votacall))

VOTACALL UNITY AGENT

QUICK USER GUIDE

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1 INITIAL SETUP

Standard vs Enterprise Features

Unity Agent is available in Standard and Enterprise variants. The features available are as follows:

Unity Agent

Full call control, directory integration and service configuration [as outlined in the Unity Desktop user guide], plus:

- Agent state [available, unavailable, wrap-up]
- o Joining & leaving call centers
- Statistics for all queues that the agent is a member of [the agent's own stats and summary queue stats such as calls in queue]

Unity Agent Enterprise

All Unity Agent features but also including:

- Callback abandoned calls. Call center abandoned call remote numbers can be assigned by Unity Supervisor Enterprise for Unity Agent Enterprise to click-to-dial and marked as Processed. Note: This capability requires the customer to also be running Unity Wallboard and Unity Supervisor Enterprise
- Unity Connect API integration with third party database applications

The first time Unity is started you will be prompted to enter the configuration details, as shown below. Unity can then retain the connection and authentication details for later use. The Login ID and Password will be assigned from your Service Provider.

Broadworks Login Details	
Login ID	
Password	
✓ Remember my login ID	
 Remember my password 	

Next you will be prompted for the server address for your Service Provider. If this field is already populated do not change it. In most cases you can leave the Server Port as 2208 Leave the Unity Server Connection Details as those prefilled.

Broadworks Server Connection Details
Server address
Server port
2208
Unity Server Connection Details
Unity Server Connection Details Server address:
•
Server address:
Server address: im.unityclient.com

Restart Unity Agent to begin.

1.1 Call Center Login Details

Once Unity has been restarted it will connect to the host BroadWorks system and populate all the Call Center Instance IDs for the call centers that the agent is a member of as shown below.

ervices Settings	
Skin Contact Search Contact Display Current Calls Computer/Phone Integration — Gipboard Integration	 Specify call center authentication details. All login ids and passwords are case sensitive and each login id must include the domain.
Dialing Rule Custom Directory Integration Configuration	Default password
Outlook Integration Browser Integration	Call Center Login Details
CRM Desktop Integration Call Notification Unity Connect Quick Keys Keys Keys Communds Startup Update Instant Messaging & Presence Logging _xdepP Security Language Connection Network	v Bots Sales v Nuts Sales
- Authentication	V Alert me when a call center login fails

2 UNITY AGENT INTERFACE OVERVIEW

Unity is split into six functional areas; ACD Buttons, Call Control buttons, Personal Wallboard, Active Call Window, Contacts [Busy Lamp Field and Instant Messages]. Contacts is a tab that can be toggled to display Call Logs, Abandoned Calls and the Voicemail tab.

