

KAKAPO

SYSTEMS

UNITY DESKTOP WEB

Quick User Guide

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1 INTRODUCING UNITY

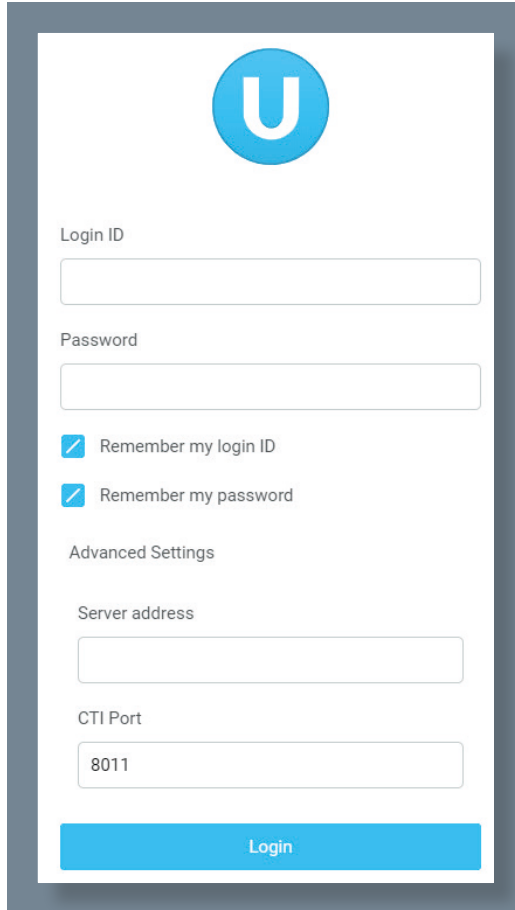
Unity Desktop Web is a web based application that enhances the Hosted PBX solution to provide call control, directory integration, instant messaging, and service configuration. Featuring an intuitive icon based interface, Unity provides point and click call control within Google Chrome, Safari for Mac, Microsoft Edge and Internet Explorer. Unity improves workgroup collaboration by bringing users closer to each other and simplifying internal and external communication.

The below services are supported:

Service	Description
Anonymous Call Rejection	Prevent a caller from contacting you if they have explicitly hidden their phone number
Call Forward Always	Automatically forward all incoming calls to a number
Call Forward Busy	Automatically forward all incoming calls to a number when the user is on the phone
Call Forward No Answer	Automatically forward all incoming calls to a number when the call hasn't been answered after a certain number of rings
Call Recording	Record incoming and outgoing calls, refer to section 5.8 for more information
CommPilot Express	Use pre-configured routing profiles to handle incoming calls based on the current state of the user
Do Not Disturb	Block all incoming calls and reroute to voicemail if available
Simultaneous Ring	Automatically ring another number when an incoming call is received, the call can then be answered through that number or the primary phone
Calling Line ID Delivery Blocking	Hide your phone number when making outgoing calls
BroadSoft Anywhere	Connect mobile or fixed-line devices to the VoIP account, and switch calls between them
Call Transfer	Transfer calls to internal or external numbers
Call Waiting	Answer an incoming call when already on a call
Call Park Retrieve	Retrieve a call that has been parked for a specific user
Directed Call Pickup With Barge-In	Automatically join another users call
Hoteling Guest	Associate the VoIP account to another device so that it is treated as the primary device. Used in a hot-desking environment.
Remote Office	Associate a mobile device to the VoIP account to make or receive calls
Shared Call Appearance	Control multiple devices for the same VoIP account
Voice Messaging User	Provide voicemail for unanswered incoming calls
External and Internal Calling Line ID Delivery	Provides Calling Line ID information of an incoming call from outside the group

2 INITIAL SETUP

Unity requires an initial configuration in order to communicate with your service provider's BroadSoft.



The screenshot shows the Unity login and configuration interface. At the top center is the Unity logo, a blue circle with a white 'U'. Below the logo are the following fields and options:

- Login ID**: A text input field.
- Password**: A text input field.
- Remember my login ID
- Remember my password
- Advanced Settings**
 - Server address**: A text input field.
 - CTI Port**: A text input field containing the value '8011'.
- Login**: A blue button at the bottom.

The first-time Unity is started you will be prompted to enter the configuration details, as shown here. Unity can then retain the connection and authentication details for later use.

