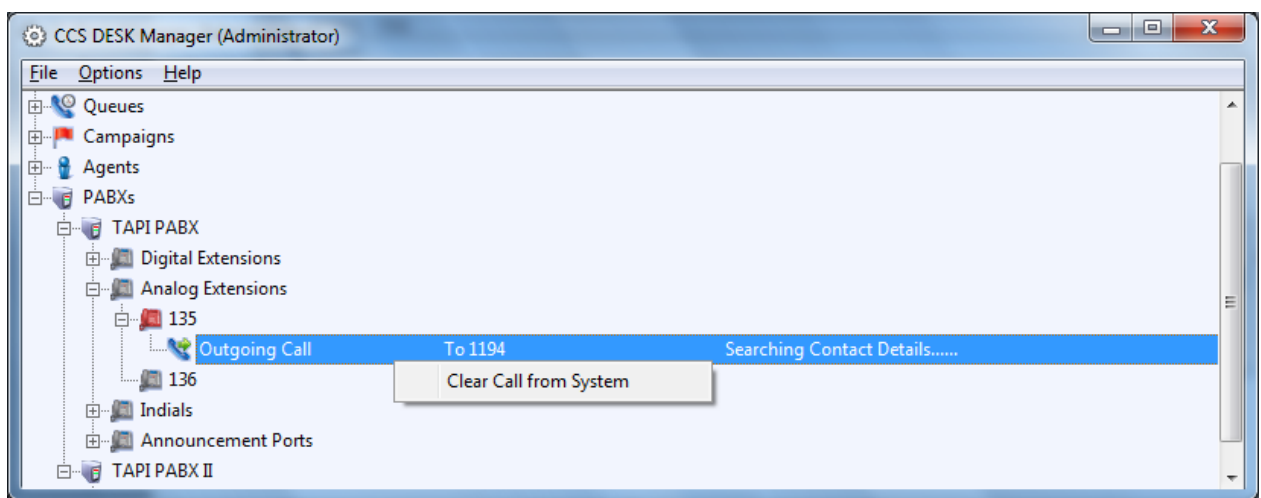
2.8 Real-Time Call Handling

When a caller is waiting in an incoming queue, the call may be routed in real-time to an available agent inside or outside the queue. The call is simply dragged from the queue to an available agent, thereby transferring that call to the agent. This feature provides the functionality to fast track important callers through the queue to someone who is available to take their call.
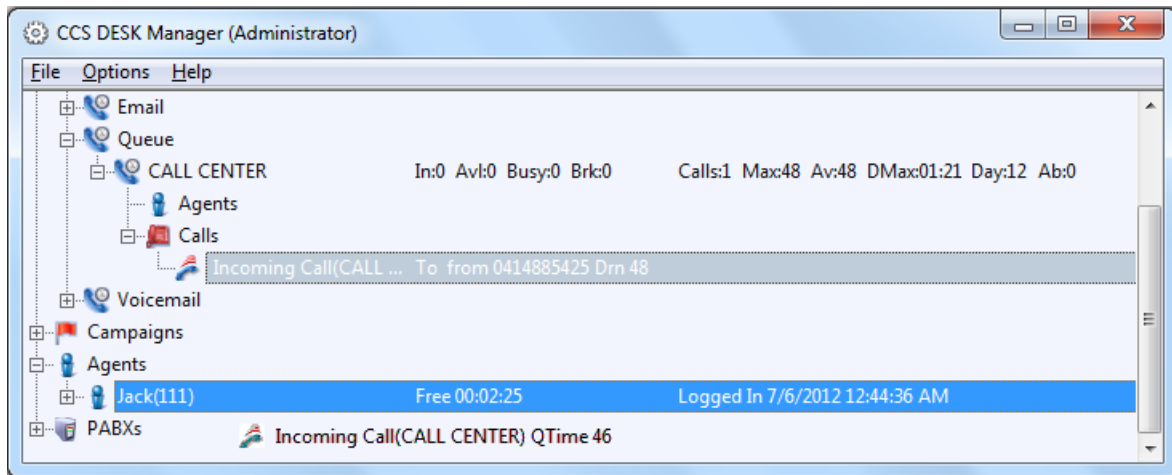
2.9   Emergency Mode

Emergency mode can be enabled to quickly switch CCS Q into 'out of service'. Such feature is required during emergency situations e.g. fire or earthquake, and administrator wants to ensure call is still attended in the best possible way.

Emergency mode can be activated with CCS Desk Manager by simply selecting the option and click 'Yes' on the following alert screen.
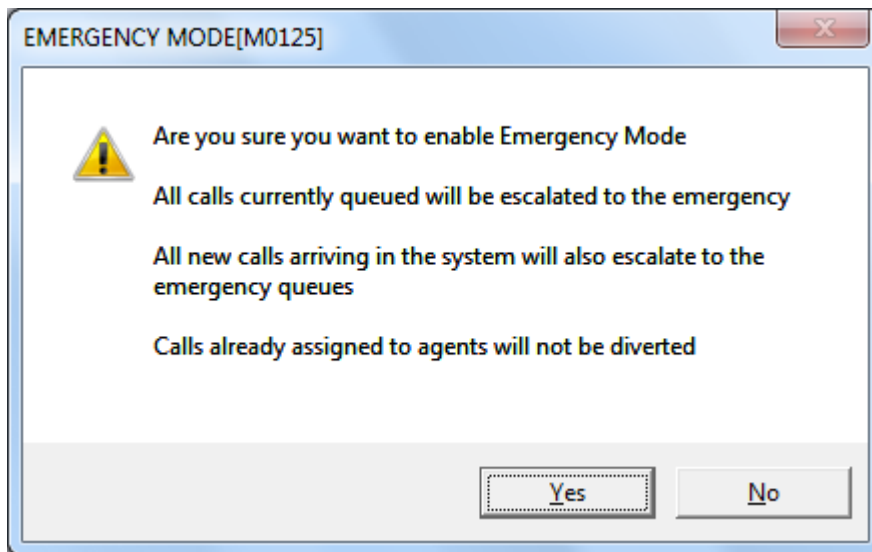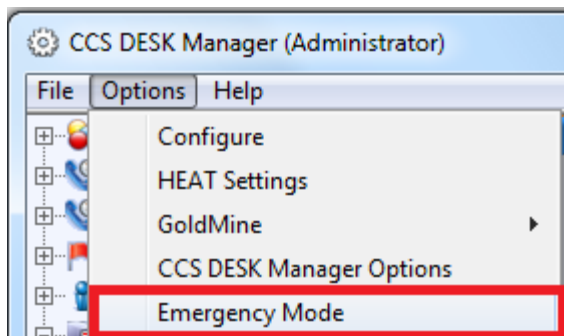
CCS Desk Manager will show this mode on its header when it is active. To disable, select Emergency Mode from the Options menu again.
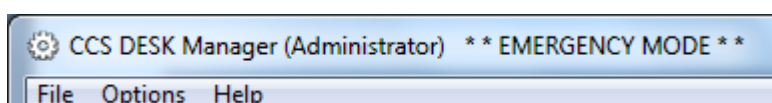
3. Using CCS Report Web

The CCS Report Web Application allows users to run reports, subscribe to scheduled reports, print and export reports in Excel or PDF format for further manipulation.

3.1 Getting Started with CCS Report Web

CCS Report Web is a web based client which only requires a URL to access the reports. To run CCS Report Web, open up Internet Explorer and type in the CCS Web URL.

Assuming that the CCS Report Web machine name is *7ult* and the website is installed on the IIS default website port 80, the URL is ***http://7ult/CCS%20Report***

To login, use the default user ID '*Administrator'* with a blank password.
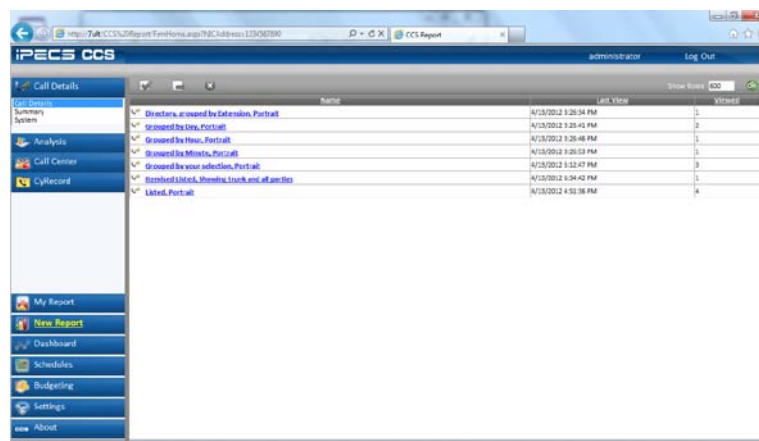
3.2 Run a New Report

To Run a new Report, select a report of your choice from the 'New Report' folder and click on it to open the three step reports wizard.
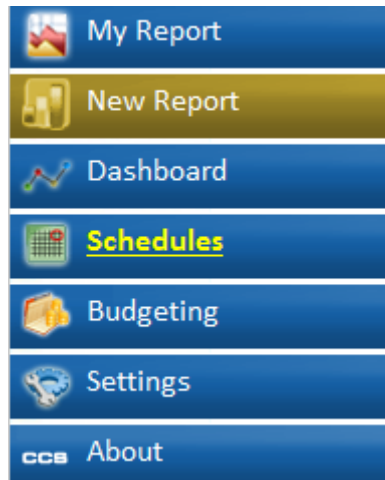
In this example, we are going to run a report for CCS Desk agent break. Click on 'Call Centre' to open the category tree, then CCS Desk sub category and then click on 'Break Count Grouped by Agent, Portrait'.
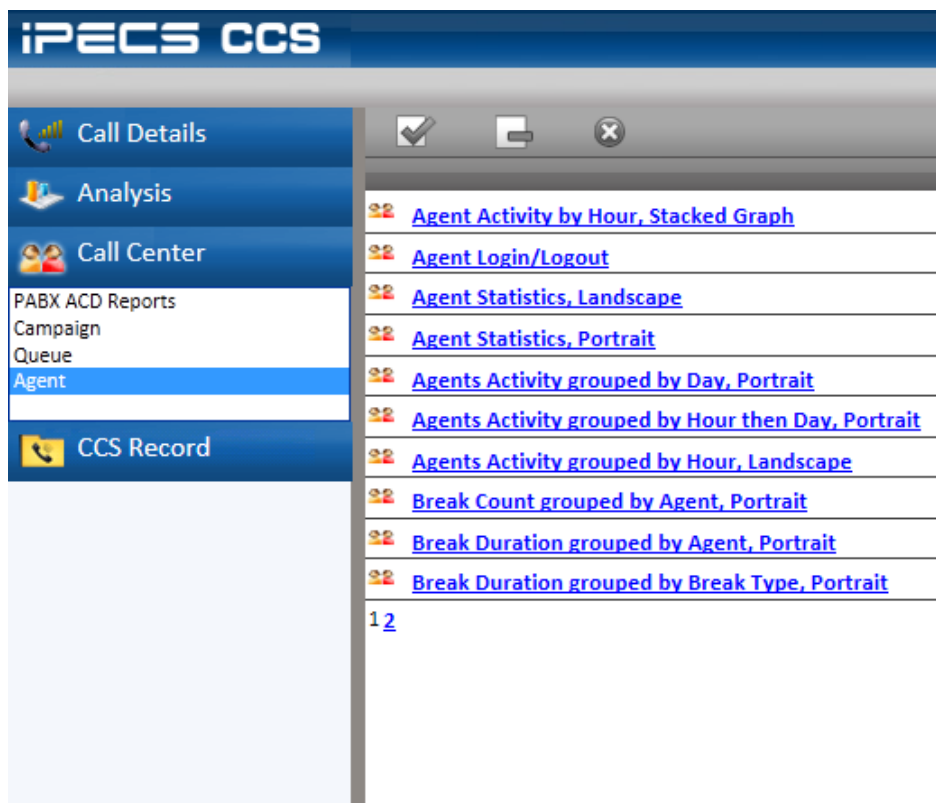
3.3   Filter – Step 1

CCS Report Web guides you through the process of selecting data and options for your Report in a simple 3 Step Wizard. The first step allows you to select from a list of multiple criterion. Each inidividual filter criteria will be discussed in more details in this section.
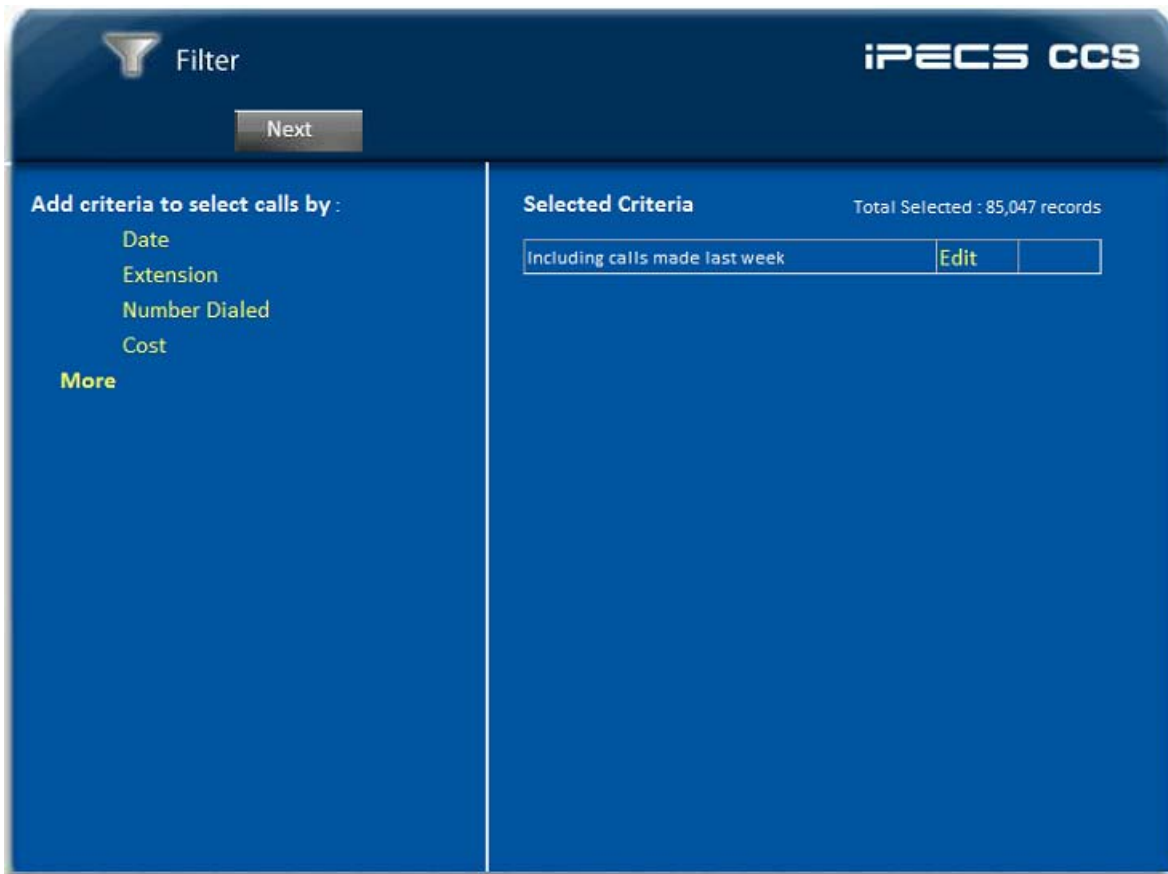
The default filter will generate a report that contains all calls made on today's date. To add a filter simply click on the criteria from the left hand plain or to remove a filter click on delete on the right plain under selected criteria.
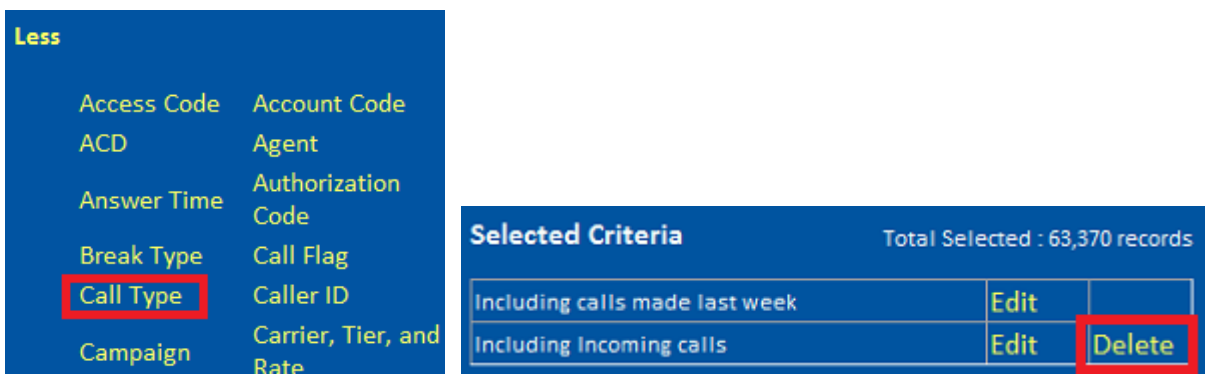
3.3.1   Date Range

To change the date range, click on the Edit label on the right hand plain. By default the date range is set to 'Today'.

