

UNITY SUPERVISOR WEB GUIDE

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1 ABOUT UNITY SUPERVISOR WEB

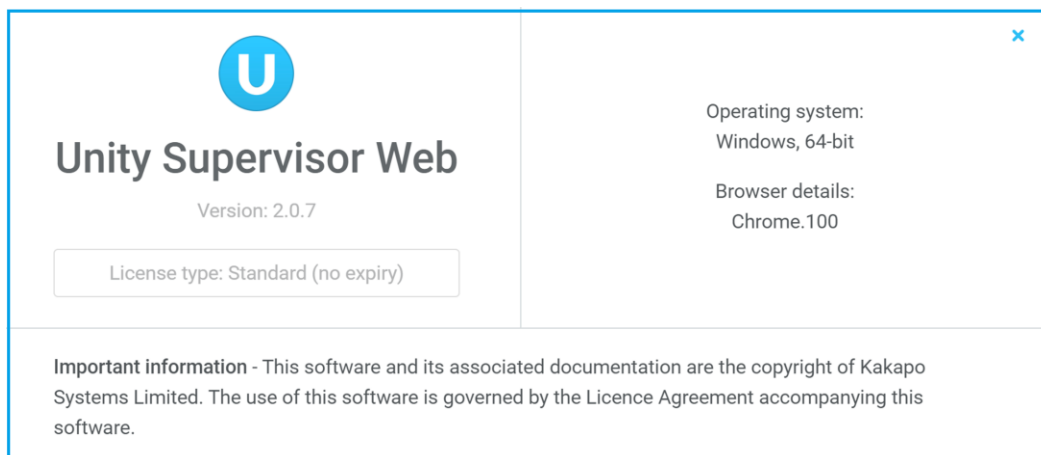
Unity Supervisor Web is a web-based end-user client designed for use within the BroadWorks call center environment. It provides a fully integrated hosted telephony environment, allowing a supervisor to monitor and manage all ACD queues [and the agents within those queues] that are assigned to as a supervisor in BroadWorks. The client also offers agent functionality if the Call Center Agent Standard/Premium service is assigned to the user.

1.1 Features

The features available are as follows:

- Full call control, directory integration and service configuration [as outlined in the Unity Desktop user guide], plus:
- Remotely change agent ACD state [Available, Unavailable, Wrap-Up etc.] and joined state for queues
- Silent Monitor
- Allows the Supervisor to set threshold alerts against queue and agent-level statistics

The current version can be found in Help > About Unity



1.2 Naming Conventions for this Help

- a. Call Center instances are also referred to as Queues in this guide
- b. ACD calls mean incoming calls into the call center/queue
- c. BWKS means the BroadWorks platform

1.3 System Requirements

1.3.1 Internet & Firewall

Unity Supervisor Web is fully supported by all major browsers such as Edge, FireFox, Chrome and Safari. End-users can browse to <https://supervisor.unityclient.com> in their browser.

Any Access Control Lists (ACLs) in the System Provider core must be configured to allow the below inbound connections from the Unity cloud:

- a. TCP port 2208 (or 2209 if the connection is secured using TLS) to the BroadWorks OCI interface if web clients are configured to use OCI over TCP/IP
- b. TCP port 8011 (or 8012 if the connection is secured using TLS) to the BroadWorks CTI server if web clients are configured to use the CTI protocol rather than XSI
- c. HTTP/HTTPS access to the BroadWorks OCI interface if web clients are configured to use OCI over SOAP
- d. HTTP/HTTPS access to the BroadWorks XSI interface if web clients are configured to use XSI rather than CTI

These connections will be established from one of two logical IP addresses, please ensure both IP addresses are allowed.

Primary IP Address: 185.17.172.185

Secondary IP Address: 85.13.237.8

1.3.2 BroadWorks Platform Requirements

Unity Supervisor Web is supported on BroadWorks R21 SP1 and above.

Connecting using XSI

The Xtended Service Interface (XSI interface) allows remote applications to integrate with Cisco BroadWorks to perform telephony-related actions and to be notified about telephony events against subscribers hosted in a Cisco BroadWorks-powered network. XSI can be accessed over HTTPS as well as over TCP/IP using the CTI interface.

Unity Web Apps are able to integrate with BroadWorks either using XSI over HTTPS or CTI over TCP/IP, in which case TLS is also supported.

CTI

Default port: 8011 (insecure), 8012 (secure)

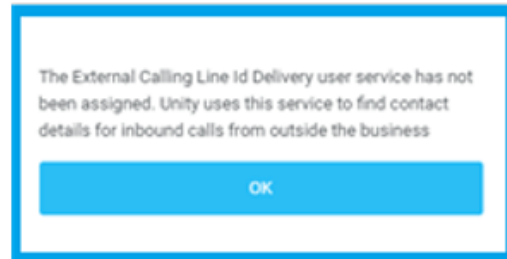
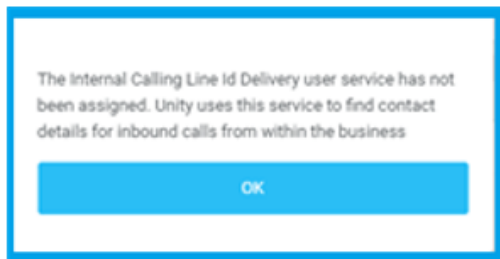
XSI/OCI OVER SOAP - HTTP/HTTPS

Default port:80 (insecure), 443 (secure)

1.3.3 BroadWorks License and Service Requirements

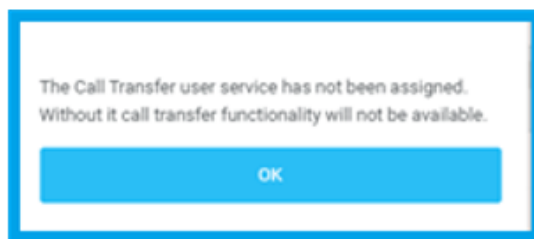
Internal calling line ID delivery & external calling line ID delivery

The Internal Calling Line ID Delivery and External Calling Line ID Delivery services should both be assigned as these services allow Unity to identify calls to/from other users in the business. If not assigned Unity will function, but the user will be prompted that this functionality will not be available.



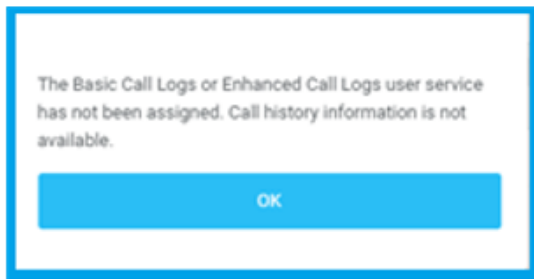
Call Transfer

The Call Transfer service is required in order to blind or announce transfer calls to internal and external numbers. Unity will alert the user if this service is not assigned.



Call Logs

The Basic Call Logs service must be assigned to the user in order to see dialed, received and missed calls. Unity will alert the user if this service isn't assigned.



1.3.4 Optional Services

Unity allows many user services to be utilized and configured in Tools > Settings. However, these services are not mandatory, so Unity will remove visibility of them if not assigned to the user. The below services are supported:

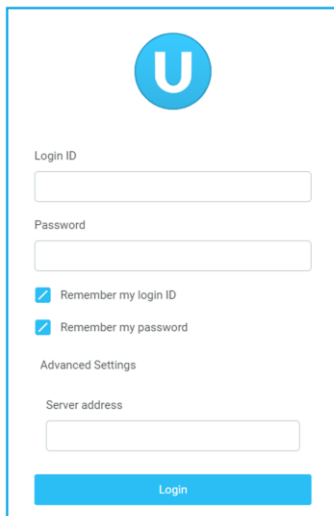
Service	Description
Anonymous Call Rejection	Prevent a caller from contacting you if they have explicitly hidden their phone number
Call Forward Always	Automatically forward all incoming calls to a number
Call Forward Busy	Automatically forward all incoming calls to a number when the user is on the phone
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
BroadWorks Anywhere	Connect mobile or fixed-line devices to the VoIP account, and switch calls between them
Call Waiting	Answer an incoming call when already on a 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.

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
Remote Office	Associate a mobile device to the VoIP account to make or receive calls
Flexible Seating Guest	Users can associate with a Flexible Seating host in Settings or from the drop list in the main Unity UI
Voice Messaging User	Provide voicemail for unanswered incoming calls
External/Internal Calling Line ID Delivery	Provides Calling Line ID information of an incoming call from outside the group

2 Initial Setup

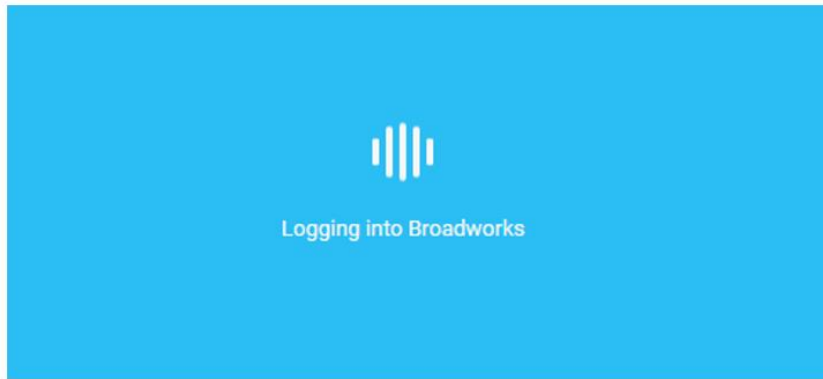
The first time Unity is started you will be prompted to enter the configuration details, as shown below. Unity can then retain the connection and authentication details for later use. The login ID and password will be assigned from your Service Provider.

You may also be prompted for the server address for your Service Provider. However this can be preconfigured for your System Provider in which case it will be prepolulated and the Advanced Settings section will be hidden.



Enter your login ID and password and the BroadWorks Server Address as specified by your Service Provider [if displayed].

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



2.1 Call Center Login Details

Once you are logged into Unity, it will connect to the host BroadWorks system and populate all the Call Center Instance IDs for the call centers that the user is a member of as shown below. This will include call centers that the user is associated to as an agent, a supervisor, or both.

To access this panel click Tools > Settings from the main window, then click the Settings tab, then click Call Centers under Authentication

A screenshot of the "Settings" window in a software application. The window has a title bar with "Services" and "Settings" tabs, and a close button. On the left is a sidebar with "Unity Settings" and "Connection" sections. Under "Unity Settings", there are links for "Appearance", "Contact Search", "Computer/Phone Integration", and "Language". Under "Connection", there are links for "Network", "Authentication", and "Call Centers". The "Call Centers" link is highlighted with a red box. The main area of the window contains a search bar, a description of call center authentication details, a "Default password" field, a "Call Center Login Details" section with a list of call centers (Development Queue, Holiday Cruises, Kakapo Sales, Kakapo Support) each with a green checkmark, and an "Alert me when a call center login fails" checkbox. At the bottom right are "Cancel" and "Save" buttons.

The password for each call center must be added in order to populate the call centers in the Personal Wallboard. Double click a call center to add the password. Where the password is the same for each call

center click the “Apply to all queues without a password” box and restart. Unity will now login as the call center queues and you will see these begin to populate the Personal Wallboard.

2.2 Call Center Login Default Password

If all call center passwords are the same, use the default password option. Enter the password for the call centers so that when a new call center is added in the future the supervisor doesn’t have to enter the call center password as Unity will do this automatically. Please note that all call center passwords have to be the same for this option to work.

The screenshot shows the 'Settings' tab in the 'Services' section of the Unity interface. The 'Call Center Login Details' section is highlighted with a red box. It contains a 'Default password' field with a masked password '*****'. Below this, there is a list of call centers with green checkmarks indicating they are configured: Development Queue, Holiday Cruises, Kakapo Sales, and Kakapo Support. A checkbox labeled 'Alert me when a call center login fails' is also present and unchecked. The 'Unity Settings' sidebar on the left shows 'Computer/Phone Integration' selected under 'Connection'.

Please use the Contact Center tab in the Branding section in the Kakapo Partner Portal to set a default password for all your Call Centers. This can be configured at the System Provider, Enterprise and Group levels

The screenshot shows the navigation bar of the Kakapo Partner Portal. The 'Branding' tab is selected and highlighted with a blue box. Other tabs include 'Details', 'Automatic Assignment', 'Portal User Accounts', 'License Details', 'Users', 'History Log', and 'Contact Center'.

Customisation
Contact Center

Default ACD Password LeeFallonKakapo1

Get Reason Codes URL

Set Reason Codes URL

Prevent User From Joining Call Centers OFF

Report Viewer Is Available ON

User Can Choose To See Queued Calls ON

Statistics Refresh Frequency Range (seconds) 120 to 900

3 UNITY SUPERVISOR WEB INTERFACE OVERVIEW

Unity is split into six functional areas; ACD Buttons, Call Control buttons, Personal Wallboard, Active Call Window, Contacts [monitoring and instant messaging]. Contacts is a tab that can be toggled to display Call Logs, Abandoned Calls, Voicemails and Agent Activity.

File Messaging Tools Help

ACD State

Call Control Buttons

Personal Wallboard

Company Logo KAKAPO SYSTEMS

My Statistics						Overall Queue Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Holiday Cruises	5	0	5	00:00:00	00:00:00	29	0	29	0	00:00:00	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00	3	1	2	0	00:00:00	00:01:28	00:00:02
Kakapo Support	3	0	3	00:00:00	00:00:00	7	2	5	0	00:00:00	00:00:06	00:00:28
Summary	8	0	8	00:00:00	00:00:00	39	3	36	0	00:00:00	00:00:31	00:00:10

Drop person here to begin a call

Contacts
Call Logs
Voicemail
Agent Activity

Busy Lamp Field/Contacts Tab

Active Call Window

My status: Available: Out Of Office

Search contacts

Abin Joseph	Call Logger Test			Aliza Hassan	Sign-Out
Amanda Dawson	Accounts	Sign-In		Anandu Prasad	
Arjun Harikumar		Sign-In		Athul PS	Sign-In
Benedict Hutton		Wrap-Up		Bifin Jose	Sign-In
Charles Berry	Development	Available		Dale Cassidy	Sales
Free Extension				Jenson Franklin	Support
Jevan Howe	Human Resources	Sign-In		Joseph Jacob	
Kendrick Hester	Support	Sign-Out		Larry Redman	Wrap-Up
Lucy Dickens		Sign-Out		Mabel Graves	Sign-Out
Nakul Ravindran				Nina Harrelson	

3.1 Call Notification Preferences

Unity Supervisor Web can be configured to pop a notification when a call is presented. Optionally, Supervisor can also perform auto-answer when using click-to-dial to make outbound calls, in which case the “initialization” call will be auto-answered on the primary device of the user. If this is not selected then the phone will ring and the user will have to lift the handset to initiate the outbound call.


The screenshot shows the 'Settings' window in the Unity Supervisor Web interface. The left sidebar contains a search bar and a list of settings categories: 'Unity Settings' (expanded), 'Appearance', 'Contact Search', 'Computer/Phone Integration' (expanded), 'Dialing Rule', 'Outlook Integration', 'Browser Integration', 'Call Notification' (highlighted with a red box), 'Language', 'Connection' (expanded), 'Network', 'Authentication', and 'Call Centers'. The main content area is titled 'Specify how to be notified of incoming or outgoing calls.' and contains the following options:

- ☒ Show remote party phone number
- On an incoming or outgoing call
 - ☐ Override the contact name using the number
 - ☐ perform auto answer when using click-to-dial
 - ☒ pop summary notification for seconds

At the bottom right of the window are 'Cancel' and 'Save' buttons.

3.2 Show Remote Party Phone Number

This setting will configure to show the remote party number [if available], as shown below. This applies to both internal and external parties.

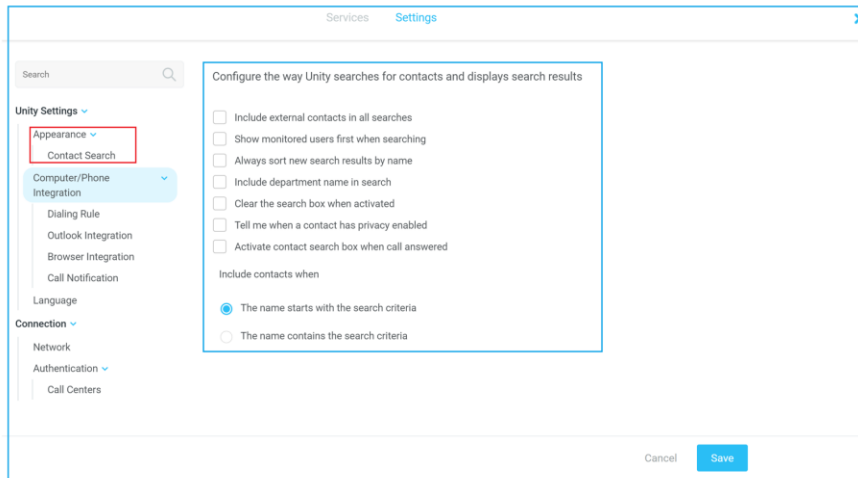
From	To	Duration	Status
 Chris Tutt	07900575	00:09	Active/Not recording

3.3 Override Contact Name Using Number

Unity can also perform a contact search based on the remote party number even if the name was provided by the Broadworks platform, this is especially useful when the name delivered through the PSTN is incorrect, for example in some cases this may always be “WIRELESS CALLER”.

3.4 Appearance

In Settings [button] > Settings [tab] > Appearance, the user can configure the way Unity searches for contacts and displays search results.



4 MAIN INTERFACE ELEMENTS

4.1 ACD State Buttons

If the Supervisor also has a Call Center Agent Standard/Premium license assigned then ACD State buttons can be used to set availability for all call centers. When clicking “Unavailable” the user may be presented a list of unavailable reason codes if configured in BroadWorks.

4.2 Call Control

Call Control buttons provide quick access to common telephone handling commands. Only services that are assigned to the user are displayed. For example, if Call Recording and Voicemail are not assigned then these buttons will not be displayed.

4.3 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. This is from the moment the call was first placed and does not reset when a call is Held or Retrieved. Unity will mirror any call handling made on the user’s IP phone. For example, if the call is placed on Hold on the handset, the user will show as being on Hold in the Active Call Window.

4.4 Contacts

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

4.5 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 inbound DID calls, ACD and Hunt Group calls. The Basic Call Log service will provide the last 20 numbers of each type that are loaded on Unity startup, however calls will automatically be added to these lists as Unity is running. Please note, Unity web clients do not support the Enhanced Call Logs user service.

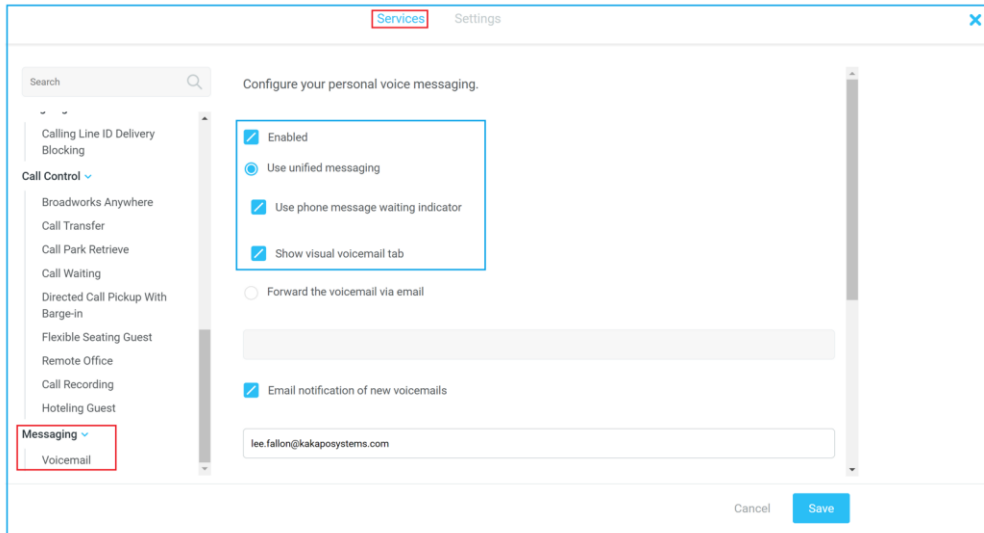
4.6 Voicemail

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 through the browser's default media player. Right click to play, save locally, or delete.

My Statistics						Overall Queue Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Holiday Cruises	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00
Kakapo Support	1	0	1	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00
Summary	1	0	1	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00

Name	Phone number	Duration	Call Date
Unavailable	+6477 7777 7777	00:00:02	04/25/2022 10:14:57 AM
Unavailable	+6477 7777 7777	00:00:05	04/21/2022 11:14:48 AM

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



4.7 Personal Wallboard

The Personal Wallboard will show current performance metrics for the call centers the user is assigned to, either as a supervisor and/or an agent. The statistics are broken down by “My Statistics” which shows the Supervisor’s individual performance [assuming the supervisor is also an agent of the call center] and “Overall Queue Statistics” which will show the current conditions across the entire call center[s]. The ▲ icon at the upper right hand corner of Personal Wallboard toggles between showing all call centers individually [Maximized View] or a summary of all call centers combined [Minimized View].