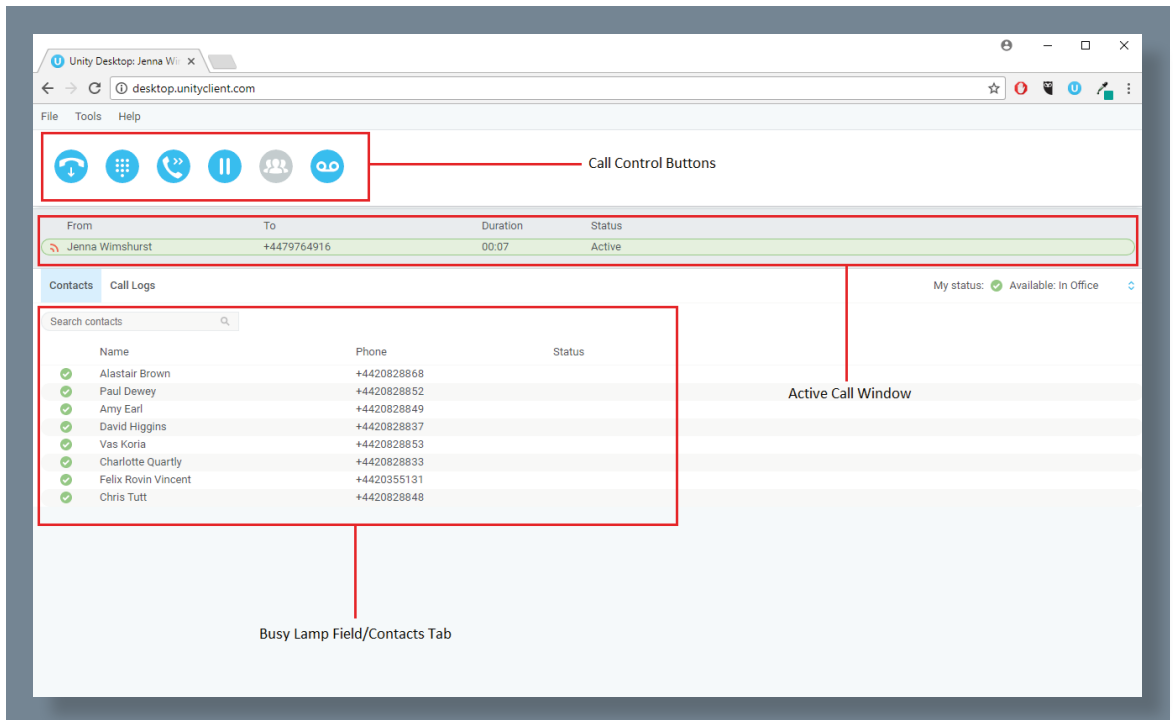
Enter your Login ID and password and the BroadSoft Server Connection as specified by your Service Provider.

Once you have entered your login details click login. Unity will now display a dialogue box 'Logging into BroadSoft' as the application opens.

3 UNITY DESKTOP WEB INTERFACE OVERVIEW

Unity is split into three functional areas; Call Control buttons, Active Call Window and Contacts [Busy Lamp Field and Instant Messages]. The contacts tab can be toggled to display Call Logs and the Voicemail tab.

The Active Call Window will display the status of all current calls for the logged in user, which are controlled using the Call Control buttons. These call control buttons will change based on the status of the call.



4 MAIN INTERFACE ELEMENTS

4.1 CALL CONTROL

Call Control buttons provide quick access to common telephone handling commands. Only services that are assigned to the user are displayed.

4.2 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.

4.3 CONTACTS [BUSY LAMP FIELD]

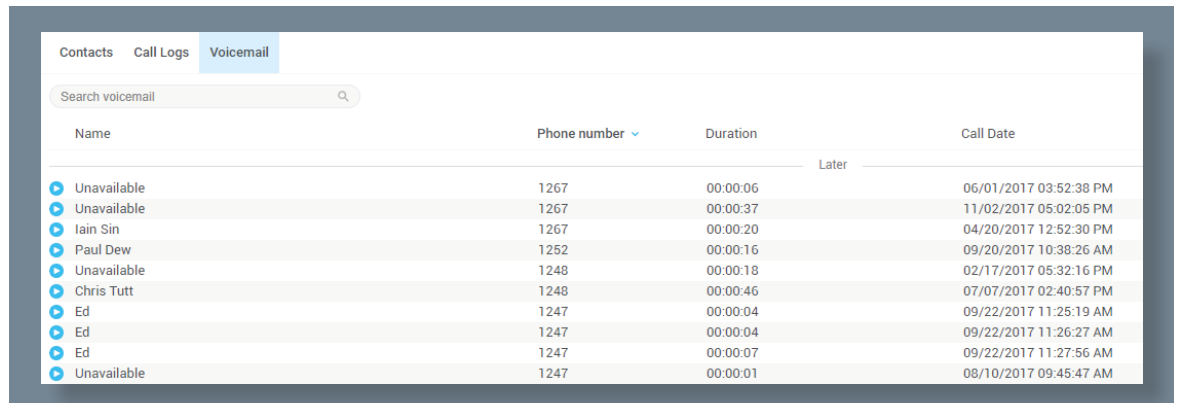
This panel will display up to 30 monitored users, displaying their Do Not Disturb [grey], Available [green], Engaged [red] or Ringing [orange] state as icons.

