AGENT APP HELP GUIDE V8.X

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1 ABOUT UNITY AGENT

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

1.1 Features

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

- Agent state [available, unavailable, wrap-up]
- Joining & leaving call centers

- Statistics for all queues that the agent is a member of [the agent's own stats and summary queue stats such as calls in queue]
- Callback abandoned calls. Call center abandoned call remote numbers can be assigned by Unity Supervisor for Unity Agent to click-to-dial and marked as Processed.
- Unity Connect API integration with third party database applications

The current version can be found in Help > About Unity



1.2 Naming Conventions for this Help

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

1.3 System Requirements

1.3.1 Windows PC Requirements

- a. Unity will require approx 500MB of hard drive space on the local machine
- b. By default the install directory is C:\Program Files (x86)\Unity Client
- c. Minimum computer spec: CPU: dual core 3Ghz. Ram: 4GB. Video Card: 256MB onboard RAM. As a general note, the requirements to run Unity Agent are considerably less than those required to run Windows
- d. Unity can be rolled out as an MSI file, which supports Active Directory group profiles
- e. Unity is only supported on Windows 8.1 and Windows 10
- f. Both 32 and 64-bit versions of Windows are supported. There are no special permissions required to install Unity

1.3.2 Internet & Firewall

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

- a. TCP port 2208 to im.unityclient.com
- b. TCP port 2208 to the VoIP platform OCI server
- c. HTTP/HTTPS access to portal.unityclient.com
- d. HTTP/HTTPS access to the VoIP platform XSI server [if call recording, visual voicemail or enhanced call center reports are used]

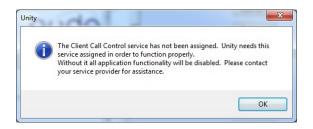
1.3.3 BroadWorks Platform Requirements

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

1.3.4 BroadWorks License and Service Requirements

Client Call Control

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



Internal calling line ID delivery & external calling line ID delivery

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



Call Transfer

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



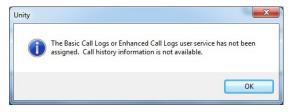
Three-Way Call or N-Way Call

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

Unity		×
i	The Three-Way Call user service has not been assigned. conference calling will not be available.	Without it
		ОК

Basic Call Logs or Enhanced Call Logs

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



2 INITIAL SETUP

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

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

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

Server address	
1	
Server port	
2208	
Unity Server Connection Details	
Unity Server Connection Details Server address:	
Server address:	
Server address: im.unityclient.com	

Restart Unity Agent to begin.

2.1 Call Center Login Details

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

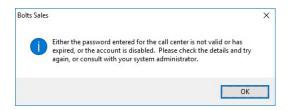
- Appearance	^	Specify contact center authentication details. All login ids and passwords are case sensitive and
- Skin - Contact Search - Contact Display - Current Calls		each login id must include the domain.
Computer/Phone Integration Clipboard Integration Dialling Rule Custom Directory Integration		Default password
Configuration		Contact Center Login Details
Outlook Integration Growser Integration CRM Click To Dial Desktop Integration Outlingtion		✓ Bolts Sales ✓ Kakapo Systems ✓ Nuts Sales
Calls Conversations Unity Connect		
Key Combinations Commands		
- Startup - Update		
Instant Messaging & Presence Logging XMPP		
- Security		
Language Connection		
Network		
- Proxy		
- Authentication Contact Centers		Alert me when a contact center login fails

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

will now login as the call center queues and you will see these begin to populate the Personal Wallboard.

Service ID	
boltssales@drd.co.uk	
Password	
Login status	
The password has not been entered.	

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



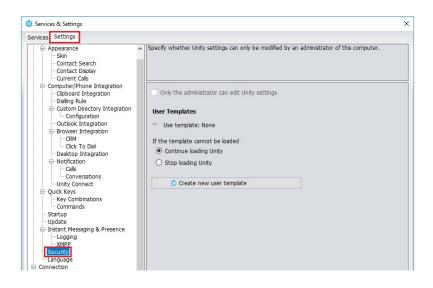
2.2 Call Center Login Default Password

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

O Services & Settings		×
Services Settings		
Appearance Skin Contact Search Contact Display Current Calls	 Specify contact center authentication details. All login ids and passwords are case sensitive and each login id must include the domain. 	
Computer/Phone Integration Clpboard Integration Dialing Rule Custom Directory Integration	Default password	
- Configuration	Contact Center Login Details	
Outlook Integration Order Service Integration Order To Dal Order To Dal	 ✓ Bolts Sales ✓ Kakapo Systems ✓ Nuts Sales 	
- Network		
Proxy Authentication 	☐ Alert me when a contact center login fails	
	× Cancel	к

2.3 Selecting a Pre-Configured Template

User templates can only be created by an administrator to configure default settings for agents. ACD buttons, call center control, recording options and all other settings can be configured and saved as a template that can be easily assigned to all users. Please see your Administrator for a separate guide on using Unity Templates.



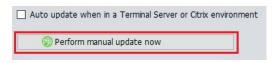
2.4 Manual and Auto Updates

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

U Services & Settings	×
Services Settings Appearance Skin Contact Search C	Configure Unity to automatically update periodically. Auto update Unity Check for updates every Auto update severy Automatically restart after update Auto update when in a Terminal Server or Citrix environment Perform manual update now Rollback Versions available Rollback

When a new version of Unity is available the user will be presented with a popup asking to restart Unity. Once Unity has restarted the latest version will be running. You can also configure how often Unity looks for updates under the auto update box.

To manually update Unity, click Perform manual update now and Unity will search for any new updates.



2.5 Rollback available

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

Rollback	
Versions available	
~	Rollback

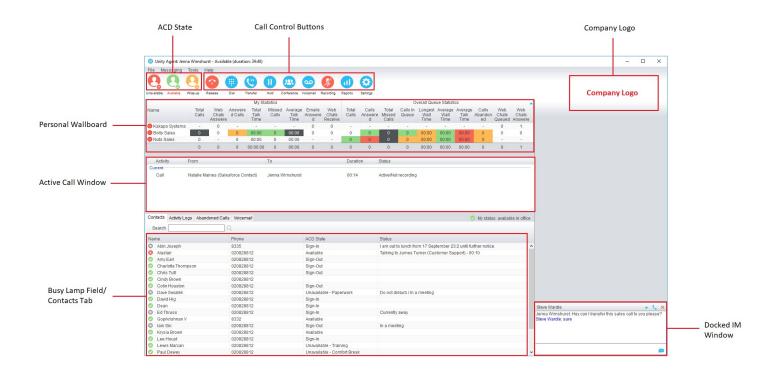
Once you've selected which version you want to rollback to click the green tick and the box below will appear.

Unity		×
? Are you su	re you want to rollback to ve	rsion 6.7.5.0?

Click Yes and then click Ok.

3 UNITY AGENT INTERFACE OVERVIEW

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



3.1 Resizing Unity Agent

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

3.2 Maximising and Minimising

Unity can be maximised and minimised using the standard buttons in the top right hand corner of the application. When minimised, Unity appears in the system tray in the bottom right hand corner

of the desktop where the Unity icon ⁽⁰⁾ will be displayed. To re-open Unity simply double click this icon, or right click and select Restore from the menu, as shown below.

	Close	
	Restart	
	Restore	
٥	Settings	
	Contacts	
	Call Logs	
C	Call number	×
	Change my status	•
	ACD State	•
		\sim

3.3 Using Unity Agent from the System Tray

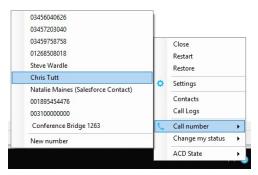
In its minimised state, Unity Agent can be configured to sit in the System Tray. This is in Settings [button] > Settings [tab] Appearance.

When minimised, place Unity in the	
System tray	
Itaskbar	

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

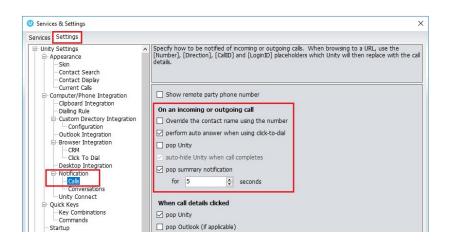
		0	Available: in office
	Close	0	Available: out of office
	Restart	0	Busy
	Restore	0	Unavailable
•	Settings	0	None
	Contacts	0	Do not disturb
	Call Logs	2	Call forward always
5	Dial number	+ e	Connect to a device
	Change my status	• [+	Remote Office +
	ACD State	t 🛛 🕻)) 9⊡ @ ENG 37/00/2010
	· · · · · · · · · · · · · · · · · · ·		27/09/201

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.



3.4 Call Notification Preferences

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



3.4.1 Show Remote Party Phone Number

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

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

3.4.2 Override Contact Name Using Number

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

3.5 Summary Toast Notification

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

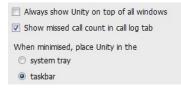


3.6 Browser Screen-Pop

The summary notification is also clickable and can be used to open the PC default browser to a preconfigured URL and append incoming call information, such as the phone number of the remote party. This feature can be used for screen popping CRM systems and other browser based applications. Further information on this feature is in a supplementary guide.

