UNITY PORTAL – USER GUIDE

CONTENTS
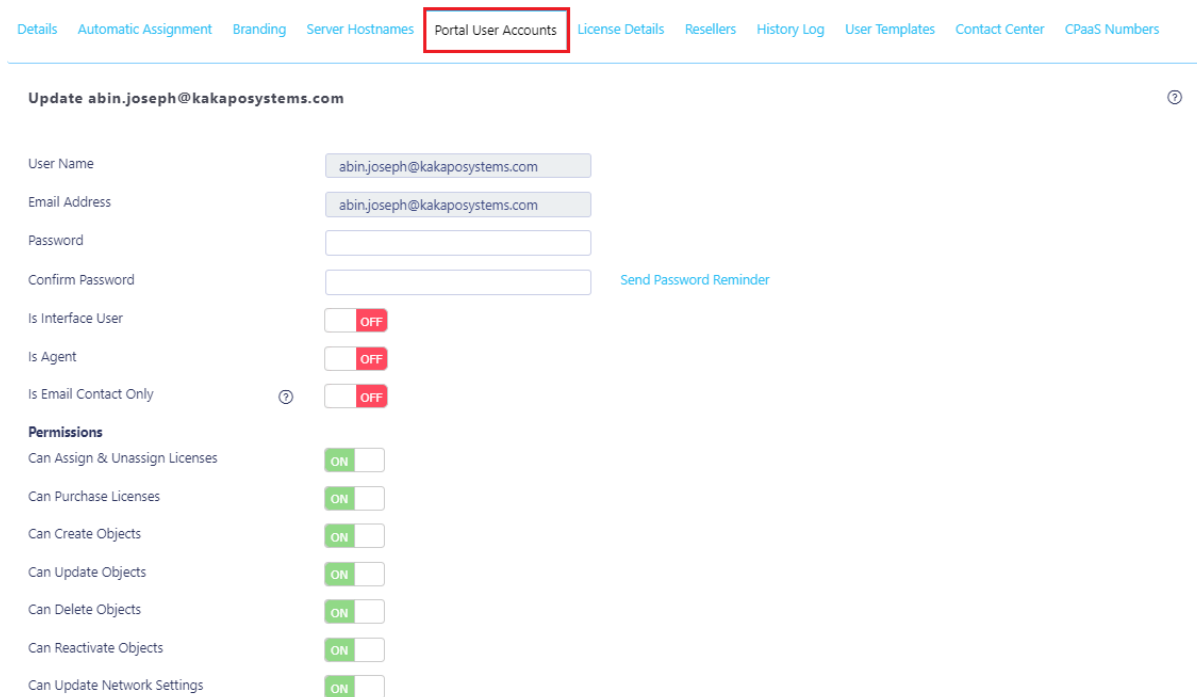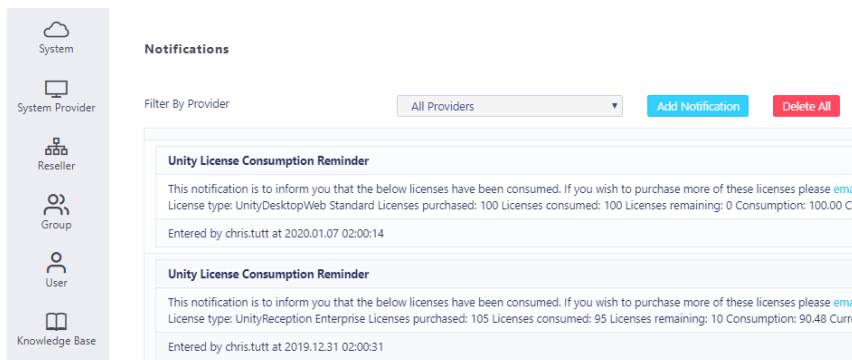
1. THE PORTAL

This document will give you an overview on how to use the Unity Portal and assign licenses as well as explaining how the BroadWorks hierarchy and setup process works.

Did you know that you can also integrate the Portal with your existing provisioning system? Email ineedhelp@kakaposystems.com for more information.

When you are sent your portal login details go to https://portal.unityclient.com/ to login, if your login attempts fail three times then the account will be locked. Once an account is locked it can be unlocked by any logged-in user.

When you first log into the Portal you will be presented with a list of recent notifications.

