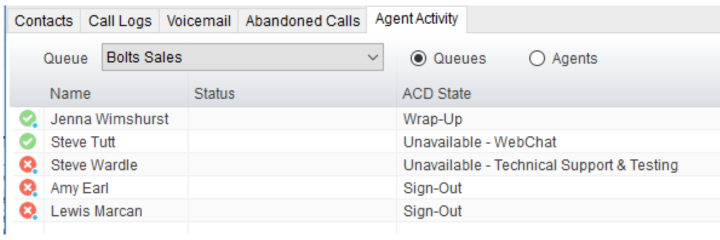
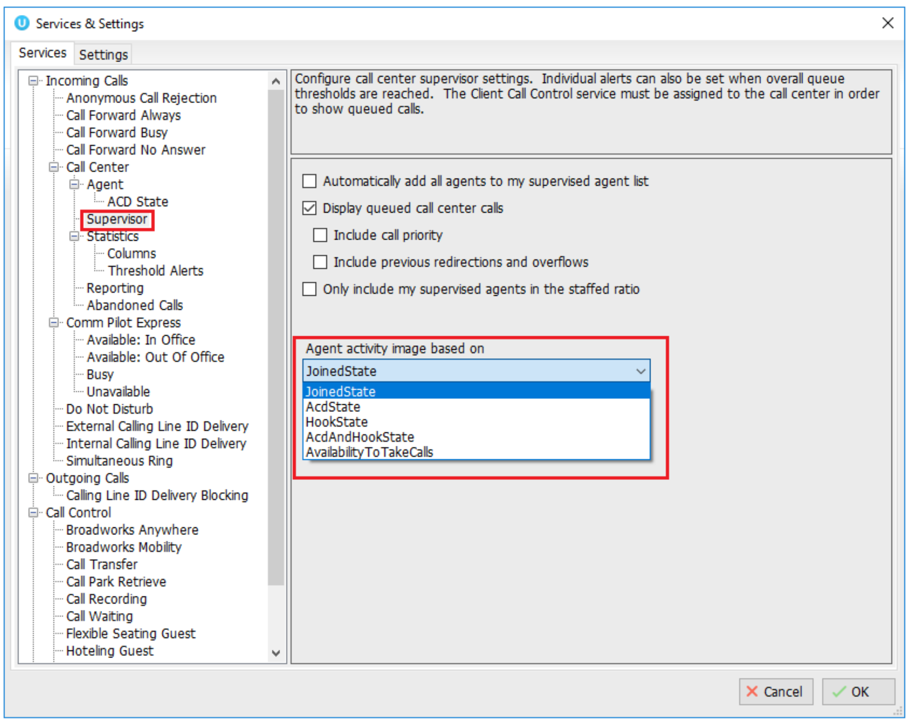
6.3.2 Changing The Agent’s Icon In The Agent Activity Tab

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

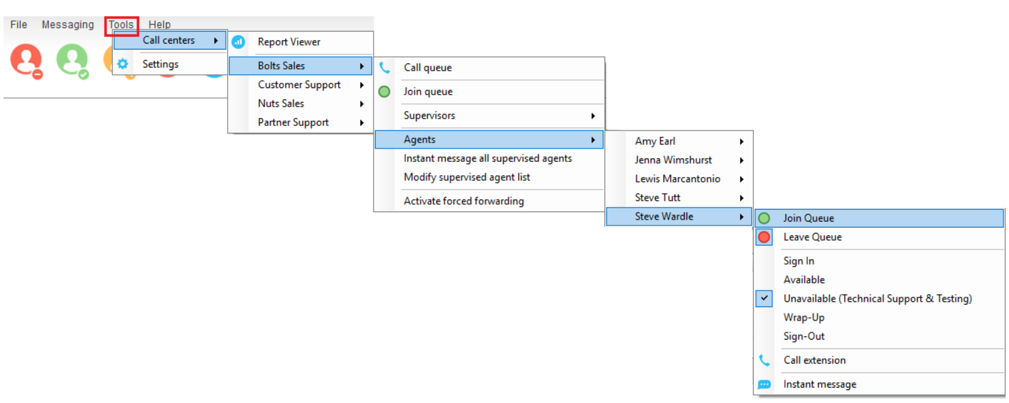


This is configured in Settings>Supervisor>Agent activity image based on, as shown below.



6.4 Remotely Changing Agent State from Tools Menu

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



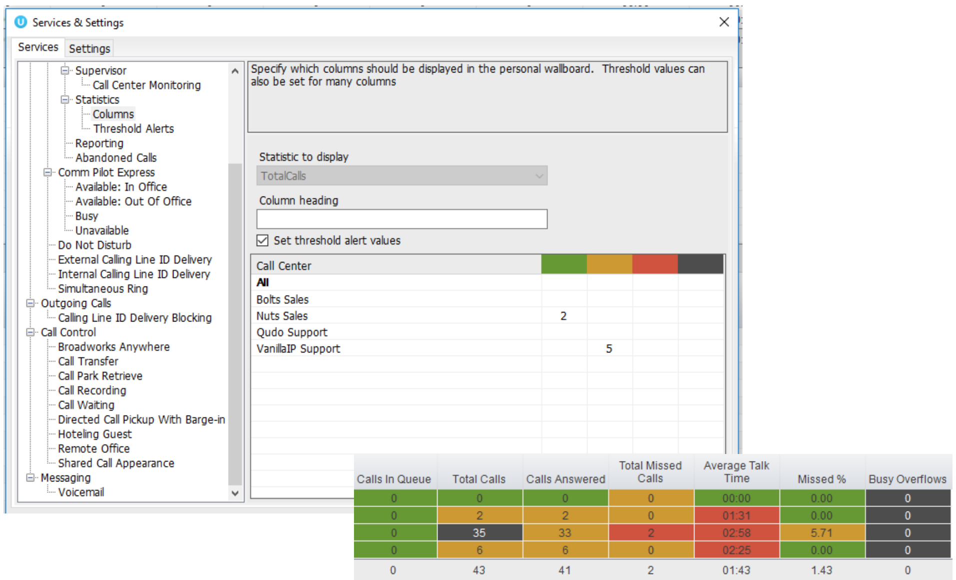
6.5 Threshold Alerts

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

6.5.1 Configuring Thresholds

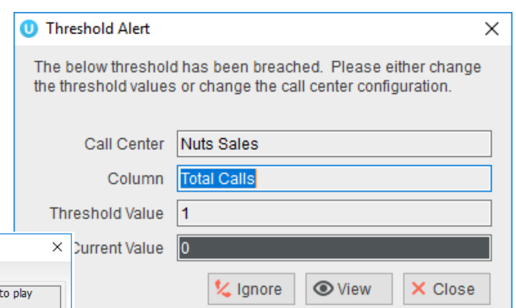
Click Settings [button] > Services [tab] > Statistics> Columns > Call Center Columns – double click the statics (e.g. total calls) to set thresholds. Different thresholds can be set for all queue parameters for different call centers, or all call centers can have the same threshold.

Double click the boxes to populate the threshold value. Tick OK to confirm.

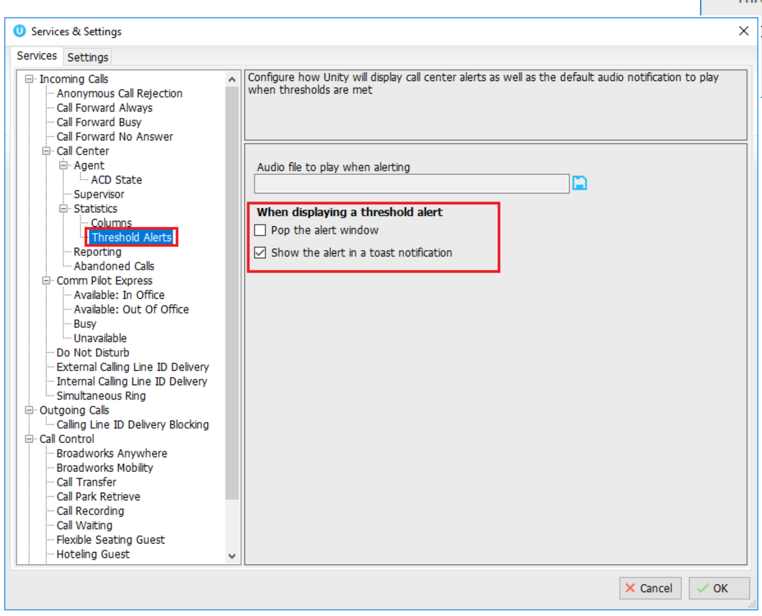


6.5.2 Alerting Options – Dialogue Box and Email

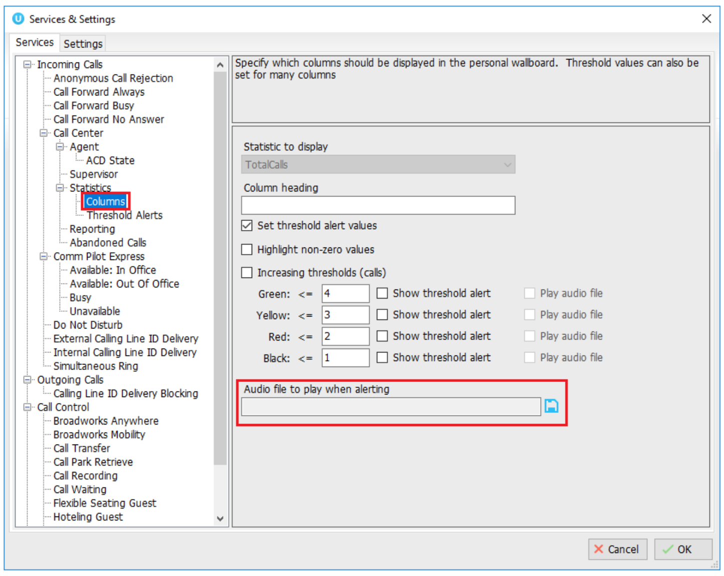
Unity Supervisor will pop-up a dialogue box indicating the threshold that has been breached.

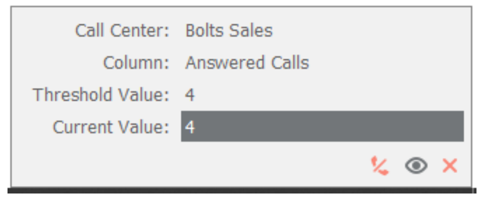


Supervisor can also be configured to show the alert in a toast notification.



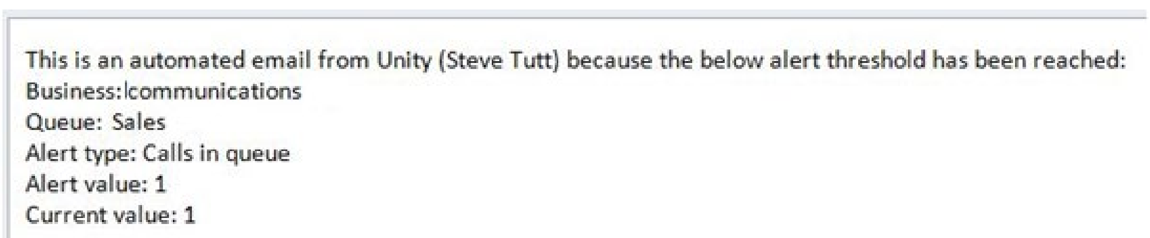
An audio alert can be set and used as a default, however this can be overridden for specific threshold values, as shown below. Please note: An audio alert can only be set if a visible alert has been set.





