



UNITY SUPERVISOR

User Guide

MOMENTUM
T E L E C O M

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1. WELCOME

Thank you for being part of the Momentum Telecom family!

We are thrilled to have your business and we look forward to working together.

We also want to welcome you to Unity - a hosted, unified Omni-channel contact center solution. The Momentum Team is constantly developing ways to improve your experience and offer new communications management tools that increase your productivity and make it easy to do what you do. At Momentum, we understand the critical nature of communications services to businesses and to *people*, and we take our responsibility seriously. It is our mission to make certain that you have the ultimate in state-of-the-art communications, unparalleled network reliability, and a consistently superior customer experience to ensure that you and your company are in a position to *thrive*.

Thank you for letting us help you communicate!

Sincerely,

The Entire Momentum Telecom Team

INTRODUCTION

This guide is a convenient, go-to resource for Supervisors getting started with the Unity Supervisor Dashboard application. It provides an overview of the interface, and offers general instructions and tips for working with the features. It must be noted that Unity setup is completed by the Service Provider. Some features described here may not be included in your subscription or offered to all users by your enterprise or your Administrator. Contact your organization's Unity Administrator to determine the features and services that are setup for use within your system.

We encourage you to take some time to review this document and keep it handy for future reference. Should you need further assistance, please reach out to us. We are always here to help you with fast, courteous, professional support, and we offer additional training upon request. Momentum Telecom is committed to doing everything possible to deliver an exceptional experience to help you and your business every day.

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.

STANDARD VS ENTERPRISE FEATURES

Unity Supervisor is offered in Standard and Enterprise levels. The features available in each include:

UNITY SUPERVISOR

Full call control, directory integration, and service configuration, and:

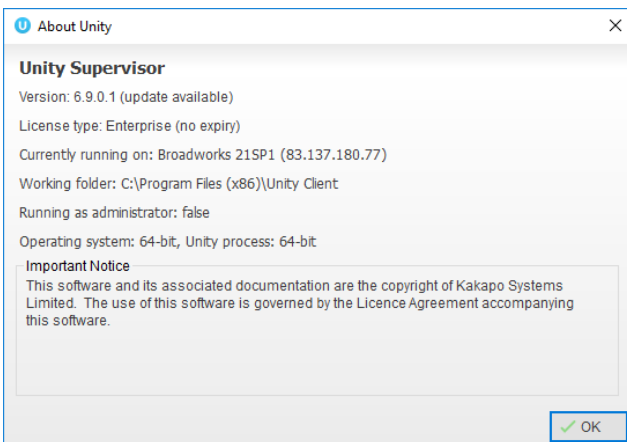
- ❖ Remotely change Supervisor and Agent ACD state [available, unavailable, wrap-up]
- ❖ Allows the Supervisor to set threshold alerts against real time statistics for Agents and Call Centers

UNITY SUPERVISOR ENTERPRISE

All Unity Supervisor Standard features, PLUS:

- ❖ 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.

Your current version can be found in [Help > About Unity](#)



SYSTEM REQUIREMENTS

WINDOWS PC REQUIREMENTS

- ❖ Unity will require approximately 20MB of hard drive space on the local machine
- ❖ By default the install directory is C:\Program Files (x86)\Unity Client
- ❖ 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
- ❖ Unity can be rolled out as an MSI file, which supports Active Directory group profiles
- ❖ Unity is only supported on Windows 7, Windows 8.1 and Windows 10
- ❖ Both 32 and 64-bit versions of Windows are supported.
- ❖ There are no special permissions required to install Unity

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:
- ❖ TCP port 2208 to im.unityclient.com
- ❖ TCP port 2208 to the VoIP platform OCI server
- ❖ HTTP/HTTPS access to portal.unityclient.com
- ❖ HTTP/HTTPS access to the VoIP platform XSI server [if call recording, visual voicemail or enhanced Call Center reports are used]

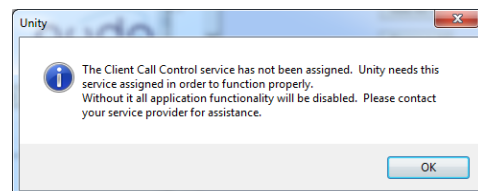
BROADWORKS PLATFORM REQUIREMENTS

- ❖ Unity Supervisor is supported on BWKS R17 SP4 and above

BROADWORKS LICENSE AND SERVICE REQUIREMENTS

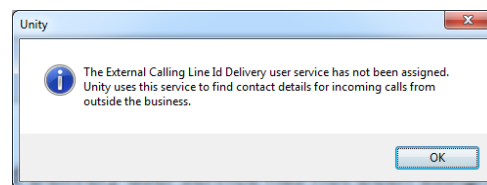
Client Call Control

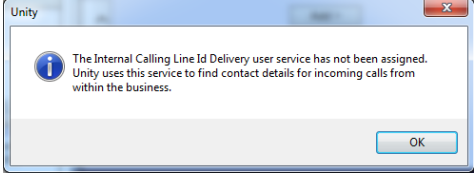
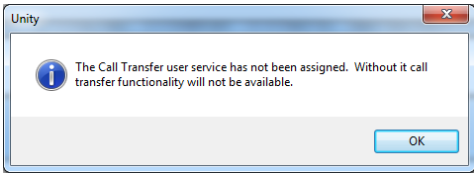
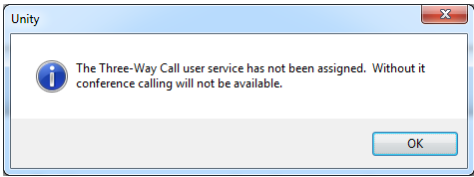
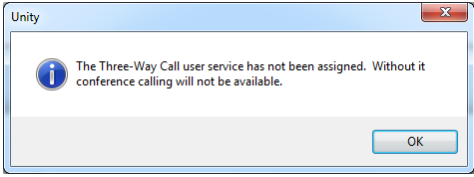
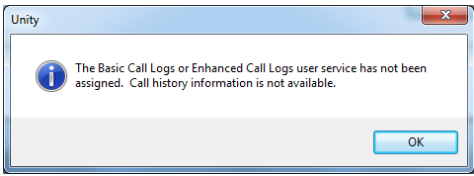
The Client Call Control service, assigned to the user, is mandatory as this is the service that allows Unity to integrate with the VoIP platform. If this service is not assigned, then the user will be alerted and Unity will not provide any functionality.



Internal calling line ID delivery and 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



	<p>will function, but the user will be prompted that this functionality will not be available.</p>	
<p>Call Transfer</p>	<p>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.</p>	
<p>Three-Way Call or N-Way Call</p>	<p>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.</p>	 
<p>Call Logging</p>	<p>Either Basic Call Logs or Enhanced Call Logs must be assigned to the user in order to see dialed, received and missed calls. Unity will alert the user if neither service is assigned.</p>	

2. INITIAL SETUP

When Unity is started, all users are prompted to enter the configuration details and then restart Unity to update the system with the changes. Unity will then retain the connection and authentication details for later use during future access requests.

1. Enter the **Login ID** and **Password** assigned to you.
2. Place checks in the optional **Remember my...** checkboxes as desired.
3. Enter 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 set to **2208**
4. The Unity Server Connection Details are predefined and do not require change.
5. Elect whether to **Log Connections**.
6. Click **Log In**.
7. Close and Restart Unity Agent to update all settings and begin.

Broadworks Login Details

Login ID

Password

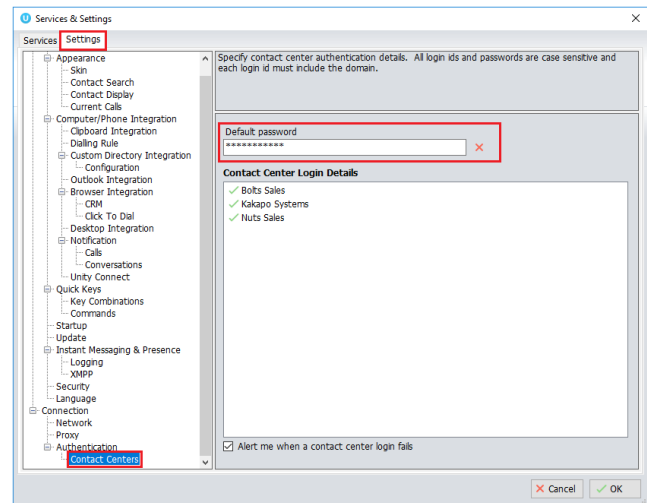
Remember my login ID

Remember my password

SET CALL CENTER LOGIN DETAILS

Once Unity has been restarted after login, it connects to the host BroadWorks system and populates all Call Center Instance IDs for the Call Centers assigned to the Supervisor in BroadSoft. A password must be added for each Call Center in order to populate the Personal Wallboard with Call Center Statistics based on the template used by the organization. Settings for Call Center setup are easy to update and manage.

To access Call Center login settings, go to: **Settings > Settings > Connection > Authentication > Call Centers**.



SET A DEFAULT PASSWORD FOR ALL CALL CENTERS

Please note that all Call Center passwords have to be the same for this option to work. If all Call Center passwords are the same, use the to enter the password for the Call Centers.

1. Enter the password in the **Default Password** option at the top of the list.
2. Select **Alert me when a Call Center login fails** to be notified when Supervisor starts and cannot login successfully to a Call Center.
3. Click **OK** to save
4. Restart Unity to update the system.

Unity will automatically save and use the entered password information when a new Call Center is added in the future.

Broadworks Server Connection Details

Server address

Server port
 2208

Unity Server Connection Details

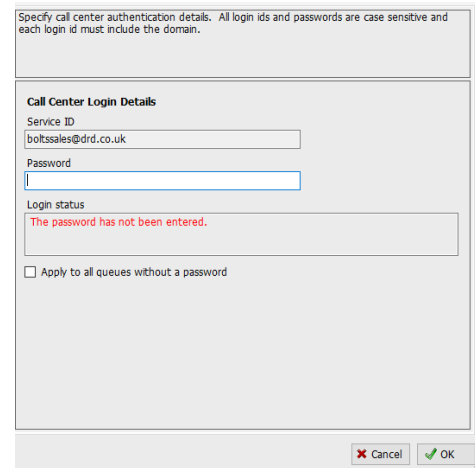
Server address:
 im.unityclient.com

Server port:
 2208

Log connections

SET INDIVIDUAL CALL CENTER PASSWORDS

1. Double-click a Call Center in the list to add the password.
2. Select **Apply to all queues without a password** if you wish to use this password for any other Call Centers that do not yet have a password setup.
3. Click **OK** to save and select **Yes** to restart Unity and update the system. Unity will log into each Call Center queue using the passwords defined for them and begin to populate the Personal Wallboard automatically at start up.



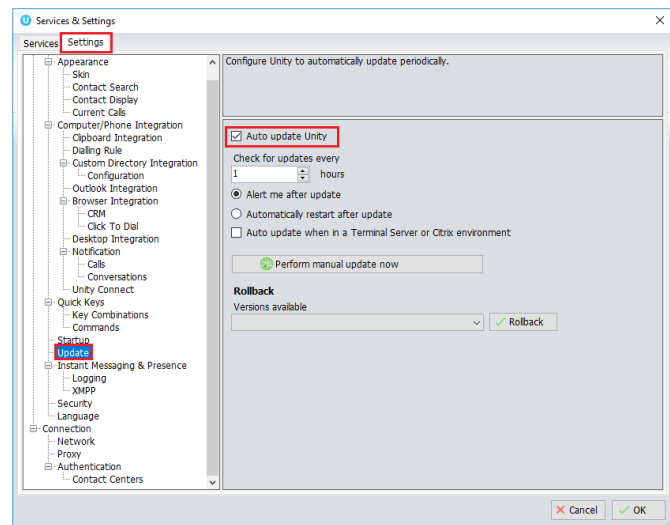
SETUP UPDATE AND ROLLBACK

Unity allows users to manually search for version updates and can be configured to automatically update when a new version is available. If a new version of Unity is updated, the user will be presented with a popup asking to restart Unity. Once Unity has restarted the latest version will be running.

Go to: Settings > Settings > Update.

SET AUTO UPDATES

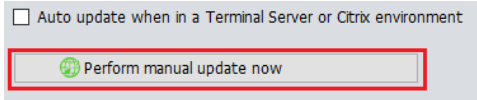
1. Select **Auto Update Unity** to enable automatic updates.
2. Set the following as desired:
 - **Check for updates every X hours** – choose a number to define how often Unity looks for an update.
 - **Alert me after update** – enable to be presented with a popup asking to restart Unity
 - **Automatically restart after update** to let Unity restart automatically after an update without requiring confirmation from the user.
 - **Auto update when a Terminal Server or Citrix environment.**
3. Click **OK** to save
4. Restart Unity to update the system whenever changes to settings are made.



Manually Update Unity

Unity will search for any new updates and allow the user to confirm further actions.

While in the Update view (Settings > Settings > Update)

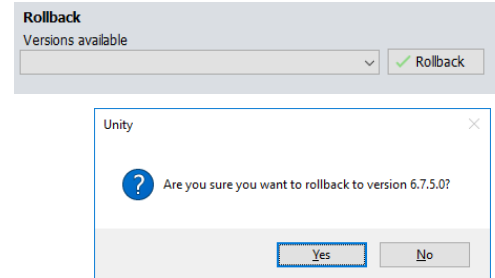


1. Select the **Perform manual update now** button and follow the prompts to manually update Unity.

SET ROLLBACK AVAILABLE

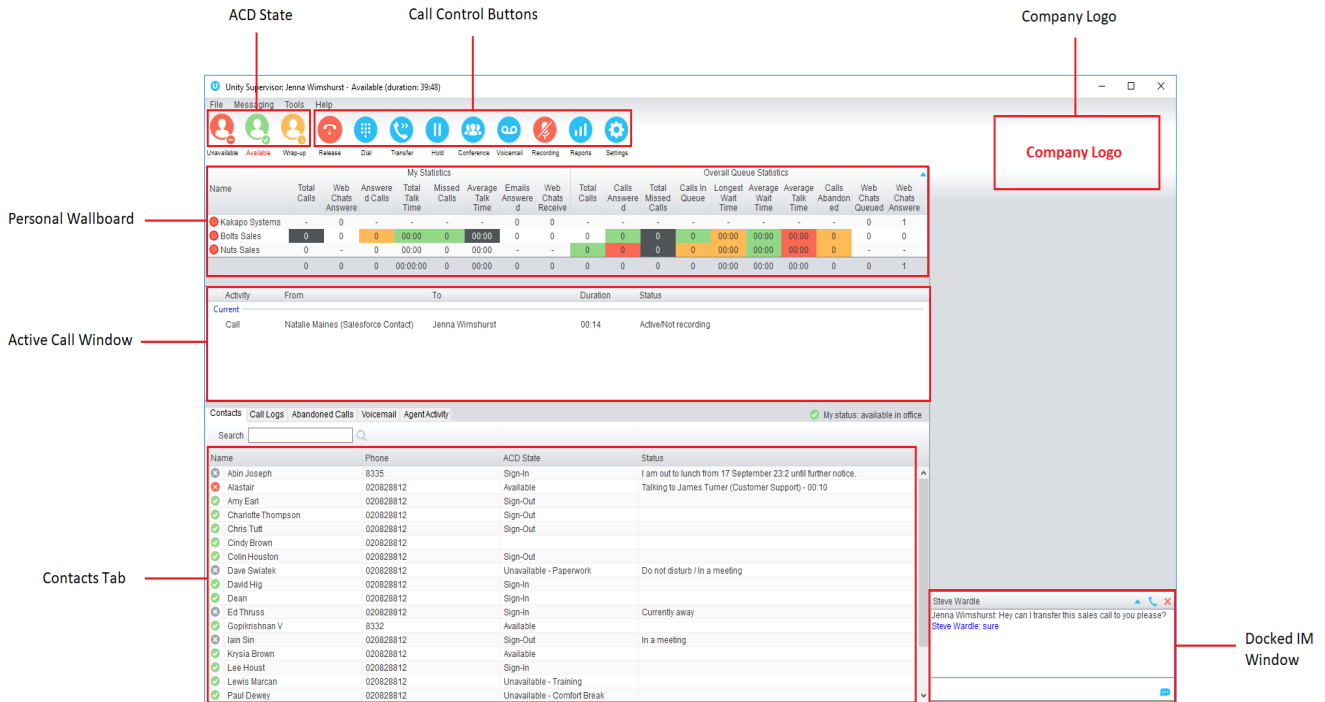
If rollback available is enabled in the Unity portal, then Supervisors can rollback to previous versions of Unity.

1. Choose the desired version from the **Rollback** drop down menu.
2. Click the **Rollback** button.
3. Click **Yes** to confirm the action when prompted.
4. Click **OK** to return to the selected version.



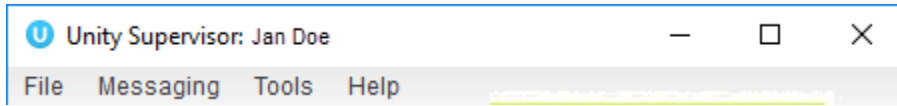
3. APPLICATION TOUR

Unity provides access to six functional areas: ACD Buttons, Call Controls (plus Reports and Settings), Personal Wallboard, Active Call Window, Contacts Panel, and Instant Messages. The Contacts panel displays tabs to review Call Logs, Abandoned Calls, Voicemail and Agent Activity (where these features are enabled for use by the organization).



TOOLBAR

Typical windows controls and simple menu access to all areas are provided via the Toolbar at the top of the display as well as the quick access icons, buttons and right-click menus that are provided in the display areas below.



- **File:** Menu access to Restart and Close the application.
- **Messaging:** Menu access to Start Conversation and select a contact to instant message.
- **Tools:** Menu access to the Settings tools.
- **Help:** Menu access to Unity online Help documentation, the About Unity information, Get remote assistance, and Export Unity Settings (to a file location in the installation folder).
- **Window Minimize/Maximize:** The – icon minimizes the application window, and the □ icon maximizes the window on the desktop.
- **Close:** The X icon at the top right side of the window closes the window and application.

ACD STATE BUTTONS

This section is only available if the Supervisor is assigned to a Call Center Agent service (Standard or Enterprise). The ACD State buttons offer Supervisors the ability to quickly set their availability for Call Centers to Available, Wrap Up or Unavailable just like Agents would in their Unity application view. When Unavailable is selected, the user may be presented a list of predefined unavailable codes (as configured in BroadWorks) from which to select, or Unity may be setup to automatically use a specific code for 'Unavailable'. The current state is highlighted in Red text.




CALL CONTROLS




All calls are managed through the simple Call Control buttons at the top of the application. The 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 or Voicemail or Reports are not assigned or enabled by the organization, then the buttons will not be displayed. Call Controls update to reflect the current state of the selected call in the Active Call Window below.



For example, the Answer/Release and Hold/Retrieve buttons change to assist the user as call states update. When an inbound call is ringing, **Answer** is the valid option. Once the call is active, the button changes to **Release** to allow the user to hanging up when ready. Two additional control buttons are provided: **Reports** and **Settings**, to make it easy to complete common tasks when necessary.

PERSONAL WALLBOARD

The Personal Wallboard displays current performance metrics for the Call Centers the user 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] 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]. The color codes within the display (green, yellow, red, and black) are user-defined alert thresholds for the statistics, and can be managed in Services. Maximized View

My Statistics									Overall Queue Statistics									
Name	Total Calls	Web Chats Answered	Answered Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answered	Web Chats Receive	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	-	-	-	-	-	-	-	-	0	3
 Bolts 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	00:00	0	00:00	-	-	0	0	0	0	00:00	00:00	00:00	0	-	-
	0	0	0	00:00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	3



Minimized View

My Statistics									Overall Queue Statistics									
Name	Total Calls	Web Chats Answered	Answered Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answered	Web Chats Receive	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
Summary	0	0	0	00:00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	3

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

If the Supervisor is not also an agent for the queue in BroadWorks, 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.



When the user is also an agent

My Statistics							Overall Queue Statistics									
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Staffed Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staffed Ratio		
 Bolts Sales	0	0	0	00:00:00	00:00	-	0	0	0	0	00:00	00:00	00:00	1/5		
 Nuts Sales	0	0	0	00:00:00	00:00	-	0	0	0	0	00:00	00:00	00:00	1/9		
	0	0	0	00:00:00	00:00	00:00:38	0	0	0	0	00:00	00:00	00:00	2/15		

Call Center icons are green and red to show that the user is either joined or not joined to the Call Center queues.

As the user is assigned as an agent in BWKS the agent statistics are populated with the user's own statistics.

When the user is not an agent

My Statistics							Overall Queue Statistics									
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Staffed Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staffed Ratio		
 Bolts Sales	-	-	-	-	-	-	0	0	0	0	00:00	00:00	00:00	0/0		
 Nuts Sales	-	-	-	-	-	-	0	0	0	0	00:00	00:00	00:00	0/0		
	0	0	0	00:00	00:00:00	00:00:38	0	0	0	0	00:00	00:00	00:00	0/0		

Call Center icons are grey to show that the user is not able to join or leave the Call Center queues.

As the user is not assigned as an agent in BWKS the agent statistics are replaced with dashes.

ACTIVE CALL WINDOW

This section provides a list of all current calls and their state (Ringing, Active, On Hold). The duration of the call is also displayed from the moment the call was first placed, and does not reset when a call is Held or Retrieved. Unity mirrors any call handling made on the user’s IP phone, so if the call is placed on Hold on the handset, the user will show as being on Hold in the Active Call Window.

The Active Call Window offers an interactive visual representation of the status of all calls the user receives or is currently managing and access to manage those calls.

From	To	Duration	Status
Jenna Wimshurst Jenna Wimshurst	03456040626 Sasha Gorb	00:18 00:00	On hold Ringing

From – This field displays 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 column shows the Ringing/Active and on On Hold status of each call.