This will open another window with more details. From the 'Selected' drop down list, select the applicable date range.
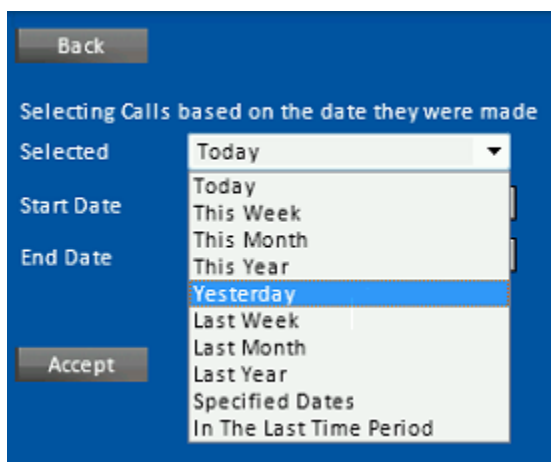
Selecting 'Specified Dates' allows user to select a start and end date.
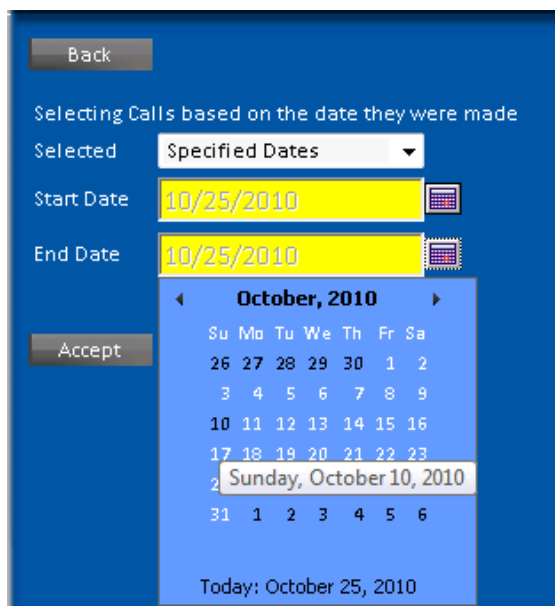
3.3.2 Extensions

Calls can be filtered based on the **Extension** number. This filter requires one boolean operators and specific numeric values.

3.3.3 Numbers Dialed

Calls can be filtered based on the **Numbers Dialed**. This filter requires one boolean operators and specific numeric values.
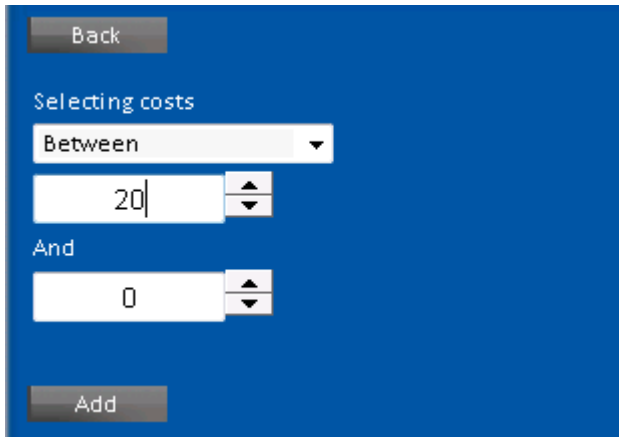
3.3.4   Cost
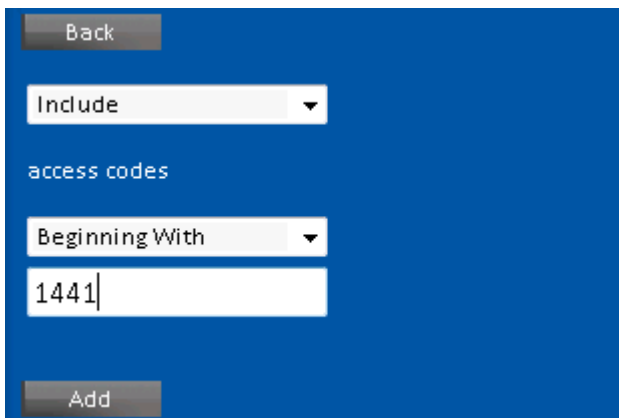
Calls can be filtered based on the **Cost** calculated by CCS Report. This filter requires one boolean operators and specific numeric values.


3.3.5   Access Codes

If the PABX supports this feature, calls can be filtered based on the **Access Codes**. This filter requires one boolean operators and specific numeric values.

3.3.6 Account Codes

If the PABX supports this feature, calls can be filtered based on the **Account Codes**. This filter requires one boolean operators and specific numeric values.

3.3.7 Access Codes

If the PABX supports this feature, calls can be filtered based on the **Access Codes**. This filter requires one boolean operators and specific numeric values.

3.3.8 Agent

When integrated with CCS Desk, CCS Report can filter the calls based on the **CCS Desk agents**. Because of the complex scenario and possibilities that could happen with a call i.e. transfers, diverts, recalled, etc., there are 3 modes available that determines how the report analyzes the agent data.
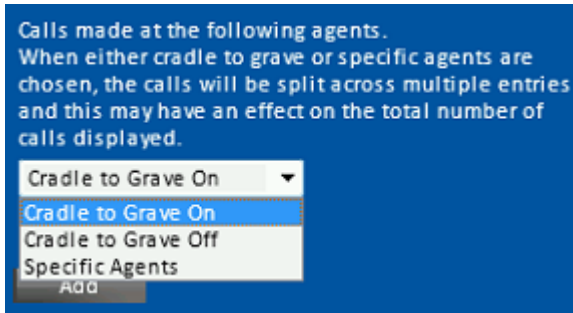
Cradle to Grave On – calls and statistics are split and reported against each agent involved in the call.

Cradle to Grave Off – calls and statistics will be combined and reported against one agent, which can be chosen from the following: **First Agent**, **Last Agent**, or the one with the **Longest Talk Time**.
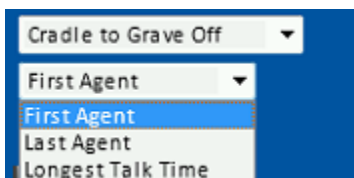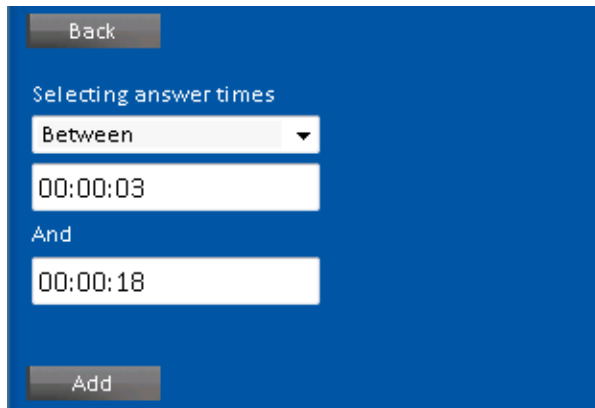
Specific Agents – select a list of agents that will be included in the report. Excluded agents' calls and statistics will be ignored by the report
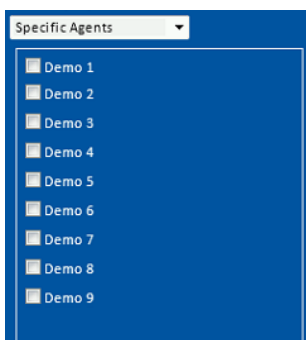
3.3.9 Answer Time
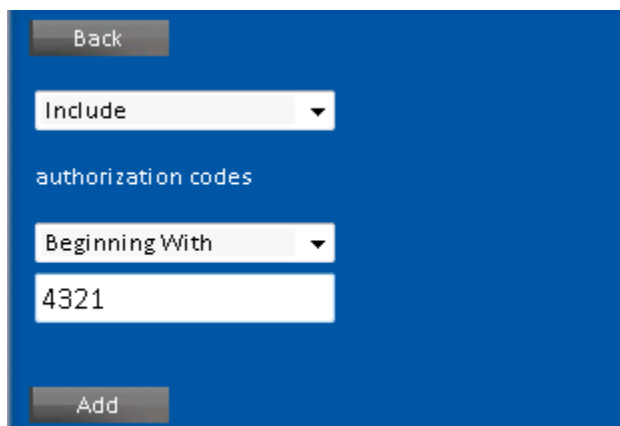
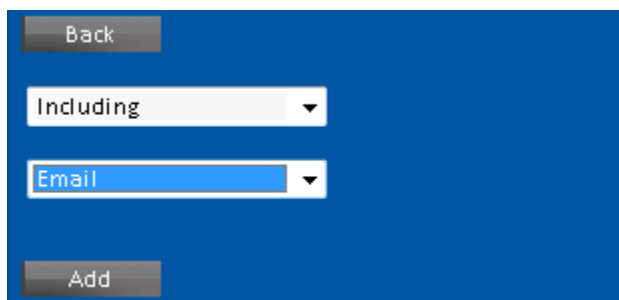If the PABX supports ths feature, calls can be filtered based on the **Answer Time**. This filter requires one boolean operators and specific *hh:mm:ss* values.

3.3.10 Authorization Codes

If the PABX supports this feature, calls can be filtered based on their **Authorization Codes**. This filter requires one boolean operators and specific numeric values. You can also 'Exclude' the selected codes.

3.3.11 Break Type

When integrated with CCS Desk, CCS Report can filter the calls based on the **Break Types**.
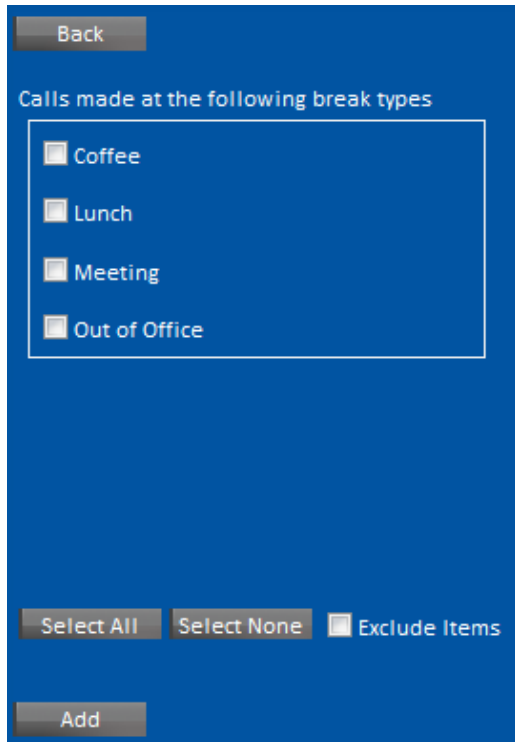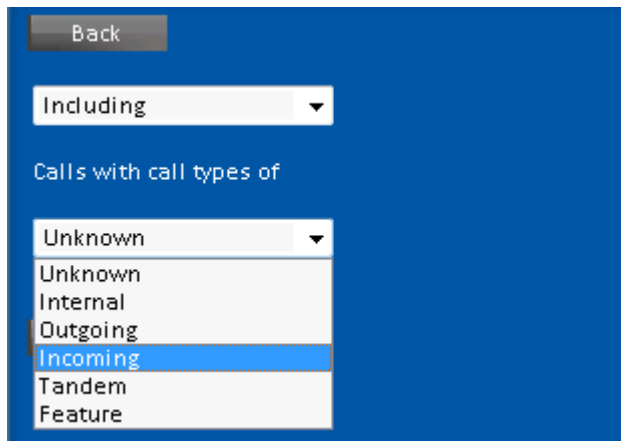
3.3.12 Call Flags

If the PABX supports this feature, calls can be filtered based on their **Call Flags**. This filter has two drop-down menus. The first one defines if the call type should be **included** or **excluded**. The second defines the call flag.
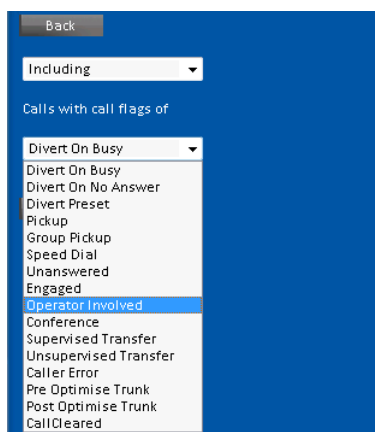
3.3.13 Call Type
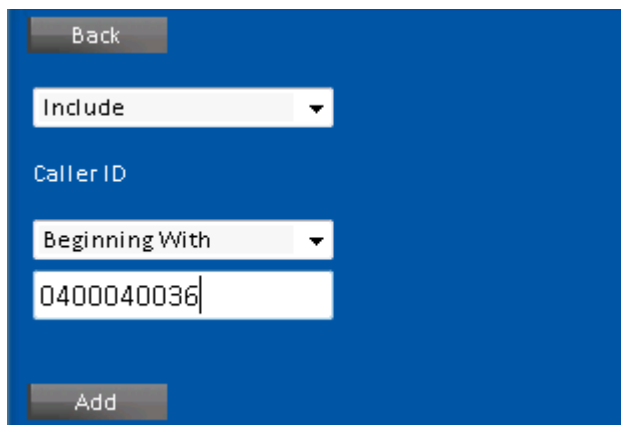
Calls can be filtered based on their **Call Type**. This filter has two drop-down menus and one edit box. The first menu defines if the call type should be **included** or **excluded**. The second menu defines the call type.

3.3.14 Caller ID

If the PABX supports this feature, calls can be filtered based on the **Caller ID**. This filter requires one boolean operators and specific numeric values.

3.3.15 Campaign

When integrated with CCS Q or CCS Call, CCS Report can filter the calls based on the **campaigns**. Click 'Campaigns' and simply tick the required campaign. You can also 'Exclude Items' selected.
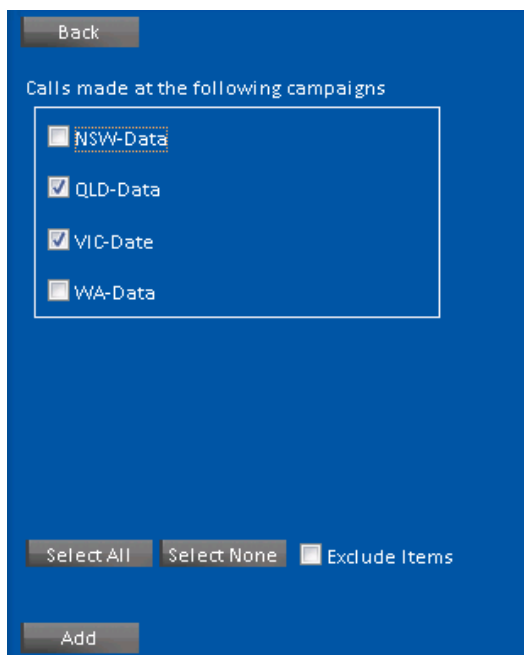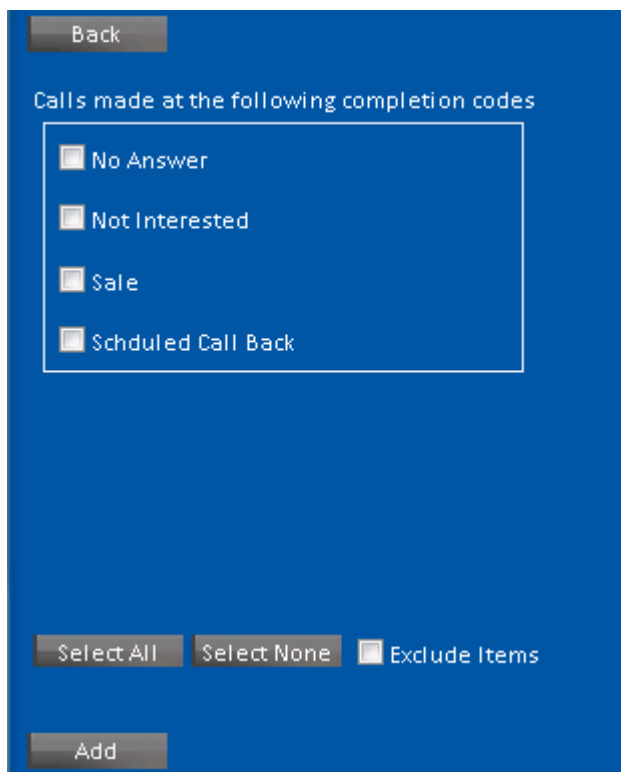
3.3.16 Carrier, Tier, Rate

Based on the carrier setting in CCS Report, reports can be filtered using corresponding **Carrier**, **Tier,** or **Rate** selection.
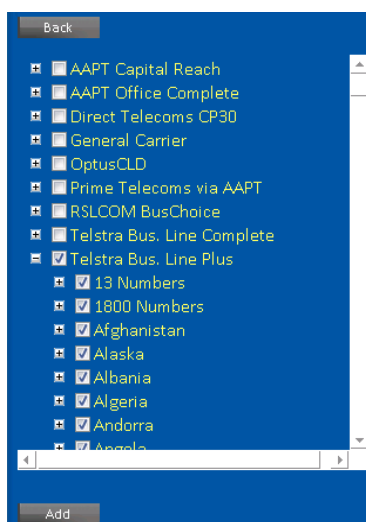
3.3.17   Completion Code

When integrated with CCS Desk and Completion Code is used, CCS Report can filter the calls based on the **completion codes**. Click 'Completion Codes' and simply tick the required codes. You can also 'Exclude Items' selected.
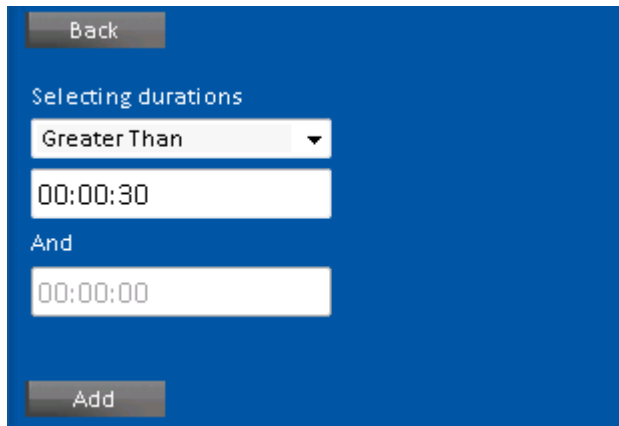
3.3.18   Directory

On the Directory tab of a filter, queries are based on the directory structure of the organisation configured in CCS Report Directory. The tree forms the directory, with check boxes against the groups, people, extensions, account codes, and authorization codes. Tick the items to be reported

In the example below, we are selecting Biil's extension from the Sales group, and every item in Technical group. The selected item and all sub items will have a check box containing a tick beside them. Parents to a checked item will have their check boxes given a grey background; however, this does not indicate that they are disabled.

