

# Unity Call Center Agent

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## USER GUIDE

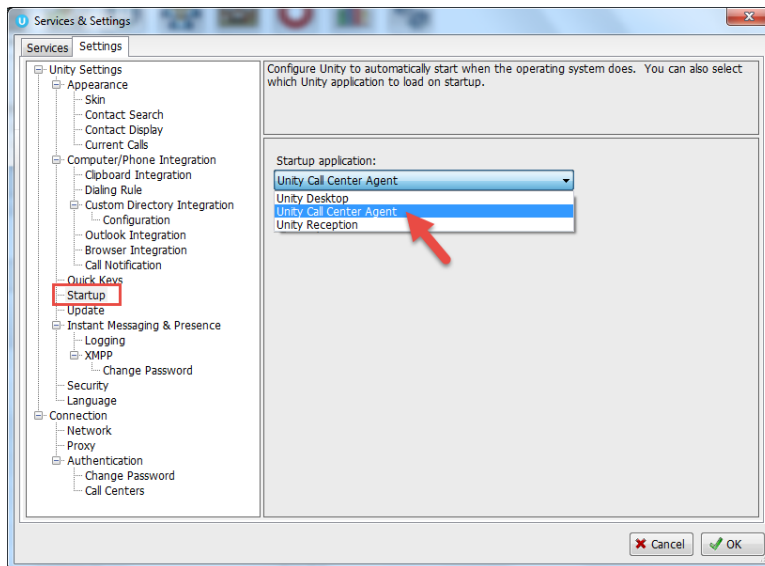
## System Requirements

### Windows PC Requirements

- Unity will require approximately 100MB of hard drive space on the local machine
- By default the install directory is C:\Program Files\Unity Client
- Minimum computer spec: CPU: single core 3Ghz. Ram: 4GB. Video Card: 256MB onboard RAM
- Unity is only supported on Windows XP [SP3], Windows 7 [32 and 64-bit versions] and Windows8 [32 and 64-bit versions]. There are no special permissions required to install Unity on Windows 7 or Windows 8
- Uses version 4.5 of the .NET Framework

## Selecting Unity Start-up Version

All Unity products are included within the same install file. Choose the Unity version in Settings [button] > Settings [tab] > Start-up – choose option from drop list as below



### Configuration Options

1. **Instant Message Log:** By default, instant messages are saved to the Instant Message Log folder at C:\Program Files (x86)\Unity Client\Instant Message Log. This can be changed in Settings to be any location, for example to a network share on a server.
2. **Citrix/Thin Client Support:** Unity is supported for use in a Citrix/Terminal Services environment
3. **Proxy Settings:** Unity can be configured for use behind an HTTP proxy server in Settings [Button] > Settings [tab] > Proxy
4. **Locking Unity Settings** – Unity settings can be locked so the user cannot change them, such as for a call center environment where the Agent’s ability to change settings needs to be restricted. Examples of this include authentication details, startup application, startup/post-call ACD state, or the frequency to refresh call center statistics.

## Unity – Supported Functionality

### Telephony Features [Available in Unity Agent]:

1. **Call Control** - Answer/Release/Transfer/Conference
2. **Instant Messaging** – IM available to any other user in the Group that is also running Unity
3. **Service Configuration** – Allows the User to change their assigned services such as Call Forward and Remote Office
4. **Busy Lamp Field** - Engaged/free/ringing extension status of monitored users
5. **Engaged User Monitoring** – Hovering the mouse over an engaged [red icon] user will show the name or number of the other party and the current call duration, when viewing the list in Icon View. When viewing in List View, this information is available in the Status column. For privacy, this can optionally be disabled.
6. **Active Call Window** - Graphical display of all active calls showing incoming CallerID or name, dialed party and duration. For calls placed on Hold, the Hold duration is shown
7. **Audible Alarms** – Users can specify a wav file to be played when another user’s extension is ringing to facilitate Manager/Secretary interworking, where the Secretary screens the Managers calls
8. **Configurable Keyboard Shortcuts** - Quick Keys: for example, to make F1 perform Answer/Release or CTRL + S to transfer the call to Sales
9. **Call Logs** - Missed, Received and Dialed calls – *note: These are User calls not ACD calls*
10. **Directories** - Centralized Group, Outlook and Personal entries
11. **Web Pop URL** - Ability to append incoming CallerID to a URL for interpretation and screen pop by web based application
12. **Database Integration** - Ability to integrate with third party SQL and LDAP directories, including Active Directory.
13. **Auto Update** – Unity will auto-update to any new release once it becomes available.

### Agent Features [In addition to Telephony features above]

1. **Join/Leave Queue** – Right-click a queue to Join or Leave. The corresponding queue icon changes color from green to red.
2. **Change ACD State** – Available, Unavailable and Wrap-up ACD states are clickable buttons
3. **Call Center Name Presentation** - The name of the call center queue is displayed in the “To” field in the Active Call Window
4. **Unavailable Codes** - As configured in Evolve IP Call Center. *Requires Evolve IP Call Center Agent Premium user service assigned*
5. **Supervisor Escalation** - Alerting Supervisors who are assigned to the queue by call or IM
6. **Personal Wallboard** - Displays the Agents, personal and overall statistics for queues the Agent is a member of. Statistics include Total Calls, Answered Calls, Missed Calls, Calls In Queue
7. **DNIS** - Allows Unity to change outbound CLI presentation. *Requires Evolve IP Call Center Agent Premium user service assigned*
8. **ACD Behavior** – Configure required ACD state [between Available, Unavailable and Wrap-Up] at start-up, post call and when the workstation is locked
9. **Configure Wrap-Up** – In Unity Settings, the Agent can specify an automatic post call Wrap-Up duration
10. **Disposition Codes** - As configured in Evolve IP Call Center. *Requires Evolve IP Call Center Agent - Premium*
11. **Personal Reporting** - Provides historical reports of the Agents own performance metrics. *Requires Evolve IP Enhanced Reporting to be deployed*

### Unity Initial Set-Up

On installation Unity will prompt for the Evolve IP Username and Password. Other details [covered below] should be pre-populated. Call Center authentication details also need to be added for Unity Agent as addressed below.

Authentication Credentials Location:

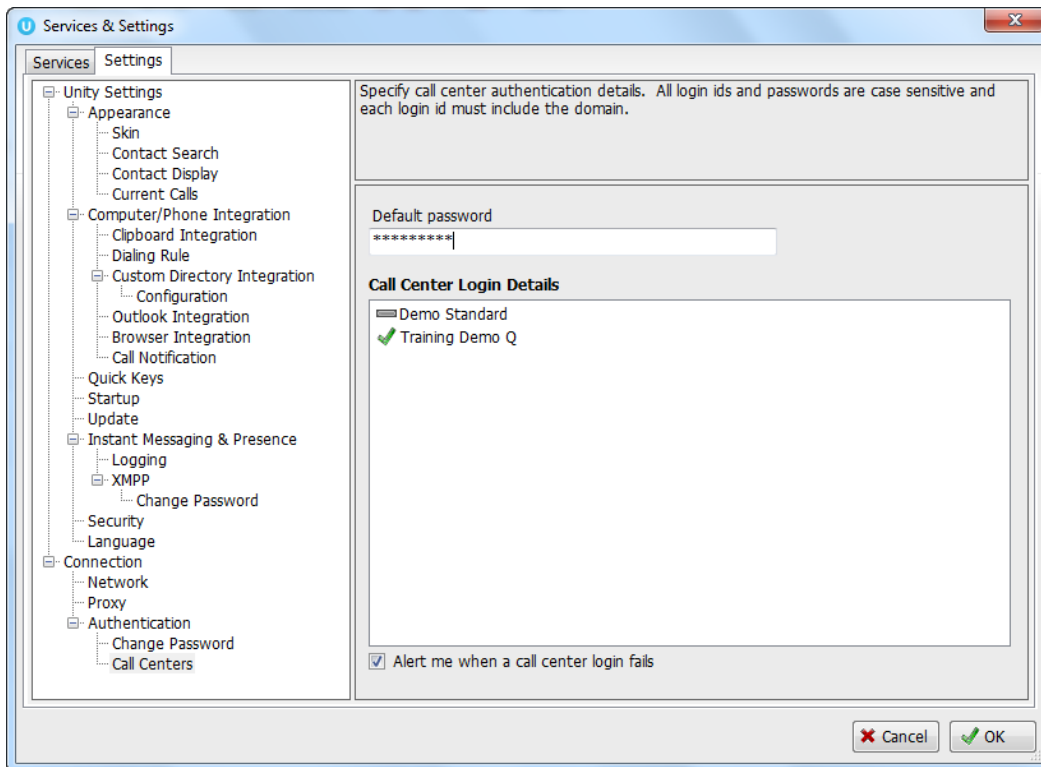
Server Address: Settings [button] > Settings [tab] > Network  
 User and Call Center ID: Settings [button] > Settings [tab] > Authentication  
 Unity Product: Settings [button] > Settings [tab] > Start-Up – select from drop list

### Required Authentication Credentials by Unity Variant

Unity Version	Required Authentication Details	Notes
Desktop Agent	<u>BroadWorks Server Connection Details</u> Server Address: <i>voip.evolveip.net</i> Server Port: 2208	The server address and port should be pre-populated.
Desktop Agent	<u>Unity Server Connection Details</u> Server Address: <i>im.unityclient.com</i> Server Port: 2208	These settings will be pre-populated
Desktop Agent	<u>BroadWorks Login Details</u> Username: <i>username</i> Password: <i>userpassword</i>	Your Username and Password will be provided by your Project Manager
Agent	<u>Call Centers:</u> Login ID: <i>callcentername</i> Password: <i>callcenterpassword</i>	<ol style="list-style-type: none"> <li>This is the Call Center ID and call center Password from Evolve IP.</li> <li>When using Unity Agent, the Call Center IDs are pre-populated. Double click the Call Center ID to enter the password.</li> </ol> <p>Note* See below on how to apply passwords to Call Center Queues</p>