	ACD State	Ca Contro		Cal Recording		leports a nalytics	nd		resholds d Alerts					
	Unity Agent: Chris Tut	tt - Available (duration: 0	1.25)								-	00	×	
	File Messaging To Linesador Autor Was	Help	Reality (Derrys				E	Your Log	- go Here -]	
			My Statis	itica				0	verall Queue Stati	itica			att	
Agent Statistics		Answered tal Calls Calls	Missed C		Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Time		k.	Queue Statistics
	Engineering Sales Line	0 0	0	00:00:00	00:00	3	0	0	0	00:00	00:00	00:00		
		0 0	0	00.00.00	00:00	12	9	3	1	00:25	00.07	02:11	- 11	
Incoming	From		То			Durati	on		Status				51	Active Call Window
ACD Calls	Barry Simpson			gineering		00:00			Ringing					WINDOW
Abandoned	Barry Simpson	1 Missed) Abandoned	Eng	gineering		00.00			Ringing		My statu	i: available in c	ffice	WINdow
ACD Calls Abandoned Calls List	Barry Simpson Contacts Call Logs (्र	Eng	Department		00:00		Stati			My statu	i: available in c	ffice	Window
Abandoned	Barry Simpson Contacts Call Logs (Search Name A Abin Jose	e e	Eng							18 November 1			fice	Wildow
Abandoned	Barry Simpson Contacts Cat Logs (Search Name & Abin Jose & Abin Joseph	P1 83 83 83	Calls cone 111 135	Department		ACD State Sign-Out		Lam	a		4.09 unlit furthe		ffice	Window
Abandoned Calls List	Barry Simpson Contacts Call Logs (Search Name & Abin Josep & Abin Josep & Abin Josep	PP 83 83 00	Eng Calls Inne 111 135 1082381258			ACD State Sign-Out Sign-Out		Lam	is in a meeting from		4.09 unlit furthe		flice	Wildow
Abandoned Calls List Agent and	Barry Simpson Contacts Cat Logs (Search Name & Abin Jose & Abin Jose & Abin Jose & Abistar Tod	PT 81 83 01 01 01	Calls cone 111 135	Department		ACD State Sign-Out		lam Iam	is in a meeting from out to lunch from		4.09 unlit furthe		flice	
Abandoned	Barry Simpson Contacts Call Logis (Search Name A Adm. Jose A Adm. Joseph A Adata Todd A Andrew Simth A Andrew Todd	PR 82 83 00 00 00	Eng Calls 111 135 1082881258 1173700075	Department		ACD State Sign-Out Sign-Out Unavailable - Cles		Lam Lam Dor	is in a meeting from out to lunch from : not disturb	20 May 12:25 un	4.09 unlit furthe		ffice	
Abandoned Calls List Agent and	Barry Simpson Contacts Call Logs (Station R. Alon Josep & Alon Josep & Alon Josep & Alon Josep & Alon Josep & Alon Brown & Alone Simpson & Andrew Todd & Barry Simpson	PR 813 01 01 01 01 01 01 01 01 01 01 01	Eng Calls 111 135 1082881258 1173700075 102 1444220203 1035518327	Department Helpdesk Helpdesk		ACD State Sign-Out Unavailable - Cles Available Sign-Out Available		Lam Lam Dor	is in a meeting from out to lunch from	20 May 12:25 un	4.09 unlit furthe		fice	
Abandoned Calls List Agent and Supervisor	Barry Simpson Contacts Call Logis (Search Name A Asin Jose A Asin Jose A Asia Todd A Asia Todd A Andrew Simbo G Andrew Todd Barry Simpson C Charlot Guarry	Pr 83 83 00 00 00 00 00 00 00	Ca85 cone 111 135 1022881258 1173700075 102 1444220203 1035518227 1082881223	Department Helpdesk		ACD State Sign-Out Unavailable - Clet Available Sign-Out		Lam Lam Dor	is in a meeting from out to lunch from : not disturb	20 May 12:25 un	4.09 unlit furthe		fice	Busy Lamp Field
Abandoned Calls List Agent and Supervisor	Barry Simpson Contacts Call Logs (Datacon Nume & Acian Josep & Anatair Brown & Anatair Brown & Anatair Brown & Anatair Brown & Andrew Todd & Barry Simpson & Charlotte Quarty & Charlotte Duarty	PH 81 00 01 01 01 01 01 01 01 01 01 01 01 01	Eng Ca8s 111 135 1082881268 1173700075 102 1444220203 1005518027 1002681203 1002681264	Department Helpdesk Helpdesk		ACD State Sign-Out Unavailable - Cles Available Sign-Out Available		Lam Lam Dor	is in a meeting from out to lunch from : not disturb	20 May 12:25 un	4.09 unlit furthe		ffice B	
Abandoned Calls List Agent and Supervisor	Barry Simpson Contacts Call Logis (Search Name A Asin Jose A Asin Jose A Asin Jose A Asin Tode A Asine Todd A Andrew Tindh Andrew Todd Barry Simpson Chaiste Dudity Chris Millord Chris Millord	PP 83 00 01 00 00 00 00 00 00 00 00 00 00 00	Calls Ca	Department Helpdesk Helpdesk		ACD State Sign-Out Unavailable - Cles Available Sign-Out Available		Lam Lam Dor	is in a meeting from out to lunch from : not disturb	20 May 12:25 un	4.09 unlit furthe		ffice B	
Abandoned Calls List Agent and Supervisor	Barry Simpson Contacts Call Logs (Datacon Nume & Acian Josep & Anatair Brown & Anatair Brown & Anatair Brown & Anatair Brown & Andrew Todd & Barry Simpson & Charlotte Quarty & Charlotte Duarty	PP P1 00 00 00 00 00 00 00 00 00 0	Eng Ca8s 111 135 1082881268 1173700075 102 1444220203 1005518027 1002681203 1002681264	Department Helpdesk Helpdesk		ACD State Sign-Out Unavailable - Cles Available Sign-Out Available		Lam Lam Dor	is in a meeting from out to lunch from : not disturb	20 May 12:25 un	4.09 unlit furthe		ffice E	
Abandoned Calls List Agent and Supervisor	Barry Simpson Contacts Call Logs (Nation Addit Joseph Addit Joseph Addit Joseph Addit Joseph Addit Joseph Addit Brown Addit Watter Additer Uodd Barry Simpson Charlotte Ouaty Charlotte Ouaty Charlotte Ouaty Charlotte Ouaty Charlotte Dadits	8: 8: 00 01 01 02 02 02 02 02 02 02 02 02 02 02 02 02	Eng Galls ione 111 135 1062281268 1173700075 102 1444220203 1062581228 1002881224 133 1002881264	Department Helpdesk Helpdesk Sales Team		ACD State Sign-Out Sign-Out Unavailable - Cles Available Sign-Out Available Sign-Out		Lam Lam Dor	is in a meeting from out to lunch from : not disturb	20 May 12:25 un	4.09 unlit furthe		ffice	
Abandoned Calls List Agent and Supervisor	Barry Simpson Contacts Call Logis / Dearch Name A Asin Jose A Asin Jose A Asia Todd A Asia Todd A Andrew Smith Andrew Todd Barry Simpson Chris Miltod Chris Milto	PP 88 80 00 00 00 00 00 00 00 00 00 00 00	Eng Case 111 135 10022812268 1173700075 10022812281 10022812281 10022812281 10022812281	Department Helpdesk Helpdesk Sales Team Helpdesk		ACD State Sign-Out Unavailable - Citel Available Available Sign-Out Sign-In Sign-In		Lam Lam Dor	is in a meeting from out to lunch from : not disturb	20 May 12:25 un	4.09 unlit furthe		ffice .	
Abandoned Calls List Agent and Supervisor	Barry Simpson Contacts Call Logs (Nation Addit Joseph Addit Joseph Addit Joseph Addit Joseph Addit Joseph Addit Brown Addit Watter Additer Uodd Barry Simpson Charlotte Ouaty Charlotte Ouaty Charlotte Ouaty Charlotte Ouaty Charlotte Dadits		Eng Ca86 111 135 1082881268 1173700075 1002 1444220203 1005518327 1002881233 1002881254 133 1002881254 133	Department Helpdesk Helpdesk Sales Team		ACD State Sign-Out Sign-Out Unavailable Available Sign-Out Available Sign-Out		Lam Lam Dor	is in a meeting from out to lunch from : not disturb	20 May 12:25 un	4.09 unlit furthe		ffice a	