Users can also review all calls or their own calls in queue for the Call Centers they are joined to, as shown below.

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

CONTACTS PANEL

The Contacts panel at the bottom of the display shows up to 30 monitored users and the icons indicating the current status of each (Do Not Disturb [grey], Available [green], Engaged [red] or Ringing [orange]). This section also provides tabs to view the [Call Logs](#), [Abandoned Calls](#), [Voicemail](#) and [Agent Activity](#) where each of those features are enabled for use by the Supervisor.

Name	Phone	ACD State	Status
Adam Joseph	8330	Sign-in	I am out to lunch from 17 September 23:2 until further notice.
Alexander	009028810	Available	Ringing to James Turner (Customer Support) - 00:10
Amy Earl	009028810	Sign-Out	
Charlotte Thompson	009028810	Sign-Out	
Chris Tull	009028810	Sign-Out	
Cindy Brown	009028810	Sign-Out	
Colin Houston	009028810	Sign-Out	
Dave Daniels	009028810	Unavailable - Paperwork	Do not disturb / in a meeting
David Hig	009028810	Sign-in	
Dean	009028810	Sign-in	
Ed Thrupp	009028810	Sign-in	Currently away
Gopichandran V	8330	Available	
Ian Gill	009028810	Sign-Out	In a meeting
Kevia Brown	009028810	Available	
Lee Hovatt	009028810	Sign-in	
Lewis Marcan	009028810	Unavailable - Training	
Paul Denny	009028810	Unavailable - Conflict Break	

CALL LOGS

The Call Logs tab provides access to review lists of Missed, Received and Dialed Calls with a date and time stamp showing the most recent call at the top of the list. Up to 20 numbers are shown 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 in these lists.

Call Date	Phone Number	Name
11/08/2016 16:01:38	1248	Chris Tutt
11/08/2016 12:37:31	0139:	0139:
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, by clicking on the Export button and following the prompts.

The **Call Logs** tab within the Contacts panel provides access to the Missed Calls, Received Calls and Dialed Calls lists. Missed Calls will include both direct inward DID calls, ACD and Hunt Group calls. Up to 20 numbers can be stored (unless the user has Enhanced Call Logs service assigned, which offers greater storage). Call Logs can also be cleared, reloaded or exported via the icons at the top of the panel.



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 within the Contacts panel. 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.

Call Date	Call Center	DNIS	Number
24/09/2018 10:20:18	Bolts Sales		+447976493816
24/09/2018 10:31:43	Bolts Sales		+447720771513
24/09/2018 10:31:57	Bolts		+447720771513
24/09/2018 10:32:59	Bolts		+447720771513
24/09/2018 10:33:21	Bolts		+447720771513
24/09/2018 10:43:24	Bolts		
25/09/2018 10:45:50	Bolts		
24/09/2018 09:16:01	Custc		
24/09/2018 11:58:46	Custc		
24/09/2018 14:24:04	Custc		
24/09/2018 15:05:41	Customer Support		
24/09/2018 15:51:37	Customer Support		

Voicemail

The Voicemail tab displays a list of voice messages with the most recent at the top if Unified messaging is in use. Double-click an entry to play through the PC’s default media player. Right-click to save locally or delete.

Call Date	Name	Phone Number	Duration
06/04/2016 18:47:05	James Smith	1312	00:00:43
03/04/2016 18:43:22	Lewis Marcantonio	1265	
26/02/2016 10:35:42	INDIA Conference Room	8330	
26/02/2016 10:34:56	INDIA Conference Room	8330	
22/02/2016 18:31:43	Hannah Carpenter (Business)	+44797066303	
15/02/2016 16:10:15	Unavailable	Unavailable	
15/02/2016 11:39:50	Parvathi M	8322	

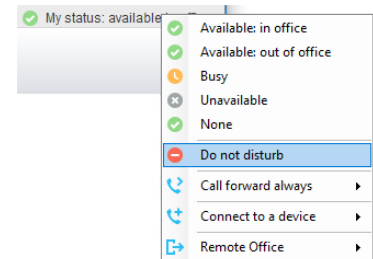
My Status

The [My Status](#) link at the top of the *Contacts Panel* displays the current status of the user and provides quick right-click access to key features and services that are regularly modified. Unity will only display the options for the services that have been assigned to the user. Some additional services available for selection here within the Right-Click Menu view include CommPilot Express (CPE), Do Not Disturb (DND), Call Forward Always (CFA), Remote Office, and Hoteling Guest (for hot-desk environments). As users change their presence/availability state, any Unity client that is monitoring that user will see the change in the icon displayed next to that user in Unity.

User State	Status Image	Description
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

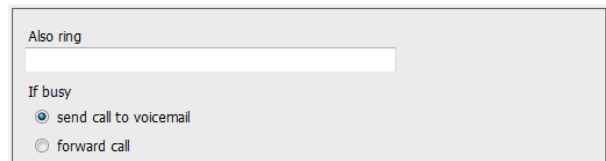
Available: In Office

A Right-Click on the My Status section opens the menu where the Available: In Office profile can be selected. This is the profile to use when you are working from the desk where you phone is located; it should represent “normal” routing rules.



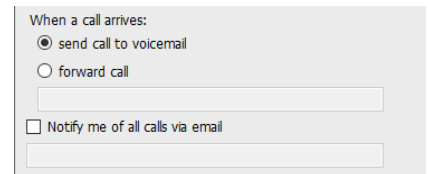
Available: Out Of Office

The Right-Click on the My Status section opens the menu where Available: Out of office may be selected. This is the profile to use when you are away from your desk for an extended period, but still available for receive calls. Examples include when in a meeting or when travelling and want to ring another line or send calls to another number and how incoming calls should be handled if the line is busy.



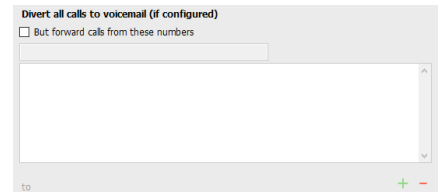
Busy

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. Users may define what the system should do while the user has selected this state (forward all calls, send calls directly to voicemail, send a notification to the user, etc.)



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. Users may specify where to send calls while away.

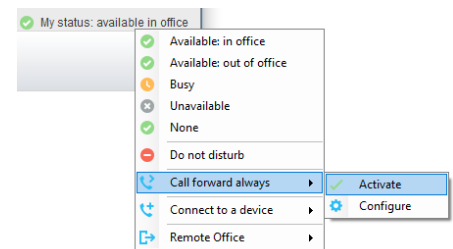


Do Not Disturb

To activate Do Not Disturb, click on the My Status link and click the menu option for Do Not Disturb. The My Status link updates to indicate this service activation, as will the Unity title bar. Anyone monitoring the user [in their Unity Contacts list] will also see that you have Do Not Disturb activated.

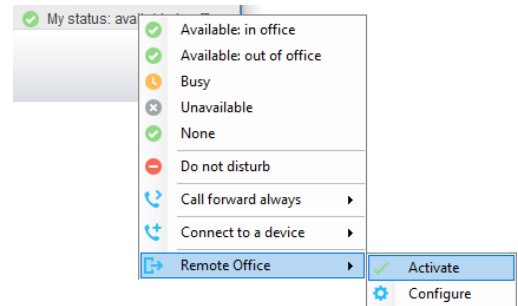
Call Forward Always

Use the My Status link to quickly activate/deactivate the Call Forward Always service, or click Configure to go directly to that service in Settings and setup preferences.



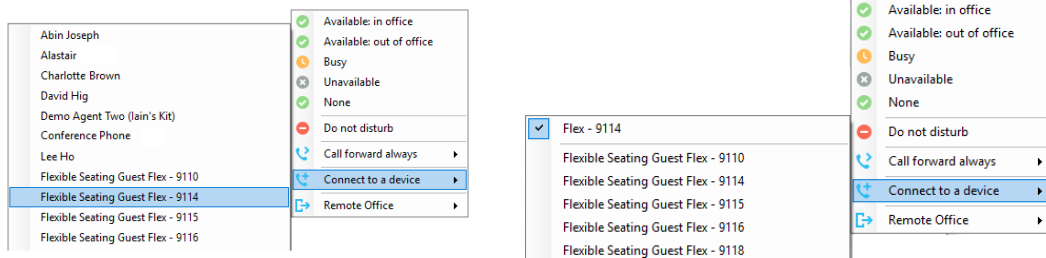
Remote Office

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.



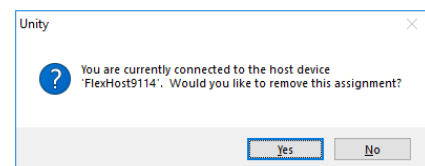
Hoteling Guest

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 selected. The user is prompted to remove the device attachment when Unity is closed.

If the user selects **No**, the device attachment remains until the association is automatically ceased by the BroadSoft.



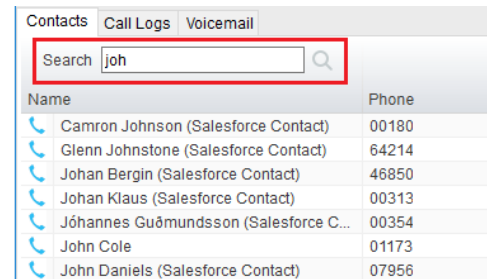
CONTACTS SEARCH

The Contacts Panel **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 Unity Administrator for assistance with CRM integration.


Directory Owner	Directory Type	Entry Type
BroadSoft	Group Directory	All other users for BLF presence as well as hunt groups and auto attendants
BroadSoft	Common Phone List	Speed dials entries at the Group level
BroadSoft	Personal Directory	The user’s own personal speed dial entries
Outlook	Personal Contacts [private folder]	The user’s 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

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 field [provided “Clear the search box when activated” is enabled in Settings as outlined in the section below.



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.

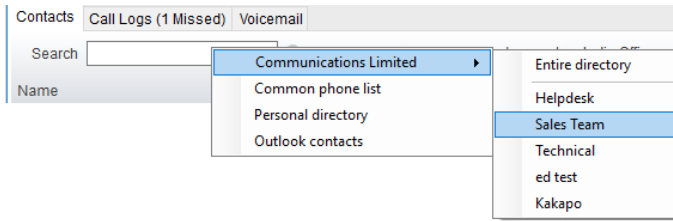
The handset  icons represent external numbers or system resources such as hunt groups for which presence information cannot be displayed. It is also possible to search using the department name to list all users of matching departments.

Load 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.

List 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.



Third Party Directories

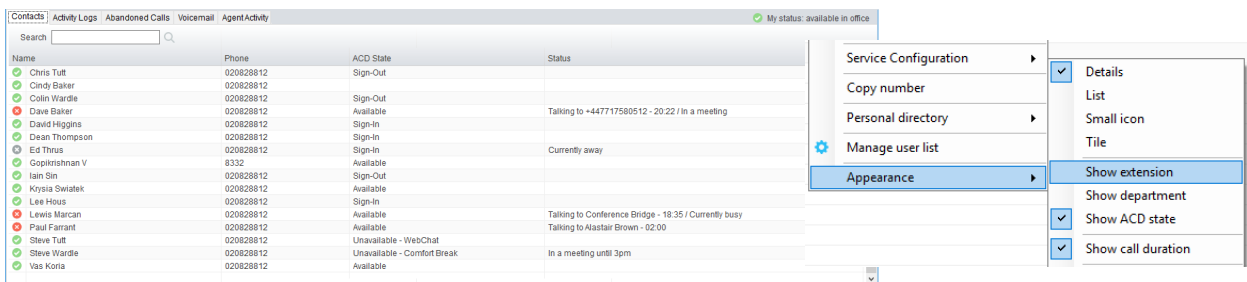
When searching BroadWorks and Outlook directories, Unity will dynamically match entries as keys are typed. For third party LDAP and SQL directories, because these are not loaded into Unity but polled each time a search request is made, search results are not listed until the Supervisor user has entered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

CONTACTS PANEL DISPLAY OPTIONS

There are four different display views available for selection. Right-click anywhere in the Contacts panel and select **Appearance** to change the view.

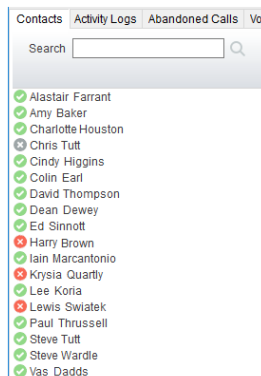
Details View

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]. 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.



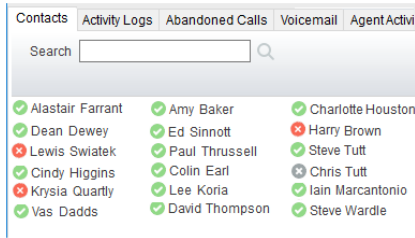
List View

This viewing option displays all monitored users in a list.



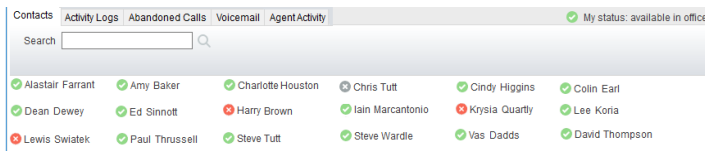
Small Icon View

This view combines a simplified look and space reduction.



Tile View

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



In both the Small Icon and Tile views, hover the mouse over the image to see more information about the monitored user.

User Availability 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
	Do Not Disturb	The user has selected DND or Unavailable profile

Hover the mouse over an engaged or DND icon for a user to 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 [this feature can be disabled for privacy reasons].



Instant Messaging Availability Icons

All users that currently have any version of Unity open will be available for instant messaging. An additional IM availability indicator displays next to the user's status icon.

	Ringing. Unity open and available for IM		Available/on-hook. Unity open and available for IM
	DND/Unavailable profile. Unity open and available for IM		Engaged. Unity open and available for IM

CONTACTS PANEL CALL CONTROL OPTIONS

There are many call control functions that can be performed by right-clicking a monitored user in the main Contacts panel or Contact 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

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.

Answer This Call [Call Pick-Up]

This will perform call pick-up and will pull the call to the ringing Supervisor user. Monitored user must be ringing [orange icon] and the Supervisor and monitored users must be in the same pick-up group.

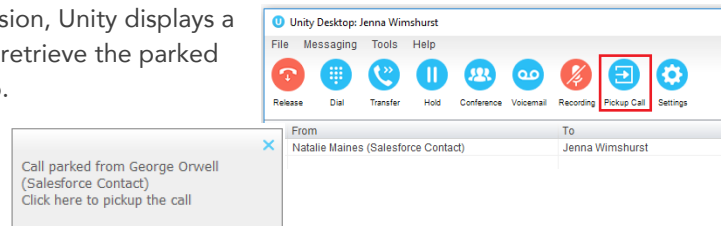
Park Call on Extension

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

Retrieve Parked Calls

Once a call has been parked onto a user's extension, Unity displays a P and notifies the user with a pop-up dialog. To retrieve the parked call, click either the Pickup button or the pop-up.

If the call is not retrieved it will be redirected back to the original user who parked the call.



Camp Call on Extension

Users can camp a live call onto an 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.

Call Mobile

Places call to mobile. Any live call placed on hold. The monitored user must have their mobile number entered in BroadWorks

Transfer Call to Mobile

Performs blind transfer call to monitored users mobile. The destination user must have their mobile number entered in BroadWorks

Transfer Call to Voicemail

Performs a blind transfer of a live call to the destination user’s voicemail. The destination user must have voicemail service assigned.

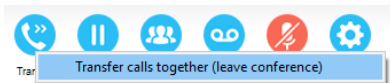
Barge into This Call

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.

From	To	Duration	Status
Sasha Gorb	Jenna Wimshurst	00:15	Active (conference)/Not recording
Jenna Wimshurst	01268508018	00:02	Active (conference)/Not recording

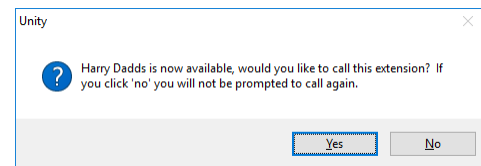
Please note that when leaving a call that you barged into, you must transfer the call parties together in order to leave the conference without ending the original call. To do this either drag one call on top of the other in the Active Call List, or press Transfer then select the option to leave the conference, as shown below.



Note: The Supervisor user must have directed call pick-up with barge-in service assigned, the Monitored user must be engaged on a call, and the monitored user must not have the barge in [Exempt service](#) setting enabled.

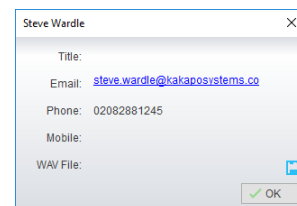
Call Extension When Available

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



View User Details

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




Add Audio Alerts to Monitored Users

The “View user details” box also allows a user to specify a .wav file to 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.

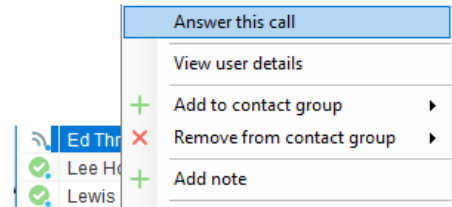
Send Email

Opens a new email window in the default Email application. The user must have an email address defined in BroadWorks.

Answer This Call [Call Pick-Up]


When monitored users are ringing their icon in Contacts becomes orange . To perform pick-up and answer the call right click the icon and select "Answer this call". This option is only displayed when right clicking a ringing user.

Note: 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.

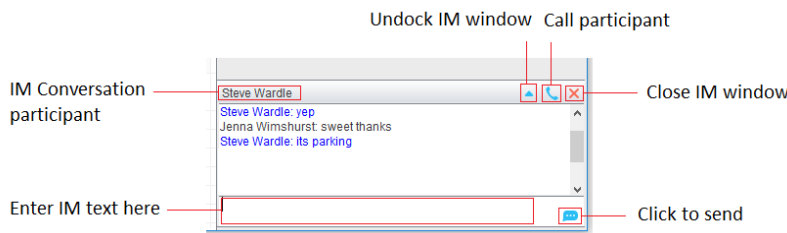


INSTANT MESSAGING

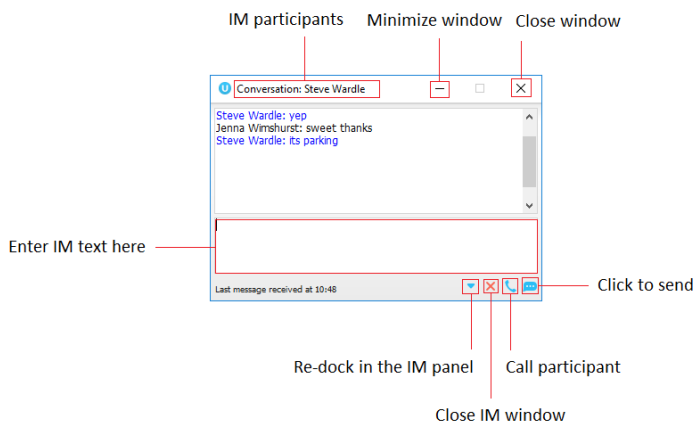
Instant messages can be sent and received between any Unity app [Reception, Desktop, Agent, or Supervisor]. Messages sent to offline user [those that do not have an instance of Unity open] can be stored and delivered when the recipient next opens Unity.

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  envelope at bottom right.

IM Window - Docked



IM Window – Undocked



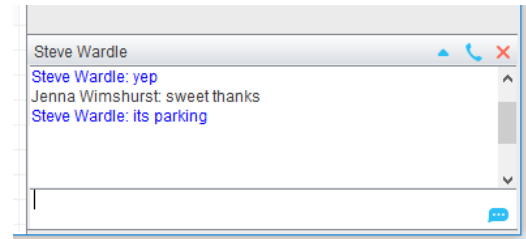
ONLINE/OFFLINE INDICATOR

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		
Engaged		
DND/unavailable profile		

DOCK 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.



UNDOCK AND RE-DOCK IM SESSIONS

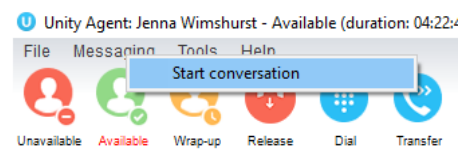
You can undock an IM message by clicking the “Expand conversation to separate window” button. The IM session will now be a standalone window.

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

SEND AN INSTANT MESSAGE

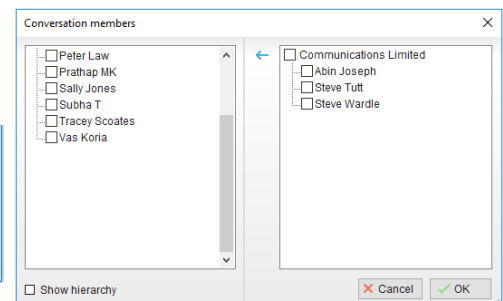
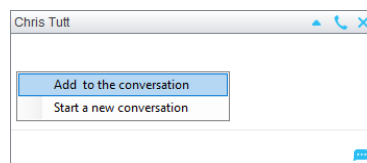
Send an instant message either by right clicking a user icon in Contacts panel or Search and selecting “Instant Message” from the drop list, or by dragging a user icon into the docked IM panel. Alternatively, you can select Messaging > Start Conversation from the top menu bar.

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.



ADD 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.



SEND 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.

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

IM NOTIFICATION SETTINGS

Click on a notification to respond. Note: All notification options for IMs, including sounds and popup notifications can be modified in Settings under Instant messaging & Presence.



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.

UNITY DISPLAY OPTIONS

RESIZE

The Unity window 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. When Unity is closed, all current dimensions will be saved.