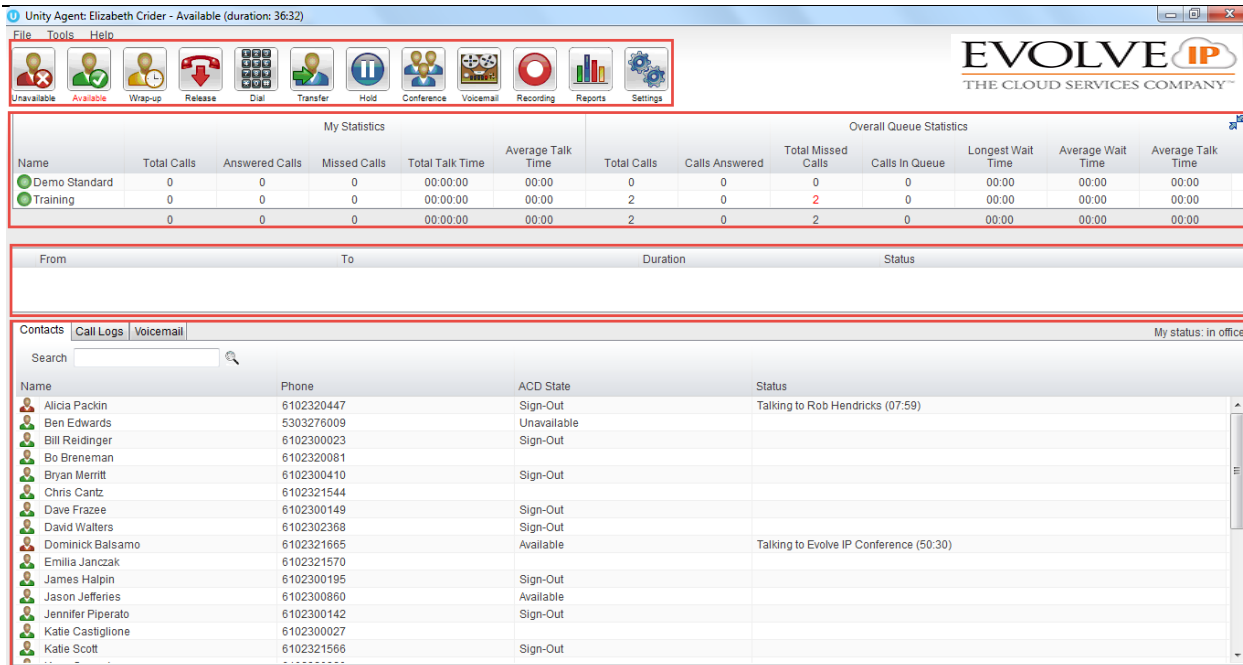
### Unity Agent– Entering Call Center IDs

Unity will populate the Call Center queues that the Agent is assigned to. Settings [button] > Settings [tab] > Authentication > Call Center > Ensure that all passwords are the same for each Call Center in your organization. Under Default Password enter in the password for the Call Center queues they agent is assigned to. Then click the green OK check to save



# Unity Agent User Guide

## Introduction to Main Interface



The main Unity window has four separate sections: Call Control/CallCenter Icons, Personal Wallboard, Active Call Window, and User Status/Directories View.

**Top Box - Call Control/Call Center Icons:** This view provides the different call control icons needed to perform actions like Answering/Releasing a Call, Transferring and Conferencing calls. The Call Center Status Icons allow Agents to switch between Unavailable, Available and Wrap-up by clicking on the appropriate icon.

**Top Middle Box - Personal Wallboard:** Shows the current performance metrics for the Calls Centers an Agent is assigned to.

**Bottom Middle Box – Active Call Window:** All inbound and outbound calls will appear in this section. The following information will always be displayed: From (caller-id), To (caller-id), Duration of Call, and Call Status (Active, held, etc).

*\*Note that Gridline view can be turned off: Right-click in Active Call Window > Click Show Gridlines so it is unchecked and turned off.*

**Bottom Box – User Status/Directories:** User Status shows the users currently being monitored. Directories provides the Enterprise/Group Directories along with a Personal directory for the end user’s personal entries.

*\*Note that Gridline view can be turned off: Right-click in User Status Window > Appearance > Click Show Gridlines so it is unchecked and turned off.*

### 1. Using Personal Wallboard

The Personal Wallboard will show current performance metrics for the Call Centers the Agent is assigned to. Statistics are broken down by “My Statistics” which show the Agents individual performance and “Overall Queue Statistics” which shows the current conditions across the entire call center(s). All statistics will poll Evolve IP on a configurable timer. The red/green +/- 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	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Demo Standard	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
Training	0	0	0	00:00:00	00:00	2	0	2	0	00:00	00:00	00:00
	0	0	0	00:00:00	00:00	2	0	2	0	00:00	00:00	00:00

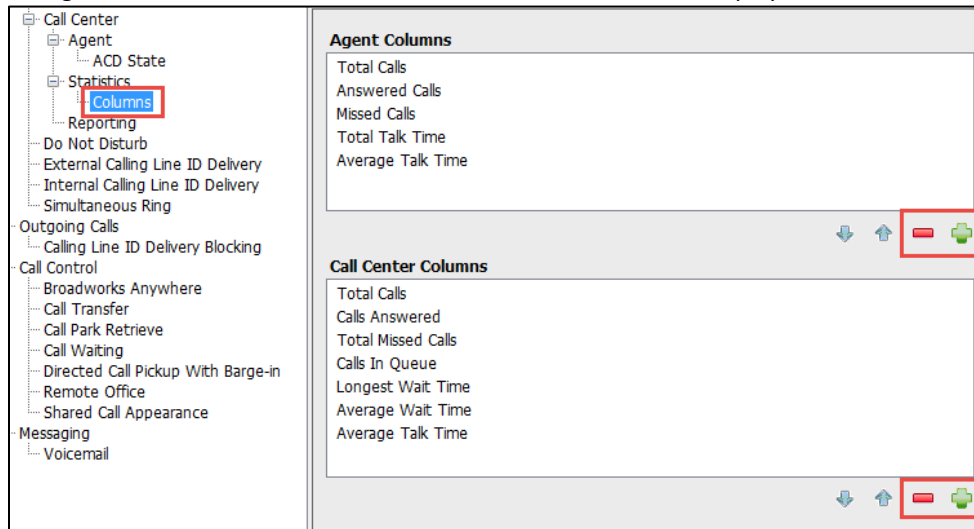
#### Minimized View

My Statistics						Overall Queue Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average 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	2	0	2	0	00:00	00:00	00:00

*Note that:* Statistics shown in Personal Wallboard reset every 24 hours at midnight

Agents have the ability to change the statistics displayed in their Personal Wallboard.

Changing the different Wallboard statistics can be found in Settings[button] > Settings [tab] > Statistics > Columns. Changes can be made to “My Statistics” and the “Overall Queue Statistics.” Selecting the “Plus/Add” icon will take the agent to a new view to all the available statistics that can be displayed.



Below are the available statistics to be displayed:

My Statistics	Overall Queue Statistics
Total Calls	Total Calls
Answered Calls	Calls Answered
Missed Calls	Total Missed Calls
Total Talk Time	Calls in Queue
Average Talk Time	Longest Wait Time
Total Staffed Time	Average Talk Time
	Average Hold Time
	Total Missed Calls Percentage
	Number of Busy Overflows
	Number of Busy Overflows Percentage

	Number of Calls Answered Percentage Number of Calls Abandoned Number of Calls Abandoned Percentage Number of Calls Transferred Number of Calls Transferred Percentage Number of Calls Timed Out Number of Calls Timed Out Percentage Average Number of Agents Talking Average Number of Agents Staffed Average Abandonment Time Total Talk Time Staff Ratio
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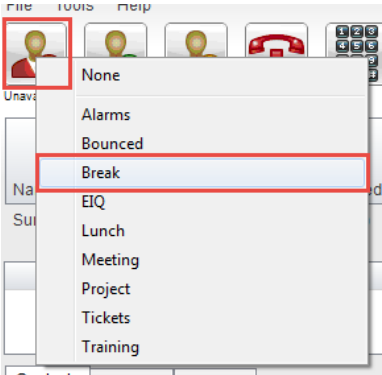
**1.1 Changing ACD State**

Clicking Unavailable, Available or Wrap-Up will change availability for all queues the user is a member of.



**1.2 Using Unavailable Codes**

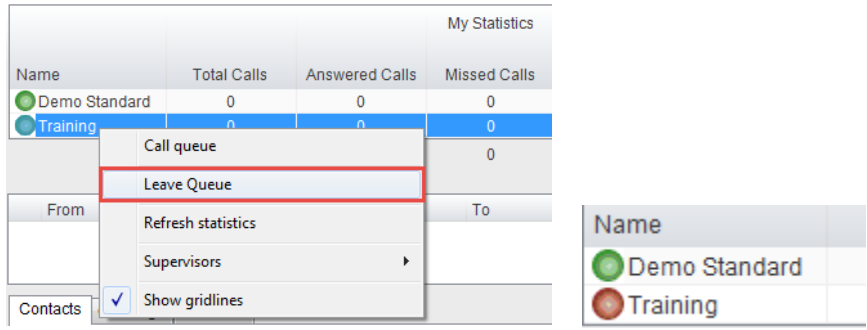
When clicking Unavailable, any Unavailable codes that are setup in Evolve IP OSSmosis are presented in a drop list. Select the appropriate code.



