

## Initial Access

The first time Unity is started you will be prompted to login.  
 Contact the service provider to receive your credentials, or for assistance with BroadWorks server connection details, as needed.

1. Enter the Login ID and Password credentials you received from the Service Provider. (see fig. 1)
2. Click to place checks in the boxes to Remember Login ID and Password for future access, as desired.
3. Click OK/Save to submit setting changes and choose Yes to restart the application and begin using Unity.  
 Future logins will use the settings defined here for access.

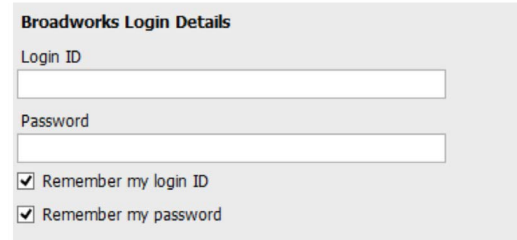


Fig. 1

## The Interface

- » Unity displays three main functional areas: Call Controls, Active Calls, and Busy Lamp Field where Contact directories, Call Logs and Voicemail may be reviewed. The Personal Wallboard and Instant Messaging (where enabled) are also provided to authorized users.
- » The Active Call List displays the status of all current calls for the user, which are managed using the Call Control buttons.
- » The Call Control buttons change dynamically based on current state of the call to provide appropriate actions.
- » When Unity first starts it automatically populates the Busy Lamp Field section with 8 or 30 random users in your group or enterprise [depending on Unity license assignment].

**Answer/Release**      **Call Control**

**Personal Wallboard**

Name	Total Calls	Web Chats Answered	Answered Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answered	Web Chats Received	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Calls Abandoned	Web Chats Queued	Web Chats Answered
Kakapo Systems	0	0	0	00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	1
Bulls Sales	0	0	0	00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	0
Nuts Sales	0	0	0	00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	1

**Active Call Window**

Activity	From	To	Duration	Status
Call	Natalie Malines (Salesforce Contact)	Jenna Wimshurst	00:14	Active/Not recording









**User Presence and Status**

Name	Phone	ACD State	Status
Abin Joseph	8335	Sign-In	I am out to lunch from 17 September 23:2 until further notice.
Alastair	020828812	Available	Talking to James Turner (Customer Support) - 00:10
Amy East	020828812	Sign-Out	
Charlotte Thompson	020828812	Sign-Out	
Chris Tull	020828812	Sign-Out	
Cindy Brown	020828812		
Colin Houston	020828812	Sign-Out	
Dave Swiatek	020828812	Unavailable - Paperwork	Do not disturb / In a meeting
David Hig	020828812	Sign-In	
Dean	020828812	Sign-In	
Ed Thruss	020828812	Sign-In	Currently away
Gopikrishnan V	8332	Available	
Iain Sin	020828812	Sign-Out	In a meeting
Krista Brown	020828812	Available	
Lyle House	020828812	Sign-In	
Lewis Mancan	020828812	Unavailable - Training	
Paul Dewey	020828812	Unavailable - Comfort Break	

**Docked IM Window**

Steve Wardle  
 Jenna Wimshurst: Hey can I transfer this sales call to you please?  
 Steve Wardle: sure

## Call Controls

Icon	Function	Description
	Dial	Click this icon to dial a number and make a call. Right-click it to redial from the last 10 numbers called.
	Answer	This button displays when a call is ringing.
	Release/End call	This button displays when in an active call. Click to end the call. If you have multiple calls, click on the call you want to end first.
	Hold	This button displays during an active call. Click to hold the call. If you have multiple calls, click the call you want to put on hold first.
	Retrieve	This button is available when a call is On Hold. Click the button to take the caller off hold.
	Voicemail	Click the Voicemail button to send an incoming call to voicemail. Click the Voicemail button when idle (no active calls) to dial your voicemail box.
	Transfer	Click the Transfer button to transfer a current call to a specified number. Drag and drop the call over a contact to transfer to them without entering their number.
	Conference	Select two or more calls then click the Conference button to start a conference with those callers.