3.3.19 Duration

Calls can be filtered based on their **Duration**. This filter requires one boolean operators and specific *hh:mm:ss* values.

3.3.20 Email / SMS
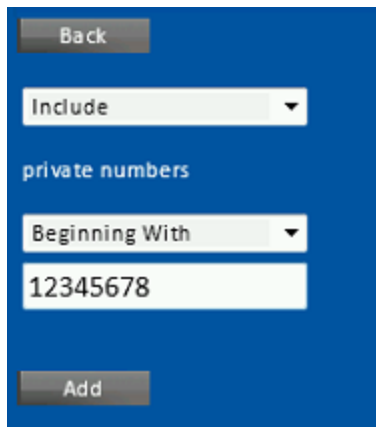
When integrated with CCS Console, CCS Report can filter the **SMS**, **Email**, and **Print** transactions generated performed using CCS Console. The first menu defines if the call type should be **included** or **excluded**. The second menu defines the transaction type.

3.3.21　　Private Number
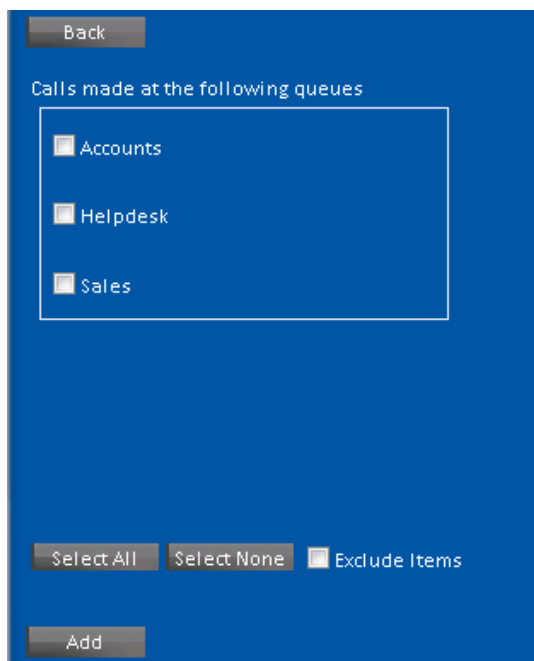
CCS Report administrators are able to import a list of private and busines numbers, and calls can be filtered based **Private Numbers**. This filter requires one boolean operators and specific numeric values.

3.3.22　　Queue

When integrated with CCS Q or CCS Call, CCS Report can filter the calls based on the **campaigns**. Tick the required queue. You can also 'Exclude Items' selected.
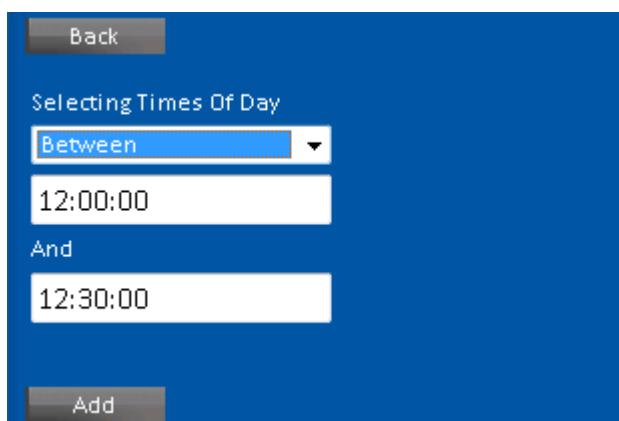
3.3.23   Site

CCS Report can be used as a centralized reporting system for multiple sites / PABXs. Calls can be filtered based on the **Sites**. Tick the required site. You can also 'Exclude Items' selected.

3.3.24   Times of Day

Calls can be filtered based on the **Times of Day** that the call was made. This filter requires one boolean operators and specific *hh:mm:ss* values.

3.3.25   Trunk Group

Calls can be filtered based on the **Trunk Groups** configured in CCS Report. Tick the required trunk group. You can also 'Exclude Items' selected.
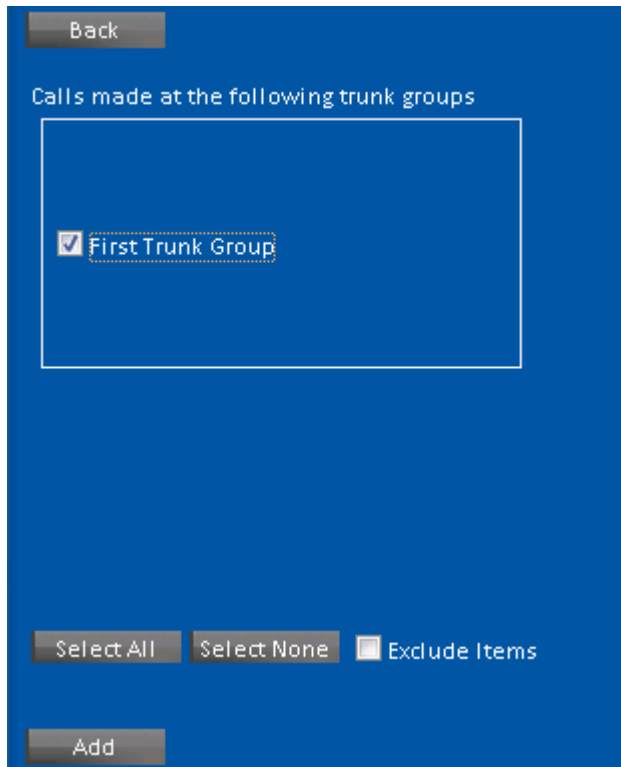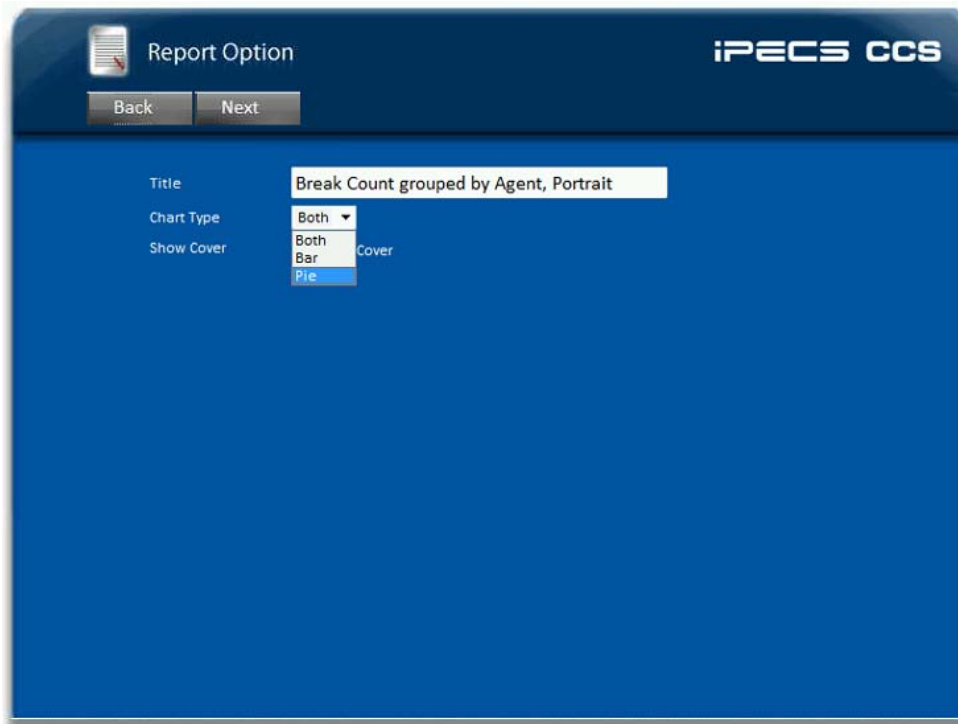
3.3.26   Trunk Line

Calls can be filtered based on the **Trunk Line** number. This filter requires one boolean operators and specific numeric values.
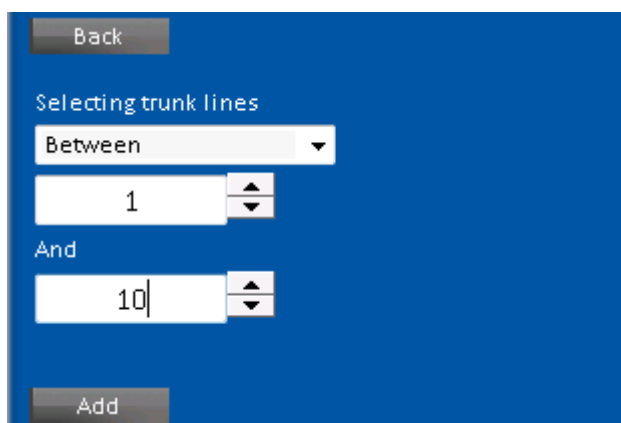
3.4   Report Options – Step 2

Step 2 allows us to create a title for our report – and also select any report options that may be available.

We will select a 'Both' in this instance.

Click 'Next' to Continue.

3.5 Report Viewer – Step 3

Your Report is Ready! Your Report is displayed to the screen providing you with further options.
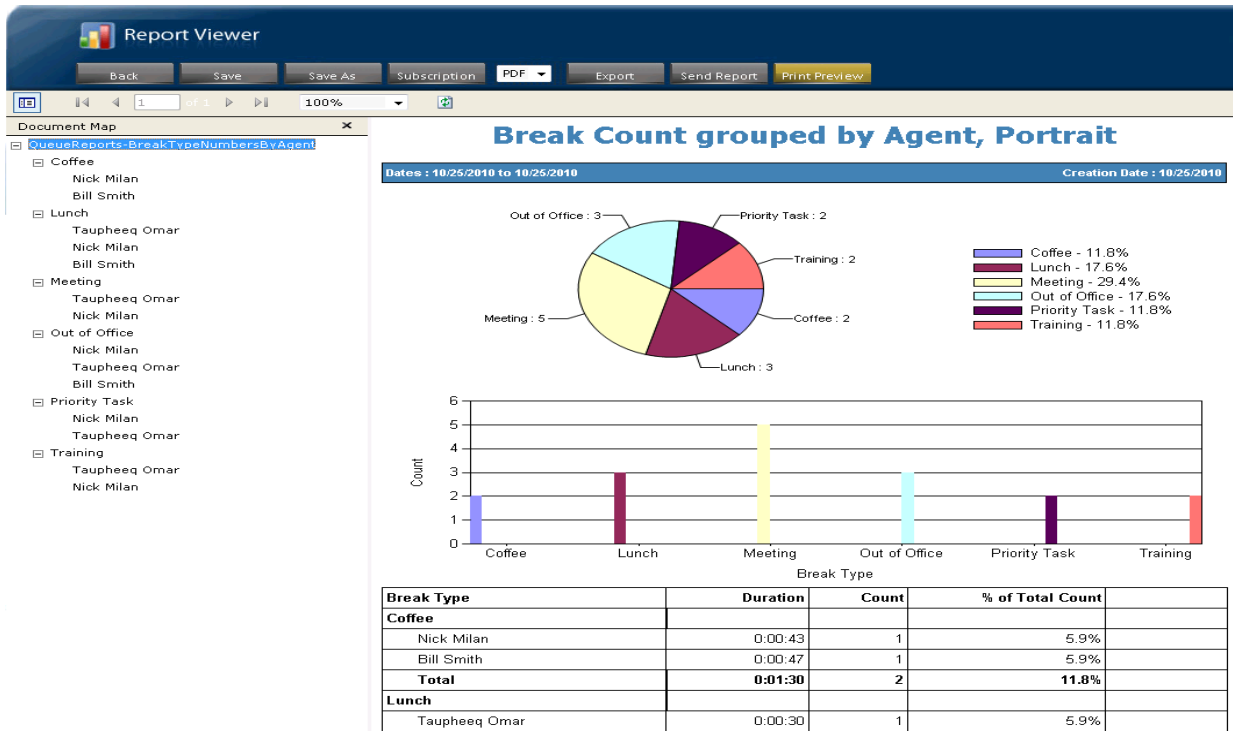
You can print, email, or output to PDF, Excel and many more formats.

By Clicking on the Back Button at the top left of the screen you can go back and edit selections you have made.

By clicking on the 'Save' Button on the top left hand corner you can save this report to your 'My Reports' categories on the main command screen of CCS Report.

These options will be discussed in more details below.