**1.3 Joining & Leaving Queues**

Right-click any queue in the Personal Wallboard to toggle between Join and Leave queue. Queues that the user is Joined to have a green icon next to them. A red icon indicates the user is not Joined to that queue.

*\*Note that based on your Administrations requirements this option may not be available.*



### 1.4 Receiving ACD Calls

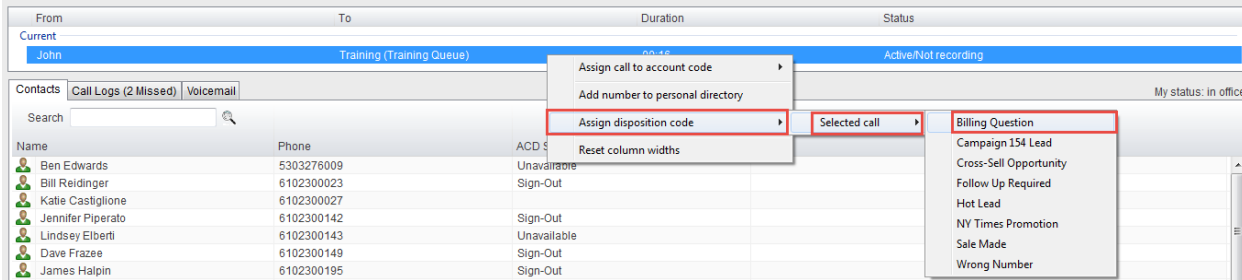
Inbound ACD calls will display the Call Center name, in the “To” field. The “From” field will display the incoming CallerID (if not withheld) or th Caller name if it can be matched from the Directory. Answer the call by lifting the phone handset or clicking Answer/Release call control button.

From	To	Duration	Status
Current			
John	Training (Training Queue)	00:00	Ringing

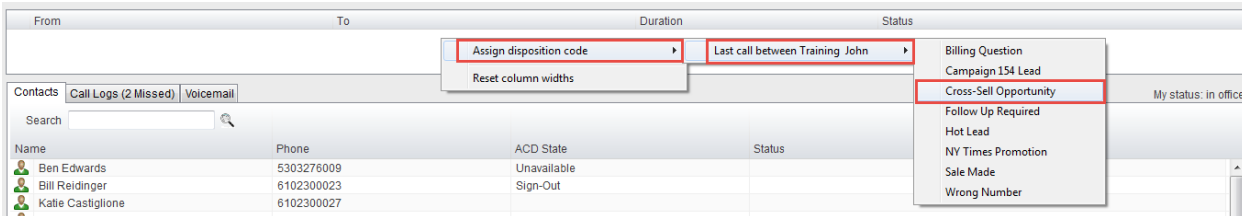
### 1.5 Using Disposition Codes

Unity will expose Disposition Codes, as configured in Evolve IP OSSmosis, within the Active Call Window. The Agent can enter one or more Disposition Codes by right-clicking the active call and selecting from the drop-down list. Disposition Codes can be entered while the call is active, or immediately after, the call has ended and before another call is answered. Only Disposition Codes configured for the queue that the Agent has answered are displayed.

#### Adding Disposition Codes While Call is Active



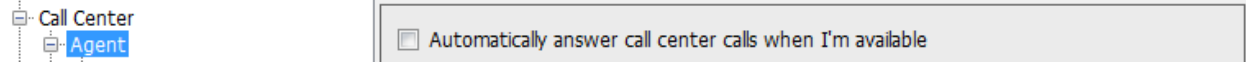
#### Adding Disposition Codes Post Call





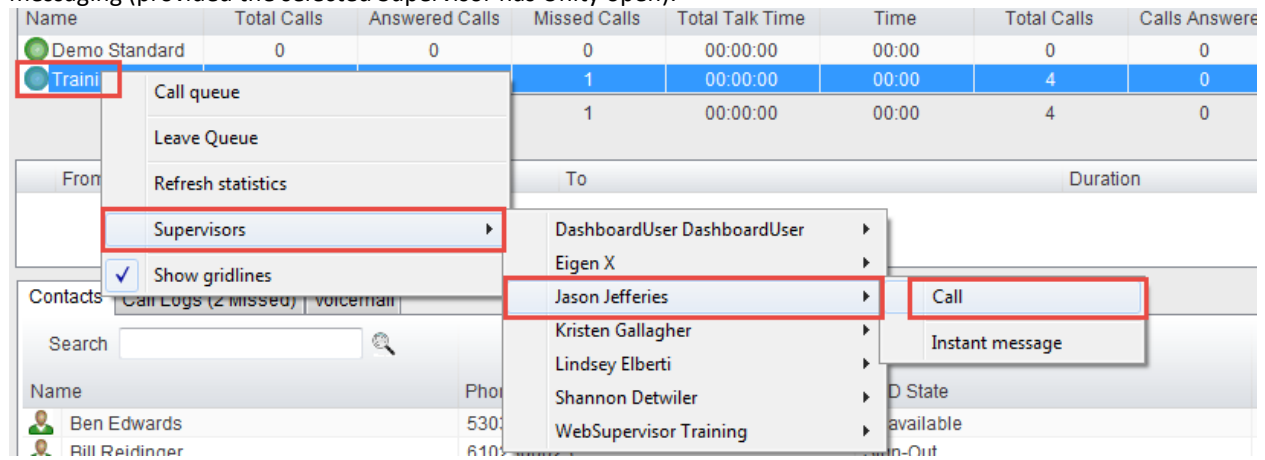
### 1.6 Auto Answer

Unity Agent allows ACD calls to auto-answer when the Agent is in the “Available” state so that an Agent does not have to lift the handset or activate a call control button. This is toggled on/off in Settings [button] > Service > Agent



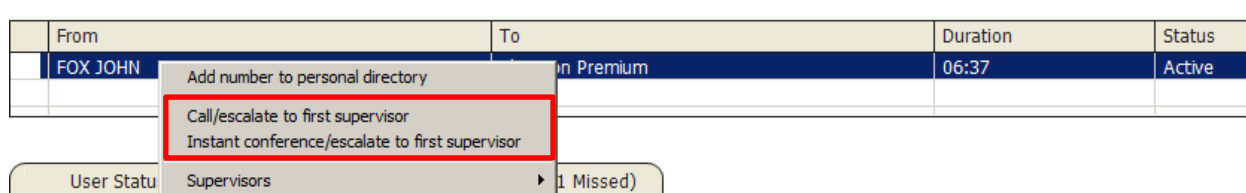
### 1.7 Alerting Supervisors

Right-click a Call Center queue in the Personal Wallboard and select “Supervisors” (this is available for all queues). This will display a list of Supervisors assigned to the queue in Evolve IP’s OSSmosis portal. Agents can alert the selected Supervisor by calling them (if there is a current call in progress, this will put that call on Hold), or instant messaging (provided the selected Supervisor has Unity open).



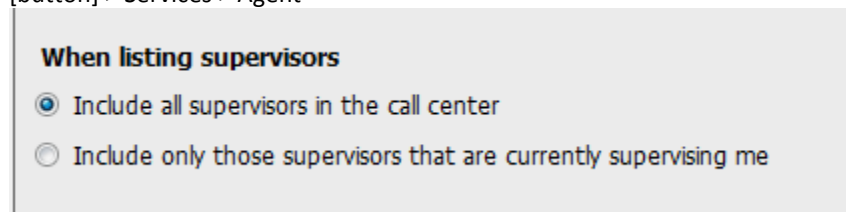
### 1.8 Escalating Call Center Call to first available Supervisor

This allows you to escalate a call to the first available supervisor instead of needing to choose which supervisor you wish to escalate the call to. Right-click on the active call and select “Call/escalate to first supervisor” or “Instant conference/escalate to first supervisor” depending on if you wish to speak with the supervisor first or immediately conference them in.



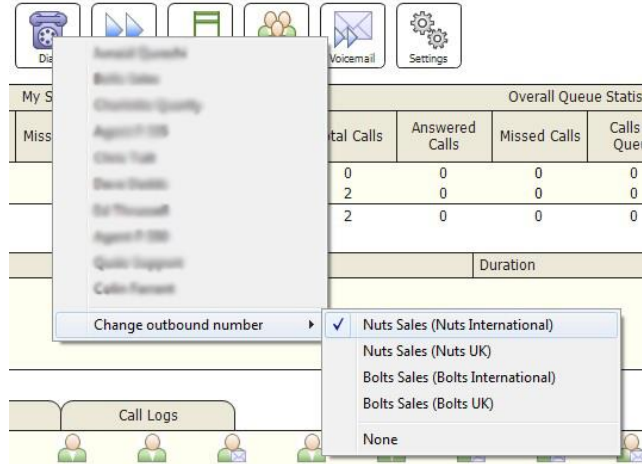
### 1.9 Configuring Supervisor List

There are two Supervisor display options; All Supervisors in the Call Center or only those Supervisors who are currently supervising the Agent [as configured in Evolve IP’s OSSmosis]. This option is controlled in Settings [button] > Services > Agent



### 1.10 Activating Outbound DNIS

If the Agent is a member of Evolve IP Call Center premium queues, and the DNIS capability has been configured in Evolve IP, then the Agent can select an outbound DNIS which will determine which outbound CallerID is presented when the Agent makes 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 checked. This will affect all outbound calls until the outbound DNIS setting is changed, or set to none.