3 MAIN INTERFACE ELEMENTS

3.1 ACD State Buttons

ACD State buttons for setting the agent's availability to the call center. When clicking "Unavailable" the user will be presented a list of unavailable codes as configured in BroadWorks.

3.2 Call Control

Call Control buttons provide quick access to common telephone handling commands. Only services that are assigned to the user are displayed.

3.3 Active Call Window

This provides a list of all current calls and their state. For example, Ringing, Active or On Hold. The duration of the call is also displayed.

3.4 Contacts [Busy Lamp Field]

This panel will display up to 30 monitored users, displaying their Do Not Disturb [grey], Available [green], Engaged [red] or Ringing [orange] state as icons.

3.5 Call Logs

Toggling the bottom Contacts panel to Call Logs will display Missed Calls, Received Calls and Dialled Calls.

3.6 Abandoned Calls

In the Agent Enterprise version, a supervisor can assign abandoned calls to the agent for a callback. These will be listed in the "Abandoned Calls" tab. Double click these calls to make the outbound call. If the agent is a member of BroadSoft premium call center using DNIS, then Unity will automatically change the outbound CLI to be that of the DNIS queue. Right click the call to mark as processed and remove from the agent list.

Please note that this functionality requires an instance being setup for the group in Unity Wallboard.

Contacts Call Logs Voicem	a Abandoned Calls	
Call center All	~	
Call Date	Call Center	DNIS
28/07/2016 11:56:17	Qudo Support	
03/08/2016 11:00:44	Qudo Support	
09/08/2016 16:55:21	Qudo Support	

3.7 Voicemail

Clicking into the Voicemail tab will display a list of voice messages with the most recent at the top.

Search on name or	Contacts Call Logs (1 Missed)) Voicemail			My status: available in office	Refresh voicemail list, or save or
phone number	Search	٩,			* 2 5	delete selected items
	Call Date	Name	Phone Number	Duration		
	06/04/2016 18:47:05	James Smith	1312	00:00:43		
	03/04/2016 18:43:22	Lewis Marcantonio	1265			
	26/02/2016 10:35:42	DRDINDIA Conference Room	8330	Play		
	26/02/2016 10:34:56	DRDINDIA Conference Room	8330	Save		
	22/02/2016 18:31:43	Hannah Carpenter (Business)	+44797066303	Delete		
	15/02/2016 16:10:15	Unavailable	Unavailable	belete		
	15/02/2016 11:39:50	Parvathi M	8322	Call		
				Instant message		Options when
				instant message		right-clicking
				Reset column widths		
				Show gridlines		

4 CALL CENTER AGENT FUNCTIONALITY

Inbound ACD calls will display the call center name, as configured in BroadWorks, in the "To" field. The "From" field will display the incoming CallerID [if not withheld] or the name of the caller if that can be matched from the Directory. Answer the call by lifting the IP phone handset, clicking Answer/Release call control button or double clicking the call in the Active Call Window.

valiable Answer		ansfer Hold Co	voicemail	Recording Call park	Announce Reports	Settings	
	_		My Statistics				
lame	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered
Bolts Sales	0	0	0	00:00:00	00:00	0	0
Nuts Sales	-	-	-	-	-	1	0
	0	0	0	00:00:00	00:00	0	0
From		1	Го		Duration		Status
0795634441)	1	Nuts Sales (Nuts Sa	iles)	00:00		Ringing

Hang up the IP phone handset or click Release 🖭 to end the call.