3.5.1 Save Options

Once a report has been run, the report template with the selected criteria can be saved for
future use. The 'Save' or 'Save As' button on the Top menu allows a user to save the report to
a specified folder.
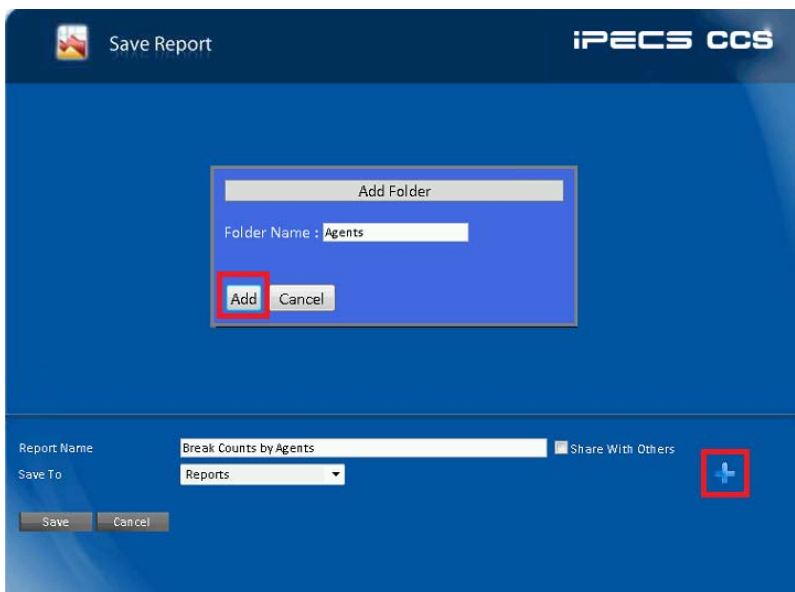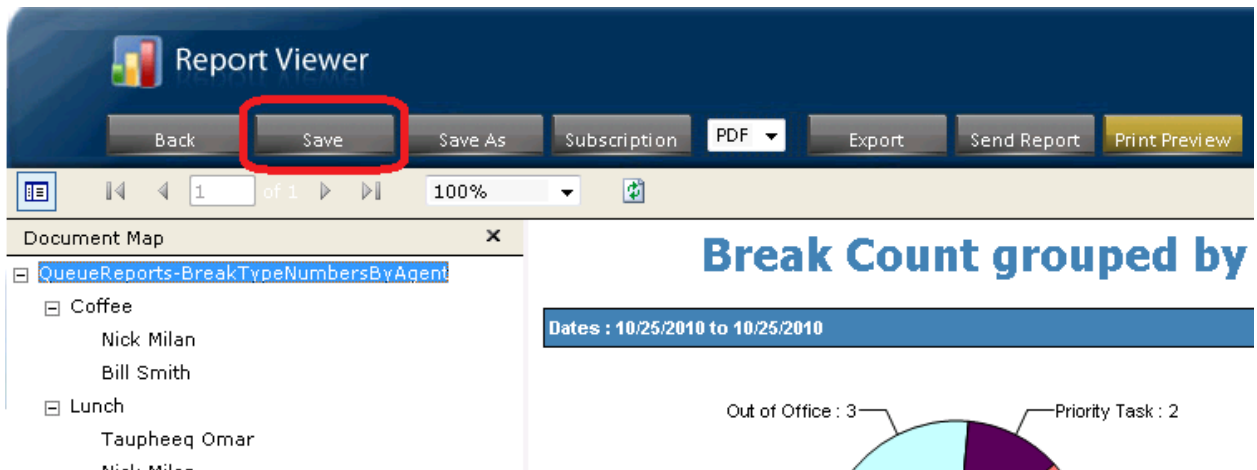
Report Templates can be saved in the generic Reports or under a Specified Folder for ease of
use and identification in the case of multiple users or categories.
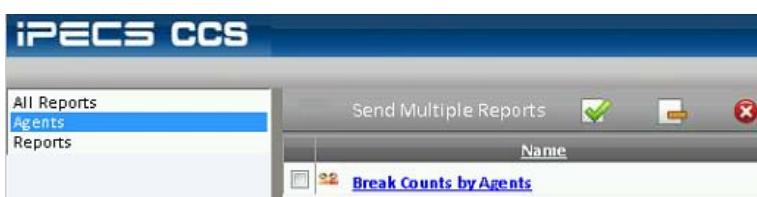
3.5.2   Subscription

Once a Report Template is saved, CCS Report Web allows users to subscribe to the report based on a defined schedule. Below we will look at an hourly schedule to be emailed to a recipient.
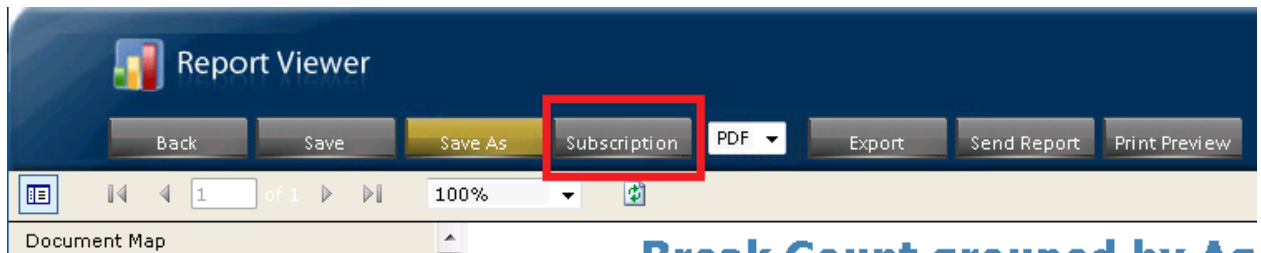
To Setup a report Subscription, Open a saved report template and Click on 'Subscription'

3.5.3   Mail Setting

Before a Subscription can be enabled, the following CCS Report Settings must be configured first. On the main CCS Report Web Interface, click on 'Settings'.
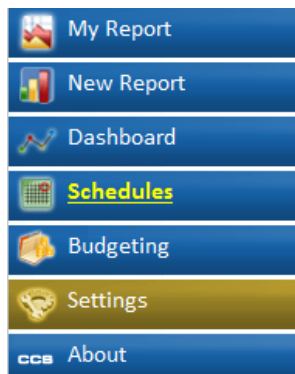
Select 'Mail Settings' from the list on the right hand plain.
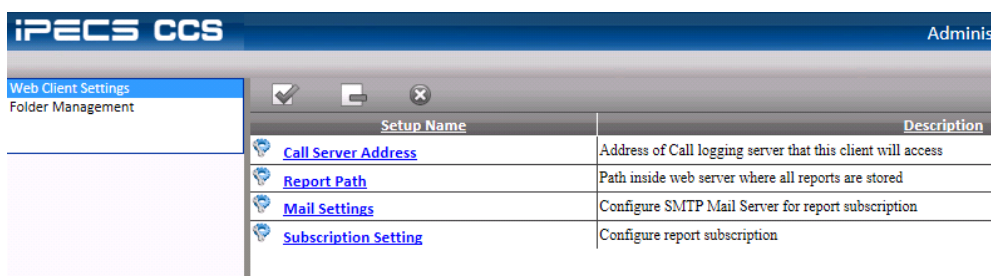
Enter your SMTP details and user name and password. There is also a facility to test the SMTP settings.
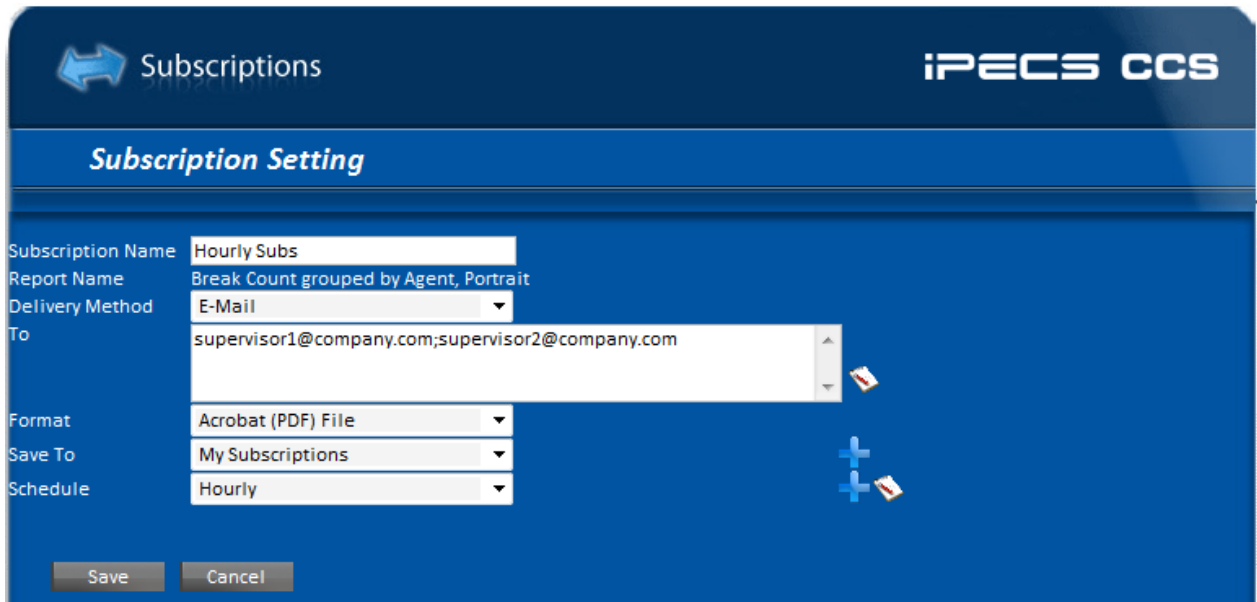
3.5.4   Subscription Setting

Specify the folder location for file storage and from address for emails. There is a feature to test the folder access to ensure CCS Report Web to create subscription into that folder.

3.5.5 Subscription Settings

Once the mail settings and subscription settings is entered correctly, the saved reports can now be subscribed. Simply open a saved report template and click on 'Subscriptions'.
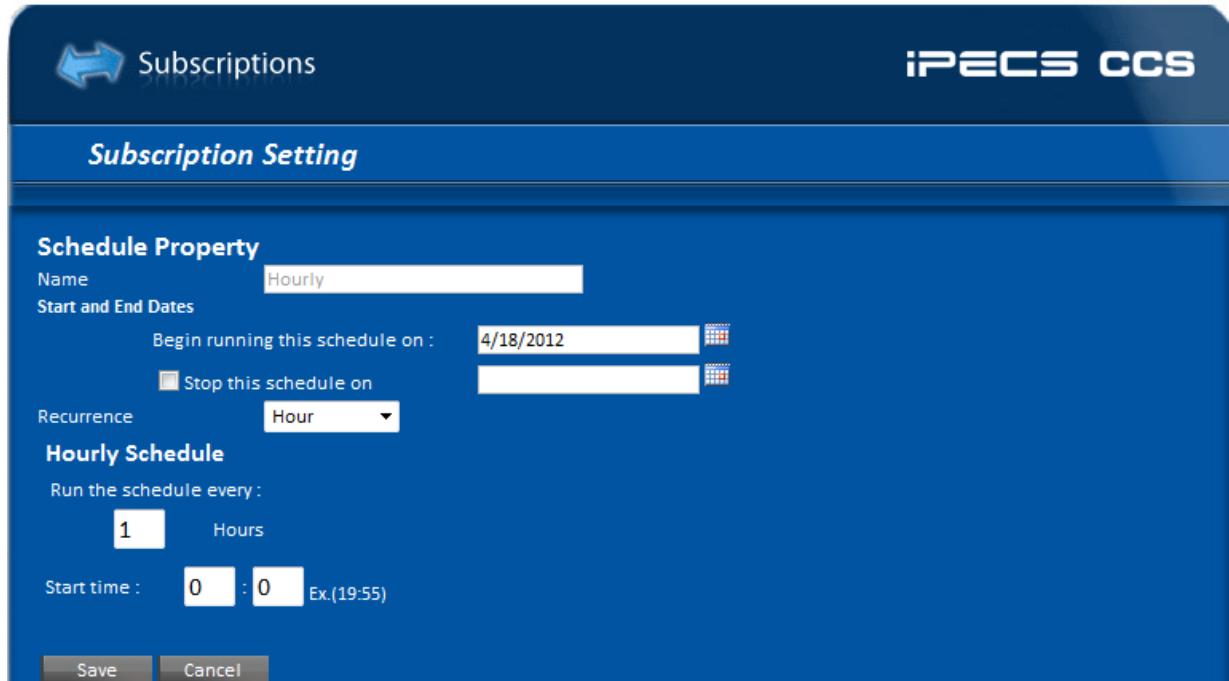

3.5.6 New Subscription Folder

Subscriptions can be saved to individual users' folders for ease of use and identification.
Simply click on the plus (+) sign next to the 'Save To' option and create a new folder.

3.5.7 New Schedule

New schedule can be added at the time of subscription by simply clicking on the plus (+) sign next to the 'Schedule' option.
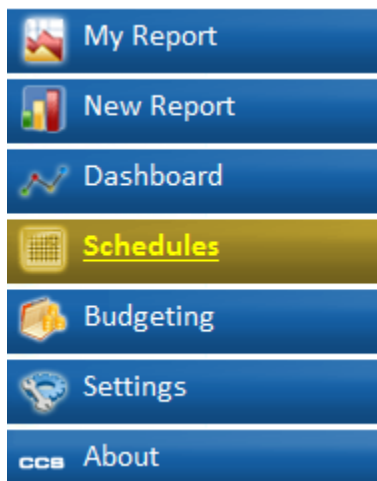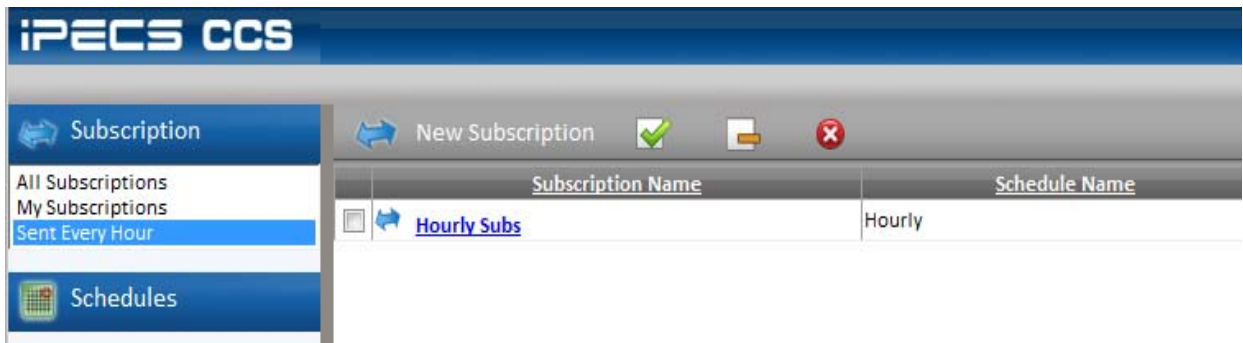

Click on save once a schedule has been specified.

3.5.8 Testing Subscription

Once a subscription is setup, it can be tested by going into the 'Schedules' options off the main Web menu.

Select the Subscription item you would like to test.

Click on 'Run Test' to ensure the mail setup is correct.
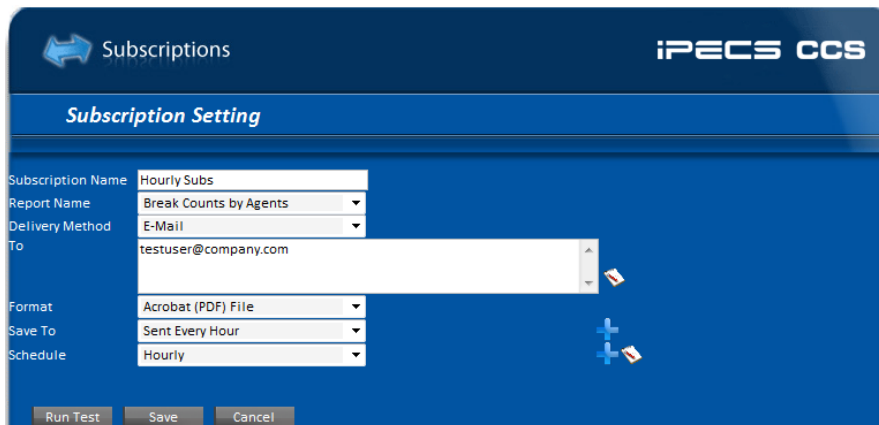
Test_Only_Break Counts by Agent

☐ CCS

[CRM] Regarding: (None)

Sent: Tue 10/26/2010 1:36 AM
To: 🔲 Taupheeq Omar

✉ Message 📄 Test_Only_Break Counts by Agent_26_10_2010_12_35_34.PDF (83 KB)

Test_Only_Break Counts by Agent

3.5.9 Export Report

Reports can be exported into PDF or Excel formats from the Report Viewer by clicking on the 'Export' button on the menu bar. Save the export to a specified location. **Warning: There is a limit of 60,000 rows which can be exported.**
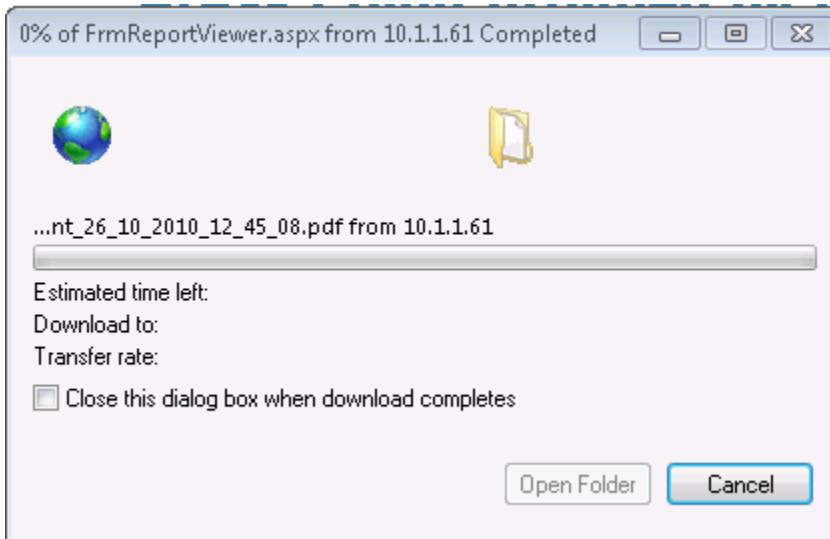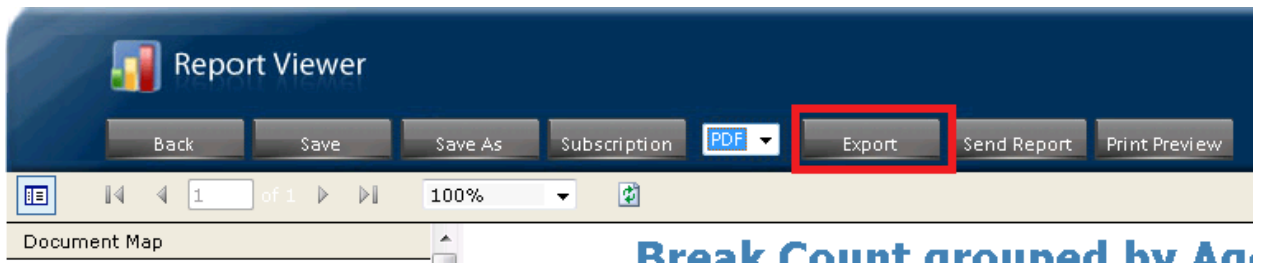
3.5.10 Print Report

A report can be printed from the report view by clicking the 'Print Preview' button on the menu bar.