4.4 CALL LOGS

Toggling the bottom Contacts panel to Call Logs will display Missed Calls, Received Calls and Dialed Calls. Missed Calls will include both direct inwards DID calls and Hunt Group calls.

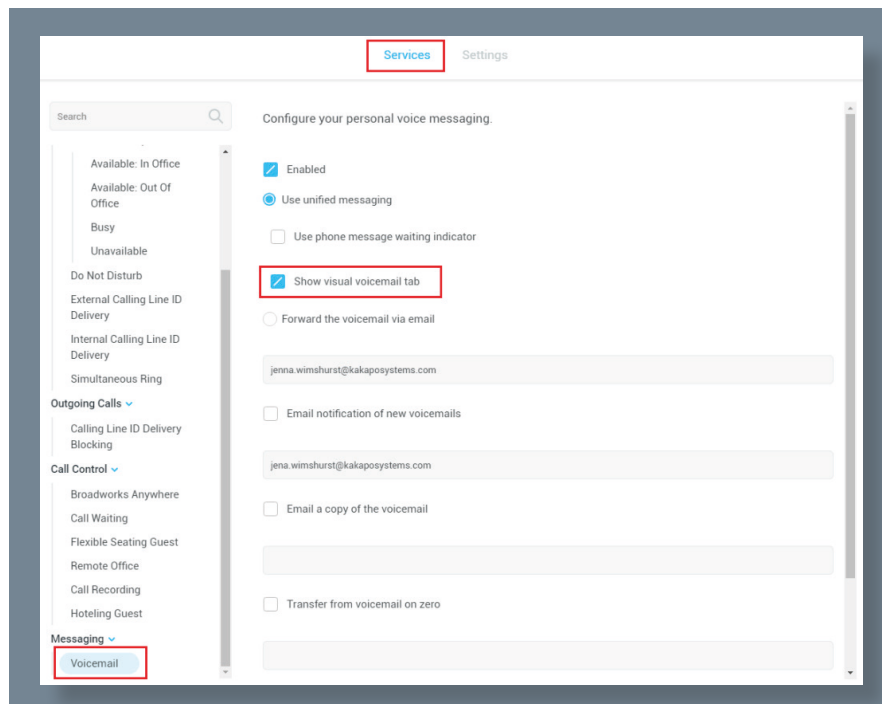
4.5 VOICEMAIL

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.





Name	Phone number	Duration	Call Date
Unavailable	1267	00:00:06	06/01/2017 03:52:38 PM
Unavailable	1267	00:00:37	11/02/2017 05:02:05 PM
Iain Sin	1267	00:00:20	04/20/2017 12:52:30 PM
Paul Dew	1252	00:00:16	09/20/2017 10:38:26 AM
Unavailable	1248	00:00:18	02/17/2017 05:32:16 PM
Chris Tutt	1248	00:00:46	07/07/2017 02:40:57 PM
Ed	1247	00:00:04	09/22/2017 11:25:19 AM
Ed	1247	00:00:04	09/22/2017 11:26:27 AM
Ed	1247	00:00:07	09/22/2017 11:27:56 AM
Unavailable	1247	00:00:01	08/10/2017 09:45:47 AM

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




5 CALL CONTROL


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

5.1 MAKING A CALL


5.1.1 Using the Dial Window

Click the Dial button  to bring up the Dial dialogue box, as shown below. Using the computer keypad enter the desired number and press Enter or click OK to make the call.

5.2 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.


5.3 END A CALL

Click the Release button  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.