3.7 Appearance

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



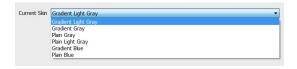
Always show on top of all windows – Unity will always be on top Show missed call count in the call log tab – When enabled Unity will provide a count of the number of missed calls as below



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

3.8 Skins

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



4 MAIN INTERFACE ELEMENTS

4.1 ACD State Buttons

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

4.2 Call Control

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

4.3 Active Call Window

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

4.4 Contacts [Busy Lamp Field]

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

4.5 Call Logs

Toggling the bottom Contacts panel to Call Logs will display Missed Calls, Received Calls and Dialled Calls. Missed Calls will include both direct inward DID calls, ACD and Hunt Group calls. 20 numbers can be stored unless the user has Enhanced Call Logs service assigned.

Call Logs can also be cleared, reloaded or exported with the icons at top right of the panel.

× C 🗋

4.6 Abandoned Calls

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

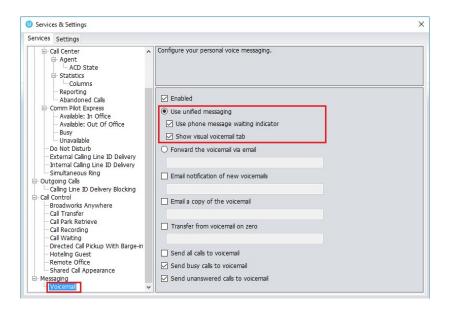
Contacts Call Logs Voicema	Abandoned Calls		
Call center All	~		
Call Date	Call Center	DNIS	Number
28/07/2016 11:56:17	Qudo Support		01244838
03/08/2016 11:00:44	Qudo Support		02086807
09/08/2016 16:55:21	Qudo Support		02085888

4.7 Voicemail

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

Search on name or	Contacts Call Logs (1 Misse Search	<u>୍</u>				mj	status: available in office × C 🗋	Refresh voicemail list, or save or delete selected items
	Call Date	Name	Phone Number		(Duration		
	06/04/2016 18:47:05	James Smith	1312			00:00:43		
	03/04/2016 18:43:22	Lewis Marcantonio	1265					
	26/02/2016 10:35:42	INDIA Conference Room	8330		Play			
	26/02/2016 10:34:56	INDIA Conference Room	8330		Save			
	22/02/2016 18:31:43	Hannah Carpenter (Business)	+44797066303	×	Delete			
	15/02/2016 16:10:15	Unavailable	Unavailable					
	15/02/2016 11:39:50	Parvathi M	8322	C	Call Copy number			Options when
			-		Reset column widths	s		right-clicking

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



5 CALL CENTER AGENT FUNCTIONALITY

5.1 Changing ACD State

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



5.1.1 Only Show One ACD Button

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

- Incoming Cals - Anonymous Cal Rejection - Cal Forward Always - Cal Forward Busy - Cal	ings such as ACD state.
Call Forward No Answer	
⊖- Call Center	ACD state
ACD State Not Set	~
Columns Post call ACD state	
- Reporting Not Set	~
Comm Pilot Express Desktop locked ACD state	
Available: In Office Available: Out Of Office	~
-Busy Wrap-up duration (sec) Unavailable 0	
Do Not Disturb External Calling Line ID Delivery Don't change my ACD star	e to Available until I assign a disposition code
Internal Collins Line ID Delivery	changing my ACD state when on a call center call.
Outgoing Calls	O state button
Calling Line ID Delivery Blocking	e when Unity is closing.
Broadworks Anywhere When displaying ACD state	
Call Transfer Call Park Retrieve Show duration	~
Call Recording Call Waiting	

5.1.2 Assigning Unavailable Codes

When the agent selects unavailable, any unavailable codes that have been configured in BroadWorks will appear. Unavailable Code assignment with one ACD button:



Unavailable Code assignment with three ACD buttons:



5.1.3 Force Disposition Code

To assign a Disposition Code the agent right clicks in the Active Call Window. Unity can force the agent to enter a disposition code by setting their ACD state post-call to Wrap-Up ACD state. When Unity is configured to force the agent to assign a disposition code through a popup window which is automatically displayed to the user when the call is released.

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

rvices Settings	
- Anonymous Call Rejection - Call Forward Always - Call Forward Busy - Call Forward No Answer	Configure cal center agent settings such as ACD state.
🖶 Call Center	Startup & desktop unlocked ACD state
ACD State	Not Set ~
Call Center Monitoring	Post call ACD state
Statistics	Not Set 🗸
Columns Threshold Alerts	Desktop locked ACD state
Reporting	
Abandoned Calls	Not Set ~
Comm Pilot Express	Wrap-up duration (sec)
- Available: In Office	0
- Available: Out Of Office	Force me to assign a disposition code
Unavailable	for 20 seconds
Do Not Disturb	
External Caling Line ID Delivery	Prevent me from manually changing my ACD state when on a call center call.
- Internal Calling Line ID Delivery	Only show the current ACD state button
- Simultaneous Ring Outgoing Calls	Activate sign-out ACD state when Unity is closing.
Caling Line ID Delivery Blocking	Activate sign-out ACD state when onity is closing.
- Call Control	When displaying ACD state
Broadworks Anywhere Call Transfer	Show duration \checkmark
Call Park Retrieve	
Call Recording	

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

5.1.4 Displaying ACD State Duration

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

Unity Agent: Jenna Wimshurst - Unavailable - Comfort Break (duration: 00:08)

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

Incoming Cals Anonymous Call Rejection Call Forward Always Call Forward No Answer Call Forward No Answer Call Center Startsup & desktop unlocked ACD state Startsup & desktop unlocked ACD state Startsup & desktop unlocked ACD state Not Set Set Comm Plot Express Available: no Office Available: no Office Lusy Unavailable Do Hot Disturb External Caling Line ID Delivery Internal Caling Line ID Delivery Simultaneous Ring Si	
Outgoing Calls Only show the current ACD state button Calling Line ID Delivery Blocking	call.
□- Call Control	
Broadworks Anywhere Broadworks Mobility When displaying ACD state	
Call Transfer Show duration	
Call Park Retrieve	
Call Recording	

5.2 Using Personal Wallboard

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

Maximized View

				My Sta	atistics				Overall Queue Statistics									
Name	Total Calls	Web Chats Answere	Answere d Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answere d	Web Chats Receive	Total Calls	Calls Answere d	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Calls Abandon ed		Web Chats Answere
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	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 Answere	Answere d Calls	Total Talk Time	Missed Calls	Average Talk Time	Emails Answere d	Web Chats Receive	Total Calls	Calls Answere d	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Abandon		Web Chats Answere
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.

5.2.1 Locking in Minimized State

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

ervices Settings	
errices [settings] Incoming Calls Anonymous Call Rejection Call Forward Always Call Forward Busys Call Center Call Center Call Center Call Center Call Center Call Control Call Control Call Center Call Cent	Configure call center statistics delivery. Call center passwords (required to gather statistics can be entered in the Authentication secton. The Clent Call Control service must be assigned to the call center if real-time statistics are required. Refresh frequency (seconds) 90 90 Image: Image

5.2.2 Configuring Statistics Columns in Personal Wallboard

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

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

vices Settings			
Incoming Calls Anonymous Call Rejection Call Forward Always Call Forward Busy Call Forward No Answer	 Specify which co set for many col 	lumns should be displayed in the personal wallboard. Imns	Threshold values can also b
- Contact Center	Agent Columns	Contact Center Columns	
- Agent	Total Calls		
ACD State	Web Chats Ans	wered	
Statistics Columns	Answered Calls		
Reporting	Total Talk Time		
- Abandoned Calls	Missed Calls		
Comm Pilot Express	Average Talk T	me	
- Available: In Office	Emails Answere	d	
- Available: Out Of Office	Web Chats Rec	eived	
Busy 			
Do Not Disturb			
External Calling Line ID Delivery			
Internal Calling Line ID Delivery			
Simultaneous Ring			
Outgoing Calls			
Calling Line ID Delivery Blocking			
Call Control Broadworks Anywhere			
Broadworks Anywhere Broadworks Mobility			
- Call Transfer			
Call Park Retrieve			
Call Recording			
- Call Waiting			
 Flexible Seating Guest 			
- Hoteling Guest			1 1 - ·
- Remote Office Shared Call Appearance			
Shared Call Appearance	V		

5.2.3 Customizing Statistics Label

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

Statistic to displ	ау
NumberOfCallsA	bandoned
Column heading Abandoned	
Set threshold	l alert values
🔽 Highlight non	-zero values
🔽 Increasing th	resholds (calls)
Green: >=	1
Yellow: >=	2
Red: >=	5
Black: >=	10

