

# UNITY RECEPTION CALENDAR INTEGRATION

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### Unity Reception Standard

- o Microsoft Outlook integration to display the required users calendar events

### Unity Reception Enterprise

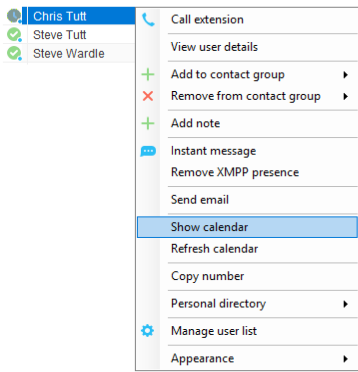
- o Outlook, Office365 and Exchange Calendar integration to display the required users calendar events

Unity can be configured to connect directly with an Outlook, Exchange or Office365 platform in order to display appointments/meetings (referred to as “Calendar events”) for any users within the Group or Enterprise that have shared their calendar with the account that Unity is using to integrate with the calendar platform. The email address of the user must exist in the BroadWorks user profile for monitored users, as this is how Unity links the BroadWorks user and the shared calendar.

There are four modes available:

- o Single account used to connect to Exchange server
- o Shared account (set in the Kakapo portal) used to connect to Exchange server
- o Single account used to connect to Office 365
- o Shared account (set in the Kakapo portal) used to connect to Office 365

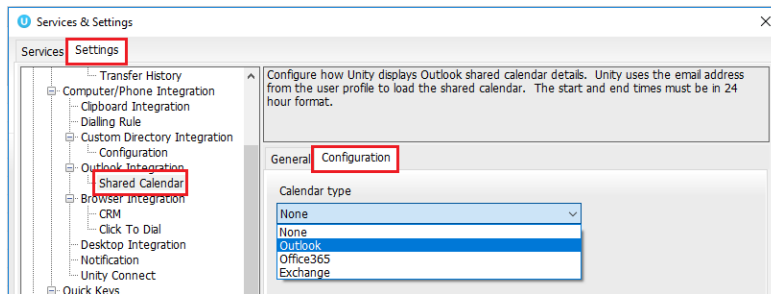
Please note: the option to Show Calendar will only be available for monitored users who have an email set in their VoIP profile.



	Today	Tomorrow
09:00 - 10:00		
10:00 - 11:00	Email integration with Unity CC (Office)	
11:00 - 12:00	Go through Unity issue and setup test environment...	Estimated release date for Email required by Patric...
12:00 - 13:00		
13:00 - 14:00		
14:00 - 15:00		
15:00 - 16:00	Monthly call to discuss Unity (Conference   Phone: (506) 804 2409   ID: 408064#)	Mothers day Sunday
16:00 - 17:00		
17:00 - 18:00	Out with India team	
18:00 - 19:00		

## 1. SETUP

To setup the shared calendar go to Settings>Settings>Shared Calendar, as shown below.

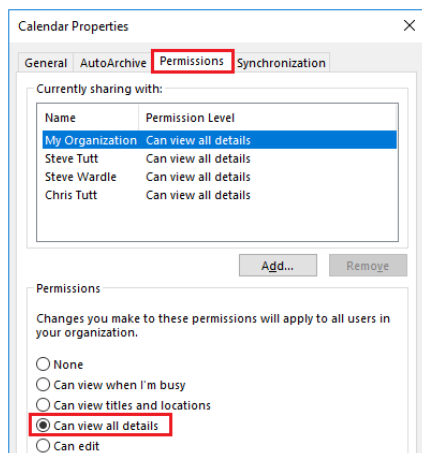


### Outlook

To integrate an Outlook calendar, select Outlook from the drop-down menu and then press Ok. Unity will connect to the Outlook client that is running on the local machine.



In order to display the calendar, Unity requires “full details” access to read the calendar, it is recommended that the Reviewer permission level be set for the receptionist to all calendars that Unity needs to display – This could be everyone in the organisation.