5.3.1 Redial

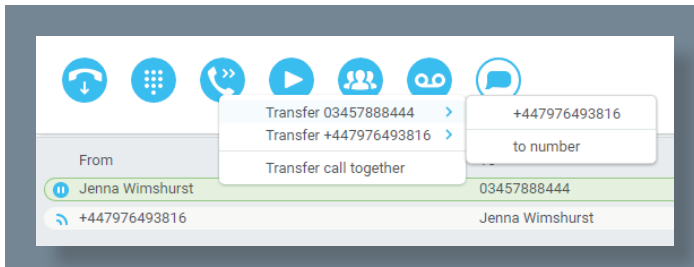
You can also right-click the Dial button to see a list of the last 10 dialled numbers.

5.4 SEND CALL TO VOICEMAIL

To send an inbound caller directly to your voicemail click the Voicemail button .

5.4.1 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.



5.4.1.1 Warm Transfer

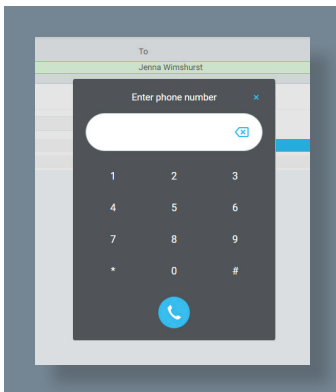
Unity Desktop Web allows you to warm transfer a call by right clicking the user you want to transfer the call to and selecting 'warm transfer' from the context menu. This will then put the original caller on hold and dial the selected number. When ready, click the transfer button in the call center control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


5.4.2 Blind Transfer

5.4.2.1 Using Contacts Panel Drag and Drop

Unity Desktop Web 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.

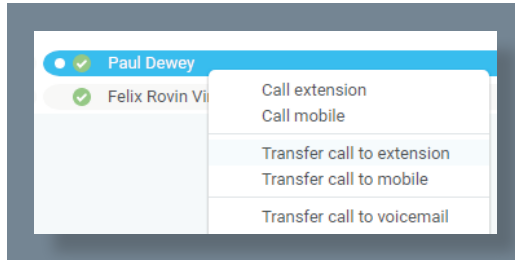
5.4.2.2 Using Transfer Button





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

5.4.2.3 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.




5.5 CALL HOLD/RETRIEVE

The Hold/Retrieve   function toggles depending on the status of the currently selected call. Hold is only available for an active call while Retrieve is only a valid option for a call currently on Hold.

5.5.1 Placing a Call on Hold

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

5.5.2 Retrieving a Held Call

Click the held call in the Active Call Window to select it. Click the Retrieve button  to take the call off hold, you can also double click the call to retrieve it.

5.6 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.

5.7 STARTING A CONFERENCE CALL

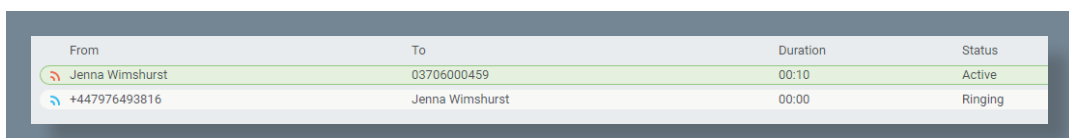
You can select two calls in the Active Call Window and click this button to quickly conference everyone together. Once in a conference you can easily select other calls and add them to it, but you must start with a conference with two other calls first. You can use the hold and retrieve buttons to hold the whole conference, and use the release button to drop a caller out of the conference. Please note this feature depends on service assignment so may not always be available.


5.8 CALL RECORDING

You can use this button to manage call recording in two ways. You can right-click on the button to select how to record calls.

6 ACTIVE CALL WINDOW

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



From	To	Duration	Status
 Jenna Wimshurst	03706000459	00:10	Active
 +447976493816	Jenna Wimshurst	00:00	Ringin

From – This field will display the incoming CallerID or the name

To – This field displays the name of the user or hunt group

Duration – This displays the total time elapsed since the call was first answered

Status – This shows the Ringing/Active, on On Hold and recording status of each call

7 DRAG AND DROP

Drag and drop is an important feature of Unity, it means that in order to perform an action on a call you can simply drag it on top of something. For example, if you want to blind transfer a call to a user then this can be done by simply searching for that user, then dragging the call and dropping it on that user in the contacts list. You may see some options here depending on what was configured in settings, or Unity can automatically blind transfer the call. Similarly, if you want to perform an announced transfer then simple drag one call on top of the other in the Active Call Window, the calls will be transferred together and be removed from the list.