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

Total Calls	Calls Answered	Total Missed Calls
0	0	0
0	0	0
6	6	0
6	6	0

5.2.4 Configuring Alert Thresholds in Personal Wallboard

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

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

Busy	ervices Settings						
Agort AD State Additional Cals Column heading Abandoned Column heading Abandoned Column heading Abandoned Column heading Column heading Abandoned Column heading Column heading Column heading Column heading Abandoned Column heading Colum	Anonymous Call Rejection Call Forward Always Call Forward Busy	^	Specify which columns should be displayed also be set for many columns	d in the personal wallb	oard. Th	reshold va	alues ca
Statistics Column heading Abandoned Calls Column heading Available: In Office Abandoned Available: In Office Column heading Available: Out of Office Call Center Available: Out of Office Bots Sales Do hot Disturb Call Center Calling Line ID Delvery Internal Caling Line ID Delvery Calling Line ID Delvery Blocking Image: Call Center Call Center Image: Call Center	🖨-Agent		Statistic to display				
Column heading Abandoned Cals Abandoned Cals Abandoned Abandoned Abandoned Abandoned Abandoned Busy Available: No Office - Available: No Office - Busy Unavailable Do Not Disturb - Do Not Disturb - External Caling Line ID Delivery - Simultaneous Ring Outgoing Calls - Calling Line ID Delivery Blocking - Broadworks Mobility - Broadworks Mobility - Call Transfer			NumberOfCallsAbandoned	•			
Abandoned Cals Abandoned Cals Comm Pict Express Available: In Office Available: In Office Busy Unavailable Do Not Disturb Do Not Disturb Call Calling Line ID Delivery Simultaneous Ring Outgoing Calli Calling Line ID Delivery Broadworks Monitry Broadworks Monitry Call Transfer	I Columns		Column heading				
Control Learness Available: In Office Busy Available: Out of Office Busy Dut of bother Dut			Abandoned				
Avalable: In Office Avalable: Out of office Busy Unavalable Do Not Disturb External Caling Line ID Delivery Internal Caling Line ID Delivery Internal Caling Line ID Delivery Gali Control Broadworks Anywhere Broadworks Mobility Cali Tarsfer			Set threshold alert values				
Available: Out or Ortice Busy Description of the second s	- Available: In Office	н		_			
Dusy Unavailable Unavailable Unavailable Unavailable Do Not Disturb Determal Caling Line ID Delivery Instrutioneus Rng Outgoing Cali Cali Touris Broadworks Mobility - Cali Transfer				5	10	15	20
Do Not Disturb External Caling Line ID Delivery Internal Caling Line ID Delivery Simultaneous Ring Outoping Calls Callog Line ID Delivery Blocking Gal Control Broadworks Mobility Call Transfer							10
Internal Caling Line ID Delivery Simultaneous Ring Outgoing Caling Line ID Delivery Blocking Call Control Broadworks Anywhere Broadworks Mobility Call Transfer				-	2	5	10
Call Fundamenus Ring Outpoing Calls Calling Line 1D Delivery Blocking Call Control Broadworks Anywhere Broadworks Mobility Call Transfer	- External Calling Line ID Delivery						
Outgoing Calls Calling Line ID Delivery Blocking Call Control Broadworks Anywhere Broadworks Mobility Call Transfer							
Cal Tansfer							
Cal Control Broadworks Anywhere Broadworks Mobility Cal Transfer							
Broadworks Mobility Call Transfer							
- Call Transfer	- Broadworks Anywhere						
Call Park Retrieve							

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

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

5.3 Joining & Leaving Queues

Right click any queue in the Personal Wallboard to toggle between Join and Leave queue. Queues that you are joined to have a green icon next to them. A red icon indicates that you are not joined to that queue.

Name	Total Calls	Answered Calls
Bolts Sales Nuts Sales	Call queue	4
O INUIS Gales	Join queue	
-	Remove from person	al wallboard
C	Refresh statistics	

5.4 Receiving ACD Calls

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

File Messaging	Tools H	Help				~		•		~				
	6	0		C I		B	e	14		\odot				
Inavailable Available	Wrap-up	Answer	Dial	Transfer	Hold	Conference	Voicemail	Recording	Reports	Settings				
				My St	atistics							0	verall Qu	aur
Name	Total Calls	Web Chats Answere	Answere d Calls	Total Talk Time	Missed Calls	Average Talk Time	e Emails Answere d	Web Chats Receive	Total Calls	Calls Answere d	Total Missed Calls	Calls In Queue	Longest Wait Time	1
Kakapo Systems	-	0	-	-	-	-	0	0	-	-	-	-	-	
Bolts Sales	0	0	0	00:00	0	00:00	0	0	0	0	0	1	00:00	
Nuts Sales	0	- ·	0	00:00	0	00:00	-	-	0	0	0	0	00:00	
	0	0	0	00:00:00	0	00:00	0	0	0	0	0	1	00:00	
Activity	From				То				Durat	on	Status			
Activity Queued	From				To				Durat	on	Status			
Call	Natalie M	aines (Sale	sforce Co	ontact)	Bolts S	ales			00:00		Ringing			1

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

5.5 Using Disposition Codes

Unity will expose ACD Disposition Codes as configured in BroadWorks, to agents 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 agent has answered are displayed.

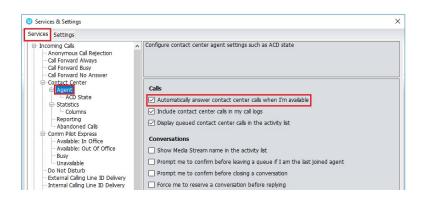
From		То	Duration			Status			Notes
Natalie Maines (Salesforce Contac	t)	Bolts Sales	00:18		2	Active - Not reco	rding	1	
		Assign call to account code		•					
	+	Add number to personal dire	ectory						
		Add call note							
		Show CRM contact Add CRM call log entry			-				
Contacts Call Logs Voicemail		Escalate to first supervisor							📀 My status: availabl
Search		Instant conference/emergen	icy escalate to first supervisor		office	London Off	ice	New York	Office
lame		Supervisors		•		Status			
		Assign disposition code		٠	S	elected call 🔹 🕨		1 Call from R	eseller
		Reset column widths						2 Call from D	irect customer
	~	Show gridlines						3 Call for oth	er member of staff
								4 Cold Call	
								5 Did not add	l a code
								Existing Cust	omer
								New Custom	er

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

From		То		Duration	Status	Notes
		Assign disposition code	Last call betwe	een Bolts Sales Natalie Maine	es (Salesforce Contact)	1 Call from Reseller
	~	Reset column widths Show gridlines				2 Call from Direct customer 3 Call for other member of staff 4 Cold Call
						5 Did not add a code Existing Customer New Customer

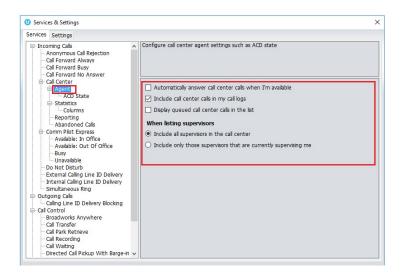
5.6 Auto Answer

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



5.7 Supervisor Escalation

Unity Call Center Agent facilitates the BroadWorks call center escalation feature by allowing both standard and emergency call escalation. Both types of escalation can only be performed on call center calls and both inbound and outbound [DNIS] calls are supported. In either case, an agent can only escalate a call to a supervisor if that supervisor is currently supervising the agent in BroadWorks. If this is not the case the agent will be told [through the phone] that the supervisor is not a valid supervisor. However, Unity can be configured to display either only the supervisors that are supervising the agent, or all supervisors, as illustrated in the screenshot below.



5.7.1 Standard Escalation

Standard escalation is used when the agent needs to be given information or instruction from the supervisor without conferencing in the remote party. Typically, the agent will release the call to the supervisor and replay the information to the remote party. Unity allows the call to be escalated to a specific supervisor or to the first supervisor that is available. The agent's Unity client will automatically place the ACD call on hold, then dial the extension of the supervisor as an escalated call. This call will then appear as an escalated call in all center reports. Standard call policy/routing rules will be used when calling the supervisor, such as DND, call forwarding and hoteling guest etc. At any time, the agent can release the escalated call, or can transfer or conference both calls together if required.

5.7.2 Emergency Escalation

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

5.7.3 Escalation via Active Call Window

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

From			То	Duratio	n S	Status		Notes
Natali	ie Maines (S		Assign call to account code	•)	Active - N	lot recording	
		+	Add number to personal directory					
			Add call note	-				
			Show CRM contact Add CRM call log entry					
	Call Logs		Escalate to first supervisor Instant conference/emergency escalate to first superviso	ır	Office LAoffice	l lon	don Office I New Y	My status: availat fork Office
Search			Supervisors	•	Amy Earl	•	don onice New f	ork onice
Name			Assign disposition code	•	Chris Tutt	•	Call/escalate	
			Reset column widths		Dashboard User	•	Instant conference	e/emergency escalate
		~	Show gridlines		Conference Phone Ed	•	🙄 Transfer call to ext	tension
					Eq Gopikrishnan V		👝 Instant message	
					lain Sin			
					Sally Jones	•		
					Sebin Joseph	•		
					Steve Tutt	•		
					Steve Wardle	+		

Or escalates the call to the first available supervisor.

From		To Date Cales	
Natalie Maines (Salesfor		Assign call to account code	•
	+	Add number to personal directory	
Contacts Call Logs Voicer	1	Show CRM contact Add CRM call log entry	
Search		Escalate to first supervisor	
Search		Instant conference/emergency escalate to first supervisor	
Name		Supervisors	•
		Assign disposition code	•
	_	Reset column widths	
	~	Show gridlines	

5.7.4 Escalation via Personal Wallboard

The agent 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.