4.1 Changing ACD State

Clicking Unavailable, Available or Wrap-Up will change your availability for all queues you are a member of.



4.1.1 Only Show One ACD Button

Unity Agent can optionally be configured in Settings > Incoming Calls > Call Center > Agent > ACD State to only display one ACD button, which will be the currently selected state.

4.1.2 Assigning Unavailable Codes

When the agent selects unavailable, any unavailable codes that have been configured in BroadWorks will appear.

Unavailable Code assignment with one ACD button:

Availe	Available Wrap-up		1	Conference Vocemail Recording	Repo
	Unavailable		•	Clearing Tickets (default)	
Name		Total Calls		Lunch	ig in
Summa	ry	0		Paperwork Technical Support & Testing	0:0
Fro	n		То	Training	

4.1.3 Force Disposition Code

To assign a Disposition Code the agent right clicks in the Active Call Window. Unity can force the agent to enter a disposition code by setting their ACD state post-call to Wrap-Up ACD state.

ervices Settings		
Incoming Cals Anonymous Cal Rejection Cal Forward Always Cal Forward Busy Cal Forward No Answer	Configure cal center agent settings such a	s ACD state.
Call Center Agent	Startup & desktop unlocked ACD state	
ACD State	Not Set	*
Columns	Post call ACD state	
- Reporting - Abandoned Calls	Not Set	÷
Comm Pilot Express	Desktop locked ACD state	
- Avaiable: In Office - Avaiable: Out Of Office	Not Set	*
- Busy Unavalable - Do Not Disturb	Wrap-up duration (sec)	
- External Caling Line ID Delivery	Don't change my ACD state to Availab	le until I assign a disposition code
Internal Caling Line ID Delivery Simultaneous Ring	Prevent me from manually changing m	v ACD state when on a call center call.
Outgoing Cals	Only show the current ACD state but	ton
- Caling Line ID Delivery Blocking	Activate sign-out ACD state when Uni	ty is closing.
Broadworks Anywhere Call Transfer	When displaying ACD state	
Call Park Retrieve Call Recording Call Waiting Directed Call Pickup With Barge-in ↓	Show duration	Y

4.2 Using Personal Wallboard

The Personal Wallboard will show current performance metrics for the call centers the agent is assigned to. The stats are broken down by "My Statistics" which shows the agent's individual performance and "Overall Queue Statistics" which will show the current conditions across the entire call center[s].

4.2.1 Configuring Statistics Columns in Personal Wallboard

The statistics shown in "My Statistics" and "Overall Queue Statistics" panels of the Personal Wallboard are configurable in Settings > Services > Call Center > Statistics > Columns.

Services Settings	
Incoming Cals Anonymous Call Rejection Call Forward Always Call Forward Muays Call Forward Nuays Call Forward Nu	Specify which columns should be displayed in the personal wallboard. Threshold values can also be set for many columns Agent Columns Call Center Columns Total Cals Cals Answered Total Missed Cals Cals No Queue
Abandoned Calls Comm Plot Express Available: In Office Available: Out Of Office Busy Unavailable Do Not Disturb External Caling Line ID Delivery Internal Caling Line ID Delivery Simultaneous Rno	Longest Wait Time Average Wait Time Average Taik Time
Outgoing Calls Calling Line ID Delivery Blocking Call Control Broadworks Anywhere Broadworks Mobility Call Transfer Gall Park Retrieve	
- Call Recording - Call Walting	

4.2.2 Customizing Statistics Label

Double click any statistic as displayed in the list above. From the below field you are able to customize the statistic label as required.

Statistic to displa NumberOfCallsAl		•
Column heading Abandoned		
 Set threshold Highlight non Increasing the 	-zero values	
Green: >=	1	
Yellow: >=		
ited i	5 10	

4.2.3 Configuring Alert Thresholds in Personal Wallboard

Double click any Statistic in Settings > Services > Call center > Statistics > Columns and tick "Set threshold alert values". This will display a table where corresponding values can be configured that will progressively change the statistic background colour greed, yellow, red and black.

ervices Settings									
Horoming Calls Anonymous Call Rejection Call Forward Always Call Forward Navys Call Forward No Answer Call Conter Agent ACD State	Î	Specify which columns should be displayed in the also be set for many columns	e personal walb	oard. Thr	eshold va	alues ca			
		Statistic to display							
ACD State		NumberOfCallsAbandoned	•						
Columns		Column heading							
Reporting		Abandoned							
Abandoned Calls Comm Pilot Express Available: In Office Available: Out Of Office	-	V Set threshold alert values							
		Call Center							
-Busy		AI	5	10	15	20			
- Unavaiable		Bolts Sales	1	2	5	10			
- Do Not Disturb - External Caling Line ID Delivery		Nuts Sales							
- Internal Caling Line ID Delivery									
Simultaneous Ring									
Caling Cals Caling Line ID Delivery Blocking									
Call Control									
- Broadworks Anywhere									
- Broadworks Mobility - Call Transfer									
- Call Transfer Call Park Retrieve		-							
- Cal Recording									

Double click an entry in the list to set overall threshold values or those for a specific call center.