The Portal is separated into sections relating to the BroadWorks hierarchy; System Provider, Reseller, Group and User. This document outlines the different settings available in the different sections and how they cascade down the hierarchy.

Any settings configured at a higher level will cascade down to the lower ones. These settings can be overridden by simply ticking or unticking the relevant boxes at a lower level. E.g. If "Rollback Available" is ticked at the System Provider level then it will be ticked for all Resellers, Groups and Users. However, the Reseller/Group/User can override this by unticking the box in their own Branding tab.

If any text boxes in the portal settings are left blank then whatever is in the text box at the Parent level will be used. E.g. If there is no license expiry prompt set for the Group level then the information will be pulled from the Reseller level.

Please note: After you change any setting in the portal you must go to the bottom of the page and click Update to save the changes. If you do not click Update the changes will not be saved.

2. DETAILS TAB

In this section the Name, Accounts Reference and Trial duration for the System Provider, Reseller and Group is initially setup.

If you are looking at the Details tab for a User this will display the User ID/MAC Address, Computer Name, Phone and External Reference.

3. AUTOMATIC ASSIGNMENT TAB

Here the System Provider, Reseller and Group are able to customise the expiry prompt that is presented to users once their license has expired.

It is also possible to customise the message they are presented with if the user or call center login fails.

To automatically assign licenses to users simply select the license type from the drop down menu and once the trial license expires for that application, Unity will automatically assign one to the user.

Automatic assignment can be done at the System provider, Reseller and Group level. However, these are usually done at the Reseller and Group level as any automatic assignments made at the system provider level will cascade down to every user under all Resellers.

4. BRANDING TAB

Most of the settings in the Branding tab usually only need to be setup once.
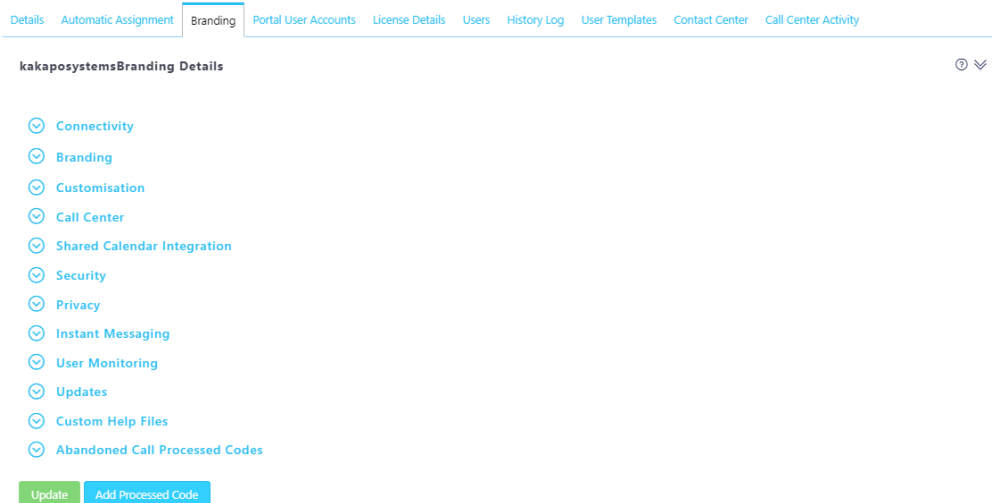
Click this icon to open and collapse all sections:

Connectivity

The VoIP Server Port, Keepalive Frequency and XSI Security Type are a onetime setup and should not be touched after the initial setup.
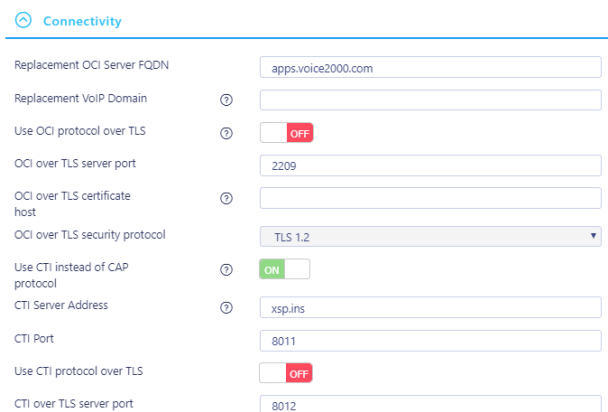
Branding

In the Branding tab the System Provider/Reseller/Group's logo and Icon can be uploaded. The logo is displayed at the top right of the Unity interface and the Icon is located on the top left and in the taskbar.
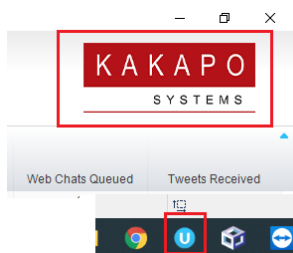
Replacement BroadWorks Phrase will replace all mentions of the word BroadWorks to the word that is entered in the box. Similarly, whatever is entered into the Replacement Client Name will replace the word Unity.