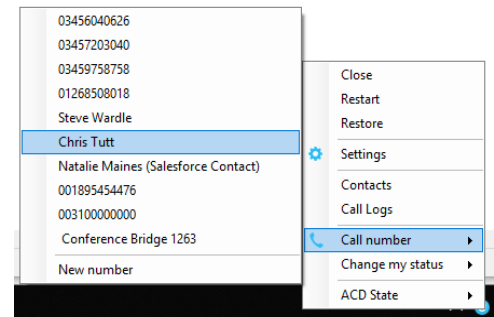
MAXIMIZE AND MINIMIZE

Unity can be maximized and minimized using the standard buttons in the top right hand corner of the application. When minimized, Unity appears in the system tray in the bottom right corner of the desktop where the Unity icon displays, or in the task bar (as defined by the user). To re-open Unity simply double click the Unity icon, or right-click and select **Restore** from the menu.

ACCESS UNITY SUPERVISOR FROM THE SYSTEM TRAY/TASKBAR

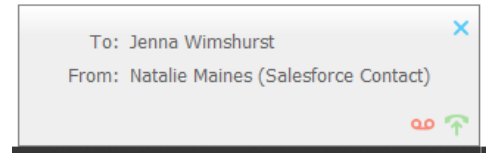
In its minimized state, Unity Supervisor can be configured to sit in the System Tray or Taskbar in **Settings > Settings > Appearance**. The Unity icon in the system tray allows the user to right click and select Dial or Redial, configure settings such as CommPilot Express Profiles, DND, Call Forward Always or Remote Office, or change their ACD state using the context menu. Note: Only those services that are assigned to the user in BroadWorks will be displayed.

Selecting “Call 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.



CALL SUMMARY NOTIFICATIONS

The Call 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.



BROWSER SCREEN-POPS

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. Any summary notification is 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.

STAFFED RATIO

The Personal Wallboard in Unity Supervisor includes “Staffed Ratio”, an additional statistic 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 BroadWorks.

Staffed Ratio
1/6
1/9
2/15

LONGEST WAIT STATISTIC

By default, Unity Supervisor displays the “Longest Wait Time” statistic. 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 statistic can optionally be removed in **Settings > Services > Columns > Call Center > Columns**. Click on the statistics you want to remove then click the minus sign to remove it.

STATISTICS REFRESH TIMER

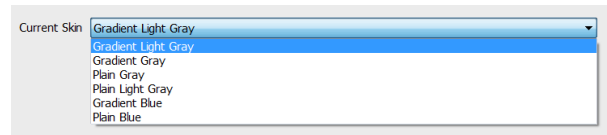
If the Client Call Control service is assigned to the queue in BroadWorks then the “Calls in Queue” statistic [as shown in Personal Wallboard in Agent and Supervisor and Wallboard] will be a real-time statistic. The “Longest Wait” statistic is also real-time, in that it will start showing the wait duration 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 BroadWorks 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.

SKINS

Unity Supervisor allows users to modify the visual display using pre-defined Skins that offer additional color options.

To change the look of Unity with pre-set Skins:

Go to **Tools > Appearance > Skins** and select the desired option from the drop-down menu.

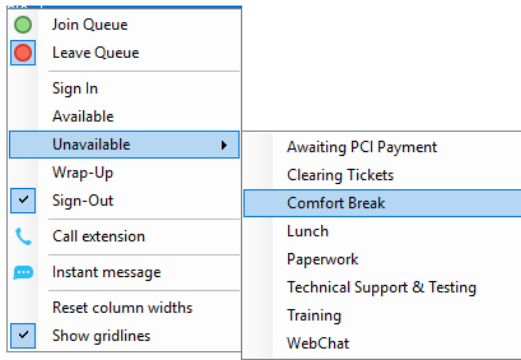


4. SUPERVISOR TASKS

REMOTELY CHANGE AGENT ACD STATE

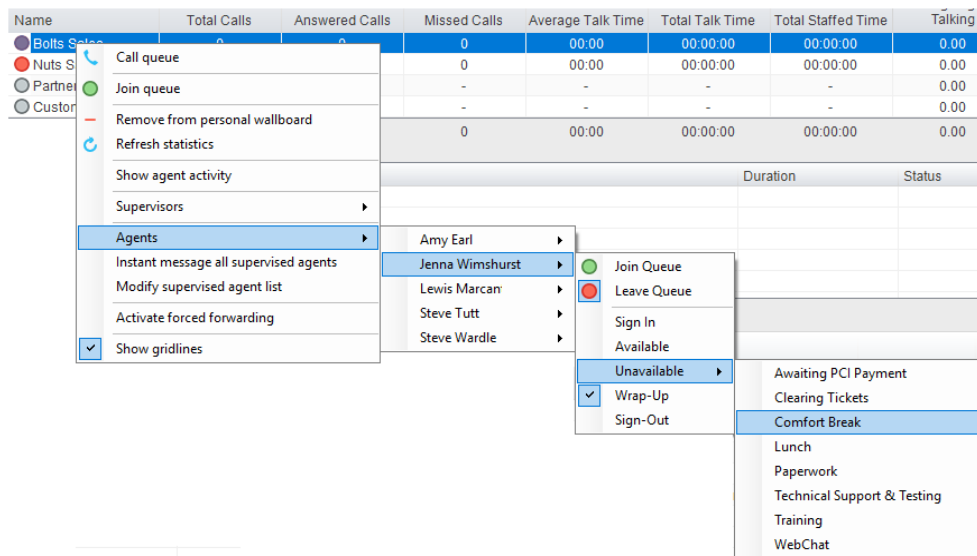
The supervisor can change the agent’s availability to the Call Center either from the Personal Wallboard, Tools menu, or the Agent Activity tab. The actions that are available are forcing the agent to Join or Leave specific queues and changing their ACD state, including the unavailable reason code (if 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 display whether the agent is currently joined to the queue and their current ACD state.



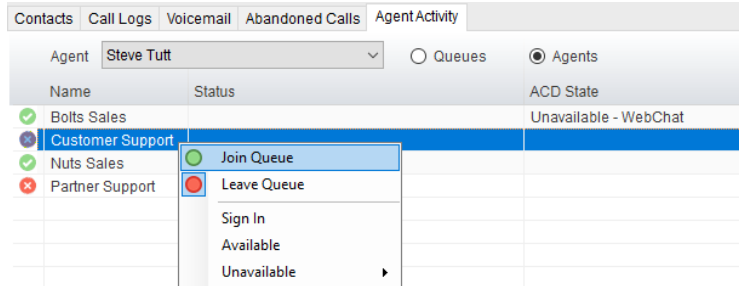
CHANGE AGENT STATE FROM PERSONAL WALLBOARD

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 also presents options to Join/Leave the agent from the queue and change their ACD State.

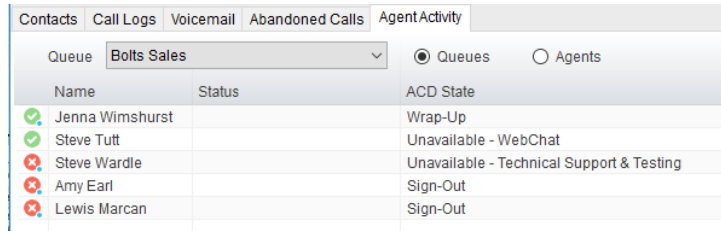


CHANGE AGENT STATE FROM AGENT ACTIVITY TAB

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.

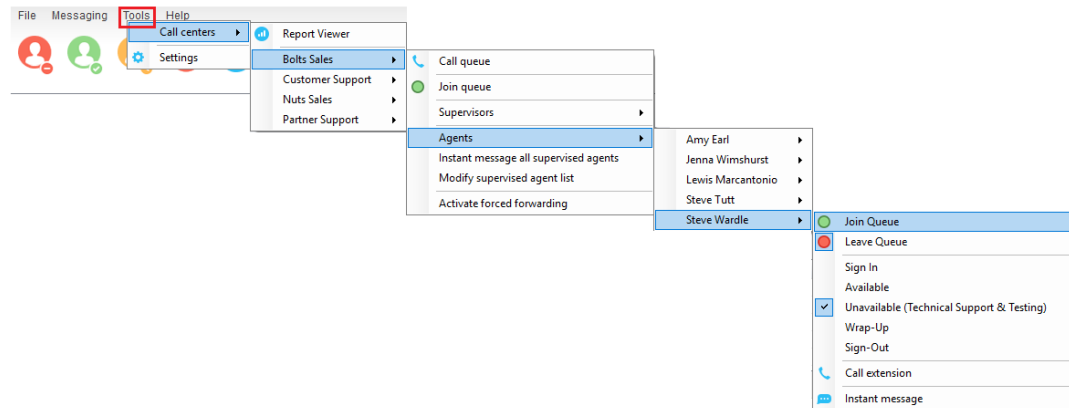


The Agent’s icon in the Agent Activity tab can be based on a range of states, for example, JoinedState which displays either red or green to represent whether the Agent is joined to the Call Center or not.



CHANGE AGENT STATE FROM TOOLS MENU

Click Tools > Call Centers to list the Call Centers currently being supervised. Mouse over a Call Center > Agents to change the agent’s ACD state.



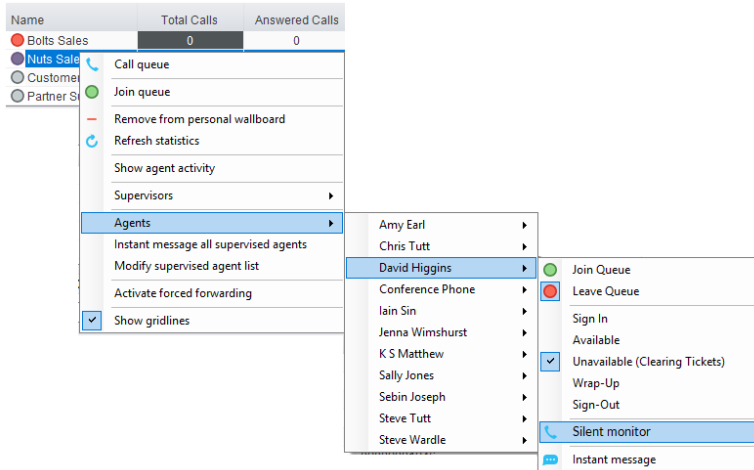
VIEW AGENT THRESHOLD ALERTS

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 behavior that allows the supervisor to take remedial action.

SILENT MONITORING

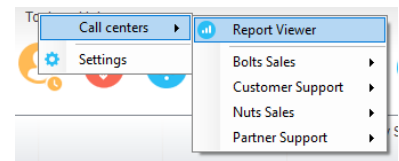
This feature allows the supervisor to silently listen to the next call or calls taken by a specified agent. It requires the Call Center *Monitoring* service to be assigned to the Supervisor in BroadWorks and Call Center Agent Premium to be in use.

To activate Silent Monitoring, right-click the Call Center queue in Personal Wallboard > Select the Agent > select Next Call Only (one time monitoring) or All Calls (continue to monitor calls until stopped).



RUN REPORTS

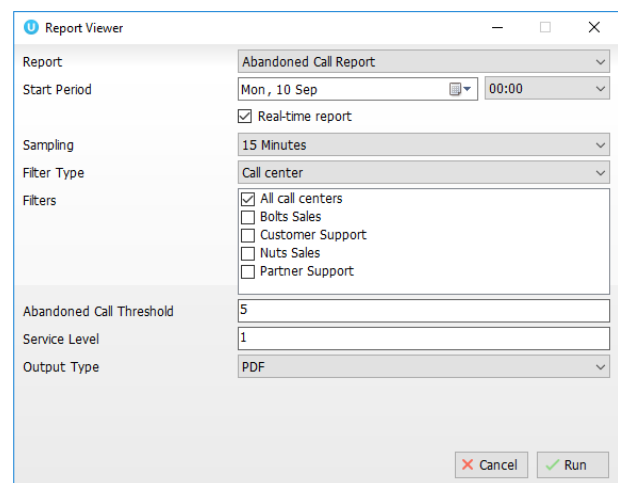
Unity Supervisor provides access to the real-time and historical reports provided by the BroadWorks DBS reporting server. The information in these reports is entirely produced by BroadWorks. To access Reports, click **Tools > Call Center > Report Viewer** or click on the Reports icon.




From the Report Viewer interface, select the desired report from the drop-down list.

Supervisor reports include:

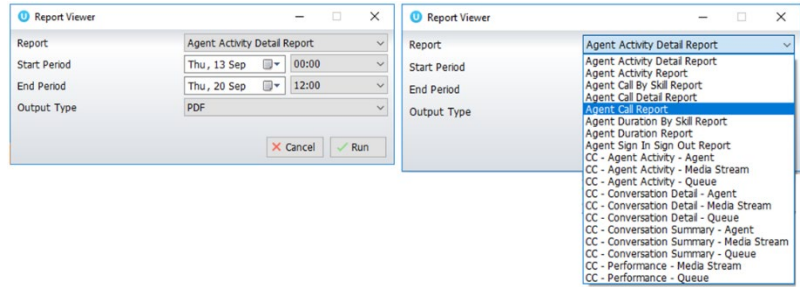
- Abandoned Call Report
- Agent Disposition Code Report
- Agent Summary Report
- Agent Unavailability Report
- Call Center Call Detail Report
- Call Center Disposition Code Report
- Call Center Incoming Calls Report
- Call Center Overflow Matrix Report
- Call Center Presented Calls Report
- Call Center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



To access these reports, click the **Reports** button  or select **Tools > Call Centers > Report Viewer** from the Toolbar menu.

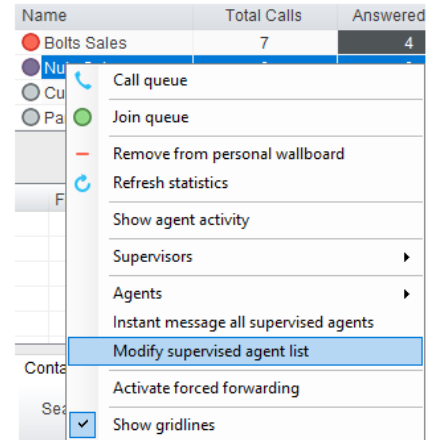
To specify the report you wish to run in the Report Viewer interface

1. Select the desired **Report** from the drop-down menu.
2. Define the reporting period **Start** and **End** times using the calendar tools.
3. Choose the **Output Type** you wish to use from the drop-down menu.
4. Press **Run** when ready.



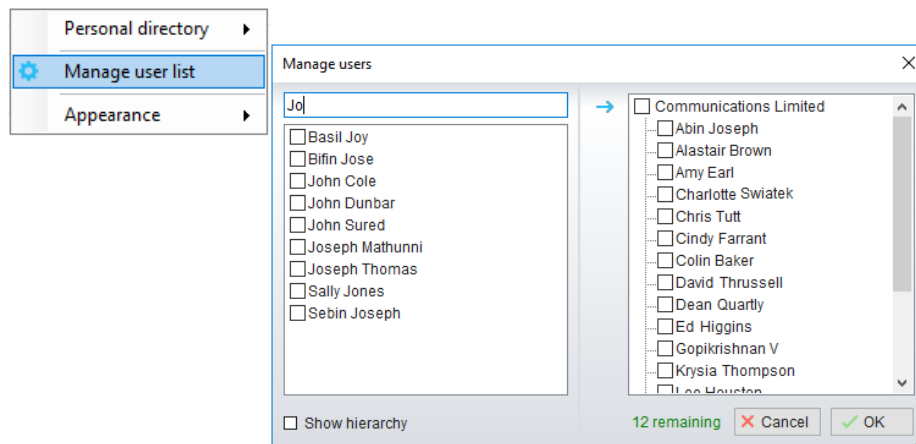
ADD AGENTS TO SUPERVISED LIST

By default, Unity Supervisor displays the list of supervised agents defined in BroadWorks. Right-click the Call Center queue in Personal Wallboard, select **Modify supervised agent list** and add the agents you want to supervise.



MANAGE MONITORED USERS LIST

The Contacts panel displays up to 30 users. Right-click anywhere in the Contacts Panel and click "Manage user list". This will allow you to search for and choose which users to display, 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.



5. SUPERVISOR AGENT TASKS

Unity Supervisor also allows a user to perform Call Center *agent* functions such as changing ACD state, joining and leaving a queue, and taking calls for that queue. Agent level functionality is dependent on the level of Unity Call Center Agent (Standard or Enterprise) assigned to the user.

CHANGE ACD STATE

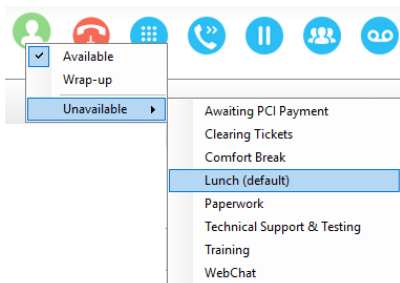


When working as an Agent, clicking Unavailable, Available or Wrap-Up will change your availability for all assigned queues. This will not impact receiving inbound direct calls. The currently selected state will have the ACD state name in red text.

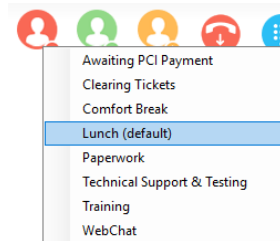
SELECT UNAVAILABLE CODES

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

Unavailable Code assignment with 1 ACD button

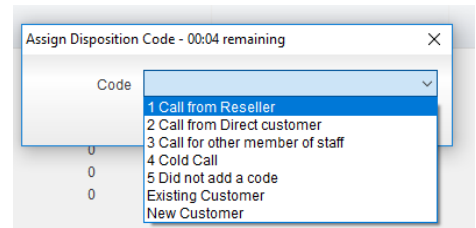


Unavailable Code assignment with 3 ACD buttons



FORCED DISPOSITION CODE ASSIGNMENT

Unity can be configured to force an Agent (or supervisor taking calls like an agent) to assign a Disposition Code for the previous call. A popup window automatically displays when the call is released. Unity sets the post-call ACD State to Wrap Up, and when the user selects Available, a drop list of Disposition Codes displays for selection before they can become Available again. Note: If this feature is enabled, the Unity UI will be disabled while the popup window appears over all applications on the user’s desktop. A timer can be defined to display a count-down to the user and automatically close once the timer duration has elapsed.




ACD STATE DURATION DISPLAY




The top bar in Unity Supervisor will show the current ACD state with the time in that state.

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

USE 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  up 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

Name	My Statistics							Overall Queue Statistics										
	Total Calls	Web Chats Answered	Answered Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answered	Web Chats Receive	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	-	-	-	-	-	-	-	-	0	3
 Bolts 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	00:00	0	00:00	-	-	0	0	0	0	00:00	00:00	00:00	0	-	-
	0	0	0	00:00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	3

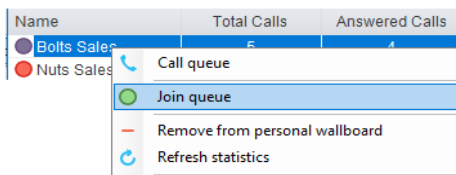
Minimized View

Name	My Statistics							Overall Queue Statistics										
	Total Calls	Web Chats Answered	Answered Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answered	Web Chats Receive	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
Summary	0	0	0	00:00:00	0	00:00	0	0	0	0	0	0	00:00	00:00	00:00	0	0	3


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




JOIN / LEAVE 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.



RECEIVE ACD CALLS

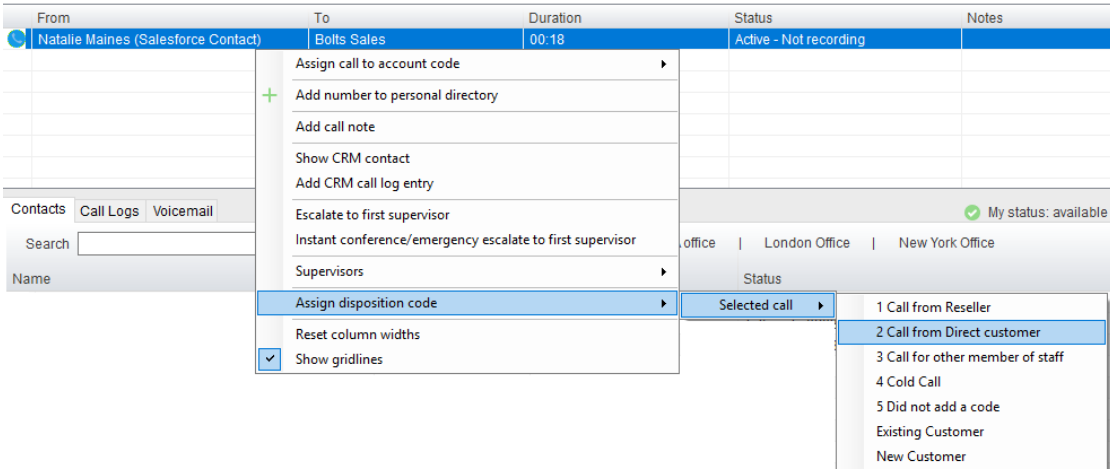
Inbound ACD calls will display the Call Center name, as configured in BroadWorks, in the "To" field. The "From" field will display the incoming CallerID [if not withheld] or the name of the caller if that can be matched from the Directory. Answer the call by lifting the IP phone handset, clicking Answer/Release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

Name	Total Calls	Web Chats Answered	Answered Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answered	Web Chats Receive	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time
 Kakapo Systems	-	0	-	-	-	-	0	0	-	-	-	-	-	-
 Bolts Sales	0	0	0	00:00	0	00:00	0	0	0	0	0	1	00:00	00:00
 Nuts Sales	0	-	0	00:00	0	00:00	-	-	0	0	0	0	00:00	00:00
	0	0	0	00:00:00	0	00:00	0	0	0	0	0	1	00:00	00:00

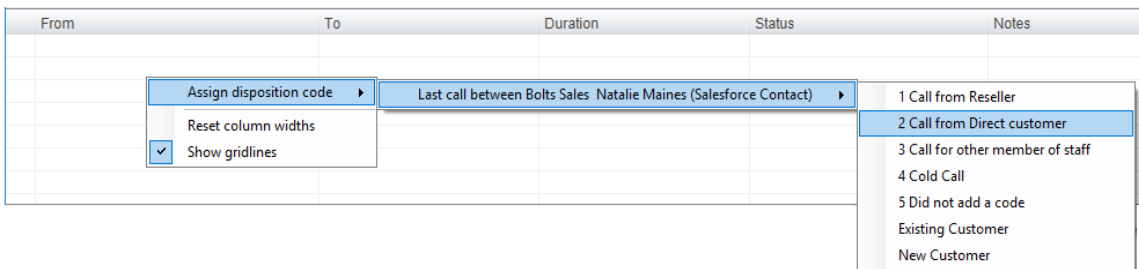
Activity	From	To	Duration	Status
Queued				
Call	Natalie Maines (Salesforce Contact)	Bolts Sales	00:00	Ringling

USE 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.



