votacall))

VOTACALL UNITY SUPERVISOR

HELP GUIDE

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1 ABOUT UNITY SUPERVISOR

Unity Supervisor is a Microsoft® Windows® based application designed for use with the BroadSoft Call Center Supervisor Standard or Premium service. Unity Supervisor provides a fully integrated hosted telephony environment, including allowing the user to join/leave call center queues to which they are assigned, change their ACD state and view personal and overall call center statistics and queue conditions.

1.1 Standard vs Enterprise Features

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

Unity Supervisor

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

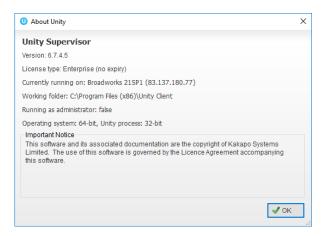
- Remotely change Supervisors ACD state [available, unavailable, wrap-up]
- Allows the Supervisor to set threshold alerts against real time statistics for call centers

Unity Supervisor Enterprise

All Unity Supervisor features but also including:

- Callback CallerID capture of abandoned calls. Call center abandoned calls can be assigned to Agents for call back and reporting. Please note: this capability requires the customer to also be running Unity Wallboard and Unity Agent Enterprise.
- Unity Connect API integration with third party database applications.

The current version can be found in Help > About Unity



1.2 Naming Conventions for this Help

- a. Call Center instances are also referred to as Queues in this guide
- b. ACD calls mean incoming calls into the call center/queue
- c. BWKS means the BroadSoft BroadWorks platform

1.3 System Requirements

1.3.1 Windows PC Requirements

- a. Unity will require approx 20MB of hard drive space on the local machine
- b. By default the install directory is C:\Program Files (x86)\Unity Client
- c. Minimum computer spec: CPU: dual core 3Ghz. Ram: 4GB. Video Card: 256MB onboard RAM. As a general note, the requirements to run Unity Supervisor are considerably less than those required to run Windows
- d. Unity can be rolled out as an MSI file, which supports Active Directory group profiles
- e. Unity is only supported on Windows 7, Windows 8.1 and Windows 10
- f. Both 32 and 64-bit versions of Windows are supported. There are no special permissions required to install Unity

1.3.2 Internet & Firewall

Unity requires high-speed internet connectivity and access to the below locations, which may require firewall rules to be added on the customer premises:

- a. TCP port 2208 to im.unityclient.com
- b. TCP port 2208 to the VoIP platform OCI server
- c. HTTP/HTTPS access to portal.unityclient.com

d. HTTP/HTTPS access to the VoIP platform XSI server [if call recording, visual voicemail or enhanced call center reports are used]

1.3.3 BroadWorks Platform Requirements

a. Unity Supervisor is supported on BWKS R17 SP4 and above

1.3.4 BroadWorks License and Service Requirements

Client Call Control

The Client Call Control service, assigned to the user, is mandatory as this is the service that allows Unity to integrate with the VoIP platform. If this service is not assigned, then the user will be alerted and Unity will not provide any functionality.



Internal calling line ID delivery & external calling line ID delivery

The Internal Calling Line ID Delivery and External Calling Line Id Delivery services should both be assigned as these services allow Unity to identify calls to/from other users in the business. If not assigned Unity will function, but the user will be prompted that this functionality will not be available.



Call transfer

The Call Transfer service is required in order to blind or announce transfer calls to internal and external numbers. Unity will alert the user if this service is not assigned.



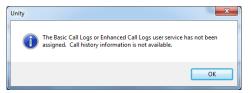
Three-Way Call or N-Way Call

Either the Three-Way Calling or N-Way Calling service must be assigned to provide conferencing functionality, Unity will alert the user if neither service is assigned.



Basic Call Logs or Enhanced Call Logs

Either Basic Call Logs or Enhanced Call Logs must be assigned to the user in order to see dialled, received and missed calls. Unity will alert the user if neither service is assigned.



2 INITIAL SETUP

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	
Server address:	
im.unityclient.com	
Server port:	
2208	
Log connections	

Restart Unity Supervisor to begin.

2.1 Call Center Login Details

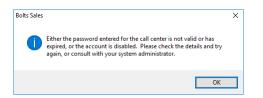
Once Unity has been restarted it will connect to the host BroadWorks system and populate all the Call Center Instance IDs for the call centers that the supervisor is a member of as shown below.

0 Services & Settings		
Services Settings		
- Skin - Contact Search - Contact Display - Current Cals - Computer/Phone Integration	Specify call center authentication details. All login ids and passwords are case sensitive and each login id must include the domain.	
Claboard Integration Dialing Rule Custom Directory Integration Lonfiguration	Default password	
Outlook Integration Browser Integration	Call Center Login Details	
Eronset megaduon CRM Comment Cam Cestop Integration Cam Comment Comment Comments Commands Startup Update Instant Messaging & Presence Logging XMPP Security Language Connection Network	✓ Bolts Sales ✓ Nuts Sales	
Droxy Call Centers	☑ Alert me when a call center login fails	
	🗶 Cancel 🖉 OK	

The password for each call center must be added in order to populate the call centers in the Personal Wallboard. Double click a call center to add the password. Where the password is the same for each call center click the "Apply to all queues without a password" box and restart. Unity will now login as the call center queues and you will see these begin to populate the Personal Wallboard.

Call Center Login Details
Service ID
boltssales@drd.co.uk
Password
Login status
The password has not been entered.
Apply to all queues without a password

Ticking "Alert me when a call center login fails" will pop this dialogue box when Supervisor starts and cannot login successfully to a call center.



2.2 Call Center Login Default Password

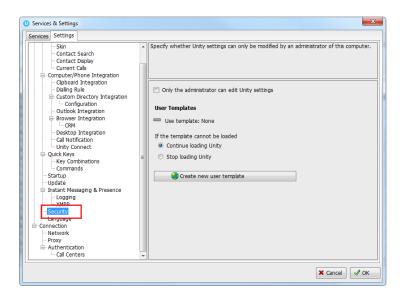
If all call center passwords are the same, use the default password option. Enter the password for the call centers so that when a new call center is added in the future the supervisor doesn't have to enter the call center password as Unity will do this automatically. Please note that all call center passwords have to be the same for this option to work.

Services & Settings	×	
Services Settings -Skin -Skin -Contact Search -Contact Search -Contact Display -Contact Display -Computer/Phone Integration -Configuration -Daling Rule -Configuration -Outbook Integration -Daling Rule -Outbook Integration -Daling Rule -Outbook Integration -Daling Rule -Outbook Integration -Canflouration -Outbook Integration -CRM -Outbook Integration -CRM -Outbook Comparison -CRM -Outbook Integration -CRM -Outbook Integration -CRM -Dating Rule -Unity Connect -Outbook Integrations -Commands -Startup -Update -Instant Messaging & Presence -Logging -Security -Language	Specify call center authentication details. All login ids and passwords are case sensitive and each login id must include the domain.	
Connection Network		
- Proxy Call Centers	☑ Alert me when a call center login fails	
	🗙 Cancel 🖉 OK	

2.3 Selecting a Pre-Configured Template

User templates can only be created by an administrator to configure default settings for supervisors. ACD buttons, call center control, recording options and all other settings can be configured and saved as a template that can be easily assigned to all users.

Please see your Administrator for a separate guide on using Unity Templates.

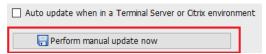


2.4 Manual and Auto Updates

Unity can be configured to automatically update when a new version is available. Simply tick the box in settings>update as shown below.

O Services & Settings	x
Services & Settings Services & Settings Services & Settings Services & Settings - Contact Search - Daling Rule - Outook Integration - Daling Rule - Canto Constructory Integration - Deling Rule - Canto Construction - Outook Integration - Canto Construction - Outook Integration - Canto Construction - Canto Construction - Call Notification - Unconstruction - Canto Commands - Statution - Instant Messaging & Presence - Logging - XMAP - Security - Language - Connection - Network - Proxy - Authentication - Cantop	
	🗶 Cancel 🛛 🛷 OK

When a new version of Unity is available the user will be presented with a popup asking to restart Unity. Once Unity has restarted the latest version will be running. You can also configure how often Unity looks for updates under the auto update box. To manually update Unity, click Perform manual update now and Unity will search for any new updates.

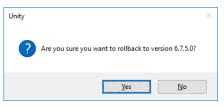


2.5 Rollback available

If rollback available is ticked in the Unity portal, then users can rollback to previous versions of Unity. Go to settings>update and the choose the desired version from the drop down menu.

Rollback		
Versions available		
	~	1

Once you've selected which version you want to rollback to click the green tick and the box below will appear.



Click Yes and then click Ok.

3 UNITY SUPERVISOR 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.

		Calls Answered Calls Calls 0 0 0 0 	Missed Calls 0 00:00:00 0 00:00:00	Average Talk Time All Calls 00:00 0 00:00 0 - 40	Answered Missed 0 0 9 0 35 5	Calls In Queue Tim 1 Colls In Queue Tim 0 00: 0 00:	te Time 18 00:00 00 00:14	Verage Talk Time Staffed 00:00 2/5 04/22 2/10 03:14 2/8	Personal Wallboard
Active	From	5 14	To		Duration	Status	16. CAN		
all Window	Andrew Smith		Engineering		00:17		t position 1 (previously at	sandoned)	
	Contacts Call Logs Aba	out on a sub-sub-sub-sub-sub-sub-sub-sub-sub-sub-	💌 🖲 Queues 🔿 .	Agents				Ny status: available in office	
	Name	ACD State	ACD Duration	Total Calls	Missed Calls	Total Talk Time	Total Staffed Time	Average Talk Time	
	Alastair Brówn	Sign-Out	02.42.53	12	2	00:40:58	08:57:12	0422	
	Law Colin Farrant	Sign-In Sign-Out	149-20-48 04:19:42	11	0	00.00.00	19.42.53 08:36:00	00.00	
	& Dean Thompson	Sign-Out	00.04.32	0	0	00.00.00	00.00.00	00.00	
	& Ed Thrussell	Sign-In	12:36:36	0	0	00.00.00	06:49:27	00:00	Ducu
	🙎 Harry Dadds	Wrap-Up	00:01:02	0	0	00:00:00	00:00:00	00:00	Busy
	& Paul Dewey	Available	03:42:12	13	4	00.31.03	08:32:41	03:54	
	😤 Vas Koria	Sign-Out	04:20:33	9	.1	00:35:02	08:23:08	0422	Lamp Fie

3.1 Resizing Unity Supervisor

Unity can be dragged from any corner to the required size. The Active Call Window resizes independently by dragging the border at the bottom of the list [where the lower red line is in the illustration above]. When Unity is closed, all current dimensions will be saved.

3.2 Maximising and Minimising

Unity can be maximised and minimised using the standard buttons in the top right hand corner of the application. When minimised, Unity appears in the system tray in the bottom right hand corner of the desktop where the Unity icon ⁰ will be displayed. To re-open Unity simply double click this icon, or right click and select Restore from the menu, as shown below.



3.3 Using Unity Supervisor from the System Tray

In its minimised state, Unity Supervisor can be configured to sit in the System Tray. This is in Settings [button] > Settings [tab] Appearance.

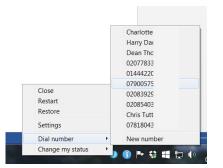
```
When minimised, place Unity in the

system tray
taskbar
```

Right clicking the Unity icon **()** in the system tray allows the user to dial or redial, configure settings such as CommPilot Express Profiles, DND, Call Forward Always or Remote Office, or change their ACD state. Note: Only those services that are assigned to the user in BroadWorks will be displayed.

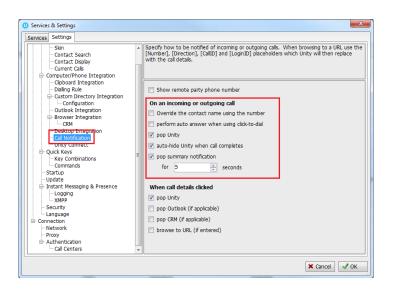
Close Restart Restore Settings		 ✓ 	Available: in office Available: out of office Busy Unavailable None	
Contacts Call Logs			Do not disturb Call forward always	×
Dial number	•		Connect to a device	+
Change my status	+		Remote Office	×
ACD State	+) 📴 all 🔒 🔶	

Selecting "Dial number" will provide a list of the last 10 dialled numbers as illustrated below. "New number" will pop a call box where the user enters the desired number using their computer keyboard.



3.4 Call Notification Preferences

Unity Supervisor can be configured to pop when a call is presented, or pop a "toast" summary notification above the system tray when a call is presented. Optionally, Supervisor can also perform auto-answer when using click-to-dial. If this is not selected then the IP phone will ring and the user will have to lift the handset to initiate the outbound call.



3.4.1 Show Remote Party Phone Number

This setting will configure to show the remote party number [if available], as shown below. This applies to both internal and external parties.

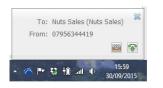
From	To	Duration	Status	
From Chris Tutt	Andrew Smith (0002)	00:00	Status Ringing	

3.4.2 Override Contact Name Using Number

Unity can also perform a contact search based on the remote party number even if the name was provided by the Broadworks platform, this is especially useful when the name delivered through the PSTN is incorrect, for example in some cases this may always be "WIRELESS CALLER".

3.5 Summary Toast Notification

The summary notification is presented for hunt group, ACD and DID calls and can be used to route the call to voicemail or answer the call.



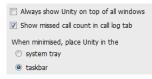
3.6 Browser Screen-Pop

The summary notification is also clickable and can be used to open the PC default browser to a preconfigured URL and append incoming call information, such as the phone number of the

remote party. This feature can be used for screen popping CRM systems and other browser based applications. Further information on this feature is in a supplementary guide.

3.7 Appearance

In Settings [button] > Settings [tab] > Appearance, the user can change the behaviour of Unity.



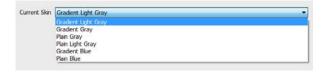
Always show on top of all windows – Unity will always be on top Show missed call count in the call log tab – When enabled Unity will provide a count of the number of missed calls as below

Contacts Call Logs (2 Missed)

Show remote party phone number – This will show the phone number and the name [if matched] in the "From" field

3.8 Skins

In Settings [button] > Settings [tab] > Appearance > Skin, the user can change the look of Unity with preset Skins.