Maximized View

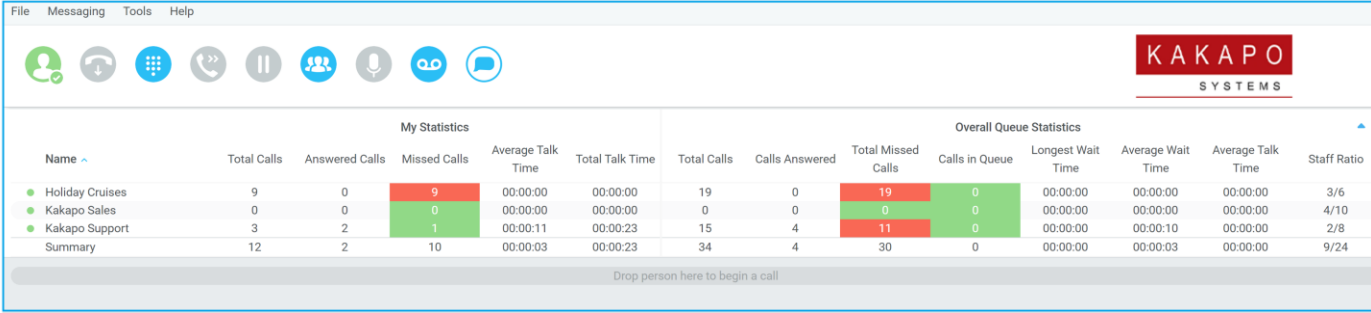
My Statistics						Overall Queue Statistics ▲						
Name ^	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
● Holiday Cruises	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00
● Kakapo Sales	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00
● Kakapo Support	0	0	0	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00
Summary	0	0	0	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00

Minimized View

My Statistics						Overall Queue Statistics ▼						
Name ^	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Summary	0	0	0	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00

Note: Statistics shown in Personal Wallboard are always from midnight on the current day

When showing in maximized view, each queue in the list will include an icon to indicate the joined state of the logged-in user to that queue. This will be green if joined, red if unjoined, or grey if the user is not an agent of that queue [so therefore unable to join]. If the user isn't an agent for the queue there will be no statistics in the “My Statistics” section of the Personal Wallboard.

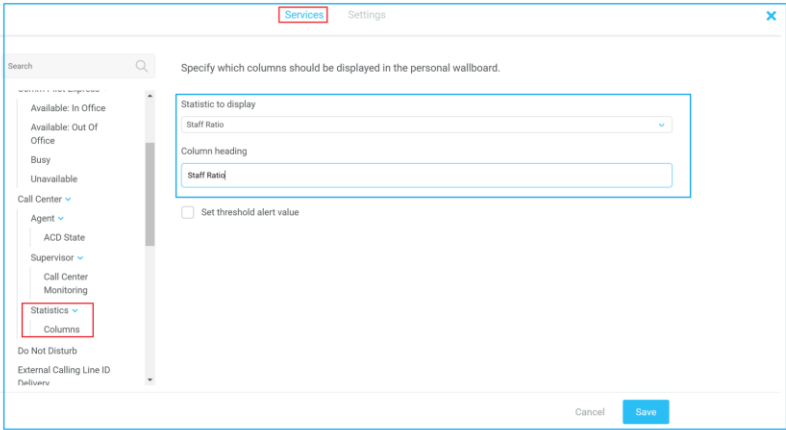


My Statistics						Overall Queue Statistics							
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staff Ratio
Holiday Cruises	9	0	9	00:00:00	00:00:00	19	0	19	0	00:00:00	00:00:00	00:00:00	3/6
Kakapo Sales	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	4/10
Kakapo Support	3	2	1	00:00:11	00:00:23	15	4	11	0	00:00:00	00:00:10	00:00:00	2/8
Summary	12	2	10	00:00:03	00:00:23	34	4	30	0	00:00:00	00:00:03	00:00:00	9/24

Drop person here to begin a call

4.8 Staffed Ratio

Personal Wallboard in Unity Supervisor includes “Staffed Ratio”, an additional statistic that is not available in Unity Agent. For each queue, Staffed Ratio shows the total number of Agents that are joined to the queue out of those assigned to the queue. This can be configured in Unity Settings, as shown below.



Services Settings

Specify which columns should be displayed in the personal wallboard.

Search

Available: In Office
Available: Out Of Office
Busy
Unavailable

Call Center
Agent
ACD State
Supervisor
Call Center Monitoring

Statistics
Columns

Do Not Disturb
External Calling Line ID
Followup

Statistic to display
Staff Ratio

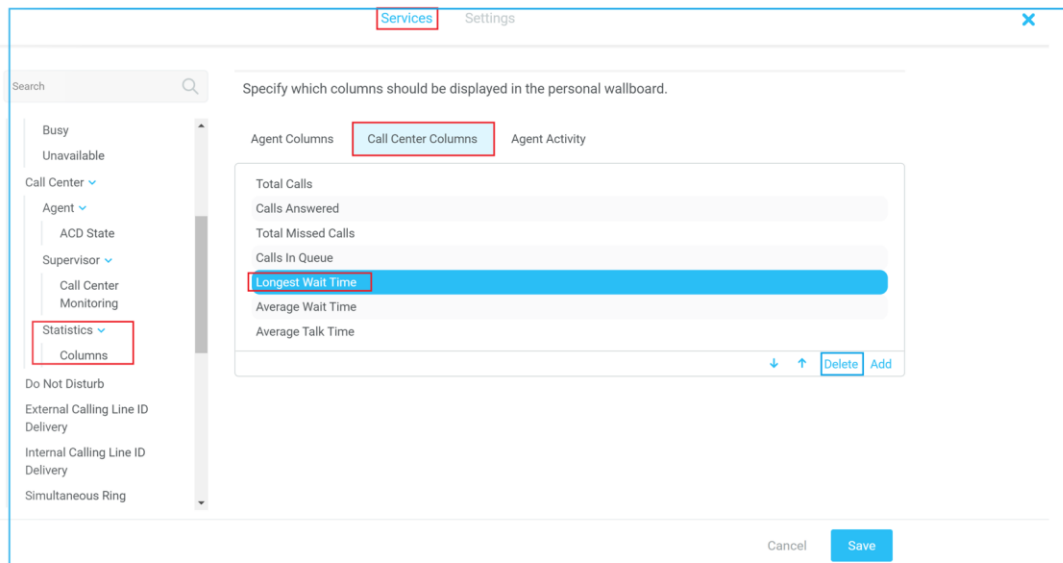
Column heading
Staff Ratio

☐ Set threshold alert value

Cancel Save

4.10 Longest Wait Statistic

By default, Unity Supervisor displays the “Longest Wait Time” statistic. This shows the wait time of the longest waiting call in the queue. If there are no calls in the queue this will be zero. This stat can optionally be removed in Settings > Services > Columns > Call Center Columns. Click the statistics you want to remove then click the minus sign to remove it.



5 CALL CENTER AGENT FUNCTIONALITY

Unity Supervisor also allows the user to perform call center agent functionality such as changing ACD state, joining and leaving a queue and taking calls for that queue. This functionality is dependent on either the Call Center Agent Standard or Call Center Agent Premium service being assigned to the user, in which case the below functionality will automatically become available.

5.1 Changing ACD State

Clicking Unavailable, Available or Wrap-Up will change overall availability for all queues you are a member of. This will not impact receiving inbound direct [non ACD] calls. The currently selected state will be highlighted as shown below.



5.1.1 Only Show One ACD Button

Unity Supervisor can optionally be configured in Settings > Services > Call Center > Agent > ACD State to only display one ACD button, which will be the currently selected state. Left clicking will provide the other ACD options.

Agent ▾
ACD State
Statistics ▾
Columns
Do Not Disturb
External Calling Line ID
Delivery

☐ Force me to assign a disposition code
for 0 seconds
☐ Prevent me from manually changing my ACD state when on a call center call.
☒ Only show the current ACD state button
☐ Activate sign-out ACD state when Unity is closing.

File Messaging Tools Help

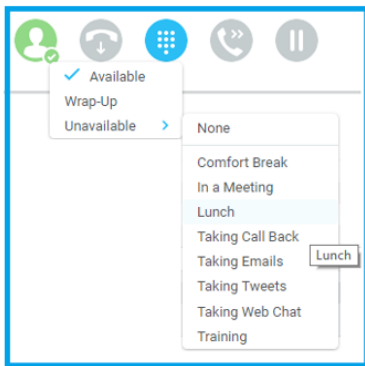
Available
Wrap-Up
Unavailable >

My Statistics

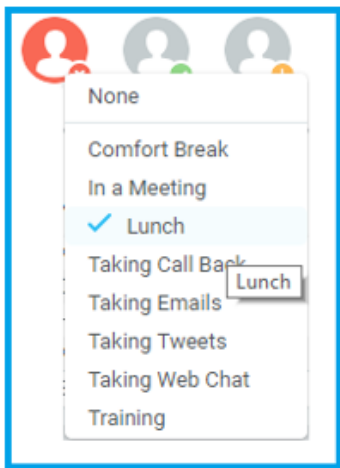
Name ^	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time
Holiday Cruises	9	0	9	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00
Kakapo Support	3	0	3	00:00:00	00:00:00
Summary	12	0	12	00:00:00	00:00:00

5.1.2 Assigning Unavailable Codes

When the supervisor selects unavailable, any unavailable codes that have been configured in BroadWorks will appear.

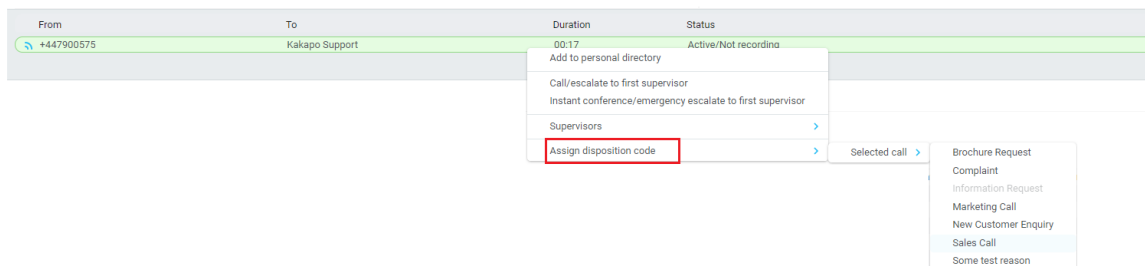


Unavailable Code assignment with three ACD buttons.

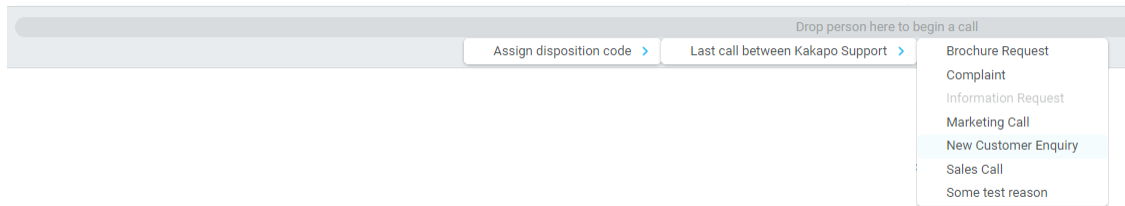


5.1.3 Disposition Codes

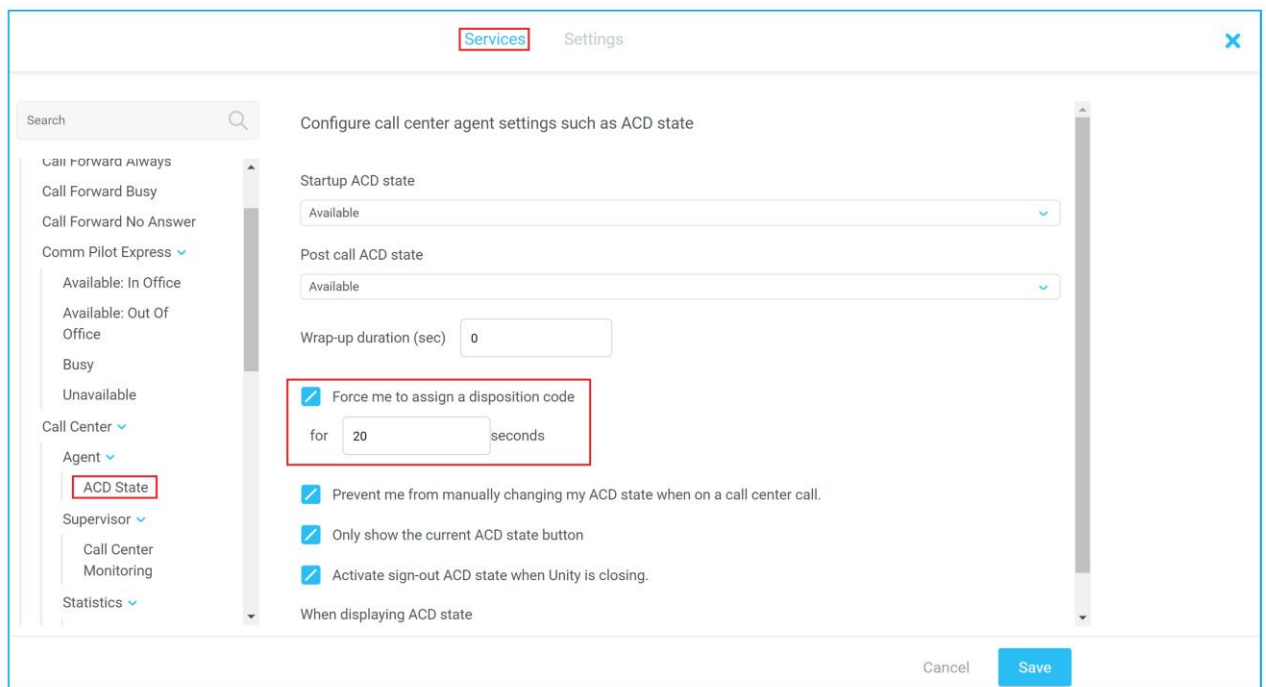
To assign a Disposition Code the supervisor can right click the active ACD call in the Active Call Window and assign a code through the context menu. Previously assigned codes cannot be assigned to the same call again.



A disposition code can also be assigned to the last ACD call through the context menu, as shown below



When Unity is configured to force the agent to assign a disposition code through a popup window which is automatically displayed to the user when the call is released, assuming a code wasn't assigned while the call was in progress. A timer must be specified which will display a count-down to the user, and will automatically close [and change the ACD state to Available] once the timer duration has elapsed. This feature is activated in Settings as below.



Example of a user being forced to assign a disposition code after the call ends.

File
Messaging
Tools
Help

My Statistics

Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time
Holiday Cruises	5	0	5	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00
Kakapo Support	6	0	4	00:00:00	00:00:00
Summary	11	0	9	00:00:00	00:00:00

Overall Queue Statistics

Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staff Ratio
35	0	35	0	00:00:00	00:00:00	00:00:00	3/6
3	1	2	0	00:00:00	00:01:28	00:00:00	4/10
10	3	8	0	00:00:00	00:00:06	00:00:00	5/8
45	0	45	0	00:00:00	00:00:31	00:00:00	12/24

Assign disposition code - 00:12 remaining

Code

Select a disposition code

Brochure Request
Complaint
Information Request
Marketing Call
New Customer Enquiry
Sales Call

Contacts

Call Logs 2 Voicemail Agent Activity

Search contacts

Abin Joseph

Call Logger Test

Amanda Dawson

Accounts

Sign-In

Arjun Harikumar

Sign-In

Benedict Hutton

Wrap-Up

Charles Berry

Development

Available

Free Extension

Jevan Howe

Human Resources

Sign-In

Joseph Jacob

My status: Available: In Office

Sign-Out

Sign-In

Sign-In

Sales

Support

Sign-Out

5.2 Using Personal Wallboard

As previously mentioned, the Personal Wallboard will show agent-level statistics for any call centers that the user is associated to as an agent, as well as the joined state for that queue. However if the user is a supervisor only the agent-level statistics will be blank and the joined icon will be grey.

My Statistics							Overall Queue Statistics							
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Staffed	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Calls Transferred
Development Queue	0	0	0	00:00:00	00:00:00	00:00:00	37	0	37	0	00:00:00	00:00:00	00:00:00	0
Holiday Cruises	0	0	0	00:00:00	00:00:00	00:00:00	22	0	22	0	00:00:00	00:00:00	00:00:00	0
Kakapo Sales	0	0	0	00:00:00	00:00:00	02:19:49	0	0	0	0	00:00:00	00:00:00	00:00:00	0
Kakapo Support	4	1	3	00:00:26	00:00:26	02:19:49	4	1	3	0	00:00:00	00:00:05	00:00:00	3
Summary	4	1	3	00:00:06	00:00:26	04:39:37	63	1	62	0	00:00:00	00:00:01	00:00:00	3

If the user is an agent they can right-click a call center in the Personal Wallboard to perform common agent actions such as join/leave, instant message supervisors etc.

My Statistics

Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time
Development Queue	0	0	0	00:00:00	00:00:00
Holiday Cruises	0	0	0	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00
Kakapo Support	4	1	3	00:00:26	00:00:26
Summary			3	00:00:06	00:00:26

Call queue

Leave queue

Show agent activity

Supervisors

Agents



Instant message all supervised agents

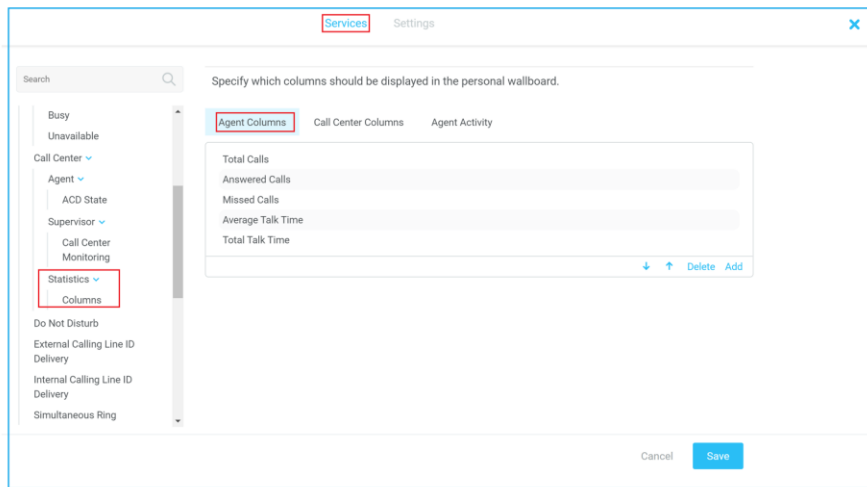
Activate forced forwarding

Remove from personal wallboard

5.2.1 Configuring Statistics Columns in Personal Wallboard

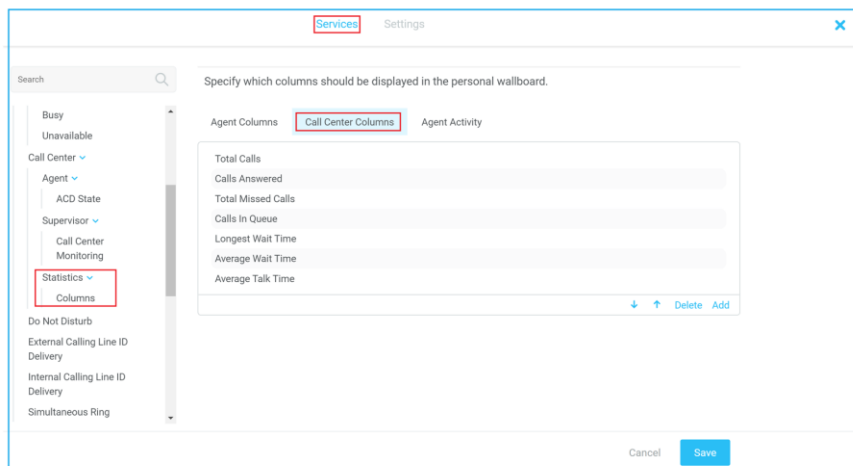
The statistics shown in “My Statistics” and “Overall Queue Statistics” panels of the Personal Wallboard are configurable in Settings > Services > Call Center > Statistics > Columns.

Statistics can be added or removed with the   buttons and the order they are displayed, from left to right in the Personal Wallboard can be changed with the arrows. Topmost is to the left.



5.2.2 Customizing Statistics Label

Double click any statistic as displayed in the list above. From the below field you are able to customize the statistic label as required.