3.6 Dashboard

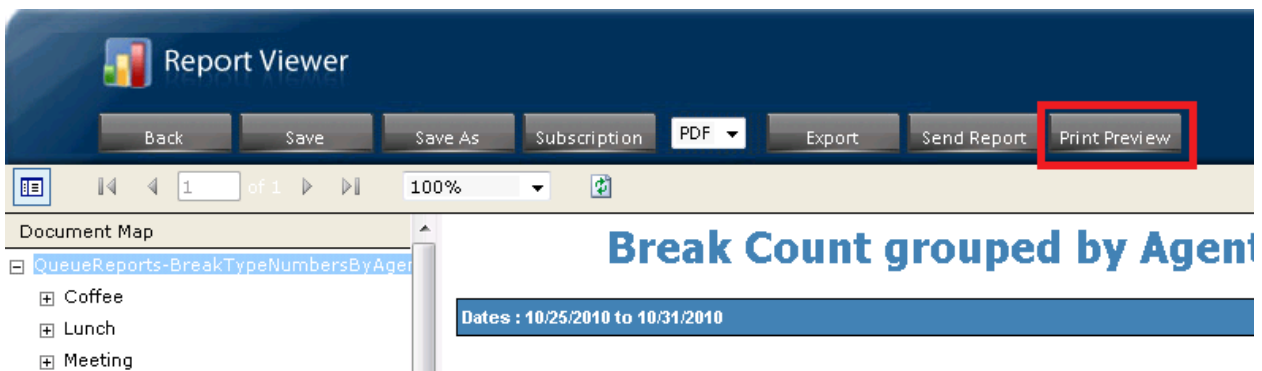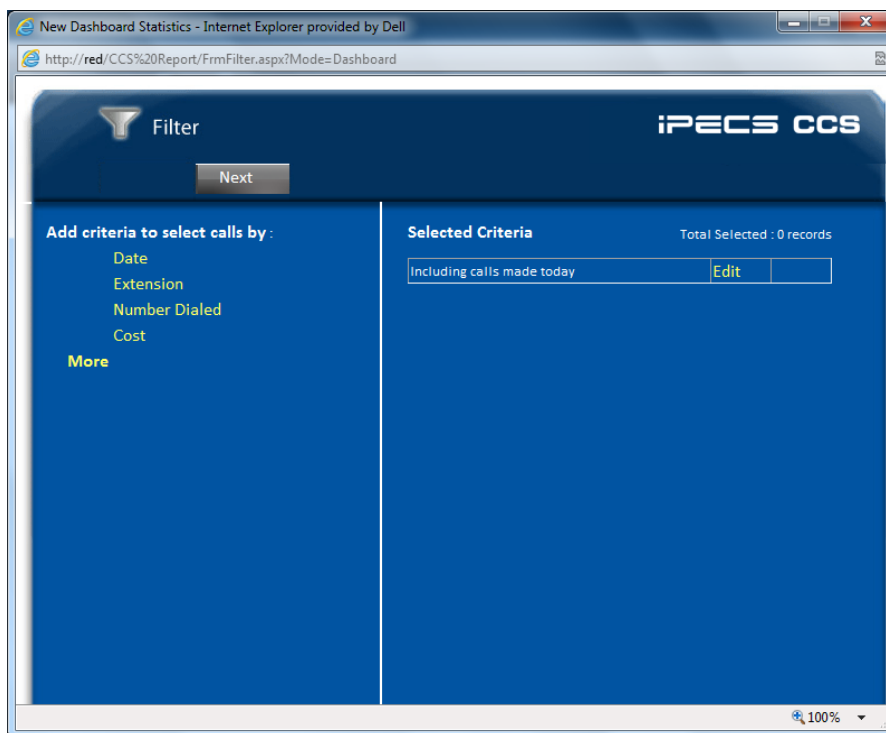CCS Report Web allows a certain report statistics to be created and made available for CCS Dashboard. To create a new statistic, enter on the 'Dashboard' section and select "New Dashboard'.

3.6.1 Filter – Step 1

The first step allows you to select from a list of multiple criterion. This process is identical to the first step in generating reports.

3.6.2 Choose Statistic – Step 2
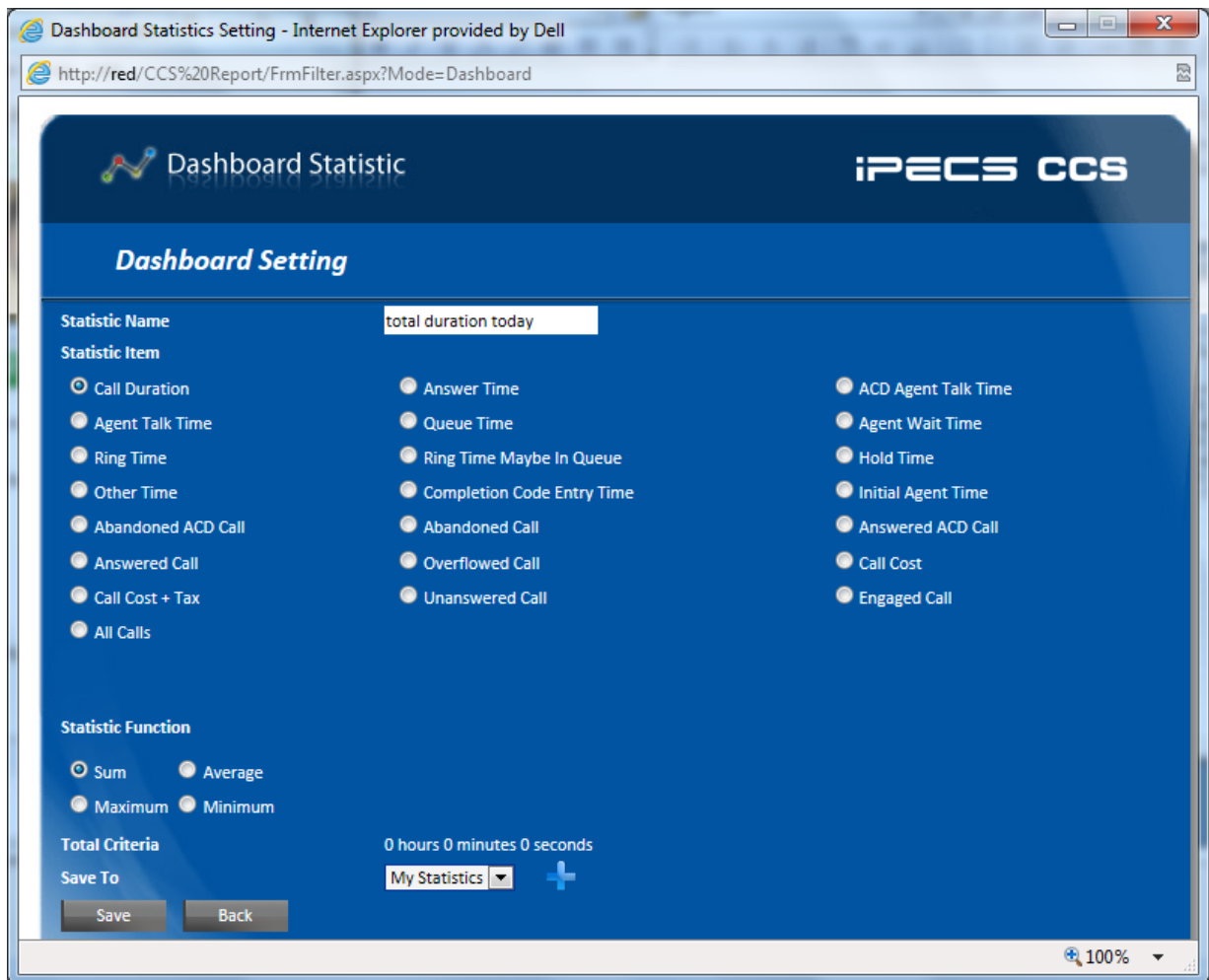
To complete the second step, the following configuration must be completed:

Statistic Name - the name of the statistic. This is what CCS Dashboard will see.

Statistic Item – choose the statistic to report from the list of statistics items available.

Statistic Function – determines how to calculate the records. Some statistic item may only have 'Sum' to choose from.

Once completed, click 'Save' and the CCS Dashboard should be able to use this new statistic.

4. Using CCS Dashboard

4.1   File Menu

New – create a new Dashboard canvas, and set the 'Configuration File Settings' in Options to default to local configuration file when the Dashboard is reopened.

Open – open a saved XML local configuration file. Use the explorer window to find the file.

Save As … – save the current Dashboard layout into an XML local configuration file.

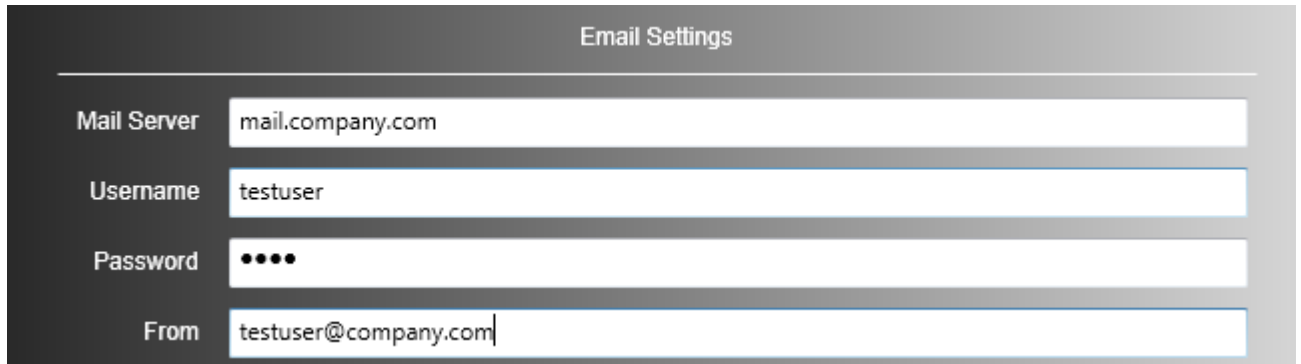**Save** – overwrite the opened XML local configuration file.

New Global File – create a new Dashboard canvas, and set the 'Configuration File Settings' in Options to default to global configuration file when the Dashboard is reopened.

Open Global File – open a saved global configuration file.

Save As Global File – save the current Dashboard layout into a global configuration file.

Save Global File – overwrite the opened global configuration file.

4.1.1   Email Setting

Configure the email server settings to be used for email notifications.

Mail Server – address of the SMTP email server.

Username – the SMTP user account.

Password – the password to the user.

From – the sender's email address.

4.2 Options Menu

Hide Menu –hide the top menu. Once hidden, the menu can be shown again by right clicking on the empty area of the canvas and select 'Show Menu'

File Options Add Group

Status Bar – show or hide the status bar. The status bar shows the current state of the Dashboard, the configuration file opened, the software version, and the main data source it connects to.

Dashboard Stop - C:\Program Files\CCS\CCSDashboard\Default.xml   - Ver.6.0.1.0 (20)   Connected to localhost

Full Screen – maximize the Dashboard canvas to full screen.

Auto Run – when enabled, the Dashboard will auto-run the most recent local/global configuration file as soon as it launches.

Snap to Grid – enable / disable the snap function.
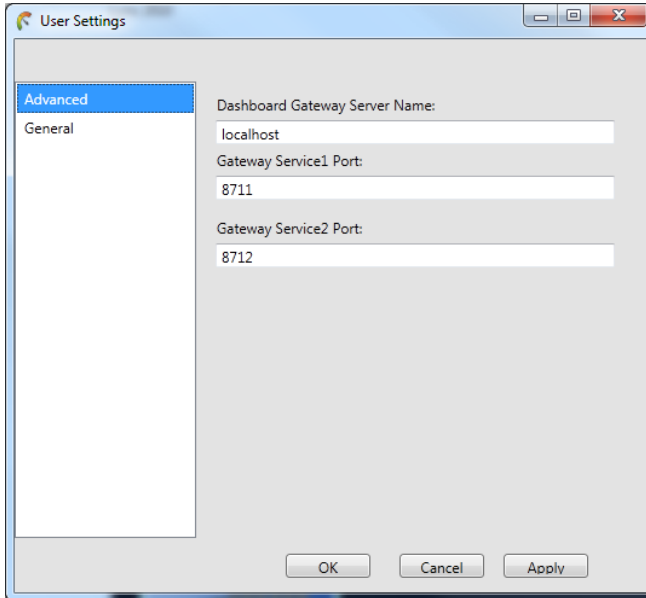 **Snap to Grid** – activates the grids.
  Snap to Grid Size – change the size of each grid.
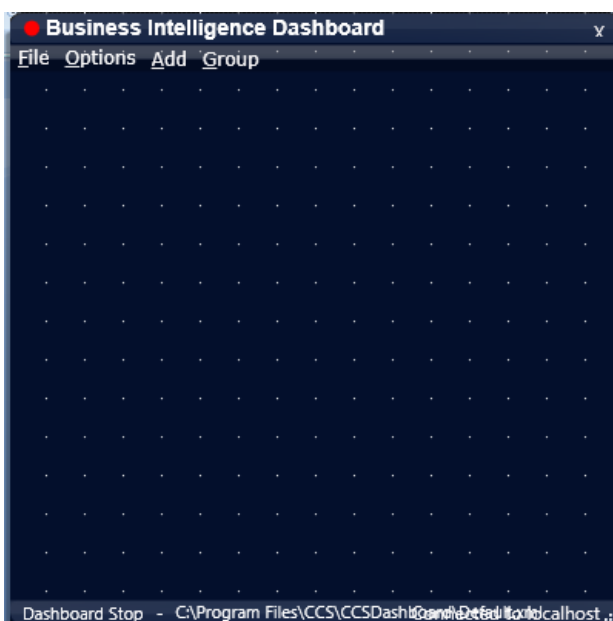
4.2.1 Options

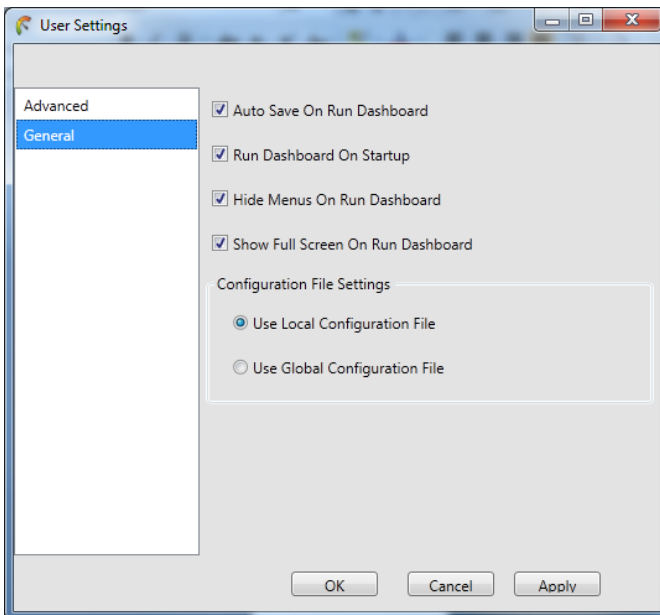Open the 'User Settings' configuration screen.

Advanced

Dashboard Gateway Server Name – the name of the machine that hosts the CCS Dashboard Gateway service

Gateway Service1 Port – must always be set to 8711.

Gateway Service2 Port – must always be set to 8712.

General

Auto Save on Run Dashboard – automatically saves the configuration before the dashboard enters 'running' mode.
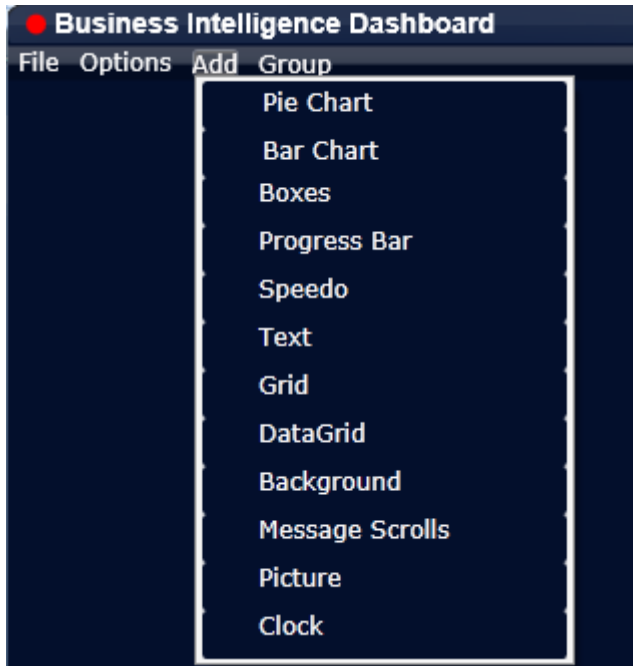
Run Dashboard on Startup – enable this to start Dashboard when Windows starts.