		Ove	erall Queue Statis	tics		R.
Calls In Queue	Total Calls	Calls Answered	Total Missed Calls	Average Talk Time	Missed %	Busy Overflows
0	0	0	0	00:00	0.00	0
0	2	2	0	01:31	0.00	0
0	35	33	2	02:58	5.71	0
0	6	6	0	02:25	0.00	0
0	43	41	2	01:43	1.43	0

4.3 Joining & Leaving Queues

Right click any queue in the Personal Wallboard to toggle between Join and Leave queue. Queues that you are joined to have a green icon next to them. This is only available if the Agent is allowed to join or leave a call center queue.

4.4 Standard Escalation

Standard escalation is used when the agent needs to be given information or instruction from the supervisor without conferencing in the remote party. Typically, the agent will release the call to the supervisor and replay the information to the remote party.

4.5 Emergency Escalation

Emergency escalation is used to immediately conference a supervisor into the call with the remote party, therefore it relies on either the 3-Way or N-Way Calling user service being assigned to the agent. When performing an emergency escalation, Unity will place any active calls on hold then dial the selected supervisor, or the first supervisor that is available.

4.6 Escalation via Active Call Window

To perform escalation, the agent right-clicks the call in the active call window, then either chooses the supervisor to escalate the call to:

Add number to personal directory				
Call/escalate to first supervisor Instant conference/escalate to first supervisor				
Supervisors	•	Agent P 335	•	
Assign disposition code	•	Chris Test2 DRD Boardroom Iain Sinnott	+ + +	
		Krysia Swiatek	•	Call/escalate
		Lee Houston	•	Instant conference/escalate
		Steve Tutt	•	Transfer
				Instant message

Or escalates the call to the first available supervisor.

_		-
	Assign disposition code	۲
	Supervisors	Þ
	Instant conference/escalate to first supervisor	
	Call/escalate to first supervisor	
	Add number to personal directory	

4.7 Personal Statistical Report

To access the reports, click the Reports button where a select Tools > Call Centers > Report Viewer from the menu. Specify the reporting period, click Tools > Call Centre > Report Viewer.

5 CALL CONTROL

All calls are managed through the call control buttons at the top of the application. These buttons will change depending on the state of the selected call, or the only call if there is only one call in

the Active Call Window. For example, the Answer/Release 📰 🔛 and Hold/Retrieve 📟 🔛 buttons toggle as only one of these options will be valid at any time.

5.1 Making a Call

5.1.1 Using the Dial Window

Click the Dial button to bring up the Dial dialogue box, as shown below. Using the computer keypad enter the desired number and press Enter or click OK to make the call.

5.1.2 Using the Contacts Panel

Double click a user icon or right click and select "Call extension"

2	Call extension	
	Call extension	
0	View user details	
	Add note	
8	Instant message	
	Personal directory	•
	Manage user list	
	Appearance	+

5.2 Answer a Call

When Unity displays an inbound call, click the Answer icon 🖤 or double click the call in the Active Call Window to answer the call.

5.3 End a Call

Click the Release button to end the currently selected call. If there are multiple calls in the Active Call Window, make sure you select the right call before clicking Release.

5.3.1 Redial

You can also right-click the Dial button to see a list of the last 10 dialled numbers. Simply click on an entry to dial the party, as shown below.



5.4 Send Call to Voicemail

To send an inbound caller directly to your voicemail click the Voicemail button

5.5.1 Announced Transfer

Receive and answer an inbound call. Make a new call to the desired destination extension or number as described Make a Call above. This will automatically place the first caller on Hold and

will open a new call in the Active Call Window. Once the called party answers, click Transfer and select the context menu option to transfer both calling parties together.

File	Tools Help		A	123 455 789				6		
	8					Transfer 07956344419	•		to Charlotte Quartly	¢
Unava	ilable Available	Wrap-up	Release	Dial	Т	Transfer Charlotte Quartly	+		to number	An
	From			То			Dura	tion		Status
0	07956344419			Stev	e Tutt		01:39	9		On hold
	Steve Tutt			Cha	rlotte Qu	artiy	00:23	3		Active

5.5.1.1 Warm Transfer

Unity Agent allows you to warm transfer a call by right clicking the user you want to transfer the call to and selecting "warm transfer" from the context menu. This will then put the original caller on hold and dial the selected number. When ready, click the transfer button in the call center control options panel and the two calls will be transferred.