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

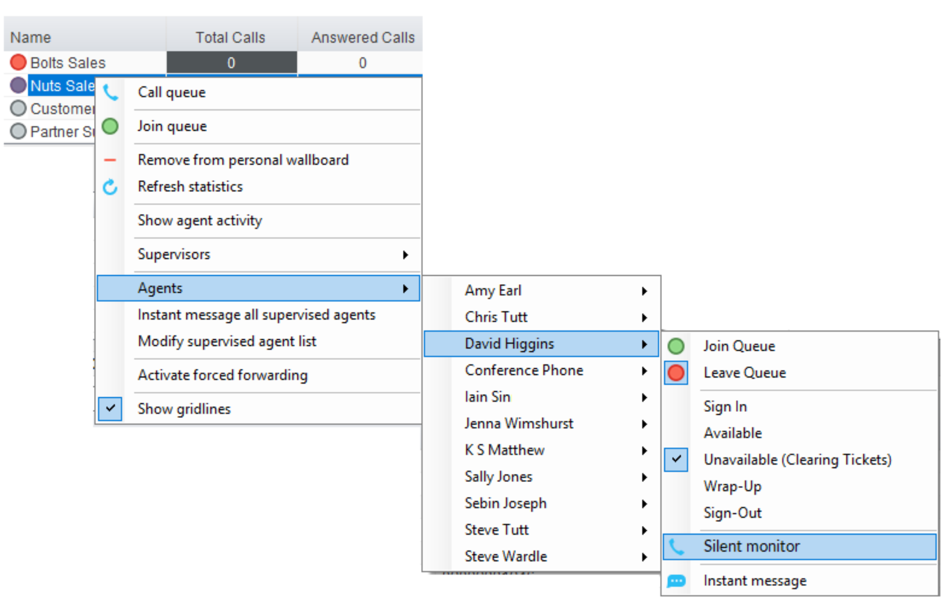
Where the “Send email to” field has been populated, Supervisor will send an alert by email as shown here:


This is an automated email from Unity (Steve Tutt) because the below alert threshold has been reached:
Business:Icommunications
Queue: Sales
Alert type: Calls in queue
Alert value: 1
Current value: 1

6.6 Silent Monitoring

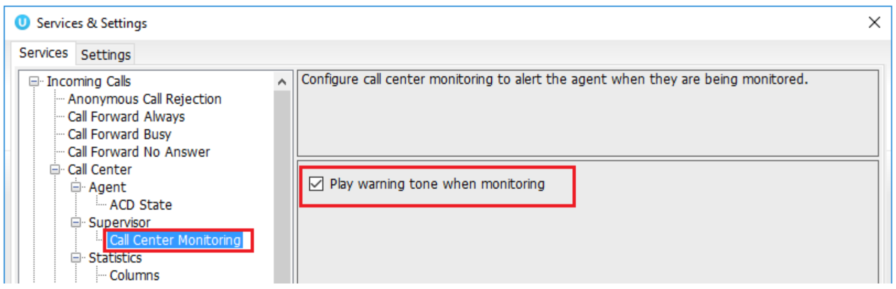
Allows the supervisor to silently monitor the next call or calls taken by a specified agent. Requires the Call Center Monitoring service assigned to the Supervisor in BWKS. Requires Call Center Agent Premium call center.

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



Silent Monitoring Warning Tone

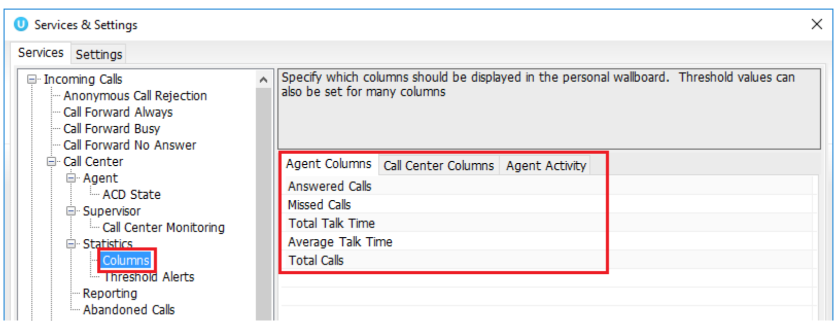
The supervisor can optionally play the agent a tone to alert them that they are being monitored. This can be toggled on/off in Settings [button] > Services [tab] > Supervisor.



6.7 Configuring Statistics Columns in Personal Wallboard

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

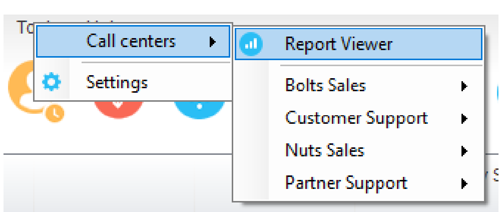
Statistics can be added or removed with the − + buttons and the order they are displayed, from left to right in the Personal Wallboard can be changed with the arrows. Top most is to the left.



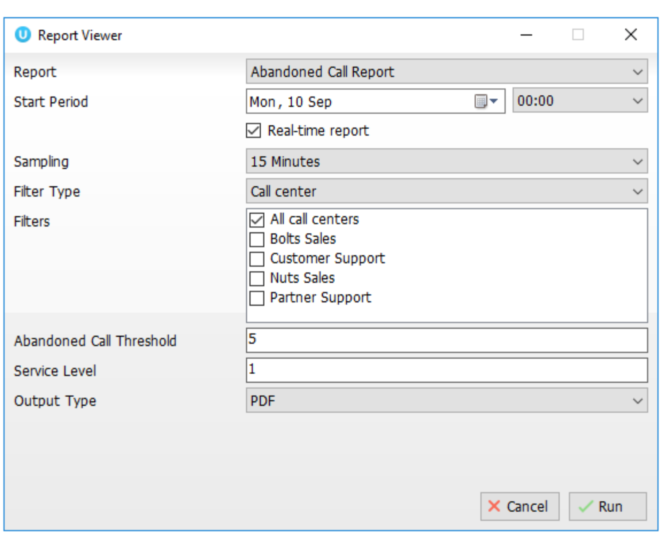
6.8 Running Reports

Note – Reports are set to OFF by default in Unity.

Unity Supervisor can be set to provide access to some real-time and historical reports provided by the BWKS DBS reporting server (some are now EOL). The information in these reports is entirely produced by BWKS and is not customizable beyond timeframes and agents or areas selected. To access reports click Tools > Call Center > Report Viewer.



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



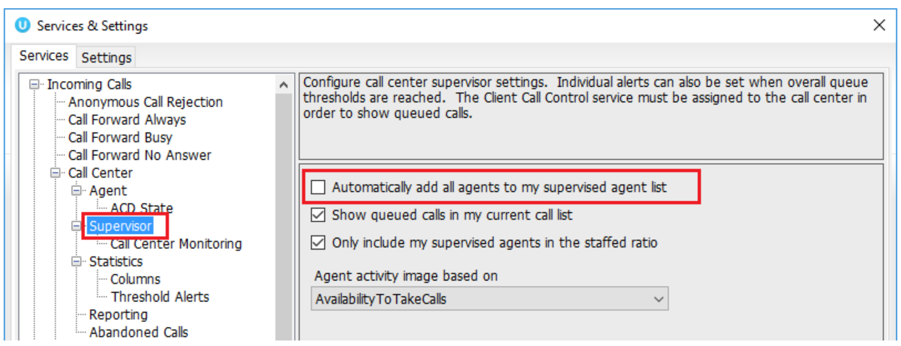
Supervisor reports can include:

Abandoned Call Report
Agent Summary Report
Call Center Call Detail Report
Call Center Incoming Calls Report
Call Center Presented Calls Report
Call Center Summary Report

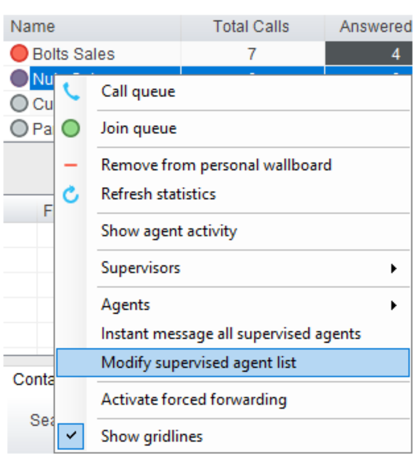
Agent Disposition Code Report
Agent Unavailability Report
Call Center Disposition Code Report
Call Center Overflow Matrix Report
Call Center Report
Service Level Report

6.9 Adding Agents to Monitored Agents List

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

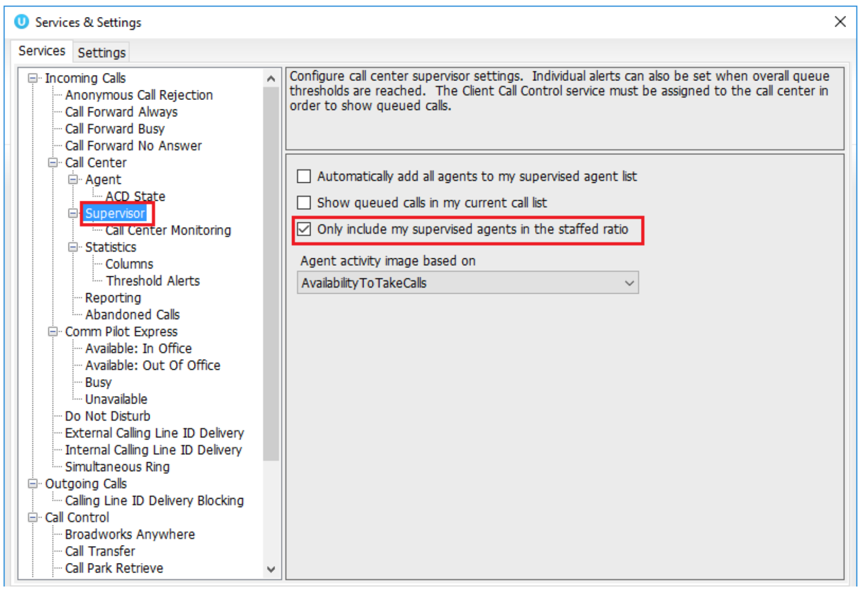


Right click the call center queue in Personal Wallboard, select “Modify supervised agent list” and add the agents you want to supervise.



6.10 Supervised Agents in Staffed Ratio Statistic

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



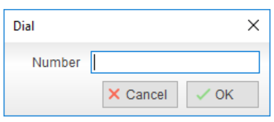
7 CALL CONTROL

All calls are managed through the call control buttons at the top of the application. These buttons will change depending on the state of the selected call, or the only call if there is only one call in the Active Call Window. For example, the Answer/Release and Hold/Retrieve buttons toggle as only one of these options will be valid at any time. When an inbound call is ringing Answer becomes the valid option. Once the call is active the icon will toggle to Release as hanging up is the only valid option.

7.1 Making a Call

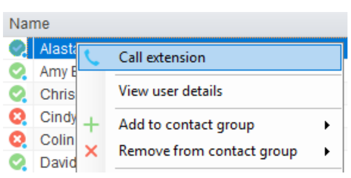
7.1.1 Using the Dial Window

Click the Dial button to bring up the Dial dialogue box, as shown below. Using the computer keypad enter the desired number and press Enter or click OK to make the call. The desk telephone will default to using hands-free speakerphone. If the telephone does not support speakerphone, you will need to lift the handset when the call is answered.



7.1.2 Using the Contacts Panel

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



7.1.3 Drag and Drop

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

7.1.4 Using Directory Search

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

7.1.4 Dialing from the clipboard

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

7.2 Answer a Call

When Unity displays an inbound call, click the Answer icon 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.

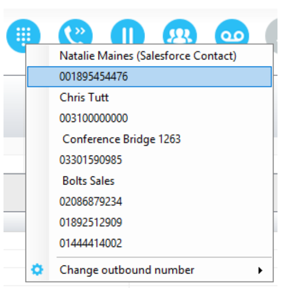
7.3 End a Call

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

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

7.3 Redial

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



7.4 Send Call to Voicemail

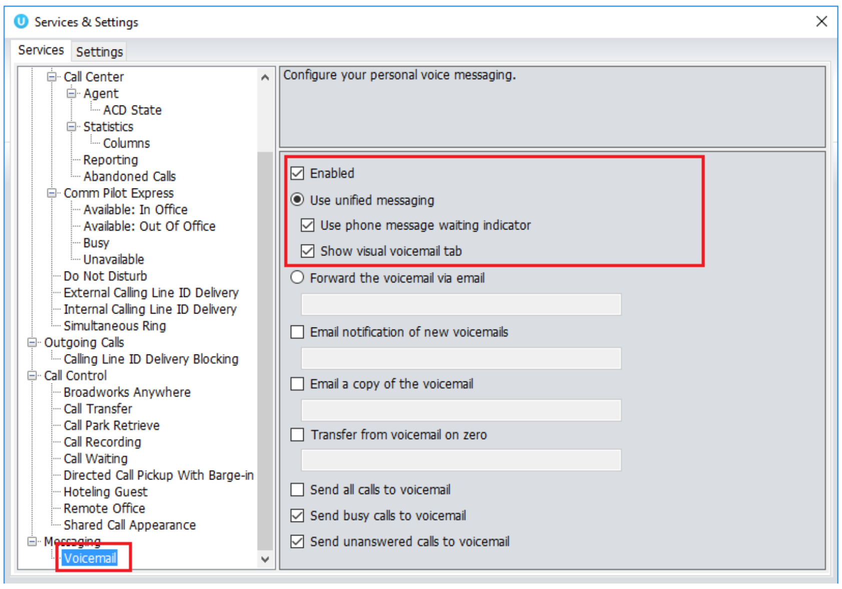
To send an inbound caller directly to your voicemail click the Voicemail button .
Please note that if voicemail is not assigned or is disabled, the button will still be visible but inactive.

7.4.1 Retrieving Voicemail Messages via Voicemail Button

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

7.4.2 Retrieving Voicemail Messages via Voicemail tab

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



7.5 Transferring a Call

There are two ways to transfer a call; Announced Transfer, where you introduce the call to the receiving party before putting the call through, and Blind Transfer, where you transfer the caller directly to a recipient without introducing the call. Please note that calls can be transferred both to internal users and external contacts.

