

# UNITY RECEPTION CALENDAR INTEGRATION

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## Unity Reception Standard

 $\circ$   $\,$  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:

- o 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
- $\circ$  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.

Contacts	Activity Lo	gs Voicemail	
earch		Q	
lame			
Avail	able User		
Bene	edict Hutton		
Bifin	Jose		
Char	les Berry		-
Dale	6000	Call extension	
		View user details	
	+	Add to contact group	×
	<b>F</b> .	Add note	
	m	Instant message	
		Send email	
		Show calendar	
		Refresh calendar	
		Service Configuration	•
		Copy number	
		Copy email	
		Personal directory	•
	0	Manage user list	

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.

Services & Settings		
rvices Settings		
Appearance     Contact Search     Contact Display     Outrant Calls     Lurrent Calls     Lurrent Flistory	<ul> <li>Configure how Unity displays Outbook shared calendar details. Unity uses from the user profile to load the shared calendar. The start and end time hour format.</li> </ul>	the email address is must be in 24
<ul> <li>Computer/Phone Integration</li> <li>Clipboard Integration</li> </ul>	General Configuration	
Dialing Rule     Custom Directory Integration     Configuration	Start hour	
Outlook Integration     Shared Calendar     Browser Integration	End hour	
CRM Click To Dial	Show calendar events in Status column	
- Notification	✓ Include calendar events with an availability state of Free ✓ Show the title of the calendar event	
Quick Keys     Key Combinations	☐ Include tomorrow in calendar	
Commands Startup	Show event location in calendar if possible	
Update     Instant Messaging & Presence     Logging	Show private appointments	
Security Language	Display calendar for	
- Vetwork		
Authentication     Change Password		
· Call Centers	×	

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.

Contacts	Activity Logs Voicemail	
Search		
Name		
Char	les Berry	
الا ر	Call extension	
	View user details	
+	Add to contact group	•
۲.	Add note	
ø	Instant message	
	Send email	
0	Show calendar	
	Refresh calendar	
	Service Configuration	÷
	Copy number	
	Copy email	
	Personal directory	•
•	Manage user list	

## 1. SETUP

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

U Services & Settings			>
Services Settings			
Transfer History     Computer/Phone Integration     Clipboard Integration     Dialing Rule     Outpoint Directory Integration	^	Configure how Unity displays Outbok shared calendar detals. Unity uses the email address from the user profile to load the shared calendar. The start and end times must be in 24 hour format.	
Configuration		General Configuration	
Shared Calendar		Calendar type	
- CRM		None ~	
Click To Dial Desktop Integration		None Outlook	
Notification Unity Connect		Office365 Exchange	
Ouick Keys			

## 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.

General	Configuration	
Calend	ar type	
Outloo	k	~

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.

alendar Properties		2
General AutoArch	nive Permissions Synchronization	
Currently sharing	with:	
Name	Permission Level	
My Organizatio	n Can view all details	
Steve Tutt	Can view all details	
Steve Wardle	Can view all details	
Chris Tutt	Can view all details	
Permissions	A <u>d</u> d Remo <u>v</u> e	2
Changes you mak your organization	ke to these permissions will apply to all users ir n.	ı
ONOne		
Can view whe	n i'm busy	
○ Can view titles	s and locations	
Can view all d	etails	
5		

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.

General	Configuration	
Calend	ar type	
Office3	865	~
Author	risation token n	ot present
	② Authoris	se
<u> </u>		

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.



<u>Please Note:</u> 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.

Authentication Succeeded	
Office authentication is complete, please close this browser tab. You must restart Unity in order to retrieve the authentication details used to provide calendar integration	

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

General Configuration	
Calendar type	
Office365	$\sim$
Authorisation token saved	
Q) Authorise	

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.



eve	Wardle	
eve.wa	ardle@kakaposystem	s.con

Can view all details		
Can view when I'm busy		
Can view titles and locations		
✓ Can view all details		
Can edit		
Delegate		

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.

General Configuration	
Calendar type	
Exchange	$\sim$
Exchange server web service URL	
Use Windows authentication	
Domain	
Login ID	
L	
Password	
	Test



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.

Send 🗙 Discard		I
Share with:		
Reception Account reception.account@unity01.teleudv.dk	Full details	• ×
Subject:	Availability only Limited details	
I'd like to share my calendar with you	✓ Full details	_
Calendar:	Editor	
Calendar 💌	Delegate	

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	0						
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.