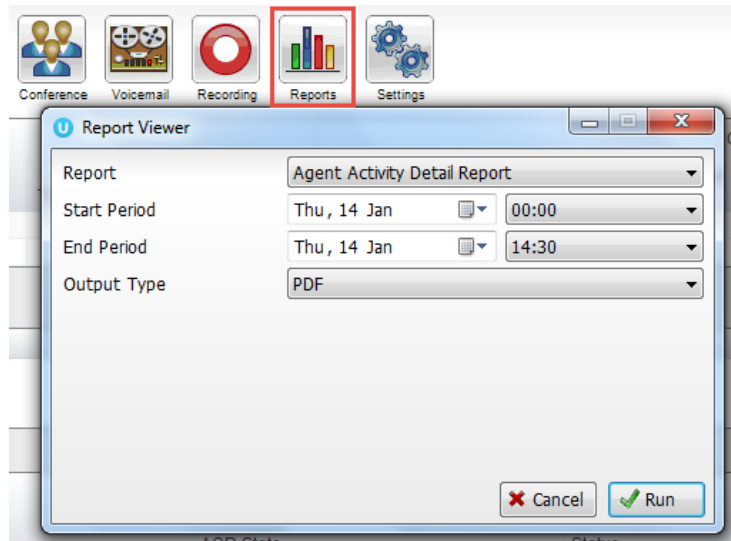


### 1.11 Running Agent Personal Reports

Unity Agent provides access to the following reports:

1. Agent Activity Detail Report
2. Agent Activity Report
3. Agent Call Detail Report
4. Agent Call Report
5. Agent Duration Report
6. Agent Sign-In/Sign-Out Report

To access these reports, click on the Reports Icon. From the Report Viewer interface (shown below) select the desired report and reporting period.



### 1.12 Customizing Unity Queue Availability and Behavior

Unity Agent offers a cascading heirarchy of availability settings and Behavior that can be configured. This allows for Unity to start on Windows boot, automatically Join the Agent to their assigned queues, make them immediately Available and auto-answer ACD calls – or any variation within that chain.

Options are:

Action	Behavior Configuration Options	Configuration Location	Example
<b>OS Boot</b>	Auto-start Unity [select as Desktop, Agent]. Optionally Unity can start minimized to the taskbar	Settings [button] > Settings [tab] > Startup – select type from drop list	Fig 1
<b>Unity Open/Close</b>	Allows the user to specify Join Queue on Unity Start and Computer Unlocked, and Leave Queue when Unity Closed or Computer Locked	Settings [button] > Settings [tab] > Startup – select type from drop list	Fig 2
<b>Unity Close</b>	Activate Sign Out when Unity is closed	Settings [button] > Settings [tab] > Services > Call Center > Agent > ACD State	Fig 3
<b>Start-Up and Desktop Locked</b>	Preset Available, Unavailable or Wrap-Up ACD state [Unavailable codes are supported if configured in Evolve IP's OSSmosis portal]	Settings [button] > Settings [tab] > Services > Call Center > Agent > ACD State	Fig 4 and Fig 4.1
<b>Post ACD Call State</b>			
<b>Desktop Locked ACD State</b>			
<b>Wrap-Up Duration</b>	Allows the Agent to specify Wrap-Up [in seconds] that will apply post ACD call. The Agent state will change to Wrap-Up before returning to Available at the duration of the timer. Note a maximum Wrap Up timer can be set in Evolve IP's OSSmosis portal that overrides the Unity setting.		Fig 5
<b>Prevent Changing ACD State on ACD Call</b>	Prevents the Agent from changing state when they are currently on an ACD call		Fig 6
<b>Auto Answer ACD Call</b>	Toggle Auto Answer on/of, typically used in conjunction with a headset	Settings [button] > Settings [tab] > Services > Call Center > Agent	Fig 7
<b>Specify Supervisor List [when Right-clicking call center queue in Personal Wallboard]</b>	Determines which Supervisors are displayed, those assigned to the call center in Evolve IP or only those that are monitoring the Agent		Fig 8

*Note: These settings can be restricted to require Administrator rights to the local workstation in order to prevent Agents unnecessarily changing Behavior.*

Fig 1 – Auto start Unity on operating system boot

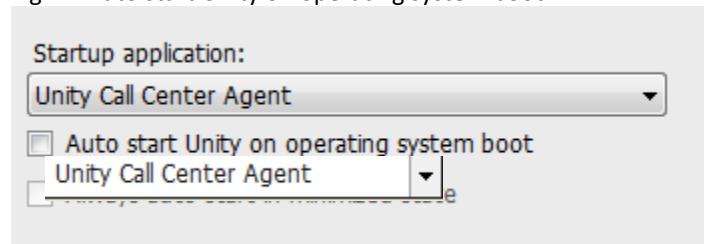


Fig 2 - Join/Leave Call Centers on Unity Start

**Join all my call centers:**

- when Unity is starting
- when the computer is unlocked

**Leave all my call centers:**

- when Unity is closing
- when the computer is locked

Fig 3 - Activate Sign Out when Unity is Closed

Activate sign-out ACD state when Unity is closing.

### 1.13 Configuring ACD State with Desktop

Unity Agent can be pre-set with an ACD state for Desktop Startup and Unlock, Post Call and Desktop Locked. In the below example, the Agent ACD Behavior is set to "Available" at all times. This is configured in Settings [button] > Services > Call Center > Agent > ACD State

Fig 4 – Configuring ACD State

Startup & desktop unlocked ACD state  
Available

Post call ACD state  
Wrap-Up

Desktop locked ACD state  
Not Set

Wrap-up duration (sec)  
60

- Don't change my ACD state to Available until I assign a disposition code
- Prevent me from manually changing my ACD state when on a call center call.
- Only show the current ACD state button

Fig 4.1 – Configuring ACD State showing Unavailable Codes

Startup & desktop unlocked ACD state  
Available

Post call ACD state  
Wrap-Up

- Available
- Unavailable
- Unavailable - Alarms
- Unavailable - Bounced
- Unavailable - Break
- Unavailable - EIQ
- Unavailable - Lunch
- Unavailable - Meeting
- Unavailable - Project
- Unavailable - Tickets
- Unavailable - Training
- Wrap-Up
- Not Set

Activate sign-out ACD state when Unity is closing.

Fig 5 Wrap-Up Duration

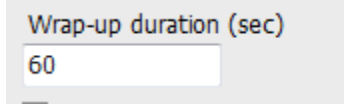


Fig 6 Prevent Changing ACD State to Available until a Disposition Code has been assigned to the last Queued call

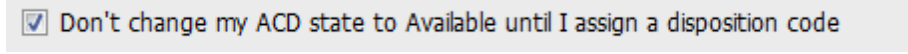


Fig 7 Prevent Changing ACD State While on a Call

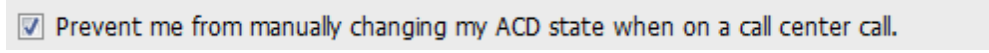


Fig 8 Auto Answer ACD Call

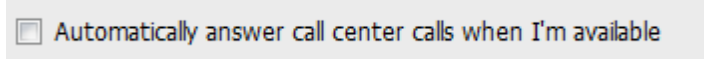
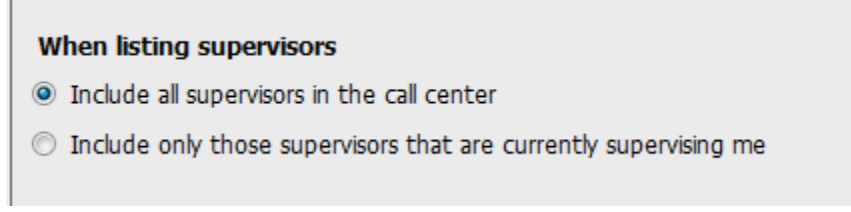
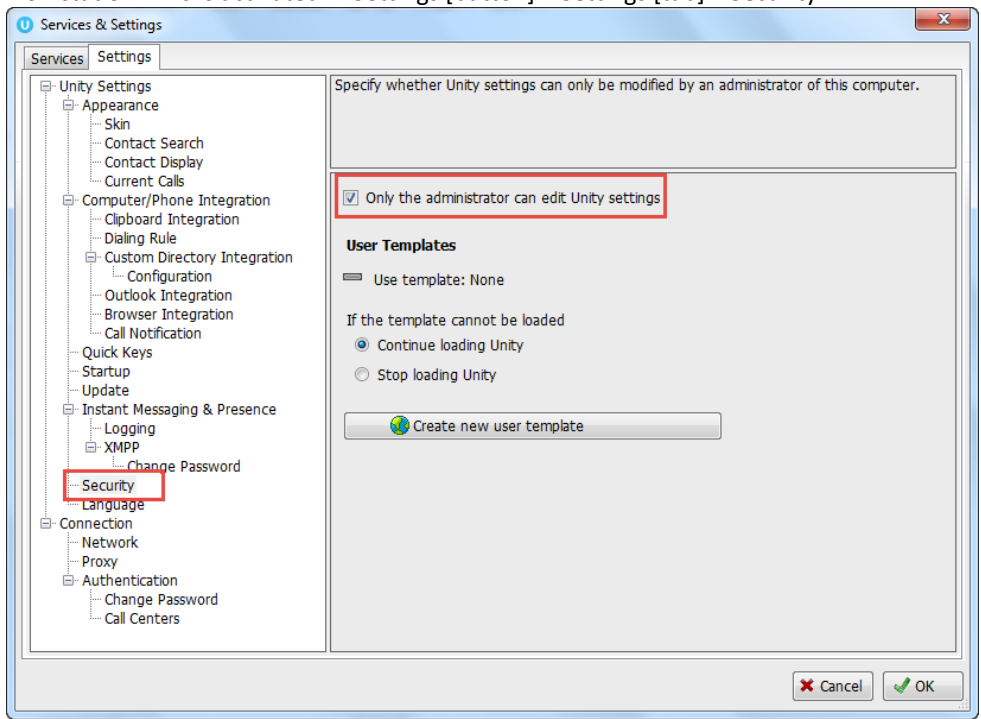


Fig 9 – Specify Supervisor List



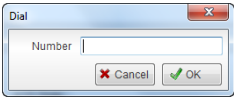
### 1.14 Locking Unity Settings

Unity settings can be locked so that they can only be changed by a user with Administrator rights to the local workstation. This is activated in Settings [button] > Settings [tab] > Security



### 1. Call Control Capabilities

#### 1.1 Making a Call



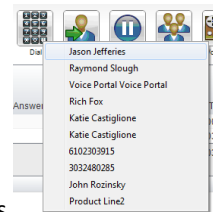
- 1) Click to Dial Button to bring up the Make a Call dialog box
- 2) Enter the number of the party you wish to reach and click the green check to make the call.