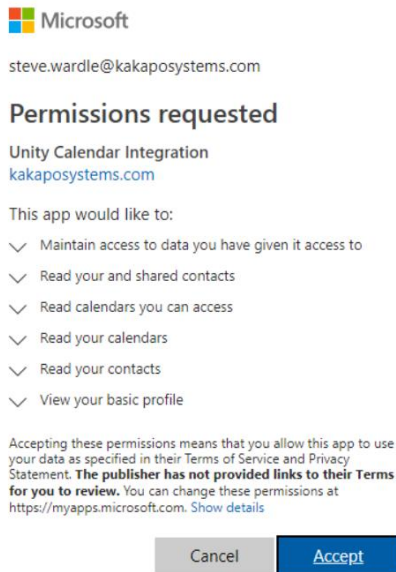
Once the calendar request has been sent, the colleague will need to pop open up the email invitation and click Accept.

## Office 365

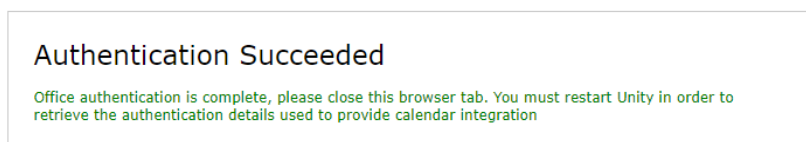
To integrate an Office365 calendar, select Office365 from the drop-down menu and then click authorise.



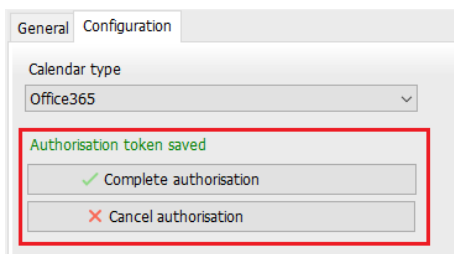
The default internet browser will then ask you to login to your Office365 account to authorise the token. Login and then click Accept to accept the requested permissions.



A notification will then appear alerting the user that the authorisation has been successful, as shown below.



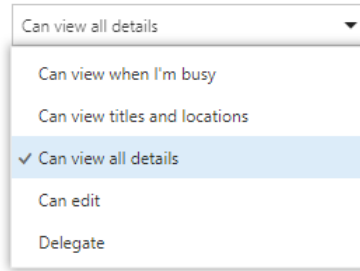
Go back to Unity Reception and select Complete authorisation, then click OK.



The shared permissions will need to be set at either View All Details, Can edit or Delegate. Unity will not show the calendar events for a user that only has view titles and location or I'm busy selected.



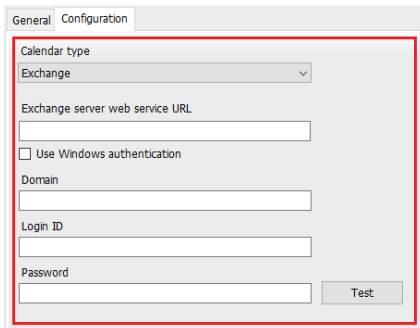
Steve Wardle  
steve.wardle@kakaposystems.com



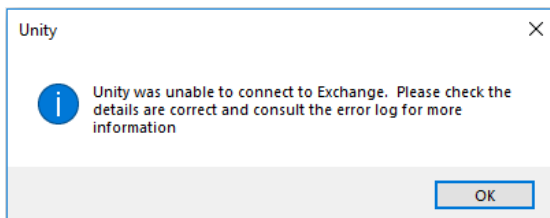
Once the calendar request has been sent, the colleague will need to pop open up the email invitation and click Accept.

## Exchange

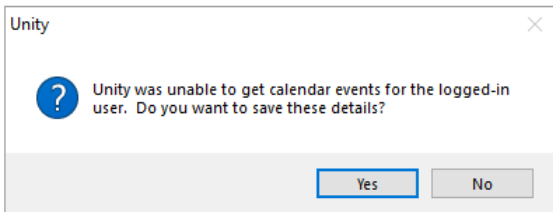
To setup an Exchange calendar, select Exchange from the drop-down menu, enter your server web service URL and login details, and then click Test.