Hide Menus On Run Dashboard – hide the top menu bar when the dashboard is running.

Show Full Screen On Run Dashboard – maximizes to full screen when Dashboard runs.

Configuration File Settings – choose to use a Local configuration XML or a global configuration file.
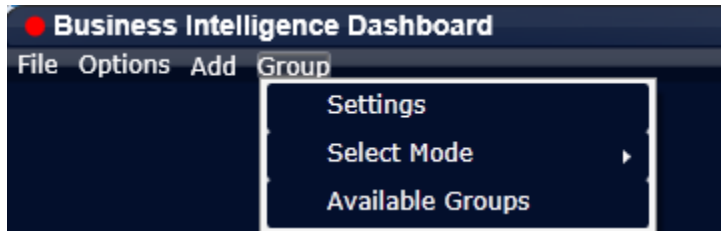
4.3   Add Menu

This gives a list of objects that can be created in the Dashboard. The new object is automatically added into the canvas once selected. Details about each object will be discussed in later section.
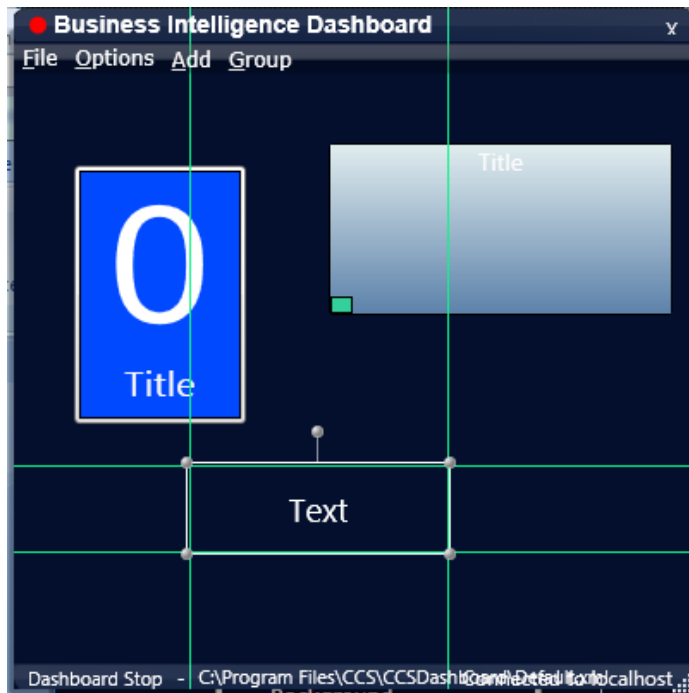
4.4 Group Menu

Settings – currently only one setting is available in this section.

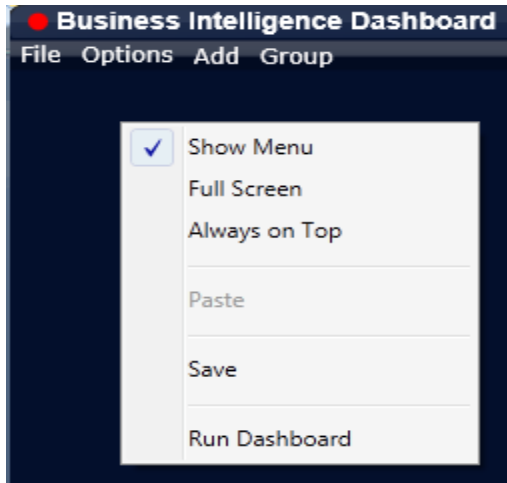   **Delete All Objects** – when checked and then OK, it will erase all objects in the Dashboard canvas.

Select Mode – choose the grouping mode.

   Group – group all selected objects into a group

   Un-Group – remove the objects from any association to a group

Available Groups – show a list of groups created.

4.5 Canvas Menu

By right clicking on the empty area of the canvas, there are several options that can be selected.

Show Menu – restores the top menu once hidden.

Full Screen – activates the full screen mode

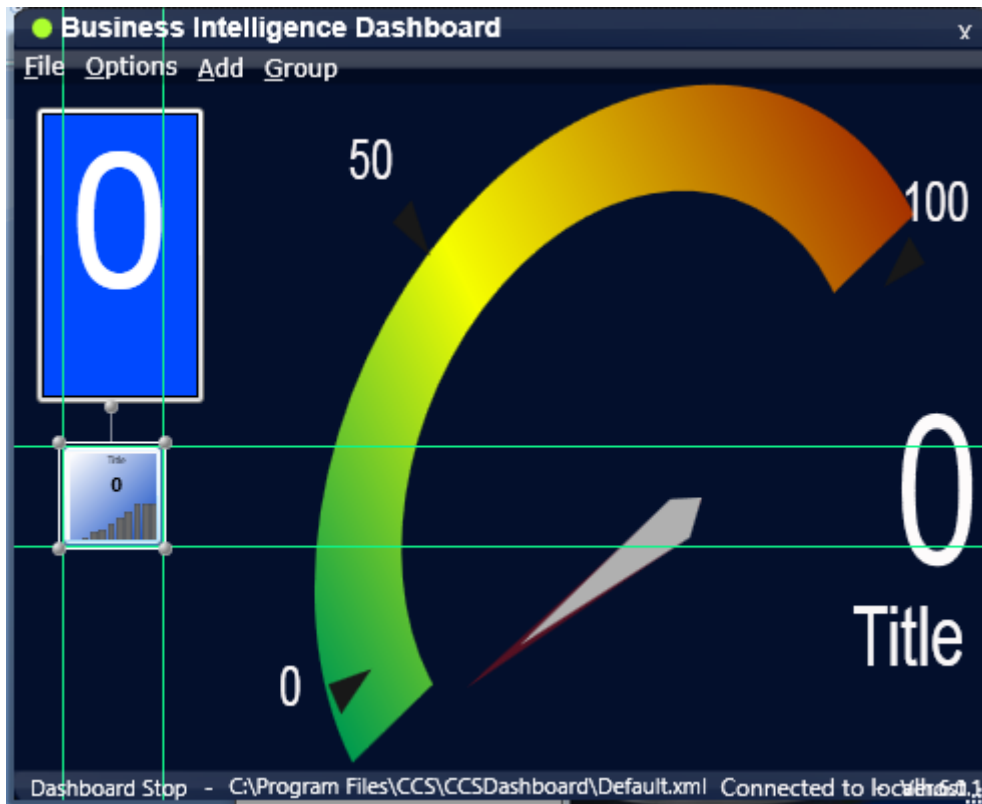**Always on Top** – keeps the Dashboard on the foreground at all times.

Paste – creates a copy of an object. The object must first be copied.

**Save** – saves the current Dashboard layout into local configuration file.

Run Dashboard – locks the design and activates the Dashboard to start collecting statistics.

4.6   CCS Dashboard Objects

4.6.1   Overview

Managing objects on the Dashboard canvas are very simple. Objects can be moved by drag-and-drop, and there are guidelines to assist the positioning of the objects. Objects can also be stretched by using the control on the edges of the object. The 'title' for each object can be edited using the 'Set Style' configuration.
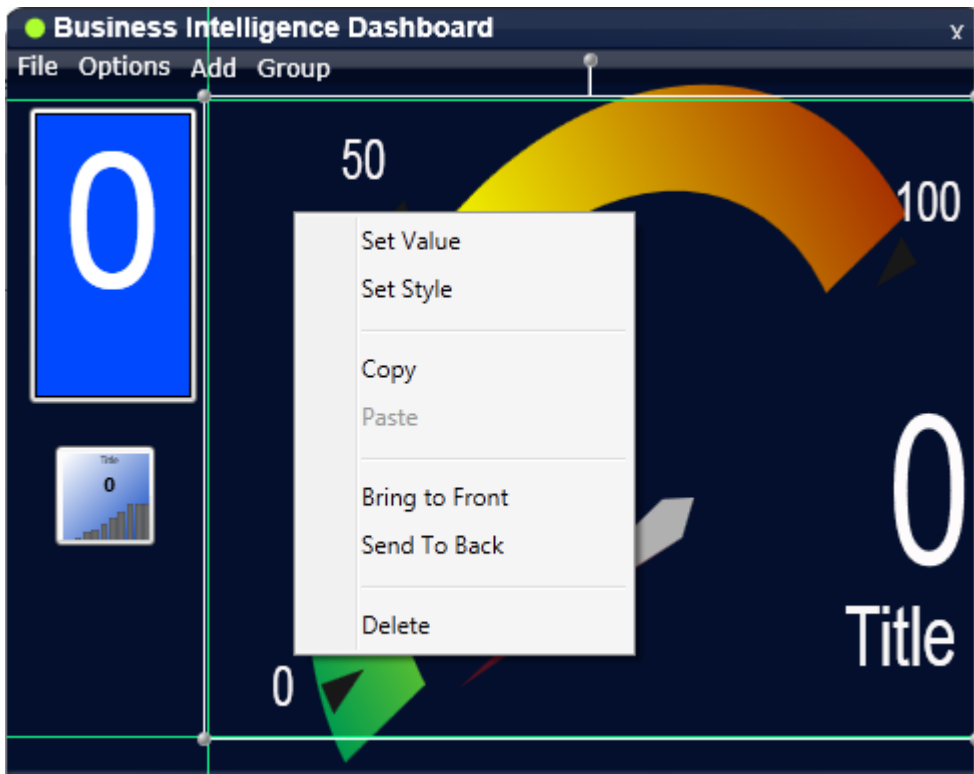
Right click on an object to several menus related to the object.

Set Value – modify the data and threshold settings for the object.

Set Style – modify the style settings for the object. Note that style is not supported in some objects.

Copy – create a copy of the object, which can be pasted to an empty area on the canvas.

Paste – paste the copied object.
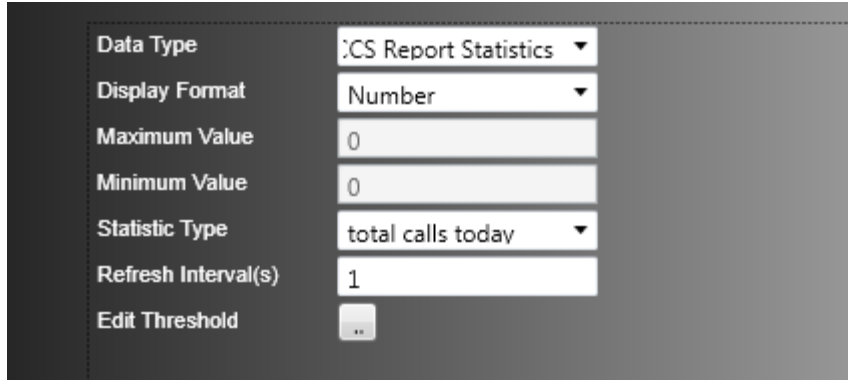
Bring to Front – adjust the Z value of the object, bringing the object on top of other overlaying objects.

Send to Back – adjust the Z value of the object, pushing the object behind other overlaying objects.

Delete – delete the object from the canvas.

4.6.2   Set Value

Although some objects do not have identical settings for their 'Set Value', below is a typical configuration screen for objects that display data.

Data Type – there are 4 possible data types to choose from.

   Agents – connects with CCS Desk to obtain real-time agent information.

   Queues – connects with CCS Desk to obtain real-time queue information.

   CCS Report Statistics – connects to CCS Report and run the statistics created with CCS Report.

   Custom Statistics – connects to an ODBC data source to run a query or stored procedure

Display Format – there are 4 display modes available.

   Number – basic numeric value e.g. 303.

   Percentage % - adds the percentage symbol to the value.

   HH:MM:SS – assumes the value is in seconds and converts it to hours, minutes and seconds.

   MM:SS – assumes the value is in seconds and converts it to minutes and seconds.

Maximum Value – set the upper limit, applicable when the object contains a gauge e.g. Progress Bar and Speedo.

Minimum Value – set the lower limit, applicable when the object contains a graph e.g. Progress Bar and Speedo.

Statistic Type: Agent – Select one of the statistics in the list then click on the three dots (…)

button to select the CCS Desk agents to be monitored.
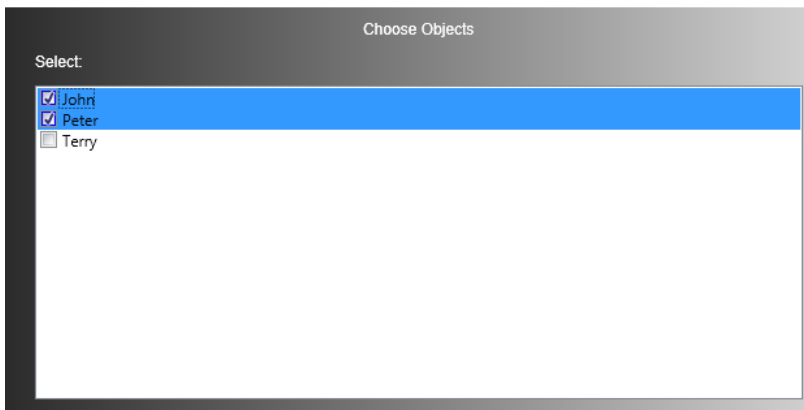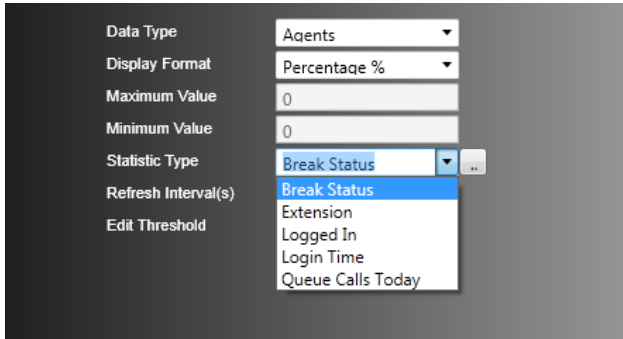
Statistic Type: Queue – select one of the statistics in the list then click on the three dots (…)
button to select the queue to be monitored.
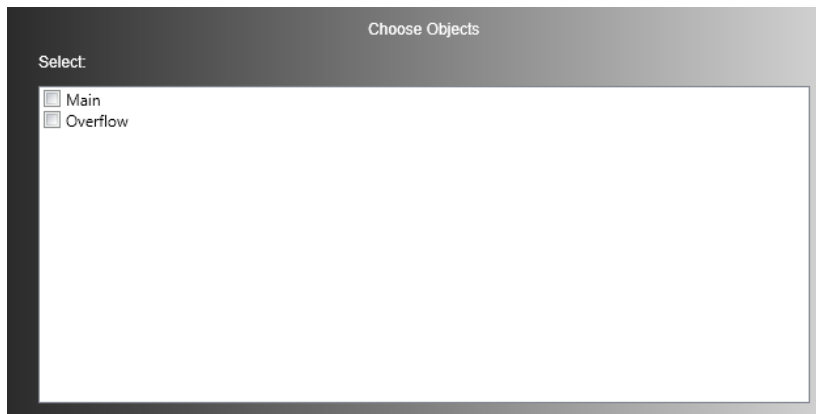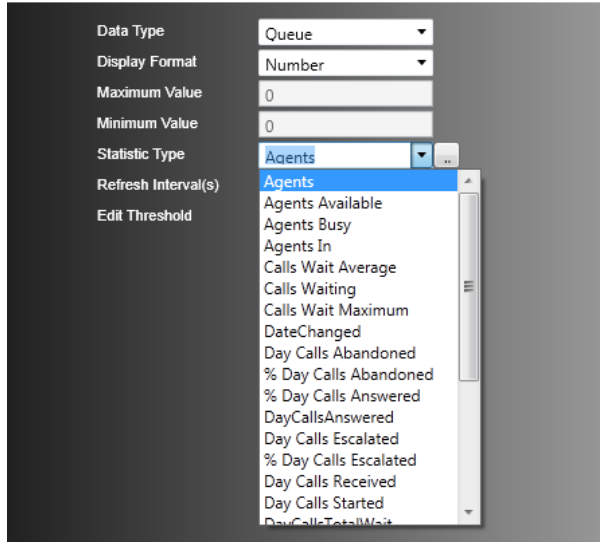
Statistic Type: CCS Report Statistics – select one of the CCS Report statistics in the list.