Customisation

"Support Client URL" is the address you want the user to be taken to when clicking Help>Get remote assistance in Unity. This can be done at any level. The call recording URL will be the Broadworks XSP server/servers that host the XSI interface.

"Use login ID when licensing Unity Dashboard": if toggled "On" Unity Dashboard will be licensed against the User ID that was entered to sign into the application, if the toggle is "Off" then Unity Dashboard will be licensed against the MAC address of the computer that was used to sign in.

If you are using the User ID for licensing then the license can be assigned before Unity Dashboard is installed. Unity Dashboard creates a UUID (Universally Unique Identifier) based on the hardware of the machine.

Once the user has first logged in to Unity Dashboard, Unity will send the UUID (combination of system CpuId, BiosId, ProductId) which is saved in Kakapo cloud with that user license and used to identify the computer that the Dashboard is running on.

When Unity Dashboard is started up from a different machine the UUID will not match with the current value saved in portal and the user will not be able to login to that new device.

In the case where the user wants to use a different machine, you will need to go to the User ID that the license is assigned to in the portal, click on the Dashboard license and click the Clear UUID button, as shown below.

Call Center

The "Record Call Center Events" box needs to be ticked in order for Supervisors and Agents to see the abandoned calls in the abandoned calls tab.

Security

These settings can be ticked and unticked according to the System Provider's preference. However, if all boxes are ticked it could lead to users accidently creating errors and issues within Unity.

Privacy

If the "Call Details Available" box is not ticked, then the user will not be able to see the call details of other users. E.g. They will be able to see if someone is on a call but not who they are on a call to.

Enterprise View allows Groups to see the other Groups under the same Enterprise.

Instant Messaging

These settings relate to Unity's Instant Messaging capability. Please refer to the separate XMPP document for more information.

User Monitoring

Select from the drop down menu how you want the default users in the Monitored User List to be presented:

- o **None:** No users will be automatically populated until the user manages the user list in the BLF.
- o **HideTab:** The Contacts tab will not be displayed at all.
- o **Random:** The user list will automatically be populated with users randomly.
- o **Top:** The first X number of users will be populated automatically.

Updates

The "Old Clients Can Update To New Client" box must be ticked in order for users to be using the new blue Unity Client rather than the old red Unity Client.

If "Rollback Available" is ticked then users are able to rollback to older versions of Unity. Below is how this setting looks when available to a user in Unity.
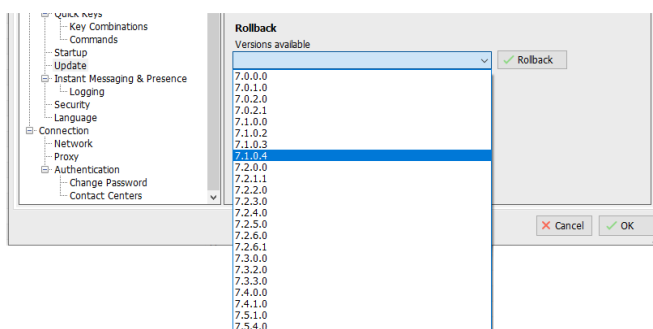
Custom Help Files

Enter the URL for a user guide (PDF) that the user can access through Unity in Help>Contents.

5. SERVER HOSTNAMES

The server address is the unique identifier in the Portal. In this tab the list of all the server hostnames are listed, even though the hostnames are different they all route back to the same BroadWorks server.

To add another hostname, simply click the button at the bottom of the list.
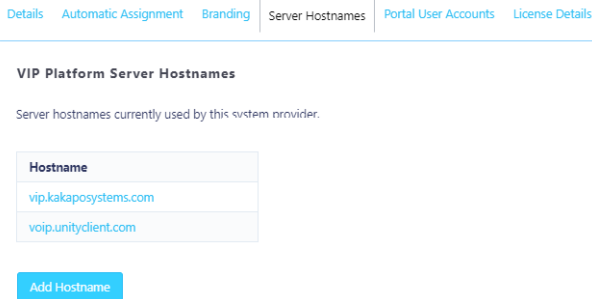
6. PORTAL USER ACCOUNTS

View, delete and add new Portal user accounts and configure all user details, permissions, and notification settings.