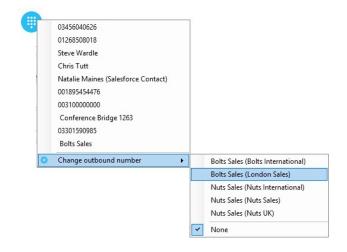
Boits Sale Call queue 0 00:00 0 0 0 Kakapo (Kakapo	е		Total Calls Answered Calls Time	M	issed Calls	Time	Answere	d Received	Total Calls	Answered	Ca
Arange Nuts Sai Transfer call to queue 0 00:00 - 0 Activity Escalate to first supervisor Instant conference/emergency escalate to first supervisor 0 00:00 0 0 Supervisors Instant conference/emergency escalate to first supervisor 0 00:08 Active - Not recording Supervisors Active - Not recording Argun Harikumar Argun Harikumar Argun Harikumar X Remove from personal wallboard Chris Tutt Call/escalate Dashboard User Conference Phone Ed Thrus Gopikrishnan V Instant message Iain Sin Sally Jones				^	0	00:00			0	0	. (
Activity Leave Queue 0 00:00 0 0 0 Activity Escalate to first supervisor Duration Status Call Supervisors 0 0:00 0 0 X Remove from personal wallboard Argun Harikumar Argun Harikumar Show gridlines Call/escalate Dashboard User Instant conference Lativity Kennove from personal wallboard Lativity Call/escalate					-		0	0		-	
Activity Current Call Call Call Refresh statistics Current Call Remove from personal wallboard Show gridlines Call/escalate Conference Phone Ed Thrus Sally Jones Call/escalate Call/escalate Conference Phone Ed Thrus Sally Jones Call/escalate Conference Phone Conference Phone	uts Sal		Iransfer call to queue		0	00:00	-	-	0	0	
Addivity Duration Status Current Escalate to first supervisor 00:08 Active - Not recording Instant conference/emergency escalate to first supervisor Amy Earl Adjun Harikumar X Remove from personal wallboard Any Earl Show gridlines Chris Tutt Call/escalate Dashboard User Instant conference Conference Phone Ed Thrus Ed Thrus Instant message Jain Sin Jain Sin Sally Jones Sally Jones		•	Leave Queue		0	00:00	0	0	0	0	
Current Call	Activity	C	Refresh statistics				Duration	Status			
Call Instant conference/emergency escalate to first supervisor 00:08 Active - Not recording Supervisors Arny Earl Arjun Harikumar Arjun Harikumar X Remove from personal wallboard Chris Tutt Call/escalate Show gridlines Dashboard User Instant conference Conference Phone Ed Thrus Instant conference Iain Sin Sally Jones Instant message			Escalate to first supervisor				Duration	Ototoo			
Remove from personal wallboard Arjun Harikumar Show gridlines Chris Tutt Dashboard User Instant conference Conference Phone C Ed Thrus Instant message Iain Sin Sally Jones	2.032						00:08	Active - No	t recording		
Chris Tutt Call/escalate Show gridlines Dashboard User Instant conference Conference Phone Ed Thrus Transfer call to exter Ed Thrus Instant message Instant message Iain Sin Sally Jones Sally Jones			Supervisors	•	Amy	Earl	•	1			
Show gridlines Dashboard User Instant conference Conference Phone Ed Thrus Gopikrishnan V Iain Sin Sin Sally Jones I		×	Remove from personal wallboard		Arju	n Harikumar	•				
Dashboard User > Instant conference Conference Phone Ed Thrus Conference Phone Ed Thrus Conference Phone Ed Thrus Copficishnan V Iain Sin Sally Jones S			Show aridlines		Chris	Tutt	•	Call/esc	alate		
Ed Thrus Gopikrishnan V Iain Sin Sally Jones		-	Short ghomes		Dash	board User	•	Instant	onference/em	ergency escalat	e
Gopikrishnan V s instant message Iain Sin s Sally Jones s							ne 🕨	🕲 Transfer	call to extension	n	
lain Sin > Sally Jones >					Ed T	hrus	•	- Instant			
Sally Jones					Gopikrishnan V 🕨			instant i	nessage		
					lain S	Sin	•				
Sebin Joseph 🕨					Sally	Jones	•				
					Sebir	n Joseph	•				
Steve Tutt					Steve	Tutt					
Steve Wardle											

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

5.8 Activating Outbound DNIS

If the agent 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 agent 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.



5.9 Personal Statistical Reports

Unity Agent provides access to the following agent reports:

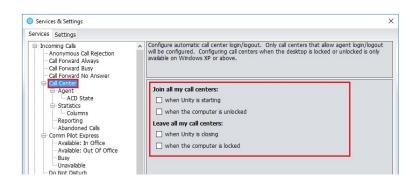
- 1. Agent Activity Detail Report
- 2. Agent Activity Report
- 3. Agent Call By Skill report
- 4. Agent Call Detail Report
- 5. Agent Call Report
- 6. Agent Duration by Skill Report
- 7. Agent Duration Report
- 8. Agent Sign-In/Sign-Out Report

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

Report Viewer	- 0	× U Report View	ewer –	- 🗆 ×
Report	Agent Activity Detail Report	~ Report	Agent Activity Detail Rep	ort ~
Start Period End Period Output Type	Thu, 13 Sep 00:00 Thu, 20 Sep * PDF X Cancel	 Start Period End Period Output Type 	Agent Activity Detail Rep Agent Activity Report Agent Call By Skil Report Agent Call Detail Report	eport eport nt is Stream ue Agent Media Stream Queue ry - Agent ry - Agent ry - Queue

5.10 Pre-configuration of ACD State

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



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

rvices Settings	
- Incoming Calls - Anonymous Call Rejection - Call Forward Always - Call Forward Busy - Call Forward Busy - Call Forward No Answer - Call Forward	Configure call center agent settings such as ACD state.
Call Center Agent	Startup & desktop unlocked ACD state
ACD State	Not Set
Statistics	
- Columns - Reporting	Post call ACD state
- Abandoned Calls	Not Set 🗸
Comm Pilot Express	Desktop locked ACD state
- Available: In Office	Not Set
- Available: Out Of Office	
- Busy Unavailable	Wrap-up duration (sec)
- Do Not Disturb	0
External Calling Line ID Delivery	Don't change my ACD state to Available until I assign a disposition code
Internal Calling Line ID Delivery	Prevent me from manually changing my ACD state when on a call center call.
Simultaneous Ring	Only show the current ACD state button
- Outgoing Calls - Caling Line ID Delivery Blocking	
Call Control	Activate sign-out ACD state when Unity is closing.
Broadworks Anywhere	When displaving ACD state
- Call Transfer	Show duration
- Call Park Retrieve	
Call Recording Call Waiting	
Directed Call Pickup With Barge-in	

6 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 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.

6.1 Making a Call

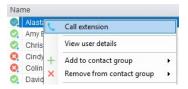
6.1.1 Using the Dial Window

Click the Dial button ⁽ⁱ⁾ 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.

ial		×
Number		
	× Cancel	✓ OK

6.1.2 Using the Contacts Panel

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



6.1.3 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.

6.1.4 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.

6.1.4 Dialling from the clipboard

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

6.2 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 Active Call Window 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.

6.3 End a Call

Click the Release button ⁽²⁾ to end the currently selected call. If there are multiple calls in the Active Call Window, make sure you select the right call before clicking Release.

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

6.3 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.

	Natalie Maines (Salesforce Contact)
	001895454476
	Chris Tutt
	003100000000
	Conference Bridge 1263
	03301590985
	Bolts Sales
	02086879234
	01892512909
	01444414002
•	Change outbound number

6.4 Send Call to Voicemail

To send an inbound caller directly to your voicemail click the Voicemail button ⁹⁹. Please note that if voicemail is not assigned or is disabled, the button will still be visible but inactive.

6.4.1 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

6.4.2 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, Agent must be configured for "Use unified messaging" and "Show visual voicemail tab" in Voicemail settings as below.

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

6.5 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.

6.5.1 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

			nsfer 0345604062 nsfer 012685080		to 01268508	018
		💘 Tra	nsfer calls toget	her	to number	
Name	Total Calls	An swereu Calls	Missed Calls	Totar Talk Time	Average Talk Time	Total Calls
Nuts Sales	0	0	0	00:00:00	00:00	0
Bolts Sales	4	4	0	00:01:09	00:18	4
	4	4	0	00:01:09	00:09	4
From			То		Du	ration
🕕 Jenna Wim	shurst		03456040	626	00	19
Jenna Wim	shurst		01268508	018	00	05

Example 1 – Transfer with two live calls

Example 2 – Transfer with four live calls

			Transfer 03456				9	
Name	Total Calls	A	Transfer 03455	9758758	to 03456 to 03459 to 03457	9758758	alls	F
Nuts Sales	0	0	0	00:00	to num	ber		
Bolts Sales	4	4	0	00:01:	09 00:1	8	4	
	4	4	0	00:01:	09 00:0	9	4	
From			То			Duration	1	_
🕕 Jenna Wirr	nshurst		034	56040626		01:37		
🕕 Jenna Wirr	nshurst		012	68508018		01:24		
 Jenna Wirr 	shurst		034	59758758		00:17		
S Jenna Wim	shurst		034	57203040		00:02		

6.5.1.1 Warm Transfer

Unity Agent allows you to warm transfer a call by right clicking the user you want to transfer the call to and selecting "warm transfer" from the context menu. This will then put the original caller

on hold and dial the selected number. When ready, click the transfer button in the call center control options panel and the two calls will be transferred, automatically disappearing from your active call window.