5.2.3 Configuring Alert Thresholds in Personal Wallboard

Double click any Statistic in Settings > Services > Call center > Statistics > Columns. Select Agent Columns, Call Centre Columns or Agent Activity and double click on the column. This will display a table where corresponding values can be configured that will progressively change the statistic background colour green, yellow, red and black.

Some statistics allow a different threshold to be set per call center, for example important queues can have lower thresholds.

Search

Specify which columns should be displayed in the personal wallboard.

Statistic to display
Calls Answered

Column heading
Answered Calls

☒ Set threshold alert value

Call centers				
All	10	5	2	1
Development Queue	3	2	1	0
Holiday Cruises				
Kakapo Sales				
Kakapo Support	1	2	3	4

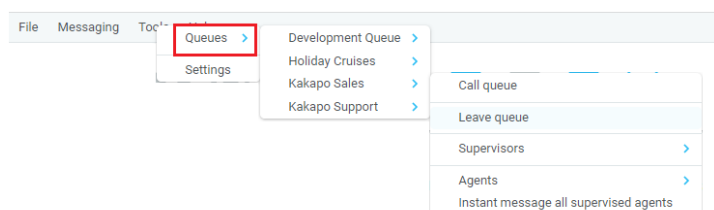
Double click an entry in the list to set overall threshold values or those for a specific call center.

In the example below statistics columns have been added, some have been renamed from the default and threshold alerts have been configured.

My Statistics					
Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Staffed Time
2	2	0	00:00:30	00:01:00	01:02:10
0	0	0	00:00:00	00:00:00	00:00:00
0	0	0	00:00:00	00:00:00	00:09:47
2	2	0	00:00:08	00:00:17	00:06:18
4	4	0	00:00:09	00:01:17	01:18:14

5.3 Tools Menu

The Tools menu provides another way to perform common ACD actions, as shown below. This method should be used when the Personal Wallboard is minimized.




5.4 Receiving ACD Calls

Inbound ACD calls will display the call center name, as configured in BroadWorks, in the “To” field. The “From” field will display the incoming CallerID [if not withheld] or the name of the caller if that can be matched from the Directory. Answer the call by lifting the IP phone handset, clicking Answer/Release call control button or double clicking the call in the Active Call Window.

My Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Staffed Time
Kakapo Sales	2	2	0	00:00:30	00:01:00	01:04:10
Holiday Cruises	0	0	0	00:00:00	00:00:00	00:00:00
Development Queue	0	0	0	00:00:00	00:00:00	00:09:47
Kakapo Support	2	2	0	00:00:08	00:00:17	00:06:31
Summary	4	4	0	00:00:09	00:01:17	01:20:26

From	To	Duration	Status
Kakapo Support (+447976493816)	Jenna Wimshurst	00:00	Ringing

Hang up the IP phone handset or click Release  to end the call.

5.5 Auto Answer

Unity Supervisor optionally allows ACD calls to auto-answer when the agent is in the “Available” state. This is toggled on/off in Settings > Incoming Calls > Call Centre > Agent. This is only available if the user is associated to the queue as an agent.

Search

Q

Configure call center agent settings such as ACD state

Busy

Unavailable

Call Center ▾

Agent ▾

Statistics ▾

Columns

Do Not Disturb

External Calling Line ID

Delivery

Calls

☒ Automatically answer call center calls when I'm available

☒ Include call center calls in my calls logs

☒ Display queued call center calls in the list

When listing supervisors:

☒ Include all supervisors in the call center

☐ Include only those supervisors that are currently supervising me

5.6 Supervisor Escalation

Unity Call Center Supervisor facilitates the BroadWorks call center escalation feature by allowing both standard and emergency call escalation. Both types of escalation can only be performed on call center calls and both inbound and outbound [DNIS] calls are supported. In either case, a user can only escalate a call to a supervisor if they are currently supervising them in BroadWorks. If this is not the case the user will be told [through the phone] that the supervisor is not a valid supervisor.

Services Settings

Search

Q

Configure call center agent settings such as ACD state

Call Forward Always

Call Forward Busy

Call Forward No Answer

Comm Pilot Express ▾

Available: In Office

Available: Out Of Office

Busy

Unavailable

Call Center ▾

Agent >

Statistics ▾

Columns

Do Not Disturb

External Calling Line ID

Delivery

Calls

☒ Automatically answer call center calls when I'm available

☒ Include call center calls in my calls logs

☐ Display queued call center calls in the list

☐ Include call priority

When listing supervisors:

☒ Include all supervisors in the call center

☐ Include only those supervisors that are currently supervising me

Cancel

Save

27 | Page

5.7 Standard Escalation

Standard escalation is used when an agent needs to be given information or instruction from the supervisor without conferencing in the remote party. Typically, the agent will release the call to the supervisor and relay the information to the remote party. Unity allows the call to be escalated to a specific supervisor or to the first supervisor that is available. The Agent's Unity client will automatically place the ACD call on hold, then dial the extension of the supervisor as an escalated call. This call will then appear as an escalated call in all center reports. Standard call policy/routing rules will be used when calling the supervisor, such as DND, call forwarding and hoteling guest etc. At any time, the agent can release the escalated call, or can transfer or conference both calls together if required.

5.7.1 Emergency Escalation

Emergency escalation is used to immediately conference a supervisor into the call with the remote party, therefore it relies on either the 3-Way or N-Way Calling user service being assigned. When performing an emergency escalation, Unity will place any active calls on hold then dial the selected supervisor, or the first supervisor that is available.

5.7.2 Escalation via Active Call Window

To perform escalation, the agent right-clicks the call in the active call window, then either chooses the supervisor to escalate the call to or escalates the call to the first available supervisor.

The screenshot displays the Unity client interface. At the top, there are two tables: 'My Statistics' and 'Overall Queue Statistics'. Below these, a call log shows a call from 'Lee Fallon (Mobile)' to 'Kakapo Support'. A right-click context menu is open over this call, showing options: 'Add to personal directory', 'Call/escalate to first supervisor', 'Instant conference/emergency escalate to first supervisor', 'Supervisors', and 'Assign disposition code'. The 'Supervisors' option is highlighted with a red box. Below the call log, there is a table of call history with columns for Name, Duration, and Call Date.

My Statistics						Overall Queue Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Holiday Cruises	0	0	0	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00
Kakapo Support	2	1	0	00:00:07	00:00:07	2	2	0	0	00:00:00	00:00:07	00:00:00
Summary	2	1	0	00:00:02	00:00:07	3	2	1	0	00:00:00	00:00:02	00:00:00

From	To	Duration	Status
Lee Fallon (Mobile)	Kakapo Support	00:00	Active/Not recorded

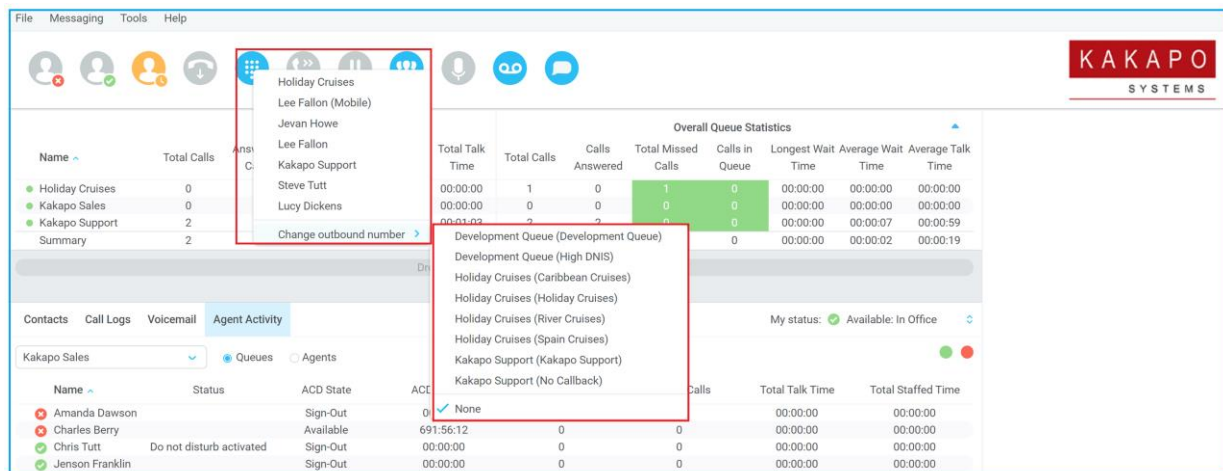
Name	Duration	Call Date
Holiday Cruises	0002	05/03/2022 09:48:15 AM
Lee Fallon (Mobile)	07542901160	04/29/2022 03:59:44 PM
Lee Fallon (Mobile)	07542901160	04/29/2022 03:41:46 PM
Lee Fallon (Mobile)	07542901160	04/29/2022 03:27:32 PM
Lee Fallon (Mobile)	07542901160	04/29/2022 12:57:52 PM
Jevan Howe	0012	04/29/2022 12:43:05 PM

Please note that if the supervisor right-clicks on a different call center in the personal wallboard [to the one that the call was routed through] then the call escalation options will not be displayed.

5.8 Activating Outbound DNIS

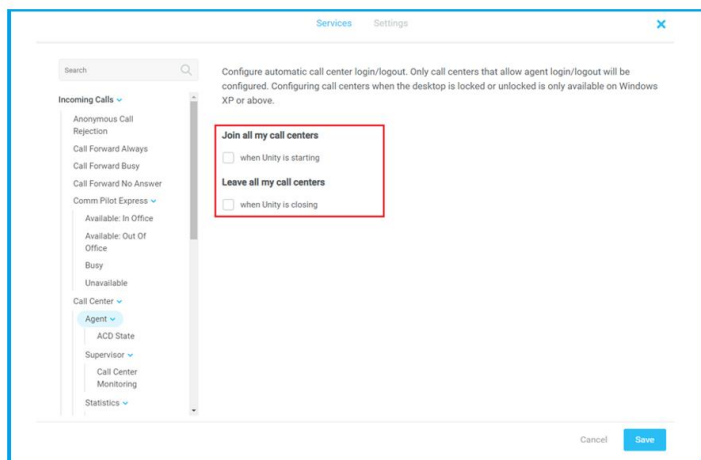
If the supervisor is an agent of BroadWorks call center premium queues, and the outbound DNIS capability has been configured, then the user can select an outbound DNIS which will determine which outbound CallerID is presented when the supervisor makes outbound calls.

Right click the Dial icon and mouse over “Change Outbound Number” at the bottom [the numbers above are a clickable list of last 10 numbers for redial]. The outbound DNIS that are available are presented. The currently selected outbound DNIS is ticked. This will affect all outbound calls until the outbound DNIS setting is changed, or set to none.

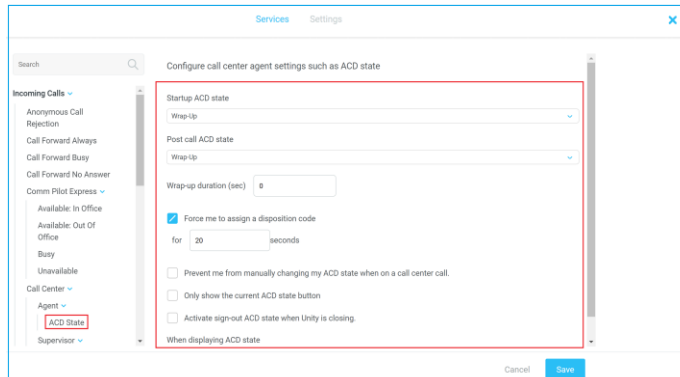


5.9 Pre-configuration of Joined and ACD State

Unity can be configured to automatically join or leave the agent to all ACD queues when starting or closing. This is in Settings > Services > Incoming Calls > Agent.



In addition, the ACD state can be configured for Unity startup and when an ACD call is released, as shown below



6 SUPERVISOR FUNCTIONALITY

6.1 Changing Agent Availability from Personal Wallboard

Right clicking any queue in the Personal Wallboard will present a drop list of options. Hover over “Agents” to see a list of all agents assigned to the selected queue. Hovering over the agent in turn will present the supervisor options to Join/Leave the agent from the queue and change their ACD State.

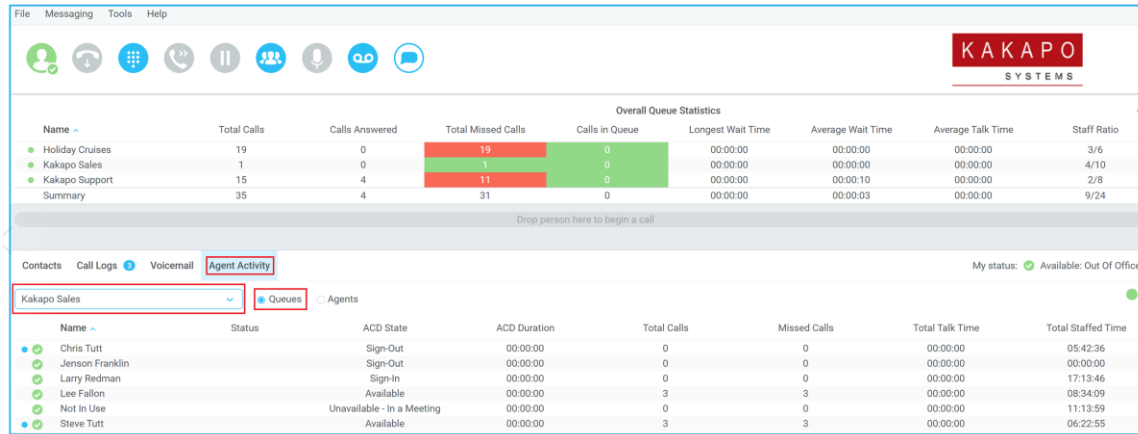
My Statistics							Overall Queue Statistics									
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Staffed	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Calls Transferred		
Development Queue	0	0	0	00:00:00	00:00:00	00:00:00	37	0	37	0	00:00:00	00:00:00	00:00:00	0		
Holiday Cruises	0	0	0	00:00:00	00:00:00	00:00:00	22	0	22	0	00:00:00	00:00:00	00:00:00	0		
Kakapo Sales	0	0	0	00:00:00	00:00:00	03:00:37	0	0	0	0	00:00:00	00:00:00	00:00:00	0		
Kakapo Support	4	1	3	00:00:26	00:00:26	03:00:38	4	1	3	0	00:00:09	00:00:09	00:00:00	9		
Summary	Call queue			00:00:06	00:00:26	06:01:13	63	1	62	0	00:00:00	00:00:01	00:00:00	9		
<div> <div> <div>Leave queue</div> <div>Show agent activity</div> <div>Supervisors</div> <div>Agents</div> <div>Instant message all supervised agents</div> <div>Activate forced forwarding</div> <div>Remove from personal wallboard</div> </div> <div> <div>Athul PS</div> <div>Charles Berry</div> <div>Chris Tutt</div> <div>Gopikrishnan V</div> <div>Lee Fallon</div> <div>Lucy Dickens</div> <div>Steve Tutt</div> <div>Steve Wardle</div> </div> <div> <div>Leave queue</div> <div>Sign-in</div> <div>Available</div> <div>Unavailable</div> <div>Wrap-Up</div> <div>Sign-Out</div> <div>Silent monitor</div> <div>Call extension</div> <div>Instant message</div> </div> <div> <div>Comfort Break</div> <div>In a Meeting</div> <div>KMPIQ Call-back</div> <div>Lunch</div> <div>QIC'S</div> <div>Replying to Call Back</div> <div>Replying to Email</div> <div>Replying to SMS</div> <div>Replying to Tweet</div> <div>Replying to Web Chat</div> </div> </div>																

6.2 Agent Activity Tab

The Agent Activity tab are where the Supervisor will spend much of their time as it provides agent-level statistics and functionalities. There are two ways of displaying the agent activity list; by individual queue or

individual agent. Please note that in both cases there is no limit to the number of agents or queues that will be displayed in the list.

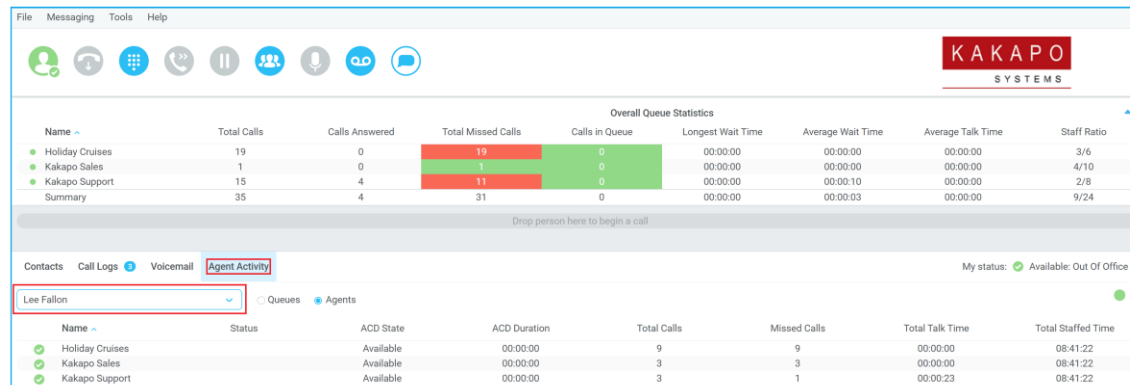
Agent Activity by queue – Select a queue from the drop-down to list all supervised agents in that queue



Overall Queue Statistics								
Name	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staff Ratio
Holiday Cruises	19	0	19	0	00:00:00	00:00:00	00:00:00	3/6
Kakapo Sales	1	0	1	0	00:00:00	00:00:00	00:00:00	4/10
Kakapo Support	15	4	11	0	00:00:00	00:00:10	00:00:00	2/8
Summary	35	4	31	0	00:00:00	00:00:03	00:00:00	9/24

Name	Status	ACD State	ACD Duration	Total Calls	Missed Calls	Total Talk Time	Total Staffed Time
Chris Tutt	Available	Sign-Out	00:00:00	0	0	00:00:00	05:42:36
Jenson Franklin	Available	Sign-Out	00:00:00	0	0	00:00:00	00:00:00
Larry Redman	Available	Sign-In	00:00:00	0	0	00:00:00	17:13:46
Lee Fallon	Available	Available	00:00:00	3	3	00:00:00	08:34:09
Not In Use	Unavailable - In a Meeting		00:00:00	0	0	00:00:00	11:13:59
Steve Tutt	Available	Available	00:00:00	3	3	00:00:00	06:22:55

Agent Activity by Agent – Select an Agent from the drop-down to displayed all queues in which the supervisor is supervising the agent.



Overall Queue Statistics								
Name	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staff Ratio
Holiday Cruises	19	0	19	0	00:00:00	00:00:00	00:00:00	3/6
Kakapo Sales	1	0	1	0	00:00:00	00:00:00	00:00:00	4/10
Kakapo Support	15	4	11	0	00:00:00	00:00:10	00:00:00	2/8
Summary	35	4	31	0	00:00:00	00:00:03	00:00:00	9/24

Name	Status	ACD State	ACD Duration	Total Calls	Missed Calls	Total Talk Time	Total Staffed Time
Holiday Cruises	Available	Available	00:00:00	9	9	00:00:00	08:41:22
Kakapo Sales	Available	Available	00:00:00	3	3	00:00:00	08:41:22
Kakapo Support	Available	Available	00:00:00	3	1	00:00:23	08:41:22

6.2.1 Changing Agent ACD State

The supervisor can change the agent's availability in the call center either from the Personal Wallboard, Tools menu or Agent Activity tab. The actions that are available are forcing the agent to Join or Leave specific queues and changing their ACD state, including the unavailable reason code if applicable. Calling or Instant Messaging the Agent is also available from the context menu.

When providing the option to change a monitored agent's ACD state or joined status, Unity will show if the agent is currently joined to the queue and what the current ACD state is, as shown below.

Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Holiday Cruises	0	0	0	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00
Kakapo Support	2	2	0	00:00:31	00:01:03	2	2	0	0	00:00:00	00:00:07	00:00:00
Summary	2	2	0	00:00:10	00:01:03	3	2	1	0	00:00:00	00:00:02	00:00:00

Drop person here to begin a call

Contacts	Call Logs	Voicemail	Agent Activity
Kakapo Sales			
Name	Right Click	Status	
Amanda Dawson	Join queue	Available	
Charles Berry	Sign-In	Unavailable	
Chris Tutt	Sign-In	Available	
Jenson Franklin	Sign-In	Unavailable	
Larry Redman	Sign-In	Available	
Lee Fallon	Sign-In	Unavailable	
Not In Use	Sign-In	Available	
Sabin Joseph	Sign-In	Unavailable	
Steve Tutt	Sign-In	Available	
Steve Wardle	Sign-In	Unavailable	
Summary			

6.2.2 Remotely Changing Agent Availability from Agent Activity Tab

Right click the agent or queue from the Agent Activity list to join/leave the agent to/from each queue or to change their ACD state for all queues that the agent is a member of.