To add a user click the "Add User Account" button, as shown below.

VIP Platform Portal User Accounts

Portal login accounts currently used by this system provider.

User Name	License Purchase Permitted	Create Permission	Update Permission
abin.joseph@kakaposystems.com	Yes	Yes	Yes
arjun.h@drdindia.co.in	Yes	Yes	Yes
gopikrishnan.v@kakaposystems.com	Yes	Yes	Yes
jaikgeorge.joy@drdindia.co.in	Yes	Yes	Yes
provision@kakaposystems.com	No	Yes	Yes

Add User Account

Simply enter all of the user's details.

Please note: It is recommended that you use the user's email address as their username to avoid any confusion. It does not matter which password you create as the user will be sent an email to change it.

Permissions Available

Can Assign & Unassign Licenses - This allows users to add and remove licenses to users. It also allows the user to create Media Streams and assign CPaaS numbers to users. (If this permission is not set then the user won't be able to create Media Streams and assign CPaaS numbers because these are billable actions)

Can Create Objects - This is so that the user can create users, groups and enterprises, and assign licenses

Can Update Objects – Update any users, groups and enterprise as well as any settings, for example in Branding, Queues and staff groups in the Contact Center tab.

Can Delete Objects – Delete users, groups and enterprises, and non-temporary licence assignments

Can Reactivate Objects – Reactivate users, groups and enterprises

Can Manage Tickets - If unchecked the user won't see the ticketing menu option on the left when they login

Permissions

Can Assign & Unassign Licenses   ON

Users need these settings toggled on in order to create, update and delete objects in the Contact Center, e.g. Staff Groups, Queues, Supervisors etc.

When creating portal user accounts at the business/group level, there is an additional

permission setting:

If this is toggle is switched on, then the user can only see and access the Contact Center admin settings when they login to the portal:

For more information on how to configure Contact Center settings, view the Contact Center user guide here.

7. LICENSE DETAILS

View, allocate and assign all Unity licenses in the license details tab. Please note that trial licenses are automatically assigned once the user has started Unity for the first time and are automatically deleted once the trial duration has ended.

Details   Automatic Assignment   Branding   Server Hostnames   Portal User Accounts   License Details   Resellers   History Log   User Templates

Licenses

Unity licenses currently assigned to the users of this system provider.

			License Type	Purchased	Allocated	Assigned
Purchases	Allocations	Assignments	UnityAgent Enterprise	1661	1	1847
Purchases	Allocations	Assignments	UnityAgent Trial	0	0	16
Purchases	Allocations	Assignments	UnityAgentWeb Trial	0	0	1
Purchases	Allocations	Assignments	UnityDashboard Tabular100+	70	0	47
Purchases	Allocations	Assignments	UnityDashboard Trial	0	0	2
Purchases	Allocations	Assignments	UnityDesktop Pro	4495	0	3841
Purchases	Allocations	Assignments	UnityDesktop Trial	0	0	12

Click on purchases to see a list of all licenses that have been purchased for that Unity Application. When clicking on Assignments you will be presented with a list of all of the licenses and who they have been assigned to.

8. MANUAL LICENSE ALLOCATIONS

To view all license details, click the License details tab, you will then be presented with a list of all the license types available for all Unity applications.

In the Purchased column you will see all licenses purchased for that application, similarly in the assigned column you will see how many licenses have been assigned to users for that license type.

Click on assignments to view all users that have that license assigned.

To view all licenses that are assigned to a user click on the user and then license details.

All licenses assigned to that user will then be listed along with the start date, end date and which version they are using.

Jenna Wimshurst License Usage

All licenses assigned to this user. A user can have only one permanent license per application. When adding a new permanent license, all existing permanent licenses for the same application will be deleted.