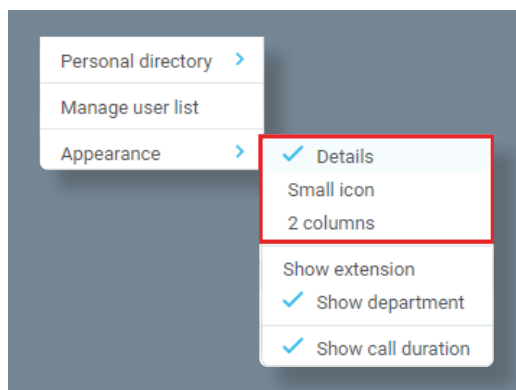
You can also drag other objects into this list to make a call, for example drag a user from the contacts list into the Active Call Window to call that internal user's extension or external contact's number.

8 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.

8.1 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.



8.1.1 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]. This is the recommended view for users as it shows the activity state of up to 30 monitored users.

8.1.2 List View

This option will display all users in a list.

8.1.3 Small Icon View





This view combines a simplified look and space reduction.

8.1.4 Tile View

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

8.2 USER ICONS

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

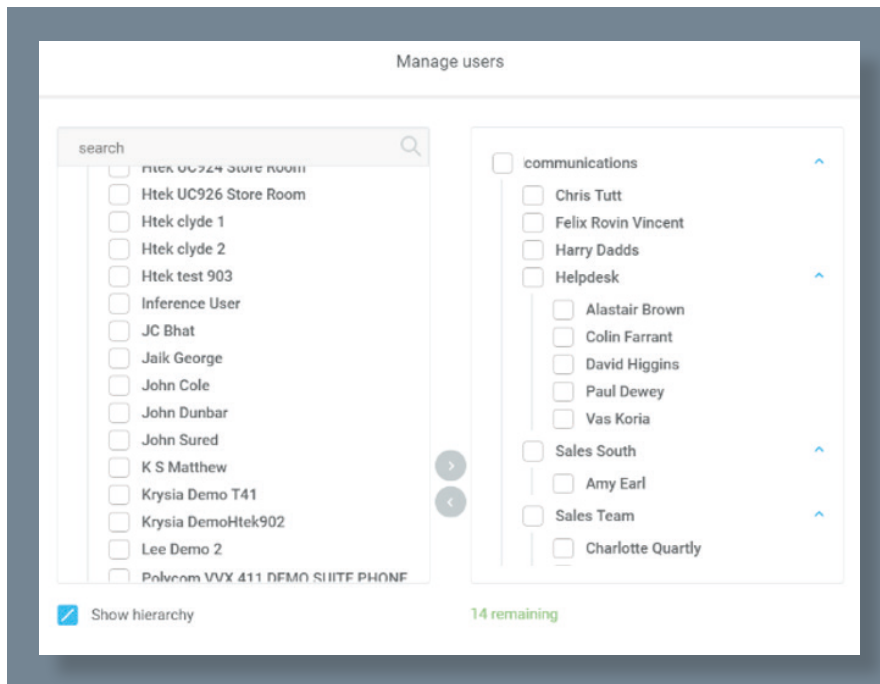
	Available	The monitored user extension is on hook
	Ringing	The monitored user extension is ringing
	Engaged	The user is on the phone
	Do Not Disturb	The user has selected DND or Unavailable profile

8.2.1 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 a small blue dot at bottom right of the user icon.

8.3 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.

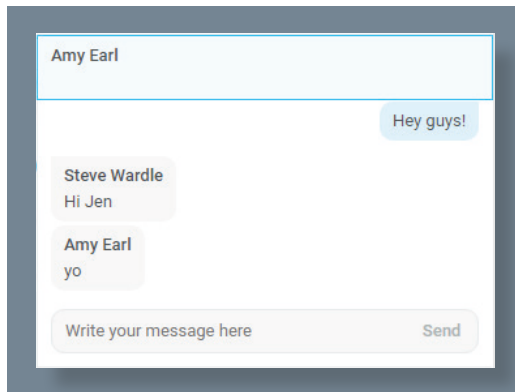


9 INSTANT MESSAGING

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

9.1 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.



9.2 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.

9.3 ADDING PARTICIPANTS TO AN EXISTING IM SESSION

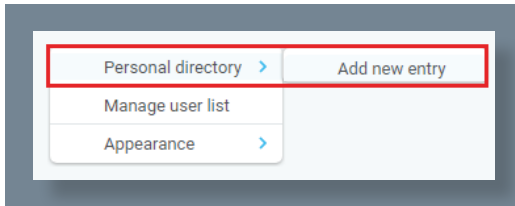
When an IM conversation is in the Docked IM panel you can drag a user icon from the Contacts Panel or Search and drop them on the IM window to add them to the conversation.