### TRANSFER A CALL

- » **Announced Transfer:** Answer an inbound call then make a new call to the desired number, this will place the first caller on hold and initiate a new call. Once the new party answers, click transfer and transfer the two calls together.
- » **Blind Transfer:** While on an active call, dial a number or drag to/right-click the recipient, then select Transfer, this will send the caller directly to the destination number and disappear from your call list.
- » **Warm Transfer:** Right-click the user you want to transfer the call to and select "Warm transfer". This will then put the original caller on hold while you talk to the other user, when ready, click the transfer button.  
(You can also transfer a call to someone's voicemail or mobile by right-clicking their icon and selecting the option.)

### START A CONFERENCE CALL

1. Establish the first call.
  2. Click Dial and select or call a second person.
  3. Click the Conference button to merge the calls and start a new conference for all three of you.
- » To add more people to the conference simply click Dial and start another call, then click the Conference button.

### END A CONFERENCE CALL

- » To end the conference call but continue speaking to one of the callers, simply select the person/call you want to end and click the Release button.
- » To end the conference call and disconnect all parties, hang up the phone or select both calls and click Release.
- » To leave the conference but allow the other callers to continue speaking to each other, perform an Announced Transfer between the two calls.

## MANAGE MULTIPLE CALLS

» To manage a specific call, first select it by clicking it in the Active Call Window. 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.

## BUSY LAMP FIELD

### USER STATUS VIEWS

- » Monitor up to 30 users in a view, depending on Unity license assignment.
- » Panel tabs allow users to view/search Contacts, Call Logs, Voicemail, Abandoned Calls, Agent Activity, etc.
- » Right-click anywhere in the list to change the view of the users, the list, icons, etc.
- » To modify the list of users currently being monitored, right-click in Contacts and select Manage User List. Highlight and move the users you want to add to the list on the right using the → arrow. (see fig. 2).

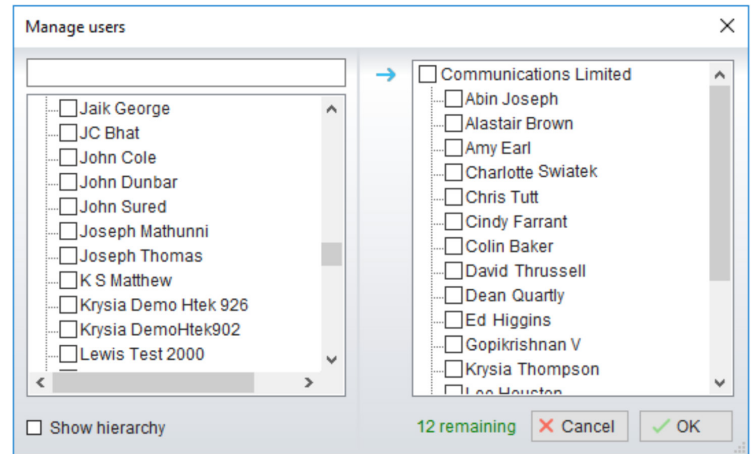


Fig. 2

## MONITORED USER STATES

Monitored users always display their current availability status:

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 take calls	
Busy	I am currently busy (short term)	
Unavailable	I am currently unavailable (longer term)	
None	No call routing plan is in use	

## DRAG AND DROP CALLS AND IM

- » Hold down and drag a user’s icon to the docked IM panel to start instant messaging.
- » Drag a user to the Active Call Window to call them.
- » Drag an active call to another user to transfer/show available transfer options.

## CALL PICKUP

This feature allows the user to answer an incoming call on behalf of a monitored user. Simply right-click on a ringing user and select Answer this call (see fig. 3).