#### 1.2 End a Call



- 1) Click the Release icon to end a call. If there is more than once call in progress, first click in the Active Call Window and then click Release.

#### 1.3 Redial



- 1) Right-click the Dial icon to see a list of your last dialed numbers . Click a number to redial.

#### 1.4 Answering a Call



- 1) When Unity displays an inbound call, click the Answer icon or double-click the call in the Active Call Window, to answer the call.
- 2) If there is an active call in progress, click the new inbound call in the Active Call Window before clicking Answer. This will automatically place the first call on Hold.

#### 1.5 Placing a Call On Hold



- 1) To place an active call on Hold, press the Hold icon . The Call status will change to On Hold in the Active Call Window and there will be an On Hold icon alongside the call.

From	To	Duration	Status
Waiting			
FOX JOHN	Elizabeth Crider	00:58	On hold

#### 1.6 Retrieving a Held Call

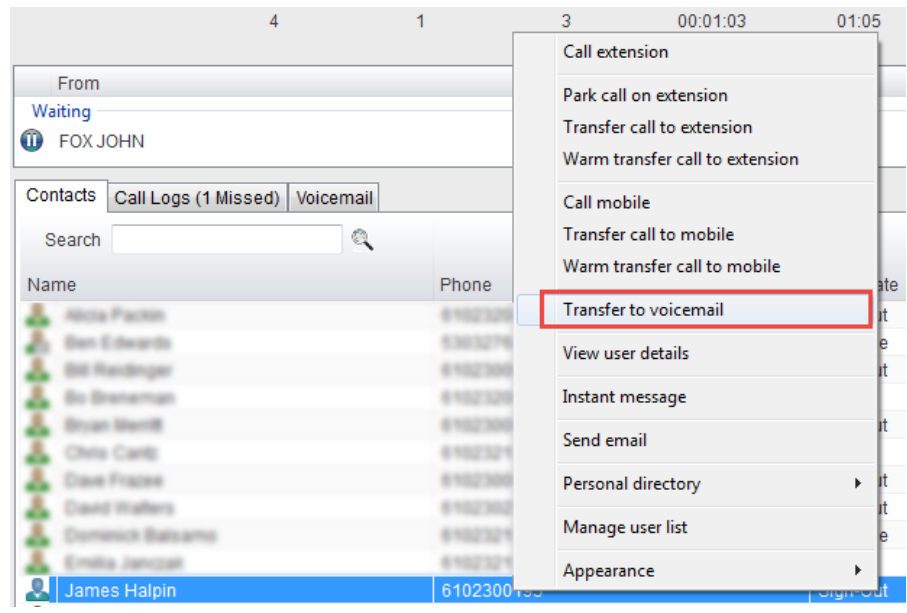



- 1) Click the held call in the Active Call Window to select it. Click the Retrieve button to take the call of hold.

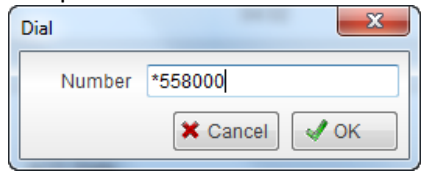
#### 1.7 Transferring a Call

##### 1.7.1 Voicemail Transfer

- 1) When on an active call, right click on a user within the User Status list and select Transfer to voicemail.

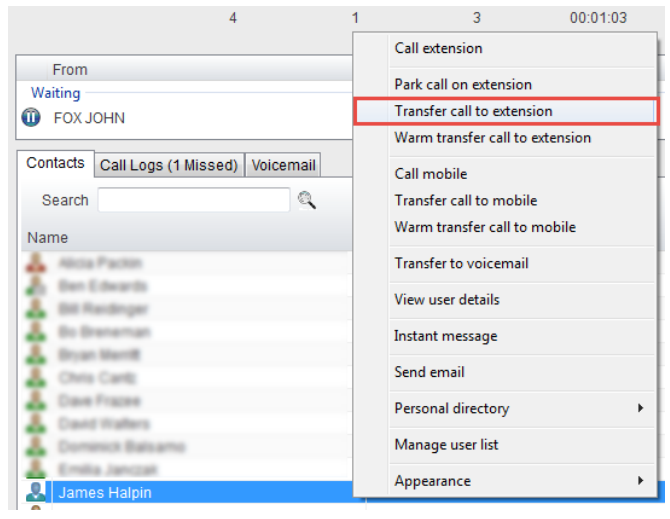


- 2) When on an active call, click the Dial icon  to bring up the Make a Call dialog box. Enter in \*55 followed by the end user's extension and click the green check to complete the Voicemail transfer.



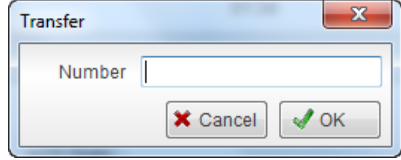
**1.7.2 Blind Transfer**

- 1) When on an active call right-click the recipient in either the User Status or Directory tab and select Transfer Call to Extension or Transfer Call to Mobile. This will send the call directly to the destination number.





- 2) To Blind Transfer the call to a number not within your User Status or Directory Tab, select the call from the Active Call Window and click the Transfer Icon. This will bring up the

Transfer Call dialogue box. Enter the destination number and click the green check or press Enter.




1.7.3 Consulted Transfer


Option 1:

- 1) Receive and answer an inbound call. Make a new call to the desired destination extension, either by clicking the Dial icon  , double clicking an Available colleague  in the User Status tab or double-click a Group or Personal directory entry.
- 2) This will automatically place the first call on Hold and initiate a new call in the Active Call Window.

From	To	Duration	Status
<b>Current</b>			
Elizabeth Crider	Katie Castiglione	01:29	Active/Not recording
<b>Waiting</b>			
FOX JOHN	Elizabeth Crider	05:13	On hold

- 3) Once the called party answers, click the Transfer icon  to connect the call. Both calls will disappear from the Active Call Window
- 4) If you have multiple active calls, make sure you first select the call you wish to transfer by clicking on it in the active call window.

Option 2:

- 1) Receive and answer an inbound call.
- 2) Right-click on an available colleague  in the Contacts tab.
- 3) Select Warm Transfer to Extension

The screenshot shows the 'Waiting' call log with 'FOX JOHN' and 'Elizabeth Crider'. Below it is the 'Contacts' tab with a search bar and a list of contacts. A context menu is open over 'Jason Jefferies', with 'Warm transfer call to extension' highlighted in a red box. Other menu items include 'Call extension', 'Park call on extension', 'Transfer call to extension', 'Call mobile', 'Transfer call to mobile', 'Warm transfer call to mobile', 'Transfer to voicemail', 'View user details', 'Instant message', 'Send email', 'Personal directory', 'Manage user list', and 'Appearance'.



- 4) Once connected and you are ready to complete the transfer select the transfer icon



**1.7.4 Transfer Call to Personal Voicemail**

- 1) To send an inbound caller directly to your Voicemail click Send to Voicemail icon:



**1.8 Setting up a Conference Call**

- 1) Once an active call is established, either made or received, call a third person by clicking the Dial icon



or double-click a user in the User Status or Directory Tab.

- 2) Making this call will automatically place the first caller on Hold.

- 3) Once the third party has answered click the Conference icon and all three parties are active on the conference call. The other parties on the conference call are displayed in the Active Call Window with Status as "Active (Conference)".



From	To	Duration	Status
<b>Current</b>			
Elizabeth Crider	Jason Jefferies	00:10	Active (conference)Not recording
FOX JOHN	Elizabeth Crider	00:29	Active (conference)Not recording

- 4) To put the conference call on hold click the hold icon and retrieve icon to talk the call off hold.



- 5) To end the conference call click the Release icon to disconnect all parties from the conference call.