9.4 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.

10 PERSONAL DIRECTORY

Personal Directory – Right click in Contacts

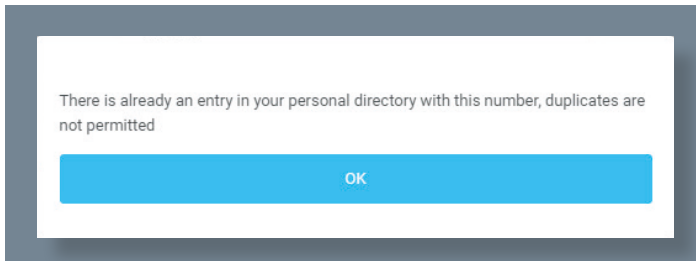


10.1 ADD NEW ENTRY

Enter the Name and Number and click OK.

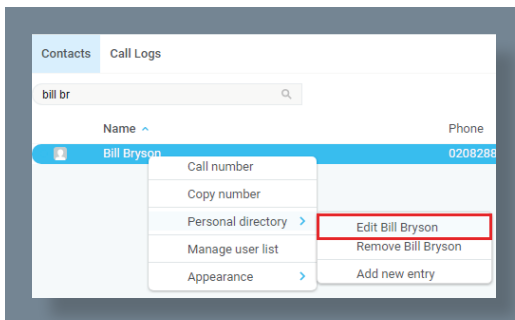
A screenshot of a dialog box titled 'Add to personal directory'. It contains two input fields: 'Name' with the text 'Bill Bryson' and 'Phone' with the text '01202364777'. At the bottom, there are 'Cancel' and 'OK' buttons.

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



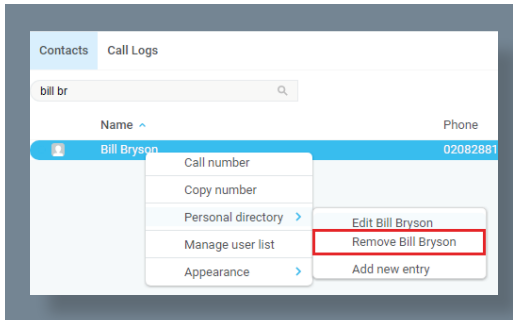
10.2 EDIT ENTRY

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'.



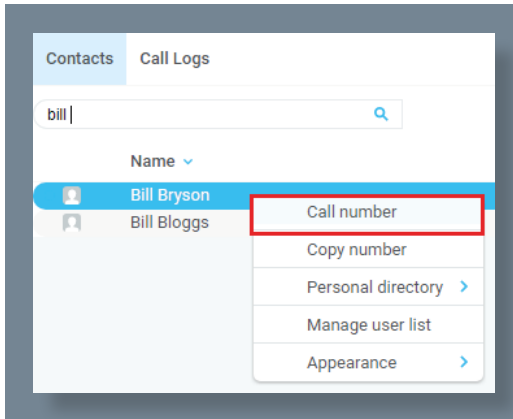
10.3 REMOVE ENTRY

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'.



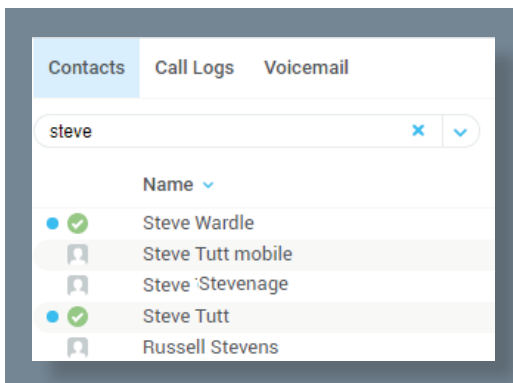
10.4 DIALLING DIRECTORY ENTRY

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'.