4 MAIN INTERFACE ELEMENTS

4.1 ACD State Buttons

ACD State buttons for setting the supervisor's availability to the call center. When clicking "Unavailable" the user will be presented a list of unavailable codes as configured in BroadWorks. Please note this is only available if either Call Center Agent Standard or Premium service is assigned to the user.

4.2 Call Control

Call Control buttons provide quick access to common telephone handling commands. Only services that are assigned to the user are displayed. For example, if Call Recording and Voicemail are not assigned then the buttons will not be displayed.

4.3 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. This is from the moment the call was first placed and does not reset when a call is Held or Retrieved. Unity will mirror any call handling made on the user's IP phone. For example, if the call is placed on Hold on the handset, the user will show as being on Hold in the Active Call Window.

4.4 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.

4.5 Call Logs

Toggling the bottom Contacts panel to Call Logs will display Missed Calls, Received Calls and Dialled Calls. Missed Calls will include both direct inward DID calls, ACD and Hunt Group calls. 20 numbers can be stored unless the user has Enhanced Call Logs service assigned. Call Logs can also be cleared, reloaded or exported with the icons at top right of the panel.

4.6 Abandoned Calls

In the Supervisor Enterprise version, a Supervisor can assign abandoned calls to an Agent for a call back. These will be listed in the "Abandoned Calls" tab. Right click these calls to assign them to an Agent or double click to make the outbound call. If the Supervisor 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 abandoned call list.

Contacts Call Logs Voice	mail Abandoned Calls Agent Activity				
Call center All	~				
Call Date	Call Center	DNIS	Number		Name
28/07/2016 11:56:17	Qudo Support		Call		Scott Davies
28/07/2016 17:54:59	Qudo Support		Call		0148266493
29/07/2016 08:39:53	Qudo Support		Assign for callback	>	Jenna Wimshurst
0000000000000000000	11 11 10 0 I				

4.7 Voicemail

Clicking into the Voicemail tab will display a list of voice messages with the most recent at the top. Double click an entry to play through the PC's default media player. Right click to save locally or delete.

	Contacts Call Logs (1 Missed) Voice	email Agent Activity					My status: available in offi	се	
Search on name or phone number	Search	Q					× 2 C	-	Refresh voicemail list, or save or 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			00.00.07			
	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		beiete				
	15/02/2016 11:39:50	Parvathi M	8322		Call				
					Instant message			_	Options when right-clicking
					Reset column widtl	hs		-	
				√	Show gridlines				

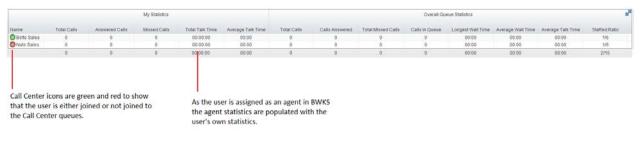
In order for the Voicemail tab to appear, Supervisor must be configured for "Use unified messaging" and "Show visual voicemail tab" in Voicemail settings as below.

rvices Settings		
Cal Center Agent ACD State Statistics Columns Reporting	 Configure your personal voice messaging. 	
Abandoned Cals Comm Pilot Express Available: In Office Available: Out Of Office Busy Unavailable On Not Disturb	Enabled	
	Output Use unified messaging	
	Use phone message waiting indicator	
	Show visual voicemail tab	
	O Forward the voicemail via email	
External Caling Line ID Delivery Internal Caling Line ID Delivery Smultaneous Ring Outgoing Calis Caling Line ID Delivery Blocking	Email notification of new voicemails	
- Call Control - Broadworks Anywhere - Call Transfer	Email a copy of the voicemail	
- Call Park Retrieve - Call Recording - Call Waiting	Transfer from voicemail on zero	
Directed Call Pickup With Barge-In Hoteling Guest Remote Office	Send all calls to voicemail	
Shared Call Appearance	Send busy calls to voicemail	
Messaging	Send unanswered calls to voicemail	

4.8 Personal Wallboard

If the Supervisor is not also an agent for the queue in BWKS, then they will not be able to Join/Leave or take calls for those queues. The Join/Leave status icon will show as grey and there will be no statistics in the "My Statistics" window as below.

When the user is also an agent



When the user is not an agent



4.9 Using Personal Wallboard

The Personal Wallboard will show current performance metrics for the call centers the Supervisor is assigned to. The statistics are broken down by "My Statistics" which shows the Supervisor's individual performance [assuming the supervisor is also an agent of the call center, as described above] and "Overall Queue Statistics" which will show the current conditions across the entire call center[s]. The content is icon at the upper right hand corner of Personal Wallboard toggles between showing all call centers individually [Maximized View] or a summary of all call centers combined [Minimized View].

Maximized View

		My Statistics					Overall Queue Statistics					8
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Bolts Sales	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
Nuts Sales	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
VanillalP Sales	0	0	0	00:00:00	00:00	1	1	0	0	00:00	00:02	00:17
🔘 Vanillaip Sales Overflow	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
	0	0	0	00:00:00	00:00	1	1	0	0	00:00	00:00	00:04

Minimized View

			My Statistics					Overa	II Queue Sta	tistics		R _M
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Summary	0	0	0	00:00:00	00:00	1	1	0	0	00:00	00:00	00:04

Note: Statistics shown in Personal Wallboard reset every 24 hours at midnight.

4.10 Locking in Minimized State

To disable the ability to maximise and minismise the Personal Wallboard, activate "Only display summary statistics" in Settings > Call Center > Statistics as below.

4.11 Staffed Ratio

Personal Wallboard in Unity Supervisor includes "Staffed Ratio", an additional stat that is not available in Unity Agent. For each queue, Staffed Ratio shows the total number of Agents that are available to take calls [i.e. that are Joined to the queue and have ACD state set to Available], out of the total number of Agents assigned to the queue in BWKS.



4.12 Longest Wait Statistic

By default, Unity Supervisor displays the "Longest Wait Time" stat. This shows the wait time of the longest waiting call in the queue. If there are no calls in the queue this will be zero. This stat can optionally be removed in Settings > Services > Columns > Call Center Columns. Click the statistics you want to remove then click the minus sign to remove it.

4.13 Statistics Refresh Timer

If the Client Call Control service is assigned to the queue in BWKS then the "Calls in Queue" stat [as shown in Personal Wallboard in Agent and Supervisor and Wallboard] will be a real-time stat. The "Longest Wait" stat is also real-time, in that it will start showing the wait duration in seconds for the longest waiting call in queue from the point it was displayed, so if there are no calls currently in queue then this statistic will be zero. All other statistics are polled from BWKS on a default 900 second timer. The timer can optionally be configured to a minimum level specified by the Service Provider with the minimum permissible duration being 60 seconds.

5 CALL CENTER AGENT FUNCTIONALITY

Unity Supervisor also allows the user to perform call center agent functionality such as changing ACD state, joining and leaving a queue and taking calls for that queue. This functionality is dependent on either the Call Center Agent Standard or Call Center Agent Premium service being assigned to the user, in which case the below functionality will automatically become available.

5.1 Changing ACD State

Clicking Unavailable, Available or Wrap-Up will change your availability for all queues you are a member of. This will not impact receiving inbound direct calls. The currently selected state will have the ACD state name in red text, as Available is in the below example.



5.1.1 Only Show One ACD Button

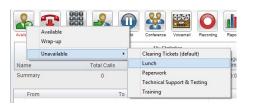
Unity Supervisor can optionally be configured in Settings > Incoming Calls > Call Center > Agent > ACD State to only display one ACD button, which will be the currently selected state. Left clicking will provide the other ACD options.

ervices Settings			
Incoming Calls Anonymous Call Rejection Call Forward Always Call Forward Busy Call Forward No Answer Call Forward No Answer Call Center	^	Configure call center agent settings such as ACD state	
- 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	
Available: In Office		Not Set	~
- Available: Out Of Office Busy		Wrap-up duration (sec)	
Unavailable		0	
- Do Not Disturb External Calling Line ID Delivery		Don't change my ACD state to Available until I ass	sign a disposition code
- Internal Calling Line ID Delivery		Prevent me from manually changing my ACD state	e when on a call center call.
- Simultaneous Ring Outgoing Calls		Only show the current ACD state button	
Calling Line ID Delivery Blocking		Activate sign-out ACD state when Unity is closing.	
Call Control Broadworks Anywhere		When displaving ACD state	
Call Transfer		Show duration	~
Call Park Retrieve Call Recording			
Call Waiting			
 Directed Call Pickup With Barge-i 	n v		

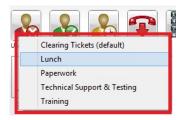
5.1.2 Assigning Unavailable Codes

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

Unavailable Code assignment with one ACD button:



Unavailable Code assignment with three ACD buttons:



5.1.3 Force Disposition Code

To assign a Disposition Code the supervisor right clicks in the Active Call Window. Unity can force the supervisor to enter a disposition code by setting their ACD state post-call to Wrap-Up ACD state. When they click Available they get a drop list of Disposition Codes. They must choose one for the previous call before they can become Available. This feature is activated in Settings as below.

When Unity is configured to force the agent to assign a disposition code through a popup window which is automatically displayed to the user when the call is released.

The Unity UI will be disabled and the popup window will appear over all applications on the user's desktop. A timer can be specified which will display a count-down to the user, and will automatically close once the timer duration has elapsed. When they click Available they get a drop list of Disposition Codes. They must choose one for the previous call before they can become Available. This feature is activated in Settings as below.

ervices Settings	
Incoming Cals Anonymous Call Rejection Call Forward Always Call Forward Always Call Forward No Answer Call Forward No Answer Call Forward No Answer Call Center Supervisor Call Center Montoring Statistics Conter Montoring Statistics Reporting Abandoned Cals Comm Plot Express Awaible: In Office	Configure call center agent settings such as ACD state. Startup & desktop unlocked ACD state Not Set Vot call ACD state Not Set Vot call ACD state Not Set Vot Set V
Available: Out Of Office Busy Unavailable Do Not Disturb External Calling Line ID Delive Simultaneous Ring	
Outgoing Calls Outgoing Calls Outgoing Calls Calling Line ID Delivery Blocki Call Control Broadworks Anywhere Call Transfer	g When displaying ACD state Show duration ∨
Call Park Retrieve Call Recording Call Waiting	

Assign Disposition	Code - 00:04 remaining	×
Code		~
0 0 0	1 Call from Reseller 2 Call from Direct customer 3 Call for other member of staff 4 Cold Call 5 Did not add a code Existing Customer New Customer	

5.1.4 Displaying ACD State Duration

The top bar in Unity Supervisor will show the current ACD state as below.

Unity Supervisor: Jenna Wimshurst - Unavailable - Paperwork (duration: 00:15)

This can optionally be configured to also display the ACD duration or the time that the ACD state was changed. This is configured in Settings > Agent > ACD State as below.

arvices Settings	
Incoming Calls Anonymous Call Rejection Call Forward Always Call Forward Busy Call Forward No Answer	Configure call center agent settings such as ACD state.
Gal Center Agent	Startup & desktop unlocked ACD state
ACD State	Not Set
Columns	Post call ACD state
Abandoned Calk	Not Set 👻
E- Comm Pilot Express	Desktop locked ACD state
- Available: In Office Available: Out Of Office	Not Set
Available: Out Of Office Bury Unavailable Do Noto Disturb Estemal Caling Line ID Delwery Internal Caling Line ID Delwery Smultaneous Ring Caling Line ID Delwery Blocking Caling Line ID Delwery Blocking Caling Line ID Delwery Blocking	Wrap-up duration (sec) 10 Don't change my ACD state to Available until I assign a disposition code Prevent me from manually changing mv ACD state when on a call center call. Only abov the current ACD state button Z Activate sign-out ACD state when Unity is closing.
- Broadworks Mobility	When displaying ACD state
- Call Transfer Call Park Retrieve - Call Recording - Call Waiting	Show duration

5.2 Using Personal Wallboard

The Personal Wallboard will show current performance metrics for the call centers the supervisor is assigned to. The statistics are broken down by "My Statistics" which shows the supervisor's individual performance and "Overall Queue Statistics" which will show the current conditions across the entire call center[s]. The 📽 icon at the upper right hand corner of Personal Wallboard toggles between showing all call centers individually [maximized view] or a summary of all call centers combined [minimized view].

Maximized View

			My Statistics					Over Total	all Queue Sta	tistics		8
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Missed Calls	Queued Calls	Longest Wait Time	Average Wait Time	Average Talk Time
Bolts Sales	0	0	0	00:00:00	00:00	3	2	1	0	00:00	00:02	00:00
Nuts Sales	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
	0	0	0	00:00:00	00:00	3	2	1	0	00:00	00:01	00:00

Minimized View

			My Statistics					Overa	II Queue Sta	atistics		R _M
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Summary	0	0	0	00:00:00	00:00	1	1	0	0	00:00	00:00	00:04

Note: Statistics shown in Personal Wallboard reset every 24 hours at midnight.

5.2.1 Locking in Minimized State

To disable the ability to maximise and minismise the Personal Wallboard, activate "Only display summary statistics" in Settings > Call Center > Statistics as below.

0 Services & Settings	×
Services Settings Incoming Cals Anonymous Cal Rejection Cal Forward Navas Cal Forward No Answer Cal Forward No Answer ACD State Columns Reporting Reporting Reporting Cal Forward No Answer Cal F	Configure call center statistics delivery. Call center passwords (required to gather statistics) (can be entered in the Authentication section. The Clent Call Control service must be assigned to the call center if real-time statistics are required. Refresh frequency (seconds) 90 - 900 If Only display summary statistics
Abandonied Calls Comm Pilot Express Available: Doffice Available: Doffice Busy Unavailable Do Not Disturb Do Not Disturb Dist	Use scrollbars when the call center count equals 20
	X Cancel

5.2.2 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.

Statistics can be added or removed with the = + buttons and the order they are displayed, from left to right in the Personal Wallboard can be changed with the arrows. Topmost is to the left.

rivices Settings		
Incoming Calls Anonymous Cal Rejection Cal Forward Aways Cal Forward Budy Cal Forward Budy Cal Forward Budy Cal Forward No Answer Cal Center Actor State Supervisor Actor State Supervisor Common State Common State	Specify which columns should be displayed in the personal wallboard. Threshold values c also be set for many columns Agent Columns Call Center Columns Agent Activity Answered Cals Mesed Cals Total Tak Time Average Tak Time Total Cals	an
- Broadworks Anywhere - Call Transfer - Call Park Retrieve	÷ + -	đ

5.2.3 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.