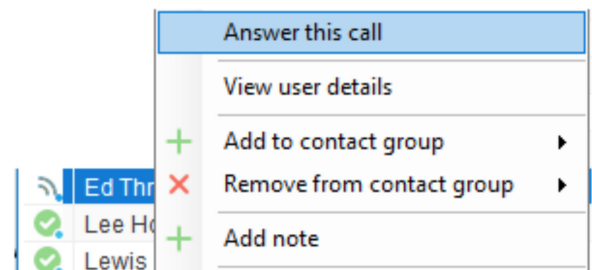
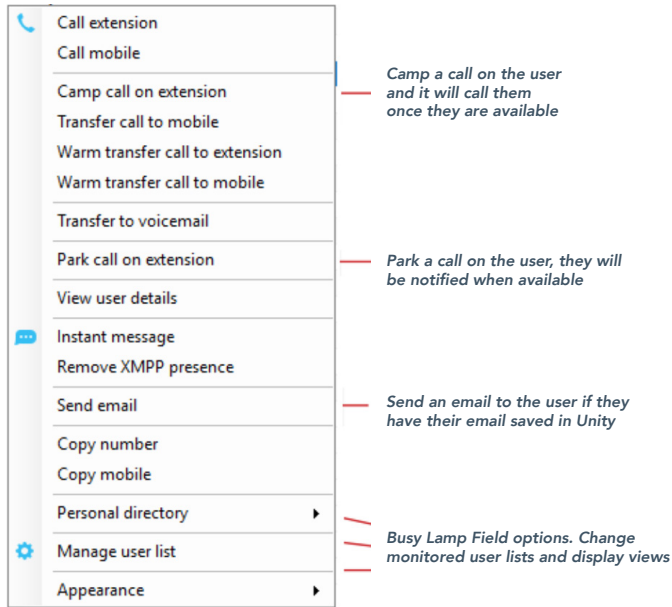
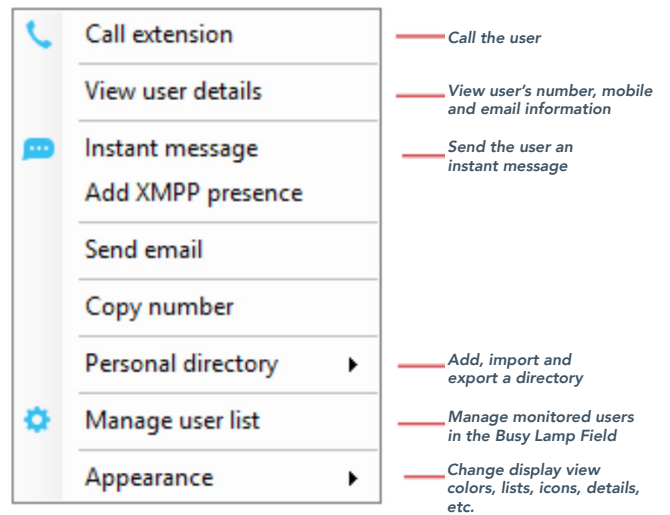


Fig. 3

### ACTION OPTIONS FOR A BUSY USER



### ACTION OPTIONS FOR AN AVAILABLE USER



## INSTANT MESSAGING

A small blue dot ● next to a user's icon indicates they are available for instant messaging. To send an instant message, you may:

- » Right-click the user icon and select Instant Message.
- » Drag and drop the contact's icon to the docked IM panel on the right (this can be defined in Settings).
- » Click Messaging at the top of Unity and select Start Conversation. Then add the people you want to instant message (see fig. 4).
- » Multiple online people can be selected to start an IM conversation by holding down the CTRL key while selecting the contacts you wish to include.

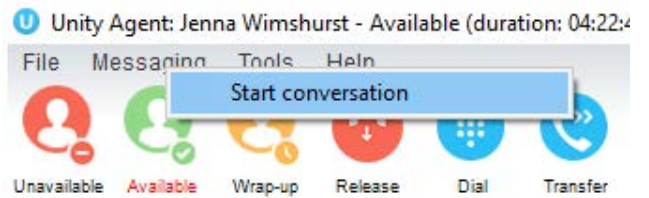


Fig. 4

## MY STATUS

- » To set your status to Available, Busy, Do Not Disturb, etc., click on the My Status link in the Busy Lamp Field pane and choose a status option. (see fig. 5)
- » To activate Call Forwarding, click on My Status, select the option "Call forward always", then enter the number. All incoming calls are sent to the pre-defined phone number, meaning the user's phone will not ring.
- » To activate and deactivate Call Forwarding, hover over "Call forward always" and select the desired option.