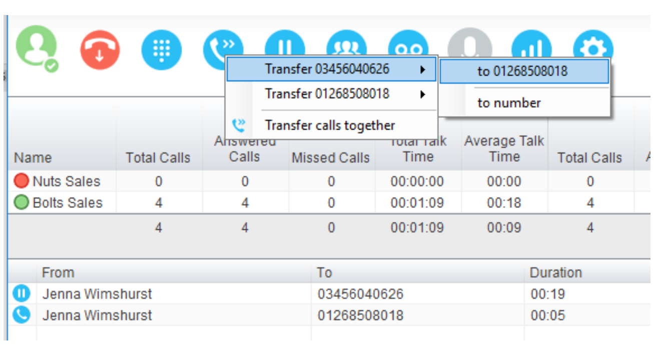
7.5.1 Announced Transfer

Receive and answer an inbound call. Make a new call to the desired destination extension or number as described Make a Call above. This will automatically place the first caller on Hold and will open a new call in the Active Call Window. Once the called party answers, click Transfer  and select the context menu option to transfer both calling parties together. Both calls will now disappear from the Active Call Window.

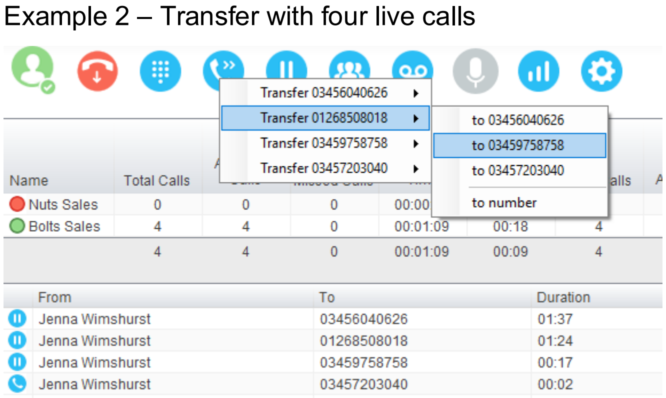
Note: The user is not limiting to transferring received calls. They can make two outbound calls and then use transfer to “bridge” them together.

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

Example 1 – Transfer with two live calls

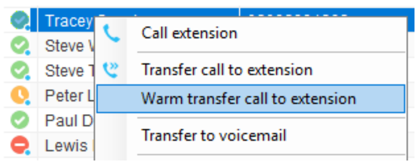


Example 2 – Transfer with four live calls

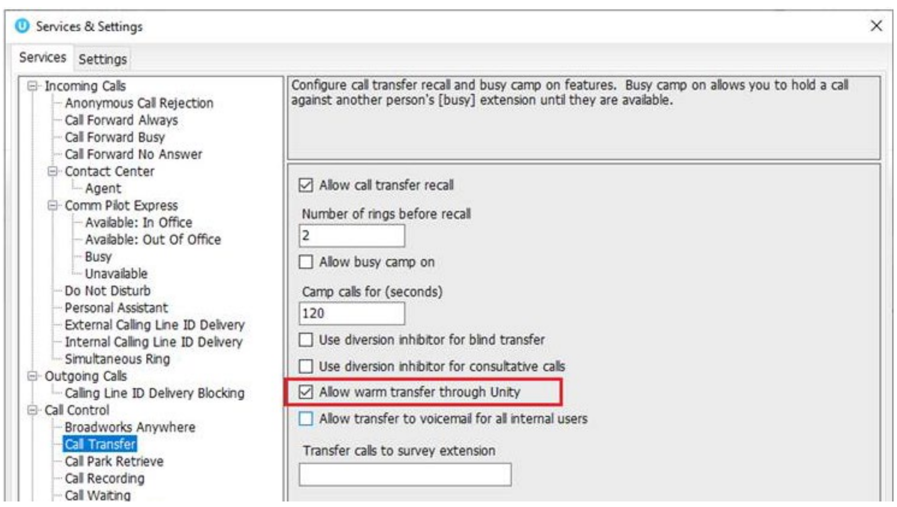


7.5.1.1 Warm Transfer

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



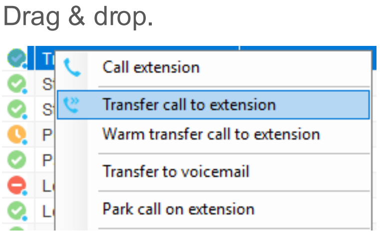
Please note that “Allow warm transfer through Unity” must be activated in order to see this option in the context menu. To do this go to Settings>Services>Call Control>Call Transfer, as shown below.



7.5.2 Blind Transfer

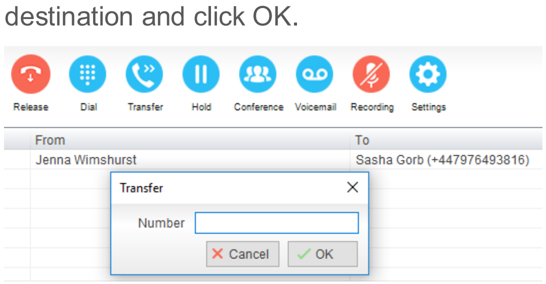
7.5.2.1 Using Contacts Panel Drag and Drop

Unity Supervisor can be configured to automatically blind transfer a call by dragging the call from the Active Call Window and dropping it on a user icon or number icon in the Contacts panel, or dropping it onto a call center queue [if supervisor is configured as an supervisor with call center queues]. Note: Unity can be configured to display a menu when dropping a call onto a user icon. If no menu options are selected the blind transfer is performed. If menu options are selected, click “Transfer call to extension” to also perform blind transfer. See section 9 for more information on Drag & drop.



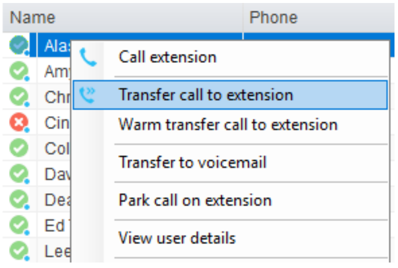
7.5.2.2 Using Transfer Button

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



7.5.2.3 Using Right Click

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

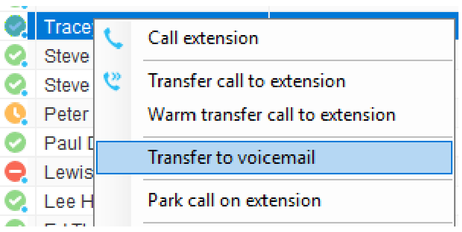


7.5.3 Transfer to Voicemail

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

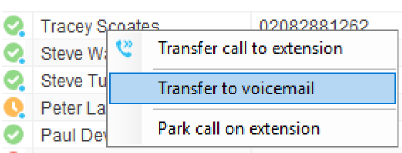
7.5.3.1 Using Contacts Panel Right Click - Voicemail

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



7.5.3.2 Using Drag and Drop

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



7.5.4 Transfer to Mobile

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

7.5.4.1 Using Contacts Panel Right Click - Mobile

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

7.5.4.2 Using Drag and Drop

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

7.6 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

7.6.1 Placing a Call on Hold

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

7.6.2 Retrieving 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.

7.7 Conference Calling

A conference call can be established with any combination of internal and external numbers. The total number of parties that can be supported is determined by service assignment. The Three-Way Calling user service supports conference calls with two other parties only while the N-Way Calling user service supports conference calls with more participants.

7.7.1 Starting a Conference Call

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

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

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

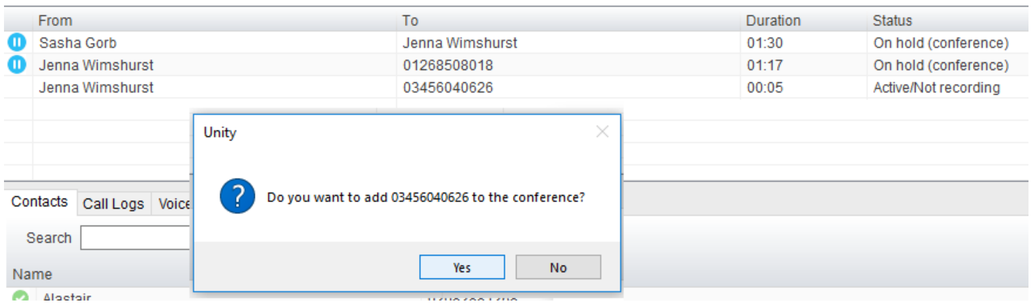
From	To	Duration	Status
Sasha Gorb	Jenna Wimshurst	00:15	Active (conference)/Not recording
Jenna Wimshurst	01268508018	00:02	Active (conference)/Not recording

Selecting either call or 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)

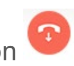
7.7.1.1 Adding Multiple Parties

Once you have a conference established you can add additional parties by calling them. This will place the existing conference on hold. Now click the Conference button . You will be prompted to add the new party to the existing conference as below.

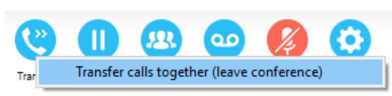


Please note that conference calls can be started with any two remote calls, regardless of the direction of either call or if the number is internal or external [for example between two mobile calls].

7.7.2 Ending a Conference Call

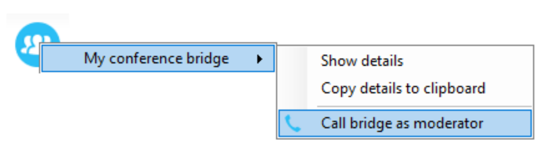
To remove a caller from the conference call but continue speaking to the other caller[s], simply select the call to release in the Active Call Window and click the Release button  as you would normally. This will release the selected party and will show only the remaining party[s] in the Active Call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

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



7.7.3 Conference Bridge Integration

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

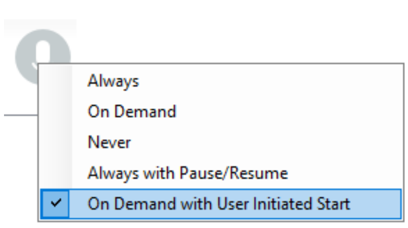


7.8 Call Recording

Note: Call Recording is OFF by default. 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 is not assigned, then the Call Recording button is not displayed in the main window.

7.8.1 Changing the Call Recording Option

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



Call Recording options are:

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

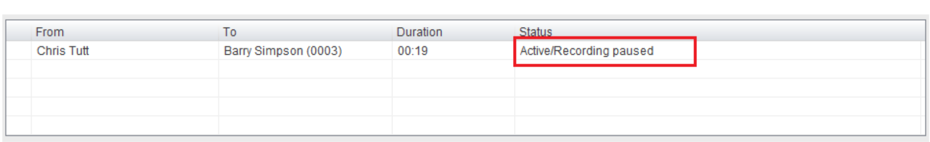
7.8.2 Controlling Call Recording

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

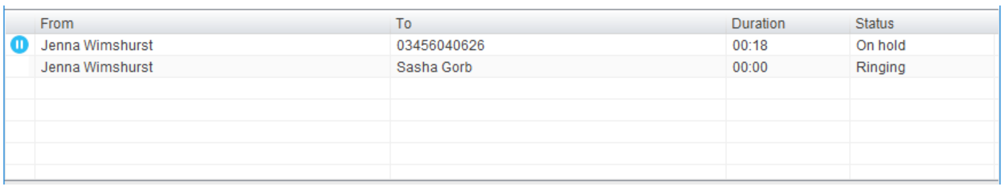


From	To	Duration	Status
Chris Tutt	Barry Simpson (0003)	00:19	Active/Recording paused

8 ACTIVE CALL WINDOW

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

8.1 Window Layout

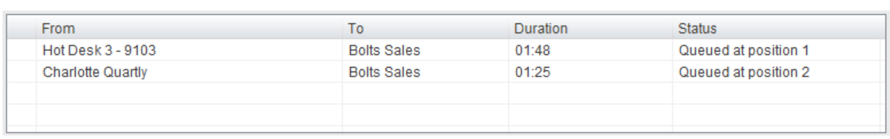


From	To	Duration	Status
Jenna Wimshurst	03456040626	00:18	On hold
Jenna Wimshurst	Sasha Gorb	00:00	Ringing

From – This field will display the incoming CallerID or the name if it is matched in the Group/Enterprise directory, Personal Contacts or Outlook Contacts.
To – This field displays the name of the user, hunt group or call center that has been called ensuring the call can be answered appropriately.
Duration – This displays the total time elapsed since the call was first answered. The timer does not restart when the call is placed on hold.
Status – This shows the Ringing/Active or the On Hold status of each call.