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.

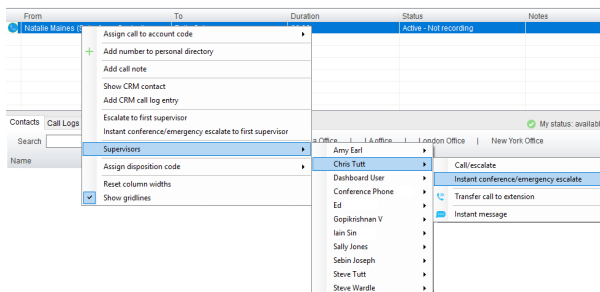


ESCALATE CALLS

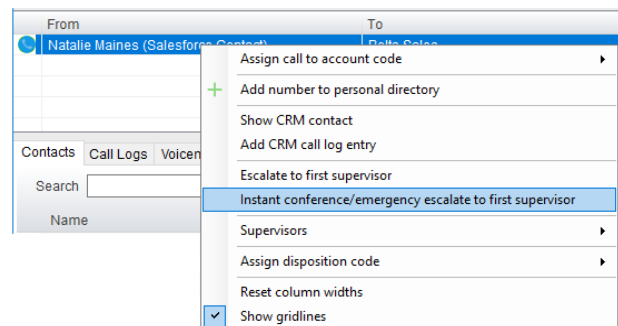
Unity Call Center Supervisor facilitates the BroadWorks Call Center [Call Escalation](#) feature by allowing both Standard and Emergency call escalation. Both types of escalation can only be performed on Call Center calls where both inbound and outbound [DNIS] calls are supported. The system can be setup to allow Agents to only escalate a call to a Supervisor that is currently supervising them in BroadWorks and receive notification through the phone that the supervisor is not a valid supervisor upon incorrect selection.

ESCALATION VIA ACTIVE CALL WINDOW

To perform escalation, the Agent right-clicks on the call in the active call window, then either chooses the supervisor to escalate the call to a listed Supervisor.

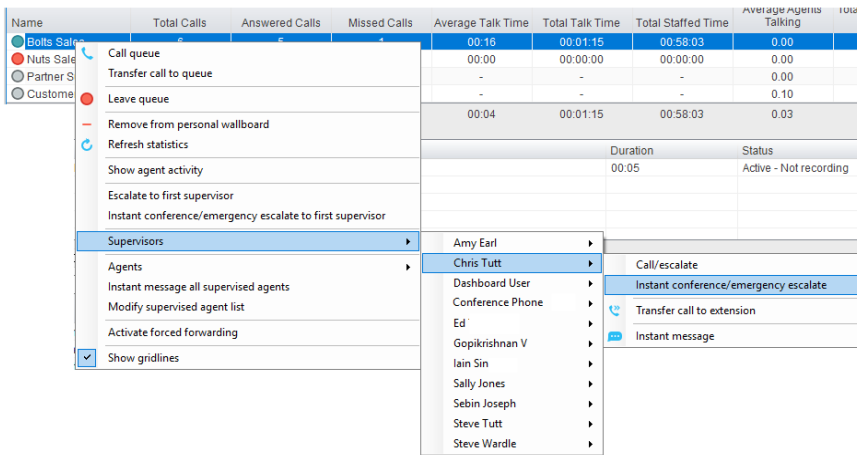


Or escalate the call to the first available Supervisor as a Standard or Emergency escalation:



ESCALATION VIA PERSONAL WALLBOARD

The supervisor can escalate a Call Center call by using the context menu displayed when right-clicking 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.

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 then 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 Call 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.

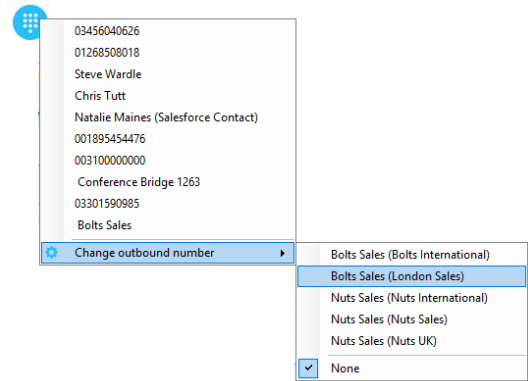
EMERGENCY ESCALATION

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. Unity will place any active calls on hold then dial the selected Supervisor, or the first supervisor that is available.

ACTIVATE 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.



PERSONAL STATISTICAL REPORTS

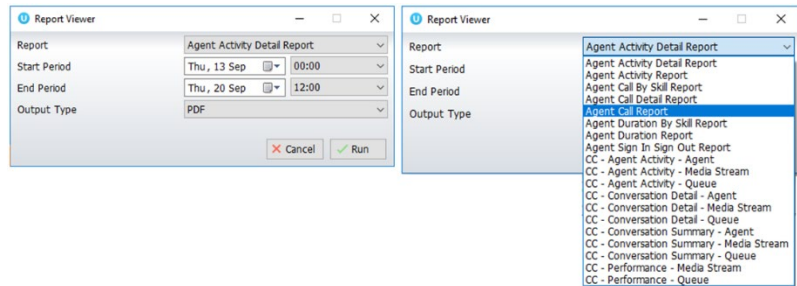
Unity Supervisor provides access to the following agent reports (refer to section 6.8 for Supervisor reports):

- | | |
|------------------------------|--------------------------------|
| 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 Toolbar menu.

To specify the report you wish to run in the Report Viewer interface



1. Select the desired Report from the drop-down menu.
2. Define the reporting period Start and End times using the calendar tools.
3. Choose the Output Type you wish to use from the drop-down menu.
4. Press Run when ready.




6. HANDLE CALLS

INCOMING CALLS


All incoming 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 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.

ANSWER A CALL

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

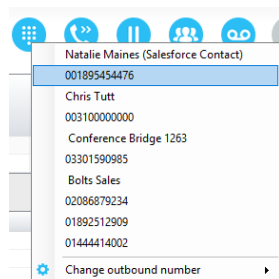
END A CALL

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.

REDIAL

Right-click the Dial icon to see a list of the last 10 dialed numbers. Simply click on an entry to dial the party.

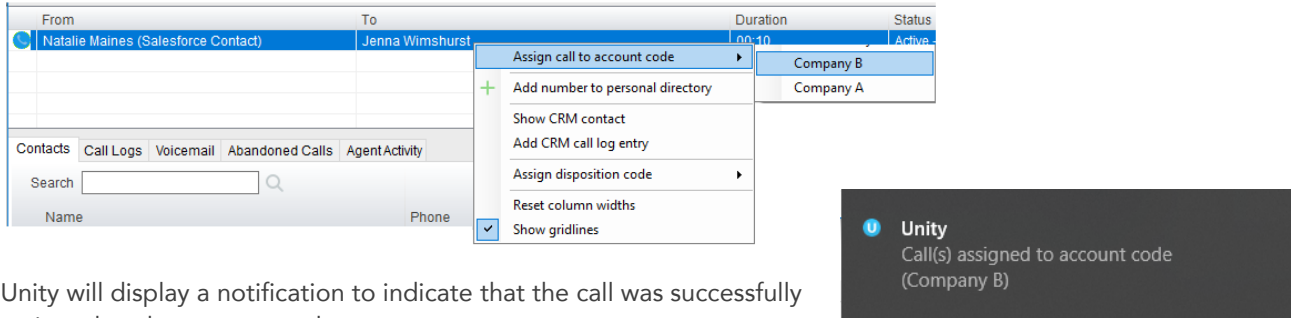


MANAGE MULTIPLE CALLS

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.


ASSIGN 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.



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

SEND 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.

Retrieve 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.


Retrieve 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.

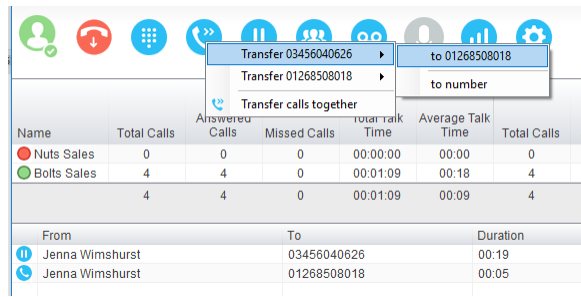
TRANSFER A CALL

There are two main ways to transfer a call: Announced Transfer (also called Warm 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. Blind Transfer is the default. Calls can be transferred both to internal users and external contacts and the user is not limited to transferring only 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 or selecting Transfer Together.

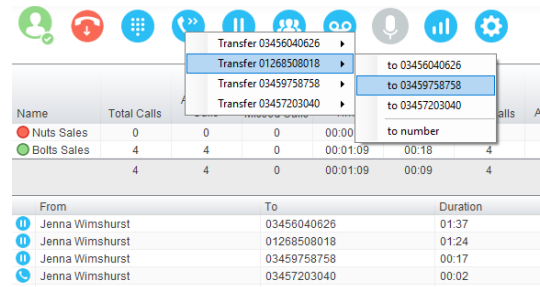
Announced Transfer

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.

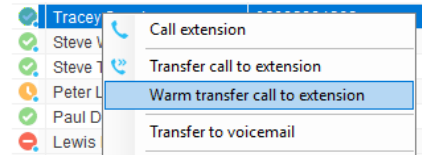
Transfer with two live calls



Transfer with four live calls

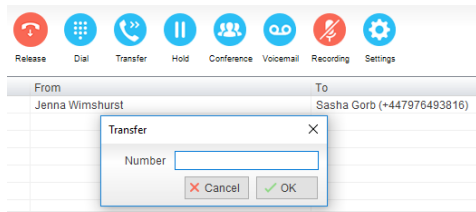


Unity Supervisor allows you to announce/warm transfer a call by right clicking the user you want to transfer the call to and selecting “warm transfer” from the context menu. This will then put the original caller on hold and dial the selected number. When ready, click the transfer button in the Call Center control options panel and the two calls will be transferred, automatically disappearing from your active call window.



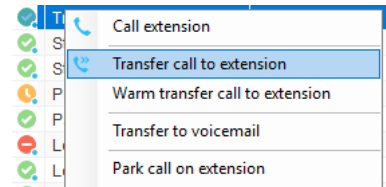
Blind Transfer

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



Drag and Drop Blind Transfer

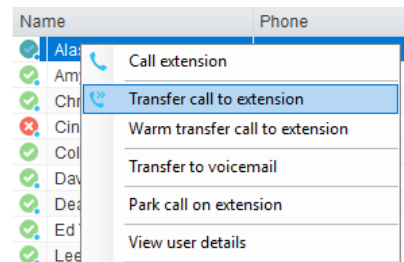
Unity Supervisor can be configured to automatically blind transfer a call by dragging the call from the Active Call Window and dropping it on a user icon or number icon in the Contacts panel, or dropping it onto a Call Center queue [if supervisor is configured as an supervisor with Call Center queues].



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.

Right-Click Blind Transfer

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.

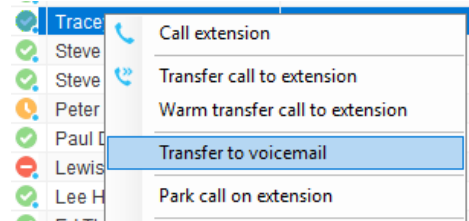


TRANSFER TO VOICEMAIL

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

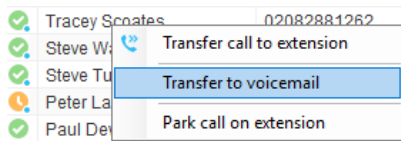
Right-Click Transfer to Voicemail

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



Drag and Drop Transfer to Voicemail


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.



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].



Right-Click Transfer to Mobile


Right click the desired user in the Contacts panel. To announce the call, click Dial Mobile. Once the recipient answers, click Transfer  and select the context menu option to transfer the calls together. To blind transfer the call without introduction click Transfer call to mobile.

Drag and Drop Transfer to Mobile


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.

CALL HOLD/RETRIEVE


The Hold/Retrieve   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	To	Duration	Status
 Jenna Wimshurst	Sasha Gorb	00:04	On hold

Place 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.

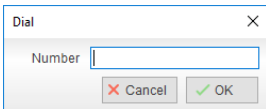
Retrieve a Held Call

Click the held call in the Current Call List to select it. Click the Retrieve button  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.

MAKE A CALL

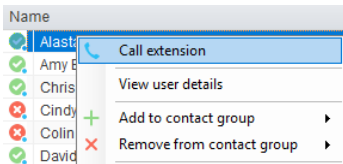
CALL FROM DIAL WINDOW

 Click the Dial button, type 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, usage of the handset will be required when the call is answered.



CALL FROM THE CONTACTS PANEL

Double-click on a user icon or Right-click and select [Call extension](#) from the menu options.



CALL USING 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.

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.


CLIPBOARD DIAL


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. Any number that is copied to the Windows clipboard, (highlight the telephone number, right-click, then click copy) displays a pop-up dialog above the system tray with the option to call the number. Click within the dialog to make the call.



CONFERENCE CALLS

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.



START 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
 Sasha Gorb	Jenna Wimshurst	00:15	Active (conference)/Not recording
 Jenna Wimshurst	01268508018	00:02	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	To	Duration	Status
 Sasha Gorb	Jenna Wimshurst	00:36	On hold (conference)
 Jenna Wimshurst	01268508018	00:23	On hold (conference)

Add 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 . You will be prompted to add the new party to the existing conference as below.


From	To	Duration	Status
 Sasha Gorb	Jenna Wimshurst	01:30	On hold (conference)
 Jenna Wimshurst	01268508018	01:17	On hold (conference)
Jenna Wimshurst	03456040626	00:05	Active/Not recording

Unity

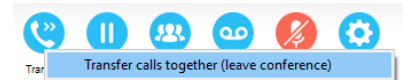
Do you want to add 03456040626 to the conference?

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

END A CONFERENCE CALL

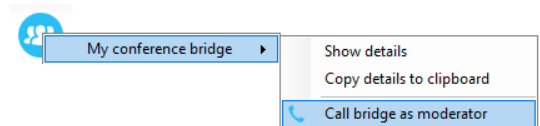
To remove a caller from the conference call but continue speaking to the other caller[s], simply select the call to release in the Active Call Window and click the **Release** button . This will release the selected party and will show only the remaining party[s] in the Active Call Window.

To end a conference call but leave the two remote parties in conversation with each other, click the **Transfer** button and select the **Transfer calls together (leave conference)** menu option.



CONFERENCE BRIDGE INTEGRATION

If this has been configured in BroadWorks, 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.



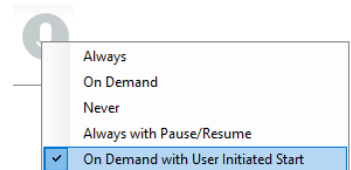
CALL RECORDING

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.



CHANGE THE CALL RECORDING OPTION



Right-click on the **Recording** button to select the desired call recording option where available. Call Recording options include:

- ❖ **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. 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



CONTROL CALL RECORDING

Users may 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  to  to indicate this. When set as Always with Pause/Resume, the user can left click to

Pause/Resume and the button will toggle as Resume [recording]  or 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 current recording state of all calls.

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



7. ADDITIONAL FEATURES

DRAG AND DROP FEATURE

Many common actions can be performed using drag and drop onto a contact or section of the Unity display.

DRAG AND DROP FOR CALLS

Make a Call to a User or Number

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

Transfer 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.


Make a Call to a Call Center Queue

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

Transfer a Call to a Call Center Queue

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 selected Call Center.

Send to Voicemail

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

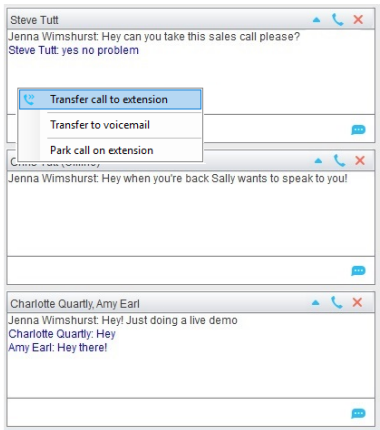
Call Controls

Drag a call over a specific Call Control button ([Hold/Retrieve](#), [Answer/Release](#), [Transfer](#) or [Park](#)) to access the tools to perform that action on the selected call.

DRAG AND DROP FOR INSTANT MESSAGES

Send a 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.

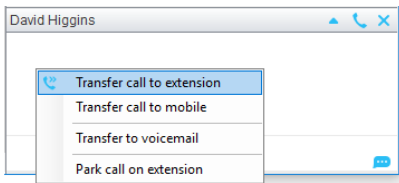


Add a Participant to Existing IM Session

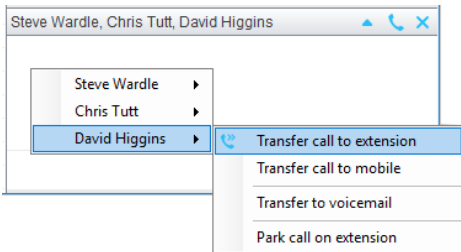
Drag a user icon onto an existing IM and choose "Add to the conversation" when prompted.

Transfer a Call to an 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 to select where to transfer the call.



PERSONAL DIRECTORY

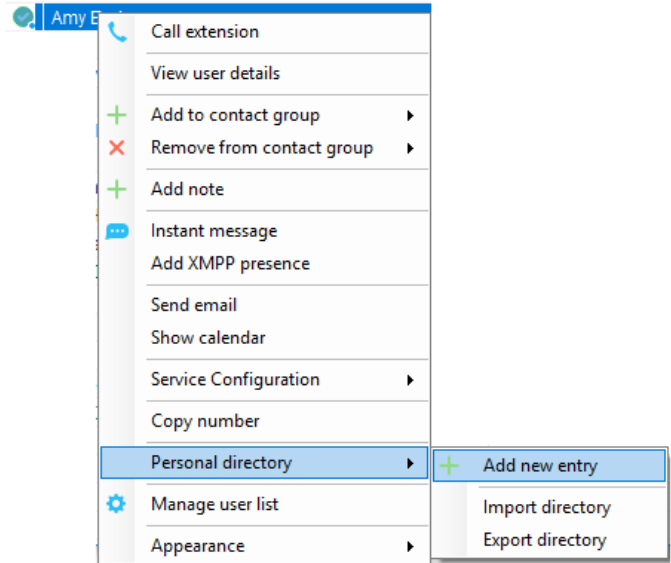
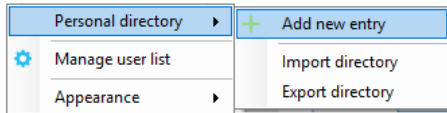
The Personal Directory is a repository on BroadWorks for each user to store personal speed dials. Using this feature in Unity will populate the directory on the host BroadWorks platform. Once numbers have been entered they are available in the Search panel or can be pinned to the main Contacts Panel. A Personal Directory entry is shown by a  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.

Right click on a monitored user and select **Personal directory > Add new entry**.

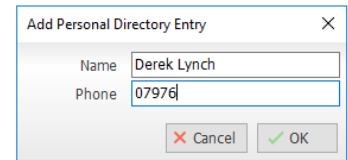
Or

In **Contacts Panel** – Right-click and choose **Personal directory > Add new entry**.



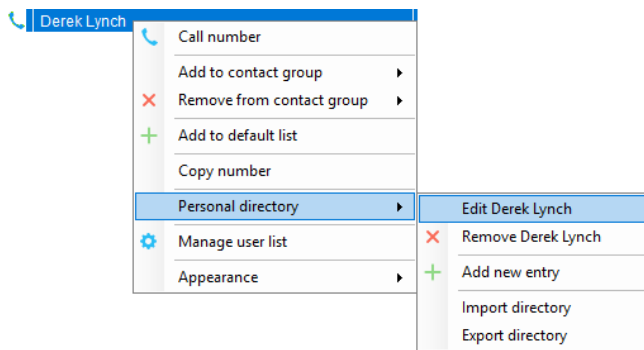
ADD NEW ENTRY

Enter the Name and Number and click OK. If the number specified is already in the Directory the user will be alerted.



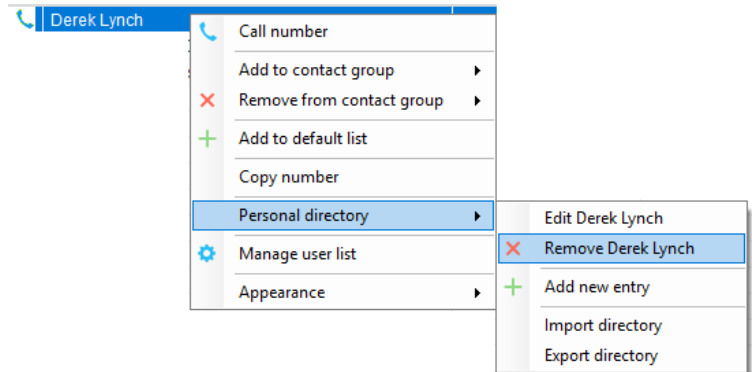
EDIT ENTRY

Use the **Search** field in the Contacts panel to locate the entry. Search by Name or Number. Right click the Entry and select “Edit” then make changes as needed and save.