Services Settings						
Incoming Calls Anonymous Call Rejection Call Forward Always Call Forward Busy Call Forward No Answer	^	Specify which columns should be displayed in the personal w also be set for many columns	rallboard	. Thres	nold value	es can
Call Center Agent		Statistic to display				
ACD State		TotalCalls				
Supervisor						
Call Center Monitoring		Column heading				
- Columns		Set threshold alert values				
Reporting		Call Center				
Abandoned Calls		All	50	30	20	10
 Comm Pilot Express Available: In Office 		Bolts Sales	20	15	10	5
- Available: Out Of Office		Nuts Sales	30	25	10	5
Busy Unavailable Oo Not Disturb External Calling Line ID Delivery Internal Calling Line ID Delivery Simultaneous Ring						
- Outgoing Calls						
Calling Line ID Delivery Blocking						
Broadworks Anywhere						
- Call Transfer						
Call Park Retrieve	¥					

Selecting "Highlight non-zero values" will cause any value over 0 to be displayed in red. This has been activated for the "Total Calls" statistic below.

Overall Que	ue Statistics	
Total Calls	Calls Answered	Total Missed Calls
0	0	0
0	0	0
6	6	0
6	6	0

5.2.4 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.

Some statistics allow a different threshold to be set per call center, for example important queues can have lower thresholds.

services Settings						
Incoming Calls Anonymous Call Rejection Cal Forward Always Cal Forward Nuey Cal Forward No Answer Cal Center	*	Specify which columns should be displayed in also be set for many columns	n the personal wallb	oard. Thi	eshold va	alues ca
🖨 Agent		Statistic to display				
ACD State		NumberOfCallsAbandoned	•]			
Columns		Column heading				
Abandoned Calls		Abandoned				
Comm Pilot Express	-	V Set threshold alert values				
 Available: In Office Available: Out Of Office 		Call Center				
- Busy		All	5	10	15	20
- Unavalable Do Not Disturb		Bolts Sales	1	2	5	10
- External Caling Line ID Delivery		NUTS Sales				
- Internal Calling Line ID Delivery						
Simultaneous Ring						
Caling Line ID Delivery Blocking						
E Call Control		-				
Broadworks Anywhere Broadworks Mobility	13					
- Call Transfer						
Call Park Retrieve						
- Call Recording - Call Waiting						

Double click an entry in the list to set overall threshold values or those for a specific call center. In the example below statistics columns have been added, some have been renamed from the default and threshold alerts have been configured.

		Ove	tics		ង	
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

5.3 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. A red icon indicates that you are not joined to that queue.

				My Statistics
Name	Total Calls	Answe Calls		Missed Calls
Bolts Sale:	-	0		0
Nuta Salar		1		0
	Call queue			0
	Join Queue			
Fre	Refresh statistics		To	
	Supervisors	•		
~	Show gridlines			

5.4 Receiving ACD Calls

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.

			My Statistics				
Name	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		Т	0		Duration		Status
0795634441	9	N	luts Sales (Nuts Sa	ales)	00:00		Ringing

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

5.5 Using Disposition Codes

Unity will expose ACD Disposition Codes as configured in BroadWorks, to supervisors within the Active Call Window. The user can enter one or more Disposition Codes by right clicking the active call and selecting from the context menu. Disposition Codes can be entered while the call is active, or immediately after, when the call has ended and before another call is answered. Only Disposition Codes configured for the queue that the supervisor has answered are displayed.

From	То	Duration	Status
0795634	Add number to personal directory	00:29	Active
	Add call note		
Contacts Call Logs	Assign disposition code	Selected call	Brochure Request
Search	Reset column widths Show gridlines	Last call between Nuts Sales 07956344419 >	Cold for other member of staff Chasing up existing ticket Cold Call
Alastair Brown	Barry Simpson 🛛 & Charlotte Quartly	🔏 Chris Tutt 🛛 🙎 CRU Test	Did not add a code French Holiday

Disposition Codes can be assigned to the previous call either by selecting Assign disposition code > Last call as above, or by right clicking in the Active Call Window post ACD call as below.

From	То	Duration	Status
	Assign disposition code	Last call between Nuts Sales 07956344419	Brochure Request
ntacts Call Logs	Reset column widths Show gridlines		Call for other member of stan Chasing up existing ticket Cold Call

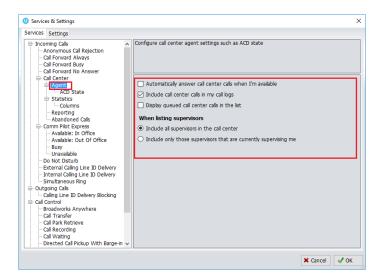
5.6 Auto Answer

Unity Supervisor optionally allows ACD calls to auto-answer when the supervisor is in the "Available" state. This is toggled on/off in Settings > Incoming Calls > Agent.

Ũ	Services & Settings
Services Settings	Configure call center agent settings such as ACD state. When listing Include all supervisors in the call center supervisors Include only those supervisors that are currently supervising Automatically answer call center calls when I'm available Display queued call center calls in the list

5.7 Supervisor Escalation

Unity Call Center Supervisor facilitates the BroadWorks call center escalation feature by allowing both standard and emergency call escalation. Both types of escalation can only be performed on call center calls and both inbound and outbound [DNIS] calls are supported. In either case, a user can only escalate a call to a supervisor if they are currently supervising them in BroadWorks. If this is not the case the user will be told [through the phone] that the supervisor is not a valid supervisor.



5.7.1 Standard Escalation

Standard escalation is used when an 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. Unity allows the call to be escalated to a specific supervisor or to the first supervisor that is available. The Agent's Unity client will automatically place the ACD call on hold, then dial the extension of the supervisor as an escalated call. This call will then appear as an escalated call in all center reports. Standard call policy/routing rules will be used when calling the supervisor, such as DND, call forwarding and hoteling guest etc. At any time, the agent can release the escalated call, or can transfer or conference both calls together if required.

5.7.2 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. 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.

5.7.3 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:

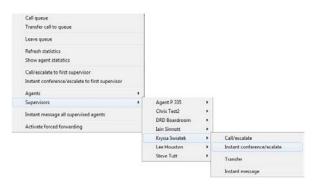
Call/escalate to first supervisor Instant conference/escalate to first super	visor			
Supervisors	•	Agent P 335	•	
Assign disposition code	•	Chris Test2 DRD Boardroom Iain Sinnott		
		Krysia Swiatek	•	Call/escalate
		Lee Houston	•	Instant conference/escalate
		Steve Tutt	•	Transfer

Or escalates the call to the first available supervisor.

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

5.7.4 Escalation via Personal Wallboard

The supervisor can escalate a call center call by using the context menu displayed when rightclicking on the call center in the personal wallboard, as shown below. This assumes that Unity has logged in as the call center and is displaying statistics in the personal wallboard.



Please note that if the supervisor right-clicks on a different call center in the personal wallboard [to the one that the call was routed through] then the call escalation options will not be displayed.

5.8 Activating Outbound DNIS

If the supervisor is a member of BroadWorks call center premium queues, and the DNIS capability has been configured, then the user can select an outbound DNIS which will determine which outbound CallerID is presented when the supervisor makes external outbound calls. Right click the Dial icon and mouse over "Change Outbound Number" at the bottom [the numbers above are a clickable list of last 10 numbers for redial]. The outbound DNIS that are available are presented. The currently selected outbound DNIS is ticked. This will affect all outbound calls until the outbound DNIS setting is changed, or set to none.

Release	8	Vocemal	Recording Cal	park Announce	ļ
Name Total	Chri: 0207 0012	tal Talk Time	Average Talk Time	Total Calls	Ant
Botts Sales Nuts Sales	0013	0:00:00	00:00	0	
	0012	0.00.00	00.00	0	
From	Chae Conference Rictor		Duration		5
	Change outbound number •		s Sales (Bolts Inte		
Contacts Call Logs		Nut	s Sales (Nuts Inte s Sales (Nuts UK)	Contraction of the	
Search	C A B C	V Nor			1

5.9 Personal Statistical Reports

Unity Supervisor provides access to the following agent reports (refer to section 6.8 for Supervisor reports):

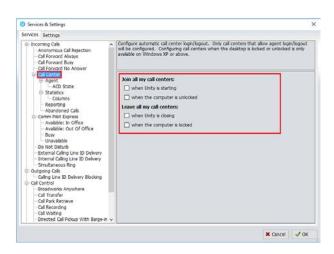
Agent Activity Detail Report Agent Activity Report Agent Call By Skill Report Agent Call Detail Report Agent Call Report Agent Duration By Skill Report Agent Duration Report Agent Sign In Sign Out Report

To access these reports, click the Reports button or select Tools > Call Centers > Report Viewer from the menu. Specify the reporting period, click Tools > Call Centre > Report Viewer. From the Report Viewer interface [shown below] select the desired report and reporting period.

Report Viewer			100	×
Report	Agent Activity De	tai Repo	rt.	
Start Period	Wed, 27 Jul	- (B) •	00:00	~
End Period	Wed, 27 Jul		14:15	~
Output Type	PDF			

5.10 Pre-configuration of ACD State

Unity Supervisor offers a cascading hierarchy of supervisor availability settings that control the supervisor's join and ACD status depending on the status of the host computer. This is in Settings > Services > Incoming Calls > Agent.



In additon, the ACD state can be configured for computer startup and unlock state, postcall state and desktop locked state.

Services Settings		
Incoming Calls Anonymous Call Rejection Call Forward Always Call Forward Busy Call Forward No Answer Call Center	Configure cal center agent settings su	
Anent Anoster	Startup & desktop unlocked ACD sta	f.e.
Statistics	Not Set	~
Columns	Post call ACD state	
- Reporting - Abandoned Calls	Not Set	*
El-Comm Plot Express	Desktop locked ACD state	
- Available: In Office - Available: Out Of Office	Not Set	~
Addams. Dut of Unice Addams. Dut of Unice Uniceable Uniceable District Cale Line 3D Delivery District Cale Line 3D Delivery District Cale Line 3D Delivery District Cale Cale 3D Delivery Cale Cardod Cale Cardod District Delivery Cale Cardod Cardod Cardod Cardod Cale Car		5770TV

6 SUPERVISOR FUNCTIONALITY

6.1 Remotely Changing Agent State

The supervisor can change the agent's availability to the call center either from the Personal Wallboard, Tools menu or Agent Activity tab. The actions that are available are forcing the agent to Join or Leave specific queues and changing their ACD state, including the unavailable reason code if applicable. The supervisor can also specify an Unavailable code when selecting this state and Call or Instant Message the Agent from the drop list.

When providing the option to change a monitored agent's ACD state or joined status, Unity will show if the agent is currently joined to the queue and what the current ACD state is, as shown below.

•	Join Queue	
	Leave Queue	
•	Sign In	
	Available	
	Unavailable 🕨 🕨	Clearing Tickets
	Wrap-Up	Comfort Break
	Sign-Out	Lunch
	Silent monitor	Paperwork
	Call extension	Technical Support & Testing Training

6.2 Remotely Changing Agent State from Personal Wallboard

Right clicking any queue in the Personal Wallboard will present a drop list of options. Hover over "Agents" to see a list of all agents assigned to the selected queue. Hovering over the agent in turn will present the supervisor options to Join/Leave the agent from the queue and change their ACD State.

Name		Total Calls	Answered Calls		Missed Calls	Tota	l Talk	Time	e Average Talk Tin	ne
Bolts Sal		Call queue			0	C	0:00:	00	00:00	
Nuts Sale		Call queue			0	0	0:00:0	00	00:00	
		Join queue			0	0	0:00:0	00	00:00	
		Refresh statistics								
From		Show agent activity			То					
		show again activity								
		Supervisors		>						
		Agents		>	Andrew Toda	ł	>		Join Queue	
		Instant message all s	upervised agents		Barry Simpso	n	>	•	Leave Queue	
		Activate forced forwa	arding		Charlotte Qu	artly	>		Sign In	
					Chris Tutt		>		Available	
	~	Show gridlines		_	Jenna Wimsh	urst	>		Unavailable	,

6.3 Remotely Changing Agent State from Agent Activity Tab

To display an agent's queue membership and their current status, click the "Agents" radio button in the Agent Activity tab and select from the drop list. Right clicking an individual queue allows the supervisor to Join/Leave the agent to/from each queue or to change their ACD state for all queues that the agent is a member of.

Contacts Call Logs Voicer	nail Abandoned Calls Agent Activity				
Agent Chris Tutt	✓ ○ Que	ues 💿 Agents			
Name	Status	ACD State	ACD Duration	Total Calls	Missed Calls
& Bolts Sales		Sign-Out	01:07:06	0	0
Nuts Sales		Sign-Out	01:07:06	0	0

Contacts Call Log	s Voi	cemail Aband	ioned Calls A	gent Activity	
Agent Chris	Tutt		~	O Queues	Agents
Name			Status		ACD State
Left Bolts Sales	•	Join Queue Leave Queue			Sign-Out Sign-Out
		Sign In Available Unavailable Wrap-Up		>	
	•	Sign-Out			

6.3.1 View Satistics and Set Thresholds Against Agents

All statistics in the Agent Activity tab are configurable and allow thresholds to be set against them. To add and remove statistics in the Agent Activity tab go to Settings>Statistics>Columns>Agent Activity. To set thresholds against a statistic, double click it and set the values.