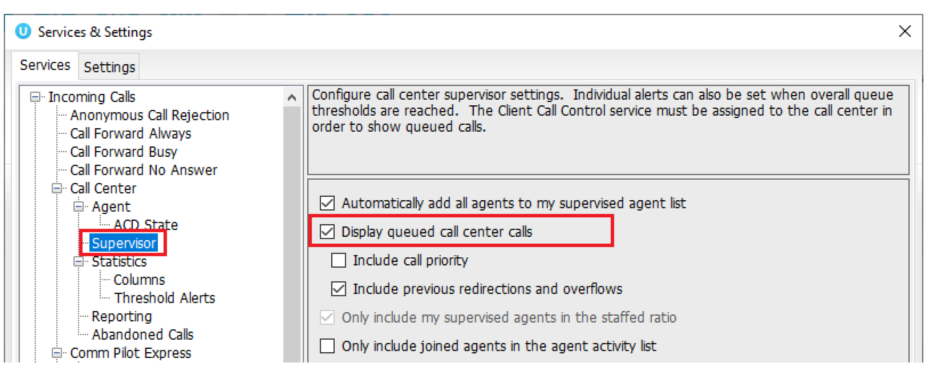
8.1.1 Queued Calls/Calls in Queue

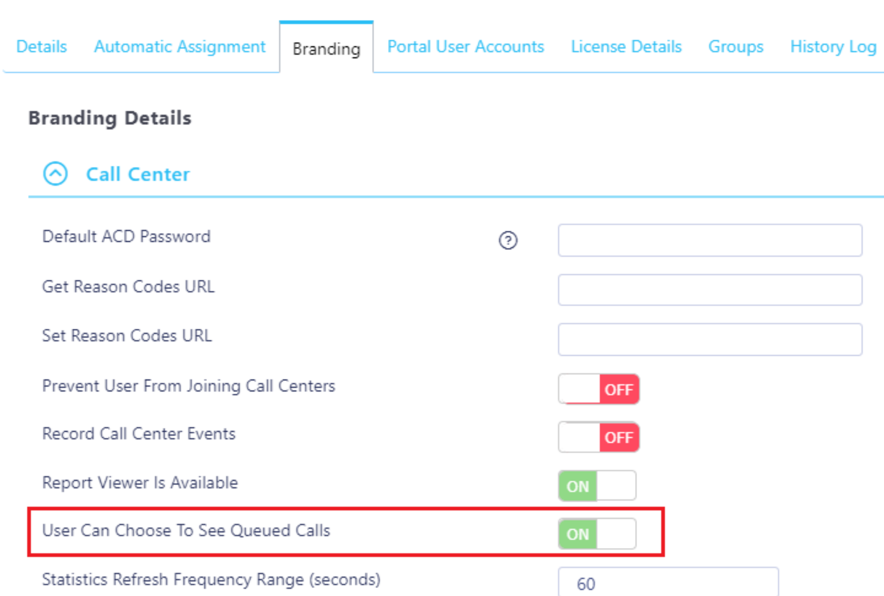
Users can optionally see all calls in queue for the Call Centers they are joined to, as shown below.



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

To set this, go to Settings > Services > Supervisor and tick the relevant box. If the box is greyed out, then the setting “User can choose to see queued calls” needs to be enabled in the Kakapo Portal underneath the Branding section.





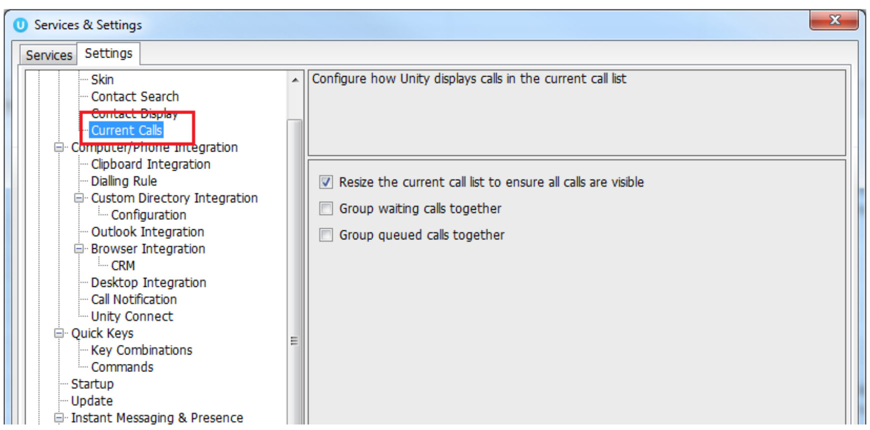
8.2 Managing Multiple Calls

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

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

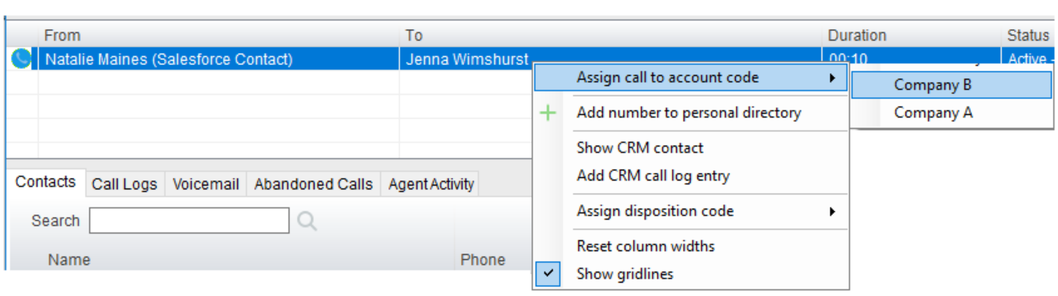
8.3 Resizing the Current Call List

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

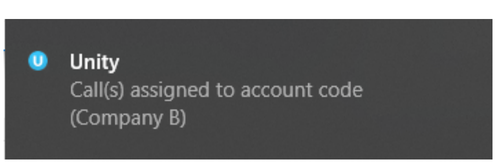


8.4 Assigning an Account Code

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



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



9 DRAG AND DROP

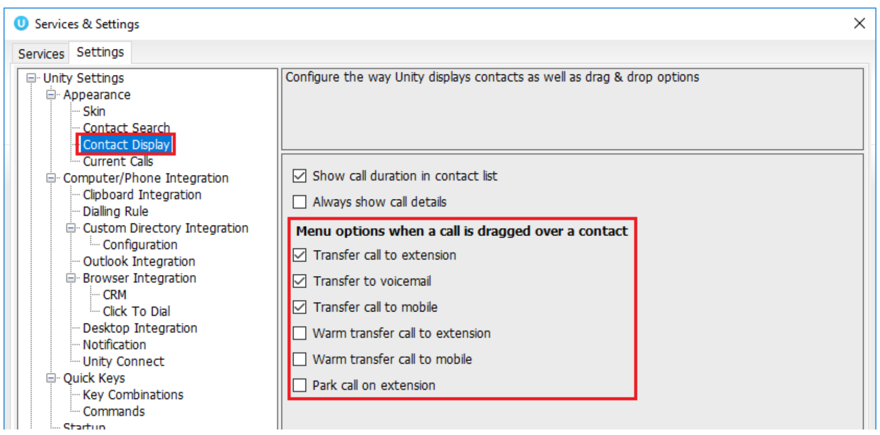
Many common call handling actions can be performed with drag and drop, as well as right click and call control buttons.

9.1 Make a Call to a User or Number

Drag a user icon 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.

9.2 Transferring a Call to a User

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



9.3 Make a Call to a Call Center Queue

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

9.4 Transferring a Call to a Call Center Queue

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

9.5 Send to Voicemail

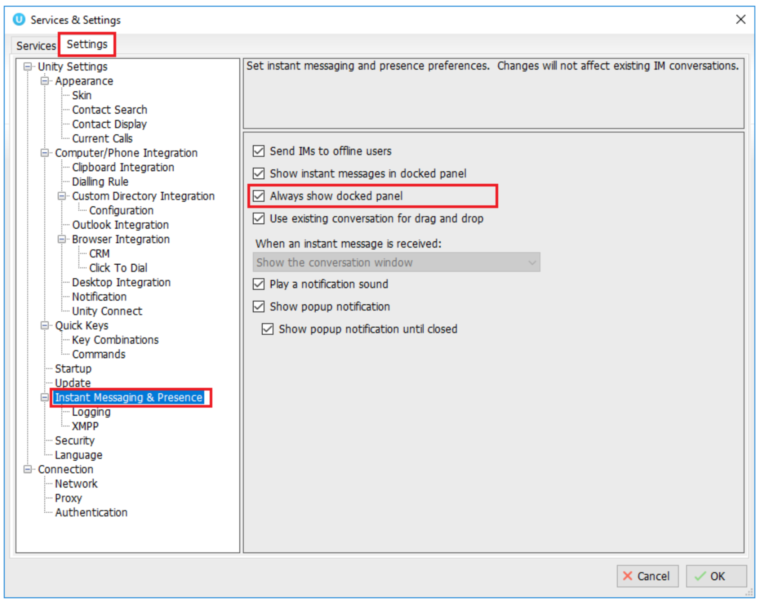
Dragging an unanswered call from the Active Call Window onto the Voicemail button will blind transfer the incoming call to your voicemail.

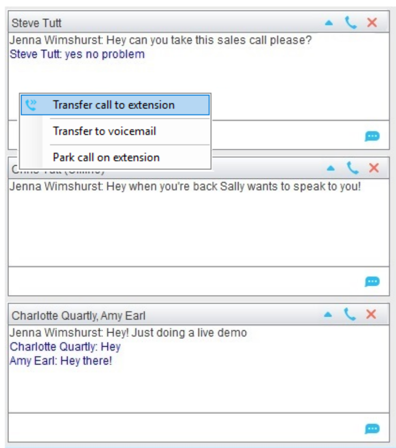
9.6 Call Control

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

9.7 Send New Instant Message

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

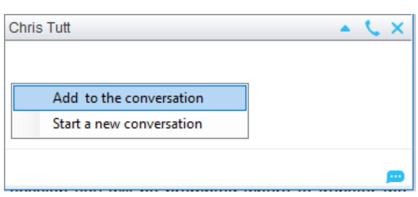




See also section 11 on Instant Messaging.

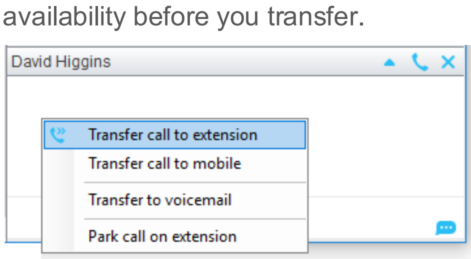
9.7.1 Add Participant to Existing IM Session

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

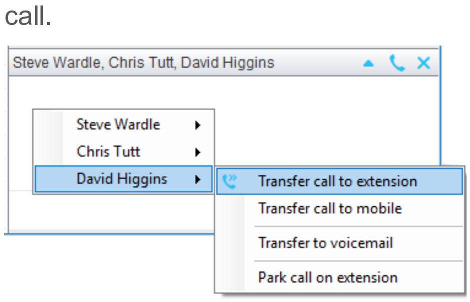


9.7.2 Transfer Call to IM Participant

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



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

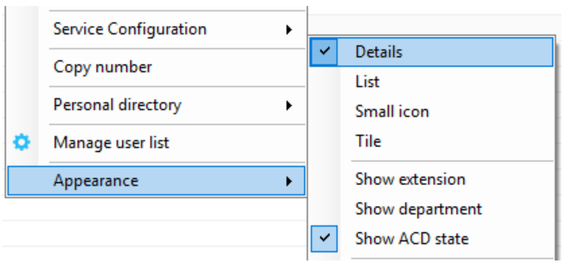


10 CONTACTS PANEL [BUSY LAMP FIELD]

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

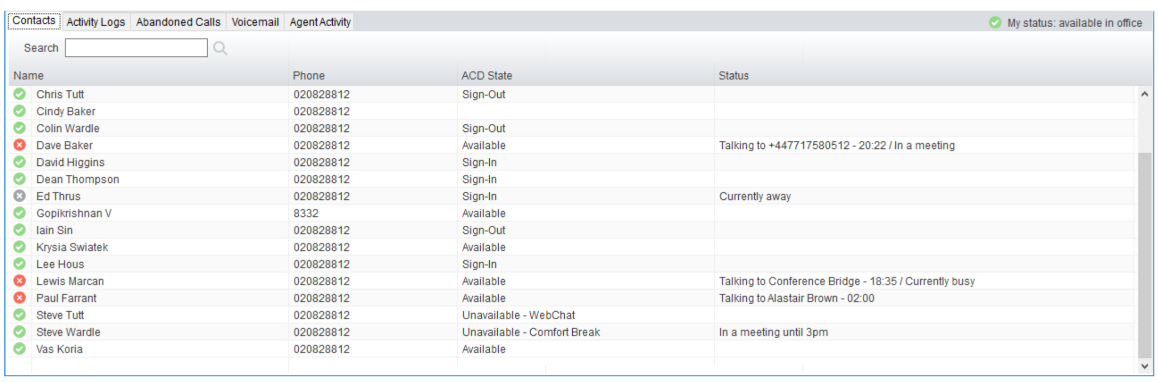
10.1 Contact Panel Display Options

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

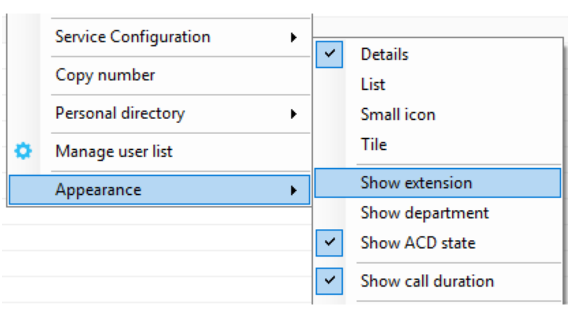


10.1.1 Details View

This view provides by far the greatest amount of detail but requires more space [although the list can be shortened in which case scrollbars will automatically appear].