Data Type	CS Report Statistics ▾
Display Format	Number ▾
Maximum Value	0
Minimum Value	0
Statistic Type	total calls today ▾
Refresh Interval(s)	1
Edit Threshold	..

Statistic Type: Custom Statistics – select the configured ODBC data source from the list then click on the three dots (…) button to configure the custom query.

Custom Query

Query Generator
Select Stored Procedure

Param Name	Param Type	Param Value

Generate Query

Or Type your custom query

select count(*) from tbldirext

Refresh Interval(s) – specify how frequent the Dashboard should check for new update on the statistic selected.
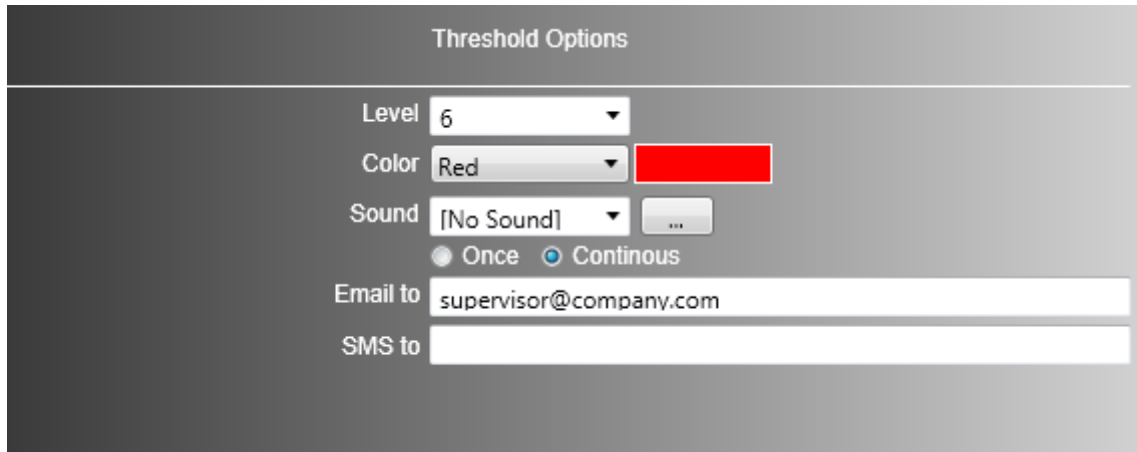
Edit Thresholds – configure alert and notifications when a particular value has been reached in this object. To enter the threshold configuration screen, click on the three dots icon (…).

There is no limit to the number of thresholds that can be added per object. The value that must be met can be modified by clicking on it. Each level serves as a 'greater than' range to the level above it.

In this example, the color of the object will be blue if the value is >= 0 and < 10.
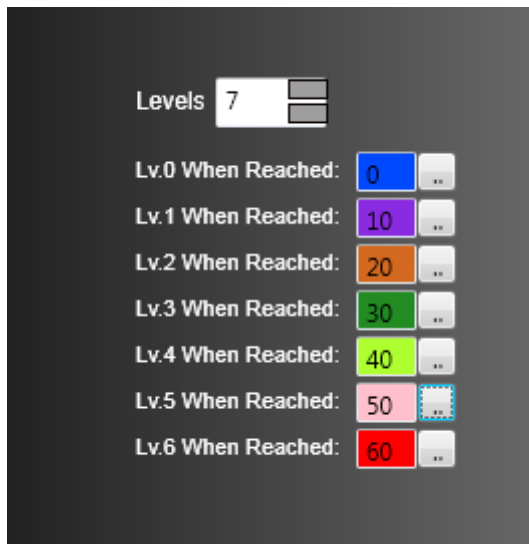
There are other actions that can be performed when a level is reached. Click on the three dots (…) icon beside a level to open the configuration screen.

Color – change the color of the object.

Sound – play an audio file once or continuously. The file can be selected from using the three dots (…) icon next to it.

Email to – an email notification can be sent to a destination. The email will also contain the statistic type set to the object and level / value reached.

SMS to – an SMS notification can also be sent. This requires CCS SMS module.

4.6.3   List of Objects and Styles
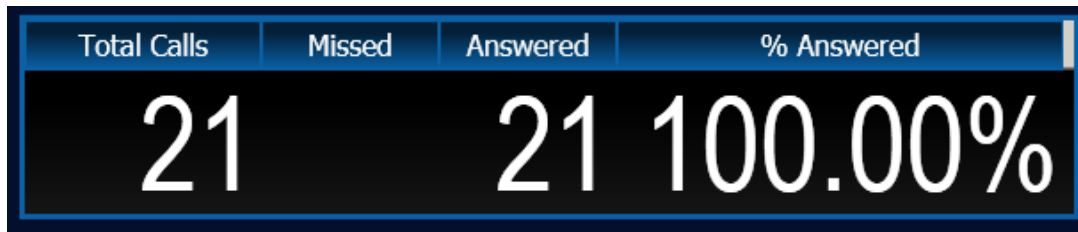
Pie Chart

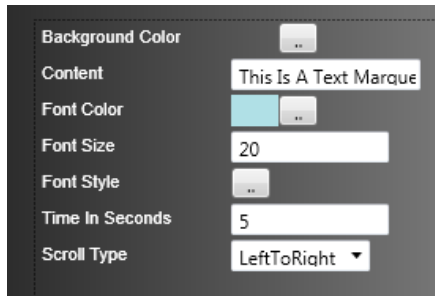Bar Chart

Boxes

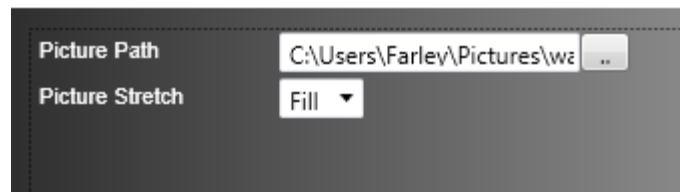Progress Bar

Speedo

Text

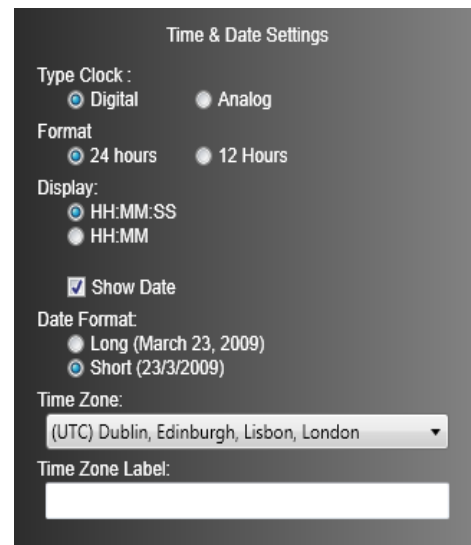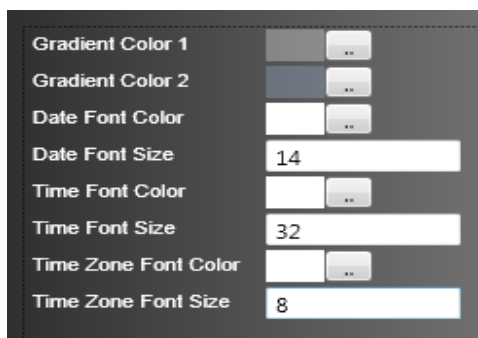Grid

Data Grid

Background

Message Scrolls

Picture

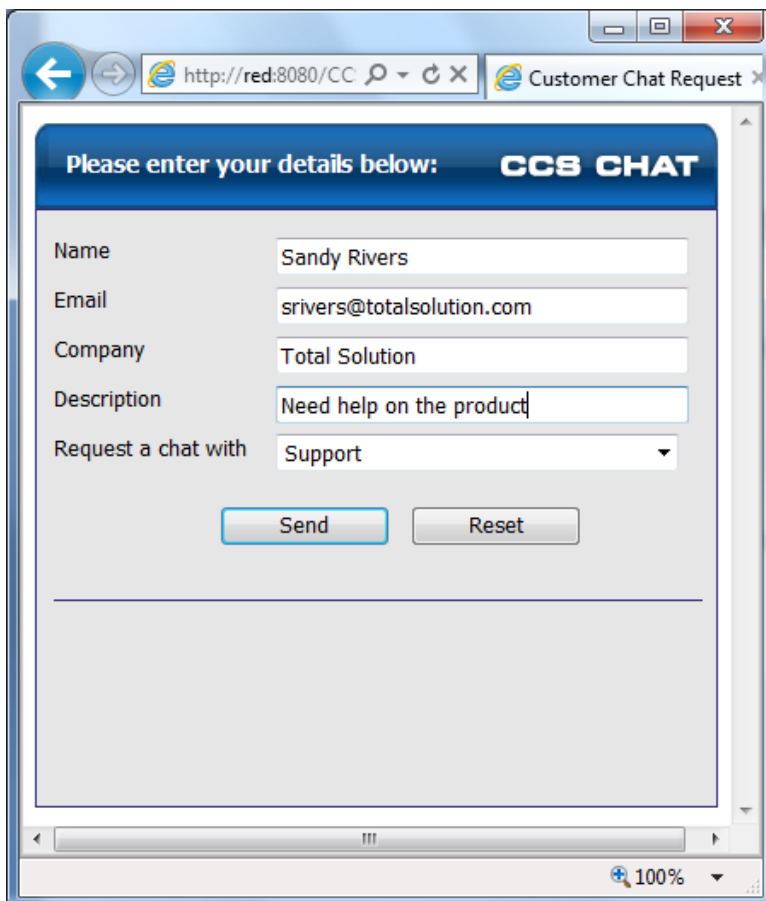

Clock

5. Using CCS Chat

5.1 Customer Page

The Customer Page is where chat request is created. Internally it can be accessed by adding the **CustomerPage** at the end of the CCS Chat URL.

For example: **http://red:8080/CCSChat/CustomerPage**

The end-user's Web Admin will have to configure a number of settings in their IIS, website and network to make this page accessible from the internet.

To request a chat, the customer must enter complete details on all fields. They also have to select the "Chat Source" they wish to speak to.
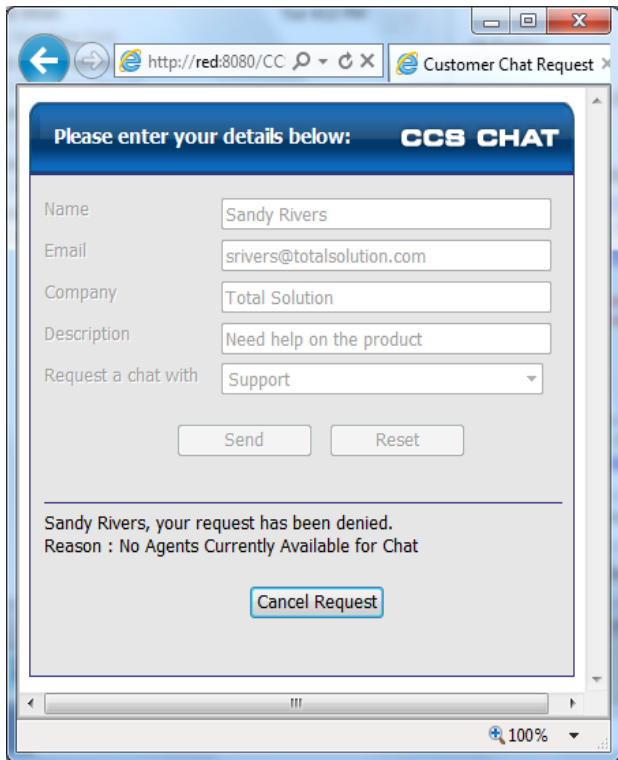
Customer will be informed when there is no agent available to handle their request or when they have to wait for an agent to become available. Chat request can be cancelled by the customer at anytime by closing the browser or hitting the **Cancel Request** button when available.

The chat conversation window is opened when an agent has accepted the chat request. Note that customer will receive the default / custom greeting message for the agent.
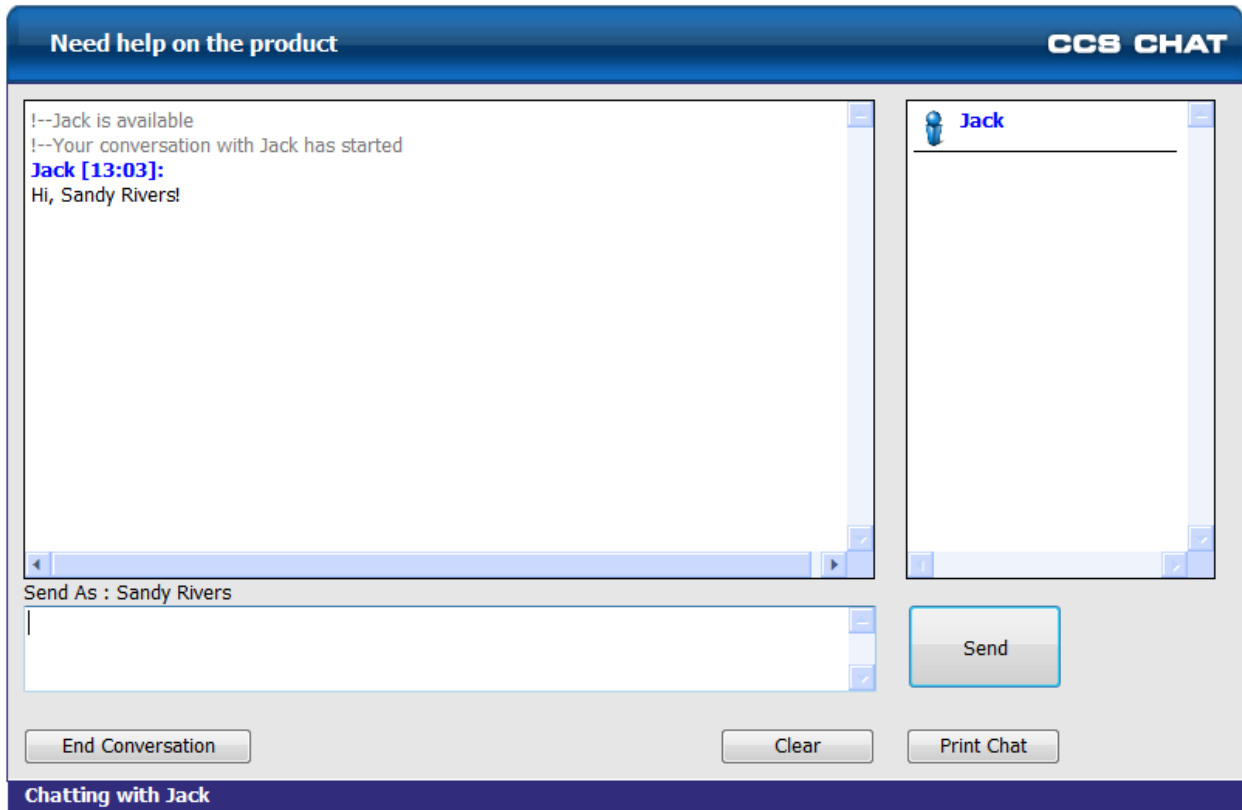
Type chat messages in the box provided and click Enter or the **Send** button.

The **Clear** button helps customer to clear the message box should they need to re-type the chat message.
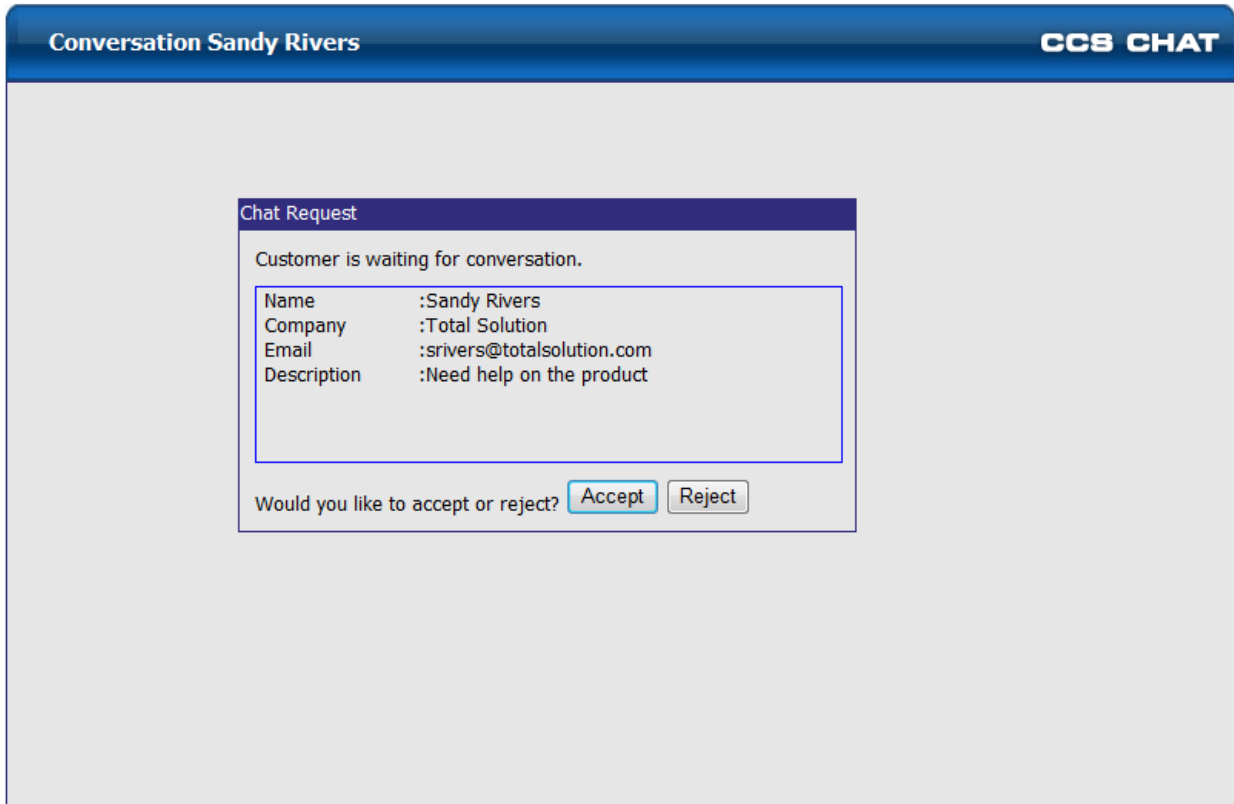
The **Print Chat** button allows customer to send the chat log to printer.