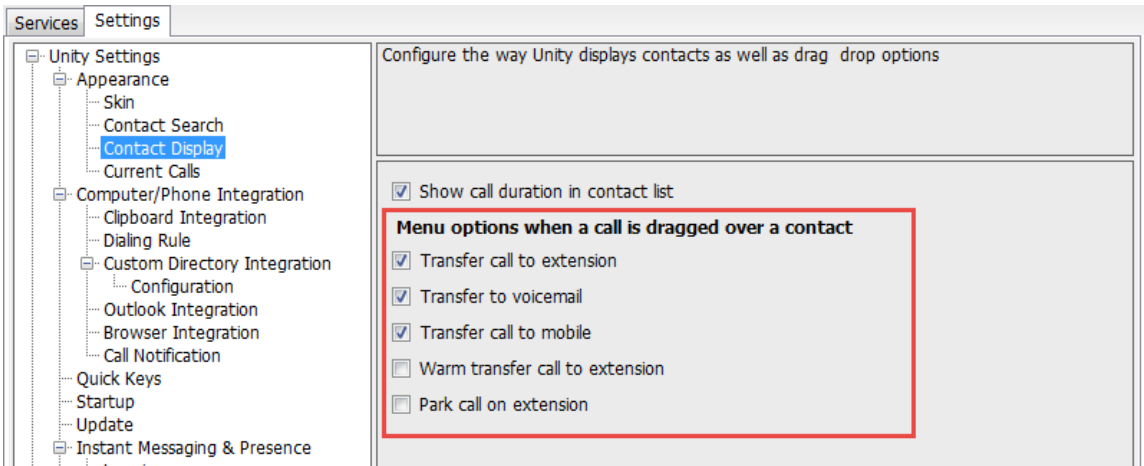
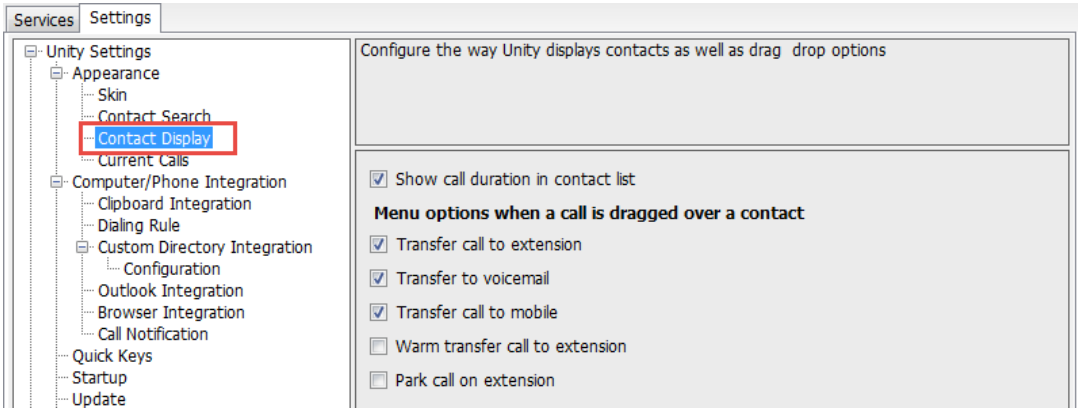


**1.9 Drag and Drop Calls**

Within the Unity Agent client is the ability to drag and drop an active call over a monitored contact within the contact tab. Once a call has been dragged over a contact (depending on your settings) there will be multiple action options.

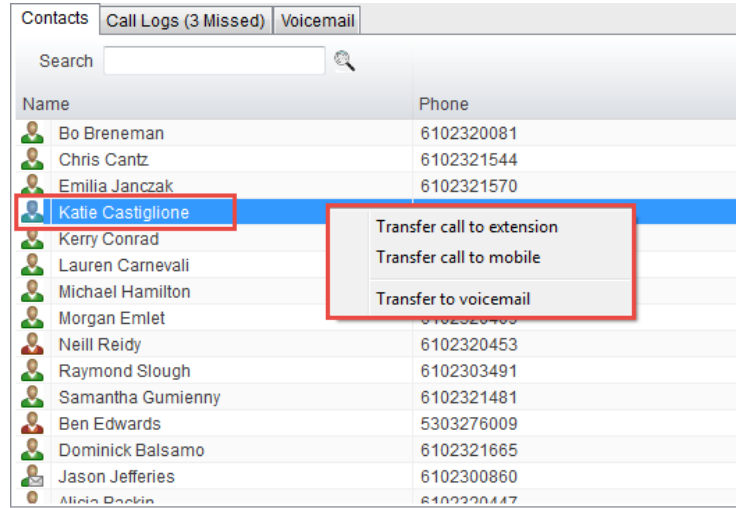
**1.9.1 Setting Up Drag and Drop**

- 1) Select Settings [button] > Settings [tab] > Contact Display
- 2) Select the options presented: Transfer call to extension, Transfer to voicemail, Transfer to mobile, Warm transfer call to extension, and Park Call on extension



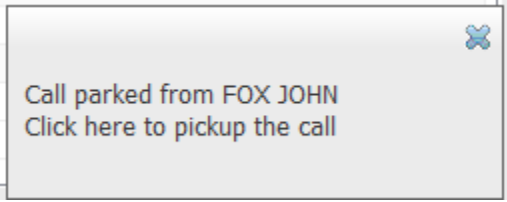
1.9.2 Drag and Drop Calls

- 1) Click and hold the mouse on the call and drag and drop the call over the user in the contact list.
- 2) Once the call has been dropped on the contact select the call action to take.



**1.10 Retrieving a Parked Call**

- 1) A parked call is retrieved in one of two ways:
  - a. Click the pop-up window indicating a call has been parked.



- b. Click the Pickup Call Icon appears when a call has been parked.



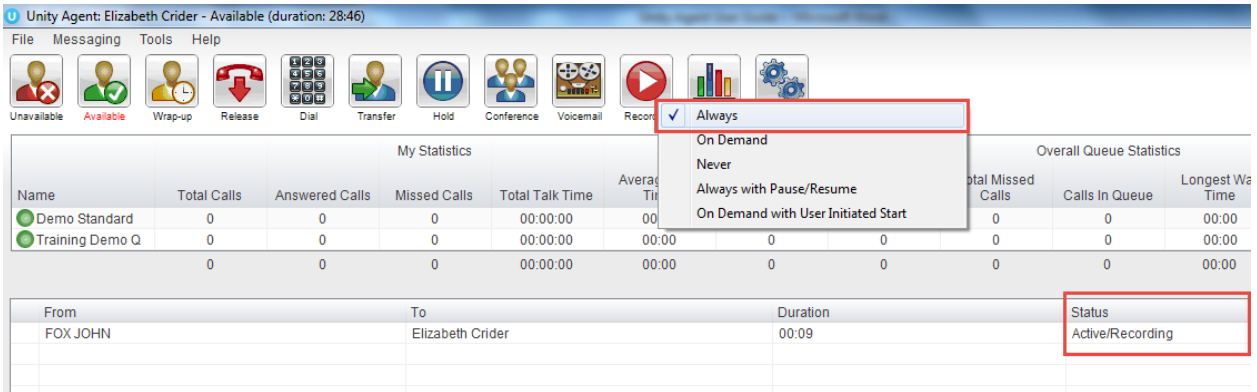
## 2 Call Recording

Call recording profiles for Agents will be set in EvolveIP OSSmosis by the Supervisor or Administrator. An Agent is not able to change call recording settings through the Unity client.

### 2.1 Always

The Always Call Recording setting will always record all end users calls.

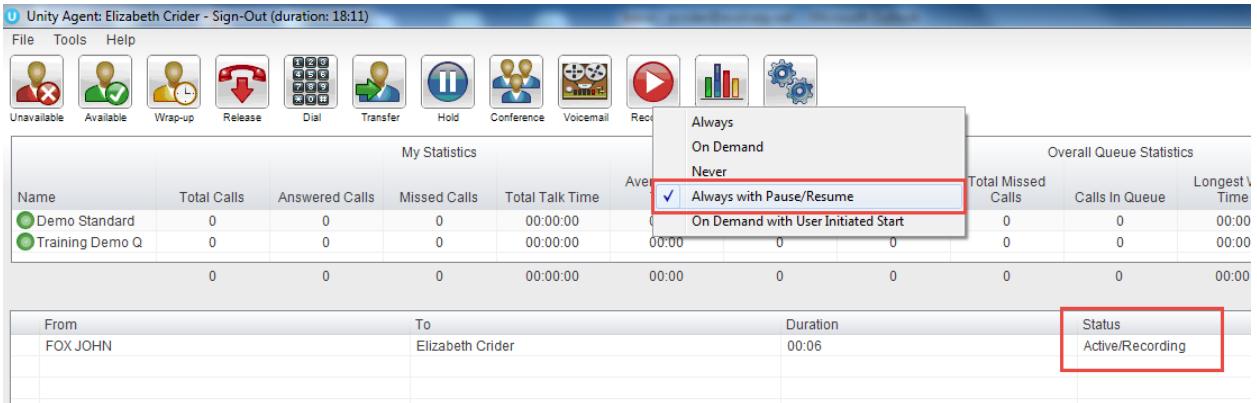
- 1) Outbound and incoming calls will be recorded.
- 2) When the agent is on an active call the status will indicate that the call is Active and being recorded.



### 2.2 Always with Pause/Resume

The Always with Pause/Resume Call Recording setting always records the call, but allows the Agent to pause and resume recording during an active call.

- 1) When the agent is on an active call the status will indicate that the call is Active and being recorded.



- 2) To pause recording click on the Recording icon. This will pause recording and the Recording icon will show it has been paused.

*\*Note the Status of the call will change to say Active/Recording paused.*

Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00

Duration	03:19	Status
		Active/Recording paused

3) To resume recording click on the paused Recording icon. The status of the call will change to say Active/Recording

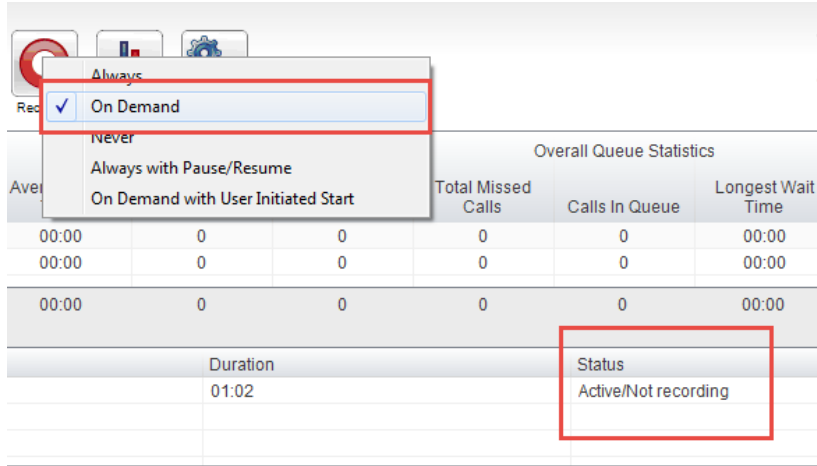
Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00