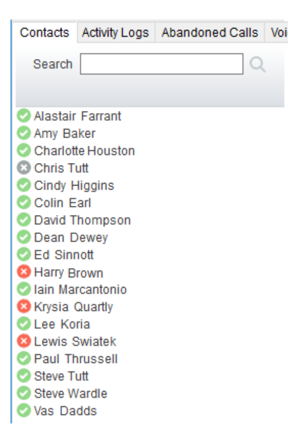


With this view the sort order for each column can be set, which is saved when Unity is closed. You can also configure Unity to display or hide the extension, department, ACD state and call duration columns.



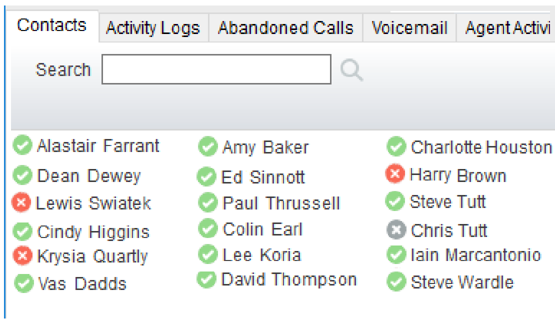
10.1.2 List View

This option will display all users in a list.



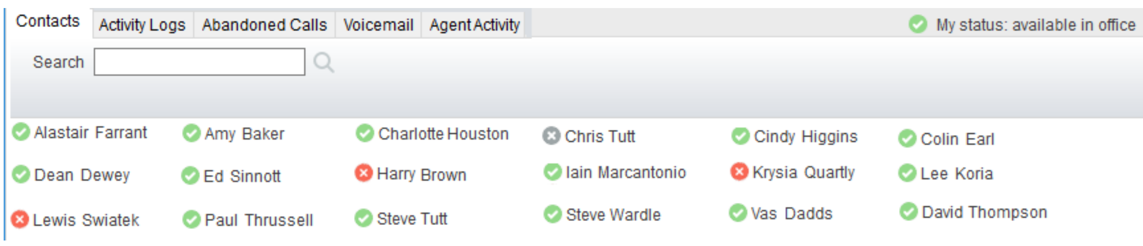
10.1.3 Small Icon View

This view combines a simplified look and space reduction.

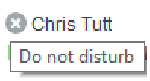


10.1.4 Tile View

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



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



10.2 User Icons

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

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

10.2.1 User Icon Engaged Tool Tip

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

Please note that the tool tip is only available when displaying the contacts using the Small Icon or Tile view.

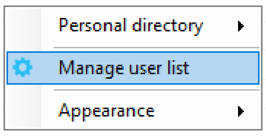
10.2.2 Instant Messaging Availability

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

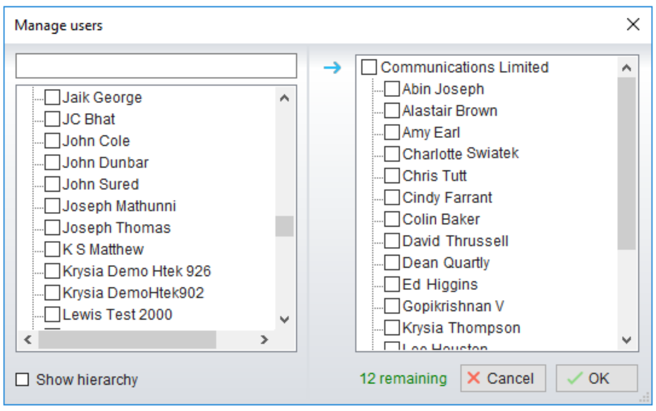
	Ringing. Unity open and available for IM
	DND/Unavailable profile. Unity open and available for IM
	Engaged. Unity open and available for IM
	Available/on-hook. Unity open and available for IM

10.3 Managing Monitored Users in the Contacts Panel

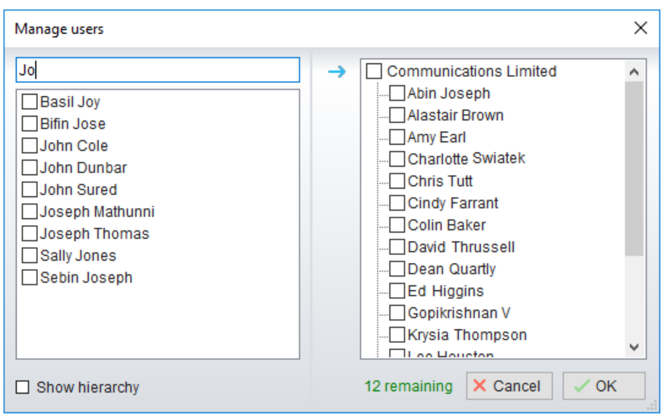
The Contacts panel will display 30 users. In the Contacts panel right click anywhere and click “Manage user list”. This will allow you to choose which users to display.



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



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



10.4 Performing Call Control Actions in the Contacts Panel

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

10.4.1 Call Extension

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

10.4.2 Answer This Call [Call Pick-Up]

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

Feature Dependency:

I. Monitored user must be ringing [orange icon]

II. Supervisor and monitored users must be in the same pick-up group

10.4.3 Park Call on Extension

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

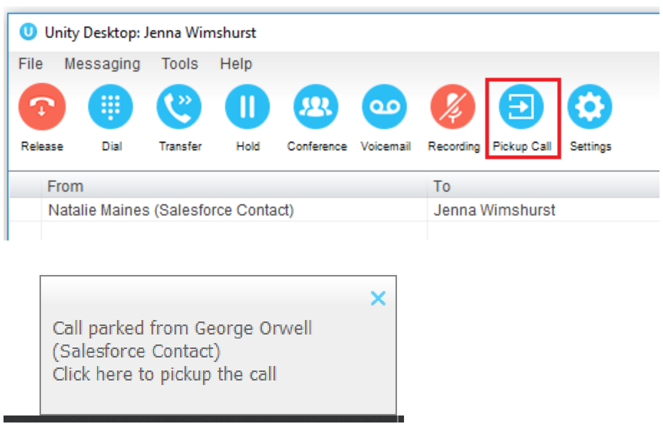
Feature Dependency

I. Must have a live call

II. Must have Call Park enabled.

10.4.4 Retrieving Parked Calls

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



10.4.5 Camp Call on Extension

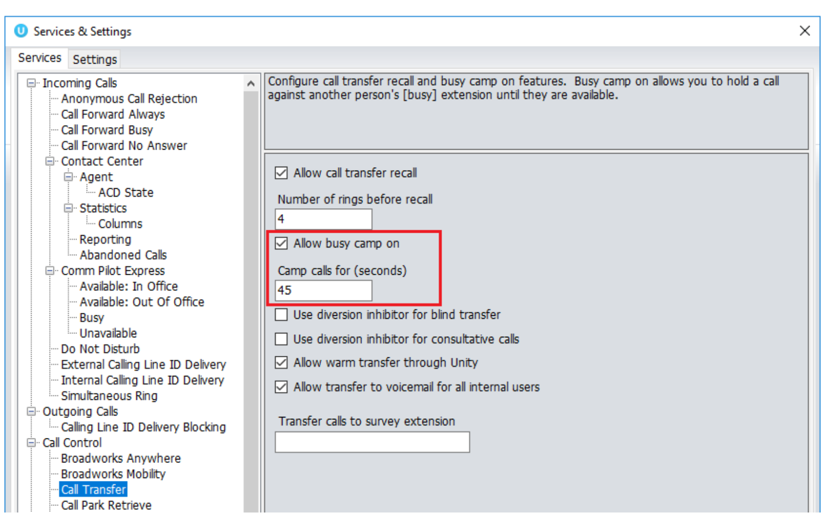
Will camp the call onto the engaged monitored user. When the user goes back on-hook the camped call will be delivered and their phone will start ringing. If the user does not go back on-hook before the camp timer expires the call will return to the Supervisor user.

Feature Dependency

I. Must have a live call in the Active Call Window

II. Must be enabled in Settings > Call Transfer as below

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



10.4.6 Call Mobile

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

Feature Dependency:

The monitored user must have their mobile number entered in BWKS

10.4.7 Transfer Call to Mobile

Performs blind transfer call to monitored users mobile.

Feature Dependency:

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

10.4.8 Transfer Call to Voicemail

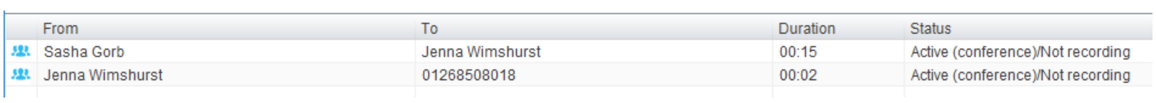
Performs blind transfer to the destination user's voicemail.

Feature Dependency:

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

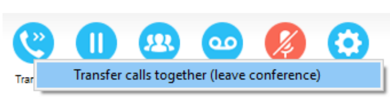
10.4.9 Barge into This Call

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.

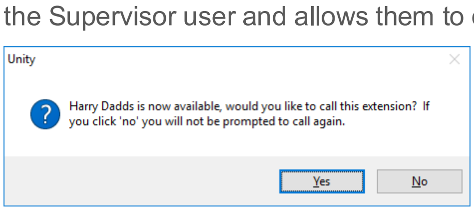


Feature Dependency:

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

10.4.10 Call Extension When Available

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

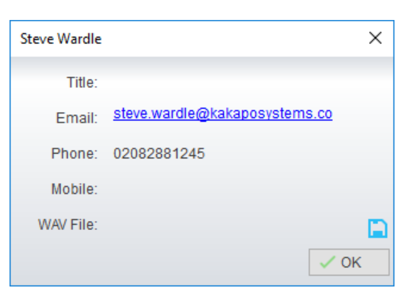


Feature Dependency:

I. Monitored user must be engaged on a call

10.4.11 View User Details

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



10.4.12 Adding Audio Alerts to Monitored Users

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

10.4.13 Send Email

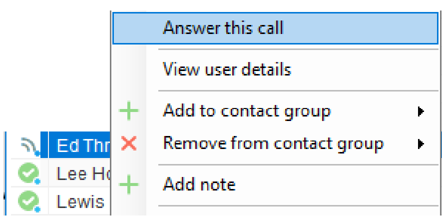
This will open a new email window in the default Email application. The user must have the email filed populated against their name in BWKS.

Feature Dependency:

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

10.4.14 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.



Feature Dependency:

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

11 INSTANT MESSAGING

Instant messages can be sent and received between any Unity app [Reception, Desktop, Agent, or Supervisor]. Messages sent to offline user [those that do not have an instance of Unity open] can be stored and delivered when the recipient next opens Unity.
The maximum character limit for each instant message is 700.

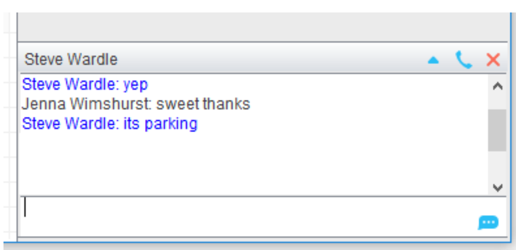
11.1 Online/Offline Indicator

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

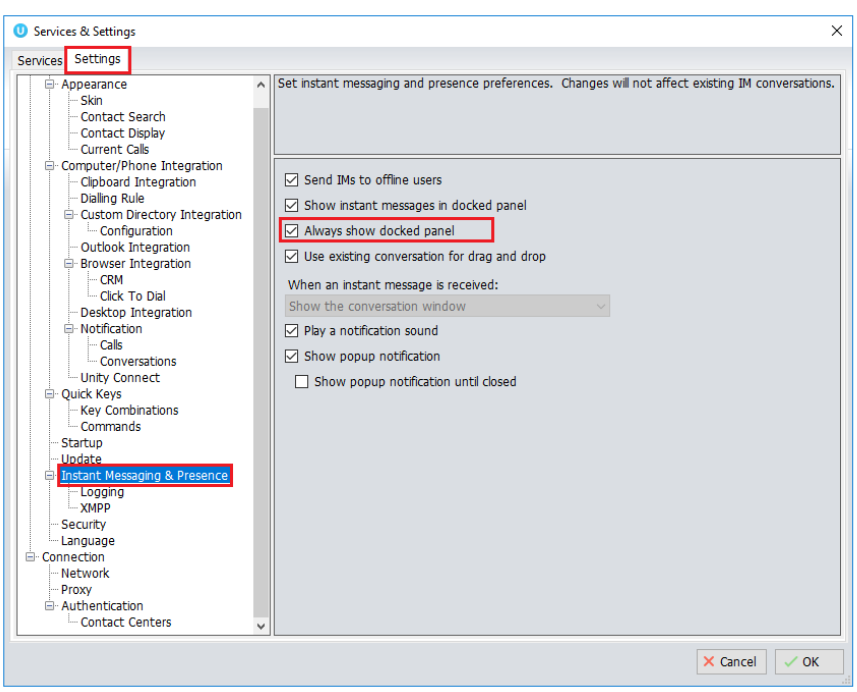
State	Online [Unity Open]	Offline [Unity Closed]
Available		
Ringing		
Engaged		
DND/unavailable profile		

11.2 Docking the IM Window

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



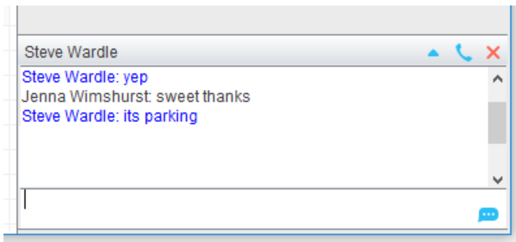
Docking the IM window is specified in Settings > Settings > Instant Messaging and Presence > “Show instant messages in docked panel”. Individual IM messages can still be undocked and redocked as required.