Bronney Cals Anonymous Call Rejectory which columns should be displayed in the personal walboard. Threshold values call is be set for many columns Gel Forward Newsy Cel Forward Newsy Cel Forward Newsy Call Center Agent Columns Call Center Columns Call Center Columns Superviser Agent Columns Call Center Columns Call Center Columns Superviser Agent Columns Call Center Columns Superviser Agent Columns Call Center Columns Agent Activity Status Actor Data Superviser Agent Columns Call Center Columns Agent Columns Superviser Agent Columns Superviser Agent Columns Superviser Agent Columns Superviser Agent Columns Call Center Montoring Superviser Assubble: Dut Of Office Busy Unavailable Control Superviser Call Centrel Call Centrel Superviser Superviser Call Centrel Superviser Superviser Superviser Call Centrel Superviser Supervise	envices Settings		
Agent Agent AcD State Superviser AcD State	Anonymous Call Rejection Call Forward Always Call Forward Busy Call Forward Busy Call Forward No Answer	also be set for many columns	can
AD State Supervisor AD State AD State AD Duration Tratal Cals Mused Cals Tratal Tak True Aspacting Auditation A		Agent Columns Call Center Columns Agent Activity	
Supervisor ACD State Acd Acd Acd Acd Acd Acd Acd Acd Ac		Status	
Colorente Mentoring Subjects Su		ACD State	
Anabote Cab Toral Tak Time Toral Tak Time Toral Staffed Time Anabote Cab Toral Staffed Time Anabote: Out Of Office Bay Unavable Do Not Daturb Do No		ACD Duration	
Truehold Alerts Total Tak Time Reporting Total Staffed Time Anadored Cab Comm Pick Express Available: In Office Available: In Office Bury Unavailable Do Ink: Douber Douber Strema Camp Line ID Dehrery Strema Camp Line ID Strem		Total Calls	
Reporting Abaldowed Cab Total Staffed Time Available: Dot Of Office Buy Unavailable Do Not Districh Do Not Districh Delvery Struttaneous Ring Cutions Cab Colling Line 1D Delvery Struttaneous Ring Cutions Ring Call Crister Call Transfer Call Transfer	Columns	Missed Calls	
Abandonéd Cals Comm Pick Dayres Available: In Office Available: Out of Office Usay Unavailable Do Nick Dokud		Total Talk Time	
Comm Piet Express Avables: Doffice Avables: Doffice Dury Unavable Doffice Dury Unavable Doffice Dury Dury Dury Dury Dury Dury Dury Smutaneous Ring Outagin Call Delvery Smutaneous Ring Call Transfer Call Transfer		Total Staffed Time	
- Available: Du Office - Available: Out Of Office - Builde: - Do Not Disturb - Do Not Disturb - Do Not Disturb - Dating Line ID Delivery - Simulaneous Ring - Outpoing Calls - Outpoing Calls - Outpoing Calls - Call Transfer - Call Tr			
Available: Out of Office Use o			
Oravalable De Neto Dotuch De Neto Dotuch Determal Calina Line ID Delvery Simplaneous Ring Outpong Calis Caling Line ID Delvery Blocking Cali Control Broadwords Anywhere Cali Tranfer			
De hiet Disturb Debrery Debrery Debrery Smallneous Ring Octoorin Cab Calling Line ID Debrery Smallneous Ring Calling Line ID Debrery Biodownis Anywhere Call Transfer			
External Caling Line ID Delviery Simulation Line ID Delviery Simulation Line ID Delviery Caling Line ID Delviery Blocking Cali Cantrol Broadworks Anywhere Cali Transfer			
Enternal Caling Line ID Delivery Smolaneous Ring Octoons Cali Caling Line ID Delivery Blocking Cal Control Biosodivoria Anywhere Call Transfer			
Smokineou Ring Outoping Cale Caling Line ID Delivery Blocking Cal Cantrol Broadworks Anywhere Cal Transfer			
Outgoing Cals - Caling Line ID Dehreny Blocking Cal Control - Broadworks Anywhere - Cal Transfer		-	
Cal Cartol Cal Tansfer Cal Tansfer			
Broadworks Anywhere Cal Transfer			
Cal Transfer			
Cas Faix Neurove		🗌 Show summary row in list 🛛 🕹 🌚 💻	
	Call Park Retrieve		-

6.3.2 Changing The Agent's Icon In The Agent Activity Tab

The Agent's icon in the Agent Activity tab can be based on a range of states, for example, JoinedState which displays either red or green to represent whether the Agent is joined to the Call Center or not.

ntacts Call Logs Voicemail Aba	ndoned Calls	Agent Activity	
Queue Bolts Sales		✓	ents
Name	Status	ACD State	ACD Duration
Andrew Todd		Unavailable (Clearing Tic	05:46:25
Charlotte Quartly		Sign-Out	00:02:22
Chris Tutt		Sign-Out	45:06:53
Jenna Wimshurst		Sign-In	00:00:58
Steve Tutt		Sign-In	00:37:17
Barry Simpson		Available	2324:59:39

This is configured in Settings>Supervisor>Agent activity image based on, as shown below.

rvices Settings		
Vices Settings - Anonymous Call Rejection - Call Forward Busy - Call Forward Nuxy - Call Forward No Answer - Call Center - Call Center - Call Center - Call Center - Conter - Conter - Conter - Reporting - Reporting - Reporting - Reporting - Abandoned Calls - Comm Pile: Dut Office - Available: Dut Office	Configure call center supervisor settings. Individual alerts thresholds are reached. The Client Call Control service mu order to show queued calls. Automatically add all agents to my supervised agent Show queued calls in my current call list Only include my supervised agents in the staffed ration Agent activity image based on JonedState AnotAlState AtodAlState Avability TO Take Calls	ust be assigned to the call center in
Busy Unavailable Do Not Disturb External Caling Line ID Delivery Internal Caling Line ID Delivery Smutharous Ring Outgoing Calis Outgoing Calis		
Calling Line ID Delivery Blocking Call Control Broadworks Anywhere Call Transfer Call Park Retrieve		

6.4 Remotely Changing Agent State from Tools Menu

Clicking Tools > Call Centers will list the call centers currently being supervised. Mouse over a call center > Agents to change the agent's ACD state.

File Messaging	To Call cer	ters	>	Report Viewer		1 Color								
00	Setting			Bolts Sales	>	Ø.								
avalatie Avalatie	Wap-up Release	Dial Transfer	Hold Confer	Nuts Sales)	Call queue								
			My Statis	Qudo Support VanillalP Support	> >	Join queue					Overall G	Jueue		
			-	tunner support	1	Supervisors	>							
Name	Total Calls	Answered Calls	Missed Call	s Total Talk Time		Agents	,	Barry Simpson			Join Queue			
Bolts Sales	0	0	0	00:00:00		Instant message all supervised agents		Chris Tutt	>	•	Leave Queue			
	0	0	0	00:00:00		Activate forced forwarding		Colin Farrant David Higgins	>	_	Sign In			
From				То		То			Ds	Dean Thompson Iain Sinnott Jenna Wimshurst		> Unavail Virap-U	Available Unavailable Wrap-Up Sign-Out	>
								K 5 Matthew Steve Tutt	>		Silent monitor	,		
										ł	Call			

6.5 Threshold Alerts

Thresholds allow the supervisor to configure performance triggers against various parameters for all the queues they are supervising. These will not affect the call handling and construction of the queue, but are designed as a warning that the call center is experiencing abnormal behaviour and allowing the supervisor to take remedial action.

6.5.1 Configuring Thresholds

Click Settings [button] > Services [tab] > Statistics> Columns > Call Center Columns – double click the statics (e.g. total calls) to set thresholds. Different thresholds can be set for all queue parameters for different call centers, or all call centers can have the same threshold. Double click the boxes to populate the threshold value. Tick ok to confirm.

ices Settings						
Guerrisor	^	Specify which columns should be displayed in the po also be set for many columns	ersonal wallbo	ard. Thre	shold value	es can
Reporting Abandoned Calls		Statistic to display				
Comm Pilot Express		TotalCalls				
Available: In Office			~			
Available: Out Of Office		Column heading				
Busy Unavailable						
Do Not Disturb		Set threshold alert values				
External Calling Line ID Deliver		Call Center				
- Internal Calling Line ID Deliver	y	All				
Outgoing Calls		Bolts Sales				
Calling Line ID Delivery Blockin	a	Nuts Sales	2			
Call Control	-	Qudo Support				
Broadworks Anywhere		VanilaIP Support		5		
Call Transfer Call Park Retrieve						
- Call Recording						
- Call Waiting						
- Directed Call Pickup With Barg	e-in					
Hoteling Guest						
Remote Office						
Messaging						
Voicemail	~					

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

6.5.2 Alerting Options – Dialogue Box and Email

Unity Supervisor will pop-up a dialogue box indicating the threshold that has been breached.

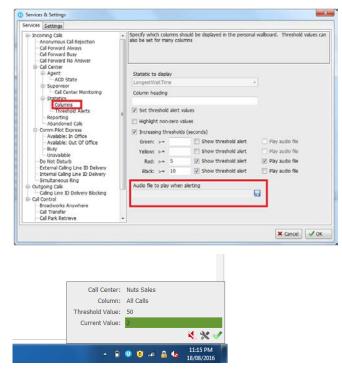
Threshold Alert	×				
The below threshold has been breached. Please either change the threshold values or change the call center configuration.					
Call Center	Support				
Column	Total Calls				
Threshold Value	6				
Current Value	7				
	💐 Ignore X View 🗸 Close				

Supervisor can also be configured to show the alert in a toast notification, as shown below.

Incomp Calls Configure how Unity will display call center alerts Anonymous Call Rejection Configure how Unity will display call center alerts Call Forward How Call Forward Ito Call Center	s as well as the default audio notification to
Autoriae Agent Carlie Agent Carlie Agent Carlie Agent Carlie Supervise Call Center Montoring Call Center Montoring	*

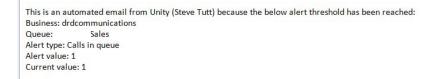
An audio alert can be set and used as a default, however this can be overridden for specific threshold values, as shown below.

Please note: An audio alert can only be set if a visible alert has been set.



Audio and visual threshold alerts will only be activated if the applicable checkbox is checked in the threshold, so for example you can configure Unity to only play an alert if the red threshold value is reached.

Where the "Send email to" field has been populated, Supervisor will send an alert by email as below.



6.6 Silent Monitoring

Allows the supervisor to silently monitor the next call or calls taken by a specified agent. Requires the Call Center Monitoring service assigned to the Supervisor in BWKS. Requires Call Center Agent Premium call center.

To activate Silent Monitoring, right click the call center queue in Personal Wallboard > select the agent > select Next Call Only or All Calls.

Name	Total Calls	Answered Calls	Mi	ssed Calls Total	Talk Tir	ne	Average Talk Tim	e	Total Calls	Calls A
Bolts Sales	0	0		0 00	:00:00		00:00			
Nuts Sales	Call queue			0 00	:00:00		00:00		0	
	Join queue			0 00	:00:00		00:00		0	
From	Refresh statistics			То						Dura
	Show agent activ	rity								
	Supervisors		>							
	Agents		>	Andrew Todd	>		Join Queue			
	Instant message	all supervised agents		Barry Simpson	>	٠	Leave Queue			
	Activate forced f	orwarding		Charlotte Quartly	>		Sign In			
~	Show gridlines			Chris Tutt Jenna Wimshurst	>		Available Unavailable			
Contacts Call L				Steve Tutt	>		Wrap-Up	>		
Gan Ed	ogs voicemail Ab	andoned Calls Agen	ACTIVITY			٠	Sign-Out			
Search		٩					Silent monitor	>	Current call	
Name			Ph	ione			Call		Next call only	
💄 Alastair Brow	/n		02	082881268		_	Can	_	All calls	
🔍 Andrew Todd			01	444220203				Site		

Silent Monitoring Warning Tone

The supervisor can optionally play the agent a tone to alert them that they are being monitored. This can be toggled on/off in Settings [button] > Settings [tab] > Supervisor.

ervices Settings		
Incoming Cals Incoming Cals Incoming Cals Incoming Cals Cal Forward Always Cal Forward Neway Cal Forward Neway Cal Forward Neway Cal Center AcD State Supervisor La Conter Monitoring Statistics Columns Threshold Alerts Reporting Available: 10 Office Available: Out Of Office Busy Unavailable Onfice Control Iosturb External Caling Line ID Delivery Simultaneous Ring Outgoing Cals Control Bradworks Anywhere Call Transfer Call Transfer	Configure call center monitoring to alert the agent when they are being m	ontored.

6.7 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.

Statistics can be added or removed with the = buttons and the order they are displayed, from left to right in the Personal Wallboard can be changed with the arrows. Top most is to the left.

Services Settings			
Services Settings Services Settings Anonymous Cal Rejection Call Forward Narys Call Forward Nurves Call Center Cal	~	Specify which columns should be displayed in the personal wallboard. Threshold values can also be set for many columns Agent Columns Call Center Columns Agent Activity Answered Cals Mised Cals Total Tak Time Average Tak Time Total Cals	
Do Not Disturb External Caling Line ID Delivery Internal Caling Line ID Delivery Simultaneous Rhg Outgoing Calis Caling Line ID Delivery Blocking Cali Ontrol Broadworks Anywhere Cali Transfer Cali Transfer	<		

6.8 Running Reports

Unity Supervisor provides access to the real-time and historical reports provided by the BWKS DBS reporting server. The information in these reports is entirely produced by BWKS. To access reports click Tools > Call Centre > Report Viewer.



From the Report Viewer interface, select the desired report in the "Template" drop list.

Report	Abandoned Call Report	
Start Period	Wed, 27 Jul 🗍 🐨	00:00 ~
End Period	Wed, 27 Jul 🛛 🕞 +	16:30 ~
	Real-time report	
Sampling	15 Minutes	~
Filter Type	Call center	
Fiters	All call centers Bolts Sales Nuts Sales	
Abandoned Call Threshold		
Service Level		
Output Type	PDF	

Supervisor reports include:

Abandoned Call Report Agent Disposition Code Report Agent Summary Report Agent Unavailability Report Call Center Call Detail Report Call Center Disposition Code Report Call Center Incoming Calls Report Call Center Overflow Matrix Report Call Center Presented Calls Report Call Center Report Call Center Summary Report Service Level Report

6.9 Adding Agents to Monitored Agents List

By default, Unity Supervisor will take use of the list of supervised agents from BWKS. To monitor a specific subset of the total agents, go to Settings [button] > Settings [tab] > Supervisor and uncheck "Automatically add all agents to my supervised agent list" and restart Unity.

ervices Settings		
Incoming Calls Anonymous Call Rejection Call Forward Always Call Forward Busy Call Forward No Answer	Configure call center supervisor settings. Individual alerts can thresholds are reached. The Client Call Control service must be order to show queued calls.	iso be set when overall queue assigned to the call center in
Cal Center Agent	Automatically add all agents to my supervised agent list	1
- ACD State	Show queued calls in my current call list	-
- Cal Center Monitoring	Only include my supervised agents in the staffed ratio	
Statistics Columns	Agent activity image based on	
- Threshold Alerts	AvaiabiityToTakeCals v	
- Reporting Abandoned Calls		
Available: In Office Available: Out Of Office Busy Unavailable		
Do Not Disturb		
- External Calling Line ID Delivery - Internal Calling Line ID Delivery		
Simultaneous Ring		
- Outgoing Calls Calling Line ID Delivery Blocking		
Call Control Broadworks Anywhere Call Transfer		
Call Park Retrieve		

Right click the call center queue in Personal Wallboard, select "Modify supervised agent list" and add the agents you want to supervise.