Contacts

Call Logs

Voicemail

Agent Activity

My status: Available: In Office

Holiday Cruises

Queues

Agents

Name	Status	Unavailable?	ACD State	ACD Duration	Total Calls	Missed Calls	Total Talk Time	Total Staffed Time
Steve Tutt	Available		Available	00:00:00	22	22	00:00:00	11:31:07
Steve Wardle	ACD state is Sign-In	Sign-In	00:00:00	0	0	00:00:00	00:00:00	
Sabin Joseph	ACD state is Sign-Out	Sign-Out	00:00:00	0	0	00:00:00	00:00:00	
Shah Castro	ACD state is Sign-Out	Sign-Out	00:00:00	0	0	00:00:00	00:00:00	
Not In Use	ACD state is Unavail...	Unavailable - In a M...	00:00:00	0	0	00:00:00	11:30:19	
Lee Fallon	Not joined	Available	00:00:00	0	0	00:00:00	00:07:32	
Join queue								
Sign-In								
Available								
Unavailable								
Wrap-Up								
Sign-Out								
Silent monitor								
Call extension								
Instant message								
Comfort Break								
In a Meeting								
KMPIQ Call-back								
Lunch								
QIC'S								
Replying to Call Back								
Replying to Email								
Replying to SMS								
Replying to Tweet								
Replying to Web Chat								
Training								
Summary								

22

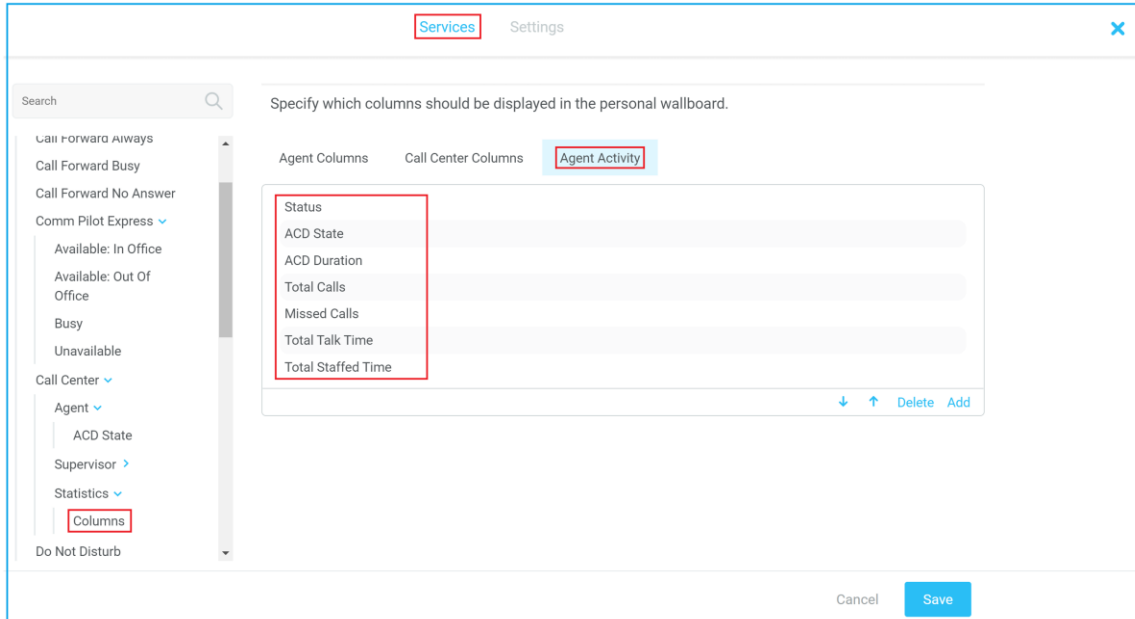
22

00:00:00

23:09:00

6.3 View Statistics and Set Thresholds Against Agents

All statistics in the Agent Activity tab are configurable and allow thresholds to be set against them. To add and remove statistics in the Agent Activity tab go to Settings>Statistics>Columns>Agent Activity. To set thresholds against a statistic, double click it and set the values.



6.3.1 Changing Agent Activity Icon

The Agent's icon in the Agent Activity tab can be based on a range of states, for example, Joined State which displays either red or green to represent whether the Agent is joined to the Call Center or not.

Contacts Call Logs Voicemail Agent Activity			
Kakapo Sales		Queues Agents	
Name	Status	ACD State	
✖ Amanda Dawson		Sign-Out	
✖ Charles Berry		Available	
✔ Chris Tutt	Do not disturb activated	Sign-Out	
✔ Jenson Franklin		Sign-Out	
✔ Larry Redman		Wrap-Up	
✔ Lee Fallon	Available In Office profile activ...	Available	
✔ Not In Use		Sign-Out	
✔ Sebin Joseph		Available	
✔ Steve Tutt		Sign-Out	
✔ Steve Wardle		Sign-Out	

This is configured in Settings>Supervisor>Agent activity image based on, as shown below.

Search

Configure call center agent settings such as ACD state

General calls

☐ Only include joined agents in the agent activity list

Agent activity image based on

Joined state

Joined state

ACD state

Hook state

ACD & hook state

Available to take calls

Available: In Office

Available: Out Of Office

Busy

Unavailable

Call Center

Agent

ACD State

Supervisor

Statistics

Columns

Do Not Disturb

External Calling Line ID Delivery

Internal Calling Line ID Delivery

6.4 Threshold Alerts

Thresholds allow the supervisor to configure performance triggers against various parameters for all the queues they are supervising. These will not affect the call handling and construction of the queue, but are designed as a warning that the call center is experiencing abnormal behaviour and allowing the supervisor to take remedial action.

Click Settings > Services > Statistics > Columns > Call Center Columns – double click the statics (e.g. total calls) to set thresholds. Different thresholds can be set for all queue parameters for different call centers, or all call centers can have the same threshold. Double click the boxes to populate the threshold value. Tick ok to confirm.

Services Settings

Specify which columns should be displayed in the personal wallboard.

Statistic to display

Total Calls

Column heading

Total Calls

☒ Set threshold alert value

☐ Highlight non-zero values

☐ Increasing thresholds (call)

Green <=

Yellow <=

Red <=

Cancel Save

Available: In Office

Available: Out Of Office

Busy

Unavailable

Call Center

Agent

ACD State

Supervisor

Statistics

Columns

Do Not Disturb

External Calling Line ID Delivery

Internal Calling Line ID Delivery

My Statistics						Overall Queue Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Holiday Cruises	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00
Kakapo Support	3	1	2	00:00:23	00:00:23	3	1	2	0	00:00:00	00:00:03	00:00:00
Summary	3	1	2	00:00:07	00:00:23	4	1	3	0	00:00:00	00:00:01	00:00:00

6.5 Silent Monitoring

Allows the supervisor to silently monitor the next call or calls taken by a specified agent. This feature requires the Call Center Monitoring service assigned to the Supervisor in BWKS, and is only available in premium call centers.

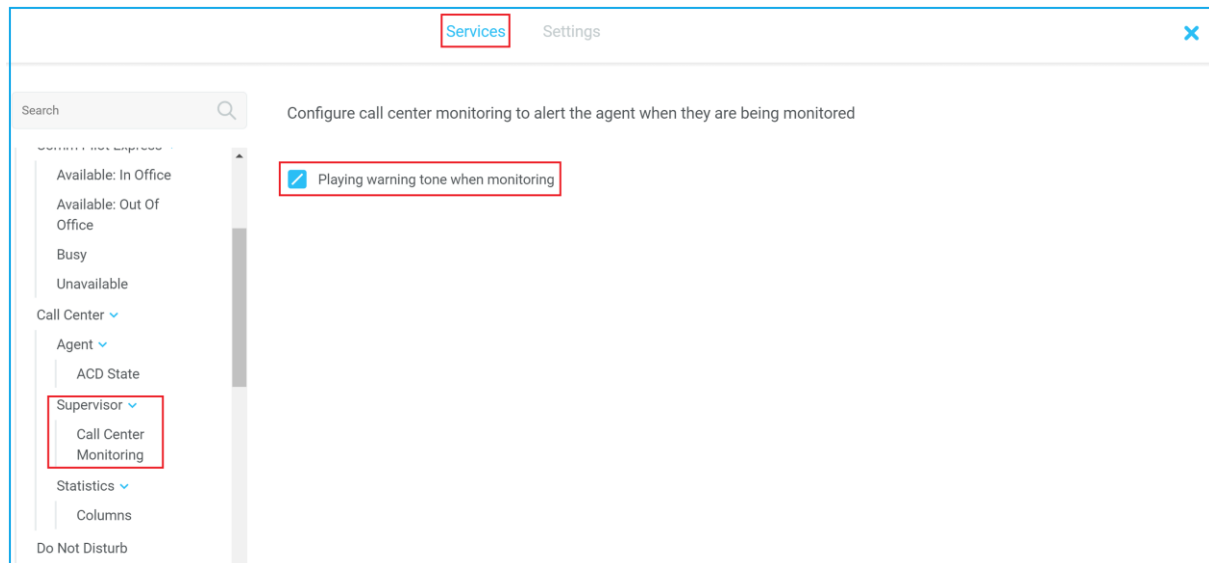
To activate Silent Monitoring, right-click an agent and select one of the Silent Monitor options from the context menu, as shown below. Silent monitor can also be initiated from the Tools menu or Personal Wallboard.

The screenshot shows the 'Agent Activity' tab in a software interface. At the top, there's a status bar indicating 'My status: Available: In Office'. Below this, a dropdown menu is set to 'Holiday Cruises'. The main table lists agents with columns for Name, Status, ACD State, ACD Duration, Total Calls, Missed Calls, Total Talk Time, and Total Staffed Time. The agents listed are Steve Tutt, Steve Wardle, Shah Castro, Sabin Joseph, Not in Use, and Lee Fallon. Lee Fallon is highlighted in blue and has a context menu open. The menu options are: Join queue, Sign-In, Available (checked), Unavailable, Wrap-Up, Sign-Out, Silent monitor (highlighted with a red box), Call extension, and Instant message. The 'Silent monitor' option has a sub-menu with 'Current call (No active call)', 'Next call only', and 'All calls'. At the bottom, a summary row shows totals for the group.

Name	Status	ACD State	ACD Duration	Total Calls	Missed Calls	Total Talk Time	Total Staffed Time
Steve Tutt	Available	Available	00:00:00	22	22	00:00:00	12:11:39
Steve Wardle	Sign-In	Sign-In	00:00:00	0	0	00:00:00	00:00:00
Shah Castro	Sign-Out	Sign-Out	00:00:00	0	0	00:00:00	00:00:00
Sabin Joseph	Sign-Out	Sign-Out	00:00:00	0	0	00:00:00	00:00:00
Not in Use	Unavailable - In a Meeting	Unavailable - In a Meeting	00:00:00	0	0	00:00:00	12:05:29
Lee Fallon	Available	Available	00:00:00	0	0	00:00:00	00:05:46
Summary				22	22	00:00:00	24:26:54

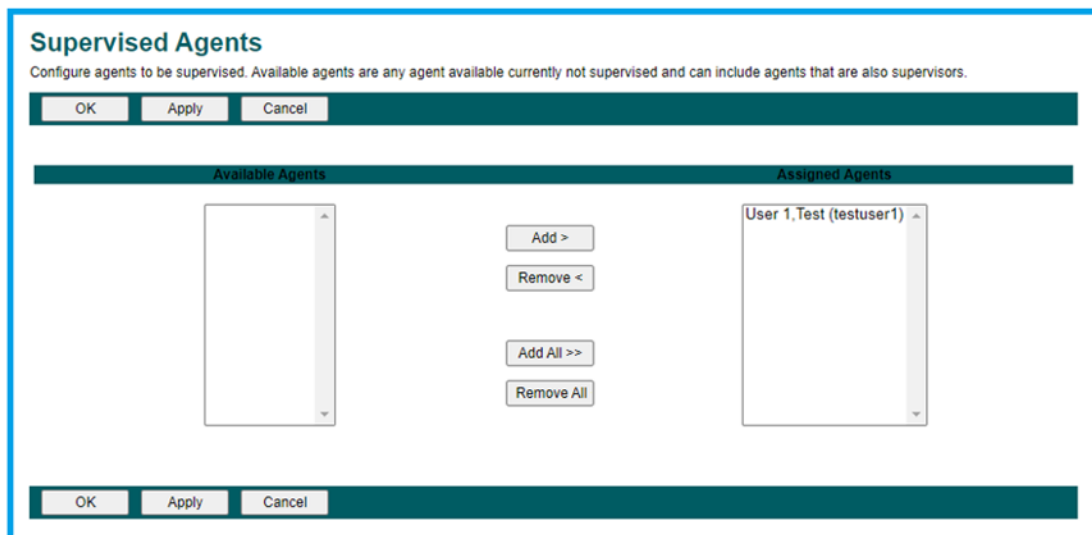
6.5.1 Silent Monitoring Warning Tone

The supervisor can optionally play the a warning tone to the agent when silent monitoring. This is configured in Settings > Services > Supervisor > Call Center Monitoring

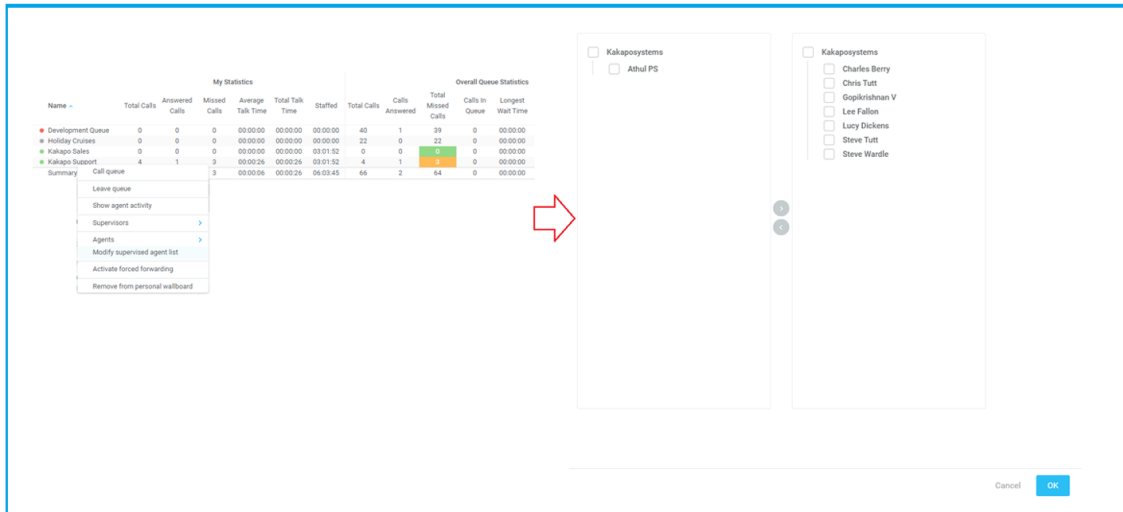


6.6 Adding Agents to Monitored Agents List

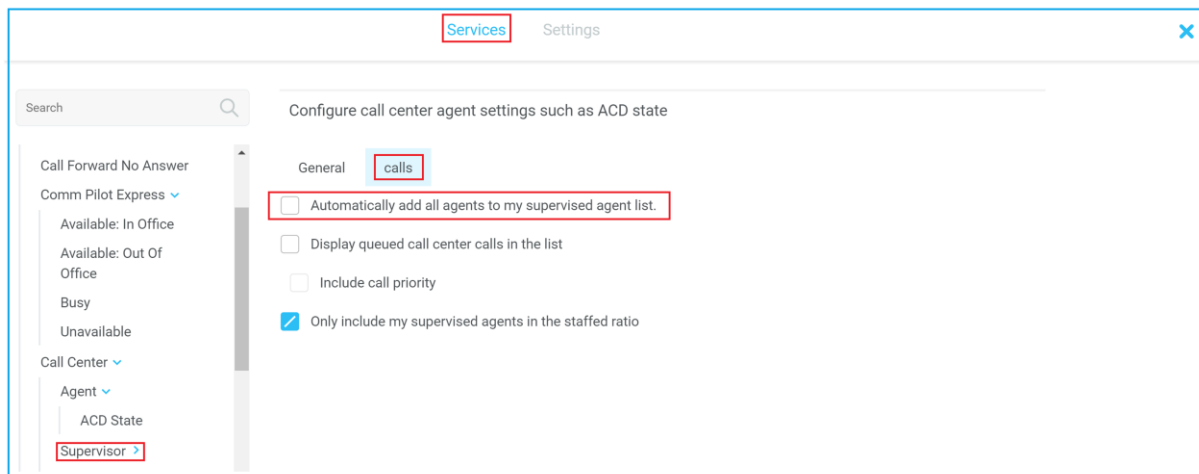
By default, Unity Supervisor will use of the list of supervised agents from BWKS, as defined in the Supervisor section in the user profile.



This list can be modified through the Personal Wallboard as shown below. It can also be modified through the Tools menu.

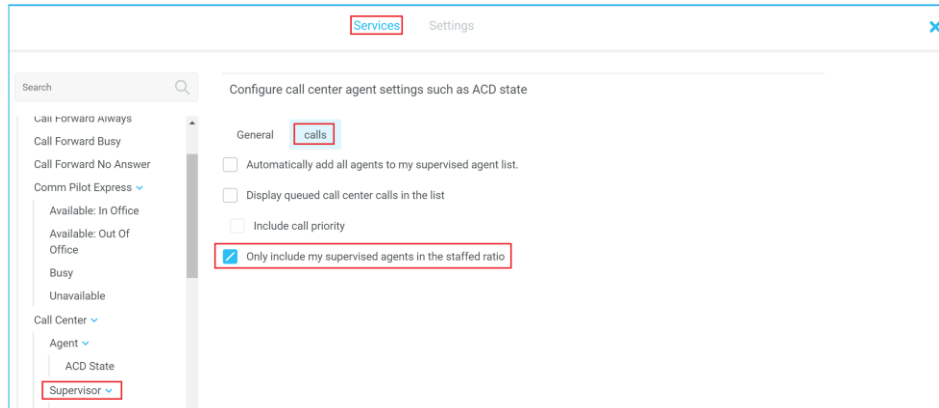


Unity can be configured to automatically add all agents to the supervised agent list, as shown below. Every time Unity Supervisor starts it will automatically add any unsupervised agents to this list, in which case the above context menu option will not be displayed.



6.7 Supervised Agents in Staffed Ratio Statistic

The supervisor can optionally configure the “Staffed Ratio” statistic so that it only shows agents that are being supervised. In Settings > Services > Supervisor – check “Only included my supervised agents in the staffed ratio”. This means that even if there are hundreds of other agents available in the queue, the ratio will be based only on those agent that the supervisor is supervising per queue.



6.8 Bulk Changing Join/Leave

The Unity Supervisor Web App provides you with the ability to join/leave all supervised agents for each call center, by clicking one of the buttons shown below. A prompt will be displayed asking the user to confirm the action. If a queue is selected in the drop-down then all supervised agents in that queue will join or leave that queue. If an agent is selected then they will join or leave all queues in the list.

Hover over the red or green dot in Agent Activity. This can be done by agent or all agents in a specific queue.

Agent Activity								My status: Available: In Office	
Holiday Cruises		Queues		Agents		Force these agents to join the call center			
Name	Status	ACD State	ACD Duration	Total Calls	Missed Calls	Total Talk Time	Total Staffed Time		
Steve Tutt	Available	Available	00:00:00	22	22	00:00:00	12:24:07		
Steve Wardle	Sign-In	Sign-In	00:00:00	0	0	00:00:00	00:00:00		
Shah Castro	Sign-Out	Sign-Out	00:00:00	0	0	00:00:00	00:00:00		
Sebin Joseph	Sign-Out	Sign-Out	00:00:00	0	0	00:00:00	00:00:00		
Not in Use	Unavailable - in a Meeting	Unavailable - in a Meeting	00:00:00	0	0	00:00:00	12:18:57		
Lee Fallon	Available	Available	00:00:00	0	0	00:00:00	00:08:46		
Summary				22	22	00:00:00	24:51:50		

Are you sure you want to join all agents to this queue?

Yes

No

6.9 IM All Users in the Call Center

To message all agents in the call center, right click on the call center in the Personal Wallboard. This creates a group chat so any replies from agents will be shared with everyone in the conversation.

My Statistics						
Name ^	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Staffed
Development Queue	0	0	0	00:00:00	00:00:00	00:00:00
Holiday Cruises	0	0	0	00:00:00	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00	03:47:20
Kakapo Support	0	0	3	00:00:26	00:00:26	03:47:20
Summary			3	00:00:06	00:00:26	07:34:39

Call queue

Leave queue

Show agent activity

Supervisors >

Agents >

Instant message all supervised agents

Modify supervised agent list

Activate forced forwarding

Remove from personal wallboard

6.10 Re-order calls in the queue and promote calls in the queue

Unity Supervisor Web provides the Supervisor with the ability to promote queued calls, as shown below. Unity will change the priority to “Highest” if not already, and will also change the queue position to 1.