Duration	02:07	Status
		Active/Recording

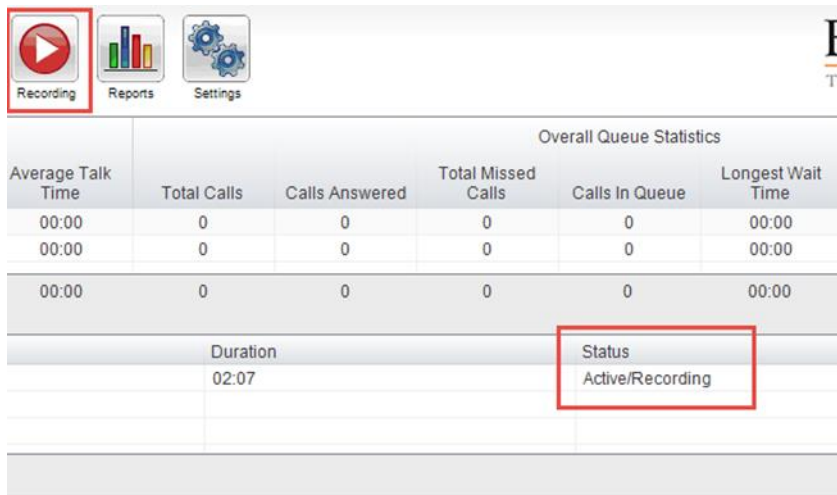
2.3 On Demand

The On Demand Call Recording setting allows users to initiate a recording at any point during a call and the recording will capture the entire length of the call. The feature will also allow for the end user to pause and resume a call once the recording has been initiated.

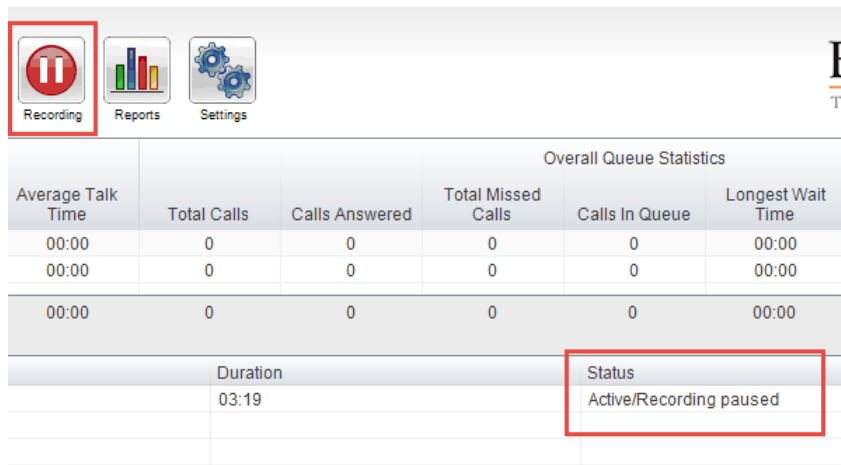
- 1) When an agent is set to On Demand recording and on an active call the status of the call will say Active/Not Recording



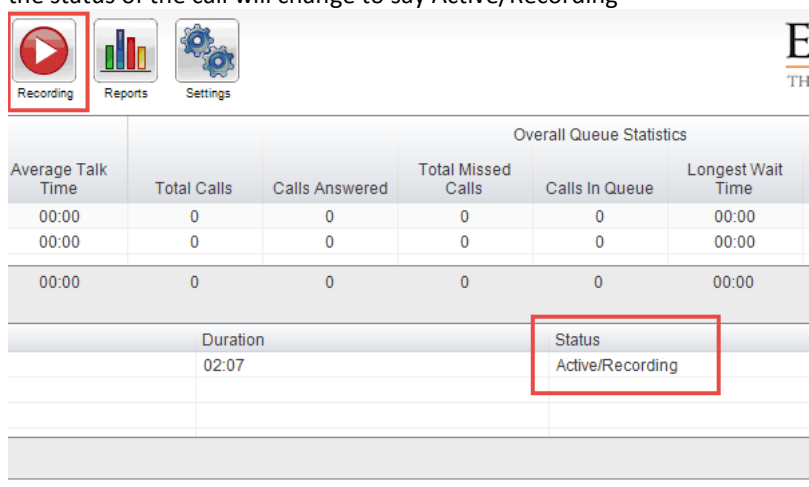
- 2) To initiate the start of the recording click on the Recording icon. The Recording icon will change to show that the call is being recorded and the status of the call will change to say Active/Recording.



- 3) Once the recording has been activated, it can be paused and resumed.
- 4) To pause the recording click on the Recording icon. This will pause the recording and the recording icon will show it has been paused. Status of the call will change to say Active/Recording Pause.



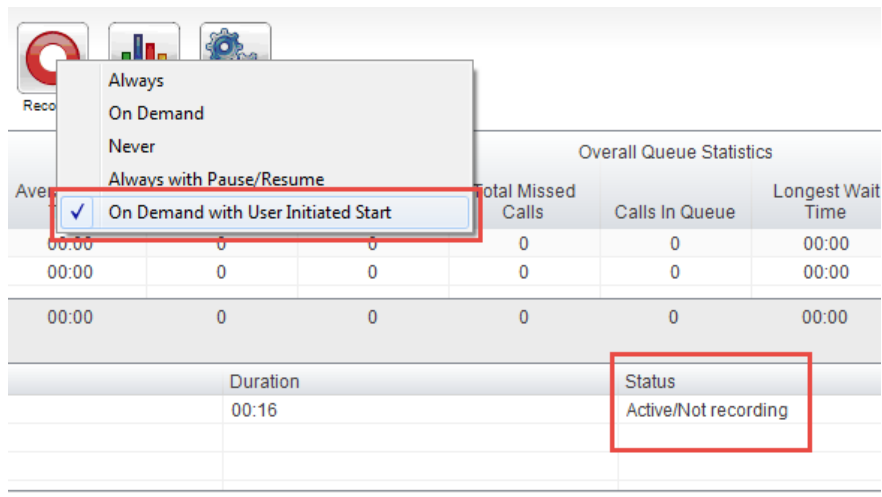
- 5) To resume the recording click on the paused Recording icon. This will resume recording and the status of the call will change to say Active/Recording



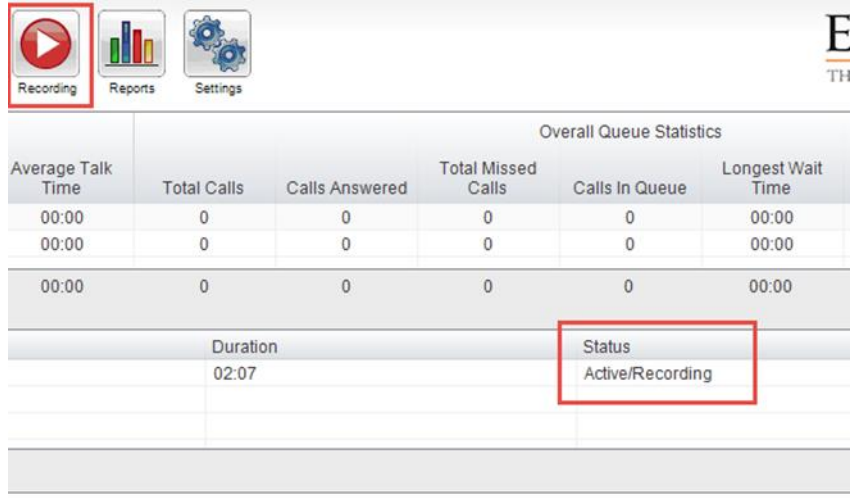
**2.4 On Demand User Initiated**

The On Demand User Initiated Call Recording setting allows end users to initiate a recording at any point during a call and will record the call from the point in which the recording was initiated. The feature will also allow the end user to pause and resume a call once the recording has been initiated and end the recording before the calls end.

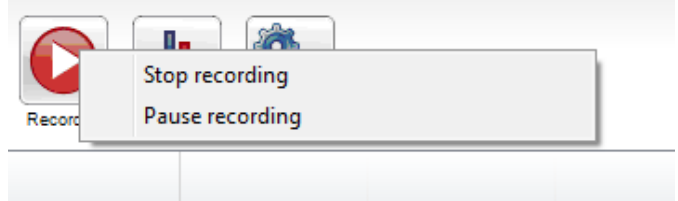
- 1) When an agent is set to On Demand User Initiated recording and on an active call the status of the call will say Active/Not Recording.



2) To initiate the start of the recording click on the Recording icon. The Recording icon will change to show that the call is being recorded and the status of the call will change to say Active/Recording.



3) When you click on the Recording icon you will be presented with two options: Stop the recording or Pause the recording.





- 4) To pause the recording select Pause Recording. This will pause the recording and the Recording icon will show it has been paused. Status of the call will change to say Active/Recording Pause.

Overall Queue Statistics					
Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00
Duration			Status		
03:19			Active/Recording paused		

- 5) To resume the recording click on the paused Recording icon. This will resume the recording and the status of the call will change to say Active/Recording





Overall Queue Statistics					
Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00
Duration			Status		
02:07			Active/Recording		

- 6) To stop the Recording select the Stop recording option and the recording will stop. The status of the call will change to Active/Not Recording.