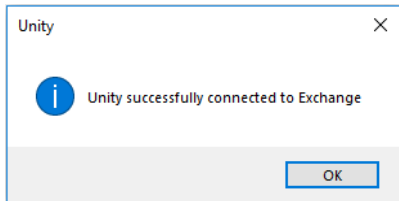
If the test is unsuccessful, you will receive the below alert.



If you have entered an Exchange email address which is different to the email address saved in the user's BroadWorks profile, then the below alert will appear. Simply click Yes, to continue with the shared calendar integration.

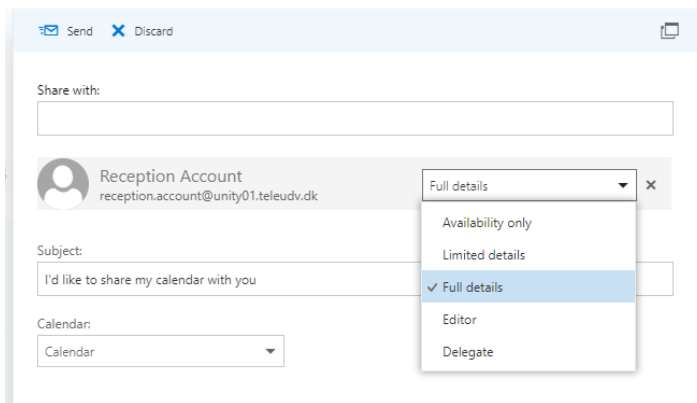


If the test is successful then Unity will alert you that it has successfully connected to Exchange, click OK and then OK again.

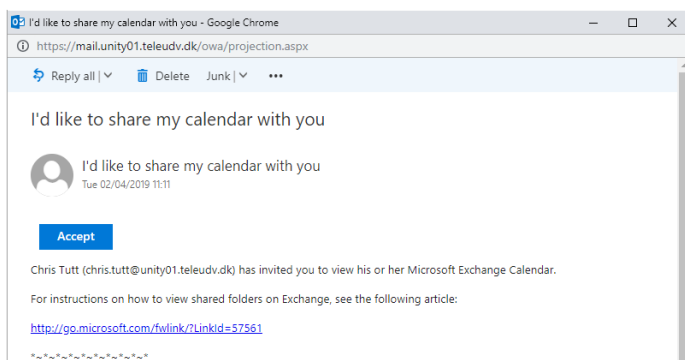


### Shared Calendar in Exchange

The shared permissions will need to be set at either Full Details, Editor or Delegate. Unity will not show the calendar events for a user that only has Limited Details or Availability only.



Once the calendar request has been sent, the colleague will need to pop open up the email invitation and click Accept.



### Portal Calendar Integration

If all receptionists under the Reseller or Group level share the same account for Exchange or Office365 then the calendar integration can be set in the Kakapo portal under the Branding tab.

## Shared Calendar Integration

Calendar Type

Office365  
Office365  
Exchange Server

Authorize Office365 Not authorized

Select either Exchange Server or Office365 from the drop-down menu. For Exchange, enter the relevant details and then click update at the bottom of the page:

### Shared Calendar Integration

Calendar Type Exchange Server Please contact your Exchange administrator if you are not sure of the web service URL

Exchange Server Web Service URL This URL should end with /Exchange.asmx

Use Windows Account

Domain

Login ID

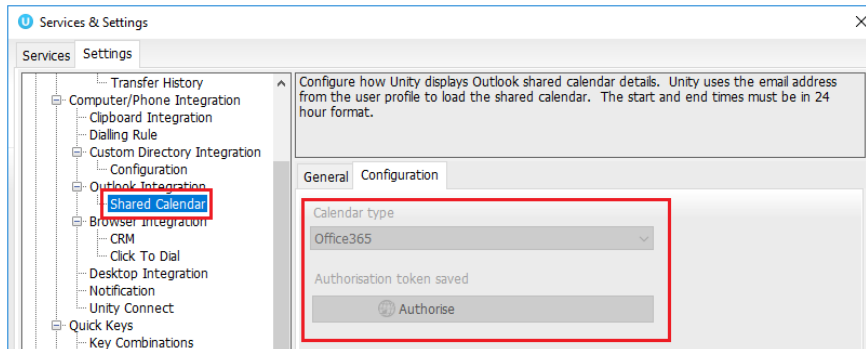
Password

Confirm Password

For Office365, click Authorize Office365 and follow the steps to authorize the token. Once the authorisation has been successful, click update at the bottom of the Branding page.