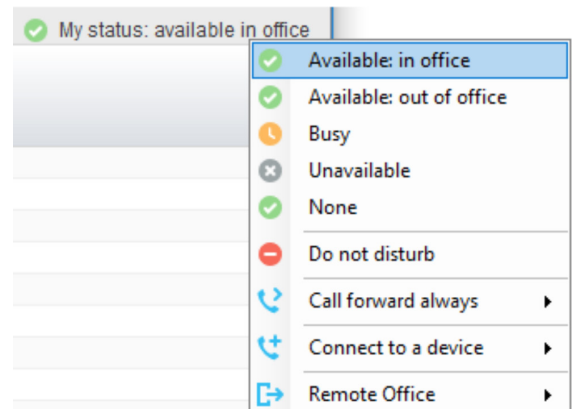


Fig. 5

# SUPERVISOR FUNCTIONALITY

## ASSIGN ABANDONED CALLS TO AGENTS

1. Open the Abandoned Calls tab in the Busy Lamp Field panel.
2. Right-click [or Shift + right-click for multiple] on abandoned calls and assign to an agent (see fig. 6).

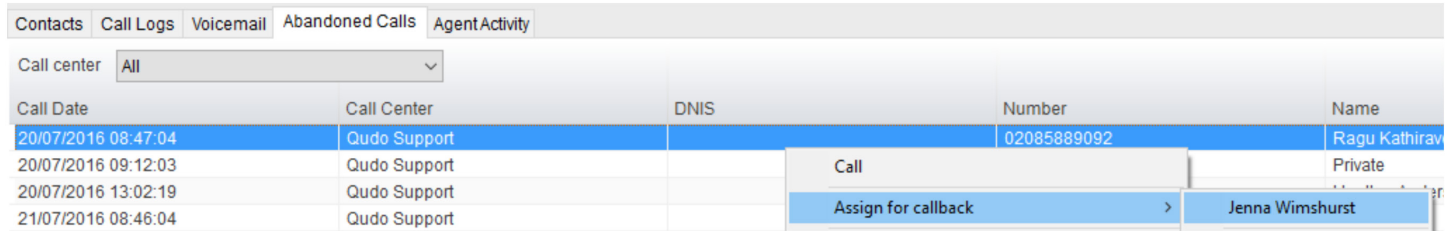


Fig. 6

Note: This capability requires Unity Supervisor Enterprise, Unity Wallboard and Unity Agent Enterprise.

## REMOTELY CHANGE AGENT STATE

- » Right-click on the user’s icon in the Agent Activity tab and select the Agent’s availability to the call center and/or their ACD state.

## CONFIGURE CALL CENTER STATISTICS IN PERSONAL WALLBOARD

- » Click Settings [button] > Services [tab] > Statistics > Columns > Call Center Columns – double-click the Statistics (E.g.; total calls) to set thresholds (see fig. 7).
- » Different thresholds can be set for all queue parameters, for different call centers, or all call centers can have the same threshold (see fig. 8).