Overall Queue Statistics					
Name ^	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time
Holiday Cruises	20	0	20	0	00:00:00
Kakapo Sales	2	0	1	1	00:01:59
Kakapo Support	16	4	12	0	00:00:00
Summary	38	4	33	1	00:01:59

From	To	Duration	Status
Lee Fallon (Mobile)	Kakapo Sales	01:58	Queued at position 1 - previously abandoned

Answer call

Promote call

Transfer >

Show agent activity

Unity Supervisor will indicate if a queued call has been previously abandoned since Unity has been running.

From	To	Duration	Status
Lee Fallon (Mobile)	Kakapo Sales	00:08	Queued at position 1 - previously abandoned

The Supervisor can answer the call, which will transfer the call out of queue and to the user’s extension, or to a supervised agent. This will be counted as a transferred call in BroadWorks reports.

Overall Queue Statistics					
Name ^	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time
<div><div></div> Holiday Cruises</div>	20	0	20	0	00:00:00
<div><div></div> Kakapo Sales</div>	2	0	1	1	00:01:59
<div><div></div> Kakapo Support</div>	16	4	12	0	00:00:00
Summary	38	4	33	1	00:01:59
From	To	Duration	Status		
<div><div></div> Lee Fallon (Mobile)</div>	Kakapo Sales	01:58	Queued at position 1 - previously abandoned		
<div>Contacts</div>	Call				
	Agent Activity				
	Show agent activity				

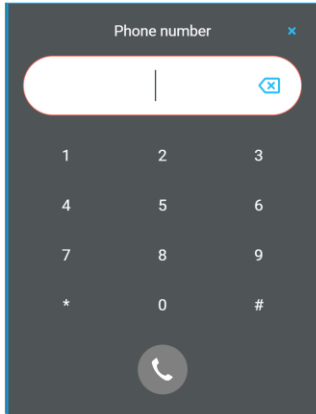
7 CALL CONTROL

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. When an inbound call is ringing Answer becomes the valid option. Once the call is active the icon will toggle to Release as hanging up is the only valid option.

7.1 Making a Call

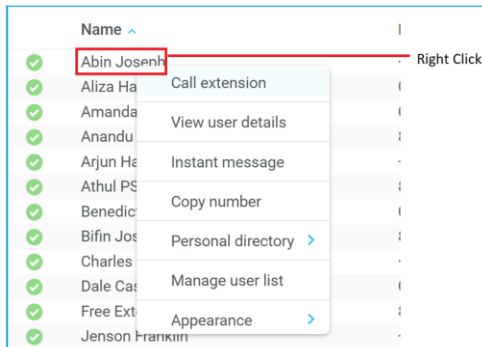
7.1.1 Using the Dial Window

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. The desk telephone will default to using hands-free speakerphone. If the telephone does not support speakerphone, you will need to lift the handset when the call is answered.



7.1.2 Using the Contacts Panel

Double click a user icon or right click and select “Call extension” (User can also left click, hold and drag to the live call window).




7.1.3 Drag and Drop

Right click a user icon on the Contacts panel and drag the icon up to the Active Call Window. This will open a call to that user. Calls can also be dragged from the Active Call Window onto a call center to perform a blind transfer. Calls dragged onto a monitored user will either be blind transferred or present options depending on the user preferences in Settings and whether the monitored user is engaged or not. For engaged contacts, park, camp-on and transfer to voicemail are available. For available contacts transfer to extension, transfer to mobile, transfer to voicemail or present call hold, camp on and transfer are available.


7.1.4 Using Directory Search

Enter the search field in the Contacts panel to dynamically search all internal users and speed dials. Either right click and select “Call extension” or right-click and drag the icon into the Active Call Window to make the call.

7.2 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. Your primary phone will now be on hands-free speakerphone, if it supports this feature with BroadWorks. If there is an active call in progress, you will need to click the new inbound call in the Current Call List before clicking Answer, this will automatically place the first call on Hold. Please note that answering a call by lifting the handset on the desk phone will have the same effect as clicking Answer in Unity.

7.3 End a Call

Click the Release button  to end the currently selected call. If there are multiple calls in the current call list, make sure you select the right call before clicking Release.

Please note: Replacing the telephone handset will also end the call, which will then be removed from the Active Call Window.

7.4 Send Call to Voicemail

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

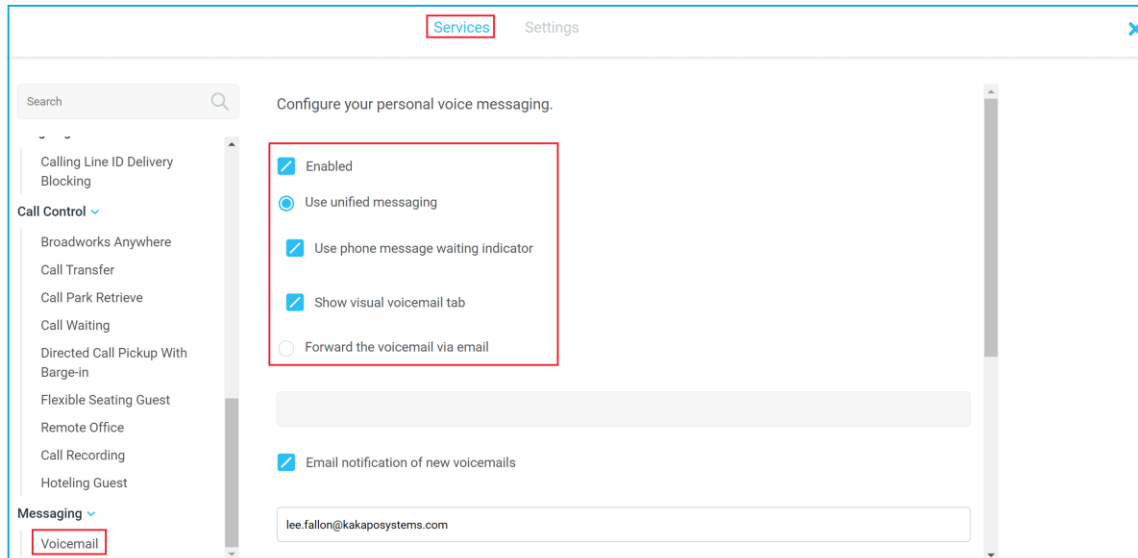
Please note that if voicemail is not assigned or is disabled, the button will not be visible.

7.4.1 Retrieving Voicemail Messages via Voicemail Button

When no calls are currently selected, clicking the Voicemail button will dial the user into their voice portal. The phone will default to hands-free speaker phone if it has that capability.

7.4.2 Retrieving Voicemail Messages via Voicemail tab


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 through the PC's default media player. Right click to save locally or delete. In order for the Voicemail tab to appear, Supervisor must be configured for "Use unified messaging" and "Show visual voicemail tab" in Voicemail settings as below.



7.5 Transferring a Call

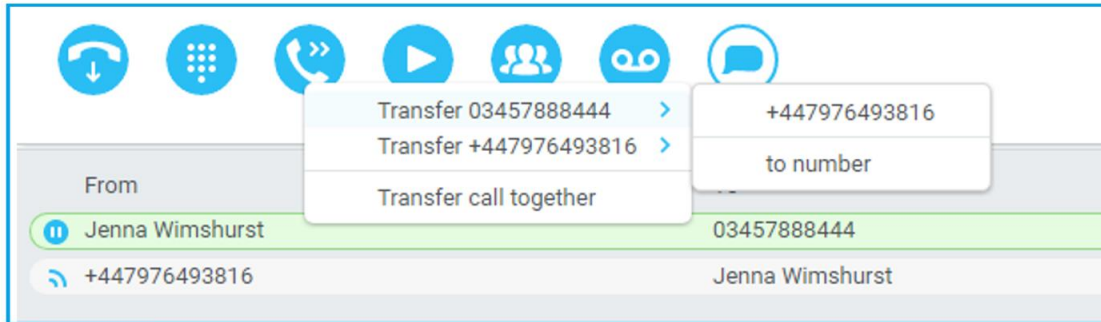
There are two ways to transfer a call; Announced Transfer, where you introduce the call to the receiving party before putting the call through, and Blind Transfer, where you transfer the caller directly to a recipient without introducing the call. Please note that calls can be transferred both to internal users and external contacts.

7.5.1 Announced Transfer

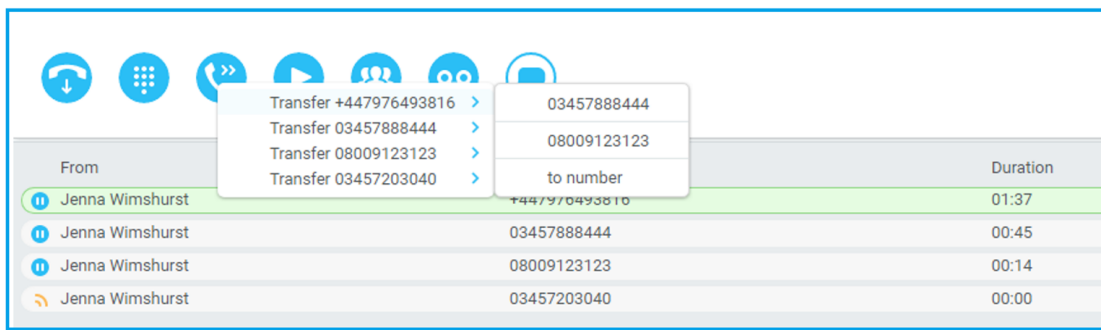
Receive and answer an inbound call. Make a new call to the desired destination extension or number as described Make a Call above. This will automatically place the first caller on Hold and will open a new call in the Active Call Window. Once the called party answers, click Transfer  and select the context menu option to transfer both calling parties together. Both calls will now disappear from the Active Call Window. Note: The user is not limiting to transferring received calls. They can make two outbound calls and then use transfer to “bridge” them together.

Calls can also be transferred together by dragging one call on top of another within the Active Call List.

Example 1 – Transfer with two live calls



Example 2 – Transfer with four live calls

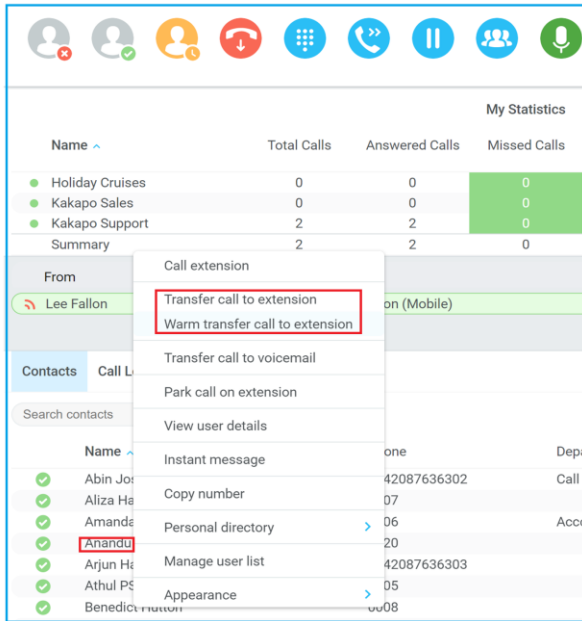


7.5.1.1 Warm Transfer

Unity Supervisor 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, automatically disappearing from your active call window.

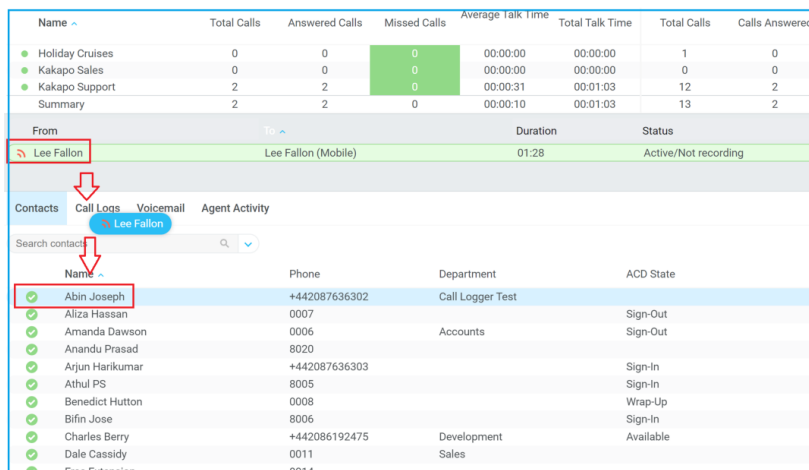
Unity Supervisor can be configured to automatically blind transfer a call by dragging the call from the Active Call Window and dropping it on a user icon or number icon in the Contacts panel, or dropping it onto a call center queue [if supervisor is configured as an supervisor with call center queues].

Note: Unity can be configured to display a menu when dropping a call onto a user icon. If no menu options are selected the blind transfer is performed. If menu options are selected, click “Transfer call to extension” to also perform blind transfer. For more information on Drag & drop refer to section 9.




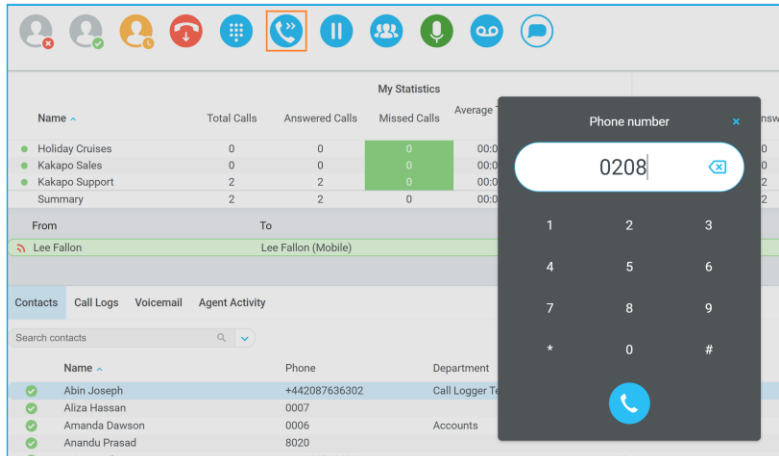
7.5.2.1 Using Contacts Panel Drag and Drop

Unity Supervisor allows the Supervisor to click and select an active call and then drag the call to a specific user. Left click and hold down on the calling name in the From pane, then drag the call to the desired extension for warm/cold/straight to voicemail.



7.5.2.2 Using Transfer Button

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

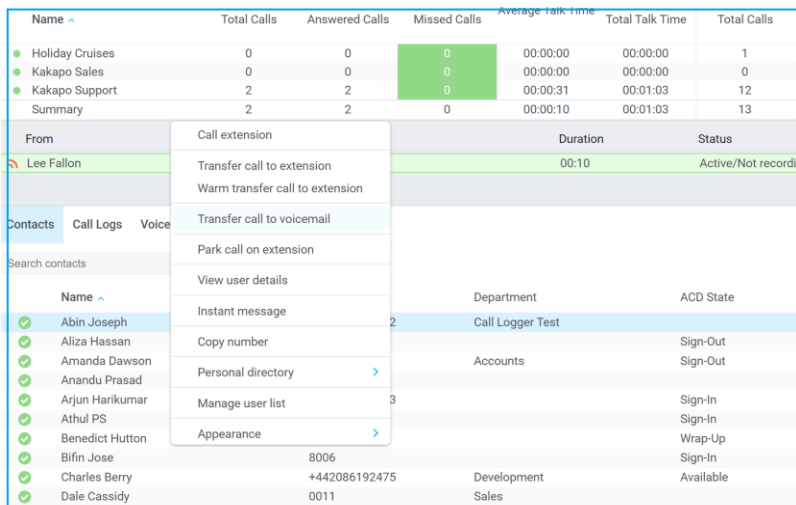


7.5.3 Transfer to Voicemail

The option to Transfer to voicemail is valid only for internal company users that have Voicemail assigned and activated.

7.5.3.1 Using Contacts Panel Right Click - Voicemail

While on an active call, right click a user in the User Status list and select “Transfer to voicemail”. This will send the selected call directly to the destination extension voicemail without introducing ringing.



7.5.3.2 Using Drag and Drop


If configured, Unity will display “Transfer to voicemail” in the list when an active call is dragged onto the destination user icon in the Contacts panel. For more information, refer to section 9.

7.5.4 Transfer to Mobile

If the destination user has a mobile number entered as part of their profile in BroadWorks, you have the option to right click and select either Dial Mobile [to perform an announced transfer] or Transfer Call to Mobile [to perform blind transfer].

7.5.4.1 Using Contacts Panel Right Click - Mobile



Right click the desired user in the Contacts panel. To announce the call, click Dial Mobile. Once the

recipient answers, click Transfer  and select the context menu option to transfer the calls together. To blind transfer the call without introduction click Transfer call to mobile.

7.5.4.2 Using Drag and Drop


If configured, Unity will display “Transfer to mobile” in the list when an active call is dragged onto the destination user icon in the Contacts panel. For more information, refer to section 9.

7.6 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. When a call is on Hold, the blue Hold icon is shown in miniature to the left of the call in the Active Call Window and the status is On Hold, as shown below. You can also double click on the call in the call window pane to pause/resume.

KAKAPO SYSTEMS												
My Statistics						Overall Queue Statistics						
Name ^	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Holiday Cruises	0	0	0	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00
Kakapo Support	2	2	0	00:00:31	00:01:03	12	2	10	0	00:00:00	00:00:07	00:00:00
Summary	2	2	0	00:00:10	00:01:03	13	2	11	0	00:00:00	00:00:02	00:00:00
From	To		Duration		Status							
Lee Fallon	Lee Fallon (Mobile)		00:16		On hold							

7.6.1 Placing a Call on Hold

To place a current active call on Hold, click the red Hold button.  The call status will now show as on hold in the Current Call List and the icon will change to reflect this call state.


7.6.2 Retrieving a Held Call


Click the held call in the Current Call List to select it. Click the Retrieve button  to take the call off hold, you can also double click the call to retrieve it. Please note that any other active calls will be placed on hold before the selected call is retrieved, meaning you can toggle between call by double-clicking them in the Active Call Window.


7.7 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.

7.7.1 Starting a Conference Call


Once an active call is established [that you have either made or received] call a second person. You can do this by clicking the Dial button  or double clicking a user in the Contacts panel or Search, or Call Log lists. Making this call will automatically place the first caller on Hold.

Once the second party has answered the call, click the Conference button  and a new conference will be created between you and the other two parties. This is represented in the Active Call Window as shown below:

From	To	Duration	Status
Lee Fallon	07756506804	00:49	Active (conference)/Not recording
 Lee Fallon	Lee Fallon (Mobile)	00:34	Active (conference)/Not recording

Selecting either call and clicking Hold will place the conference call on hold, during which time the other callers can still talk to each other.

7.7.1.1 Adding Multiple Parties

Once you have a conference established you can add additional parties by calling them. This will place the existing conference on hold. Now click the Conference button . You will be prompted to add the new party to the existing conference as below.

File
Messaging
Tools
Help

Conference


KAKAPO SYSTEMS

My Statistics						Overall Queue Statistics							
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staff Ratio
Holiday Cruises	13	0	13	00:00:00	00:00:00	44	0	44	0	00:00:00	00:00:00	00:00:00	2/6
Kakapo Sales	0	0	0	00:00:00	00:00:00	3	1	2	0	00:00:00	00:01:28	00:00:00	3/10
Kakapo Support	6	0	4	00:00:00	00:00:00	11	2	9	0	00:00:00	00:00:06	00:00:00	4/8
Summary	19	0	17	00:00:00	00:00:00	58	3	55	0	00:00:00	00:00:31	00:00:00	9/24

From	To	Duration	Status
Lee Fallon	Lee Fallon (Mobile)	01:43	Active (conference)/Not recording
Lee Fallon	07756506804	00:10	Active (conference)/Not recording

Please note that conference calls can be started with any two remote calls, regardless of the direction of either call or if the number is internal or external [for example between two mobile calls].

7.7.2 Ending a Conference Call

To remove a caller from the conference call but continue speaking to the other caller[s], simply select the call to release in the Active Call Window and click the Release button  as you would normally. This will release the selected party and will show only the remaining party[s] in the Active Call Window.

To end a conference call but leave the two remote parties in conversation with each other, click the Transfer button and select the “leave conference” menu option, as shown below.

Transfer calls together (leave conference)

7.7.3 Conference Bridge Integration

Unity allows the user to right click the Conference button to view or copy details of their “reservationless” conference bridge(s), or to call a bridge as a moderator. This feature is only available if the “Meet-Me Conferencing” feature has been configured in BroadWorks.