Services & Settings		
ervices Settings		
Transfer History     Computer/Phone Integration     Cipboard Integration     Dialling Rule     Custom Directory Integration	<ul> <li>Configure how Unity displays Outlook shared calendar details. Unity uses the email addre from the user profile to load the shared calendar. The start and end times must be in 24 hour format.</li> </ul>	as I
Configuration		
	General Configuration	
Shared Calendar	Cleardar trac	
Browser Integration	Calendar type	
CRM	Office365 V	
- Click To Dial		
Desktop Integration	Authorisation token saved	
Notification		
Unity Connect	Authorise	
Quick Keys		
Key Combinations		

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



## 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.

Services Settings			
Appearance     Contact Search     Contact Display     Current Calls     Transfer History	^	Configure how Unity displays Outlook shared calendar details. Unity uses the email address from the user profile to load the shared calendar. The start and end times must be in 24 hour format.	
- Computer/Phone Integration - Clipboard Integration - Dialling Rule - Custom Directory Integration		General Configuration	
Configuration Courlook Integration Shared Calendar Browser Integration CRM		End hour 19	

#### 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.

anvicas Settings		
Appearance     Contact Search     Contact Display     Gurrent Calls     Tansfer History	Configure how Unity displays Outlook shared calendar detais. Unity us from the user profile to load the shared calendar. The start and end t hour format.	ses the email address times must be in 24
Computer/Phone Integration     Opboard Integration     Opboard Integration     Obtaing Rule     Custom Directory Integration     Outfook Integration     Outfook Integration     Browser Integration	General Configuration Start hour 9 End hour 19 \$	
CRM Cick To Dial Desktop Integration Notification Unity Connect	<ul> <li>Show calendar events in Status column</li> <li>Include calendar events with an availability state of Free</li> <li>Show the title of the calendar event</li> </ul>	

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

Contacts Activity Logs Voicemail				
Search steve Q				
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

Contacts	Activity Logs	Voicemail				
Search	steve		Q			
Name				Phone	ACD State	Status
Steve	e 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.

ontacts Activity I	ogs Voicemail				
Search dale		Q			
lame			Phone	ACD State	Status
Dale Cassidy			0011		Sales Conference all day today
Contacts Activity	Logs Voicemail				
Contacts Activity Search dale	Logs Voicemail	٩			
Contacts Activity Search dale Name	Logs Voicemail	٩	Phone	ACD State	Status

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

Outlook:	Exchange:	Office365:
	Chours an	Show as
Show As: Busy	Free -	Busy 👻
Free	✓ Free	Free
Working Elsewhere	Working elsewhere	Working elsewhere
	Tentative	Tentative
Busy	Busy	✓ Busy
Out of Office	Away	Away
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.

Nam	e		Phone
0	Chris Tutt		02078615810
2		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		Quartley 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		

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.

Calendar Propert	ties ×						
General AutoA	Archive Permissions Synchronization						
Currently sharing with:							
Name	Permission Level						
My Organiza	My Organization Can view all details						
Steve Tutt	Can view all details						
Steve Wardl	e Can view all details						
Chris Tutt	Can view all details						
Permissions	A <u>d</u> d Remo <u>v</u> e						
Changes you make to these permissions will apply to all users in your organization.							
ONone							
O Can view when I'm busy							
O Can view titles and locations							
Can view all details							
⊖ Can edit							

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

	Benedict H	utton 🐛	Call extension
			View user details
Benedict Hutton	×	+ ×	Add to contact group   Remove from contact group
Title:		+	Add note
Email:		<b>_</b>	Instant message
Phone:			Add XMPP presence
Mobile:			Copy number
MAV Eile:	-		Personal directory
WAV FILE.	ОК	٥	Manage user list

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.

	📿 Stev	e Tutt + × +	Call extension View user details Add to contact group Remove from contact group Add note
Steve Tutt	×	ø	Instant message Add XMPP presence Send email
Title: Director			Show calendar
Email: <u>steve.tutt@kakaposysten</u>	ns.com		Refresh calendar
Phone: 02078615811			Copy number
Mobile:			Personal directory
WAV File:		٠	Manage user list
	✓ ОК		Appearance >

 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.