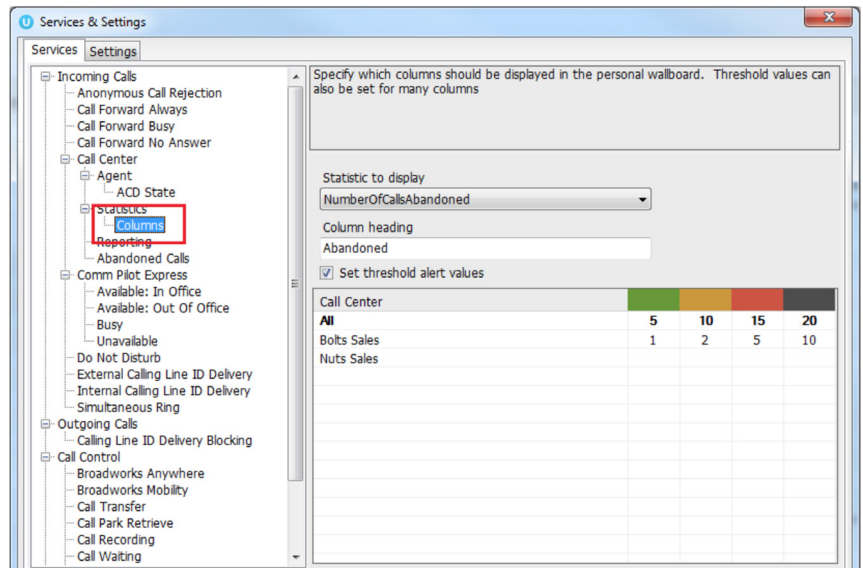


Fig. 7

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

Fig. 8

## CONFIGURE AGENT STATISTICS IN PERSONAL WALLBOARD

- » Configure the statistics shown in the Personal Wallboard by going to Settings > Services > Call Center > Statistics > Columns (see fig. 9).
- » Statistics can be added or removed using the **-** **+** buttons and the order they are displayed can be modified using the **↓** **↑** arrows.

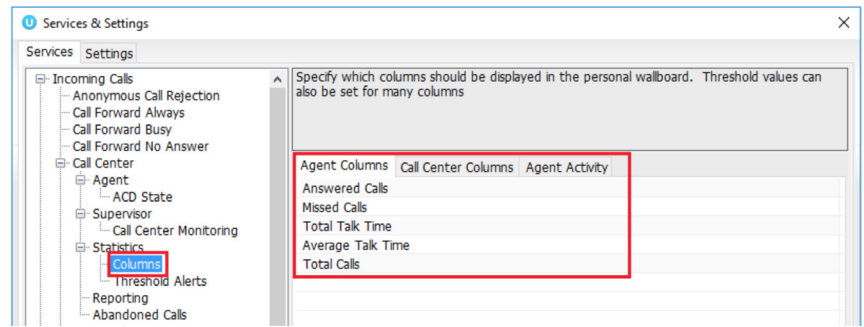


Fig. 9

## SILENT MONITORING

- » Right-click the appropriate call center queue in Personal Wallboard and click Agents > choose an agent from the list > Silent monitor and then pick "Next Call Only" or "All Calls" (see fig. 10).