🔍 Trac	ey 🔒	Call extension
Stev	e V 🔪	Call extension
📀 Stev	e 1 🙄	Transfer call to extension
🔍 Pete	er L	Warm transfer call to extension
Pau	ID	
C Lew	is	Transfer to voicemail

6.5.2 Blind Transfer

6.5.2.1 Using Contacts Panel Drag and Drop

Unity Agent can be configured to automatically blind transfer a call by dragging the call from the Active Call Window and dropping it on a user icon or number icon in the Contacts panel, or dropping it onto a call center queue [if agent is configured as an agent with call center queues]. 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 8.

	Call extension
S S	Transfer call to extension
0 P	Warm transfer call to extension
P	Transfer to voicemail
Q L	Park call on extension

6.5.2.2 Using Transfer Button

Once on a call click the Transfer call control button ⁽²⁾. In the Transfer window enter the destination and click OK.

Dial	Transfer					•
		Hold	Conference	Voicemail	Recording	Settings
					То	
Vimshur	st				Sasha G	Gorb (+447976493816
Т	ransfer				×	
	Numbe		Cancal	OK		
1		Vimshurst Transfer Numbe	Transfer Number	Transfer	Transfer	/imshurst Sasha C

6.5.2.3 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.

Var	ne	Phone		
9	Ala	Call extension		
0	Am	Call extension		
0	Chr 🙄	Transfer call to extension		
0	Cin	Warm transfer call to extension		
9	Col	Transfer to voicemail		
0	Dav			
0	Dea	Park call on extension		
0	Ed	View user details		
0	Lee	view user details		

6.5.3 Transfer to Voicemail

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

6.5.3.1 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.

0	Trace	•	Call extension
0	Steve	~	carectersion
0	Steve	e	Transfer call to extension
Q.	Peter		Warm transfer call to extension
0	Paul C		Transfer to voicemail
0	Lewis		Transfer to voicemail
0	Lee H		Park call on extension
-			

6.5.3.2 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 8.

0	Tracey Scoate	02082881262
0	Steve W: 🗳	Transfer call to extension
0	Steve Tu	Transfer to voicemail
C.	Peter La	
0	Paul Dev	Park call on extension

6.5.4 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].

6.5.4.1 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.

6.5.4.2 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 8.

6.6 Call Hold/Retrieve

The Hold/Retrieve I 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.

00:04	On hold
00.01	Similar

6.6.1 Placing a Call on Hold

To place a current active call on Hold, press the red Hold button ¹. The call status will now show as on hold in the Active Call Window and there will be an On Hold icon alongside the call.

6.6.2 Retrieving a Held Call

Click the held call in the Active Call Window to select it. Click the Retrieve button \checkmark 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.

6.7 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.

6.7.1 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 ^(III) 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 ⁽²⁹⁾ 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	То	Duration	Status
522	Sasha Gorb	Jenna Wimshurst	00:15	Active (conference)/Not recording
522	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	То	Duration	Status
🕕 Sasha Gorb	Jenna Wimshurst	00:36	On hold (conference)
Jenna Wimshurst	01268508018	00:23	On hold (conference)

6.7.1.1 Adding Multiple Parties

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

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

From		То	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
		Do you want to add 03456040626 to the conference?		
ne				
	Sasha Gorb Jenna Wimshurst Jenna Wimshurst	Sasha Gorb Jenna Wimshurst Jenna Wimshurst Unity Itacts Call Logs Voice	Sasha Gorb Jenna Wimshurst 01268508018 Jenna Wimshurst 03456040626 Unity Xacts Call Logs Voice Ob you want to add 03456040626 to the conference? earch	Sasha Gorb Jenna Wimshurst 01:30 Jenna Wimshurst 01268508018 01:17 Jenna Wimshurst 03456040626 00:05 Unity X tacts Call Logs Voice earch

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].

6.7.2 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 ⁽¹⁾ 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.



6.7.3 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.

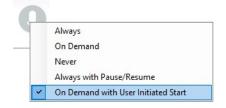


6.8 Call Recording

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

6.8.1 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	All calls are automatically recorded from the beginning of the call, but
Pause/Resume	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	Calls are not automatically recorded from the start, but recording can
Initiated Start	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.

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

7 ACTIVE CALL WINDOW

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

7.1 Window Layout

	From	То	Duration	Status
0	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 on On Hold status of each call.

Calls In Queue

Agents 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
chanolle Quality	Duits Sales	01.25	Queued at position 2

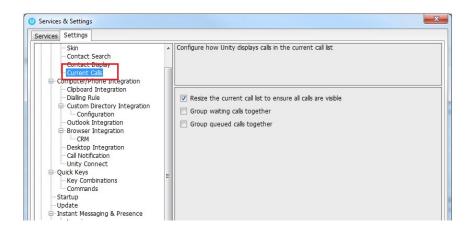
7.2 Managing Multiple Calls

To manage a particular call, first select it by clicking it in the Active Call Window. If there is only one call in the list it will be selected automatically. You can then use the call control buttons to perform different actions on the call. There is no limit to the number of calls that can be displayed in the Active Call Window, 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.

7.3 Resizing the Active Call Window

The bottom border of the Active Call Window 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.



7.4 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.

Fror	m			То			Duratio	on	Status
S Nata	alie Maines (S	alesforce C	ontact)	Jenna Wimshurs	t		00:10		Active
						Assign call to account code	•	Company B	
					+	Add number to personal directory		Company A	
	7					Show CRM contact Add CRM call log entry			
Contacts	s Call Logs	Voicemail	Abandoned Calls	Agent Activity		Add CRW can by entry			
Searc	:h		Q			Assign disposition code	•		
New				Dhana		Reset column widths			
Nar	me			Phone	~	Show gridlines			

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



8 DRAG AND DROP

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

8.1 Make a Call to a User or Number

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

8.2 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.

Services & Settings	
Services Settings	
Unity Settings Appearance Skin Contact Search Contact Display	Configure the way Unity displays contacts as well as drag & drop options
Current Calls Computer/Phone Integration Cipboard Integration Cipboard Integration Ciplaling Rule	Show call duration in contact list
Custom Directory Integration Configuration Outlook Integration	Menu options when a call is dragged over a contact Transfer call to extension
Browser Integration CRM	Transfer to voicemail
Click To Dial Desktop Integration	Transfer call to mobile Warm transfer call to extension
Unity Connect	Warm transfer call to mobile
	Park call on extension

8.3 Make a Call to a Call Center Queue

When agent 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.

8.4 Transferring a Call to a Call Center Queue

If agent 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.

8.5 Send to Voicemail

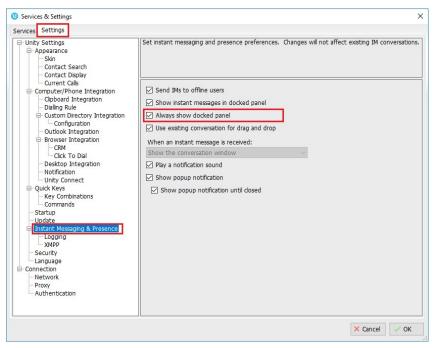
Dragging an unanswered call from the Active Call Window onto the Voicemail button ⁽²⁹⁾ will blind transfer the incoming call to your voicemail.

8.6 Call Control

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

8.7 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.



Steve		× V ×
	a Wimshurst: Hey can you take this sales Tutt: yes no problem	call please?
2	Transfer call to extension	
	Transfer to voicemail	ø
	Park call on extension	
C	Tate (Shints /	- (X
Jenna	Wimshurst: Hey when you're back Sally	wants to speak to you!
Jenna	Wimshurst Hey when you're back Sally	wants to speak to you!
	Wimshurst: Hey when you're back Sally otte Quartly, Amy Earl	wants to speak to you!
Charl Jenna Charlo		ه ۲ پ ۲

See also section 10 on Instant Messaging.

8.7.1 Add Participant to Existing IM Session

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

is Tutt	▲ Ç X
Add to the conversation	
Start a new conversation	

8.7.2 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.

David H	iggins	- (x
C	Transfer call to extension	
	Transfer call to mobile	
	Transfer to voicemail	
	Park call on extension	ø

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



9 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.