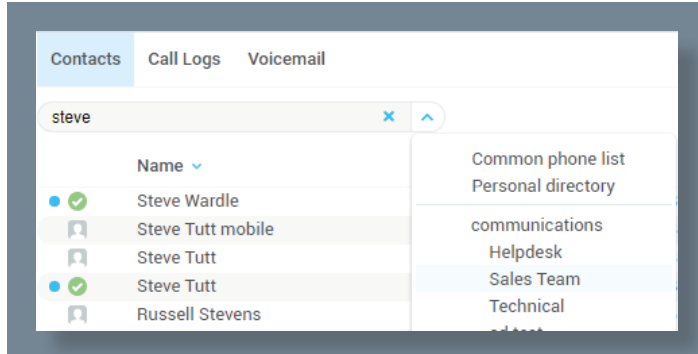
11 CONTACT SEARCH DIRECTORIES

The Contact Search field combines all BroadWorks and Outlook Contacts directories to create a central search repository. The BroadWorks directories include the Common Phone List [system speed dials], the receptions user's own Personal Directory entries, and the Group Directory which includes all the other users in the group as well as hunt groups.



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.

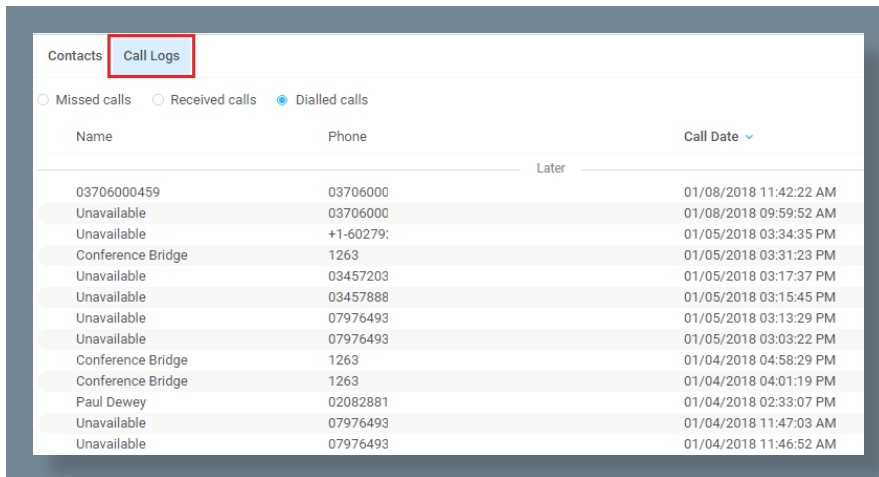
Right click in the search box to select a directory, then click the search button to clear it and see the default list of monitored users.




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

12 CALL LOGS

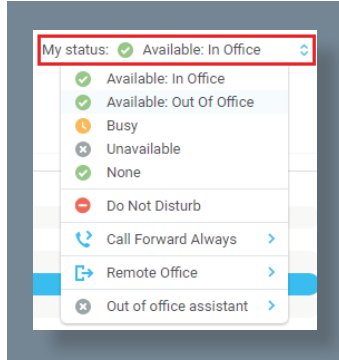
The Call Logs tab displays Missed, Received and Dialed Calls in chronological order [although the sort order can be changed by clicking on the column header]. The Call logs tab will show the number of missed calls since Unity was last used, as well as any missed calls received while Unity is running, as shown below.



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.

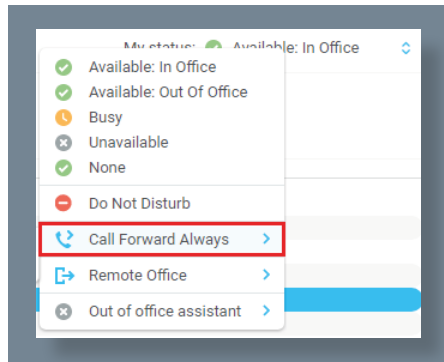
13 MY STATUS

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.



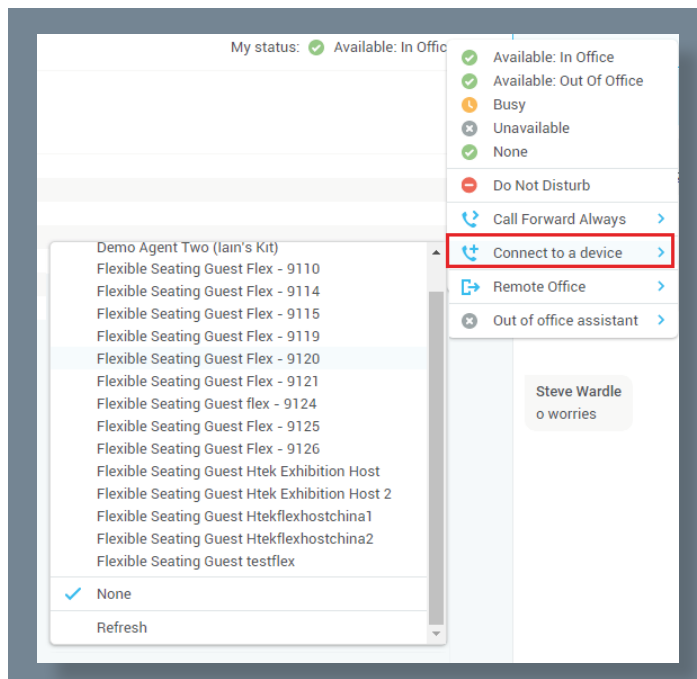
CommPilot profiles are also used to convey presence information to other users within the group or enterprise.