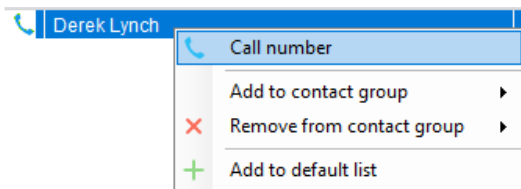
REMOVE ENTRY

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".



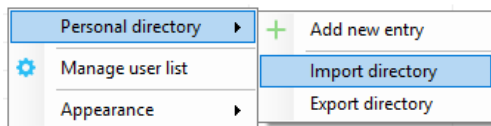
DIAL A DIRECTORY ENTRY

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".



IMPORT A PERSONAL DIRECTORY

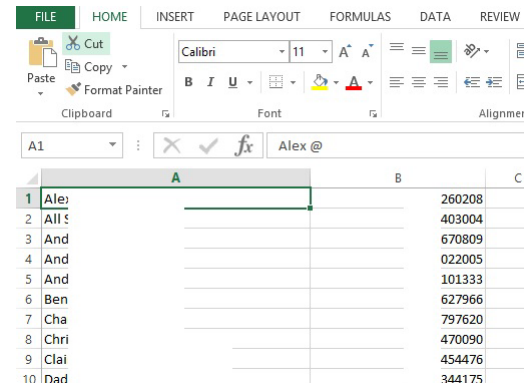
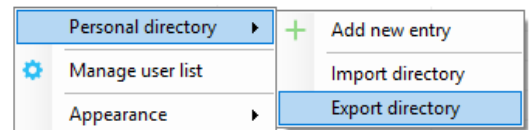
Supervisor will allow the user to import a .csv file of directory entries, provided they are in "name, number" format. Right click in the Contacts panel, select "Personal directory > "Import" and then browse to the location of the csv.



EXPORT A PERSONAL DIRECTORY

To export Personal Directory entries:


1. Right-click in Contacts
2. Select Personal directory > Export directory.
3. Follow the prompts to save the file locally. The format is .csv (spreadsheet) and the default file name is PersonalDirectory.csv The format of the csv is Name and then Number.



8. MANAGE BASIC SERVICES

Unity Supervisor is setup during Implementation to perform as the organization defined, and generally use the pre-defined Templates to specify the default setup the organization prefers. Users may have access to modify some settings and service options to assist as they work. This section offers an overview of the settings section with tips and general instructions for accessing and/or modifying commonly used settings and services for working in Unity. For assistance with other settings, contact your organization’s Unity Administrator.

NOTE: Unity must be restarted to update the system with the new information when changes to services and settings are made.

The **Settings**  icon in the *Call Controls* section (or via the Settings option in the *Tools* menu within the *Toolbar*) offers access to view the **Services Tab**. This area offers access to define specific behaviors for incoming and outgoing calls, call controls and messaging, including voicemail, and works with the BroadWorks settings that are currently defined for the user. Simply make changes and select **OK** when finished. Unity should be restarted to update the system and initiate future usage of the new Service setting(s).

INCOMING CALLS

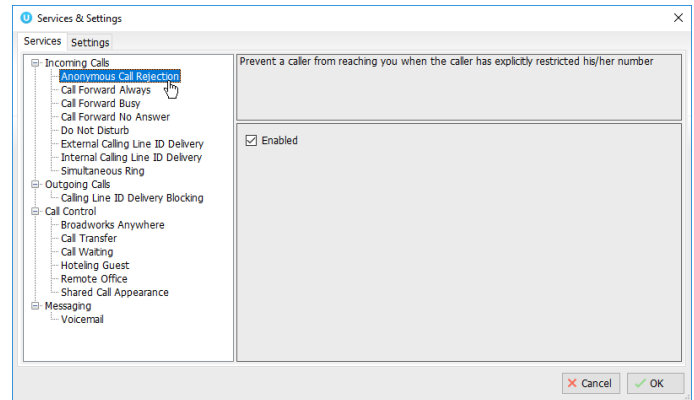
This service setting section allows users to enable and setup the BroadWorks features the user wishes to use for Incoming Calls while working in Unity.

ANONYMOUS CALL REJECTION

Settings > Services > Incoming Calls > Anonymous Call Rejection

Disallow calls from callers who have setup usage of a ‘private’, ‘anonymous’ or ‘unknown’ caller ID. This is an On/Off service.

1. Click to **Enable**.
2. Click **OK** and select **Yes** to restart and update the system when prompted.

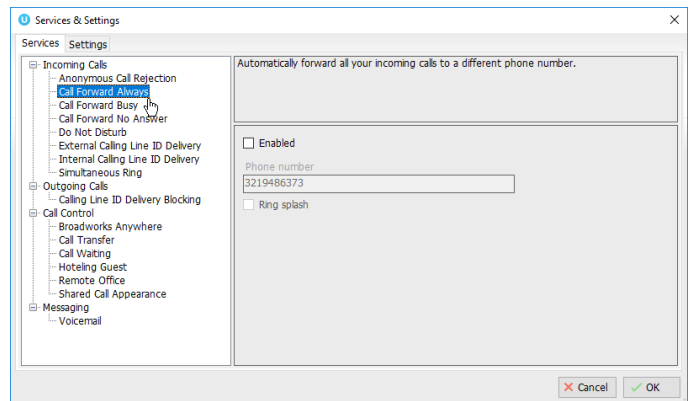


CALL FORWARD ALWAYS

Settings > Services > Incoming Calls > Call Forward Always

Automatically forward all incoming calls to a different phone number.

1. **Enabled** – Click to place a checkmark if you wish to use Call Forward Always.
2. **Phone Number** – Enter a 10-digit phone number, no spaces/special characters.
3. **Ring Splash** – Enable, as needed to ring the deskphone and forwarding number.
4. Click **OK** and select **Yes** to restart and update the system when prompted.

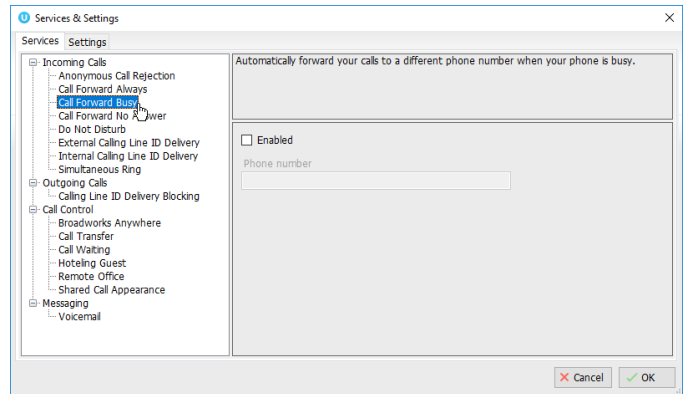


CALL FORWARD BUSY


 **Settings > Services > Incoming Calls > Call Forward Busy**

Automatically forward calls to a different phone number when your line is busy. User may enable and define the phone number for forwarding.

1. **Enabled** – Click to place a checkmark if you wish to use Call Forward Busy.
2. **Phone Number** – Enter a 10-digit phone number, no spaces/special characters.
3. Click **OK** and select **Yes** to restart and update the system when prompted.

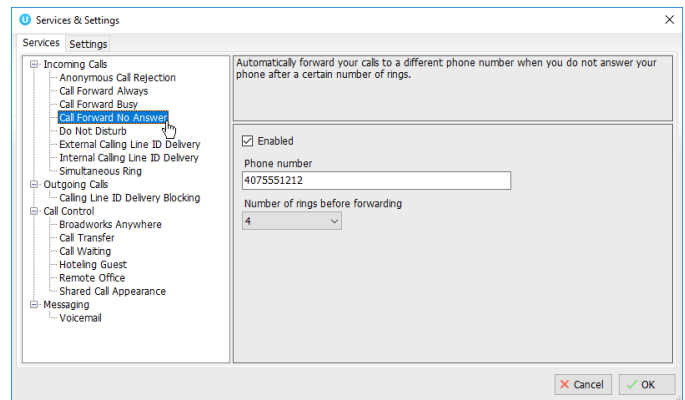


CALL FORWARD NO ANSWER


 **Settings > Services > Incoming Calls > Call Forward No Answer**

Automatically forward incoming calls to a different phone number if the call is unanswered for a set number of rings. User may enable, define the phone number and the number or rings before forwarding.

1. **Enabled** – Click to place a checkmark if you wish to use Call Forward No Answer.
2. **Phone Number** – Enter a 10-digit phone number, no spaces/special characters.
3. **Number of rings before forwarding** – Choose a number using the drop-down menu.
4. Click **OK** and select **Yes** to restart and update the system when prompted.



CONTACT CENTER

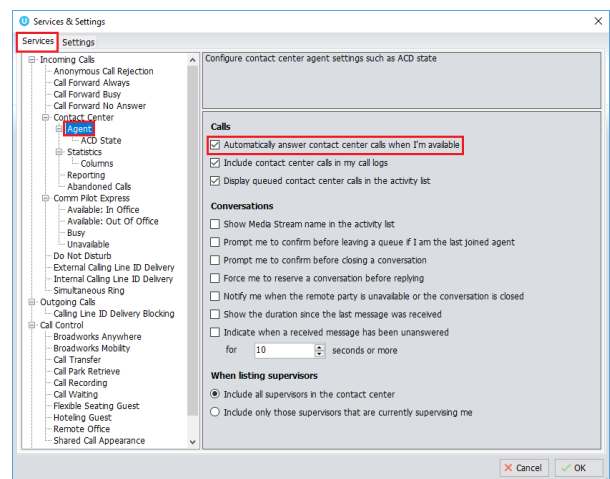
Go to  **Settings > Services > Incoming Calls > Contact Center** to manage the call and display settings for contact center Agents, ACD States, Personal Wallboard Statistics and Column displays, Reporting, and for assigning Abandoned Calls.

Agent

1. Define or select from the following Contact Center Agent settings:

Calls:

- Automatically answer contact center calls when I'm available**
- Include contact center calls in the Activity List**
- Display queued contact center calls in the Activity List**



Conversations:

- Show Media Stream in the Activity List
- Prompt me to confirm before leaving a queue if I am the last joined agent
- Prompt me to confirm before closing a conversation
- Force me to reserve a conversation before replying
- Notify me when the remote party is unavailable or the conversation is closed
- Show the duration since the last message was received
- Indicate when a received message has been unanswered for X seconds or more

When listing Supervisors:

- Include all supervisors in the contact center (default)
 - Include only those supervisors that are currently supervising me
2. Click OK to submit the change(s) and select **Yes** to restart Unity when prompted.

ACD STATE

Go to  **Settings** > **Services** > **Incoming Calls** > **Contact Center** > **Agent** > **ACD State**

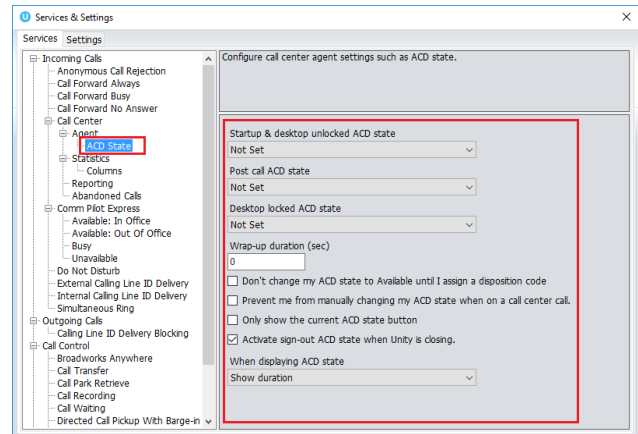
1. Enable or select from the following automation and display settings for ACD state:

Startup & Desktop Unlocked ACD State – select an option from the drop-down list or leave as **Not Set**.

Post Call ACD State – select an option from the drop-down list, or leave as **Not Set**.

Desktop locked state – select an option from the drop-down list, or leave as **Not Set**.

Wrap-up duration (sec) – enter an amount of time in seconds to complete Wrap Up tasks before automatically using the following selected setting(s)



- Don't change my ACD state to Available until I assign a disposition code
- Prevent me from manually changing my ACD state when on a call center call
- Only show the current ACD State button
- Activate sign-out ACD state when Unity is closing (useful for ensuring users automatically leave Contact Center upon exiting Unity)

When displaying ACD State... select an option from the drop-down list or leave as **Show duration**.

2. Click OK to submit the change(s) and select **Yes** to restart Unity when prompted.

Supervisor

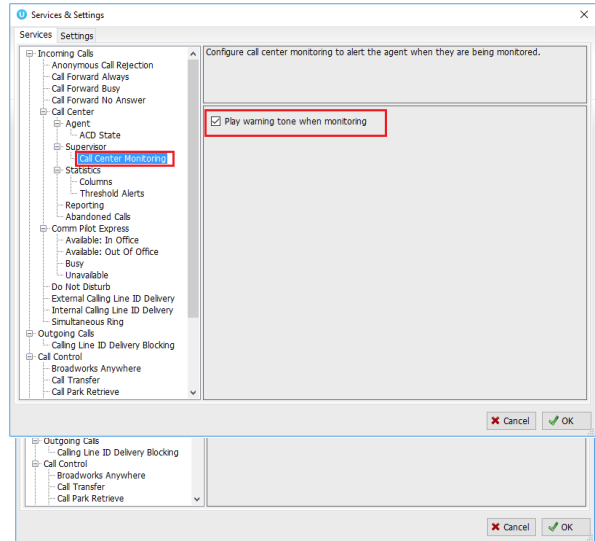
Go to **Settings > Services > Incoming Calls > Contact Center > Supervisor** to manage call center supervisory settings, including the list of monitored agents you wish to view, and individual alerts when queue thresholds are reached.

1. Define or select from the following:

- Automatically add all agents to my supervised agent list** – Enable to let Unity display all assigned agents, disable to define your own list of agents to monitor.
- Show queued calls in my current call list** – Enable to display individual call queues, based on the current list.
- Only include my supervised agents in the staffed ratio** – Enable to limit the staffed ratio to your monitored agents.

Agent activity image based on – Select the preferred agent availability icon option display from the drop-down menu list.

2. Click **OK** to submit the change(s) and select **Yes** to restart Unity when prompted.



CALL CENTER MONITORING

Settings > Services > Incoming Calls > Contact Center > Supervisor > Call Center Monitoring and elect whether to allow Agents to receive an alert tone when you are monitoring them.

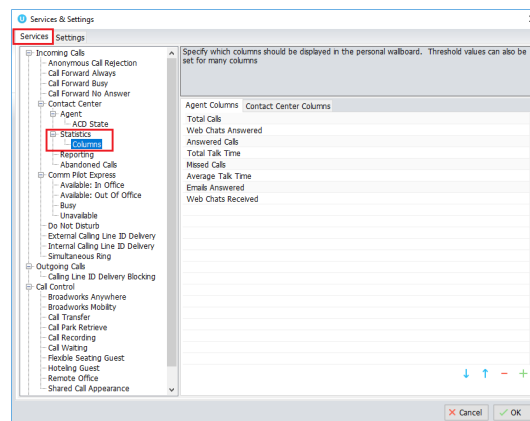
1. Enable/disable the following:

- Play warning tone when monitoring** – Click to place a checkmark in the box to enable.

2. Click **OK** to submit the change and select **Yes** to restart Unity when prompted.

Statistics

Go to: **Settings > Services > Incoming Calls > Contact Center > Statistics** to manage the display of statistics shown in the *My Statistics* and *Overall Queue Statistics* panels of the Personal Wallboard.



COLUMNS

Go to: **Settings > Services > Incoming Calls > Contact Center > Statistics > Columns** to specify the columns to be displayed for agents and contact centers, their order, and the threshold values for each.

- + Add
- Remove
- ↑↓ Reorder

In the Agent Columns and Contact Center Columns tabs:

1. Double-click on a Statistic listing to define the following:

Column Heading – Enter a new name for the column display, as desired.


Set threshold alert values (for all or for each Contact Center listed) – Click to place a checkmark in the box to enable editing of the threshold values for the statistics

Highlight non-zero values – Click to place a checkmark in the box to instruct Unity to show any value over 0 in red.

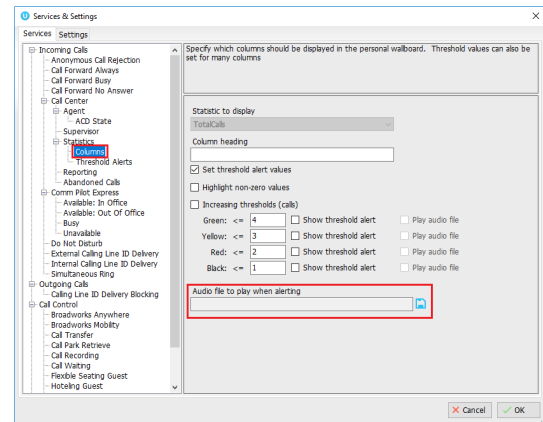
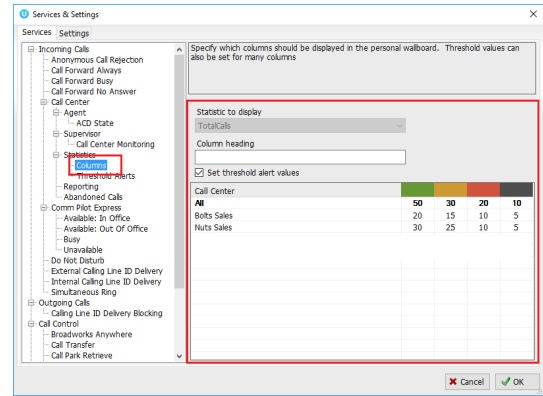
Increasing Thresholds (calls) – Click to place a checkmark in the box to enable and then define the less than / equal to call amounts for the color thresholds.

Show Threshold alert – click to place a checkmark in the box to enable.

Play audio file – click to place a checkmark in the box to enable.

Audio file to play when alerting – Click the  file icon to select an audio file to upload.


2. Click **OK** to submit the change(s) and select **Yes** to restart Unity when prompted.



THRESHOLD ALERTS

Go to: **Settings > Services > Incoming Calls > Contact Center > Statistics > Columns > Threshold Alerts** to define *how* Unity displays call center threshold alerts along with the audio notification options.

1. Specify/Enable the following as needed:

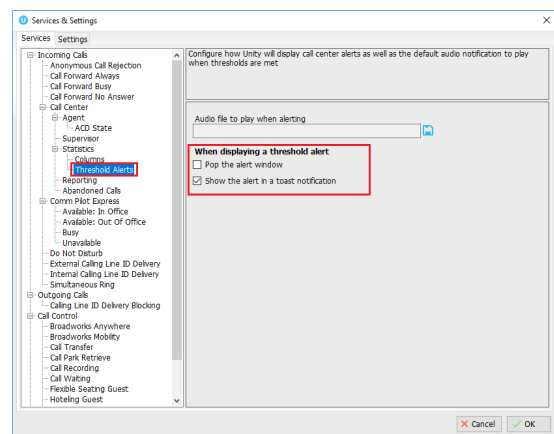
Audio file to play when alerting (only allowed if visual alerts are enabled in Columns) – Click the  file icon to upload an audio file.

When displaying a threshold alert

Pop the alert window (default)

Show the alert in a toast notification – Enable as desired.

2. Click **OK** to submit the change(s) and select **Yes** to restart Unity when prompted.



Reporting

Settings > Services > Incoming Calls > Contact Center > Reporting

Manage the preferred display formats to be used in call center reports, and the timeout threshold.

1. Select options for the following:

Date Format – Select the preferred date format.

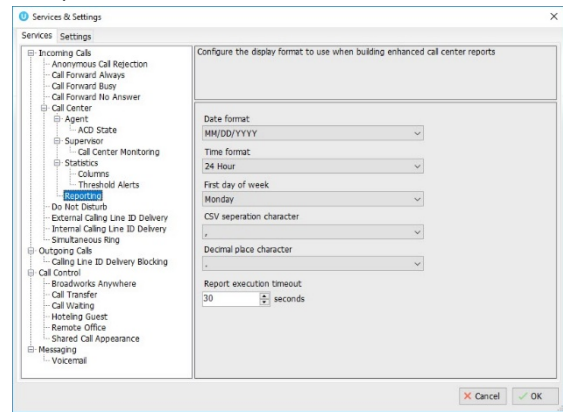
Time Format – Select 24hr or AM/PM

First day of week – Select the weekday from the list

CSV separation character – Default is comma.

Decimal place character – Default is decimal.

Report execution timeout – choose the number of seconds.



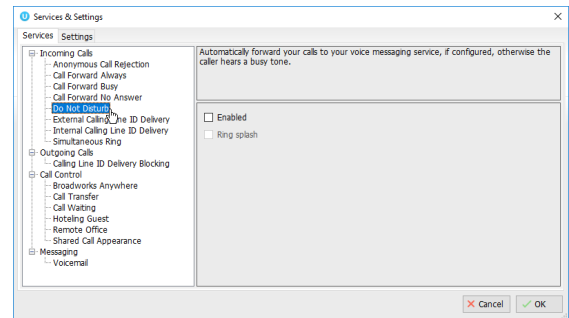
2. Click **OK** and select **Yes** to restart and update the system when prompted.

DO NOT DISTURB

Settings > Services > Incoming Calls > Do Not Disturb

Define how the system will handle calls when Do Not Disturb (DND status) is in effect.

- Enabled** – Click to place a checkmark if you wish the system to automatically forward calls to voicemail DND is in effect. *Otherwise the caller hears a busy signal.*
- Ring Splash** – Enable, as needed to ring alternate numbers.
- Click **OK** and select **Yes** to restart and update the system when prompted.