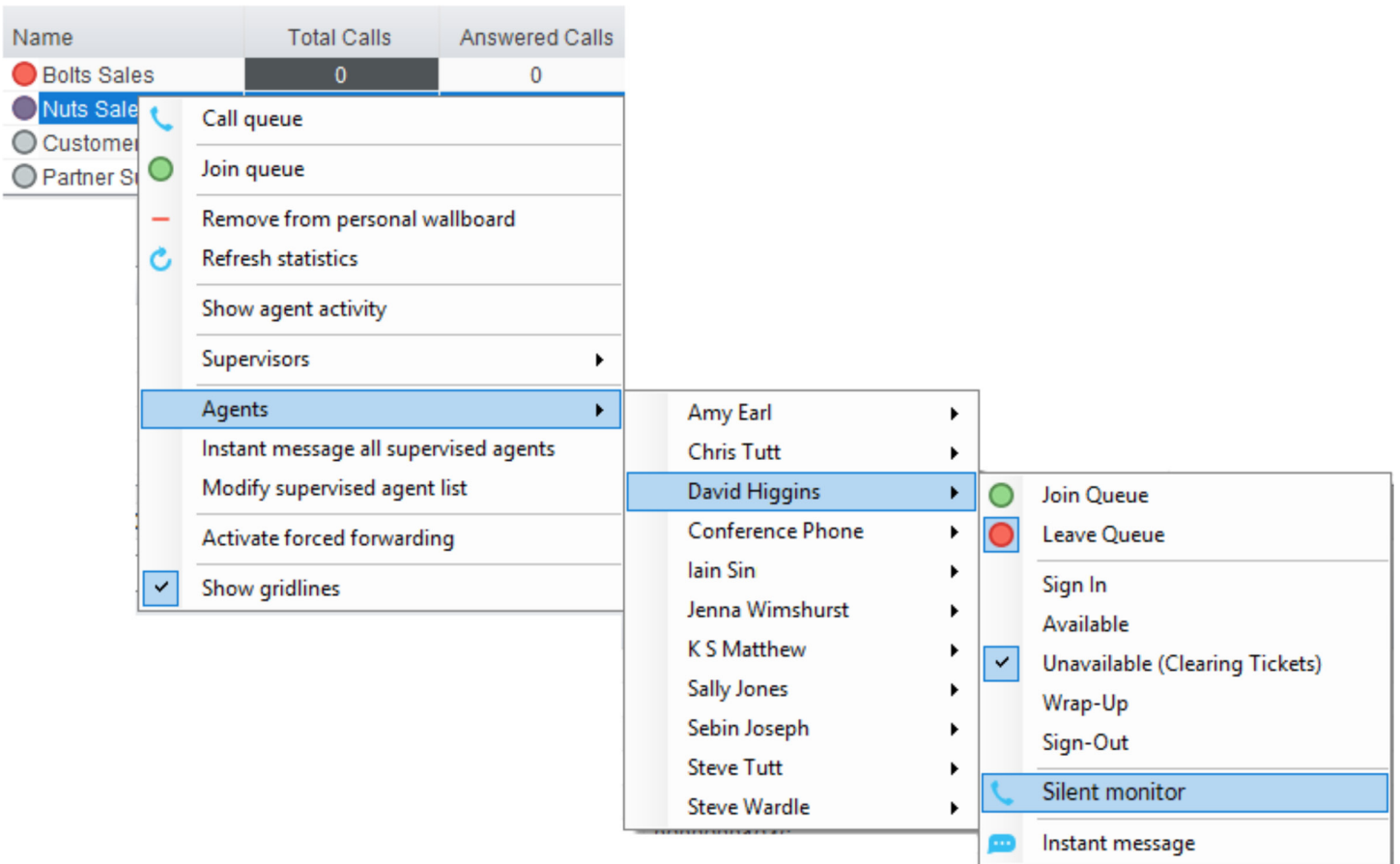


Fig. 10

## DEFINE A SUPERVISED AGENTS LIST

» To monitor a specific subset of the total agents assigned to you, go to Settings [button] > Settings [tab] > Supervisor and un-check “Automatically add all agents to my supervised agent list”. (see fig. 11).

» Click Save and Yes to restart Unity.

» Then right-click the appropriate call center queue in Personal Wallboard, select “Modify supervised agent list” and add the agents you want to monitor (see fig. 12).

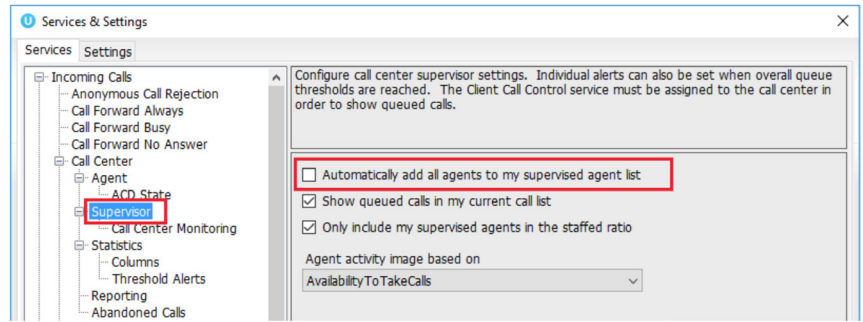


Fig. 11

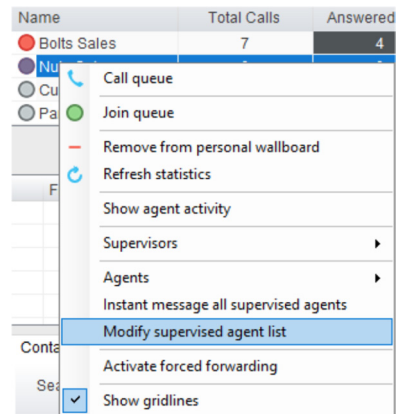


Fig. 12