11.3 Undocking and Redocking IM sessions

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

Docked IM

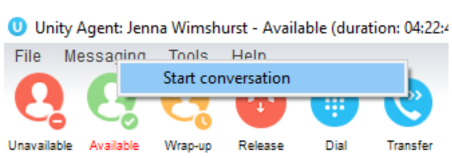


Click the “Dock conversation in main window” button to pull the IM session back into the docked panel in the main Supervisor interface.

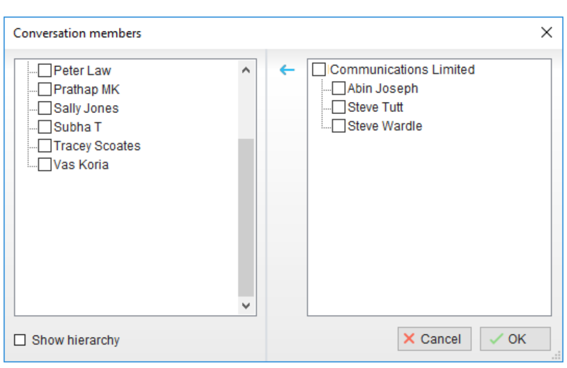
Undocked IM

11.4 Sending an Instant Message

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



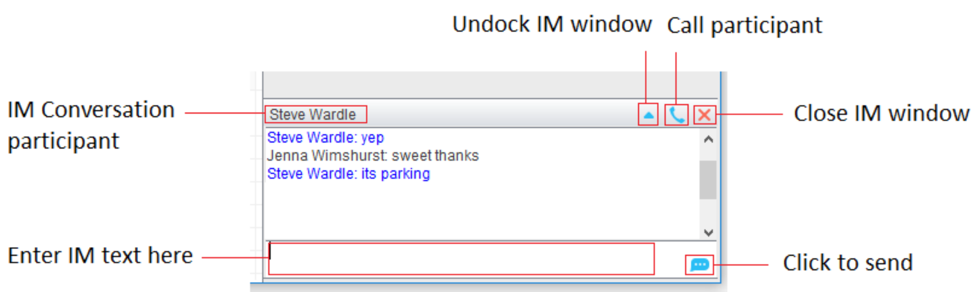
You can then select the users to include in the IM conversation. Please note that only online users will be displayed in the lists. The left list contains all online users, to include them in the IM conversation move them into the right list either by double-clicking the entry or using the arrow button.



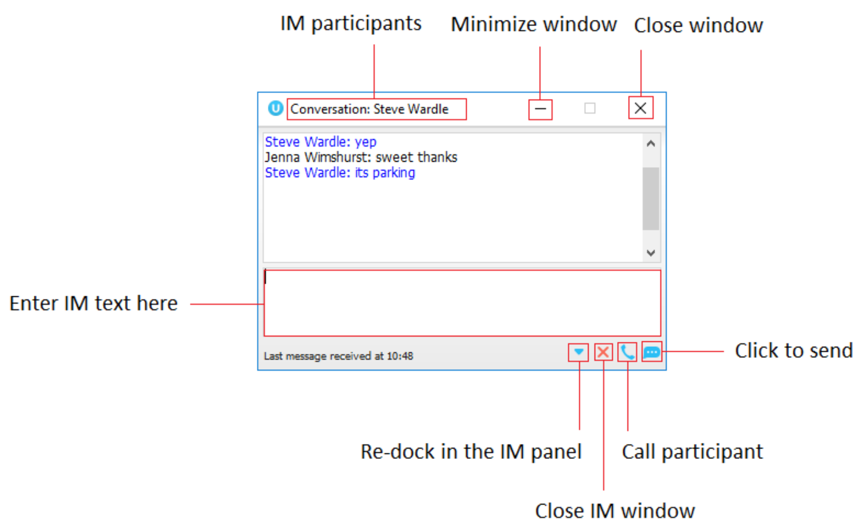
11.5 Overview of IM Window

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

IM Window - Docked

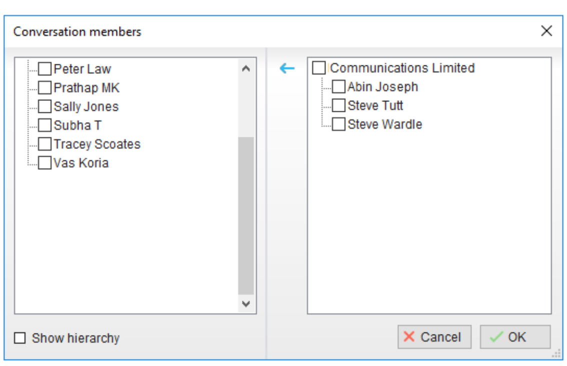


IM Window – Undocked



11.6 Adding Participants to an Existing IM Session

When an IM conversation is in the Docked IM panel you can drag a user icon from the Contacts Panel or Search and drop them on the IM window to add them to the conversation. When the IM Window is undocked, you click the Search icon and select participants to add to the conversation, as below.



11.7 Sending Contact Directory Numbers

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

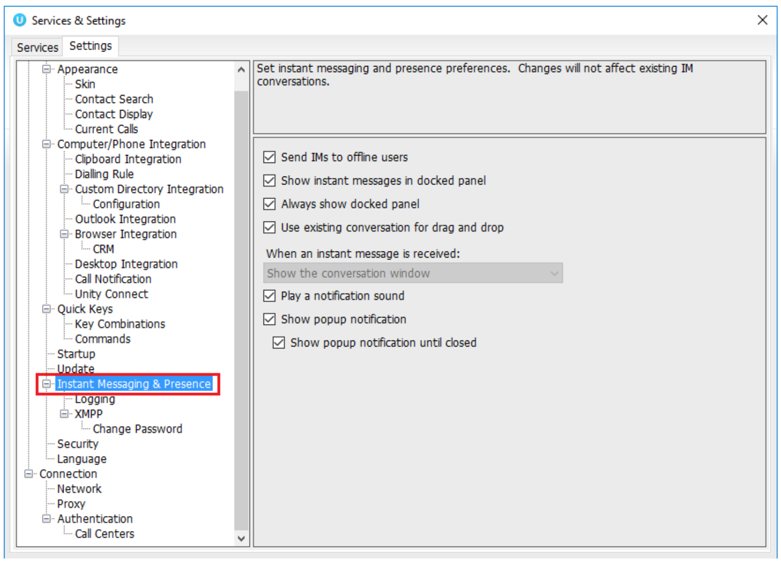
Feature Dependency:

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

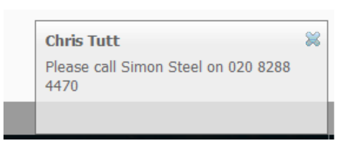
III. The Supervisor user must have their outlook client open, and they must have full sharing Permissions to see the monitored user's Calendar in Outlook

11.8 IM Notification Settings

All notification options for IMs, including sound and popup notifications can be found in the settings under Instant messaging & Presence.



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

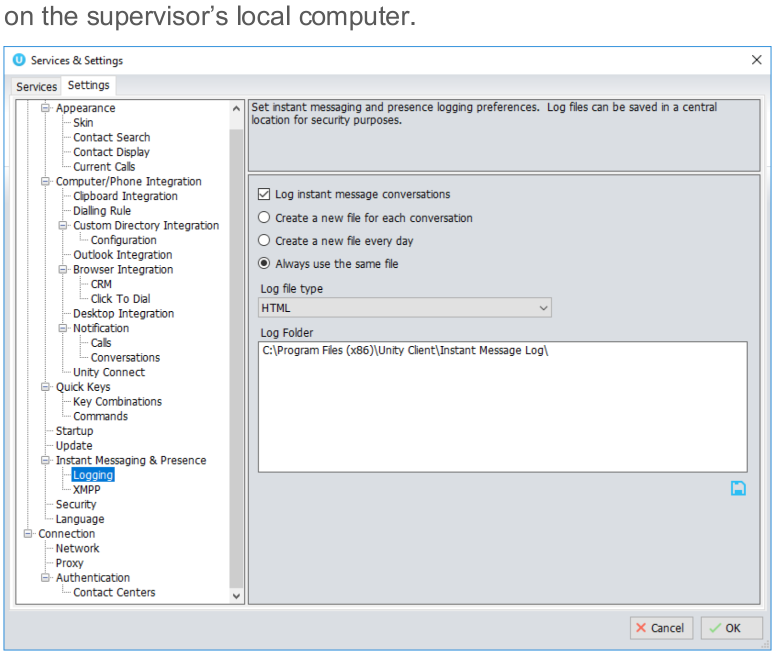


11.9 Send IMs to Offline Users

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

11.9.1 Logging IM Sessions

You will find the Instant Messaging and presence logging options in the Settings tab. Here you will be able to configure how IMs are saved, what file type they are (CSV or HTML) and where they are saved, for example, you may want to save IM conversations on your server rather than on the supervisor's local computer.



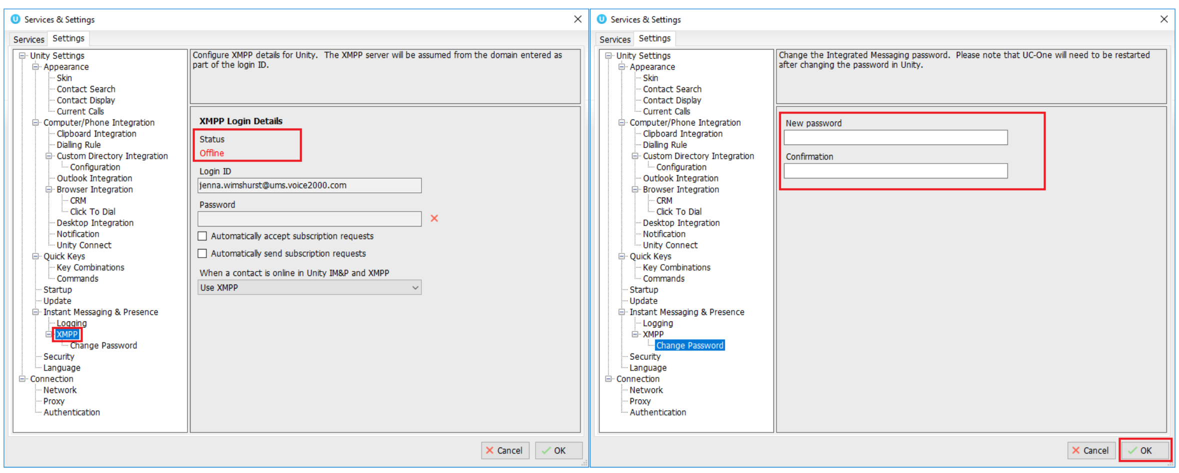
11.10 XMPP Integration

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

11.10.1 XMPP Authentication

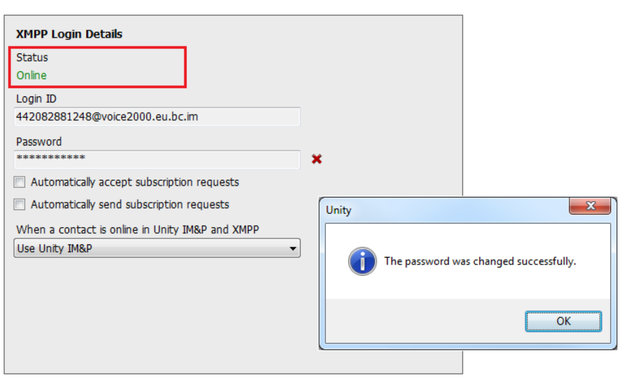
Unity is unable to extract the XMPP password from the VoIP platform, meaning it must be reset from within Unity. This functionality relies on the Integrated IM&P service being assigned to the receptionist, although no other UC-One related service need be assigned.

In order to set the XMPP password go into Settings and click on the "XMPP > Change Password" item. You can see the current XMPP status is offline in the example here:



Once the password has been entered you must click the OK button to save the password, before moving to any other panels in settings.