The screenshot shows a user interface for a conference bridge. At the top, there is a button labeled "My conference bridge" with a right-pointing arrow. A dropdown menu is open, showing three options: "Show details", "Copy details to clipboard", and "Call bridge as moderator". Below the button is a section titled "My Statistics" which contains a table with four columns: "Missed Calls", "Average Talk Time", "Total Talk Time", and "Total Calls". The table has four rows of data.

Missed Calls	Average Talk Time	Total Talk Time	Total Calls
0	00:00:00	00:00:00	1
0	00:00:00	00:00:00	0
0	00:00:31	00:01:03	12
0	00:00:10	00:01:03	13

7.8 Call Recording

If the Call Recording User service is assigned then the user may be able to manage call recording, although this depends on the functionality offered by the VoIP platform and service configuration parameters. If this service isn't assigned, then the Call Recording button is not displayed in the main window.

7.8.1 Changing the Call Recording Option

Right-click the Recording button to select the call recording option, as below. Please note that depending on permissions this may not be available.

The screenshot shows a user interface with a "Recording" button. A dropdown menu is open, displaying six options: "Always", "On Demand" (which is selected with a blue checkmark), "Never", "Always with Pause/Resume", and "On Demand with User Initiated Start". Below the dropdown menu, a portion of the "My Statistics" table is visible, showing the first row with values 0, 00:00:00, 00:00:00, and 1.

Missed Calls	Average Talk Time	Total Talk Time	Total Calls
0	00:00:00	00:00:00	1

Call Recording options are:



Option	Description
Always	Calls are automatically recorded from the beginning of the call. There is no option to pause or stop recording.
On Demand	Calls are not automatically recorded from the start, but recording can be started at any time during the call in which case the entire call will be recorded.
Never	Calls are never recorded and recording cannot be started while a call is in progress.
Always with Pause/Resume	All calls are automatically recorded from the beginning of the call, but recording can be paused and resumed, which is especially important when taking credit card details over the phone [that need to be omitted]. This will still result in a single recording for the call, regardless of how many times it was paused and resumed.
On Demand with User Initiated Start	Calls are not automatically recorded from the start, but recording can be started at any time. However, any conversation before the recording was started will not be included in the recording. Recording can be paused and resumed, which will result in different recordings being created for a single call.

Please note the call recording options can be disabled through the Unity partner portal, thereby preventing the user from changing them in Unity.

7.8.2 Controlling Call Recording

You can start, stop, pause and resume call recording depending on the Call Recording Option currently selected. Left-click the Recording button to manage recording for the selected call in the Active Call Window will toggle the option depending on the current recording state. The call recording button will

change   to indicate this. When set as Always with Pause/Resume, the user can left click to

Pause/Resume and the button will toggle as Resume [recording]  or Pause .

When set as “On Demand With User initiated Start” left clicking the call recording button presents the following menu to allow the user to control the call recording behaviour.

Click the Recording button again to continue/restart recording the call.

The Active Call List will also indicate the recording state of all calls, as shown below.

From	To	Duration	Status
Lee Fallon	Lee Fallon (Mobile)	00:10	Active/Recording paused

8 ACTIVE CALL WINDOW

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

8.1 Window Layout

From	To	Duration	Status
Lee Fallon	Lee Fallon (Mobile)	00:11	Active/Recording

From – This field will display the incoming CallerID or the name if it is matched in the Group/Enterprise directory, Personal Contacts or Outlook Contacts.

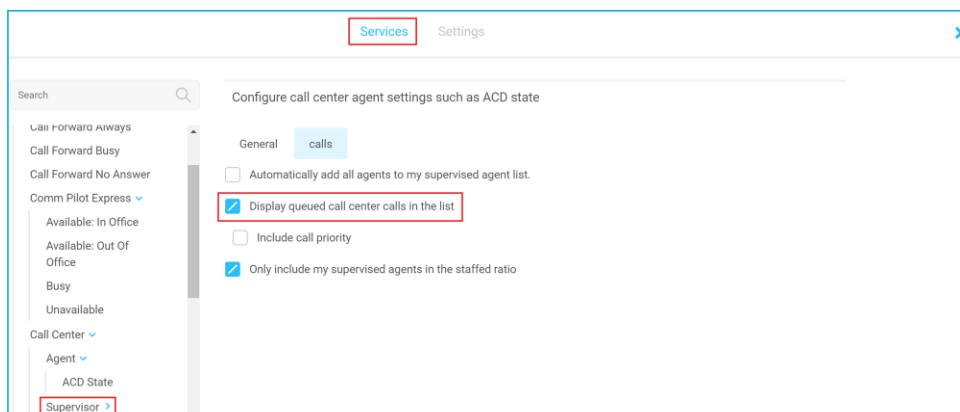
To – This field displays the name of the user, hunt group or call center that has been called ensuring the call can be answered appropriately.

Duration – This displays the total time elapsed since the call was first answered. The timer does not restart when the call is placed on hold.

Status – This shows the Ringing/Active on On Hold status of each call.

8.1.1 Queued Calls/Calls in Queue

Users can optionally see all calls in queue for the Call Centers they are joined to, as shown below. To set this go to Settings>Services>Supervisor and tick the relevant box. If the box is greyed out, then the setting “User can choose to see queued calls” needs to be enabled in the Kakapo Portal underneath the Branding section.



Details
Automatic Assignment
Branding
Portal User Accounts
License Details
Groups
History Log

Branding Details

Call Center

Default ACD Password

?

Get Reason Codes URL

Set Reason Codes URL

Prevent User From Joining Call Centers

OFF

Record Call Center Events

OFF

Report Viewer Is Available

ON

User Can Choose To See Queued Calls

ON

Statistics Refresh Frequency Range (seconds)

60

8.2 Managing Multiple Calls



To manage a particular call, first select it by clicking it in the Current Call List. If there is only one call in the list it will be selected automatically. You can then use the call control buttons to perform different actions on the call. There is no limit to the number of calls that can be displayed in the Current Call List, this is limited by the number of simultaneous calls allowed and if the Call Waiting user service is assigned and active.

You can also double-click an incoming [unanswered] call to answer it, or to retrieve it if currently on hold.

9 DRAG AND DROP

Many common call handling actions can be performed with drag and drop, as well as right click and call control buttons.

9.1 Make a Call to a User or Number

Drag a user icon  or a speed dial shortcut icon  from the Contacts panel up into the Active Call Window to make a new call to the selected user or number.

9.2 Transferring a Call to a User

Drag a live call onto a user to either perform blind transfer, or to populate a drop list with call handling options. The drag and drop behaviour for this action is configured in Settings as shown below.

Name ^	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered
Holiday Cruises	0	0	0	00:00:00	00:00:00	1	0
Kakapo Sales	0	0	0	00:00:00	00:00:00	0	0
Kakapo Support	2	2	0	00:00:31	00:01:03	12	2
Summary	2	2	0	00:00:10	00:01:03	13	2

From	To ^	Duration	Status
Lee Fallon	Lee Fallon (Mobile)	01:28	Active/Not recording

Contacts Call Logs Voicemail Agent Activity

Lee Fallon

Search contacts

Name ^	Phone	Department	ACD State
Abin Joseph	+442087636302	Call Logger Test	
Aliza Hassan	0007		Sign-Out
Amanda Dawson	0006	Accounts	Sign-Out
Anandu Prasad	8020		
Arjun Harikumar	+442087636303		Sign-In
Athul PS	8005		Sign-In
Benedict Hutton	0008		Wrap-Up
Bifin Jose	8006		Sign-In
Charles Berry	+442086192475	Development	Available
Dale Cassidy	0011	Sales	
Free Extension	8014		


9.3 Make a Call to a Call Center Queue

When the supervisor is configured as an agent, drag a call center queue from the Personal Wallboard to the Active Call Window to make a call to that call center.

9.4 Transferring a Call to a Call Center Queue

If supervisor is configured as an agent, you can drag a current call in the Active Call Window up and drop it on a Call Center in the Personal Wallboard. This will blind transfer the call to the call center.

9.5 Send to Voicemail

Dragging an unanswered call from the Active Call Window onto the Voicemail button  will blind transfer the incoming call to your voicemail.

9.6 Call Control

Dragging a call over the Hold/Retrieve, Answer/Release, Transfer or park buttons will perform that action on the selected call.

9.7 Send New Instant Message

Click the mail button top right of call control panel to open a new IM chat.

File Messaging Tools Help

Open Chat

KAKAPO SYSTEMS

My Statistics						Overall Queue Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Holiday Cruises	0	0	0	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00	2	0	2	0	00:00:00	00:00:00	00:00:00
Kakapo Support	2	2	0	00:00:31	00:01:03	17	2	15	0	00:00:00	00:00:07	00:00:00
Summary	2	2	0	00:00:10	00:01:03	20	2	18	0	00:00:00	00:00:02	00:00:00

Drop person here to begin a call

Contacts Call Logs Voicemail Agent Activity My status: Available: Out Of Office

Search contacts

Name	Phone	Department	ACD State	Status
Abin Joseph	+442087636302	Call Logger Test		
Aliza Hassan	0007		Sign-Out	
Amanda Dawson	0006	Accounts	Sign-Out	
Anandu Prasad	8020			
Arjun Harikumar	+442087636303		Sign-In	

A new chat window will open up where you can click and drag other users.

New IM chat window opens up

Chris Tutt

Chris

Chris Tutt +442086192470

New chat

Chris Tutt

Hi Chris, Unity Supervisor Web is ace :-)

Send

Also see section 11 on Instant Messaging.

9.7.1 Add Participant to Existing IM Session

Drag a user icon onto an existing IM and choose “Add to the conversation”

The screenshot shows the KAKAPO SYSTEMS interface. At the top, there's a toolbar with various icons. Below it, the 'My Statistics' table is visible, showing metrics for different departments. To the right, the 'Overall Queue Statistics' table is also present. In the bottom left, the 'Contacts' list shows three users: Dale Cassidy, Steve Tuft, and Steve Wardle. A red arrow points from the 'Steve Tuft' user icon to the '+ Add to chat' button in the top right corner. Below the contacts list, there's a note: 'Left click, hold and drag'.

Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time
Holiday Cruises	0	0	0	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00
Kakapo Support	2	2	0	00:00:31	00:01:03
Summary	2	2	0	00:00:10	00:01:03

Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time
1	0	1	0	00:00:00	00:00:00	00:00:00
2	0	2	0	00:00:00	00:00:00	00:00:00
17	2	15	0	00:00:00	00:00:07	00:00:00
20	2	18	0	00:00:00	00:00:02	00:00:00

9.7.2 Transfer Call to IM Participant

Drag a call from the Active Call Window onto an IM session in the Docked IM Window and you will see a prompt to transfer the call. This is particularly useful if you want to confirm the recipient’s availability before you transfer.

The screenshot shows the KAKAPO SYSTEMS interface. At the top, there's a toolbar with various icons. Below it, the 'My Statistics' and 'Overall Queue Statistics' tables are visible. In the bottom left, the 'Active Call Window' shows a call from Lee Fallon to Lee Fallon (Mobile) with a duration of 00:16 and status 'Active/Not recording'. A red arrow points from the 'Lee Fallon' call entry to the 'Transfer call to extension' button in the 'IM Session' window. Below the call entry, there's a note: 'Left click, hold and drag'.

From	To	Duration	Status
Lee Fallon	Lee Fallon (Mobile)	00:16	Active/Not recording

When dropping a call onto a multi-party IM session you will be prompted where to transfer the call.

The screenshot shows the KAKAPO SYSTEMS interface. At the top, there's a toolbar with various icons. Below it, the 'My Statistics' and 'Overall Queue Statistics' tables are visible. In the bottom left, the 'Active Call Window' shows a call from Lee Fallon to Lee Fallon (Mobile) with a duration of 00:28 and status 'Active/Not recording'. A red arrow points from the 'Lee Fallon' call entry to the 'Transfer call to extension' button in the 'IM Session' window. Below the call entry, there's a note: 'Left click, hold and drag'.

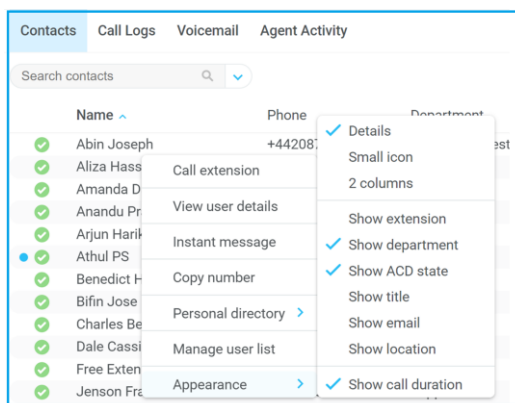
From	To	Duration	Status
Lee Fallon	Lee Fallon (Mobile)	00:28	Active/Not recording

10 CONTACTS PANEL

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.

10.1 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.



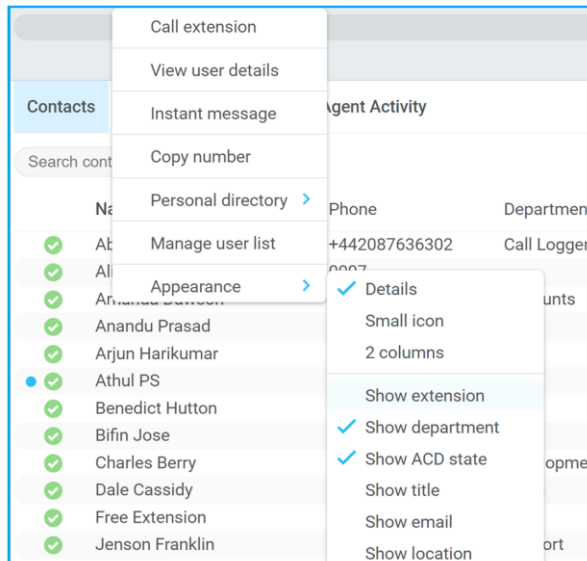
10.1.1 Details View

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].

The screenshot shows the 'Contacts' tab in 'Details View'. The interface includes tabs for 'Contacts', 'Call Logs', 'Voicemail', and 'Agent Activity'. A search bar is at the top. The user list is expanded to show columns: 'Name', 'Phone', 'Department', 'ACD State', and 'Status'. A scrollbar is visible on the right side of the list. The user 'Athul PS' is selected, indicated by a blue dot.

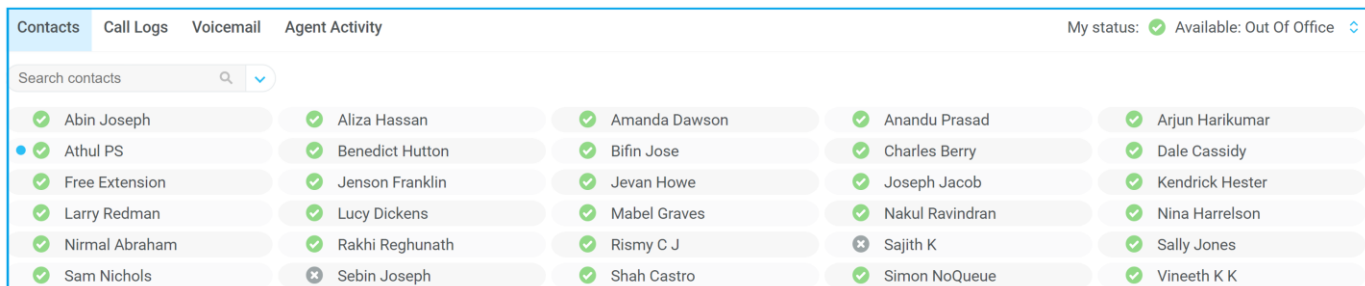
Name	Phone	Department	ACD State	Status
Abin Joseph	+442087636302	Call Logger Test		
Aliza Hassan	0007		Sign-Out	
Amanda Dawson	0006	Accounts	Sign-Out	
Anandu Prasad	8020			
Arjun Harikumar	+442087636303		Sign-In	
Athul PS	8005		Sign-In	
Benedict Hutton	0008		Wrap-Up	
Bifin Jose	8006		Sign-In	
Charles Berry	+442086192475	Development	Available	
Dale Cassidy	0011	Sales		
Free Extension	8014			
Jenson Franklin	+442086192474	Support	Sign-Out	

With this view the sort order for each column can be set, which is saved when Unity is closed. You can also configure Unity to display or hide the extension, department, ACD state and call duration columns.



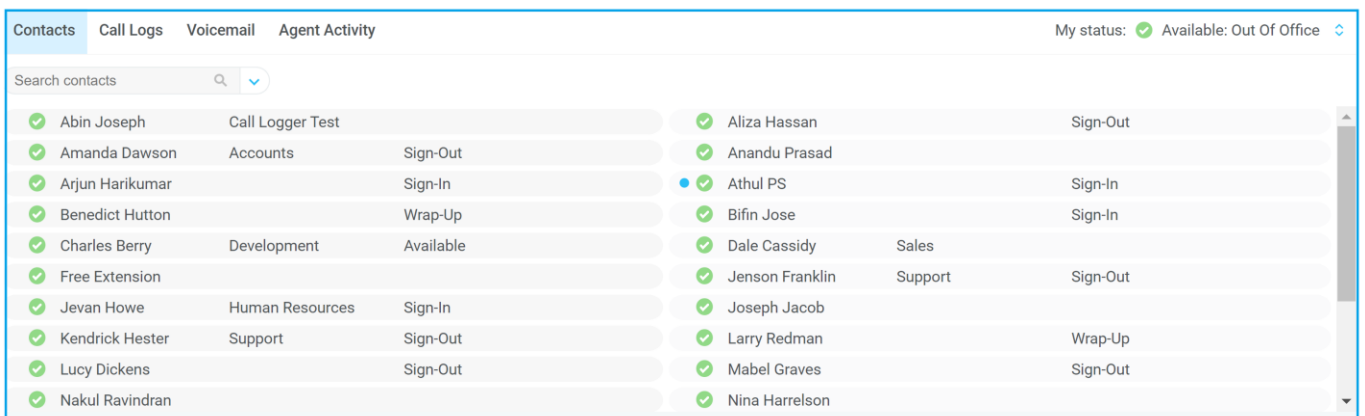
10.1.2 Small Icon View

This view combines a simplified look and space reduction.



10.1.3 2 Columns View

This view is the most popular with Supervisor Web App users.



10.2 User Icons

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

✓	Available: In Office
✓	Available: Out Of Office
🕒	Busy
✕	Unavailable
✓	None
🚫	Do Not Disturb
📞	Call Forward Always
📞+	Connect to a device
🏠➔	Remote Office
✕	Out of office assistant

10.2.1 User Icon Engaged Tool Tip





Hovering your mouse over an engaged or DND icon will reveal more information about their current state, if available. For engaged users this will include the name or number of the party they are engaged to and the duration off the current call as below [this feature can be disabled for privacy reasons].

✓ Abin Joseph		✓ Aliza Hassan	Sign-Out
✓ Amanda Dawson	Sign-In	✓ Arjun Harikumar	Sign-In
✓ Athul PS	Available	✓ Benedict Hutton	Wrap-Up
✓ Bifin Jose	Sign-In	✕ Charles Berry	Unavailable - Lunch
✓ Dale Cassidy		✓ Flexible Seating 001	Talking to Chris Tutt (2470) - 00:04
✓ Flexible Seating 002		✓ Flexible Seating 003	
✓ Flexible Seating 004		✓ Gopikrishnan V	Sign-Out
✓ Jenson Franklin	Sign-Out	✓ Jevan Howe	Sign-In
✓ Kathryn Vincent	Sign-In	✓ Kendrick Hester	Sign-Out
✓ Larry Redman	Sign-In	✓ Lucy Dickens	Sign-Out
✓ Mabel Graves	Sign-Out	✓ Nina Harrelson	
✓ Robbie Sears	Sign-Out	✓ Sally Jones	
✓ Sam Nichols	Available	✓ Sebin Joseph	Sign-Out
✓ Shah Castro	Sign-Out	✓ Steve Tutt	Available
✓ Steve Wardle	Sign-In	✓ Vineeth K K	

Please note that the tool tip is only available when displaying the contacts using the “Small Icon” or “2 Column” view.

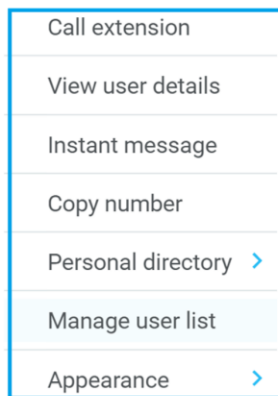
10.2.2 Instant Messaging Availability

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 the envelope at bottom right of the user icon, as per the following examples.

