

# UNITY RECEPTION CALENDAR INTEGRATION

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## Contents

<b>1. Setup</b> .....	3
Outlook.....	3
Office 365 .....	4
Exchange .....	5
Portal Calendar Integration .....	6
<b>2. Configuration</b> .....	8
Start and End hour .....	8
Show Calendar Events in Status Column .....	8
Monitored Users Calendar Display .....	9
<b>3. Troubleshooting</b> .....	10

## Unity Reception Standard

- Microsoft Outlook integration to display monitored user calendar events

## Unity Reception Enterprise

- Outlook, Office365 and Exchange Calendar integration to display monitored user calendar events

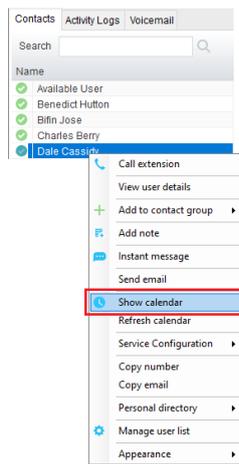
Unity can be configured to connect directly with the locally installed Outlook application, or an Exchange Server or Office365 instance in order to display appointments/meetings (referred to as “calendar events”) for any users within the Group or Enterprise that have shared their calendar with the account 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:

- Single account used to connect to Exchange server
- Shared account (set in the Kakapo portal) used to connect to Exchange server
- Single account used to connect to Office 365
- 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, and if Unity has received calendar events for that user.

Unity will use colour to show the availability state for each calendar event, as shown below.



	Today	Tomorrow
09:00 - 10:00		
10:00 - 11:00		
11:00 - 12:00	ACD Stats	
12:00 - 13:00		Quarterly Review - Bookkeeping Services
13:00 - 14:00		Contact Center Training
14:00 - 15:00	Portal Layouts Call	
15:00 - 16:00		Planning Session
16:00 - 17:00	Vodafone Iceland & Unity catch-up (Microsoft Teams Meeting)	Unity Reception Demo
17:00 - 18:00		
18:00 - 19:00		

Free: Green

Tentative: Orange

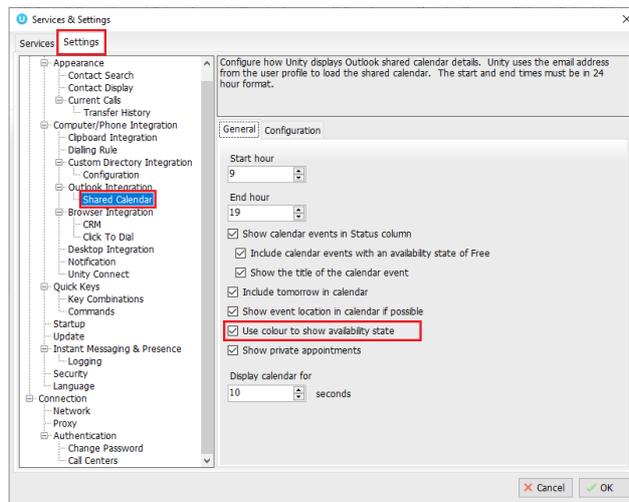
Busy: Red

Away /Out of Office: Grey

Working Elsewhere: Grey

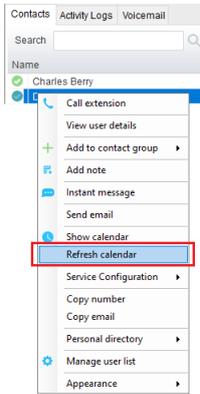
Anything else: Blue

The default is set to show the above color scheme, but this can be changed in Unity settings, as shown below.



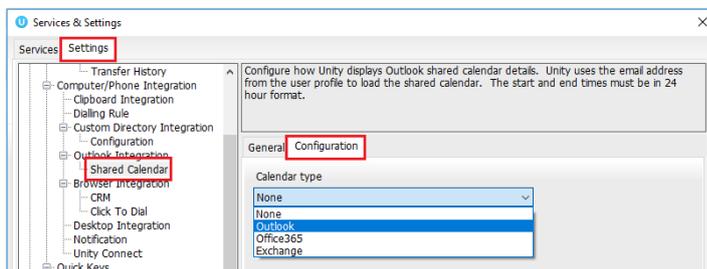
Unity loads all calendar events for the next two days into memory on startup, and periodically refreshes this list. This is because Unity updates the status of the monitored user using calendar events every minute (when configured), so there would be significant overhead in fetching shared calendar events for all monitored users every minute.