This will mean that all Reception users under the Group or Reseller level (depending which level you have configured the calendar integration at) will be integrated with that shared calendar.

Therefore, the Reception users will no longer be able to set the calendar integration in their own Unity settings as it will be greyed out, as shown below.



To delete the authorisation in the portal, simply click Clear and then OK at the top.

Prevent User From Joining Call Centers

Record Call Center Events

Report Viewer Is Available

User Can Choose To See Queued Calls

Statistics Refresh Frequency Range (seconds) 120 to 900

Shared Calendar Integration

Calendar Type Office365 Authorize Office365 Authorized (clear)

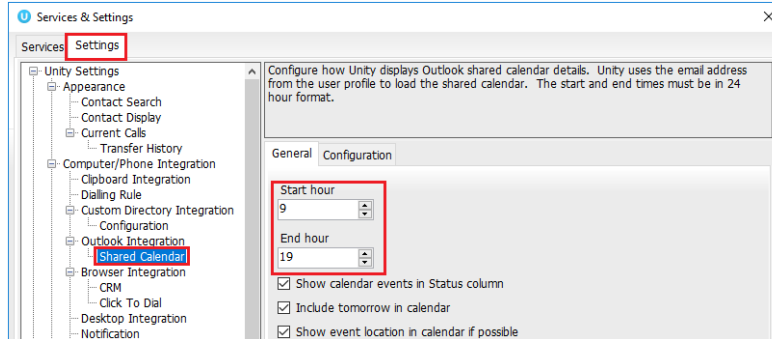
portal.unityclient.com says  
Are you sure you want to delete this OAuth token? This may stop shared calendars from being displayed in Unity

OK Cancel

## 2. CONFIGURATION

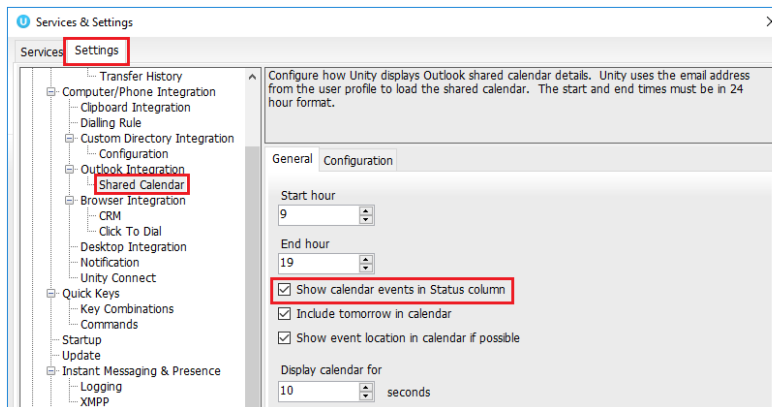
### Start and End hour

Unity can be set to only show calendar events between certain times, in the example below only meetings between 9am and 7pm will be shown.



### Show Calendar Events in Status Column

Show calendar events in the status column will be selected by default and only displays whether or not the user is in a meeting and until what time, as shown below.



Name	Phone	ACD State	Status
Chris Tutt	02078615810	Sign-Out	I am in a meeting until 17:00
Steve Tutt	02078615811	Sign-Out	
Steve Wardle	02078615813	Unavailable - Comfort Break	

Please note: If you are using Outlook to share calendar events then the option to show calendar events in the status column is not available.

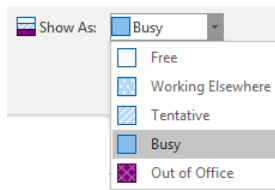
### Monitored Users Calendar Display

If the monitored user has a full day event, then Unity will display that they are in a meeting all day.

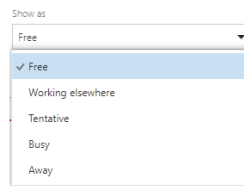
Kendrick Hester	0086	Sign-Out	
Chris Tutt	02078615810	Sign-Out	I am in a meeting all day today
Steve Tutt	02078615811	Sign-In	

Monitored User icons will change depending on the status that have been selected for that particular meeting.