Name	То	otal Calls	Answered Calls	Missed (
Bolts Sales		0	0	0
Nuts Sales		0	0	0
VanillalP Support		0	0	
		Call queue		
		Join queue		
From		Refresh statis	tics	
		Show agent a	activity	
		Supervisors		>
		Agents		>
		Instant messa	age all supervised ager	nts
	_	Modify super	rvised agent list	
		Activate force	ed forwarding	
Contacts Call Logs	Vc 🖌	Show gridline	es	

Supervised Agents in Staffed Ratio Statistic 6.10

The supervisor can optionally configure the "Staffed Ratio" statistic so that it only shows agents that are being supervised. In Settings [button] > Settings [tab] > Supervisor – check "Only included my supervised agents in the staffed ratio". This means that even if there are hundreds of other agents available in the queue, the supervisor will only see how many of the agents they supervise are available in each queue through the staffed ratio statistic.

ervices Settings		
Incoming Cals Incoming Cals Incoming Cals Call Forward Always Call Forward Nuays Call Forward Nuays Call Forward Nuay Call Center Columns Columns Call Center Call Cournalble: Conrol Disturb Caller Calle Calling Line ID Delvery	Configure cal center supervisor settings. Individual alerts can also I thresholds are reached. The Clent Cal Control service must be ass order to show queued cals. Automatically add all agents to my supervised agent list Show queued cals in my current call list Only include my supervised agents in the staffed ratio Agent activity image based on AvailabilityToTakeCalls	
 Internal Calling Line ID Delivery Simultaneous Ring 		
Outgoing Calls		
Calling Line ID Delivery Blocking		
Broadworks Anywhere		
- Call Transfer		
Call Park Retrieve		

CALL CONTROL 7

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. When an inbound call is ringing Answer becomes the valid option. Once the call is active the icon will toggle to Release as hanging up is the only valid option.

7.1 Making a Call

7.1.1 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. The desk telephone will default to using hands-free speakerphone. If the telephone does not support speakerphone, you will need to lift the handset when the call is answered.

Dial	×
Number	1330
	🗙 Cancel 🗹 OK

7.1.2 Using the Contacts Panel

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

0 -	A	
ě	Call extension	
0	View user details	
	Add note	
	Instant message	
_	Personal directory	•
	Manage user list	
	Appearance	•

7.1.3 Drag and Drop

Right click a user icon on the Contacts panel and drag the icon up to the Active Call Window. This will open a call to that user. Calls can also be dragged from the Active Call Window onto a call center to perform a blind transfer. Calls dragged onto a monitored user will either be blind transferred or present options depending on the user preferences in Settings and whether the monitored user is engaged or not. For engaged contacts, park, camp-on and transfer to voicemail are available. For available contacts transfer to extension, transfer to mobile, transfer to voicemail or present call hold, camp on and transfer are available.

Lewis Marc		
Steve Tutt	Transfer call to extension	
	Transfer call to mobile	
	Transfer to voicemail	

7.1.4 Using Directory Search

Enter the search field in the Contacts panel to dynamically search all internal users and speed dials. Either right click and select "Call extension" or right-click and drag the icon into the Active Call Window to make the call.

7.1.4 Dialling from the clipboard

Any number that is copied to the Windows clipboard, (highlight the telephone number, right click, then clicking copy) this will cause a popup toast above the system tray with the option to call the number. Click the toast notification to make the call. This feature can be enabled/disabled in Settings. When a number is copied to the clipboard, Unity can show a prompt to the user which appears over all applications, rather than show a toast notification. This can be configured through Settings-Settings tab>Clipboard Integration.

7.2 Answer a Call

When Unity displays an inbound call, click the Answer icon for double click the call in the Active Call Window to answer the call. Your desk telephone will now be on hands-free speakerphone, if it supports this feature with Unity. If there is an active call in progress, you will need to click the new inbound call in the Current Call List before clicking Answer, this will automatically place the first call on Hold. Please note that answering a call by lifting the handset on the desk phone will have the same effect as clicking Answer in Unity.

7.3 End a Call

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

Note: Replacing the telephone handset will also end the call, which will then be removed from the Active Call Window.

7.3 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.



7.4 Send Call to Voicemail

To send an inbound caller directly to your voicemail click the Voicemail button . Please note that if voicemail is not assigned or is disabled, the button will still be visible but inactive.

7.4.1 Retrieving Voicemail Messages via VoiceMail Button

When no calls are currently selected, clicking the Voicemail button will dial the user into their voicemail. The phone will default to hands-free speaker phone if it has this capability.

7.4.2 Retrieving Voicemail Messages via Voicemail tab

Clicking into the Voicemail tab will display a list of voice messages with the most recent at the top. Double click an entry to play through the PC's default media player. Right click to save locally or delete. In order for the Voicemail tab to appear, Supervisor must be configured for "Use unified messaging" and "Show visual voicemail tab" in Voicemail settings as below.

Services & Settings		
rvices Settings		
Cal Center Agent - ACD State Statistics - Columns - Reporting	Configure your personal voice messaging.	
- Abandoned Calls	Enabled	
- Available: In Office	Use unified messaging	
- Available: Out Of Office	Use phone message waiting indicator	
Day Unavalable Do Not Disturb Do Not Disturb Do Not Disturb Thermal Caling Line 1D Delivery Internal Caling Line 1D Delivery Simultaneous Ring Outgoing Calis Cali Control Rinadworks Anywhere Cali Transfer Cali Transfer Cali Recording Ort Cali Recording Ortexted Cali Pickup With Barge-in Moteling Guest.	Show visual voicemail tab	
	O Forward the voicemail via email	
	Email notification of new voicemails	
	Email a copy of the voicemail	
	Cherra copy or the volceman	
	Transfer from voicemail on zero	
	Send all calls to voicemail	
 Remote Office Shared Call Appearance 	Send busy calls to voicemail	
- Meccaging	Send unanswered calls to voicemail	
Voicemail		
		X Cancel J OK

7.5 Transferring a Call

There are two ways to transfer a call; Announced Transfer, where you introduce the call to the receiving party before putting the call through, and Blind Transfer, where you transfer the caller

directly to a recipient without introducing the call. Please note that calls can be transferred both to internal users and external contacts.

7.5.1 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. Both calls will now disappear from the Active Call Window.

Note: The user is not limiting to transferring received calls. They can make two outbound calls and then use transfer to "bridge" them together.

Calls can also be transferred together by dragging one call on top of another within the Active Call List

Example 1 - Transfer with two live calls

available	Available \	Vrap-up	Release					to Charlotte Quartly	
			Release	Dial	Т	Transfer Charlotte Quartly	•	to number	
From				То			Duratio	n	Status
07956	5344419	Steve Tutt				01:39		On hol	
Steve	Tutt			Char	lotte Qua	artly	00:23		Active

Example 2 - Transfer with four live calls

File	Tools Help	ERC ERC ERC ERC ERC ERC ERC ERC ERC ERC	Transfer 07056344419		to 07	P 7956344419	
0	From 07956344419 07762017263	To Steve Tut Steve Tut	I ransfer Charlotte Quartly	+ +	to C	ot Desk 3 - 91 harlotte Quar	
0	Hot Desk 3 - 9103 Steve Tutt	Steve Tut Charlotte		00:19 00:12		umber	Active

7.5.1.1 Warm Transfer

Unity Supervisor 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, automatically disappearing from your active call window.

	Alastair Brown		020				
	Charlotte Quartly						
	Chris Tutt		1020				
2	Colin Farrant	Call extension	201				
2	Dave Dadds	Transfer call to extension	201				
8	Dean Thompso		201				
2	Harry Dadds	Warm transfer call to extension	201				
2	lain Sinnott	Park call on extension	20(
	John Lowloop		- 101				

7.5.2 Blind Transfer

7.5.2.1 Using Contacts Panel Drag and Drop

Unity Supervisor 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 supervisor is configured as an supervisor with call center queues].

Note: Unity can be configured to display a menu when dropping a call onto a user icon. If no menu options are selected the blind transfer is performed. If menu options are selected, click "Transfer call to extension" to also perform blind transfer. For more information on Drag & drop refer to section 9.



7.5.2.2 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 Wainwrigh
	Number 013598		
	X Cancel 🗹	ж	

7.5.2.3 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

7.5.3 Transfer to Voicemail

The option to Transfer to voicemail is valid only for internal company users that have Voicemail assigned and activated.

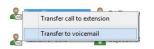
7.5.3.1 Using Contacts Panel Right Click - Voicemail

While on an active call, right click a user in the User Status list and select "Transfer to voicemail". This will send the selected call directly to the destination extension voicemail without introducing ringing.



7.5.3.2 Using Drag and Drop

If configured, Unity will display "Transfer to voicemail" in the list when an active call is dragged onto the destination user icon in the Contacts panel. For more information, refer to section 9.



7.5.4 Transfer to Mobile

If the destination user has a mobile number entered as part of their profile in BroadWorks, you have the option to right click and select either Dial Mobile [to perform an announced transfer] or Transfer Call to Mobile [to perform blind transfer].

7.5.4.1 Using Contacts Panel Right Click - Mobile

Right click the desired user in the Contacts panel. To announce the call, click Dial Mobile. Once

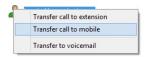
the recipient answers, click Transfer seal and select the context menu option to transfer the calls together.

To blind transfer the call without introduction click Transfer call to mobile.

Call extension
Park call on extension Transfer call to extension
Call mobile
Transfer call to mobile
Transfer to voicemail
View user details

7.5.4.2 Using Drag and Drop

If configured, Unity will display "Transfer to mobile" in the list when an active call is dragged onto the destination user icon in the Contacts panel. For more information, refer to section 9.



7.7 Call Hold/Retrieve

The Hold/Retrieve \bigcirc 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. When a call is on Hold, the blue Hold icon is shown in miniature to the left of the call in the Active Call Window and the status is On Hold, as shown below.

	From	То	Duration	Status
0	Chris Tutt	Andrew Smith	00:15	On hold
_				

7.7.1 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 Current Call List and there will be an On Hold icon alongside the call.

7.7.2 Retrieving a Held Call

Click the held call in the Current Call List to select it. Click the Retrieve button set to take the call off hold, you can also double click the call to retrieve it. Please note that any other active calls

will be placed on hold before the selected call is retrieved, meaning you can toggle between call by double-clicking them in the Active Call Window.

7.7 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.

7.7.1 Starting a Conference Call

Once an active call is established [that you have either made or received] call a second person.

You can do this by clicking the Dial button or double clicking a user in the Contacts panel or Search, or Call Log lists. Making this call will automatically place the first caller on Hold.

Once the second party has answered the call, click the Conference button and a new conference will be created between you and the other two parties. This is represented in the Active Call Window as shown below:

From	To	Duration	Status	
🔆 Chris Tutt	Andrew Smith	00:13	Active (conference)/Not recording	
불 Chris Tutt 봄 Chris Tutt	Barry Simpson	00.07	Active (conference)/Not recording	

Selecting either call and clicking Hold will place the conference call on hold, during which time the other callers can still talk to each other.

	From	То	Duration	Status
0	Chris Tutt Chris Tutt	Andrew Smith	00:34	On hold (conference)
0	Chris Tutt	Barry Simpson	00:27	On hold (conference)

7.7.1.1 Adding Multiple Parties

Once you have a conference established you can add additional parties by calling them. This will

place the existing conference on hold. Now click the Conference button 2. You will be prompted to add the new party to the existing conference as below.

0	From Charlotte Quartly	To Steve Tutt	Duration 31:32	Status On hold (conference)
ŏ	Steve Tutt		03:59	,
w		Dean Thompson		On hold (conference)
	Steve Tutt	Harry Dadds	00:24	Active
			Unity	×
	ntacts Call Logs (1 Missed) Search		ou want to add Harry Dadd	s to the conference?

Please note that conference calls can be started with any two remote calls, regardless of the direction of either call or if the number is internal or external [for example between two mobile calls].

7.7.2 Ending a Conference Call

To remove a caller from the conference call but continue speaking to the other caller[s], simply

select the call to release in the Active Call Window and click the Release button as you would normally. This will release the selected party and will show only the remaining party[s] in the Active Call Window.

To end a conference call but leave the two remote parties in conversation with each other, click the Transfer button and select the "leave conference" menu option, as shown below.



7.7.3 Conference Bridge Integration

Unity allows the user to right click the Conference button to view or copy details of their "reservation less" conference bridge(s), or to call a bridge as a moderator. If this has been configured in BroadWorks.



7.8 Call Recording

If the Call Recording User service is assigned then the user may be able to manage call recording, although this depends on the functionality offered by the VoIP platform and service configuration parameters. If this service isn't assigned, then the Call Recording button is not displayed in the main window.

7.8.1 Changing the Call Recording Option

Right-click the Recording button to select the call recording option, as below. Please note that depending on permissions this may not be available.



Call Recording options are:

Option	Description
Always	Calls are automatically recorded from the beginning of the call. There is no option to pause or stop recording.
On Demand	Calls are not automatically recorded from the start, but recording can be started at any time during the call in which case the entire call will be recorded. Stop and pause are not available with this option.
Never	Calls are never recorded and recording cannot be started while a call is in progress.
Always with Pause/Resume	All calls are automatically recorded from the beginning of the call, but recording can be paused and resumed, which is especially important when taking credit card details over the phone [that need to be omitted]. This will still result in a single recording for the call, regardless of how many times it was paused and resumed.
On Demand with User Initiated Start	Calls are not automatically recorded from the start, but recording can be started at any time. However, any conversation before the recording was started will not be included in the recording. Recording can be paused and resumed, which will result in different recordings being created for a single call.

7.8.2 Controlling Call Recording

You can start, stop, pause and resume call recording depending on the Call Recording Option currently selected. Left-click the Recording button to manage recording for the selected call in the Active Call Window will toggle the option depending on the current recording state. The call

recording button will change et as Always with Pause/Resume,

the user can left click to Pause/Resume and the button will toggle as Resume [recording]

Pause 🤐.

When set as "On Demand With User initiated Start" left clicking the call recording button presents the following menu to allow the user to control the call recording behaviour. Click the Recording button again to continue/restart recording the call.

The Active Call List will also indicate the recording state of all calls, as shown below.

From	То	Duration	Status
Chris Tutt	Barry Simpson (0003)	00:19	Active/Recording paused

8 ACTIVE CALL WINDOW

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

8.1 Window Layout

	From	То	Duration	Status
0	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 if it is matched in the Group/Enterprise directory, Personal Contacts or Outlook Contacts.