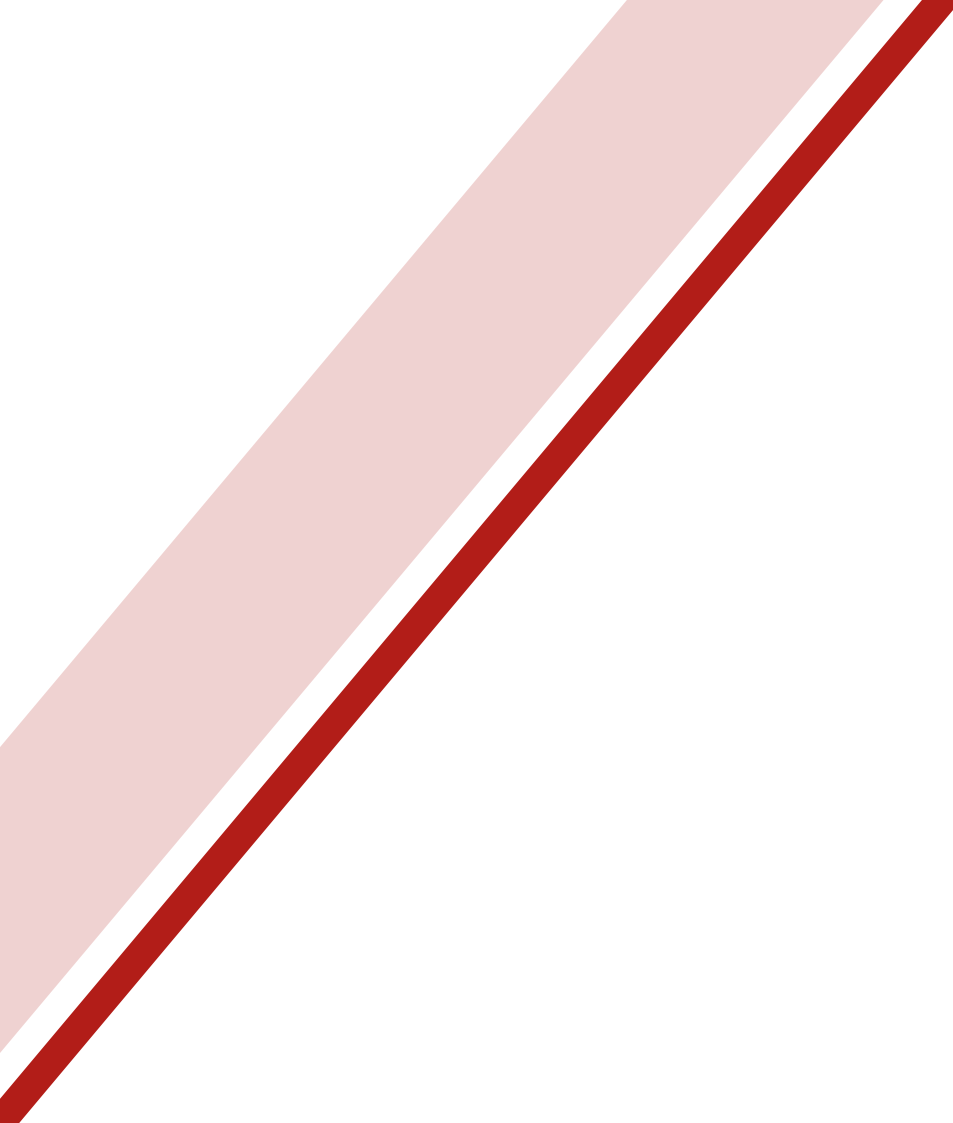
13.1 CALL FORWARD ALWAYS



13.2 CONNECT TO A DEVICE

The user can easily select the device to connect to through the My Status link, as shown below.





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FIND US ON  