However it is possible that the shared calendar can become out-of-date, for example if a meeting has recently been added into the shared calendar of a monitored user. Therefore the user can force Unity to immediately refresh the calendar as shown below.



## 1. SETUP

To setup the shared calendar open Unity Settings > Settings tab > Shared Calendar, as shown below.

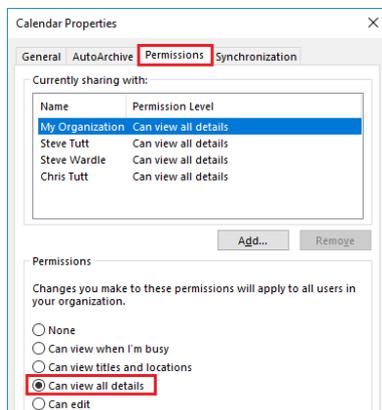


### Outlook

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.



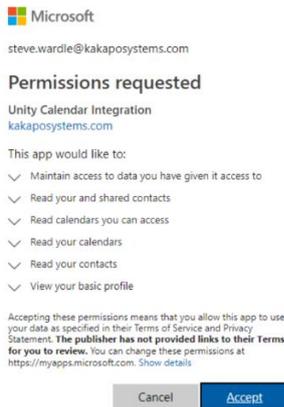
Once the calendar sharing request has been sent, the colleague will need to open the email invitation and click Accept, as calendar sharing isn't activated until this step is done.

## Office 365

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

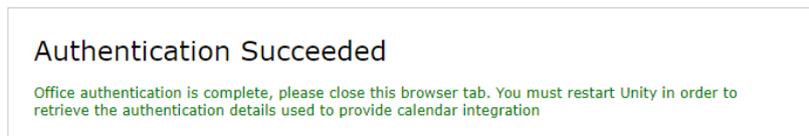


The default internet browser will then ask you to login to your Office365 account to authorise the token. Login and then click Accept to accept the requested permissions.

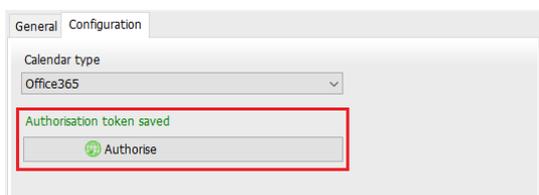


**Please Note:** The Microsoft 365 Family subscription does not support shared calendars. Calendar integration through Office365 requires a Microsoft 365 Business subscription. If the “Read calendars you can access” permission is not listed in the above prompt then the Microsoft 365 subscription doesn’t support shared calendar integration.

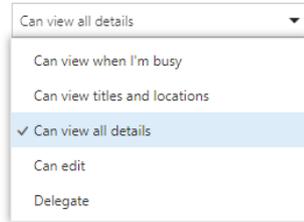
A notification will then appear in the browser confirming that the authorisation has been successful, as shown below.



Unity Reception will automatically update to show that the token has been saved and downloaded to the client for use.



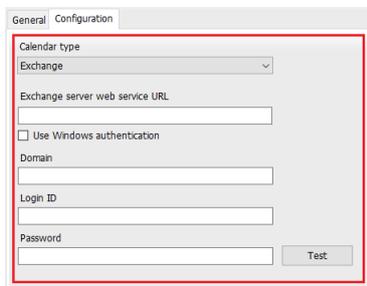
Permissions for shared calendars must be set as either “View All Details”, “Can edit” or “Delegate”. Unity will not show the calendar events for a user that only has “Can view titles and location” or “Can view when I’m busy” selected.



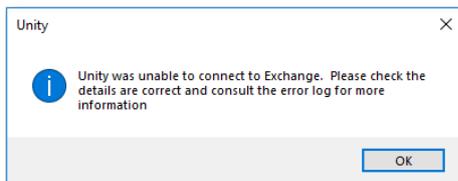
Once the calendar sharing request has been sent, the colleague will need to open the email invitation and click Accept, as calendar sharing isn't activated until this step is done.