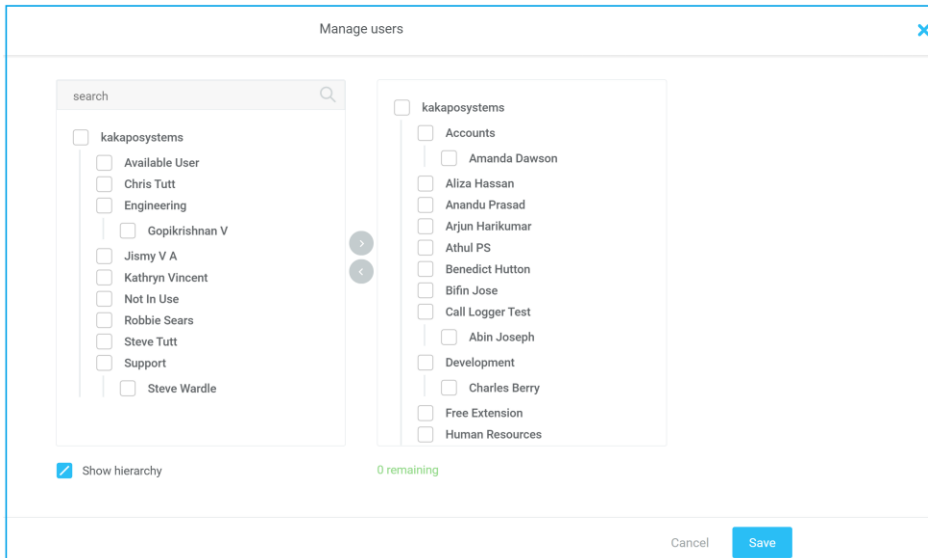
	Ringing. Unity open and available for IM
	DND/Unavailable profile. Unity open and available for IM
	Engaged. Unity open and available for IM
	Available/on-hook. Unity open and available for IM

10.3 Managing Monitored Users in the Contacts Panel

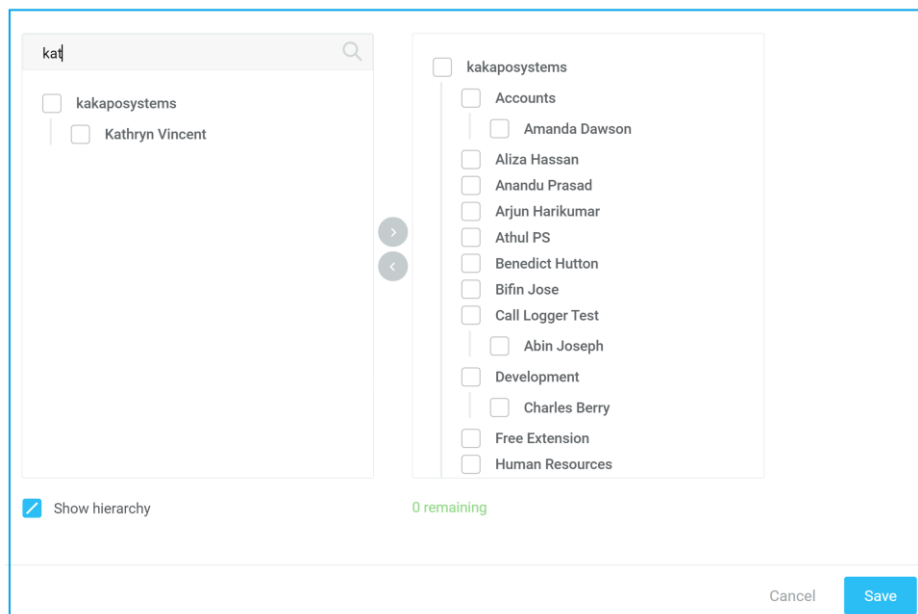
The Contacts panel will display 30 users. In the Contacts panel right click anywhere and click “Manage user list”. This will allow you to choose which users to display.



You will then be able to move users or departments between the lists either by double-clicking them or using the arrow button. All users in the right-side list will be monitored in the Contacts panel. This list is saved when Unity is closed.



The search box at top left will dynamically search the group or enterprise directory.



10.4 Performing Call Control Actions in the Contacts Panel

There are many call control functions that can be performed by right-clicking a monitored user in the main Contacts panel or Search. The menu options displayed will dynamically change to only show those available depending on the state of the monitored user and/or the state of the selected call in the Active Call Window [if there is one]. For example, “Transfer to voicemail” will not be available if the user does not have the voicemail service assigned and “Camp call on extension” will not be available unless there is a live call selected in the Active Call Window.

KAKAPO SYSTEMS

My Statistics

Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time
Development Queue	0	0	0	00:00:00	00:00:00
Holiday Cruises	0	0	0	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00
Kakapo Support	0	0	0	00:00:00	00:00:00
Summary	0	0	0	00:00:00	00:00:00

Overall Queue Statistics

Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
115	9	106	0	00:00:00	00:00:12	00:00:36
46	0	46	0	00:00:00	00:00:00	00:00:00
3	1	2	0	00:00:00	00:01:28	00:00:02
13	4	9	0	00:00:00	00:00:04	00:00:36
177	14	163	0	00:00:00	00:00:26	00:00:18

Drop person here to begin a call

Contacts | Call Logs | Agent Activity

My status: Available: Out Of Office

Search contacts

Name	Phone	Department	ACD State	Status
Abin Joseph	+442087636302	Call Logger Test		
Aliza Hassan	0007			
Amanda Dawson	0006	Accounts		
Anandu Prasad	8020			
Arjun Hanikumar	+442087636303			
Athul PS	8005			
Benedict Hutton	0008			
Bifin Jose	8006			
Charles Berry	+442086192475	Development		
Dale Cassidy	0011	Sales		
Free Extension	8014			

Google Chrome

Call parked from
Click here to pickup the call
supervisor.unityclient.com

10.5 Camp Call on Extension

Will camp the call onto the engaged monitored user. When the user goes back on-hook the camped call will be delivered and their phone will start ringing. If the user does not go back on-hook before the camp timer expires the call will return to the Supervisor user.

Feature Dependency:

Must have a live call in the Active Call Window

The Camp Call option will only be available if activated in Settings > Call Control > Call Transfer as below.

Services | Settings

Configure call transfer recall and busy camp on features. Busy camp on allows you to hold a call against another person's [busy] extension until they are available.

☒ Allow call transfer recall

Number of rings before recall

☒ Allow busy camp on

Camp calls for (seconds)

☐ Use diversion inhibitor for blind transfer

☐ Use diversion inhibitor for consultative calls

☒ Allow transfer to voicemail for all internal users

Transfer calls to survey extension

Call Control

- Calling Line ID Delivery Blocking
- Broadworks Anywhere
- Call Transfer**
- Call Park Retrieve
- Call Waiting
- Directed Call Pickup With Barge-in
- Flexible Seating Guest
- Remote Office
- Call Recording
- Hotelling Guest

Messaging

- Voicemail

10.5.1 Call Mobile

Places call to mobile, assuming the mobile number has been populated in the BroadWorks user profile for that user. Any active calls are automatically placed on hold.

10.5.2 Transfer Call to Mobile

Performs blind transfer call to monitored users mobile.

Feature Dependency:

The destination user must have a mobile number entered in their user profile in BroadWorks
Must have a live call

10.5.3 Transfer Call to VoiceMail

Performs blind transfer to the destination user's voicemail.

Feature Dependency:


The destination user must have Voice Messaging User service assigned
Must have a live call

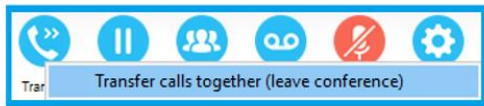
10.5.4 Barge into This Call

Makes an immediate three-way conference call with the Supervisor user, the monitored user and the third party the monitored user is talking to. All parties will be able to talk and hear each other. When attempting to barge into a call, if the phone plays a "number doesn't exist" tone then this means the monitored user cannot be barged into, because they have the Barge-In Exempt service assigned and activated. Only users without this service active can be barged into.

The Active Call Window will display like a normal conference call, as below, and the Supervisor user can Hold/Retrieve the same as for a conference call.

From	To	Duration	Status
Lee Fallon	07756506804	00:49	Active (conference)/Not recording
Lee Fallon	Lee Fallon (Mobile)	00:34	Active (conference)/Not recording

Please note that when leaving a call that you barged into, you must transfer the call parties together in order to leave the conference without ending the original call. To do this either drag one call on top of the other in the Active Call List, or press Transfer  then select the option to leave the conference, as shown below.



Feature Dependency:

The Supervisor user must have Directed Call Pick-Up with Barge-In service assigned

Monitored user must be engaged on a call

The monitored user must not have the Barge-In Exempt service active

10.5.5 View User Details

Performs a lookup on the user's profile as entered in BWKS. This includes their phone number, mobile and email address.

Steve Tutt

Title: Sales & Marketing Director

Email: steve.tutt@kakaposystems.com

Phone: +442086192471

Mobile:

Department:

Location: Wimbledon

OK









11 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.

The maximum character limit for each instant message is 700.

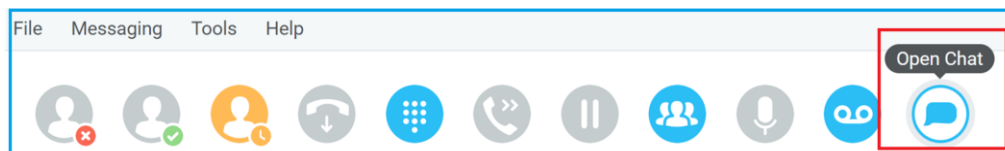
11.1 Online/Offline Indicator

A person that is running an instance of Unity, and therefore available to send an online IM to is indicated with a small envelope on their user icon. This applies across all the available, engaged, ringing and DND states as shown below.

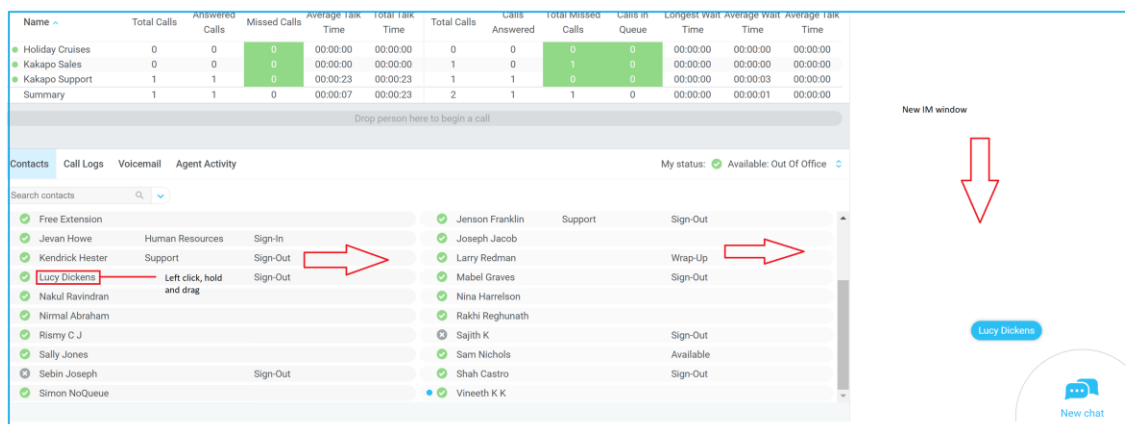
State	Online [Unity Open]	Offline [Unity Closed]
Available		
Ringing		
Engaged		
DND/unavailable profile		

11.2 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. Alternatively, you can select Messaging > Start Conversation from the top menu bar.



You can then select the users to include in the IM conversation. Please note that only online users will be displayed in the lists.



11.3 Adding Participants to an Existing IM Session

When an IM conversation is in the IM window 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.


The screenshot displays the Unity interface with two main sections: 'My Statistics' and 'Overall Queue Statistics'. Below these is a 'Drop person here to begin a call' area. The 'Contacts' panel is visible, showing a list of users. A red arrow points from the 'Sally Jones' contact in the list to the 'Add to chat' button in the top right corner of the interface. Another red arrow points from the 'Sally Jones' contact to the 'Drop person here to begin a call' area. A third red arrow points from the 'Sally Jones' contact to the 'Add to chat' button.

My Statistics						Overall Queue Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Average Talk Time	Total Talk Time	Total Calls	Answered Calls	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Holiday Cruises	0	0	0	00:00:00	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00
Kakapo Sales	0	0	0	00:00:00	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:00
Kakapo Support	1	1	0	00:00:23	00:00:23	1	1	0	0	00:00:00	00:00:03	00:00:00
Summary	1	1	0	00:00:07	00:00:23	2	1	1	0	00:00:00	00:00:01	00:00:00

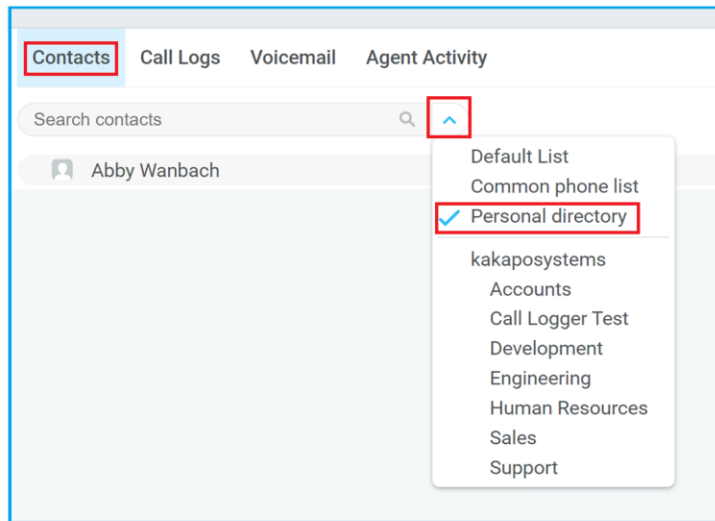
11.4 Send IMs to Offline Users

Even when a user is offline, Unity will allow you to send them an instant message which will then be stored and delivered the next time the user is online.

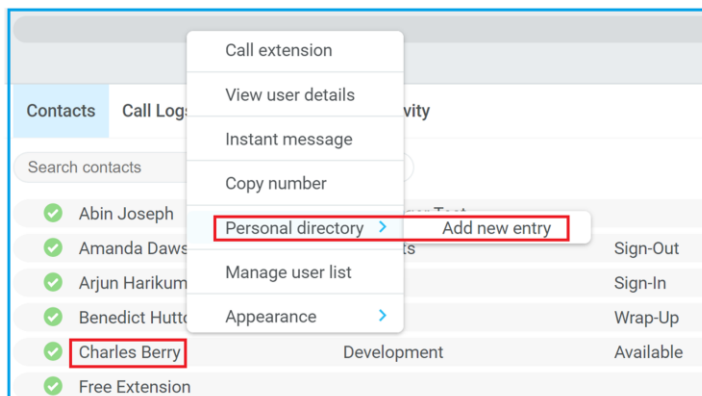
12 PERSONAL DIRECTORY

The Personal Directory is a repository on BroadWorks for each user to store personal speed dials. Using this feature in Unity will populate the directory on the host BroadWorks platform. Once numbers have been entered they are available in the Search panel or can be pinned to the main Contacts Panel. A Personal Directory entry is shown by a  icon. Double clicking the icon will make a call to the Directory number. The Personal Directory menu is available when right clicking a monitored user or in the Contacts panel.

Personal Directory – Blue drop down tab in Contacts



Personal Directory – Right click on monitored user

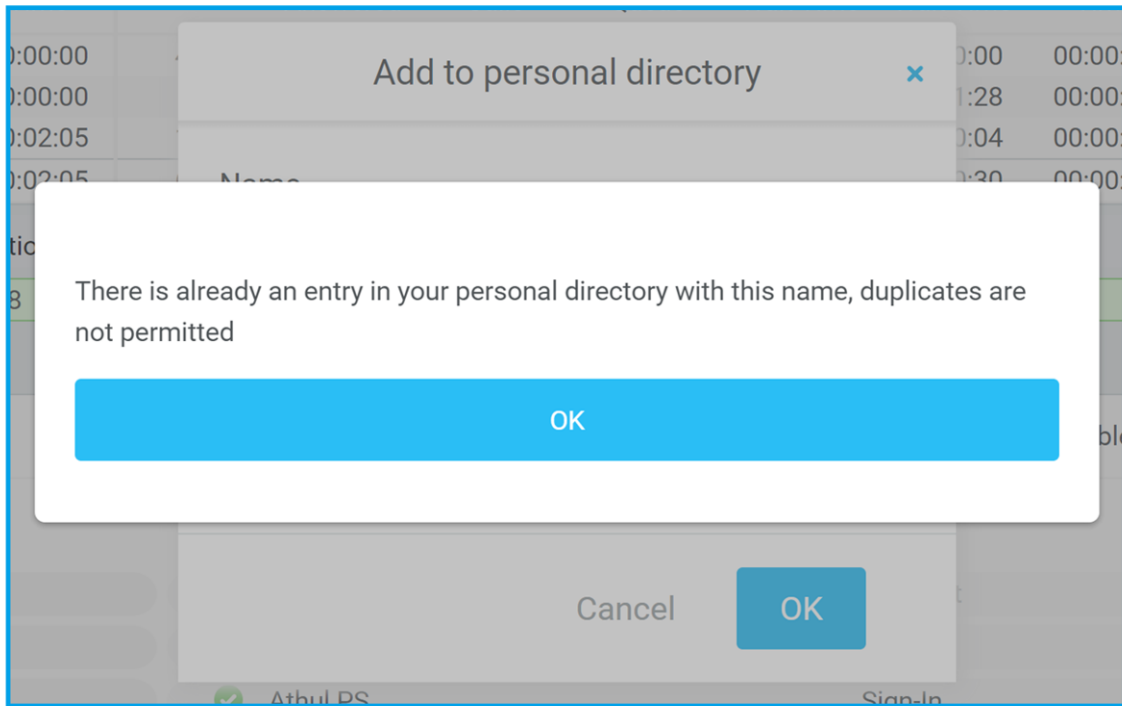


12.1 Add New Entry

Enter the Name and Number and click Ok

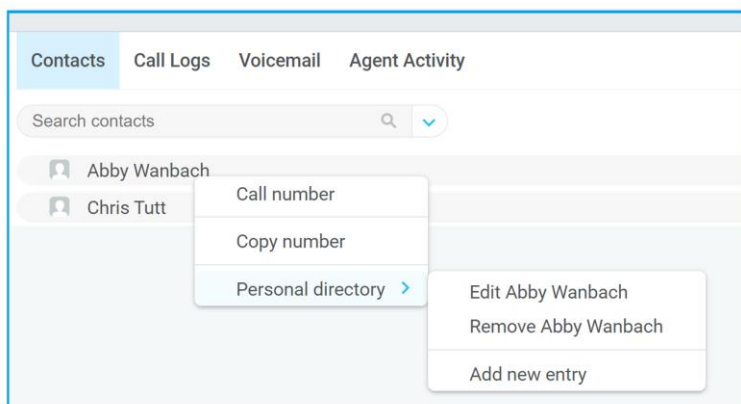
A screenshot of a dialog box titled 'Add to personal directory'. It contains two input fields: 'Name' with the text 'John Wick' and 'Phone' with the text '07542901160'. At the bottom, there are two buttons: 'Cancel' and 'OK'.

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



12.2 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".

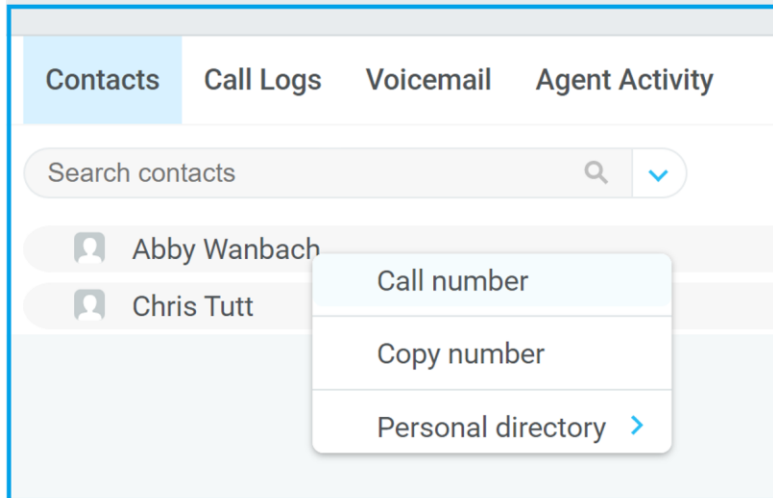


12.3 Remove Entry

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".

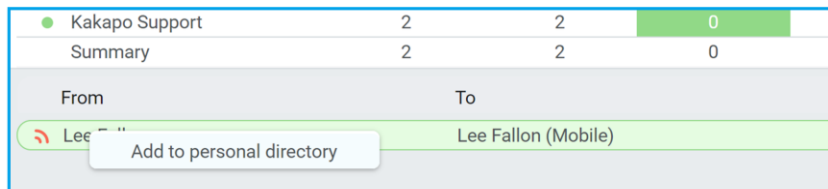
12.4 Dialling Directory Entry

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”.