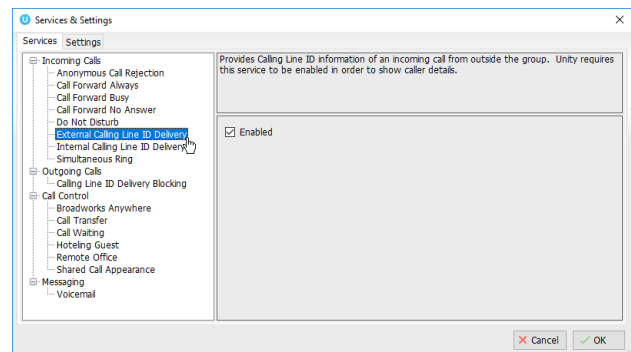


EXTERNAL CALLING LINE ID DELIVERY

Settings > Services > Incoming Calls > External Calling Line ID Delivery

Required to be enabled to see caller ID information for incoming calls that originate outside the enterprise group. This is an On/Off service.

- Enabled** - Click to place a checkmark in the box to use this service.
- Click **OK** and select **Yes** to restart and update the system when prompted.

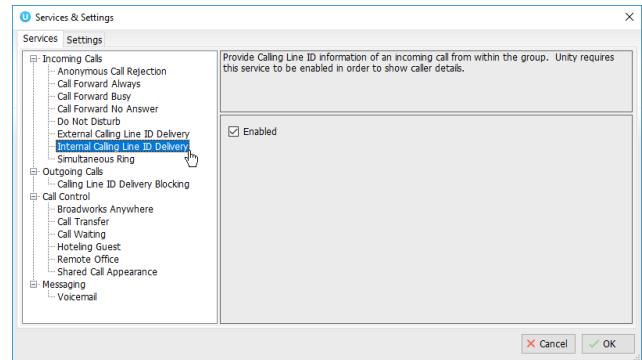


INTERNAL CALLING LINE ID DELIVERY

Settings > Services > Incoming Calls > Internal Calling Line ID Delivery

Required to be enabled to see caller ID details for internal callers. This is an On/Off service.

1. **Enabled** – Click to place a checkmark in the box to use this service.
2. Click **OK** and select **Yes** to restart and update the system when prompted.



SIMULTANEOUS RING

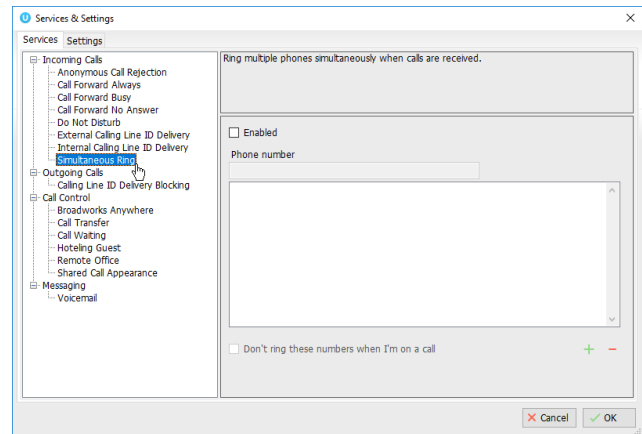
Settings > Services > Incoming Calls > Simultaneous Ring

Ring multiple phones simultaneously when calls are received. Enable, enter one or more telephone numbers to ring simultaneously, and choose whether or not to ring numbers that are busy.

1. **Enabled** - Click to place a checkmark in the box to use this service.
2. **Phone Number** - Enter a 10digit phone number, no spaces/special characters.
3. Click on the **+** Plus sign to add the number to the list box below.

Click to highlight a number in the list and press the **-** Minus sign to remove the selected item.

4. Repeat as needed to add more numbers to ring simultaneously.
5. **Don't ring these numbers when I'm on a call** – Optional: Instructs the system NOT to ring the entered numbers when your main line is busy.
6. Click **OK** and select **Yes** to restart and update the system when prompted.



OUTGOING CALLS

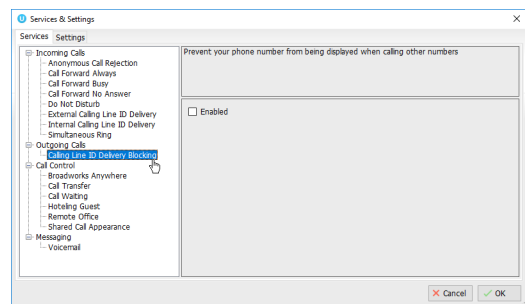
Define the outgoing Caller ID behavior for outgoing calls.

CALLING LINE ID DELIVERY BLOCKING

Settings > Services > Outgoing Calls > Calling Line ID Delivery Blocking

Prevents your phone number from being displayed to recipients of outgoing calls.

1. **Enabled** - Click to place a checkmark in the box to use this service.
2. Click **OK** and select **Yes** to restart and update the system when prompted.



CALL CONTROL

Settings > Services > Call Control

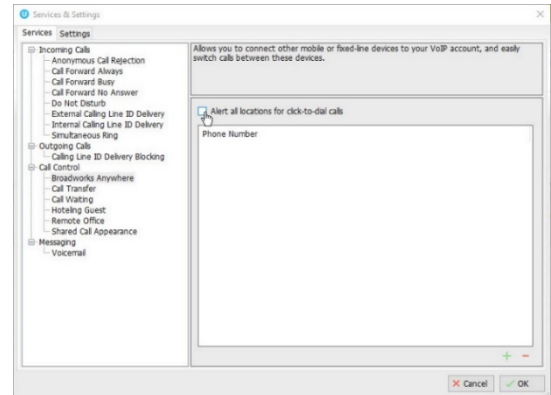
Define the behavior of call controls / BroadWorks services.

BROADWORKS ANYWHERE

Settings > Services > Call Control > Broadworks Anywhere

Add some additional mobile or fixed-line devices to the VoIP account, and switch between the devices while on a call.

1. **Alert all locations for click-to-dial** – Click to place a checkmark to enable this service.
2. Click the **+** Plus sign to add a 10-digit phone number, no spaces or special characters.
3. Select a phone number in the list and click the **-** Minus sign to remove the selected item.
4. Repeat to add or remove more phone numbers, as needed.
5. Click **✓OK** and select **Yes** to restart and update the system when prompted.



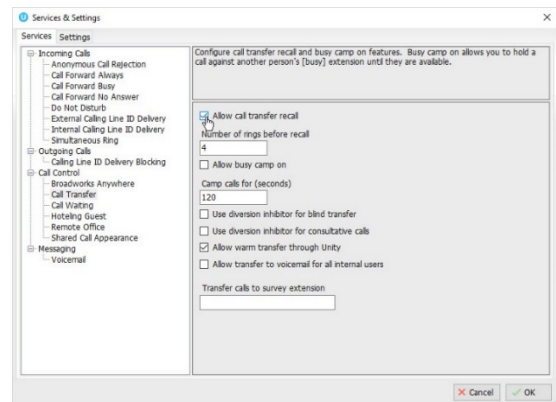
CALL TRANSFER

Settings > Services > Call Control > Call Transfer

Configure call transfers, call recall, and Busy Camp on Features. Busy Camp On allows users to transfer a call to another person's [busy] extension on hold until they are available, and then the call is connected to that line.

1. Select and define the following settings, as needed:
 - Allow call transfer recall** – Enable to have calls sent back to your line if unanswered.

Number of rings before recall – Specify a number of rings to allow on the busy line before the transferred call is recalled to your line.
 - Allow busy camp on** – Click to place a checkmark to enable this feature and allow held call transfers to a busy line (caller stays on hold until answered).
 - Camp calls for (seconds)** – Set a number of seconds to camp held calls on a busy line.
 - Use diversion inhibitor for blind transfer** – Click to place a checkmark to keep another person's settings from diverting your blind transferred calls.
 - Use diversion inhibitor for your consultative transferred calls** – Click to place a checkmark to enable this service.
 - Allow warm transfer through Unity** – Click to place a checkmark to enable this service.
 - Allow transfer to voicemail for all internal users** – Click to place a checkmark to enable this service.



- Allow transfer to voicemail for all internal users – Click to place a checkmark to enable.
 - Transfer calls to survey extension – Optional For Surveys. Enter a telephone number or extension to send transferred calls to a survey line.
2. Click **OK** and select **Yes** to restart and update the system when prompted.

CALL WAITING

Settings > Services > Call Control > Call Waiting

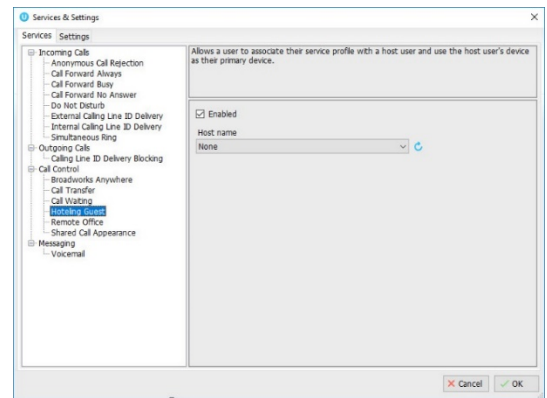
On/Off service setting. Click to place a checkmark next to **Enabled** to use the Call Waiting service which allows a user to continue to receive and elect to answer new calls when the line is currently in use (busy).

HOTELING GUEST

Settings > Services > Call Control > Hoteling Guest

Allows a user to associate their service profile with a Hoteling Host user’s device and use that phone as their primary device for a period of time.

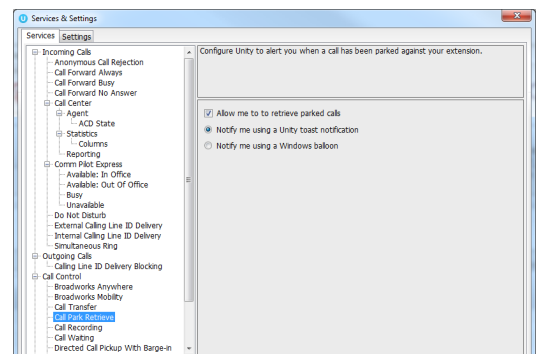
1. **Enabled** – Click to place a checkmark to enable this service.
2. **Host Name:** Select an available Host User from the drop-down list to use that device as your primary for the length of time the host has allowed.
3. Click **OK** and select **Yes** to restart and update the system when prompted.



CALL PARK RETRIEVE

Settings > Services > Call Control > Call Park Retrieve

1. Choose the following options to manage call park alert setting.
 - Allow me to retrieve parked calls – Click to place a checkmark in the box to be able to get calls parked on your line.
2. Choose a notification option:
 - Notify me using a Unity toast notification
 - Notify me using a Windows balloon
3. Click **OK** and select **Yes** to restart and update the system when prompted.



REMOTE OFFICE

Settings > Services > Call Control > Remote Office

Unity can be configured to automatically activate and deactivate Remote Office on start-up and shutdown and to use the [My Status](#) link to quickly activate/deactivate the service. If Remote Office is enabled, but Unity is not configured to automatically deactivate Remote Office when closing, a prompt will be presented to the user requesting confirmation of deactivation at sign out.

1. Select and define the following setting options, as needed:

Enabled – Remote Office can be used and setup.

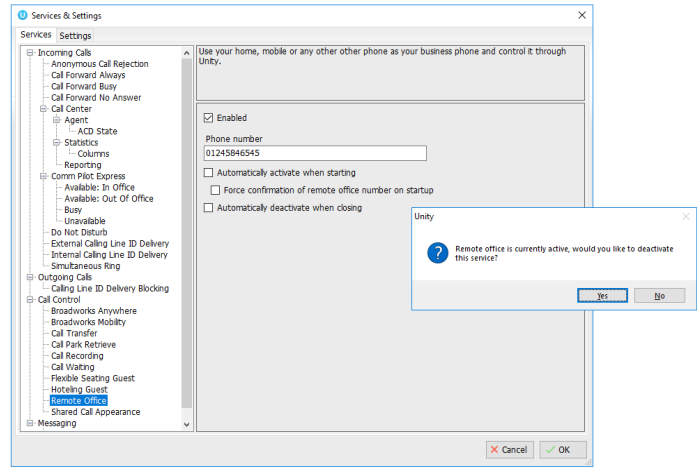
Phone Number – Enter the alternate 10-digit phone number to use for remote office (no spaces/special characters).

Automatically activate when starting – When enabled, remote office will be in use for the session.

Force confirmation of remote office number on startup – When enabled, the user must select Yes for remote office usage or select no to deactivate for the session.

Automatically deactivate when closing – When enabled, Unity will automatically turn off remote office when the application is closed.

2. Click **OK** and select **Yes** to restart and update the system when prompted.



SHARED CALL APPEARANCE

Settings > Services > Call Control > Shared Call Appearance

Manage all phones that are pre-assigned to your user account.

1. Select and define the following setting options, as needed:

Alert all appearances for click-to-dial calls – Click to place a checkmark in the box to enable this service option.

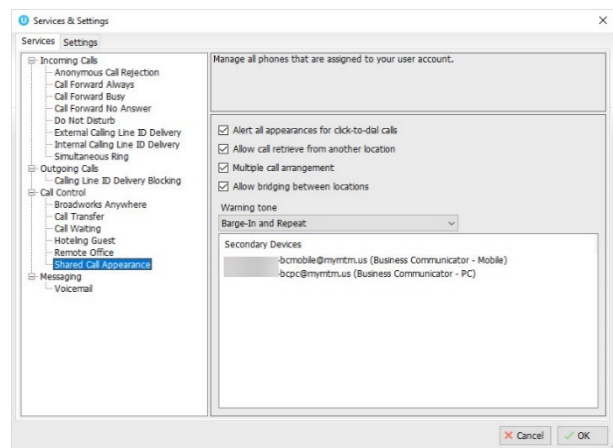
Allow call retrieve from another location – Click to place a checkmark in the box to enable this service.

Multiple call arrangement – Click to place a checkmark in the box to enable this service option.


Allow bridging between locations – Click to place a checkmark in the box to enable this service.

Warning tone: Select a warning option from the drop-down list (None, Barge In, Barge In and Repeat)

2. Click **OK** and select **Yes** to restart and update the system when prompted.



MESSAGING

Go to  **Settings > Services > Messaging** to manage voicemail messaging behaviors.

VOICEMAIL

Settings > Services > Messaging > Voicemail

Configure your personal voice messaging behaviors.

1. Select and define the following, as needed to setup voicemail:

Enabled – Click to place a checkmark in the box to enable voicemail.

Use unified messaging – Click to enable unified messaging and select from the following:

Use phone message waiting indicator – Click to enable the voicemail message waiting icon.

Show visual voicemail tab – click to enable and have access to the voicemail tab in Unity.

Forward the voicemail via email – Click to enable and enter one or more comma separated email addresses to receive voicemail .wav files.

Email notification of new voicemails – Click to enable and enter an email address to receive voicemail notifications via email.


Email a copy of the voicemail – Click to enable and enter an email address to receive a copy of the .wav file via email.

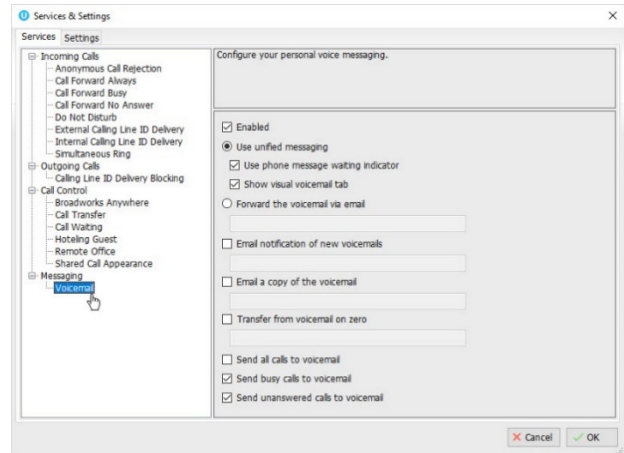
Transfer from voicemail on zero – Click to enable a caller to transfer to your voicemail by pressing 0.

Send all calls to voicemail – Click to enable and send all incoming calls to voicemail automatically.

Send busy calls to voicemail – Click to enable and send calls to voicemail when the line is busy.

Send unanswered calls to voicemail – Click to enable and send incoming calls to voicemail when unanswered.

2. Click  **OK** and select **Yes** to restart and update the system when prompted.



9. MANAGE BASIC SETTINGS

The settings in Unity are pre-defined during implementation. Users may have access to modify some settings in Unity to assist as they work. This section describes the most common settings available and offers tips or instructions for working with them.

APPEARANCE SETTINGS

Settings > Settings tab > Appearance

Manage the Unity display on the desktop and how calls, contacts and searches display.

1. Enable / select the following settings, as needed:

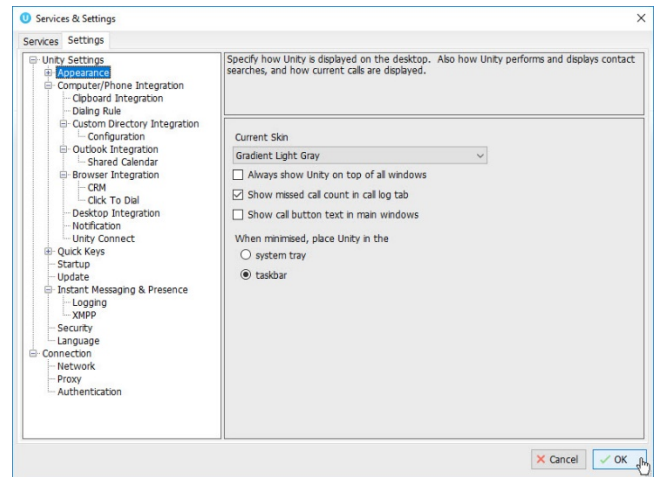
Current Skin: Select an option from the drop-down menu options to choose a different color/text combination for the Unity application display.

Always show Unity on top of all windows – Click to place a check in the box to enable this setting.

Show missed call count in call log tab – Click to place a check in the box to enable the display of missed calls in the call logs tab.

Show call button text in main windows – Click to place a check in the box to display the call control icon descriptions.

When minimized, place unity in the: System tray or taskbar



2. Click **OK** and select **Yes** to restart and update the system when prompted.

CONTACT SEARCH

Settings > Settings tab > Appearance > Contact Search

Manage the way Unity performs contact searches and the display of search results.

1. Enable and/or select from the following setting options, as needed:

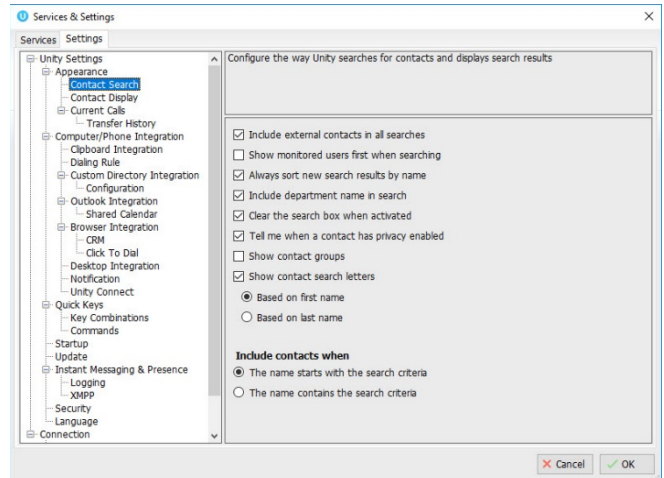
Include external contacts in all searches – Enable to view any available CRM or Outlook contacts in searches.

Show monitored users first when searching – Enable to automatically display monitored users first.

Always sort new search results by name – Enable to sort alphanumerically by name.

Include department name in search – Enable to search by department.

Clear the search box when activated – Enable to auto-clear the search box when finished.



- Tell me when a contact has privacy enabled – Enable to include privacy indicators in the search results.
 - Show contact groups – Enable to include contact groups in search results.
 - Show contact search letters: Based on first name or Based on last name.
- Include contacts when: the name starts with the search criteria or the name contains the search criteria.

2. Click **OK** and select **Yes** to restart and update the system when prompted.

CONTACT DISPLAY

Settings > Settings tab > Appearance > Contact Display

Manage the way Unity displays contacts and the menu options to display when the drag and drop feature is used from Contacts.

1. Enable / select from the following contact display setting options:

- Show call duration in contact list – Enable to include call duration times in the display.
- Always show call details – Enable to include call details in the display.

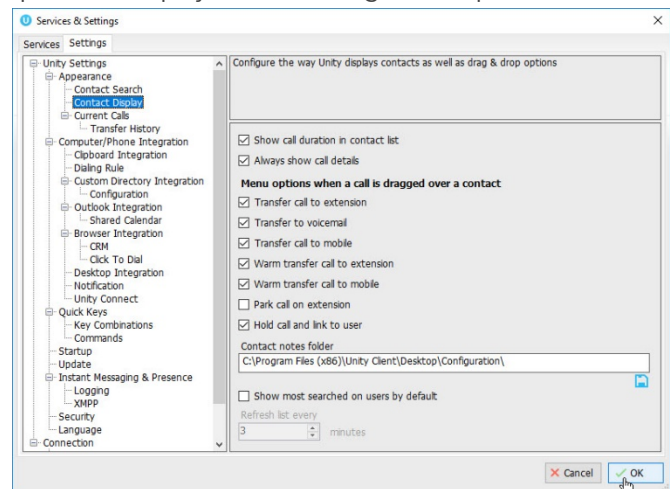
Menu options when a call is dragged over a contact: Choose the options you want to access in the right-click context menu when drag and dropping a call onto a contact:

- Transfer call to extension
- Transfer to voicemail
- Transfer call to mobile
- Warm Transfer call to extension
- Warm transfer call to mobile
- Park Call on Extension
- Hold call and link to user

Contact Notes Folder: Click the file  icon to browse to and select a new folder

- Show Most searched on users by default – Enable to include your most searched results by default.
- Refresh list every x minutes – select the refresh rate using the selection tool.