9.1 Contact Panel Display Options

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

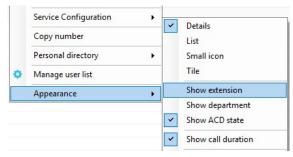
	Service Configuration	· .	~	Details	
	Copy number			List	
	Personal directory	•		Small icon	
¢	Manage user list			Tile	
	Appearance	•		Show extension	
				Show department	
			~	Show ACD state	

9.1.1 Details View

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

Contacts Activity Logs Abandoned Calls Voice	mail		🧭 My status: available	in office
Search Q				
Name	Phone	ACD State	Status	
Ohris Tutt	020828812	Sign-Out		
Oindy Baker	020828812			
Ocolin Wardle	020828812	Sign-Out		
8 Dave Baker	020828812	Available	Talking to +447717580512 - 20:22 / In a meeting	
David Higgins	020828812	Sign-In		
Dean Thompson	020828812	Sign-In		
3 Ed Thrus	020828812	Sign-In	Currently away	
Ø Gopikrishnan V	8332	Available		
🧿 lain Sin	020828812	Sign-Out		
Krysia Swiatek	020828812	Available		
2 Lee Hous	020828812	Sign-In		
2 Lewis Marcan	020828812	Available	Talking to Conference Bridge - 18:35 / Currently busy	
3 Paul Farrant	020828812	Available	Talking to Alastair Brown - 02:00	
Steve Tutt	020828812	Unavailable - WebChat		
Steve Wardle	020828812	Unavailable - Comfort Break	In a meeting until 3pm	
🕗 Vas Koria	020828812	Available		

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.



9.1.2 List View

This option will display all users in a list.

Contacts	Call Logs	Voicemail	
Search			Q
Alastair Amy Ba Charlott Chris Tr Cindy H Colin E	kker te Houston utt diggins arl hompson bewey nott rown crcantonio Quartly ria Swiatek nrussell utt /ardle		

9.1.3 Small Icon View

This view combines a simplified look and space reduction.

Contacts	Call Logs	Voicemail	
Search		Q	
Alastair		📀 Amy Baker	Charlotte Houston
Dean D	ewey	Ed Sinnott	O Harry Brown
Lewis S	wiatek	Paul Thrussell	Steve Tutt
Cindy H	liggins	Colin Earl	Chris Tutt
3 Krysia (Quartly	🕗 Lee Koria	📀 lain Marcantonio
	dds	David Thompson	Steve Wardle

9.1.4 Tile View

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

Contacts Call Logs	Voicemail				📀 My status: available in office
Search	٩				
🛇 Alastair Farrant	nmy Baker	📀 Charlotte Houston	😮 Chris Tutt	📀 Cindy Higgins	Olin Earl
🖉 Dean Dewey	Ed Sinnott	😢 Harry Brown	🥏 Iain Marcantonio	😢 Krysia Quartly	📀 Lee Koria
🙁 Lewis Swiatek	📀 Paul Thrussell	Steve Tutt	Steve Wardle	🖉 Vas Dadds	📀 David Thompson

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

Chris	Tutt
Do not	disturb

9.2 User Icons

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

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

9.2.1 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].

😢 Paul Brown Talking to +4475344 (Partner Support) - 08:45

9.2.2 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.

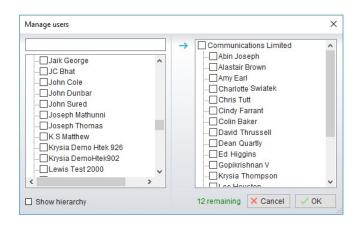
00	Ringing. Unity open and available for IM
ο.	DND/Unavailable profile. Unity open and available for IM
0	Engaged. Unity open and available for IM
0.	Available/on-hook. Unity open and available for IM

9.3 Managing Monitored Users in the Contacts Panel

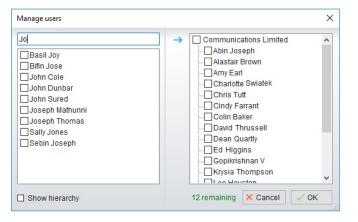
The Contacts panel will display 30 users. In the Contacts panel right click anywhere and click "Manage user list". This will allow you to choose which users to display.

	Personal directory	•
٥	Manage user list	
	Appearance	•

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



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



9.5 Performing Call Control Actions in the Contacts Panel

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

9.5.1 Call Extension

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

9.5.2 Answer This Call [Call Pick-Up]

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

Feature Dependency:

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

9.5.3 Park Call on Extension

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

Feature Dependency

I. Must have a live call

9.5.3.1 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 "P" or the toast pop up. If the call is not retrieved it will be redirected back to the original user who parked the call.

Unity Desk	top: Jenna Win	nshurst					
e Messag	ging Tools	Help					
c) 🌗				•••	Ķ	Ð	\odot
elease Di	al Transfer	Hold	Conference	Voicemail	Recording	Pickup Call	Settings
From					То		
Natalie Maines (Salesforce Contact)					Jenna Wimshurst		
(Salesfo	ked from Ge prce Contact re to pickup)	well	×			

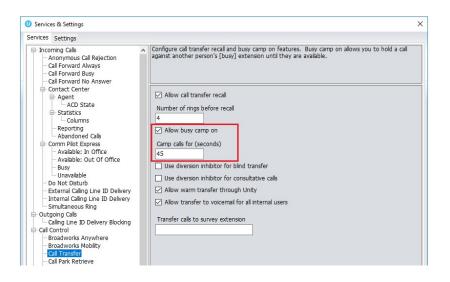
9.5.4 Camp Call on Extension

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

Feature Dependency

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

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



9.5.6 Call Mobile

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

Feature Dependency:

The monitored user must have their mobile number entered in BWKS

9.5.7 Transfer Call to Mobile

Performs blind transfer call to monitored users mobile.

Feature Dependency:

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

9.5.8 Transfer Call to VoiceMail

Performs blind transfer to the destination user's voicemail.

Feature Dependency:

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

9.5.9 Barge into This Call

Makes an immediate three-way conference call with the Agent 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 Agent user can Hold/Retrieve the same as for a conference call.

From	То	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 ^(C) then select the option to leave the conference, as shown below.



Feature Dependency:

- I. The Agent 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

9.5.10 Call Extension When Available

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

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

Feature Dependency:

I. Monitored user must be engaged on a call

9.5.11 View User Details

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

Steve Wardle	X
Title:	
Email:	steve.wardle@kakaposystems.co
Phone:	02082881245
Mobile:	
WAV File:	
	√ ОК

9.5.11.1 Adding Audio Alerts to Monitored Users

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

9.5.12 Send Email

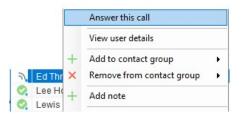
This will open a new email window in the default Email application. The user must have the email filed populated against their name in BWKS.

Feature Dependency:

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

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

10. INSTANT MESSAGING [FEATURE NOT AVAILABLE]

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.

10.1 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.

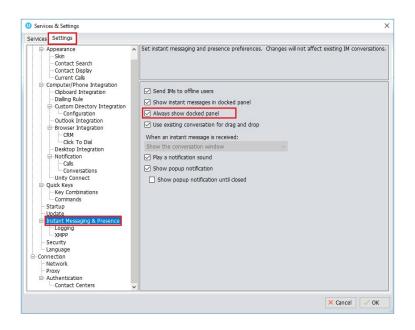
State	Online [Unity Open]	Offline [Unity Closed]
Available	0	0
Ringing	20	2
Engaged	8.	8
DND/unavailable profile	ο.	•

10.2 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.



10.3 Undocking and Redocking IM sessions

You can undock an IM message by clicking the separate window.

Docked IM



Click the Source Click

Undocked IM

Onversation: Steve Wardle	-	L	1	×	
Steve Wardle: yep Jenna Wimshurst: sweet thanks Steve Wardle: its parking					•
Γ					
Last message received at 10:48		•	×	CP	Ð

10.4 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.

 Peter Law Prathap MK Sally Jones Subha T Tracey Scoates Vas Koria 	^	÷	Communications Limited Chabin Joseph Steve Tutt Steve Wardle	
	~			

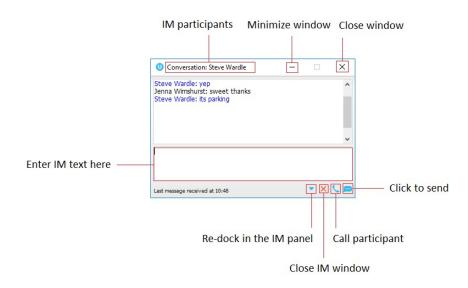
10.5 Overview of IM Window

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 presence of the strong to the strong the strong terms of terms of the strong terms of terms of

IM Window - Docked

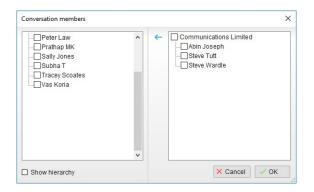


IM Window – Undocked



10.6 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.



10.7 Sending Contact Directory Numbers

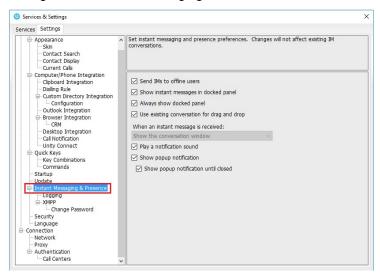
To send another user a number from your Directory right click in the bottom panel where you enter text. Mouse over to see your Directory entries and select the appropriate number.

Feature Dependency:

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

10.8 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.

22 Chris Tutt Please call Simon Steel on 020 8288 4470

10.9 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.