To – This field displays the name of the user, hunt group or call center that has been called ensuring the call can be answered appropriately.

Duration – This displays the total time elapsed since the call was first answered. The timer does not restart when the call is placed on hold.

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

Users can optionally see all calls in queue for the Call Centers they are joined to, as shown below. This is configured in Settings>Supervisor>Show queued calls in my current call 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

8.2 Managing Multiple Calls

To manage a particular call, first select it by clicking it in the Current Call List. If there is only one call in the list it will be selected automatically. You can then use the call control buttons to perform different actions on the call. There is no limit to the number of calls that can be displayed in the Current Call List, this is limited by the number of simultaneous calls allowed and if the Call Waiting user service is assigned and active.

You can also double-click an incoming [unanswered] call to answer it, or to retrieve it if currently on hold.

8.3 Resizing the Current Call List

The bottom border of the Current Call List can be dragged down to display as many or as few calls as necessary. Unity will save these dimensions when closed. Unity can automatically resize itself to include all calls, as well as group waiting and queued [if applicable] calls together, as shown below.

- Skin - Contact Search Contact Deplay Current Cali	Configure how Unity displays calls in the current call list	
ComputeryInder Intégration Collection Colle	Reste the current call ist to ensure all calls are visible Group wathing calls together Group queued calls together	

From	То	Duration	Status
Current			
Andrew Smith	Chris Tutt	00:32	Active/Not recording
Waiting Barry Simpson			
Barry Simpson	Chris Tutt	00:43	On hold

8.4 Assigning an Account Code

Account codes can be assigned to a call through the Active Call Window as shown below, please note that Unity must place the call on hold in order to assign the account code, then will attempt to retrieve the call although this isn't always possible in which case the user must retrieve the call using the phone.

From	То		Duration		Status
Andrew Smith	Chris Tutt	_	00:11		Active/Not recording
			Assign call to account code	•	Company B
		_	Add number to personal directory		Company A
			Instant message		
			Reset column widths		
			Show gridlines		

Unity will display a notification to indicate that the call was successfully assigned to the account code

Í	Unity & X Call(s) assigned to account code (Company A)
	-

9 DRAG AND DROP

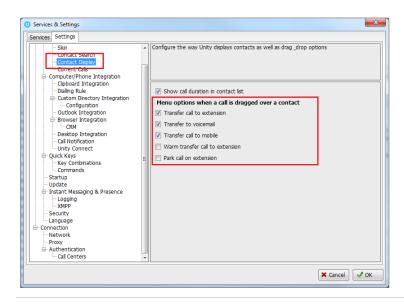
Many common call handling actions can be performed with drag and drop, as well as right click and call control buttons.

9.1 Make a Call to a User or Number

Drag a user icon ² or a speed dial shortcut icon ² from the Contacts panel up into the Active Call Window to make a new call to the selected user or number.

9.2 Transferring a Call to a User

Drag a live call onto a user to either perform blind transfer, or to populate a drop list with call handling options. The drag and drop behaviour for this action is configured in Settings as shown below.



9.3 Make a Call to a Call Center Queue

When the supervisor is configured as an agent, drag a call center queue from the Personal Wallboard to the Active Call Window to make a call to that call center.

9.4 Transferring a Call to a Call Center Queue

If supervisor is configured as an agent, you can drag a current call in the Active Call Window up and drop it on a Call Center in the Personal Wallboard. This will blind transfer the call to the call center.

9.5 Send to Voicemail

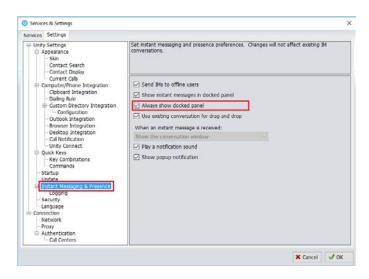
Dragging an unanswered call from the Active Call Window onto the Voicemail button will blind transfer the incoming call to your voicemail.

9.6 Call Control

Dragging a call over the Hold/Retrieve, Answer/Release, Transfer or park buttons will perform that action on the selected call.

9.7 Send New Instant Message

Drag a user to the docked IM window to the right of the Contacts panel to send an IM to that user. This requires that the "Always show docked panel" field is ticked in Settings > Instant Messaging and Presence.

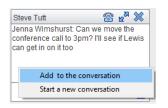




See also section 11 on Instant Messaging.

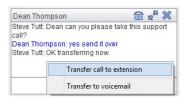
9.7.1 Add Participant to Existing IM Session

Drag a user icon onto an existing IM and choose "Add to the conversation"

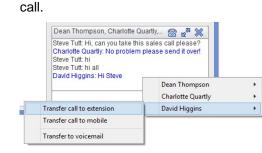


9.7.2 Transfer Call to IM Participant

Drag a call from the Active Call Window onto an IM session in the Docked IM Window and you will see a prompt to transfer the call. This is particularly useful if you want to check the recipient's availability before you transfer.



When dropping a call onto a multi-party IM session you will be prompted where to transfer the



10 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.

10.1 Contact Panel Display Options

There are four 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

10.1.1 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].

Contacts Call Loga Vo	icemail Abandoned Calls				My status: available in offic
Search	Q				
lame	Phone	Extension	Department	ACD State	Status
Abin Jose		8311			I am in a meeting from 18 November 14:09 unt.
Abin Joseph		8335		Sign-Out	I am out to lunch from 20 May 12:25 until furthe
Alastair Brown	02082881258	1268	Helpdesk	Unavailable - Technic.	Talking to Jon Lamont - 03:15
Alistair Todd	01173700075	0075		Unavailable - Clearin	
Andrew Smith		0002		Sign-Out	
Andrew Todd	01444220203	0203	Helpdesk	Unavailable - Clearin	
Barry Simpson	02035518327	0003		Available	
Charlotte Quartly					
Chris Milford	02082881254	1264			
Chris O'Nell		3833			
Cindy Baker	02082881239	1230			
Colin Farrant	02082881246	1246	Helpdesk	Sign-In	Talking to Colin Farrant - 30.36
Dave Dadds	02082881231	1231		Sign-Out	
Dave Upjohn	01444220202	0202			
David Hippins	02082881237	1237	Helpdesk	Available	Currently busy
Dean Thompson	02082881240	1240	Technical	Sign-In	Safe
Ebin James		8338		Acailable	
Ed Thrussell	02082881247	1247	Technical	Sign-In	
a lain Sinnet	02082881267	1207	Sales Team	Sign-Out	
John Dunbar	01444220201	0201			

With this view the sort order for each column can be set, which is saved when Unity is closed. You can also configure Unity to display or hide the extension, department, ACD state and call duration columns.



10.1.2 List View

This option will display all users in a list.

Contacts	Call Logs	Voicemail	Abandoned Calls	
Search			٩	
Alistair Andrew Andrew Barry Si Charlott	seph Brown Todd Smith Todd Todd Ungson te Qua Ungson Smith	Sally Jones	ant a /	

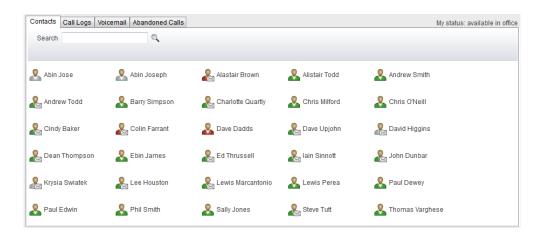
10.1.3 Small Icon View

This view combines a simplified look and space reduction.

Contacts	Call Logs	Voicemail	Abandoned Calls			My status: available in offic
Search			Q			
Abin Jos	se			🞗 Abin Joseph	& Alastair Brown	
& Alistair 1	Todd			& Andrew Smith	🐣 Andrew Todd	
🐣 Barry Si	mpson			🛃 Charlotte Quartly	🐣 Chris Milford	
🚨 Chris O	'Neill			🛃 Cindy Baker	& Colin Farrant	
Save Da	adds			💁 Dave Upjohn	🔏 David Higgins	
👃 Dean Ti	hompson			& Ebin James	🚨 Ed Thrussell	
💄 lain Sin	nott			🛃 John Dunbar	🐣 Krysia Swiatek	
🐣 Lee Hoi	uston			🛃 Lewis Marcantonio	🐣 Lewis Perea	
🐣 Paul De	ewey			鬼 Paul Edwin	🐣 Phil Smith	
🚨 Sally Jo	nes			A Steve Tutt	🧟 Thomas Varghese	

10.1.4 Tile View

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



In both the Icon and Tile views, hovering the mouse over the image will provide more information about the monitored user, for example their service configuration:



10.2 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

10.2.1 User Icon Engaged Tool Tip

Hovering your mouse over an engaged or DND icon will reveal more information about their current state, if available. For engaged users this will include the name or number of the party they are engaged to and the duration off the current call as below [this feature can be disable for privacy reasons].



10.2.2 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, as per the following examples.

	Ringing. Unity open and available for IM
2	DND/Unavailable profile. Unity open and available for IM

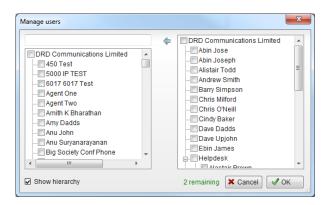
Ł	Engaged. Unity open and available for IM
&	Available/on-hook. Unity open and available for IM

10.3 Managing Monitored Users in the Contacts Panel

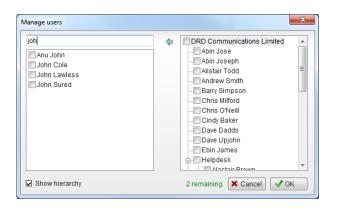
The Contacts panel will display 30 users. In the Contacts panel right click anywhere and click "Manage user list". This will allow you to choose which users to display.

Personal directory	•
Manage user list	
Appearance	•

You will then be able to move users or departments between the lists either by double-clicking them or using the arrow button. All users in the right-side list will be monitored in the Contacts panel. This list is saved when Unity is closed.



The box at top left will dynamically search the group directory.



10.5 Performing Call Control Actions in the Contacts Panel

There are many call control functions that can be performed by right-clicking a monitored user in the main Contacts panel or Search. The menu options displayed will dynamically change to only show those available depending on the state of the monitored user and/or the state of the selected call in the Active Call Window [if there is one]. For example, "Transfer to voicemail" will not be available if the user does not have the voicemail service assigned and "Camp call on extension" will not be available unless there is a live call selected in the Active Call Window.

Call extension
Camp call on extension
Warm transfer call to extension
Park call on extension
Call mobile
Transfer call to mobile
Warm transfer call to mobile
Transfer to voicemail
Barge into this call
Call extension when available
View user details
Instant message
Remove XMPP presence
Send email
Personal directory
Manage user list
Appearance +

10.5.1 Call Extension

Selecting "Call extension" will open a new call to that user in the same way that double clicking the user icon would. Any current call will automatically be placed on hold. This can be used to make an announced transfer as opposed to a blind transfer using the "Transfer call" commands further down the menu.

10.5.2 Answer This Call [Call Pick-Up]

This will perform call pick-up and will pull the call to the ringing Supervisor user.

Feature Dependency:

- I. Monitored user must be ringing [orange icon]
- II. Supervisor and monitored users must be in the same pick-up group

10.5.3 Park Call on Extension

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

Feature Dependency

I. Must have a live call

10.5.3.1 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.



10.5.4 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. If the user does not go back on-hook before the camp timer expires the call will return to the Supervisor user.

Feature Dependency

- I. Must have a live call in the Active Call Window
- II. Must be enabled in Settings > Call Transfer as below

The Camp Call option will only be available if activated in Settings > Call Control > Call Transfer as below.

Services Settings	
Incomng Calls Anormous Call Rejection Anormous Call Rejection Call Convert Sharps Call Convert Biology Call Convert Biology Call Convert Calle Line ID Delvery Calle Convert Calle Convert Calle Convert Calle Convert Calle Convert Call Recording Call	Configure call transfer recall and busy camp on features. Busy camp on allows you to hold ; Call against another person's [busy] extension until they are available. Image: Allow call transfer recall Number of rings before recall S Image: Allow busy camp on Camp calls for (seconds) Image: Use diversion inhibitor for blind transfer Image: Use diversion inhibitor for consultative calls Image: Allow warm transfer through Unity

10.5.6 Call Mobile

Places call to mobile. Any live call placed on hold.

Feature Dependency:

The monitored user must have their mobile number entered in BWKS

10.5.7 Transfer Call to Mobile

Performs blind transfer call to monitored users mobile.

Feature Dependency:

- I. The destination user must have their mobile number entered in BWKS
- II. Must have a live call

10.5.8 Transfer Call to VoiceMail

Performs blind transfer to the destination user's voicemail.

Feature Dependency:

- I. The destination user must have voicemail service assigned
- II. Must have a live call

10.5.10 Barge into This Call

Makes an immediate three-way conference call with the Supervisor user, the monitored user and the third party the monitored user is talking to. All parties will be able to talk and hear each other. When attempting to barge into a call, if the phone plays a "number doesn't exist" tone then this

means the monitored user cannot be barged into, because they have the Barge-In Exempt service assigned and activated. Only users without this service active can be barged into.

The Active Call Window will display like a normal conference call, as below, and the Supervisor user can Hold/Retrieve the same as for a conference call.

TO	Duration	Status	
Andrew Smith	00:13	Active (conference)/Not recording	
Barry Simpson	00.07	Active (conference)/Not recording	
		Andrew Smith 00:13	Andrew Smith 00:13 Active (conference)Not recording

Please note that when leaving a call that you barged into, you must transfer the call parties together in order to leave the conference without ending the original call. To do this either drag

one call on top of the other in the Active Call List, or press Transfer she then select the option to leave the conference, as shown below.



Feature Dependency:

- I. The Supervisor user must have directed call pick-up with barge-in service assigned
- II. Monitored user must be engaged on a call
- III. The monitored user must not have the barge in Exempt service active

10.5.10 Call Extension When Available

Places an alert on the engaged monitored user. When they become free a dialogue box prompts the Supervisor user and allows them to open the call back.

Unity	×
Harry Dadds is now available, would you like to call this extension? If you click 'no' you will not be prompted to call again.	
<u>Y</u> es <u>N</u> o	

Feature Dependency:

I. Monitored user must be engaged on a call

10.5.11 View User Details

Performs a lookup on the user's details as entered in BWKS. This includes their phone number, mobile and email address.