2. Click **OK** and select **Yes** to restart and update the system when prompted.



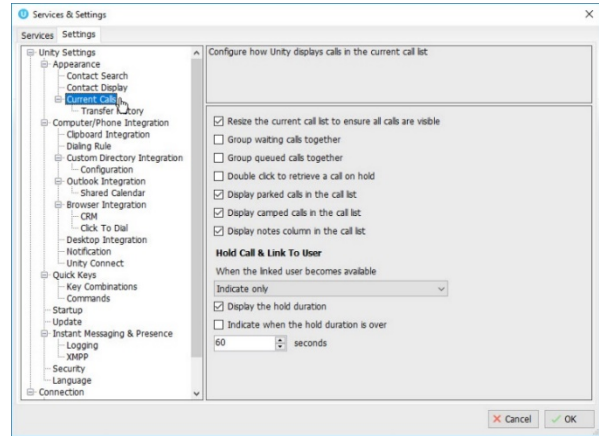
CURRENT CALLS

 **Settings > Settings tab > Appearance > Current Calls**

Configure the Unity Current Call list information and display.

1. Enable or specify the following current call list setting options, as needed:


- Resize the current call list to ensure all calls are visible**
- Group waiting calls together**
- Group queued calls together**
- Double click to retrieve a call on hold**
- Display parked calls in the call list**
- Display camped calls in the call list**
- Display notes column in the call list**



Hold Call & Link To User – If Hold & Link to User is in use, choose from the following actions and display options when performing this action:

When the linked user becomes available: Select from the available action options using the drop-down list. *Indicate Only* is the default.

- Display the hold duration**
- Indicate when the hold duration is over** – Use the selection tool to choose the number of seconds to allow the call to remain on hold before receiving a notification alert.

2. Click  **OK** and select **Yes** to restart and update the system when prompted.

Transfer History

 **Settings > Settings tab > Appearance > Current Calls > Transfer History**


Manage the way Unity displays and saves transfer history information.

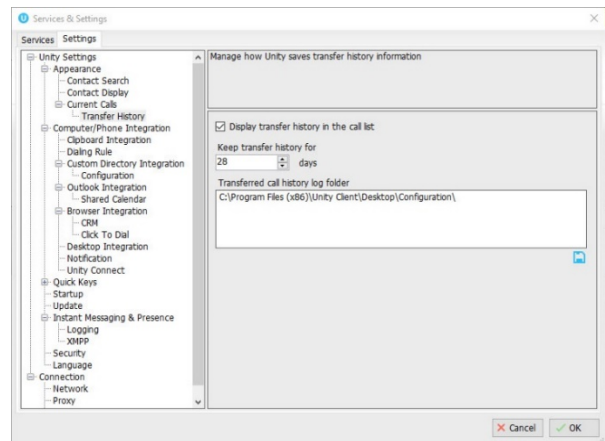
1. Enable or select from the following setting options:


- Display transfer history in the call list** – Click to enable/disable.

Keep transfer history for x days: Choose the number of days using the selection tool. The default is 28 days.

To View logs: Click on the log folder listing in the box to go to the file location.

To choose a new log folder: Click on the  icon to browse to and select a different local folder location for the transfer history logs.



2. Click  **OK** and select **Yes** to restart and update the system when prompted.

COMPUTER/PHONE INTEGRATION SETTINGS

Settings > Settings tab > Computer/Phone Integration

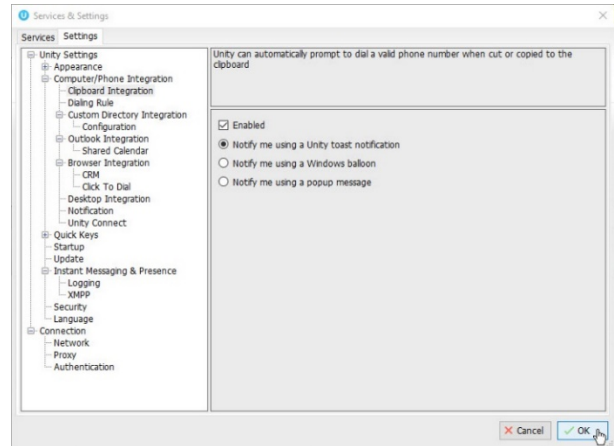
This section allows users to define the way Unity integrates with the computer, other applications, and the phone.

CLIPBOARD INTEGRATION

Settings > Settings tab > Computer/Phone Integration > Clipboard Integration

Manage how Unity integrates with the system clipboard to allow auto-dial when a valid phone number is cut or copied into the clipboard.

- Select from the following:
 - Enabled** – Click to place a checkmark in the box to use this feature or remove the checkmark to disable.
- Choose from the following notification methods:
 - Notify me using a Unity toast notification
 - Notify me using a Windows balloon
 - Notify me using a popup message.
- Click **OK** and select **Yes** to restart and update the system when prompted.



DIALING RULE

Settings > Settings tab > Computer/Phone Integration > Dialing Rule

Define custom rules for how Unity behaves when using click-to-dial or contact popping for incoming calls, including how specially formatted numbers are dialed, and manage how Unity uses the diversion inhibitor for outgoing calls/transfers.

- Define and select from the following rule options:

Note: Contact your Unity Administrator for rule assistance.

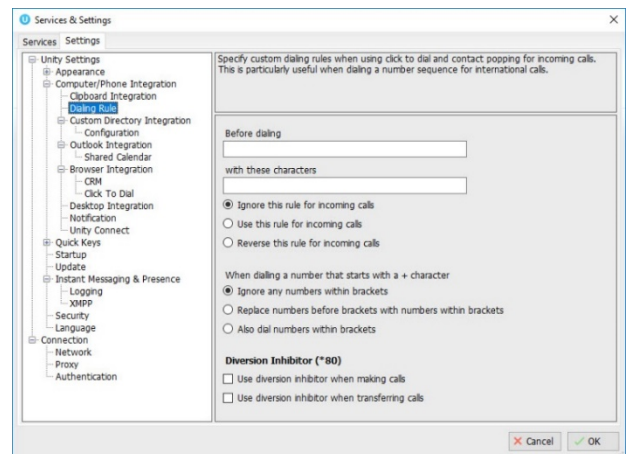
Before dialing: Define the rule to be used prior to dialing from Unity.

With these characters: Enter specific characters to insert during click-to-dial or for incoming calls.

- Ignore this rule for incoming calls
- Use the rule for incoming calls
- Reverse this rule for incoming calls

When dialing a number that starts with a + character (useful for international calls) - Choose a rule option below:

- Ignore any numbers within brackets



- ⦿ Replace numbers before brackets with numbers within brackets
- ⦿ Also dial numbers within brackets

Diversion Inhibitor (*80) – Click to place a checkmark next to the desired setting options below:

- Use diversion inhibitor when making calls – select to override the recipient’s settings and have these calls returned to you.
- Use diversion inhibitor when transferring calls – select to override the recipient’s settings and have these calls returned to you.

2. Click **OK** and select **Yes** to restart and update the system when prompted.

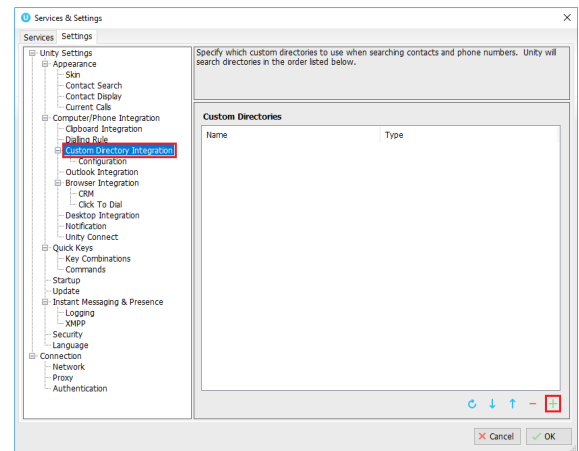
CUSTOM DIRECTORY INTEGRATION

Settings > Settings tab > Computer/Phone Integration > Custom Directory Integration

Unity includes a wizard to connect to third party SQL or LDAP directories and upload them into your Unity directory. Users may have access to add, edit and remove custom directories. Contact your Unity Administrator for assistance with importing directories.

1. Select an action to perform:

- **Add:** Click the **+** Add icon to open the wizard and follow instructions to add a connection to a custom directory.
- **Edit:** Double-click on a directory listing to modify the information, as needed.
- **Remove:** Click on a directory listing to select it and click the **-** Delete icon to remove it.
- **Set Order:** Select a directory listing and use the **↑** up and **↓** down arrows to modify the search order.
- **Refresh:** Click on the **↻** Refresh icon to update the list.



2. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.

Configuration

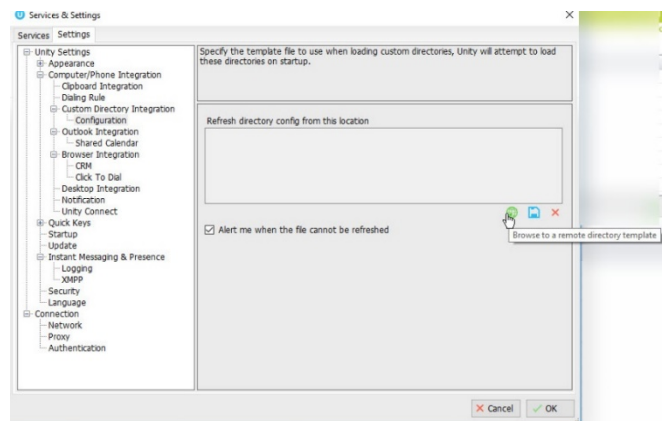
Settings > Settings tab > Computer/Phone Integration > Custom Directory Integration > Configuration

Specify and manage the template file to use when loading custom directories.

1. Choose an action/setting option and follow the prompts to:

Add – Choose **Browse to a remote directory template** or **Add a local directory template** and follow the steps to locate and upload the file.

Remove – Click on the listing and click the **X** icon to remove a template file.



- Alert me when the file cannot be refreshed – Click to place a checkmark in the box to enable alerts.
2. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.

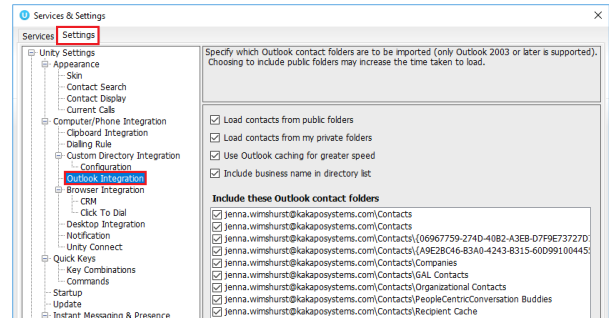
OUTLOOK INTEGRATION

Settings > Settings tab > Computer/Phone Integration > Outlook Integration

Users may specify which contact folders to import and manage those available for review/search in your Contacts. Users can import both public and private folders. Expect longer load times when selecting public folders to import.

1. Click to place checks next to the following Outlook options to enable:

- Load contacts from public folders
- Load contacts from my private folders
- Use Outlook caching for greater speed
- Include business name in directory list



2. Include these Outlook contact folders – Click to place checkmarks next to any folders in the list to include them in your contacts/searches.

Refresh – Click the icon to update the list to the latest.

3. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.

Shared Calendar

Settings > Settings tab > Computer/Phone Integration > Outlook Integration

Configure how Unity displays Outlook shared calendar details.

1. Enable and specify the following time and setting options:

Enabled – Click to place a checkmark in the box to enable.

Start Hour (24hr time format so 9am = 9 and 3pm = 15)
– Choose the start time Unity is allowed to display shared calendar details using the selection tool.

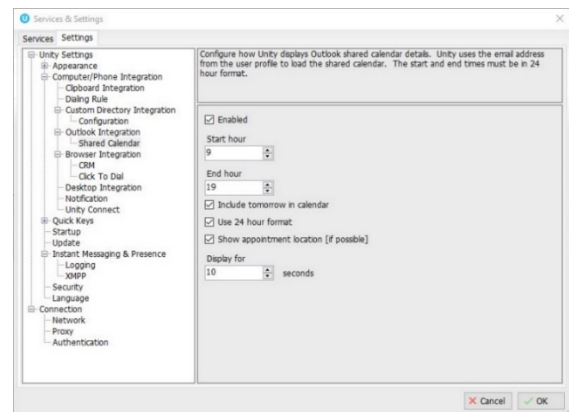
End Hour – Choose the end time Unity is allowed to display shared calendar details using the selection tool.

Include tomorrow in calendar – Click to enable/disable

Use 24hour format – Click to enable 24hour format display times in Unity.

Show appointment location (if possible) – Click to place a check next to this setting option to enable.

Display for X seconds – Choose the number of seconds to display using the selection tool.



2. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.

BROWSER INTEGRATION

Settings > Settings tab > Computer/Phone Integration > Browser Integration

Configure Unity to browse to a URL in the default browser for inbound or outbound calls. Use the (contactNumber)[Direction][LocalCallID] and [LoginID] placeholders which Unity will replace with the Call details, or contact your administrator for assistance.

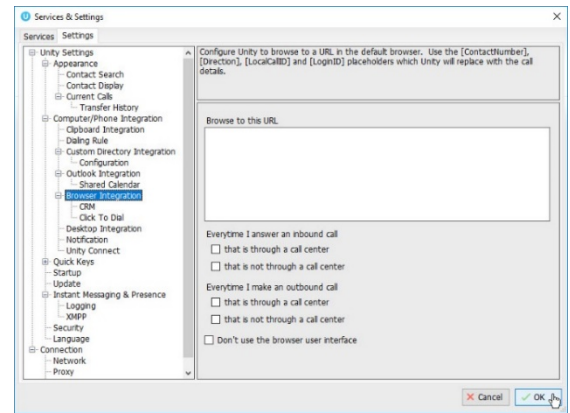
1. Complete and select from the following to use Browser Integration:
Browse to this URL - Enter the URL to be used following the format displayed above in the description.
2. Select from the following rule options for using the URL defined above:

Everytime I answer an Inbound Call

- That is through a call center
- That is not through a call center

Everytime I make an outbound call

- That is through call center
- That is not through a call center
- Don't use the browser user interface



3. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.

CRM

Settings > Settings tab > Computer/Phone Integration > Browser Integration > CRM

Configure Unity to integrate with a CRM for contact search and calling line information display.

Configuration Tab

1. Define the following settings and feature options for CRM integration:

CRM Platform: Choose your CRM platform.

Login ID: Enter your CRM login ID

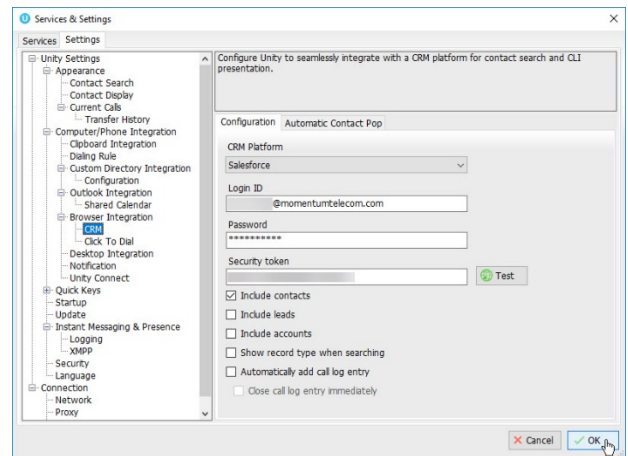
Password: Enter your CRM password.

Security Token: Enter your CRM Security Token (find/update in your CRM profile).

2. **Test** – Click the button to ensure the CRM account can be accessed.

3. Enable the following desired integration options:

- Include contacts
- Include leads
- Include accounts
- Show record type when searching
- Automatically add call log entry and decide whether to...



- Close call log entry immediately
4. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.

Automatic Contact Pop Tab

1. Define the following CRM contact pop behavior setup options:

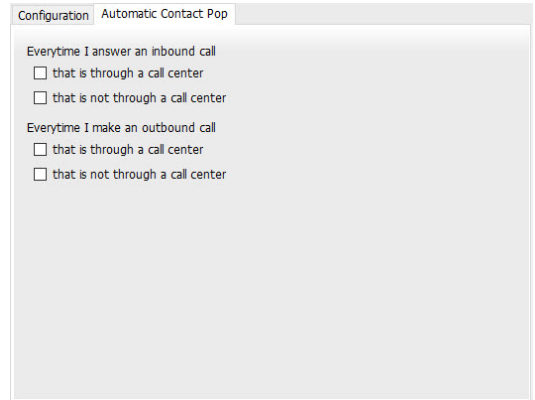
Everytime I answer an inbound call

- That is through a call center
- That is not through a call center

Everytime I make an outbound call

- That is through a call center
- That is not through a call center

2. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.



Click to Dial

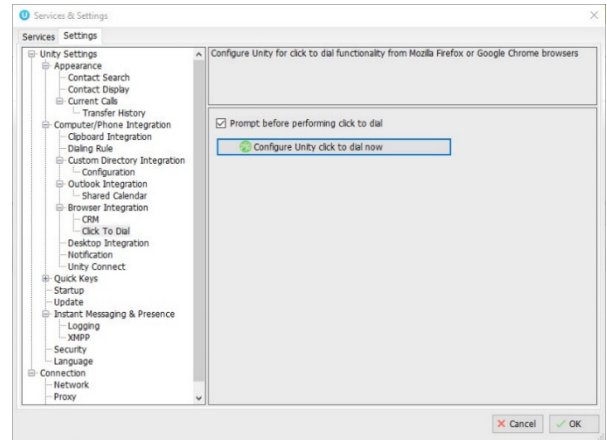
Settings > Settings tab > Computer/Phone Integration > Browser Integration > Click To Dial

Configure Unity to be the click to dial default application and whether to prompt before using.

1. Choose from the following click to dial options:
 - Prompt before performing click to dial.

Configure unity click to dial now – Click the button to set Unity as the default click to dial application.

2. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.

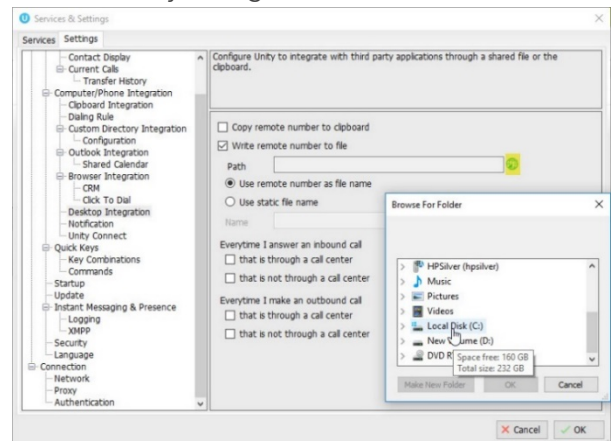



DESKTOP INTEGRATION

Settings > Settings tab > Computer/Phone Integration > Browser Integration > Desktop Integration

Configure remote number integrations with 3rd party applications and Unity through a shared file or the clipboard.

1. Select/enable the following features, define file paths/names, and calling rules, as needed:
 - Copy remote number to clipboard – Click to enable/disable
 - Write remote number to file – Click to enable and define the following:



Path: Enter the navigation path to a local file or click the  Browse icon and select the folder location using the selection tool.

- ⦿ **Use remote number's file name** – Click to select, or
- ⦿ **Use static file name** – Click to select and enter desired file Name in the field provided

2. Define the calling rules to use with the Desktop Integration settings defined above:

Everytime I answer an inbound call

- That is through a call center
- That is not through a call center

Everytime I make an outbound call

- That is through a call center
- That is not through a call center

3. Click **✓OK** and select **Yes** to restart and update the system with the changes when prompted.

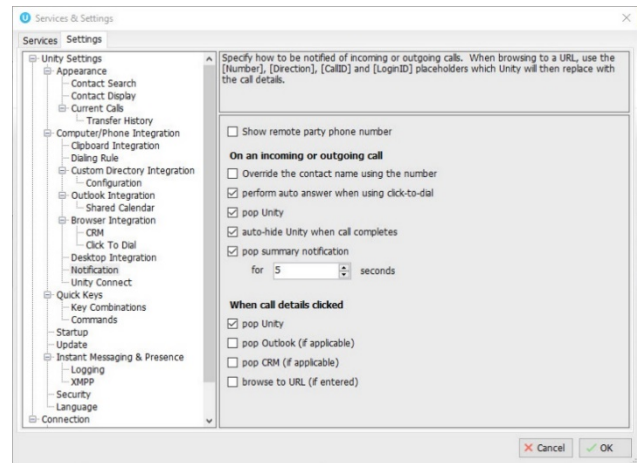
NOTIFICATION

 **Settings > Settings tab > Computer/Phone Integration > Notification**

Manage call details notification settings for incoming/outgoing calls. Note: When browsing to a URL, Unity will replace the format placeholders for [Number], [Direction], [CallID] and [LoginID] with call details.

1. Select and define the following setting options for incoming and outgoing call Notifications:

- Show remote party phone number** – Select to enable Unity to display this information in notifications.
- Override the contact name using the number** – Select if you prefer to show the number rather than the call ID information.
- Perform auto answer when using click to dial**
- Pop Unity**
- Auto-hide Unity when call completes**
- Pop summary notification** – select to enable AND choose the display length in seconds using the selection tool provided.



2. Define Unity the preferred behavior/display when a call details notification is clicked:

- Pop Unity** – Select to display Unity contact information
- Pop Outlook (if applicable)** – Select to enable the display of Outlook contact information if defined/setup/enabled in the [Outlook Integration](#) section.
- Pop CRM (if applicable)** – Select to enable the display of CRM contact information if defined/setup/enabled in the [CRM](#) section.
- Browse to URL (if entered)** – Select to enable Unity to display the URL defined in the [Browser Integration](#) section.