5.5.2 Blind Transfer

5.5.2.1 Using Contacts Panel Drag and Drop

Unity Agent can be configured to automatically blind transfer a call by dragging the call from the Active Call Window and dropping it on a user icon or number icon in the Contacts panel, or dropping it onto a call center queue [if agent is configured as an agent with call center queues].

5.5.2.2 Using Transfer Button

Once on a call click the Transfer call control button 🛸. In the Transfer window enter the destination and click OK.

From			То
Jenna Wimshurst	Transfer	×	Sally Wainwright
	Number 013598	ncel 🖋 OK	

5.5.2.3 Using Right Click

While on an active call right click the recipient icon or number in the Contacts panel or Search. Select "Transfer call to extension" to blind transfer the call.

Call extension	
Park call on extension	
Transfer call to extension	
Call mobile	
Transfer call to mobile	
Transfer to voicemail	
View user details	
Add note	
Instant message	

5.6 Call Hold/Retrieve

The Hold/Retrieve $\underbrace{}$ function toggles depending on the status of the currently selected call. Hold is only available for an active call while Retrieve is only a valid option for a call currently on Hold.

5.6.1 Placing a Call on Hold

To place a current active call on Hold, press the red Hold button. "The call status will now show as on hold in the Active Call Window and there will be an On Hold icon alongside the call.

5.6.2 Retrieving a Held Call

Click the held call in the Active Call Window to select it. Click the Retrieve button with to take the call off hold, you can also double click the call to retrieve it.

5.7 Conference Calling

A conference call can be established with any combination of internal and external numbers. The total number of parties that can be supported is determined by service assignment. The Three-

Way Calling user service supports conference calls with two other parties only while the N-Way Calling user service supports conference calls with more participants.

5.8 Starting a Conference Call

You can select two calls in the Active Call Window and click this button to quickly conference everyone together. Once in a conference you can easily select other calls and add them to it, but you must start with a conference with two other calls first. You can use the hold and retrieve buttons to hold the whole conference, and use the release button to drop a caller out of the conference. Please note this feature depends on service assignment so may not always be available.

5.9 Call Recording

You can use this button to manage call recording in two ways. You can right-click on the button to select how to record calls.



Or left click to start, stop, pause or resume recording the selected call. The button will change to show if the selected call is currently being recorded, or if recording is paused or stopped.



The call is not being recorded



The call is being recorded



Call recording is currently paused

Depending on the call recording option selected you may see a menu when clicking this button, as below.



6 ACTIVE CALL WINDOW

The Active Call Window gives visual representation of the status of all calls the user receives or is currently managing.

6.1 Window Layout

From	То	Duration	Status
Andrew Smith	Chris Tutt	00:12	On hold
Chris Tutt	Barry Simpson	00:00	Ringing

From – This field will display the incoming CallerID or the name

To – This field displays the name of the user, hunt group or call center

Duration – This displays the total time elapsed since the call was first answered.

Status – This shows the Ringing/Active, on On Hold and recording status of each call.

6.2 Calls In Queue

Agents can optionally see all calls in queue for the Call Centers they are joined to, as shown below. This is configured in Settings>Agent>Display queued call center calls in the list.

From	То	Duration	Status
Hot Desk 3 - 9103	Bolts Sales	01:48	Queued at position 1
Charlotte Quartly	Bolts Sales	01:25	Queued at position 2

7 DRAG AND DROP

Drag & drop is an important feature of Unity, it means that in order to perform an action on a call you can simply drag it on top of something. For example if you want to blind transfer a call to a user then this can be done by simply searching for that user, then dragging the call and dropping it on that user in the contacts list. You may see some options here depending on what was configured in settings, or Unity can automatically blind transfer the call. Similarly if you want to perform an announced transfer then simple drag one call on top of the other in the Active Call Window, the calls will be transferred together and be removed from the list.

You can also drag other objects into this list to make a call, for example drag a user from the contacts list into the Active Call Window to call that internal user's extension or external contact's number.

8 CONTACTS PANEL [BUSY LAMP FIELD]

The Contacts tab gives a visual indication of the status of users [within the group/enterprise] that are currently being monitoring. A maximum of 30 users can be displayed. Double clicking a monitored user will call them and right clicking will bring up a dynamic options menu.

8.1 Contact Panel Display Options

There are three different views available, as outlined below. Right-click anywhere in the Contacts panel and select Appearance list to change the view.

Personal directory	۲		
Manage user list			
Appearance	×		Details
			List
			Small icon
		~	Tile

8.1.1 Details View

This view provides by far the greatest amount of detail, but requires more space [although the list can be shortened in which case scrollbars will automatically appear]. This is the recommended view for Agents as it shows the ACD state of up to 30 monitored Agents.