David Higgins	X
Title:	
Email:	d.hiqqins35362@outlook.com
Phone:	02082881237
Mobile:	
WAV File:	
	√ ок

10.5.11.1 Adding Audio Alerts to Monitored Users

The "View user details" box also allows a wav file to be specified that will be played when the monitored user receives a call. Click the 🗔 icon to select the wav file then click OK. This feature is useful in Manager/Secretary scenarios where the Supervisor user is screening calls. When the audio alert plays that is the reminder for the user to perform call pick-up.

10.5.12 Send Email

This will open a new email window in the default Email application. The user must have the email filed populated against their name in BWKS.

Feature Dependency:

I. The recipient user must have their email address entered in the system

10.5.13 Answer This Call [Call Pick-Up]

When monitored users are ringing their icon in Contacts becomes orange $\overset{k}{\sim}$. To perform pickup and answer the call right click the icon and select "Answer this call". This option is only displayed when right clicking a ringing user.

2	Charlotte Quartly 💦 🔍	Chris Tutt
_	Transfer to voicemail	
ſ	Answer this call	
1	View user details	_
	Edit note	
	Remove note	
	Instant message	
	Out of office assistant	•
	Service Configuration	•
	Personal directory	•
	Manage user list	
	Appearance	•

Feature Dependency:

I. The Supervisor user and the monitored user must be the same pickup group or the Supervisor user must have the "Directed Call Pick-Up" service assigned.

11 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.

11.1 Online/Offline Indicator

A person that is running an instance of Unity, and therefore available to send an online IM to is indicated with a small envelope on their user icon. This applies across all the available, engaged, ringing and DND states as shown below.

State	Online [Unity Open]	Offline [Unity Closed]
Available		&
Ringing	2	&
Engaged	-	&
DND/unavailable profile	æ	<u>&</u>

11.2 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.

Docked IM Window	
Charlotte Quartly 😰 👷 💥 Steve Tutt: Hi, how are you? Charlotte Quartly: Great thanks, how are you?	
	-

Docking the IM window is specified in Settings > Settings > Instant Messaging and Presence > "Show instant messages in docked panel". Individual IM messages can still be undocked and redocked as required.

es Settings	
ese Settings Appearance Contact Search Contact Display Current Calis Computer/Phone Integration Clipboard Integration Clipboard Integration Dialing Rule Custom Directory Integration Outlook Integration Call Notification Unity Connect Quick Keys Key Combinations Commands Startup Update Integrat Ressong & Presence Clipboard Commands Call Notification Unity Connect Duity Connect Commands Commands Commands Call Notification Commands Call Notification Commands Commands Commands Call Notification Commands Co	 Set instant messaging and presence preferences. Changes will not affect existing IM conversations. Send IMs to offline users Show instant messages in docked panel Always show docked panel Use existing conversation for drag and drop When an instant message is received: Show the conversation window Play a notification sound Show popup notification Show popup notification until closed
Security	
Language	
onnection	
Network	
- Proxy - Authentication	
Call Centers	
Call Centers	×

11.3 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.

Docked IM



Click the ²⁴ "Dock conversation in main window" button to pull the IM session back into the docked panel in the main Supervisor interface.

Undocked IM

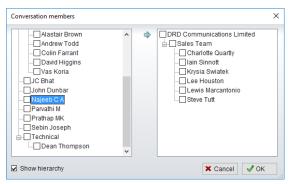
Conversation: Lewis Mar	ſ	-			\times
Jenna Wimshurst: Hey Lewi call for me please? Lewis Marcantonio: No prob		you	take '	this s	ales
Last message received at 10:50	212	*	8	e e	

11.4 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. Alternatively, you can select Messaging > Start Conversation from the top menu bar.



You can then select the users to include in the IM conversation. Please note that only online users will be displayed in the lists. The left list contains all online users, to include them in the IM conversation move them into the right list either by double-clicking the entry or using the arrow button.



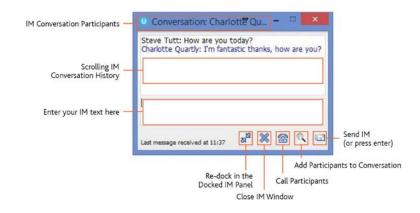
11.5 Overview of IM Window

The upper part of the IM window will scroll to display the most recent comment. Type your comment in the bottom window and press Enter or click the ^{III} envelope at bottom right.

IM Window - Docked



IM Window – Undocked



11.6 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. When the IM Window is undocked you click the Search icon and select participants to add to the conversation, as below.

Conversation members		×
Pranathi 18 Prathap MK Ralaad P R Sales Team Charlotte Quartily Vialin Sinnott Krysia Swiatek Lee Houston Seven Tutt Seven Tutt Seven Tutt Deeph	DRD Communications Limited	
Show hierarchy	🗙 Cancel 🛛 🖋 OK	

11.7 Sending Contact Directory Numbers

To send another user a number from your Directory right click in the bottom panel where you enter text. Mouse over to see your Directory entries and select the appropriate number.



Feature Dependency:

- II. The recipient user must have their email address entered in the system
- III. The Supervisor user must have their outlook client open and they must have full sharing Permissions to see the monitored user's Calendar in Outlook

11.8 IM Notification Settings

All notification options for IMs, including sound and popup notifications can be found in the

settings under Instant messaging & Presence.

rvices Settings	
 Appearance Settings Appearance Skin Contact Display Contact Display Contact Display Contact Display Contact Display Computer/None Integration Dialing Rule Oution Directory Integration Duttok Integration Outiok Integration Browser Integration Call Notification Dutk Rego Directory Integration Call Notification Dutk Rego Theoretication Call Notification Undry Connect Quark Responses Starup Update Dutant Mession & Presence Logong & Presence Logong Bassword Scurity 	Set instant messaging and presence preferences. Changes will not affect existing IM conversations. Send IMs to offline users Show instant messages in docked panel Aways show docked panel Use existing conversation for drag and drop When an instant message is received: Show the conversation window Play a notification sound Show popup notification until closed
- Connection	
- Network	
- Proxy - Authentication	
- Authentication	
···· Call Centers	×

Selecting the 'Show popup notification until closed' will keep the IM popup on the screen until it has been closed or clicked.

	Chris Tutt Please call Simon Steel on 020 8288 4470				88
^ 1	* 🗖	<i>(</i> {{}} 4))	FNG	14:06 10/11/2016	E.

11.9 Send IMs to Offline Users

Even when a user is offline, Unity will allow you to send them an instant message which will then be queued and will appear the next time the user is online.



11.9.1 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, for example, you may want to save IM conversations on your server rather than on the supervisor's local computer.

Services & Settings	×
Services Settings	Set instant messaging and presence logging preferences. Log files can be saved in a central location for security purposes.
Skin Contact Search Contact Display Current Cals Computer/Phone Integration Diploard Integration Diploard Integration	Log instant message conversations Create a new file for each conversation
Custom Directory Integration	Create a new file every day O Always use the same file
Browser Integration Desktop Integration Call Notification Unity Connect	Log file type HTML V Log Folder
Guick Keys Key Combinations Commands Startup Update	C:\Program Files (x86)\Unity Client\Instant Message Log\
Instant Messaoing & Presence Logging Security Language	
Connection Ornection Network Proxy Authentication Call Centers	
	X Cancel

11.11 XMPP Integration

Unity provides seamless integration with XMPP in order for Unity users to share instant messaging and presence (IM&P) functionality with UC-One clients. All instant messages are displayed and managed to the user as a docked or undocked IM conversation, regardless of the IM&P platform being used. Only online users in Unity can participate in group chats, group chat is not currently supported with XMPP.

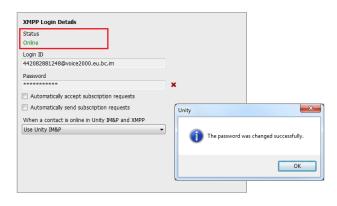
11.11.1 XMPP Authentication

Unity is unable to extract the XMPP password from the VoIP platform, meaning it must be reset from within Unity. This functionality relies on the Integrated IM&P service being assigned to the receptionist, although no other UC-One related service need be assigned.

In order to set the XMPP password go into Settings and click on the "XMPP > Change Password" item as shown below. You can see the current XMPP status is offline.

Services & Settings		🕐 Services & Settings	
Services Settings		Services Settings	
Ostrast Search Ostrast Search Ostrast Search Ostrast Deby Ostrast Deby Ostrast Deby Ostrast Deby Ostrast Phone Integration Obling Buil Ostrast Integration Ostrast Integratint Ostrast Integration	Configure XMPP details for Unity. The XMPP server will be assumed from the domain entered as part of the koph ID. XMMP Login Details Status Contine Login ID 442026918148490vock2000.eu.bc.tm Password Automatically accept subscription requests Automatically send subscription requests	Contact Search Contact Search Contact Newly Computer/Phone Integration Computer/Phone Integration Cological Status Constant Nessing & Presence Cological Source Source Source Cological Source Source Source Cological Source Cological Source Sourc	Ohings the bit-grated Message password. Please note that UCOne will need to be restarted after change the password in Unity. New password Confination
Proxy Authentication Call Centers		- Proxy - Authentication - Call Centers	
	X Cancel V OK	-	X Cancel V OK

Once the password has been entered you must click the OK button to save the password, before moving to any other panels in settings. Please note that the XMPP password <u>should not</u> be the same as the password used to first log into Unity. You will be notified once the password has been changed and the XMPP status changed to online, as shown below.



11.11.2 Managing XMPP Subscriptions

To subscribe to XMPP presence for a monitored user (meaning the receptionist will receive realtime updates as the monitored user changes their presence in UC-One) simply right-click the user and select "Add XMPP presence", as shown here. If already subscribed, then right-click the user to remove XMPP presence.



Unity will show the unavailable, busy etc status of the user, as well as any status message manually entered in UC-One, as illustrated below.

Contacts Call Logs			Away 🔻
Search james	Q	• N	/hat's on your mind?
lame		Phone	Status
Ebin James		8338	
Ebin James (Mobile)		989557477	
James - CBS		0777971580	_
James Smith		1312	Currently unavailable
Con Logo	୍		Away •
Search james	6		Away T
Search james	<u></u>		Away T
Search james		Phone	Away T

Please note that at present XMPP is only used by Unity to communicate with UC-One clients.

Unity can be configured to automatically subscribe to all monitored user's XMPP presence, as shown here. However, this may result in the buddy/contact list in UC-One becoming very large so should only be activated if the receptionist doesn't often refer to the buddy list.

Unity can also be configured to automatically accept subscription requests from other users, if this setting is not activated then whenever a user subscribes to the receptionists XMPP presence a prompt will be displayed, as below.

		1
XMPP Login Details		
Status		
Online		
Login ID		
442082881248@voice2000.eu.bc.im		
Password		
******	×	
Automatically accept subscription requests		
Automatically send subscription requests		[II.5
When a contact is online in Unity IM&P and XMPP		Unity
Use Unity IM&P	•	
		James Smith would like to share XMPP presence information with yo
		Would you like to allow this contact?
		Yes
XMPP Login Details		
Status		
Online		
Login ID		
442082881248@voice2000.eu.bc.im		
Password		
*****	×	
Automatically accept subscription requests		
Automatically send subscription requests		
When a contact is online in Unity IM&P and XMPP		
Use Unity IM&P	-	
Use Unity IM&P Use XMPP		
Use Both		
	—	

Unity can be configured to automatically generate an XMPP password the first time it is loaded, this is a branding property that is set in the Unity Client branding portal. In this case Unity will save the randomly generated password in Broadworks and also in the registry, from where it will be used whenever Unity is next started. When the password is reset in Broadworks it will automatically be updated in the device configuration file for UC-One, if in use. Furthermore, if UC-One is currently in use this will not impact the existing XMPP registration, therefore there is no impact on UC-One.

11.11.3 Instant Message Priority

Because a monitored user could be running Unity and UC-One, that user could be available to receive instant messages using either client, or both. In these situations, Unity can be configured to prioritise one IM platform over the other, as shown below.

Options are to only send the instant message using only Unity IM&P meaning the instant message will not be received by UC-One, to only send using XMPP meaning the monitored user's Unity client will not receive the message, or to send through both messaging protocols meaning both clients will receive any instant messages sent from Unity. The last option is the default and is recommended in most scenarios.

11.11.4 Configuration

Services & Settings		Services & Settings	
Services Settings		Services Settings	
Gana Search Contract Search Contract Dealey Contract Dealey Contract Dealey Contract Calls Transfer Hatery Contract Calls Control Dealer Dealer Dealer Control Dealer Dealer Control Dealer Cont	Set Instant messaging and presence preferences. Changes will not affect exating IM conversions. Send IMs to office users Send IMs to office users Send IMs to office users Mays show docked panel Mays show docked panel Use eaching conversion for drag and drop When an instant message is received: Show the conversion window Play and fulfation sound Shew popup notification	- Sea - Contact Depay - Transfer Hatary - Transfer Hatary - Transfer Hatary - Contact Depay - Contact Depay - Contact Depay - Configuration - Configuration - Configuration - Configuration - Shared Calendar - Binard Calendar - Binard Calendar - Unity Context - Unity Context - Unity Context - Unity Context - Startia - Unity Context - Startia - Unity Context - Unity - Unity - Unity	Set initiant messaging and presence logging preferences. Log files can be saved in a central location for security purposes. Coate a new file for each conversation Coate a n
Security Language Connection Network Proxy Authentication Cal Centers		- Security Language Connection - Network - Proxy - Authentication - Cal Centers	
	X Cancel	(here and the second se	X Cancel V OK

12 PERSONAL DIRECTORY

The Personal Directory is a repository on BroadWorks for each user to store personal speed dials. Using this feature in Unity will populate the directory on the host BroadWorks platform. Once numbers have been entered they are available in the Search panel or can be pinned to the main Contacts Panel. A Personal Directory entry is shown by a ⁽¹⁾ icon. Double clicking the icon will make a call to the Directory number. The Personal Directory menu is available when right clicking a monitored user or in the Contacts panel.

Personal Directory – Right click in Contacts

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

Personal Directory – Right click on monitored user

Call extension		
'iew user details		
Add note		
Instant message		
Send email		
Show calendar		
Service Configuration	•	
ersonal directory	•	Add new entry
Manage user list		Import directory
Appearance		Export directory

12.1 Add New Entry

Enter the Name and Number and click Ok

Add Personal Dir	ectory Entry X	
Name	Suzanne Lynch	
Phone	079569	
	🗶 Cancel 🛛 🖋 OK	

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



12.2 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".