3. Click **✓OK** and select **Yes** to restart and update the system with the changes when prompted.

UNITY CONNECT

 **Settings > Settings tab > Computer/Phone Integration > Unity Connect**

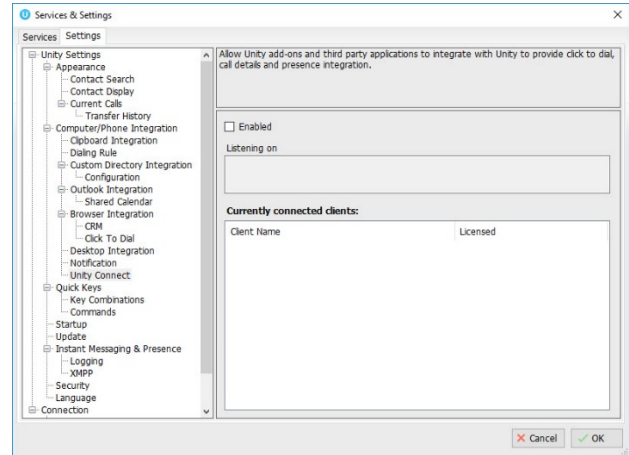
Defined in the Unity management portal. Users may be able to enable/disable this feature. Contact the Unity Administrator for assistance allowing Unity Add-ons and 3rd party application integrations with Unity to provide click to dial, call details, and presence information.

1. **Enabled** – Click within the checkbox to Enable/ Disable

Listening On – Read Only view of the port information.

Currently connected clients: Displays a list of the applications or add-ons that have been defined for usage.

2. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.



QUICK KEYS

 **Settings > Settings tab > Quick Keys**

The *Key Combinations* and *Commands* setting sections allow users to define shortcut keys and map them to commands that perform tasks like answering calls or dialing specific numbers.

Key Combinations

 **Settings > Settings tab > Quick Keys > Key Combinations**

This section allows users to choose the key combinations that will be setup in the Commands section.

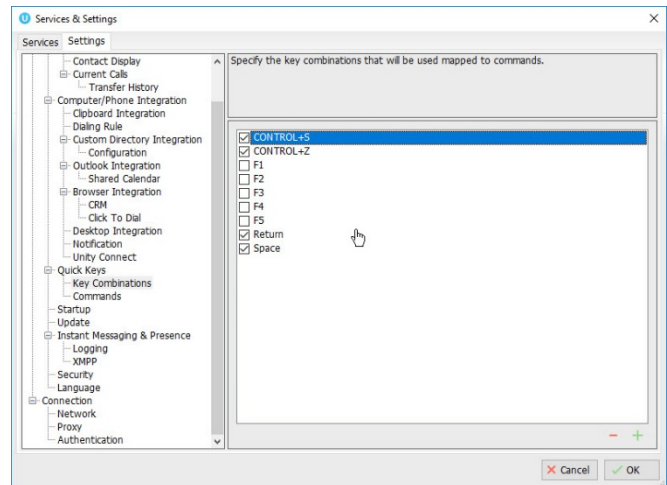
1. Complete the following actions, as needed to create or modify shortcut keys:

Select a Key Combination: Click within the checkbox next to a listed item to select it.

Add a Key Combination - Click on the **+** Plus sign and select the Modifier (Control, Shift, Alt or None) and the Keyboard key, then click OK to submit and return to the list to select it.

Delete – Click within a checkbox to select a combination in the list and press the **-** Minus sign. Then click Yes to delete the selected combination when prompted. **Use Caution.** Once a combination is deleted, the action cannot be undone and the user must recreate the combination and map the command once again if done in error.

2. Click **OK** and select **NO** to the restart when prompted to map the key combinations with commands.



Commands

Settings > Settings tab > Quick Keys > Commands

This setting section lists the current set of Key Commands and offers tools to Add, Edit and delete the commands used for selected Key combinations to create useful shortcuts for tasks.

EDIT COMMANDS

Double-click on a listed item to view the current setup, make changes as needed and click **✓OK** when finished.

ADD COMMANDS

1. Click on the **+** Plus sign to open the dialog that allows users to begin adding a new key and command combination.
2. Select options in the drop-down lists for the following fields. The drop-down list options update dynamically based on previous selections:

Key: Choose an available option from the list of key combinations.

List: Select the appropriate section of Unity in which the shortcut key will be used to perform an action.

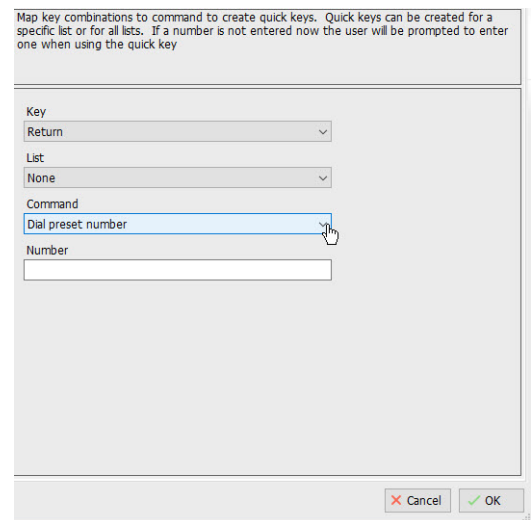
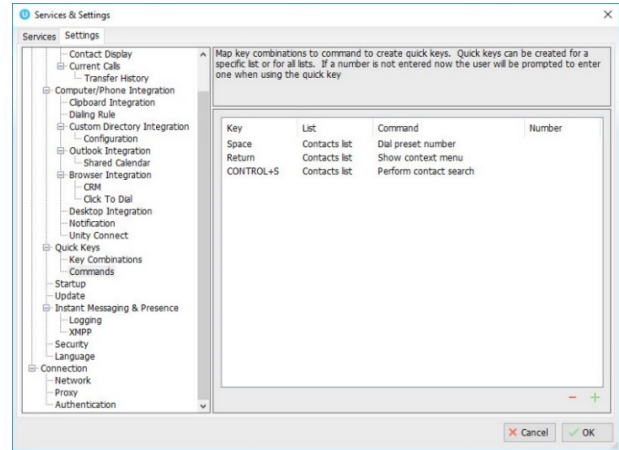
Command: Choose the action to be performed.

Number: This field becomes available to enter the phone number if *Dial Preset Number* is selected as a command.

3. Click **✓OK** to update the system with the new Quick Key command and return to the command list.
4. Click **✓OK** to submit all Command changes and select **Yes** to the restart when prompted.

DELETE COMMANDS

1. Click on a listing to highlight it, click on the **-** Minus icon, and choose **Yes** when prompted.
2. Click **✓OK** and select **Yes** to restart and update the system with the changes when prompted.



STARTUP

 **Settings > Settings tab > Startup**

Manage the options for automatic application startup and additional applications you may be licensed to use.


1. Select from the following options:

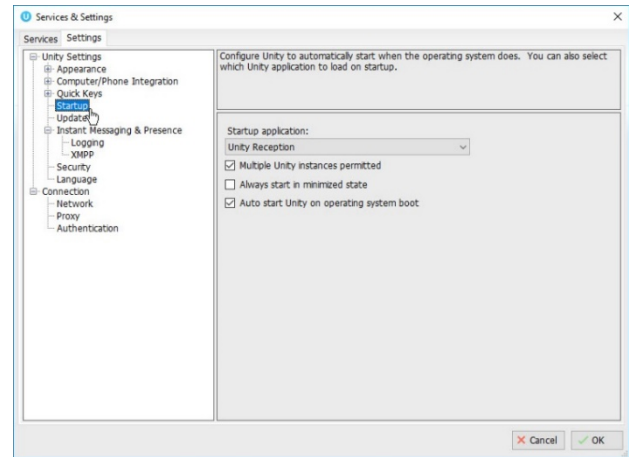
Startup Application: Choose the application to open at startup (options include your licensed application(s) and any Unity applications that may be available for a limited-time preview.)

Multiple Unity Instances permitted – Click to place a checkmark in the box to enable multiple Unity instances.

Always start in minimized state – Click to place a checkmark in the box to use this feature option on startup.

Auto start unity on operating system boot – Click to place a checkmark in the box to always start the selected Unity application when the system reboots.

2. Click  **OK** and select **Yes** to restart and update the system with the changes when prompted.



UPDATE

 **Settings > Settings tab > Update**

Manage automatic updates and access the manual update feature.

1. Select and define the following Update setting options:


Auto update Unity – Click to place a checkmark within the checkbox to enable automatic updates.

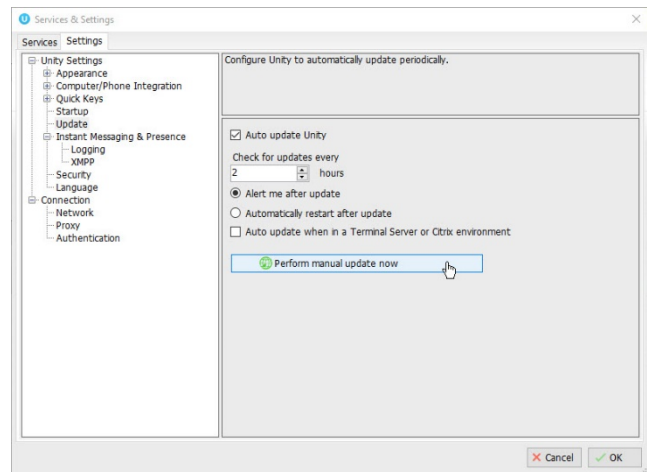
Check for updates every x minutes: Choose the number of hours between update checks using the selection tool.

Alert me after update – Select to receive an update notification prompt to restart.

Automatically restart after update – Select to automatically restart after an update.

Auto update when in a Terminal Server or Citrix environment – Click to place a check in the checkbox to enable auto-updates if the system is on a Terminal Server or in a Citrix environment.

2. Click  **OK** and select **Yes** to restart and update the system with the changes when prompted.



Manual Update

1. Go to **Settings > Settings tab > Update**
2. Click the **Perform Manual Update Now** button and follow prompts to get the latest update, if a newer version exists.

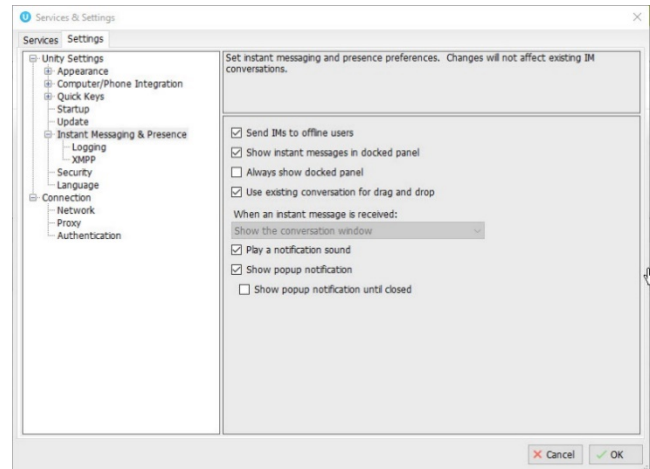
INSTANT MESSAGING & PRESENCE

Settings > Settings tab > Instant Messaging & Presence

Users may define preferences for IM and Unity presence. Changes saved here only affect future IM conversations.

1. Select from the following Unity Instant Messaging preference options:

- Send IMs to offline users** – Click within the checkbox to enable the ability to send instant messages to users who are available for IM but not logged into Unity.
- Show instant messages in docked panel** – Click within the checkbox to enable and display the IM panel when using Instant Messaging.
- Always show docked panel** – Click within the checkbox to enable and require Unity to always show the IM panel, whether it is in use or not.



- Use existing conversation for drag and drop** – Click within the checkbox to enable Unity to continue a conversation when a user is drag and dropped into the IM.

When an instant message is received: Show in the conversation window is preselected.

- Play a notification sound** – Click to place a checkmark within the checkbox to enable.
- Show popup notification** – Click to place a checkmark within the checkbox to enable.
- Show popup notification until closed** – click within the checkbox to enable Unity to require the user to close the notification window.

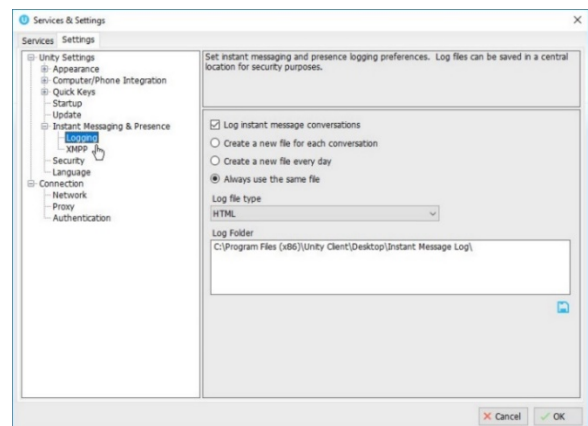
2. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.

Logging

Settings > Settings tab > Instant Messaging & Presence > Logging

1. Setup Instant Messaging and presence log file preferences:

- Log instant message conversations** – Click to place a checkmark within the checkbox to enable and select one of the following logging options:
 - Create a new file for each conversation**
 - Create a new file every day**
 - Always use the same file**



2. Define the log file type and location:
 - Log file type:** Choose the file type from the drop down list.
 - Log Folder:** Enter, or browse to and select, a folder location for the log file.
3. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.

XMPP

Settings > Settings tab > Instant Messaging & Presence > XMPP

Define the access details and subscription options when using IM in Unity. The XMPP server will be assumed from the domain entered as part of the Login ID.

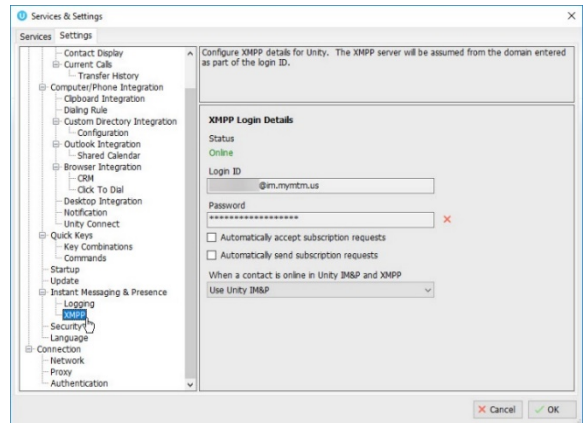
1. Enter, enable, or define the following settings as needed:
 - Login ID:** The login credential for the XMPP server.
 - Password:** The password for the XMPP server.
 - X (Delete Password) – Use Caution.** Once deleted, Unity will not connect to the XMPP server for Instant Messaging. Click the **X** icon adjacent to the password field and choose **Yes** when prompted to delete the XMPP password.

Automatically accept subscription requests – Click within the checkbox to enable or disable.

Automatically send subscription requests – Click within the checkbox to enable/ disable.

When a contact is online in Unity IM&P and XMPP: Choose the desired Unity display option (Use Unity IM&P, Use XMPP, or Use Both) from the drop-down list.

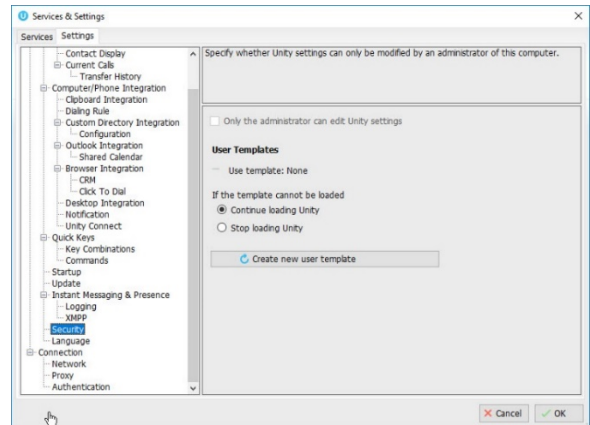
2. Click **OK** and select **Yes** to restart and update the system with the changes when prompted.



SECURITY

Settings > Settings tab > Security

Define whether Unity settings can only be modified by an administrator of this computer and whether Unity continues to open if the template cannot be loaded. Contact the Unity Administrator for assistance with modifying your access to these settings.

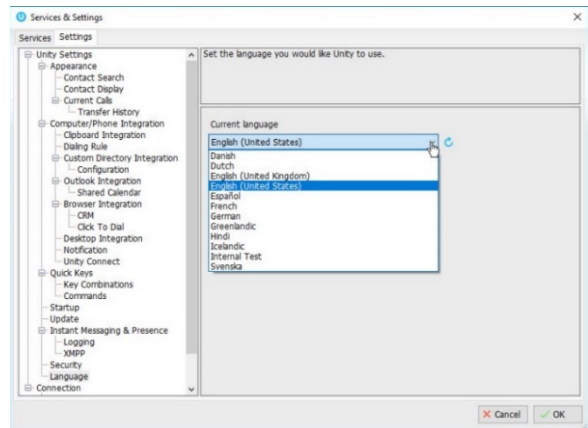


LANGUAGE

 **Settings > Settings tab > Language**

Manage language display in your Unity application(s).

1. Select the language to be used in your display while working in Unity from the drop-down list.
2. Click **OK** and select **Yes** when prompted to restart and begin using the new language in the Unity display.



CONNECTION SETTINGS

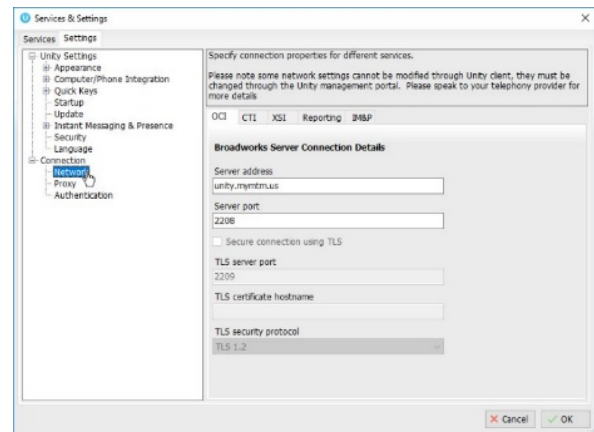
 **Settings > Settings tab > Connection**

Define and manage available network, proxy server, and authentication settings for Unity access. Note: Most connection settings must be managed in the Unity Portal by an administrator or the service provider. Use caution. Contact your Unity Administrator for assistance if these settings require modification.

NETWORK

 **Settings > Settings tab > Connection > Network**

Manage available network settings for OCI, CTI, XSI, Reporting and IM&P in the relevant tabs. Contact your Unity Administrator for assistance if these settings require modification.

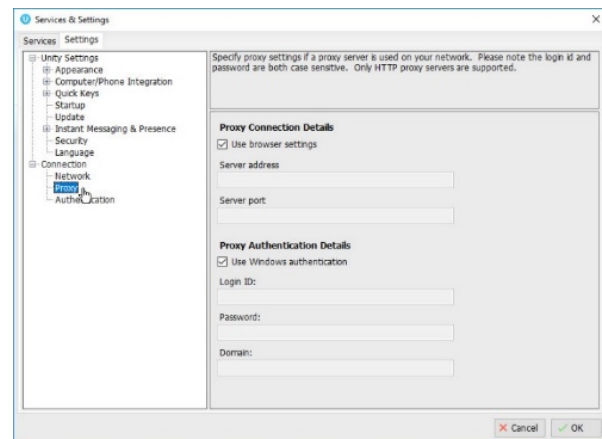


PROXY

 **Settings > Settings tab > Connection > Proxy**

Manage available proxy server settings (where a proxy server is in use within your system).

Contact your Unity Administrator for assistance if these settings require modification.



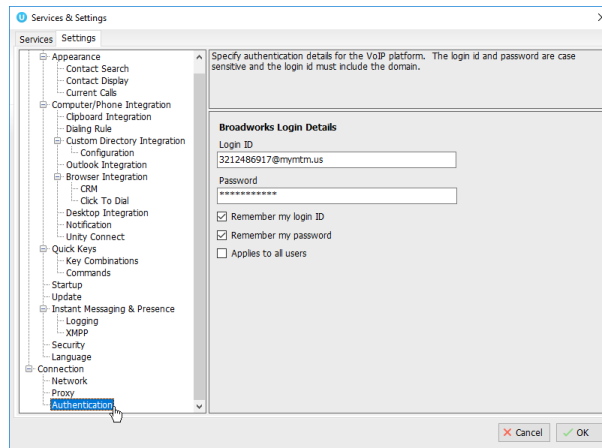
AUTHENTICATION

 Settings > Settings tab > Connection > Authentication

Manage Login ID and Password credentials for BroadWorks access.

Users must enter the correct BroadWorks Login ID and password, and may place checks next to the options to remember these credentials, as desired.

Click **✓OK** and select **Yes** when prompted to restart Unity.



10. MOMENTUM SUPPORT

A team of expert Customer Support professionals are here to assist with technical issues, questions related to billing, feature usage, service upgrades, as well as any other general inquiries you may have. Simply contact us and a representative will help you with your request.

In order to provide optimal support, we recommend that the Account Owner (or an Authorized Contact) submit a ticket online or contact us via our toll-free support number regarding any critical or timely issues that may require troubleshooting. And always keep your account number handy to help us better assist you when you need us.

Support by Phone: **888-538-3960**

Live phone support is available 24/7 for emergency assistance

Online Support: www.GoMomentum.com/support

Documentation: www.GoMomentum.com/mu

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Additional Training: Instructor-led training courses (LIVE web-based) are available upon request. Contact your Momentum Account Manager or Customer Care to find out about available course offerings for the products or services you have purchased and to get their assistance with requesting sessions for you and your team. They will ensure that a friendly and expert representative of the Corporate Training team contacts you to discuss availability and help to schedule training at a convenient time.