## Exchange

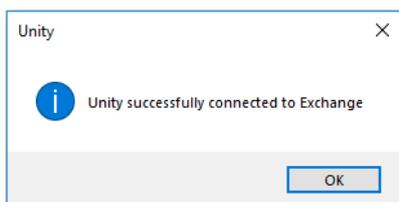
To setup an Exchange calendar, select Exchange from the drop-down menu, enter your server web service URL and login details, and then click Test. Please note the Exchange server web service URL field will be different per Exchange Server instance, this must be confirmed by an Exchange administrator if unknown.



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

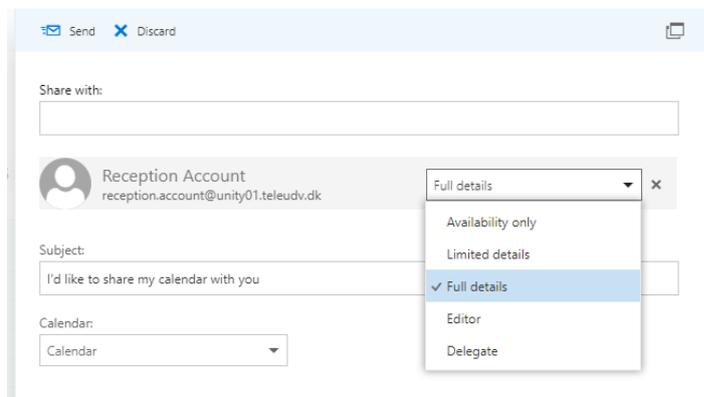


If the test is successful then Unity will alert you that it has successfully connected to Exchange, click OK and then OK again.

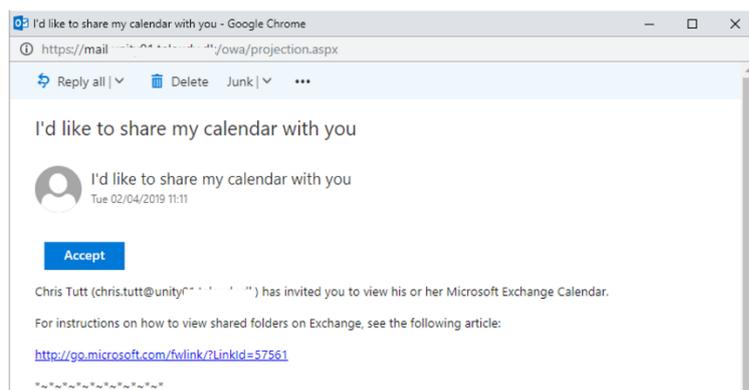


## Shared Calendar in Exchange

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 has “Limited details” or “Availability only” permission to the shared calendar.



Once the calendar sharing request has been sent, the colleague will need to open the email invitation and click Accept, as calendar sharing isn't activated until this step is done.



## 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

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:

Use Windows Account:  OFF

Domain:

Login ID:

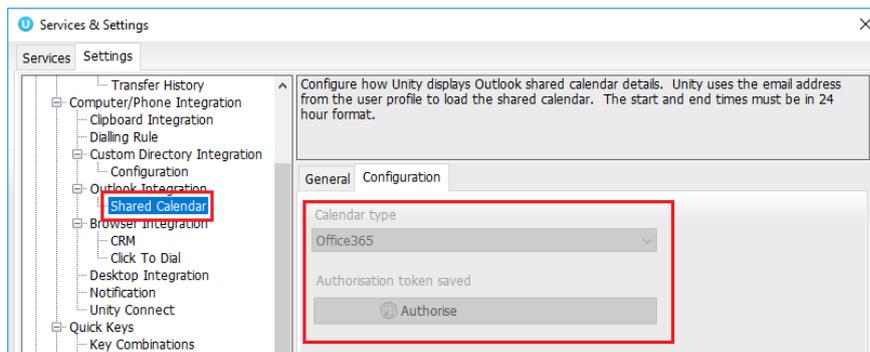
Password:

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 Unity Reception users under the Group or Reseller (where calendar integration has been configured) will use that account to view shared calendars.

If shared calendar integration is configured at the Group or Enterprise level, the Unity Reception users will no longer be able to set the calendar integration in Unity settings as it will be greyed out, as shown below.