Search russell	/oicemail Abandoned Calls		
Name		Ph	one
Russell Stevens	Call number	1	202652653
	Copy number		
	Personal directory	>	Edit Russell Stevens
	Manage user list		Remove Russell Stevens
	Appearance	>	Add new entry
			Import directory Export directory

12.3 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".

Search russell	۹.		
Name		Phon	e
Russell Stevens		0120	2652653
	Call number		
	Copy number		
	Personal directory	>	Edit Russell Stevens
	Manage user list		Remove Russell Stevens
	Appearance	>	Add new entry
			Import directory
			Export directory

12.4 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		۹.	
Name				Phone
😭 Russ	sell Stevens			0120265265
			Call number	
			Copy number	
			Personal directory	>
			Manage user list	
			Appearance	>

12.5 Import Personal Directory

Supervisor 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

12.6 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. The format is csv and the default file name is PersonalDirectory.csv

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

Choose save location on local PC. The format of the csv is Name and then Number. Note the example below is edited for privacy.

1	ILE HOME IN	SERT P	AGE LAYOUT	FORMUL	AS DATA	REV	EW.
	Cut Cut	Calibri	- 11	- A A	==	21-	8
	iste	в 1	u • 🖽 •	<u>A</u> - <u>A</u> -		42 HZ	E
	Clipboard r.		Font	r.		Alig	me
A	1 * 3 2	<	f_x Alex	0			
4		A		1	Б		C
1	Ale:]	26	0208	
2	All5				40	3004	
3	And				67	0809	
4	And				02	2005	
5	And				10	1333	
б	Ben				62	7966	
7	Cha				79	7620	
8	Chri				47	0000	
9	Clai				45	4476	
10	Dad				34	4175	

13 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 as well as integrating with CRM systems.

Please see your Administrator for a separate guide on using CRM integration.

Directory Owner	Directory Type	Entry Type
BroadWorks	Group Directory	All other users for BLF presence as well as hunt groups, auto attendants and call center queues
BroadWorks	Common Phone List	Speed dials entries at the Group level
BroadWorks	Personal Directory	The Supervisor users own personal speed dial entries
Outlook	Personal Contacts [private folder]	The Supervisor users own Outlook Contacts
Outlook	Group Contacts [public folder]	The shared Outlook Contacts at the Outlook group level
Third Party	SQL	External SQL Directory
Third Party	LDAP	External LDAP Directory

13.1 Loading Directories

Unity will load all directory entries into Contact Search on start. If users are added to the BroadWorks Group Directory while Unity is running, they will not be visible until Unity has restarted. Personal directory entries the user adds will be available to use immediately without restarting. The local outlook client must be running for Unity to import Outlook Contacts. If it is not, Unity will prompt Outlook to open in order to populate the Contacts into Search.

13.2 Contact Search Results Layout

To perform a search type characters or numbers in the Search field and Supervisor will start dynamically populating a list of matching entries across all directories. The list will narrow as more characters or numbers are entered. Clearing the Search box and returning to the main Contacts panel can be achieved by clicking again in the Search filed [provided "Clear the search box when activated" is enabled in Settings as outlined in the section below.

Con	tacts Call Logs Voice	email Abandoned Ca	lls			My status: available in offic
Se	earch col	Q				
Nam	ne	Phone	Extension	Department	ACD State	Status
8	Colin Farrant	02082881246	1246	Helpdesk	Sign-In	Talking to Colin Farrant - 57:09
8	Colin Farrant (Mobile)	07796948542		Helpdesk		
2	Colin Runham Mob	07860353035				
8	Collaborate - Audio		0346			
2	COLT	08707377733				
8	John Cole	01173700074	0074			
2	Lorna - Oakmere C	07903545755				
2	Malcolm - Turners	07749937091				

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.

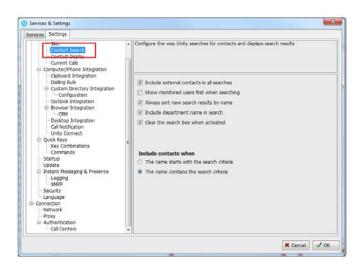
icons represent external numbers or system resources such as hunt groups for which presence information cannot be displayed.

ker icons represent other users in the group with their presence status. Red is engaged, green is available, orange is ringing and grey is on do not disturb.

It is also possible to search on department name to list all users of matching departments.

13.3 Contact Search Settings

Preferences for Search can be configured in Settings > Unity Settings > Contact Search. The order of search results can also be changed to display internal extension users first and the "Include department name in search" as shown above, can be toggled.



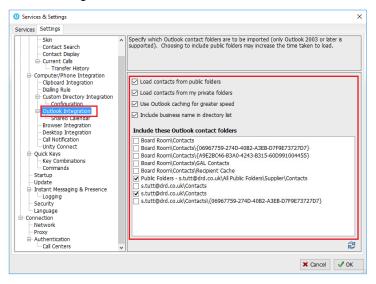
13.3.1 Listing Directories

Right-click the search box in the Contact list to view all directories available in Unity, then select the directory to load those contacts in the list, as below.

Contacts Call Logs	/oicemail Abandoned	Calls				My status: available in offic
Search	DRD Communica	tions Limited	•	Entire directory		
Name	Common phone	list		Helpdesk		Status
🙎 Abin Jose	Personal director	v				I am in a meeting from 18 November 14:09
🙎 Abin Joseph		0000	_	Sales Team		I am out to lunch from 20 May 12:25 until fur
Alastair Brown	02082881268	1268	Help	Technical		
& Alistair Todd	01173700075	0075		Sales South	- Cleari	
Andrew Smith		0002	_	Sign_Or	it.	

13.4 Configuring Outlook Contacts Preferences

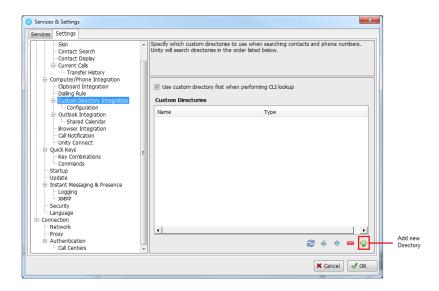
The Outlook directories are both public and private folders and is configurable in Settings > Outlook Integration as below.



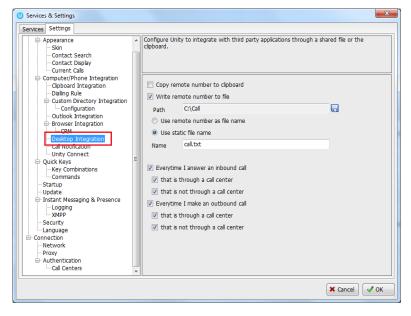
13.5 Third Party Directories

When searching BroadWorks and Outlook directories, Unity will dynamically match entries as keys are typed. For third party LDAP and SQL directories, because these are not loaded into Unity but polled each time a search request is made, search results are not listed until the Supervisor user has entered three characters and hit enter or clicked Search

Unity includes a wizard to connect to third party SQL and LDAP directories. Go to Settings to add, edit and remove custom directories, as shown below.



13.6 Desktop Integration



Go into Settings > Settings tab > Desktop Integration, as below.

Unity must be configured with the folder location where the file is to be written, you can also specify whether to use the remote number as the filename (for example 02082881248.txt) or to include the remote number in a text file with whatever naming convention you require. Lastly you should instruct Unity when to create the file, for example only when receiving [call center] calls. Please note that Unity will only create the file for an inbound call when the user has answered it.

When you click OK to save, Unity will attempt to create a file called test.txt in the specified folder, then to delete it, which is to test that appropriate folder permissions have been applied. If this fails, Unity will alert the user and the settings will not be saved.

14 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 Supervisor user in BroadWorks. Calls to the Supervisor user DID as well as hunt group and call center calls that have reached the Supervisor 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	0208(
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.

15 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. Unity will only display the options for the services that have been assigned to the user, available services are CommPilot Express (CPE), Do Not Disturb (DND), Call Forward Always (CFA), Remote Office and Hoteling Guest (for hot-desk environments).

Current Statu	IS			
My status: do no	ot disturb	Available: in office		
r notice.		Available: out of office Busy Unavailable None		Options depend on
	=	Do not disturb Call forward always	•	service assignment
		Connect to a device	•	
		Remote Office	•	

CommPilot profiles are also used to convey presence information to other users within the group or enterprise. As users change their CommPilot Express state, any Unity client that is monitoring that user [through the User Status list] will see their image change, as outlined below.

User State	Description	User Status Image
Available: In Office	I am in the office and available to receive calls.	&
Available: Out Of Office	I am not in the office but am available to receive calls	&
Busy	I am currently busy (short term)	2
Unavailable	I am currently unavailable (longer term)	2
None	No call routing plan is in use	2

15.1 Configuring CommPilot Express States

CommPilot Express allows the user to specify how inbound calls are to be handled. Once the four different profiles (above) have been configured in Settings, the profile in use can quickly be changed through the My Status link. Unity can also be configured to automatically apply a CommPilot Express profile when starting or closing, as below.

Services Settings	
blemag Gels Anonrmus Gill Rejection Anonrmus Gill Rejection Gal Forward Bury Gal Forward Bury Gal Forward No Answer Gal Forward No Answer Gal Cante Substance Gal Cante Gal Gal	Commonles Exprese alones you to pre-conduce frou portice to control your rebound calk. These portices and update through linkly when you kave your deak or are at a remote location When linkly starting set my portile to INRC Set • • • When Linkly closing set my portile to INRC Set • • • Mode Set • • • • • • Mode Set • • • • • • • Mode Set • • • • • • • Mode Set • • • • • • • • Budy dealers • • • • • • • • Budy dealers • • • • • • • • • • • • • • • • • • •

15.1.1 Available: In Office

This is the profile to use when you are working from the desk where you phone is located; it should represent "normal" routing rules.

Divert all calls to voicemail (if configured)	
2 But forward calls from these numbers	
37970663035	
to 37970663035	1.0
Notify me of new voicemails via email	

15.1.2 Available: Out Of Office

This is the profile to use when you are away from your desk for an extended period, but still available for receive calls. Examples are when in a meeting or when travelling.

Also ring	
if busy	
send call to voicemail	
forward call	
to	
If not answered	
send call to voicemail	
S forward call	
to	

15.1.3 Busy

This is the profile to use when you are temporarily unavailable to take calls, for example when in a meeting where you don't want to be disturbed.

When a call arrives:	
send call to voicemail	
C forward call	
Notify me of all calls via email	

15.1.4 Unavailable

Use this profile when you are away for an extended period of time and not available to take calls, for example when on vacation.

07970663035	
to	- e
07900575695	
When a call is sent to voicemail use "unavailable" greeting	
use "no answer" greeting	

15.2 Do Not Disturb

To activate Do Not Disturb, click on the My Status link and click the menu option. The My Status link will change to indicate the service activation, as will the Unity title bar.

Unity Agent: Jenna	Vimshurst ools Help)				00:10)						
available Available Wr	ap-up Rela	ase Dial	Transfer	Hold		Voicemail	Recording R		ettings			
		N	ly Statistic	s					II Queue S	tatistics		5
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	lotal Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Bolts Sales	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
Nuts Sales	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
VanillalP Support	0	0	0	00:00:00	00:00	6	6	0	0	00:00	00:11	05:06
	0	0	0	00:00:00	00:00	6	6	0	0	00:00	00:03	01:42
From		То				Duratio	n		Status			
Contacts Call Logs	Voicemail	Abandone	d Calls								My status:	do not disti
Search												

Anyone monitoring the user [in the Contacts list] will also see that they currently have Do Not Disturb activated.

Contacts Call Logs		
Search colin	<u> </u>	
Name	Phone	Status
🛃 Colin Farrant	0208288124	Do not disturb
Colin Farrant (Mobile)	077969485	
👚 Colin Runham Mob	078603530	

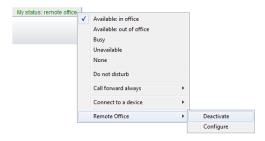
15.3 Call Forward Always

\checkmark	Available: in office		
	Available: out of office		
	Busy		
	Unavailable		
	None		
	Do not disturb		
	Call forward always	+	Deactivate
	Connect to a device	•	Configure
	Remote Office		

Use the My Status link to quickly activate/deactivate the service, or click configure to go directly to that. service in Settings

15.4 Remote Office

Use the My Status link to quickly activate/deactivate the service, or click configure to go directly to that service in Settings.

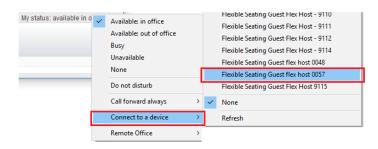


Unity can also be configured to automatically activate and deactivate Remote Office on start-up and shutdown. If Unity is not configured to automatically deactivate when closing a prompt will be presented to the user, as shown below.

Services & Settings	
Services Settings	
Cal Center Agent ACD State Statistics Columns Reporting	Use your home, mobile or any other other phone as your business phone and control it through Unity.
Comm Plot Express Available: In Office Available: Out Of Office Busy Unavailable	Enabled Phone number 079005756
Ob Not Datum Ob Not Datum Determin Cling Line ID Delivery Internal Caling Line ID Delivery Simulanceus Ring Outgoing Cali Caling Line ID Delivery Biocling Gal Control Proadwords Anywhere Proadwords Anywhere Old Tranfer	Automatically activate when starting Automatically deactivate when closing Unity Remote office is currently active, would you like to deactivate this service?
- Call Park Retrieve - Call Recording - Call Waiting - Directed Call Pickup With Barge-in - With Barge-in	Yes No
Hoteing Guest Genetic Office - Shared Cal Appearance Messaging - Voicemail	

15.5 Hot-Desk and Flexible seating

Hoteling Guest allows the user to connect to a device, typically in a hot-desk and flexible seating environment. To attach the user account to a device, select the device from the menu option below. Please note that only available devices [that aren't already in use] will be displayed.



There is no visual notification that the user account is attached to a device, other than if the user clicks in the My Status link, in which case they will see the device is ticked.

	available in office	Available: in office Available: out of office	
lain Sinnott		Busy Unavailable None	
		Do not disturb	
		Call forward always	,
Hot Desk 3 - 9103		Connect to a device	•
Alastair Brown Charlotte Quartly		Remote Office	,

When Unity is closing, it will prompt the user to remove the device attachment.



If the user clicks no they will continue to be attached to the device until the association is automatically ceased by the Broadsoft.