License	Start Date	EndDate	Expires	Version
UnityAgent Enterprise	2019.08.08	Active License		7.5.5.0
UnityAgentWeb Standard	2019.05.17	Active License		1.0.18
UnityContactCenterAgent Add-On	2019.08.08	Active License		
UnityDesktop Enterprise	2019.12.23	Active License		7.5.5.0
UnityDesktopWeb Standard	2019.08.28	Active License		1.0.14
UnityMobile Standard	2019.05.14	Active License		2.1.12
UnityReception Enterprise	2019.09.05	Active License		7.4.1.0
UnitySupervisor Enterprise	2019.07.17	Active License		7.5.1.0

Here you can manually add a license assignment by clicking the add assignment button and selecting the license type from the drop-down menu.

UnityReception Enterprise	2019.09.05
UnitySupervisor Enterprise	2019.07.17

OFF Include Inactive

Add Assignment

Please note that only the licenses that the user doesn't have will be present. Simply select which license you want to add then click Add Assignment.

Details Branding License Details History Log Call Center Activity

New License Assignment

Only permanent licenses can be assigned or deleted.

User Name — Jenna Wimshurst

License — UnityAgent Standard ▼

UnityAgent Standard
UnityCallLogger Standard
UnityContactCenterAgent Enterprise (Internal Use)
UnityContactCenterDesktop Enterprise
UnityContactCenterReception Enterprise
UnityContactCenterSupervisor Add-On
UnityCrmIntegration Bundle
UnityDashboard Graphical
UnityDashboard Graphical100
UnityDashboard Graphical100+
UnityDashboard Graphical30
UnityReception Standard

Start Date

Expiry Date

Last Used Version

Cancel Add Assignment

9. RESELLERS/GROUPS/USERS TAB

View, add, update and delete the resellers, groups or users in the list, depending on which level of the hierarchy you are currently logged in as.

You can import Users at the Group level by clicking the "Import Users" button then uploading a CSV file.

10. HISTORY LOG

View all actions relating to the System Provider, Reseller, Group or User level. The history log will show all actions performed by both the System and the portal Users.

11. USER TEMPLATES

Templates are usually assigned to users at the Group level but they can also be assigned at the Reseller and System Provider level. However, this will then be cascaded down the hierarchy to all the users under the Resellers. Therefore, we recommend that you assign Templates at the Group or User level.

12.   KNOWLEDGE BASE

The knowledge base provides a variety of articles relating to all Unity products. Articles include solutions to issue reports, technical documents and white papers.

Unity Application Suite Knowledge Base

Search online for articles relating to all products in the Unity application suite. Click the title to view the article in full.

Application		Version	
All Applications	▼	All Versions	▼
Category		Keywords	
All Categories	▼		🔍

Add Article

Simply select the application, version and category from the drop-down menu then click Search. You can also add in any keywords for more filtered results.

13.   NOTIFICATIONS

Unity License Consumption reminders are listed on the Notification page along with the latest news, releases and feature requests from Unity. When you first log into the Portal, you will be taken to the Notifications page.

Notifications

Filter By Provider   [All Providers ▼]   Add Notificati   Delete All

Unity License Consumption Reminder

This notification is to inform you that the below licenses have been consumed. If you wish to purchase more of these licenses please email your purchase order to Kakapo Systems. License type: UnityDesktopWeb Standard Licenses purchased: 100 Licenses consumed: 100 Licenses remaining: 0 Consumption: 100.00 Current number of trial licenses in use: 0

Entered by chris.tutt at 2020.01.07 02:00:14

The Notifications will remain on the page until they are removed. To delete a Notification, simply click Remove.

14.   INVOICES

At the System Provider, Reseller and Group level, the invoices page lists all unpaid invoices along with the invoice number, date and value.

You can also view paid invoices by ticking the box and clicking View PDF.

Invoices

	Invoice Number	Invoice Date
View PDF	P-4485	2019.06.04
View PDF	P-4371	2019.03.27
View PDF	P-4098	2018.06.30

15. TROUBLE SHOOTING

If you get any of the below errors, there could be a simple explanation:

- o A **license expired error** when the license has not expired could be because the wrong server host address has been entered. Please check the server host name and restart Unity.

- o If the user gets a **license expired error** and the server hostname is correct then you need to check which Unity application the user is running as they may have changed the Start-up application. E.g. A user had a Reception license but accidently changes their Start-up application to Desktop, a Desktop trial license will automatically start. At the end of the trial duration the user will be presented with the license expired error - they would need go into Unity settings and change their start up application back to Reception.

- o If **Groups can't see the other Groups** under the same Enterprise, then the "Enterprise View Available" box in the System Provider's Branding tab has not been ticked. Tick the box, click Update then restart Unity.