10.9.1 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 agent's local computer.

rices Settings	
 Appearance Appearance Contact Search Contact Search Contact Display Current Calls Consult Phone Integration Dialing Rule Custom Directory Integration Dutlook Integration Browser Integration Cick To Dial Desktop Integration Hootfaction Hootfaction Hootfaction Hootfaction Hootfaction Hootfaction Hootfaction Hootfaction Hootfaction Host Revise Conversations Unity Connect Quick Keys Startup Update Instant Messaging & Presence Language Connection Network Provy Authentication Contact Centers 	Set instant messaging and presence logging preferences. Log files can be saved in a central location for security purposes. Log instant message conversations Create a new file for each conversation Create a new file for each conversation Create a new file every day Always use the same file Log file type HTML Log Folder C(Program Files (x86))Unity Clent\Instant Message Log\

10.10 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.

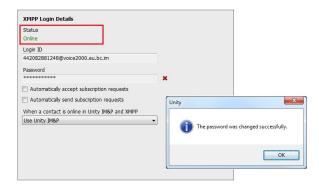
10.10.1 XMPP Authentication

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 Agent, although no other UC-One related service need be assigned.

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

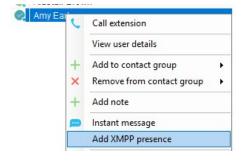
O Services & Settings	×	O Services & Settings	,
Services Settings		Services Settings	
Serika Jacoby (♥ - Unity Settings ♥ - Unity Settings + - Skin Skin Contact Dashy Contact Dashy Contact Dashy Contact Dashy Contact Dashy Contact Dashy 	Configure XMPP details for Unity. The XMPP server will be assumed from the domain entered as part of the login ID. XMPP Login Details Status Onfine Login ID legena.wrinhurst@urins.vocc2000.com Password Automatically accept subscription requests Automatically send aubscription requests When a contact is online in Unity IM&P and XMPP Use XMPP Vise XMP Vise XMPP Vise XMPP Vise XMPP Vise XMPP Vise XMPP Vis	Services Second - Unity Settings - Apparance - Sala - Contact Deplay - Configuration - Configura	Change the Integrated Messaging password. Please note that UC-One will need to be restarted after changing the password in Unity. New password Confirmation
L	X Cancel V OK		X Cancel V OK

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



10.10.2 Managing XMPP Subscriptions

To subscribe to XMPP presence for a monitored user (meaning the Agent 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", as shown here. If already subscribed, then right-click the user to remove XMPP presence.



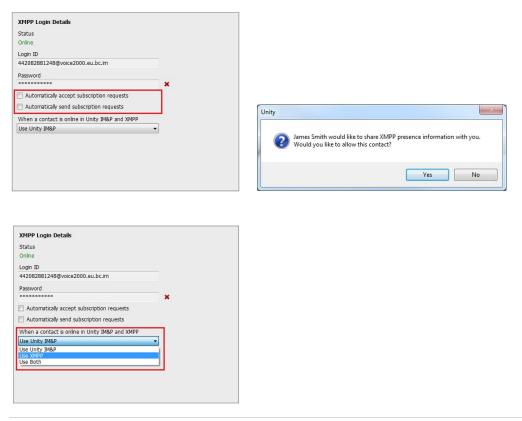
Unity will show the unavailable, busy etc status of the user, as well as any status message manually entered in UC-One, as illustrated below.

1	Smart UC-One	_		×		
<u>F</u> ile	<u>E</u> dit <u>C</u> ontacts C <u>a</u>	lls C <u>o</u> n	versations	>>		
	Wimshurst, .			+		
0	Steve Tutt			0:	2082881251	
0	Steve Wardle			02	2082881245	In a meeting until 3pm / Currently away

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

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

Unity can also be configured to automatically accept subscription requests from other users, if this setting is not activated then whenever a user subscribes to the Agent's 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 impact the existing XMPP registration, therefore there is no impact on UC-One.

10.10.3 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.

Services & Settings	×	Services & Settings	
Services Settings		Services Settings	
Services Settings	Set instant messaging and presence preferences. Changes will not affect existing IM convenations. Send IMs to offline users Show instant messages in docked panel Aways show docked panel Use existing conversation for drag and drop. When an instant message is received: Show the conversition number of the standard of the standard of the conversition for drag and drop. Yes existing conversition for drag and drop. Yes not the conversition number of the standard of	Services Settings	Set instant messaging and presence logging preferences. Log files can be saved in a central location for security purposes.
Connection Network Proxy Authentication		Connection Network Proxy Authentication	
	× Cancel ✓ OK		× Cancel ✓ OK

10.10.4 Configuration

11 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 Section. Double clicking the icon will make a call to the Directory number. The Personal Directory menu is available when right clicking a monitored user or in the Contacts panel.

Personal Directory – Right click in Contacts

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

😪 Amy E 📞 Call extension View user details +Add to contact group × Remove from contact group ۲ Add note Instant message Add XMPP presence Send email Show calendar Service Configuration . Copy number Personal directory • Add new entry Ø. Manage user list Import directory Appearance Export directory .

Personal Directory – Right click on monitored user

11.1 Add New Entry

Enter the Name and Number and click Ok

Add Personal D	rectory Entry	×
Name	Derek Lynch	
Phone	07976	
	× Cancel	V OK

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



11.2 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".

Derek Lynch	 Call number 			
	Add to contact group	•		
1	Remove from contact group	•		
	Add to default list			
	Copy number			
	Personal directory	•		Edit Derek Lynch
4	Manage user list		×	Remove Derek Lynch
	Appearance	•	+	Add new entry
				Import directory
				Export directory

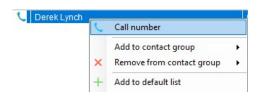
11.3 Remove Entry

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".

Derek Lynch	5	Call number			
	×	Add to contact group Remove from contact group	•		
	+	Add to default list			
		Copy number			
		Personal directory	•		Edit Derek Lynch
	0	Manage user list		×	Remove Derek Lynch
		Appearance	•	+	Add new entry
					Import directory Export directory

11.4 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".



11.5 Import Personal Directory

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

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

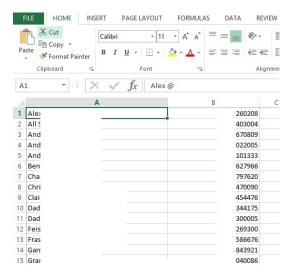
11.6 Export Personal Directory

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

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

Choose save location on local PC.

The format of the csv is Name and then Number. Note the example below is edited for privacy.



12 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 Agent 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.

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

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

12.1 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.

12.2 Contact Search Results Layout

To perform a search type characters or numbers in the Search field and Agent 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.

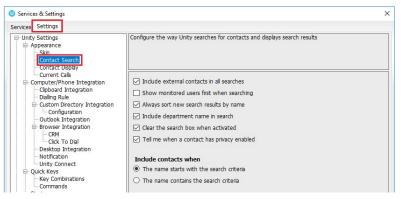
Cor	ntacts Call Logs Voicemail	
s	earch joh Q	
Vai	ne	Phone
C	Camron Johnson (Salesforce Contact)	00180
6	Glenn Johnstone (Salesforce Contact)	64214
6	Johan Bergin (Salesforce Contact)	46850
5	Johan Klaus (Salesforce Contact)	00313
6	Jóhannes Guðmundsson (Salesforce C	00354
6	John Cole	01173
6	John Daniels (Salesforce Contact)	07956

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.

12.3 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.



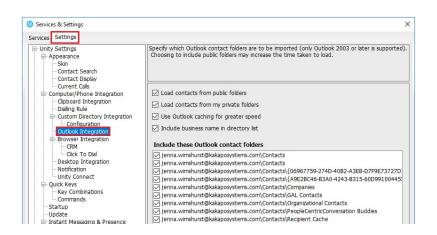
12.3.1 Listing Directories

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.

Search		
	Communications Limited	Entire directory
Name	Common phone list Personal directory	Helpdesk
		Sales Team
	Outlook contacts	Technical
		ed test
		Kakapo

12.4 Configuring Outlook Contacts Preferences

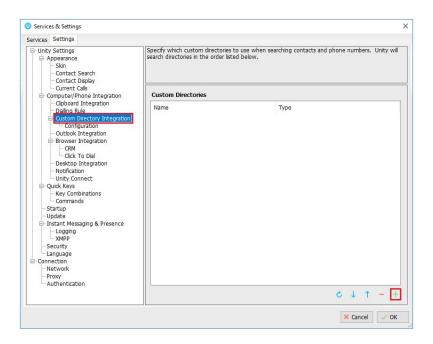
The Outlook directories are both public and private folders and is configurable in Settings > Outlook Integration as below.



12.5 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 Agent 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.