8.1.2 List View

This option will display all users in a list.

8.1.3 Small Icon View

This view combines a simplified look and space reduction.

8.1.4 Tile View

This view is similar to Icon view but uses more white space to provide a cleaner look.

8.2 User Icons

There are four main user icons states shown in the Contacts panel, regardless of the view chosen.

&	Available	The monitored user extension is on hook
&	Ringing	The monitored user extension is ringing
&	Engaged	The user is on the phone
2	Do Not Disturb	The user has selected DND or Unavailable profile

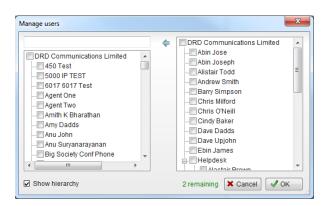
8.2.2 Instant Messaging Availability

Regardless of a user's Available/Ringing/Engaged/DND state, if they currently have any version of Unity open they will be available for instant messaging. This is shown by the envelope at

bottom right of the user icon. 🚨 🕹 🕹

8.3 Managing Monitored Users in the Contacts Panel

The Contacts panel will display 30 users. In the Contacts panel right click anywhere and click "Manage user list". This will allow you to choose which users to display.

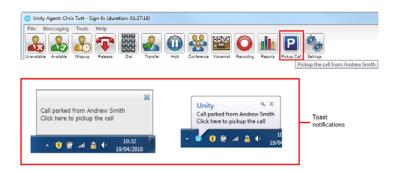


8.4 Park Call on Extension

Will park the call on the monitored user's extension park slot.

8.5 Retrieving Parked Calls

Once a call has been parked onto a user's extension, their Unity will display a "P" and a toast pop up window will appear. In order for the user to retrieve the parked call they simply need to click either the "P" or the toast pop up. If the call is not retrieved it will be redirected back to the original user who parked the call.



8.6 Camp Call on Extension

Will camp the call onto the engaged monitored user. When the user goes back on-hook the camped call will be delivered and their phone will start ringing.

9 INSTANT MESSAGING

Instant messages can be sent and received between any Unity app [Reception, Desktop, Agent, or Supervisor]. Messages sent to offline user [those that do not have an instance of Unity open] can be stored and delivered when the recipient next opens Unity.

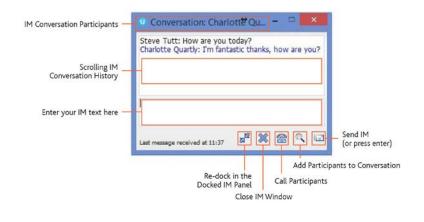
9.1 Docking the IM Window

Instant Messages can be displayed in the Docked IM Window or as separate dialogue boxes for each individual IM thread. If the docked window is used IMs can be initiated via drag and drop and new IM windows will not pop over other applications.



9.2 Undocking and Redocking IM sessions

You can undock an IM message by clicking the 🛃 "Expand conversation to separate window" button. The IM session will now be a standalone window.



9.3 Sending an Instant Message

Send an instant message either by right clicking a user icon in Contacts panel or Search and selecting "Instant Message" from the drop list, or by dragging a user icon into the docked IM panel.

9.4 Adding Participants to an Existing IM Session

When an IM conversation is in the Docked IM panel you can drag a user icon from the Contacts Panel or Search and drop them on the IM window to add them to the conversation.

9.5 Logging IM Sessions

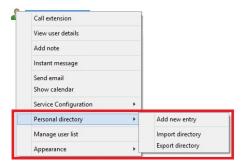
You will find the Instant Messaging and presence logging options in the Settings tab. Here you will be able to configure how IMs are saved, what file type they are (CSV or HTML) and where they are saved.

10 PERSONAL DIRECTORY

Personal Directory – Right click in Contacts

ersonal directory	•	Add new entry
/anage user list		Import directory
ppearance	•	Export directory

Personal Directory – Right click on monitored user

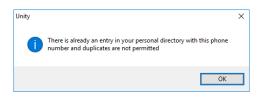


10.1 Add New Entry

Enter the Name and Number and click Ok

Add Personal Directory Entry				
Name	Suzanne Lynch			
Phone	079569			
	🗙 Cancel 🛛 🖋 OK			

If the number specified is already in the Directory the user will be alerted as below.



10.2 Edit Entry

Use the Search field in Contacts to locate the entry. You can search by either Name or Number. Right click the Entry and select "Edit".

Contacts Call Logs V Search russell	bicemail Abandoned Calls		
Name		P	hone
🖀 Russell Stevens	Call number		1202652653
	Copy number		
	Personal directory	>	Edit Russell Stevens
	Manage user list		Remove Russell Stevens
	Appearance	>	Add new entry
			Import directory Export directory

10.3 Remove Entry

Use the Search field in Contacts to locate the entry. You can search by either Name or Number. Right click the Entry and select "Remove".