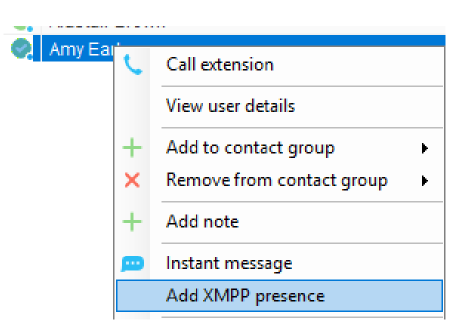
Please note that the XMPP password should not be the same as the password used to first log into Unity. You will be notified once the password has been changed and the XMPP status changed to online.

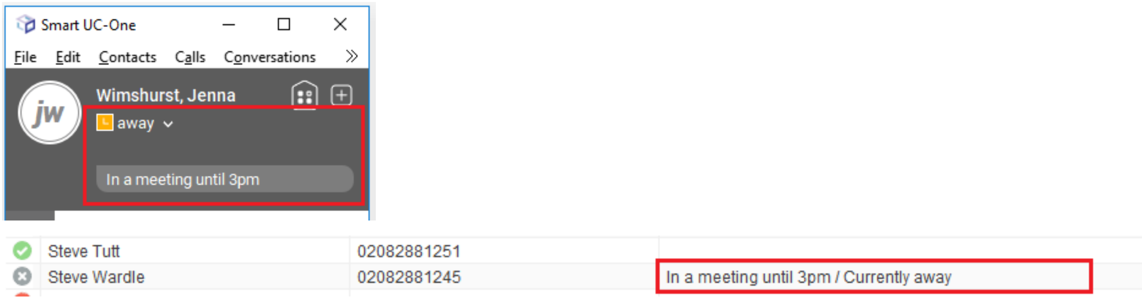


11.10.2 Managing XMPP Subscriptions

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

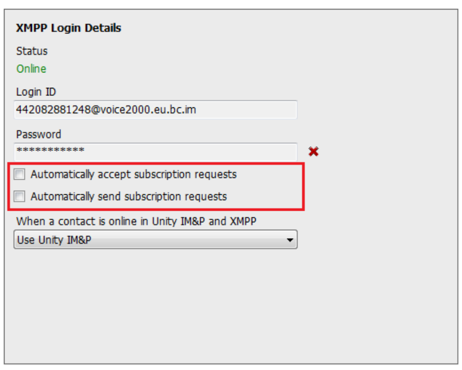
Unity will show the unavailable, busy etc status of the user, as well as any status message manually entered in UC-One.

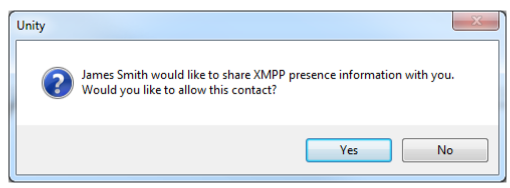


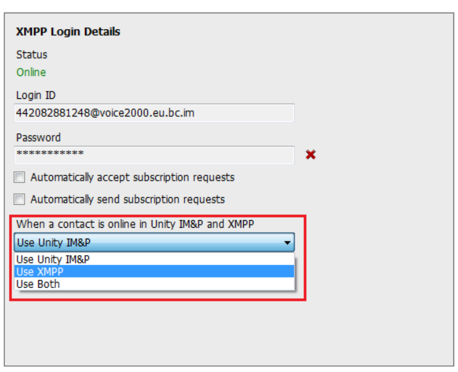


Please note that at present XMPP is only used by Unity to communicate with UC-One clients. Unity can be configured to automatically subscribe to all monitored user's XMPP presence, as shown here. However, this may result in the buddy/contact list in UC-One becoming exceptionally large so should only be activated if the receptionist does not often refer to the buddy list.

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







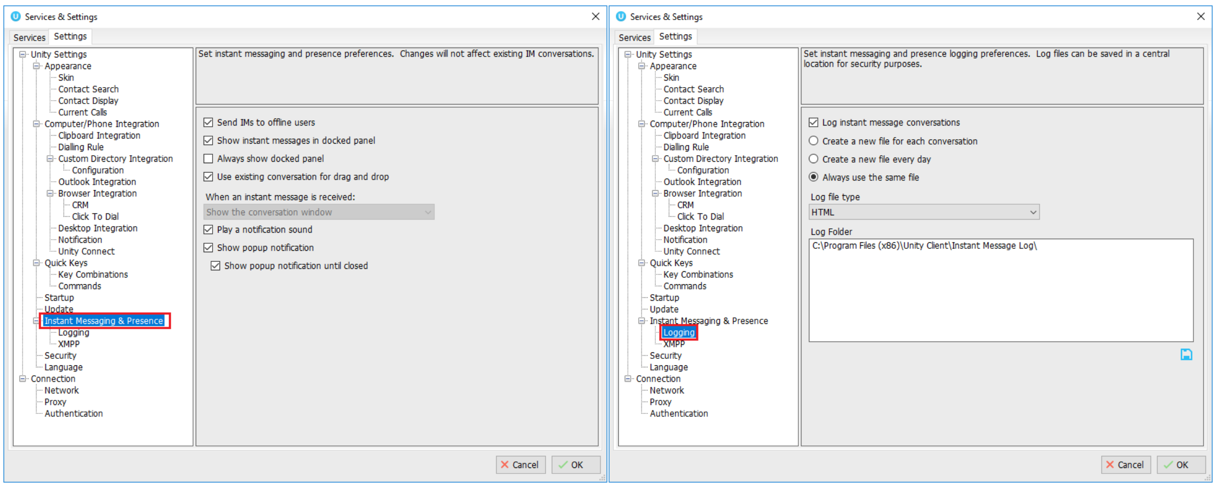
Unity can be configured to automatically generate an XMPP password the first time it is loaded. This is a branding property that is set in the Unity Client branding portal. In this case Unity will save the randomly generated password in BroadWorks and also in the registry, from where it will be used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

11.10.3 Instant Message Priority

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

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

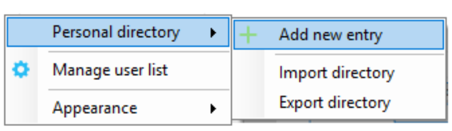
11.10.4 Configuration



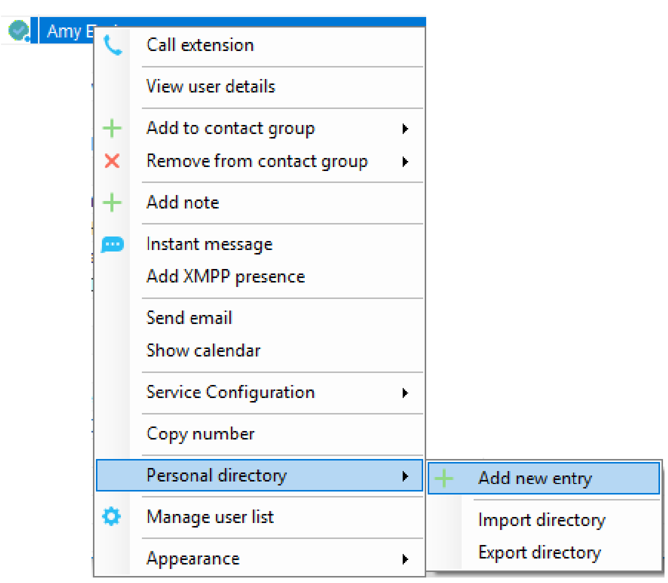
12 PERSONAL DIRECTORY

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

Personal Directory – Right click in Contacts

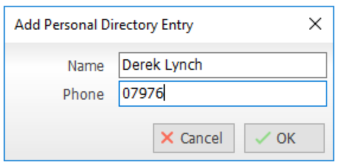


Personal Directory – Right click on monitored user

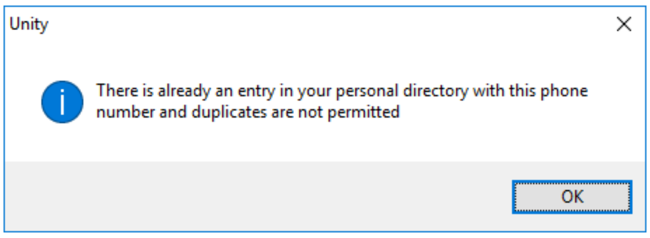


12.1 Add New Entry

Enter the Name and Number and click Ok

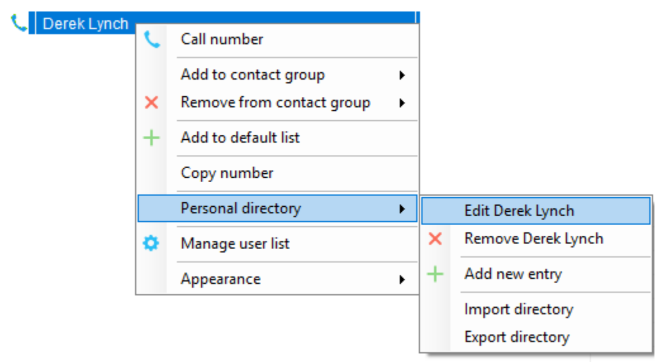


If the number specified is already in the Directory the user will be alerted as below.



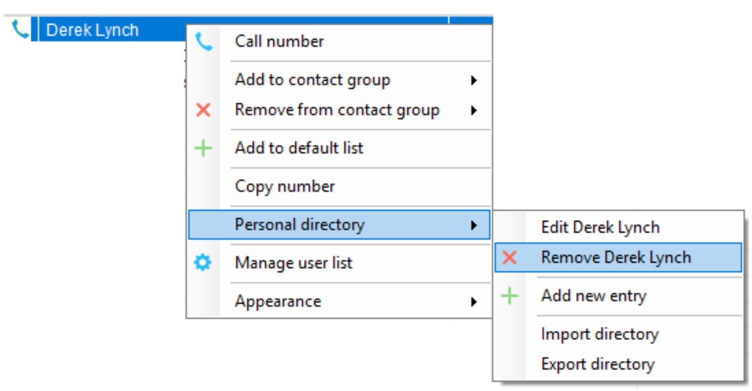
12.2 Edit Entry

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



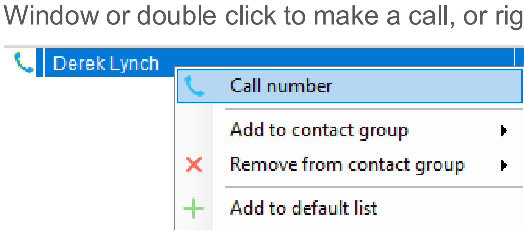
12.3 Remove Entry

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



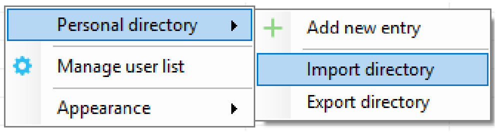
12.4 Dialling Directory Entry

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



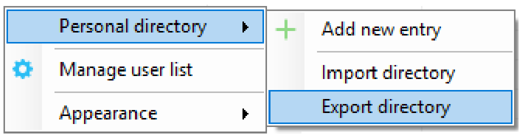
12.5 Import Personal Directory

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

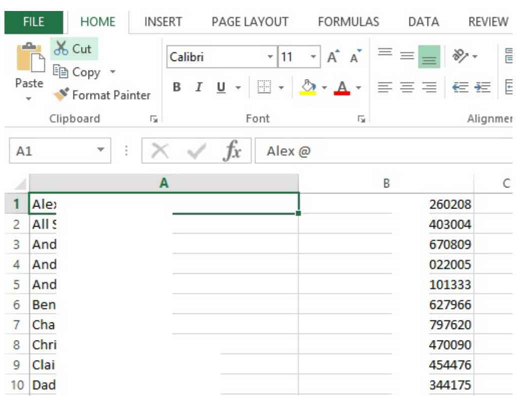


12.6 Export Personal Directory

To export Personal Directory entries right click in Contacts and select Personal directory > “export”. You will be prompted to save the file locally. The format is csv, and the default file name is PersonalDirectory.csv



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



13 CONTACT SEARCH DIRECTORIES

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

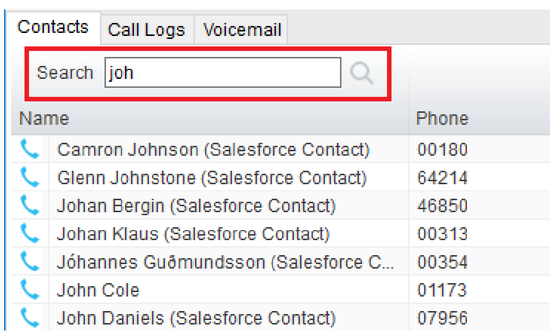
13.1 Loading Directories

Unity will load all directory entries into Contact Search on start. If users are added to the BroadWorks Group Directory while Unity is running, they will not be visible until Unity has restarted. Personal directory entries the user adds will be available to use immediately without restarting.

Please note: It is possible not to include the Common Phone List from the Group or Enterprise level when loading Unity, this is configured at the System Provider level of the Kakapo Partner Portal and will impact all users.