12.5 Add Using Right Click

While on an active call right click the recipient icon or number in the Contacts panel or Search. You can then add this number to your personal directory. This also applies to the call log and voicemail lists



13 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 Group or Enterprise Common Phone List, the user’s own Personal Directory entries, and the Group or Enterprise Directory which includes all the other users as well as hunt groups, auto attendants and call centers

Directory Owner	Directory Type	Entry Type
BroadWorks	Group/Enterprise Directory	All other users for BLF presence as well as hunt groups and auto attendants
BroadWorks	Common Phone List	Shared contacts at the Group or Enterprise level
BroadWorks	Personal Directory	The user's own personal contacts
Outlook	Personal Contacts [private folder] Office 365	The user's own Outlook Contacts

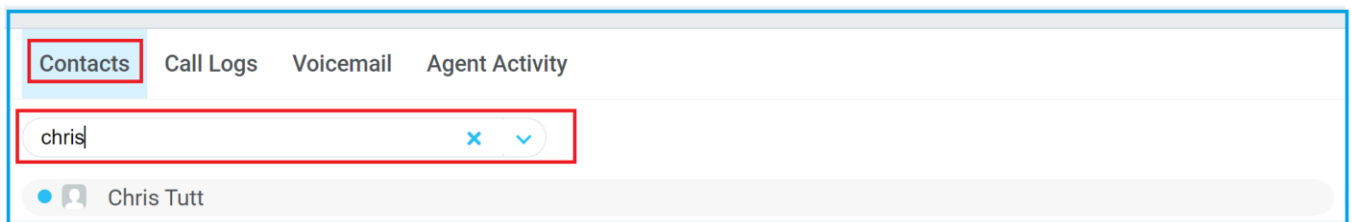
13.1 Loading Directories

Unity will load all directory entries into Contact Search on start. If users are added to the BroadWorks Group Directory while Unity is running, they will not be visible until Unity has restarted. Personal directory entries the user adds will be available to use immediately without restarting.


Please note: It is possible not to include the Common Phone List from the Group or Enterprise level when loading Unity, this is configured at the System Provider level of the Kakapo Partner Portal and will impact all users.

13.2 Contact Search Results Layout

To perform a contact search, type characters or numbers in the Search field and Unity will start dynamically populating a list of matching entries across all directories. The list will narrow as more characters or numbers are entered. Clearing the Search box and returning to the main Contacts panel can be achieved by clicking again in the Search field [provided "Clear the search box when activated" is enabled in Settings as outlined in the section below.



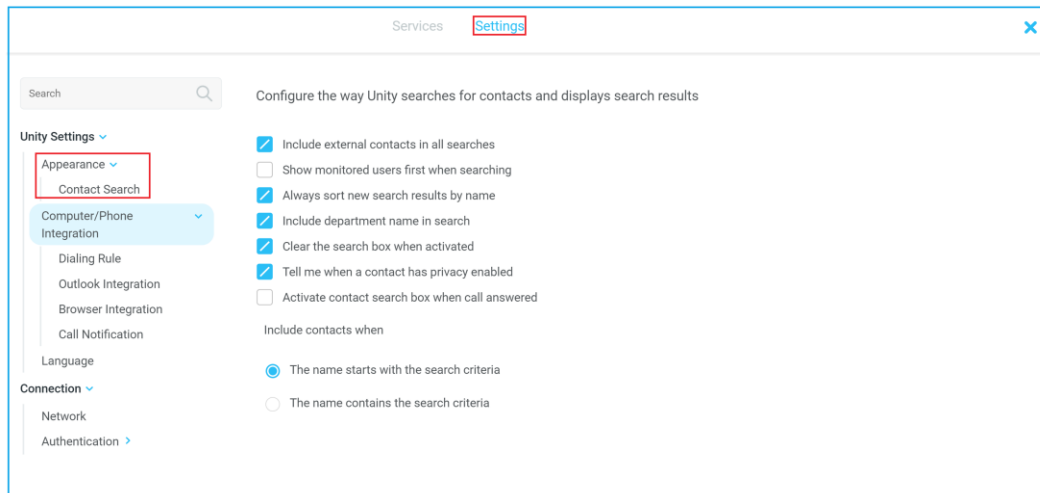
Search results will display each number for a contact as a separate line. Drag or double click the entry to make a call or right click to select a call action from the context menu.

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

It is also possible to search on department name to list all users of matching departments.

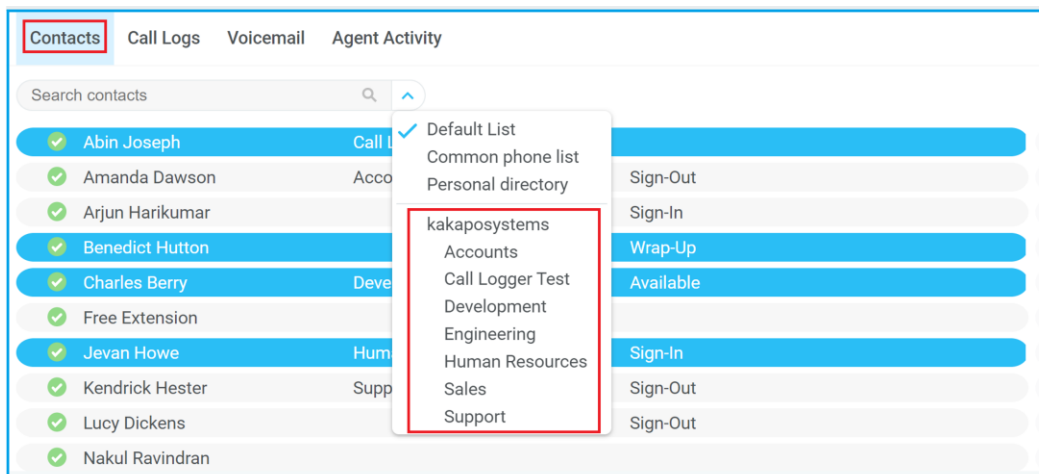
13.3 Contact Search Settings

Preferences for Search can be configured in Settings > Unity Settings > Contact Search. The order of search results can also be changed to display internal extension users first and the “Include department name in search” as shown above, can be toggled.



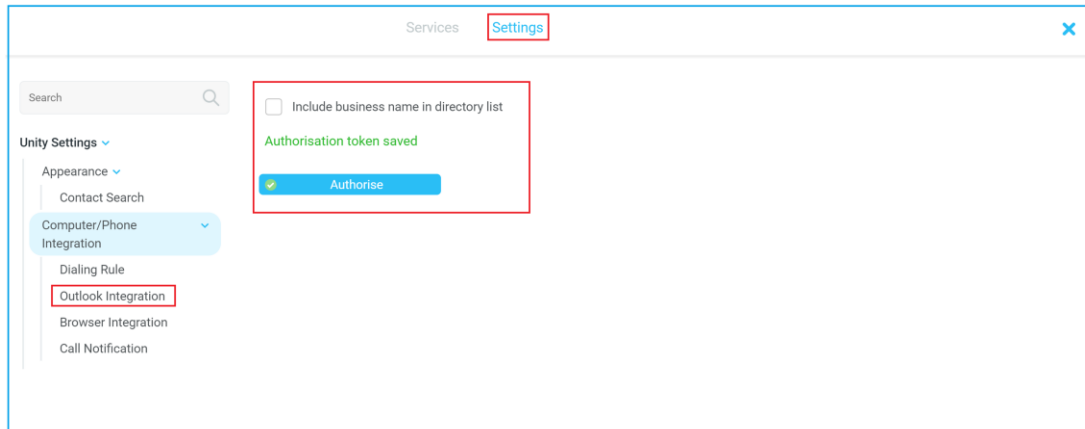
13.3.1 Listing Directories

Right-click the search box in the Contact list to view all directories available in Unity, then select the directory to load those contacts in the list, as below.



13.4 Configuring Outlook Contacts Preferences

The Outlook directories are both public and private folders and is configurable in Settings > Outlook Integration as below. You will need to click authorise and then enter your credentials when prompted by Office 365, and grant access to Unity to integrate with your contacts.



14 CALL LOGS

The Call Logs tab displays Missed, Received and Dialed Calls with a date and time stamp showing the most recent call at the top. Up to 20 numbers are listed for each call type. Direct calls **to the user as well as** hunt group and call center calls that have reached the Supervisor user are shown.

Contacts

Call Logs

Voicemail

Agent Activity

My status:

Available: Out Of Office

Missed calls

Received calls

Dialed calls

Name	Phone	Call Date <div></div>
Recent		
(Kakapo Sales)	+447542901160	05/30/2022 05:46:17 PM
(Kakapo Sales)	+447542901160	05/30/2022 05:44:16 PM
Later		
(Kakapo Support)	+447542901160	05/30/2022 05:41:17 PM
Joseph Jacob (Holiday Cruises)	+442086192480	05/30/2022 05:30:27 PM
(Kakapo Sales)		05/30/2022 05:00:13 PM
(Kakapo Sales)		05/30/2022 04:58:13 PM
(Kakapo Sales)		05/30/2022 04:56:13 PM
Chris Tutt	07956344419	05/30/2022 03:21:50 PM
Joseph Jacob	8019	05/30/2022 02:56:19 PM

Left click, hold and drag an entry to make a call to that number.

Overall Queue Statistics

Name ^	Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time	Staff Ratio
● Holiday Cruises	20	0	20	0	00:00:00	00:00:00	00:00:00	3/6
● Kakapo Sales	2	0	2	0	00:00:00	00:00:00	00:00:00	4/10
● Kakapo Support	16	4	12	0	00:00:00	00:00:10	00:00:00	2/8
Summary	38	4	34	0	00:00:00	00:00:03	00:00:00	9/24

Drop person here to begin a call

Contacts

Call Logs

Voicemail

Agent Activity

My status: ✓ Available: Out Of Office

Missed calls

Received calls

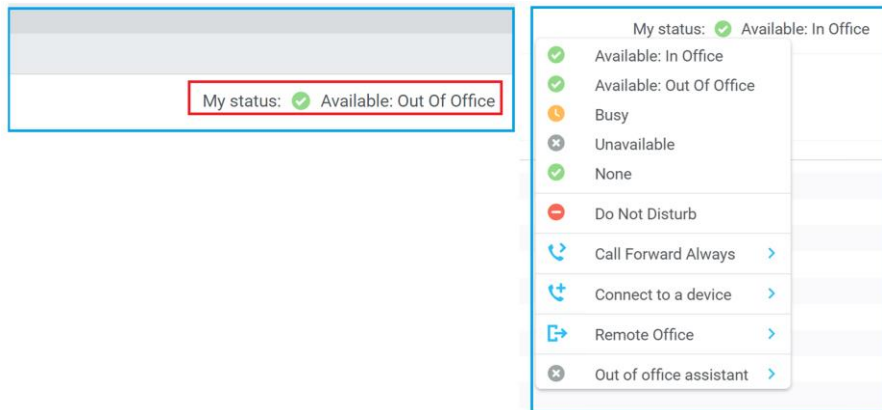
Dialled calls

(Kakapo Sales)

Name	Phone	Call Date
(Kakapo Sales)	+447542901160	05/30/2022 05:46:17 PM
(Kakapo Sales)	+447542901160	05/30/2022 05:44:16 PM
(Kakapo Support)	+447542901160	05/30/2022 05:41:17 PM
Joseph Jacob (Holiday Cruises)	+442086192480	05/30/2022 05:30:27 PM
(Kakapo Sales)		05/30/2022 05:00:13 PM
(Kakapo Sales)		05/30/2022 04:58:13 PM
(Kakapo Sales)		05/30/2022 04:56:13 PM

15 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. Unity will only display the options for the services that have been assigned to the user, available services are CommPilot Express (CPE), Do Not Disturb (DND), Call Forward Always (CFA), Remote Office and Hoteling Guest or Flexible Seating Guest (for hot-desk environments).

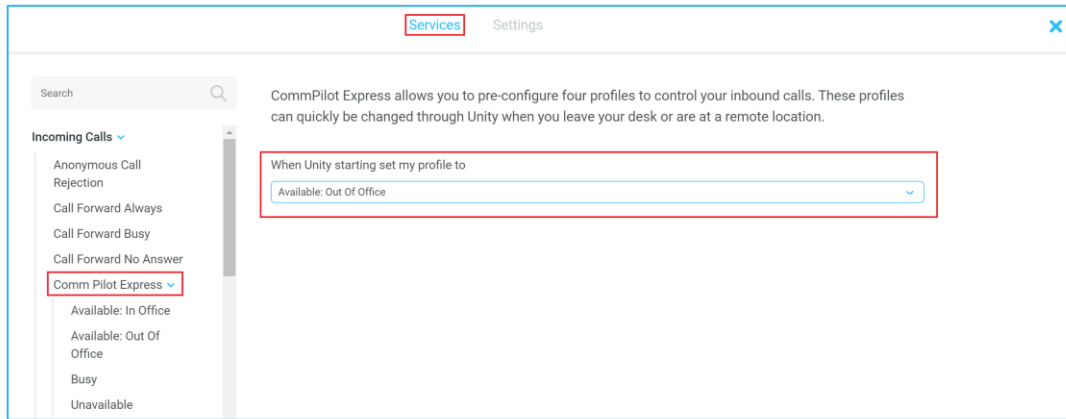


CommPilot profiles are also used to convey presence information to other users within the group or enterprise. As users change their CommPilot Express state, any Unity client that is monitoring that user [through the User Status list] will see their image change, as outlined below.

User State	Description	User Status Image
Available: In Office	I am in the office and available to receive calls.	
Available: Out Of Office	I am not in the office but am available to take calls	
Busy	I am currently busy (short term)	
Unavailable	I am currently unavailable (longer term)	
None	No call routing plan is in use	

15.1 Configuring CommPilot Express States

CommPilot Express allows the user to specify how inbound calls are to be handled. Once the four different profiles (above) have been configured in Settings, the profile in use can quickly be changed through the My Status link. Unity can also be configured to automatically apply a CommPilot Express profile when starting or closing, as below.



15.1.1 Available: In Office

This is the profile to use when you are working from the desk where your phone is located; it should represent “normal” routing rules.

A screenshot of the 'Available: In Office' profile configuration page. The page has a header with 'Services' and 'Settings' tabs. The main content area contains the following fields and options: A text box with the description 'This profile is used when you are working from your desk where your phone is located.'; A text box labeled 'Also ring'; A section labeled 'If busy:' with two radio button options: 'send call to voicemail' (selected) and 'forward call'; A text box labeled 'To'; A section labeled 'If not answered' with two radio button options: 'send call to voicemail' (selected) and 'forward call'.

15.1.2 Available: Out Of Office

This is the profile to use when you are away from your desk for an extended period, but still available for receive calls. Examples are when in a meeting or when travelling.

[Services](#)
[Settings](#)

This profile is used when you are working away from your desk for an extended period of time.

When a call arrives:

☒ send call to voicemail

☐ forward call

☐ Notify me of new voicemails via email

15.1.3 Busy

This is the profile to use when you are temporarily unavailable to take calls, for example when in a meeting where you don't want to be disturbed.

This profile is used when you are temporarily unavailable to take calls, for example when you are in a meeting.

Divert all calls to voicemail (if configured)

☐ But forward calls from these numbers

To

☐ Notify me of new voicemails via email

15.1.4 Unavailable

Use this profile when you are away for an extended period of time and not available to take calls, for example when on vacation.

This profile is used outside of business hours or when you are on vacation or holiday.

Divert all calls to voicemail (if configured)

☐ But forward calls from these numbers

[Delete](#) [Add](#)

To

When a call is sent to voicemail

☐ use "unavailable" greeting

☒ use "no answer" greeting

15.2 Do Not Disturb

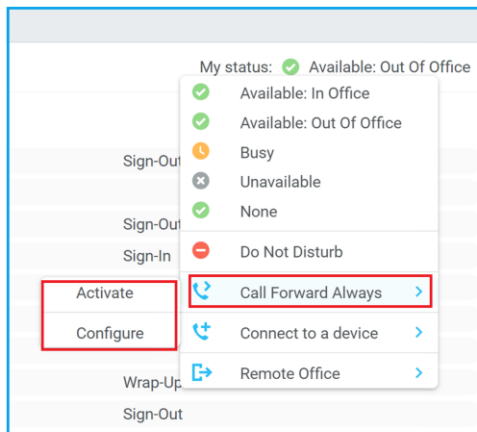
To activate Do Not Disturb, click on the My Status link and click the menu option. The My Status link will change to indicate the service activation, as will the Unity title bar.

My status: Available: Out Of Office

- Available: In Office
- Available: Out Of Office
- Busy
- Unavailable
- None
- Do Not Disturb
- Call Forward Always >
- Connect to a device >
- Remote Office >

Anyone monitoring the user [in the Contacts list] will also see that they currently have Do Not Disturb activated.

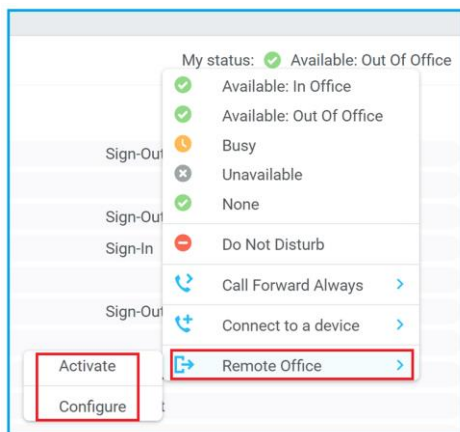
15.3 Call Forward Always



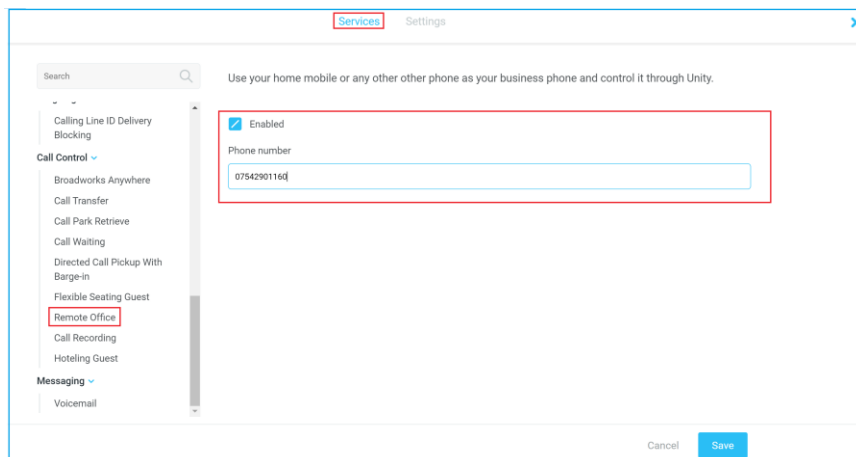
Use the My Status link to quickly activate/deactivate the service, or click configure to go directly to that service in Settings

15.4 Remote Office

Use the My Status link to quickly activate/deactivate the service, or click configure to go directly to that service in Settings.

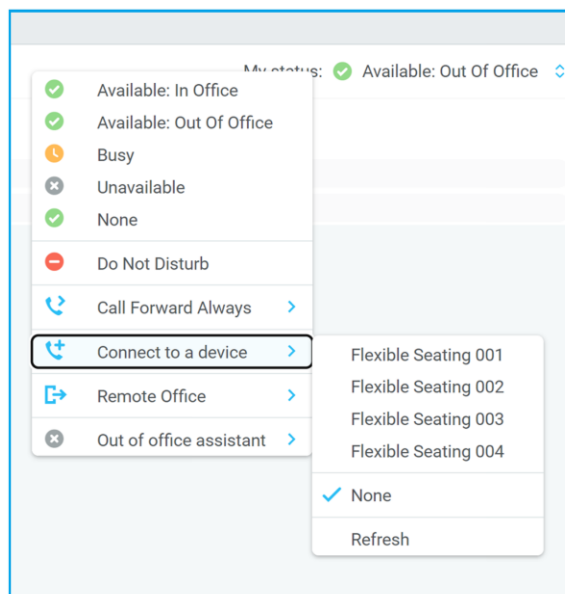


Unity can also be configured to automatically activate and deactivate Remote Office on start-up and shutdown. If Unity is not configured to automatically deactivate when closing a prompt will be presented to the user, as shown below.



15.5 Hot-Desk and Flexible seating

Hoteling Guest allows the user to connect to a device, typically in a hot-desk and flexible seating environment. To attach the user account to a device, select the device from the menu option below. Please note that only available devices [that aren't already in use] will be displayed.



There is no visual notification that the user account is attached to a device, other than if the user clicks in the My Status link, in which case they will see the device is ticked.

My status: Available: Out Of Office

Available: In Office

Available: Out Of Office

Busy

Unavailable

None

Do Not Disturb

Call Forward Always >

Connect to a device >

Remote Office >

Out of office assistant >

Flexible Seating 001

Flexible Seating 002

Flexible Seating 003

Flexible Seating 004

None

Refresh