Contacts Call Logs Vo	icemail Abandoned Calls		
Search russell	٩		
Name		Phon	le
🖀 Russell Stevens 🖕		0120	
	Call number		
	Copy number		
	Personal directory	>	Edit Russell Stevens
	Manage user list		Remove Russell Stevens
	Appearance	>	Add new entry
			Import directory
			Export directory

10.4 Dialling Directory Entry

Locate the entry either on the Contacts panel or Search. Drag the entry into the Active Call Window or double click to make a call, or right click the entry and click "Call number".

Contacts Call Logs Voicemail	Abandoned Calls	
Search Russell	Q	
Name		Phone
Russell Stevens		0120265265
	Call number	
	Copy number	
	Personal directory	>
	Manage user list	
	Appearance	>

10.5 Import Personal Directory

Agent will allow the user to import a .csv file of directory entries, provided they are in "name, number" format. Right click in the Contacts panel, select "Personal directory > "Import" and then browse to the location of the csv.

Personal directory	•	Add new entry
Manage user list		Import directory
Appearance	•	Export directory

10.6 Export Personal Directory

To export Personal Directory entries right click in Contacts and select Personal directory > "export". You will be prompted to save the file locally.

Personal directory	•	Add new entry	
Manage user list		Import directory	
Appearance	•	Export directory	

11 CONTACT SEARCH DIRECTORIES

The Contact Search field combines all BroadWorks and Outlook Contacts directories to create a central search repository. The BroadWorks directories include the Common Phone List [system speed dials], the receptions user's own Personal Directory entries, and the Group Directory which includes all the other users in the group as well as hunt groups, auto attendants and call centers. Unity can also integrate with third party LDAP [including Microsoft Active Directory] and SQL directories.

Contacts Call Logs Voicemail Abandoned Calls My status: available in offi					
Search col	٩				
Name	Phone	Extension	Department	ACD State	Status
🚨 Colin Farrant	02082881246	1246	Helpdesk	Sign-In	Talking to Colin Farrant - 57:09
🖀 Colin Farrant (Mobile) 07796948542		Helpdesk		
🖀 Colin Runham Mob	07860353035				
Collaborate - Audio		0346			
COLT	08707377733				
👕 John Cole	01173700074	0074			
Lorna - Oakmere C	07903545755				
Malcolm - Turners	07749937091				

Right click in the search box to select a directory, then click the search button to clear it and see the default list of monitored users.

Contacts Call Logs Voi	cemail Abandoned Calls				My status: available in office
Search	DRD Communications Limited	>	Entire directory		
Name	Common phone list Personal directory Outlook contacts		Helpdesk Sales Team	ius	
Chris Tutt	02082881248	Sig Sig	Technical Sales South		
Dave Dadds	02082881231	Availa	able		

Search results will display each number for a contact as a separate line. Drag or double click the entry to make a call or right click to select a call action from the context menu.

icons represent external numbers or system resources such as hunt groups for which presence information cannot be displayed.

 $\overset{}{\overset{}_{\overset{}_{\overset{}_{\overset{}}_{\overset{}}}}}$ icons represent other users in the group with their presence status.

12 CALL LOGS

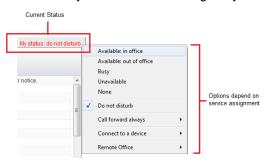
The Call Logs tab displays Missed, Received and Dialled Calls with a date and time stamp showing the most recent call at the top. Up to 20 numbers are listed unless the Enhanced Call logs service is assigned to the Agent user in BroadWorks. Calls to the Agent user DID as well as hunt group and call center calls that have reached the Agent user are shown.

Contacts Call Logs Voicemail Abandoned Calls		
Missed calls O Received calls O Dialled calls		
Call Date	Phone Number	Name
11/08/2016 16:01:38	1248	Chris Tutt
11/08/2016 12:37:31	0139:	01392
08/08/2016 16:30:58	0208	02086
07/08/2016 18:34:40	0002	Andrew Smith
07/08/2016 18:34:20	0002	Andrew Smith

Drag or double click an entry to make a call to that number. Call logs can be exported as a csv file, either individually or together, but clicked the 🗟 Export button.

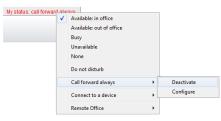
13 MY STATUS

The "My Status" link provides an indication of the current status of the user as well as quick access to key services that are regularly modified.

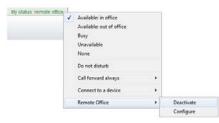


CommPilot profiles are also used to convey presence information to other users within the group or enterprise.

13.1 Call Forward Always



13.2 Remote Office



13.3 Connect to a Device [Hoteling Guest]

The user can easily select the device to connect to through the My Status link, as shown below.