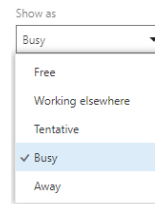
Outlook:



Exchange:



Office365:



Free =

Working Elsewhere =

Tentative =

Busy =

Out of office/Away =

To find out more information, the Reception user will need to right click the user and select Show Calendar. If the “Show event location in calendar if possible” box is ticked in settings then Unity will show the location of the events, if one has been specified.

Name	Phone	
Chris Tutt	02078615810	
	Today	Tomorrow
09:00 - 10:00		
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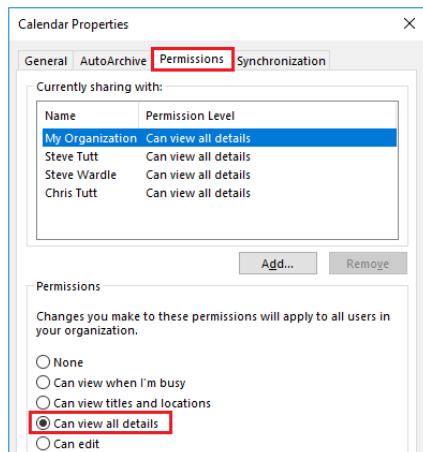
### 3. TROUBLESHOOTING

- If Unity is unable to load the calendar for a monitored user this popup will be shown. This indicates that an error occurred while loading the calendar, most likely because it is not shared with the receptionist or permissions are inadequate.

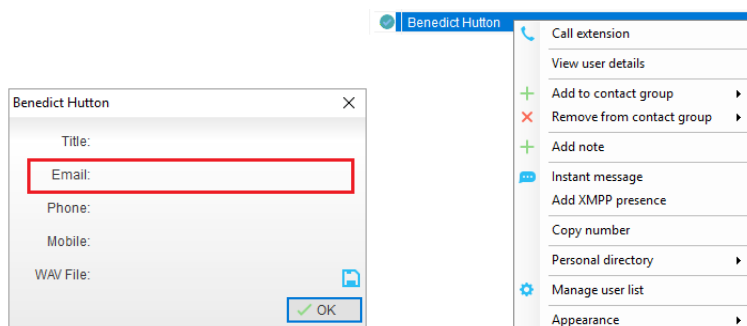
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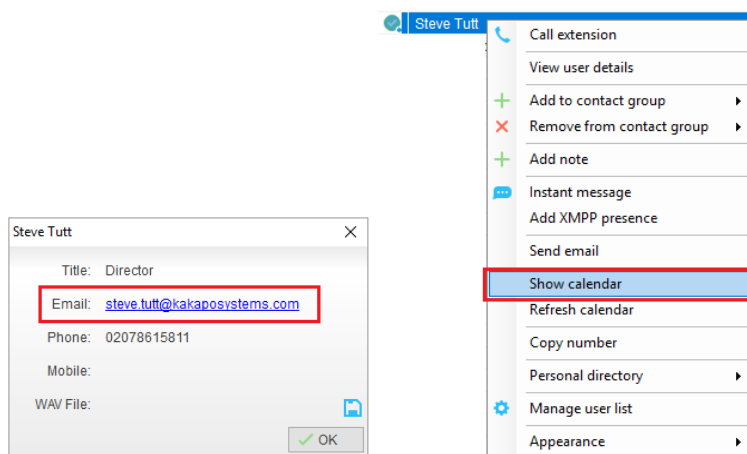
In order to display the calendar, Unity requires “full details” access to read the calendar, it is recommended that the Reviewer permission level be set for the receptionist to all calendars that Unity needs to display – This could be everyone in the organisation.



- If the option to Show Calendar is not available, then that monitored user might not have an email set in their VoIP profile.



Once the monitored user has set an email in their VoIP profile, then Unity will display the options to Send an email, Show calendar and Refresh calendar.



- If you move from Exchange to Office 365 you will have to re-share the calendar events.