Press the **End Conversation** button to close the chat request.

Customer will also be notified when agent has left the conversation

!--Jack has left the conversation

5.2   Agent Page

This screen will pop on chat agent's screen to inform that there is a chat request in the system. They can **Accept** the request to start the chat, or **Reject** to send the call to another agent.

In this example, we are informed that "Customer is waiting for conversation" which means it is a new customer chat request. It is possible that the chat request is an invite or a transfer from another agent.
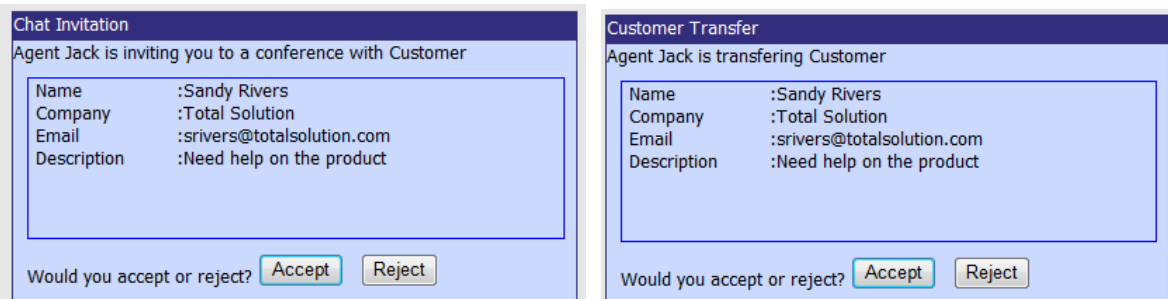
The chat conversation window is opened when the agent accepts the chat request. Note that customer will have received the default / custom greeting message sent by the system.
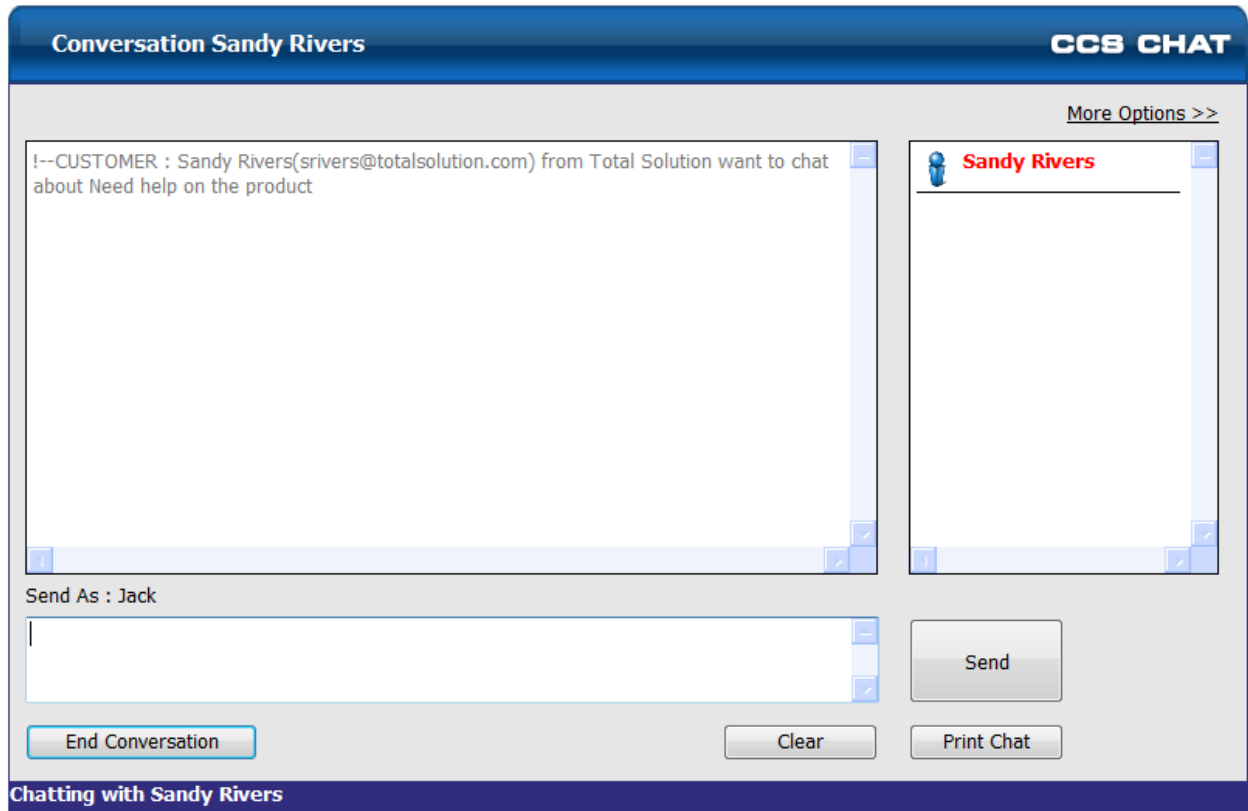
The red font indicates that Sandy Rivers is a customer, not another chat agent.

Type chat messages in the box provided and click **Enter** or the **Send** button.

The **Clear** button helps customer to clear the message box should they need to re-type the chat message.

The **Print Chat** button allows customer to send the chat log to printer.

Press the **End Conversation** button to close the chat request.

Agent will also be notified when customer has left the conversation

!—Sandy Rivers has left the conversation

The chat agent is able to view the status of the other agents by clicking on the **More Options** button. The status of agents can be shown as logged in i.e. free, logged out, busy on phone, or on break.
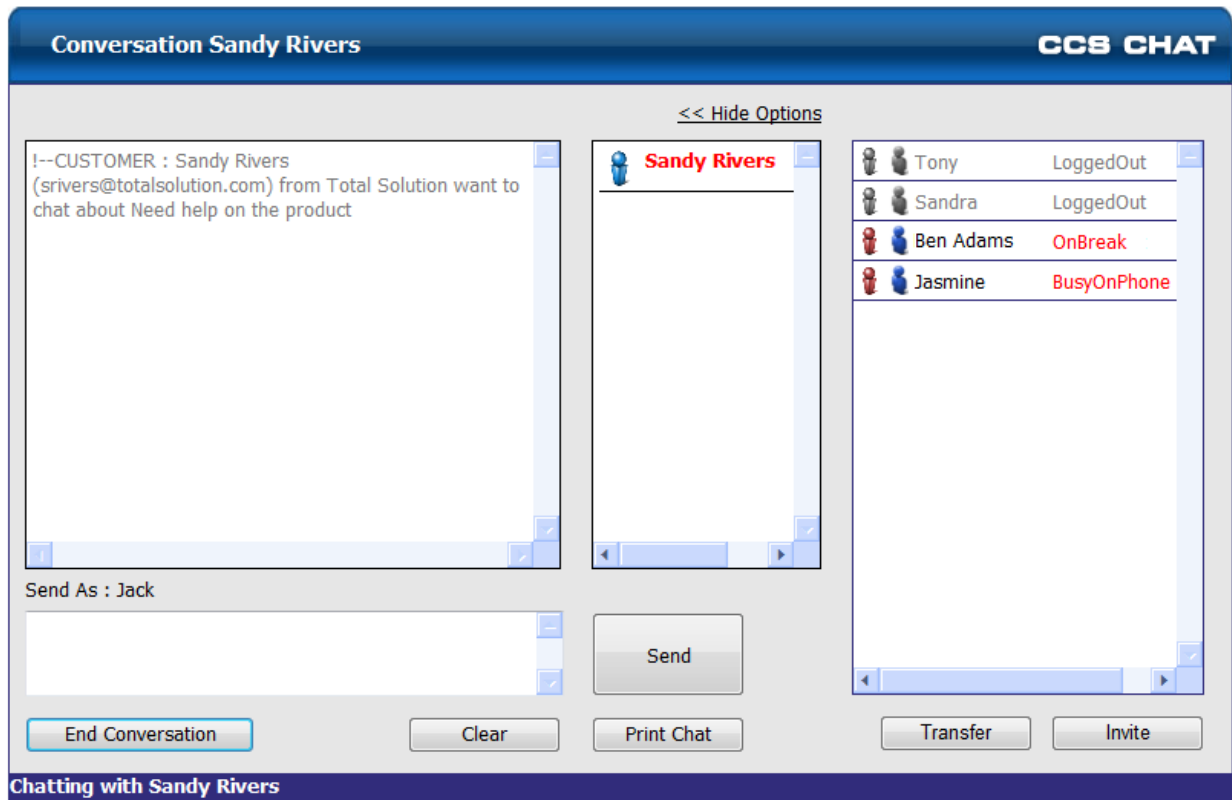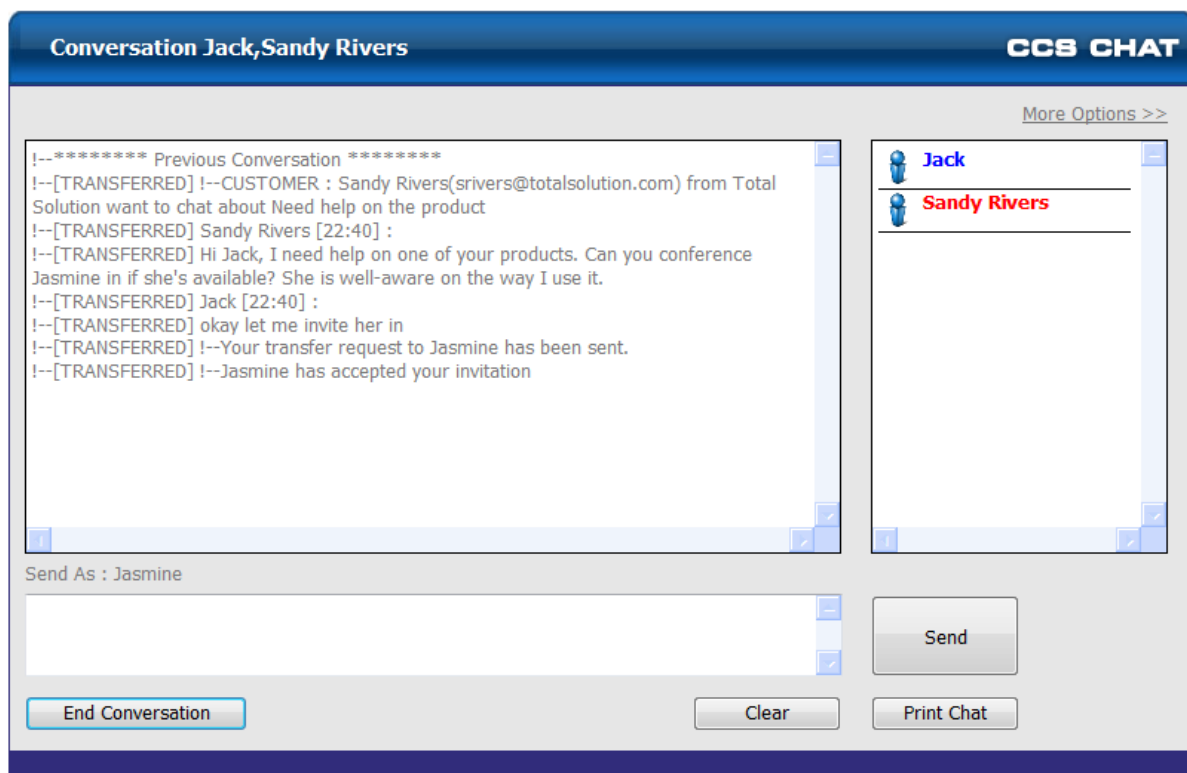

The chat agent can click on an available agent and send a request to join the conversation with either the **Invite** or the **Transfer** button.
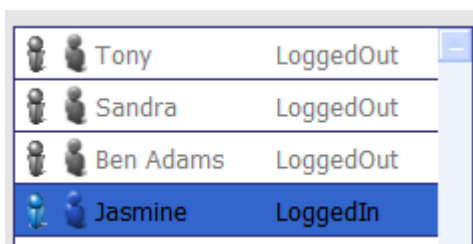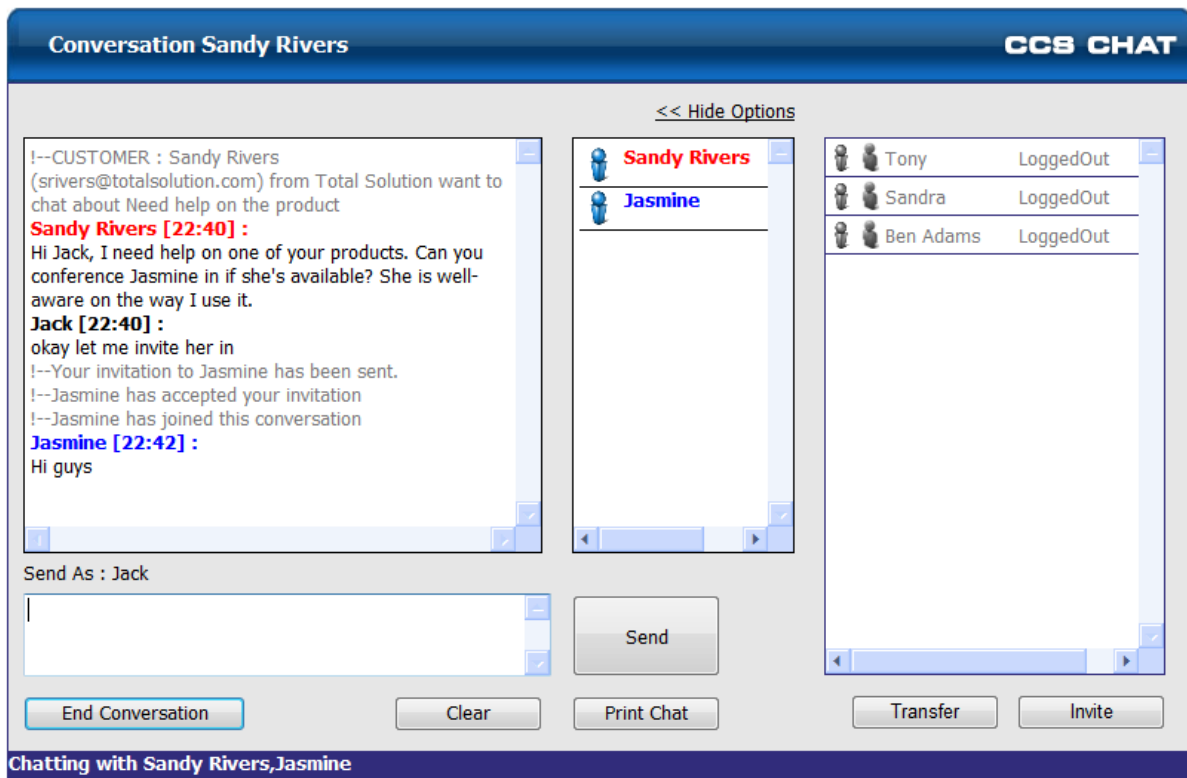
Invite is simply adds the agent into the conversation, while **Transfer** sends the existing chat transcript to the additional agent.

Transfer and Invite request can be rejected by the other agent, however, a reason must be written in the message box provided. The text is displayed only to the agent who requested the invite / transfer.

!--Your invitation to Jasmine has been sent.
!--Jasmine has declined your transfer request. Reason :
preparing a meeting

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