To delete the authorisation in the portal, simply click Clear and then OK when prompted.

Shared Calendar Integration

Calendar Type: Office365 Authorize Office365 Authorized (clear)

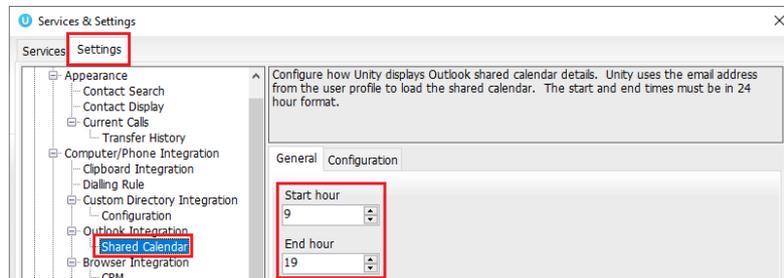
**Warning**

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

## 2. CONFIGURATION

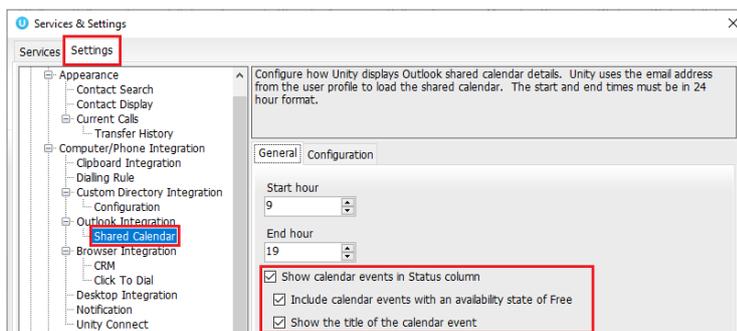
### Start and End hour

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

The option to show calendar events in the status column (including those with the availability state set to "Free") will be selected by default and displays the nature and end date/time of the meeting, as shown below.



Unity will use a generic text in the Status column if the meeting title is not configured to be displayed

Name	Phone	ACD State	Status
Steve Tutt	02086192471	Sign-Out	I am in a meeting until 21:00

Including the title provides information about the nature of the meeting

Name	Phone	ACD State	Status
Steve Tutt	02086192471	Sign-Out	Sales Meeting until 21:00

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.

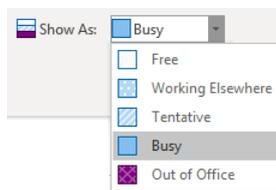
Name	Phone	ACD State	Status
Dale Cassidy	0011		Sales Conference all day today

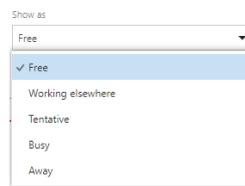
Name	Phone	ACD State	Status
Dale Cassidy	0011		I am in a meeting all day today

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

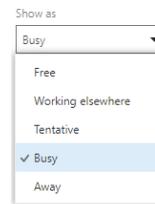
Outlook:



Exchange:



Office365:



Free = 

Working Elsewhere = 

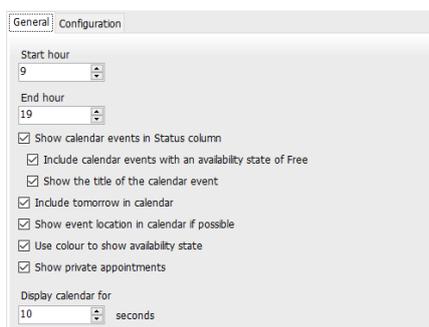
Tentative = 

Busy = 

Away/Out of Office = 

To see the entire calendar, the receptionist can right click the monitored user and select Show Calendar. A popup will be displayed for the duration configured in Unity Settings, then will automatically hide. If the user clicks anywhere outside the calendar popup it will be immediately hidden.

The shared calendar popup can be configured through Unity Settings.



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			
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:	Annual Leave	
16:00 - 17:00			
17:00 - 18:00	Out with India team		
18:00 - 19:00			

The calendar display can be configured to show either today only, or today and tomorrow.