12.6 Desktop Integration

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

O Services & Settings		×
Services Settings		
Appearance Appearance Skn Contact Search Contact Ospoly Current Cals Contact Display Current Cals Computer/Mone Integration Configuration Conversions Conversions	Configure Unity to integrate with third party applications through a shared fi Configure Unity to integrate with third party applications through a shared fi Copy remote number to dipboard Witte remote number to file Path Use remote number as file name Use static file name Use static file name Name Call.txt Everytime I answer an inbound cal Call.txt Everytime I make an outbound cal Call.txt Everytime I make an outbound cal Call.txt Everytime I make an outbound cal Call.txt	e or the dipboard.
		X Cancel V OK

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

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

13 CALL LOGS

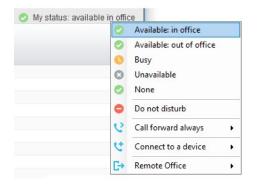
The Call Logs tab displays Missed, Received and Dialled Calls with a date and time stamp showing the most recent call at the top. Up to 20 numbers are listed unless the Enhanced Call logs service is assigned to the Agent user in BroadWorks. Calls to the Agent user DID as well as hunt group and call center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

Contacts Call Logs Voicemail Abandoned Calls	S Voicemail Abandoned Calls			
Missed calls O Received calls O Dialled calls				
Call Date	Phone Number	Name		
11/08/2016 16:01:38	1248	Chris Tutt		
11/08/2016 12:37:31	0139:	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, but clicked the 📮 Export button.

14 MY STATUS

The "My Status" link provides an indication of the current status of the user as well as quick access to key services that are regularly modified. Unity will only display the options for the services that have been assigned to the user, available services are CommPilot Express (CPE), Do Not Disturb (DND), Call Forward Always (CFA), Remote Office and Hoteling Guest (for hot-desk environments).



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

User State	Description	User Status Image
Available: In Office	I am in the office and available to receive calls.	0
Available: Out Of Office	I am not in the office but am available to take calls	0
Busy	I am currently busy (short term)	•
Unavailable	I am currently unavailable (longer term)	•
None	No call routing plan is in use	0

14.1 Configuring CommPilot Express States

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

ervices Settings	
Incoming Calls Anonymous Cal Rejection Cal Forward Always Cal Forward Busy Cal Forward Busy Cal Forward No Answer Cal Forward No Answer Cal Formard No Answer	CommPike Express allows you to pre-configure four profiles to control your inbound calls. These profiles can quickly be changed through Unity when you leave your desk or are at a remote location
B-Agent	When Unity starting set my profile to
- ACD State	Not Set
Columns	When Unity closing set my profile to
Reporting	Not Set
Comm Pilot Express	Available: in office
- Available: Out Of Office	Available: out of office Busy
Busy Unavailable	Unavailable
- Do Not Disturb	None Not Set
External Caling Line ID Delivery Internal Caling Line ID Delivery	
- Simultaneous Ring	
Outgoing Calls	
- Calling Line ID Delivery Blocking	
Broadworks Anywhere	
Broadworks Mobility Call Transfer	
- Call Park Retrieve	
- Call Recording	
Call Waiting Directed Call Pickup With Barge-in	

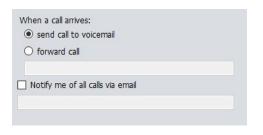
14.1.1 Available: In Office

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

If busy	
 send call to voicemail 	
O forward call	
to	
If not answered	
 send call to voicemail 	
O forward call	
to	

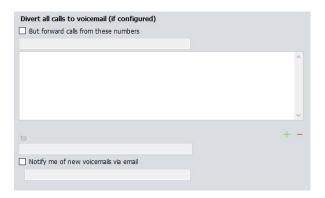
14.1.2 Available: Out Of Office

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



14.1.3 Busy

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



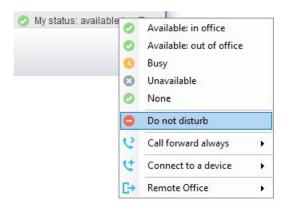
14.1.4 Unavailable

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

Divert all calls to voicemail (if configured) But forward calls from these numbers	
	^
	× .
to	+ -
When a call is sent to voicemail	
O use "unavailable" greeting	
use "no answer" greeting	

14.2 Do Not Disturb

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



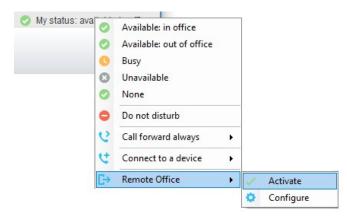
Anyone monitoring the user [in the Contacts list] will also see that they currently have Do Not Disturb activated.

4.3 Call F	orw	ard Always			
My status: availa	ble in	office		27	
	0	Available: in office			
	0	Available: out of office			
	0	Busy			
	Θ	Unavailable			
	0	None			
	•	Do not disturb			
	2	Call forward always	•	1	Activate
	4	Connect to a device	•	٥	Configure
	G→	Remote Office	•		

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

14.4 Remote Office

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



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

U Services & Settings			
Services Settings			
Coll Center	*	Use your home, mobile or any other other phone as your busines through Unity.	s phone and control E
Reporting Comm Pilot Express Available: In Office Available: Out Of Office Busy Unavailable On Not Disturb		Enabled Phone number 079005756 Automatically activate when starting	
External Caling Line ID Delivery Internal Caling Line ID Delivery Simultaneous Ring Outgoing Calis Caling Line ID Delivery Blocking Galing Line ID Delivery Blocking	н	Force confirmation of remote office number on startup Automatically deactivate when closing	Unity
Broadworks Anywhere Broadworks Mobility Call Transfer Call Park Retrieve			Remote office is currently active, would you like to deactivate this service?
Call Recording Call Waiting Directed Call Pickup With Barge-in Hoteing Guest Remote Office			Yes No

14.5 Hot-Desk and Flexible seating

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

eph s Brown g gent Two (Jain's Kit) Icce Phone beating Guest Flex - 91	0		Available: in office Available: out of office Busy Unavailable None Do not disturb Call forward always Compet to a device
eating Guest Flex - 91 eating Guest Flex - 91		C+	Remote Office
eating Guest Flex - 91 Seating Guest Flex - 91			

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

Firex - 9114	Available: in office Available: out of office Busy Unavailable None Do not disturb
Flexible Seating Guest Flex - 9110	Call forward always
Flexible Seating Guest Flex - 9114 Flexible Seating Guest Flex - 9115	Connect to a device
Flexible Seating Guest Flex - 9116 Flexible Seating Guest Flex - 9118	C> Remote Office

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



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

14.6 Personal Assistant Service

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.

	Desktop: Chris Tutt ols Help Dial Transfer	0 🛽	Settings						×				
From		То		Duration		Status							
	Call Logs						O My s	status: in	office	Personal assistant	•	~	None
Search Name		Q	Phone		Status				2	Call forward always	٠		I am currently on a business tri
	Joseph		8335		Status								l have gone for the day l am at lunch
	krishnan V		8332										I am in a meeting
-	a Wimshurst		1003										I am out of the office
Steve			1002						_				I am temporarily out
Steve	Wardle		1004										I am in training
													I am currently unavailable
													I am currently on vacation

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.)

Services Settings	
Incoming Cals Cal Forward Always Cal Forward News Cal Forward News Cal Forward Newsen Caling Line ID Delivery Internal Caling Line ID Delivery Outgoing Cals Caling Line ID Delivery Blocking Caling Line ID Delivery Blocking	Provides a do not disturb capability for inbound calls but with additional information regards the reason why you are away and optionally when you will return. You can specify which numbers this service configuration will apply to, and add remote party numbers that will bypass the do not disturb behaviour Configuration Apples To Excluded Parties Status None
- Call Transfer - Call Waiting	Until 24/01/2019 □ 21:12
	1251
	Play ring splash when a call is processed

Services & Settings		
ervices Settings		
Incoming Cals Cal Forward Always Cal Forward Busy Cal Forward No Answer Personal Assistant External Caling Line ID Delivery Internal Caling Line ID Delivery	the reason why you are away and opti	inbound calls but with additional information regarding onally when you will return. You can specify which popy to, and add remote party numbers that will Parties
Outpoing Cals Caling Line ID Delivery Blocking Caling Line ID Delivery Blocking Cal Control Cal Transfer Cal Wating	Type Primary	Number 1001

Services & Settings		
Services Settings		
Incoming Calls Call Forward Always Call Forward Busy Call Forward Busy Call Forward No Answer Personal Associate	Provides a do not disturb capability for inbound the reason why you are away and optionally w numbers this service configuration will apply to bypass the do not disturb behaviour	hen you will return. You can specify which
External Caling Line ID Delivery Internal Caling Line ID Delivery Outgoing Calis Caling Line ID Delivery Blocking	Configuration Applies To Excluded Parties Number 09900575695	Description My mobile
Call Control Call Transfer Call Walting		

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

Personal Assis Provides a do not disturb capa	tant ability for the user with additional information as to why the	e user is not available and when they will return.	
OK Apply	Cancel		
General	Call to Numbers	Exclusion Numbers	
Presence: Business		AM T	
	eminder when a call is transferred to attendant or voice m	nail	
OK Apply	Cancel		

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

Contacts Call Logs Voicen	nail		
Search	Q Engineering HR	Management Reception	Sales
Name	Phone	ACD State	Status
Paul Brooker	01173700070	Sign-In	
Paul Dewey	02082881252	Unavailable - Clearing T	ckets
Rotor Low	02092991264	Sign Out	
Sally Jones	0004	Sign-Out	I am currently on vacation until 31/01/2019 09:30
Sebin Joseph	2255	Sign-In	
Shan George	8354		
Steve Tutt	02082881251	Sign-Out	

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
- o I am at lunch
- I am in a meeting
- o I am out of the office
- o I am temporarily out
- o I am in training
- I am currently unavailable
- o 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.

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