13.2 Contact Search Results Layout

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



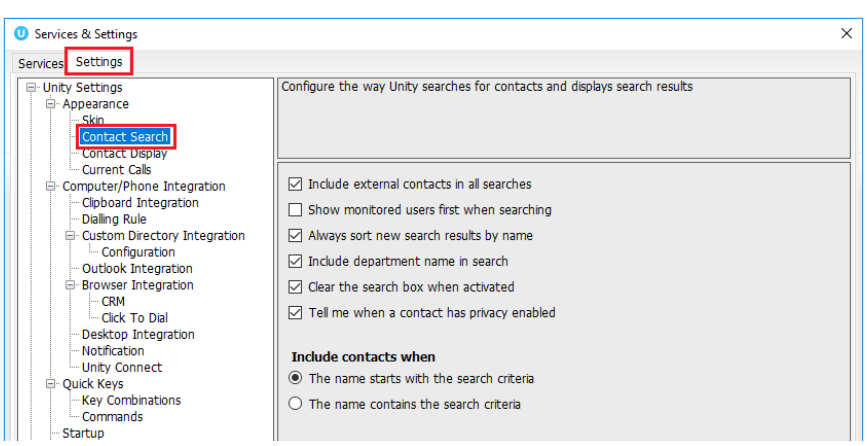
Search results will display each number for a contact as a separate line. Drag or double click the entry to make a call or right click to select a call action from the context menu.

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

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

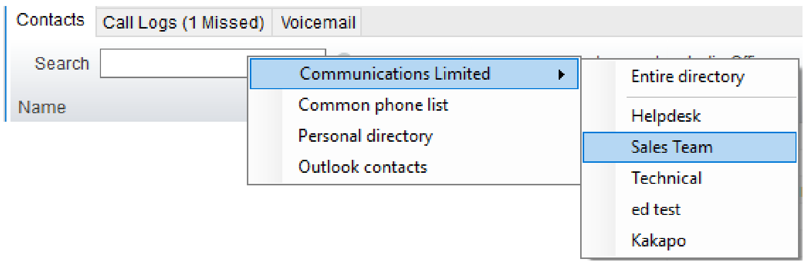
13.3 Contact Search Settings

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



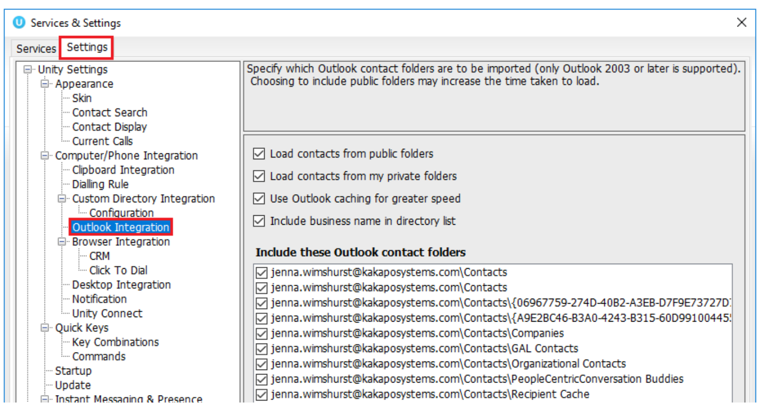
13.3.1 Listing Directories

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



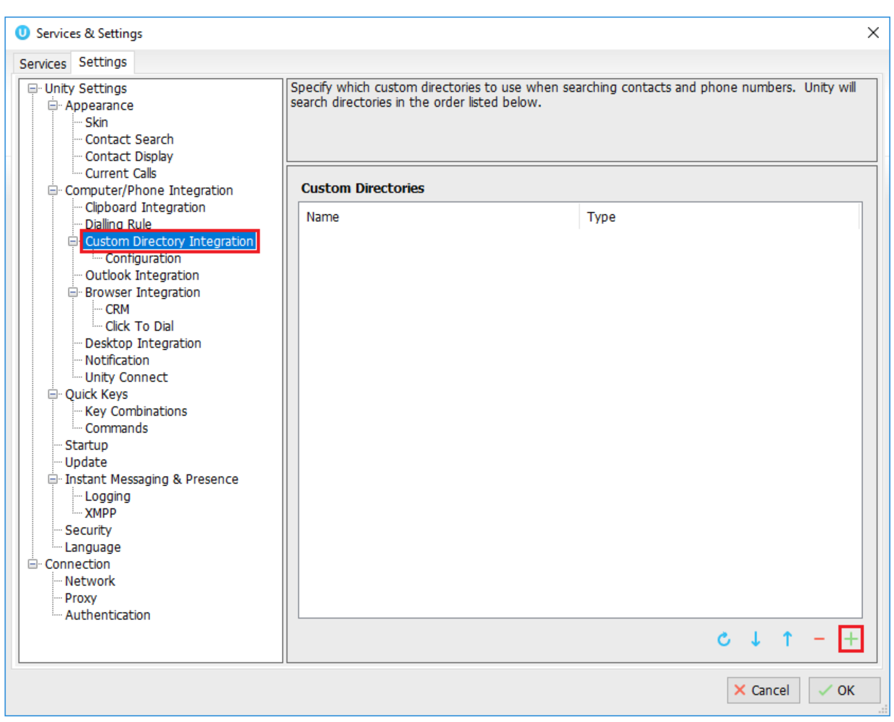
13.4 Configuring Outlook Contacts Preferences

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



13.5 Third Party Directories

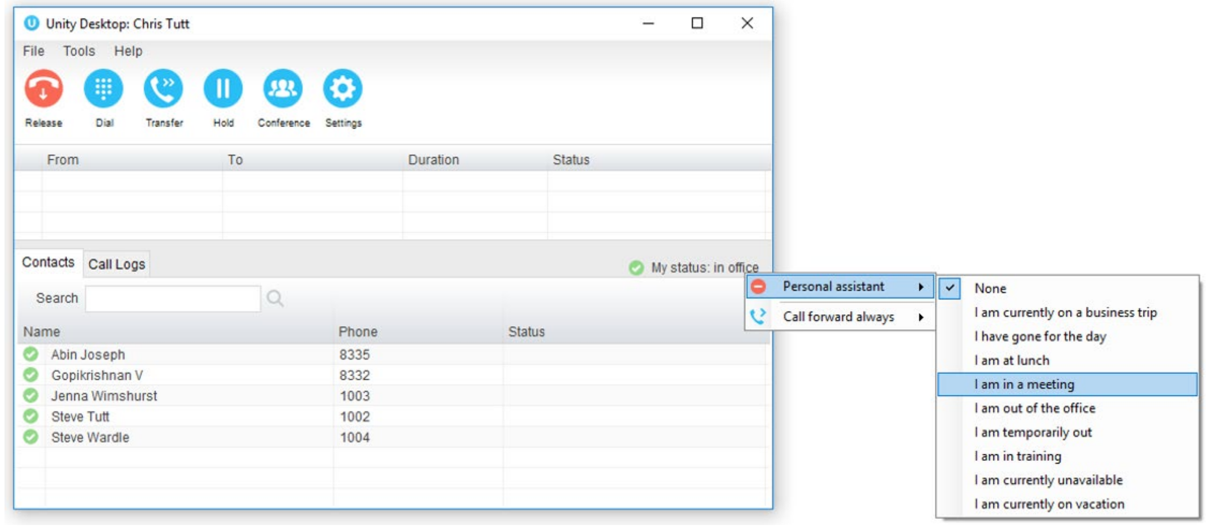
When searching BroadWorks and Outlook directories, Unity will dynamically match entries as keys are typed. For third party LDAP and SQL directories, because these are not loaded into Unity but polled each time a search request is made, search results are not listed until the Supervisor user has entered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



15.6 Personal Assistant Service

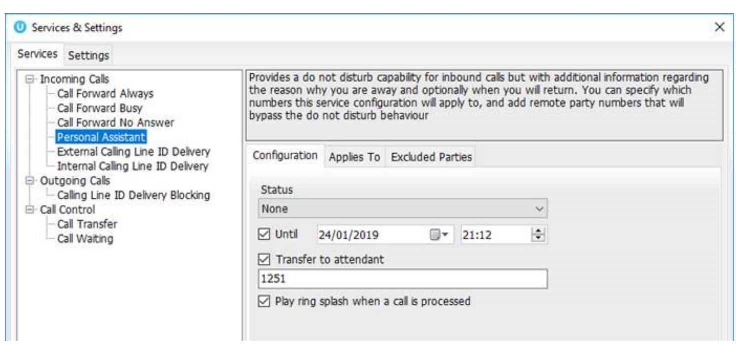
Note: The Personal Assistant status can only be displayed if the BroadWorks CTI protocol is being used.

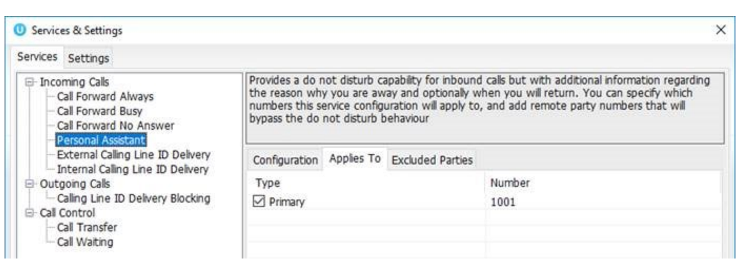
All Unity clients provide the ability to set the current status for the Personal Assistant service through the “My Status” quick access link, as shown below. This menu option is only shown if the service is assigned to the user in BroadWorks.

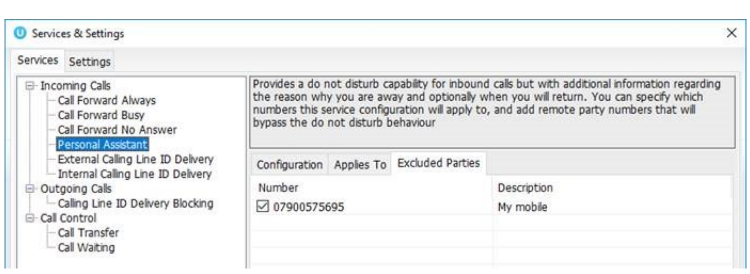


If the user selects a status from the My Status quick link, then an expiry date/time will not be configured. If there is a status currently assigned with an expiry date/time, then this will be removed. This is for users to quickly set a status “until further notice”.

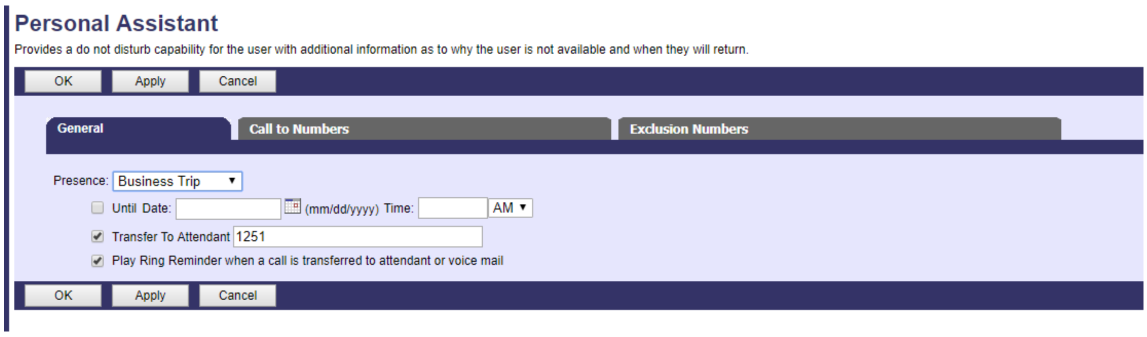
If a user wants to set an expiry date/time for the status then this can be done through Unity Settings, as shown below. The user can configure all aspects of the service here, including setting the assigned numbers that the status will apply to, and any exclusion numbers that will bypass this service (meaning if there is a status set but a call is received from an exclusion number, then it will be routed to the user rather than caught and processed by the service.)



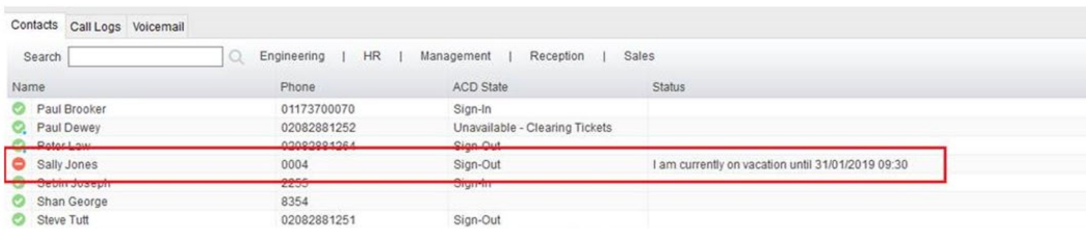




These settings map directly to the service configuration pages in the BroadWorks portal.



Only Unity Reception clients will show the Personal Assistant status of other users in the group or enterprise, as shown below.



Unity will show the state and the expiry date/time if one was set, the available status messages are:

- I am currently on a business trip
- I have gone for the day
- I am at lunch
- I am in a meeting
- I am out of the office
- I am temporarily out
- I am in training
- I am currently unavailable
- I am currently on vacation

The Do Not Disturb image will always be shown for that user when a Personal Assistant status is set, because this service is an extension of DND.