	Today	Tomorrow
09:00 - 10:00		
10:00 - 11:00		
11:00 - 12:00	ACD Stats	
12:00 - 13:00		Quarterly Review - Bookkeeping Services
13:00 - 14:00		Contact Center Training
14:00 - 15:00	Portal Layouts Call	
15:00 - 16:00		Planning Session
16:00 - 17:00	Vodafone Iceland & Unity catch-up (Microsoft Teams Meeting)	Unity Reception Demo
17:00 - 18:00		
18:00 - 19:00		

	Today
09:00 - 10:00	
10:00 - 11:00	
11:00 - 12:00	ACD Stats
12:00 - 13:00	
13:00 - 14:00	
14:00 - 15:00	Portal Layouts Call
15:00 - 16:00	
16:00 - 17:00	Vodafone Iceland & Unity catch-up (Microsoft Teams Meeting)
17:00 - 18:00	
18:00 - 19:00	

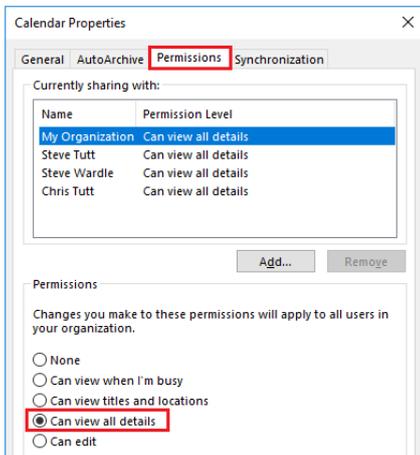
Private meetings can also be shown or hidden in Unity, this applies to both the Status column and shared calendar popup.

### 3. TROUBLESHOOTING

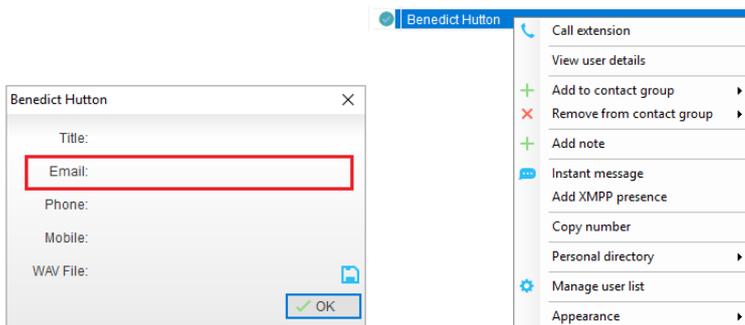
- If Unity is unable to load the calendar for a monitored user this popup will be shown. This indicates that an error occurred while loading the calendar, most likely because it is not shared with the receptionist or permissions are inadequate.

	Today	Tomorrow
09:00-10:00		
10:00-11:00		
11:00-12:00		
12:00-13:00		
13:00-14:00		
14:00-15:00		
15:00-16:00		
16:00-17:00		
17:00-18:00		
18:00-19:00		

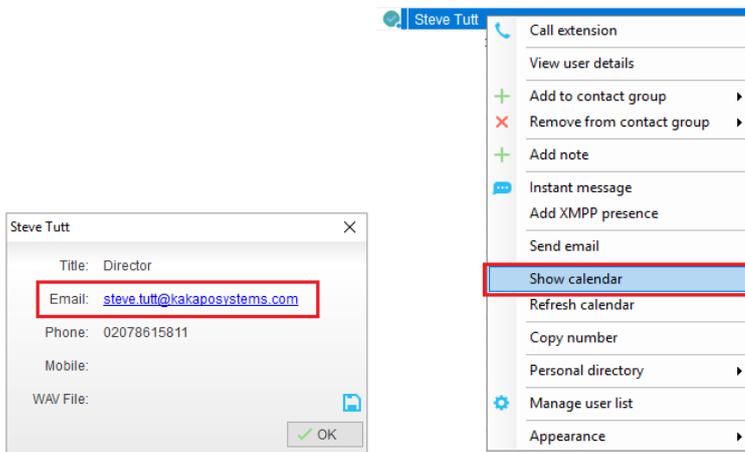
In order to display the calendar, Unity requires “Full details” access to the calendar, it is recommended that the Reviewer permission level be set for the receptionist to all calendars that Unity needs to display – This could be everyone in the organisation.



- 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.



- Permission sharing is not persisted when migrating from Outlook or Exchange Server to Office365. In this case all calendars will need to be re-shared.