Overall Queue Statistics					
Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00
00:00	0	0	0	0	00:00
Duration			Status		
05:54			Active/Not recording		

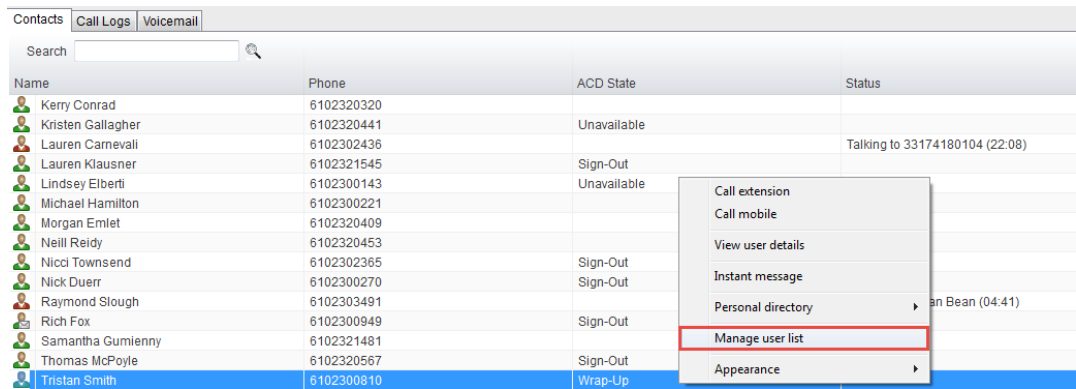
### 3. Contacts Tab

#### 3.1 User Status

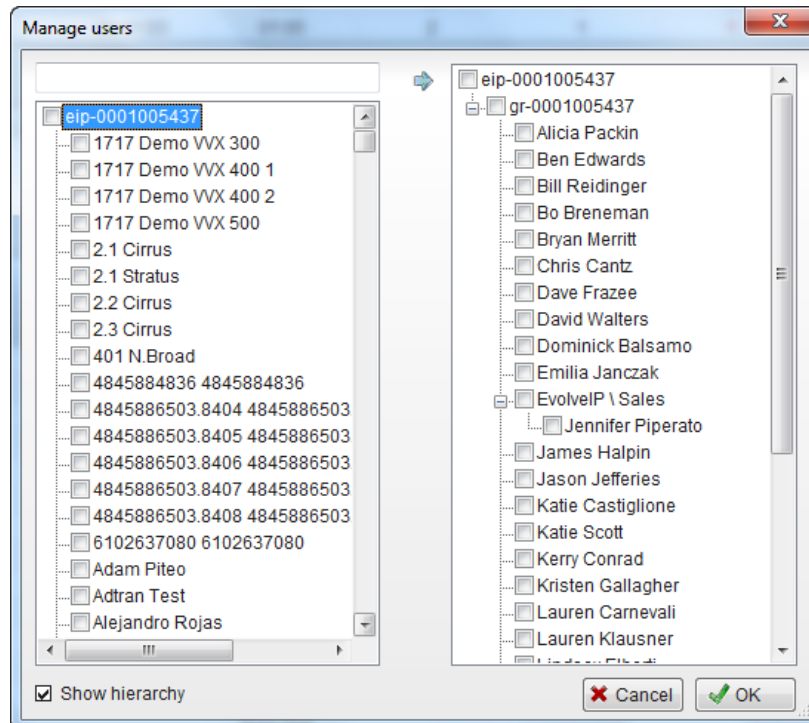
- 1)  - Available: The user is logged in and their telephone is not currently engaged. They are free to receive a call.
- 2)  - Unavailable: The user is currently engaged on the telephone
- 3)  - Ringing: The user’s telephone is current ringing.
- 4)  - Unavailable: The user has set their status to Do Not Disturb, Busy or Unavailable.

#### 3.2 Managing your User Status View

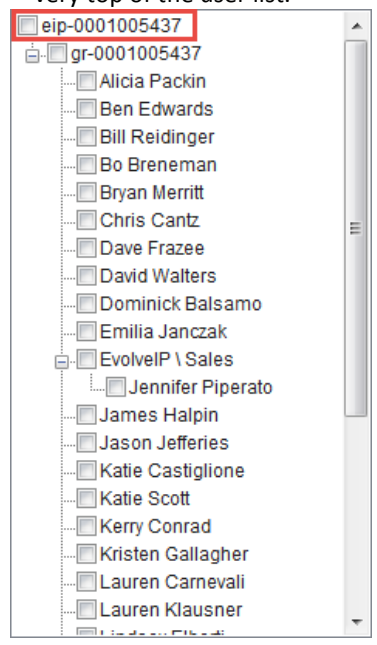
- 1) To change the users being monitoring right-click on the User Status view and select “Manage user list”



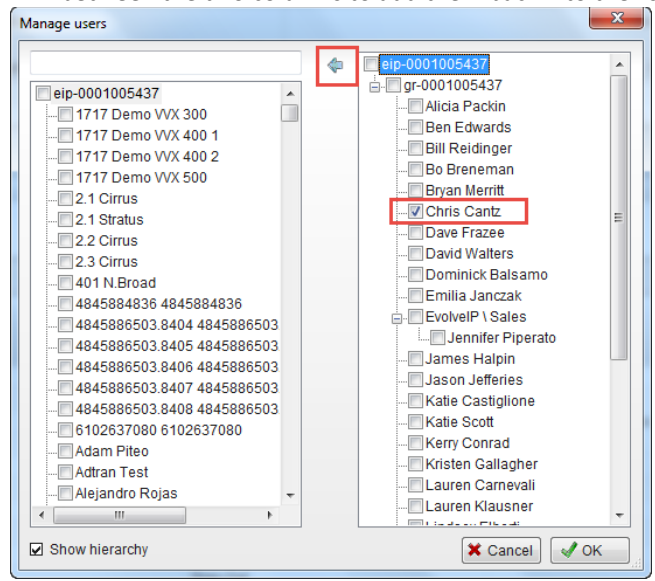
- 2) The Manage Users pop up box will appear. Users currently being monitored will be in the right column and users available to add to the list of monitored users will be on the left.



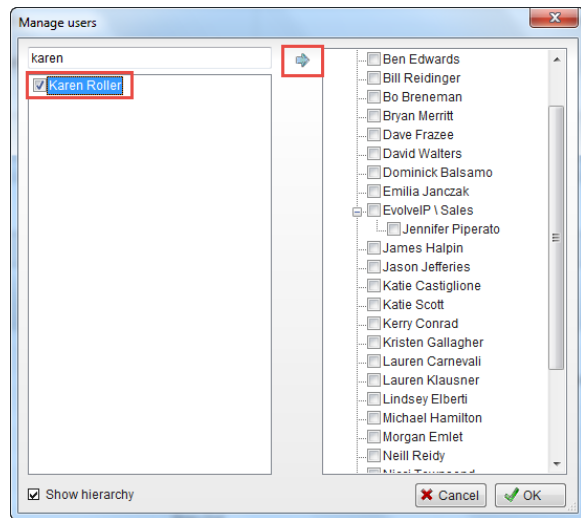
- 3) To delete all the users from the monitored list double-click on monitored user list code at the very top of the user list.



- 4) To remove select users from the monitored user list click on the users name and select the arrow in between the two columns to add them back into the list of available users.



- 5) To add users, use the search box at the top of the left column to search for users. Select the searched users name and select the arrow in between the two columns to add them to the monitored users list.



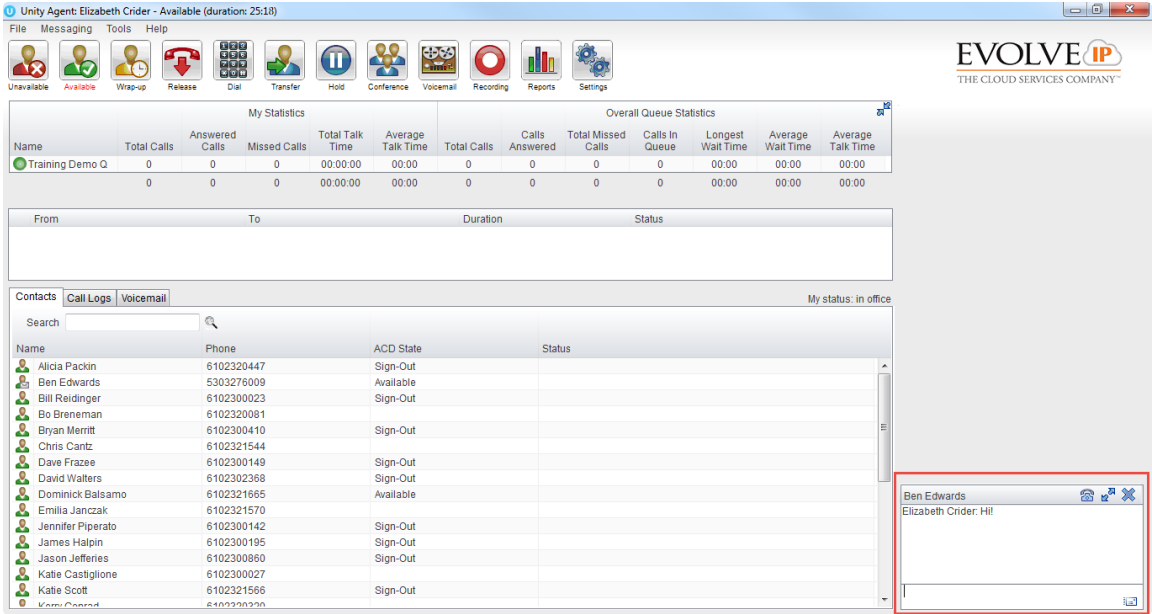
6) To save changes select the green check OK in the Manage Users pop up window.

### 3.3 Instant Message

1) To instant message a user within the manage user list, right-click on the users name and select Instant Message.



2) The IM window will appear in the IM panel on the right side of the application.



3) To open another IM window with another user from the Manage User list, click on the users name and drag and drop the user into the IM panel.

The screenshot displays the Unity Agent interface. On the left, there is a 'Manage User' list with columns for Name, Phone, ACD State, and Status. On the right, there is an IM panel with two chat windows. The top window is for 'Sam Gorfti (Offline)' and the bottom window is for 'Ben Edwards' with 'Elizabeth Crider Hill' listed below. A red box highlights the IM panel area.

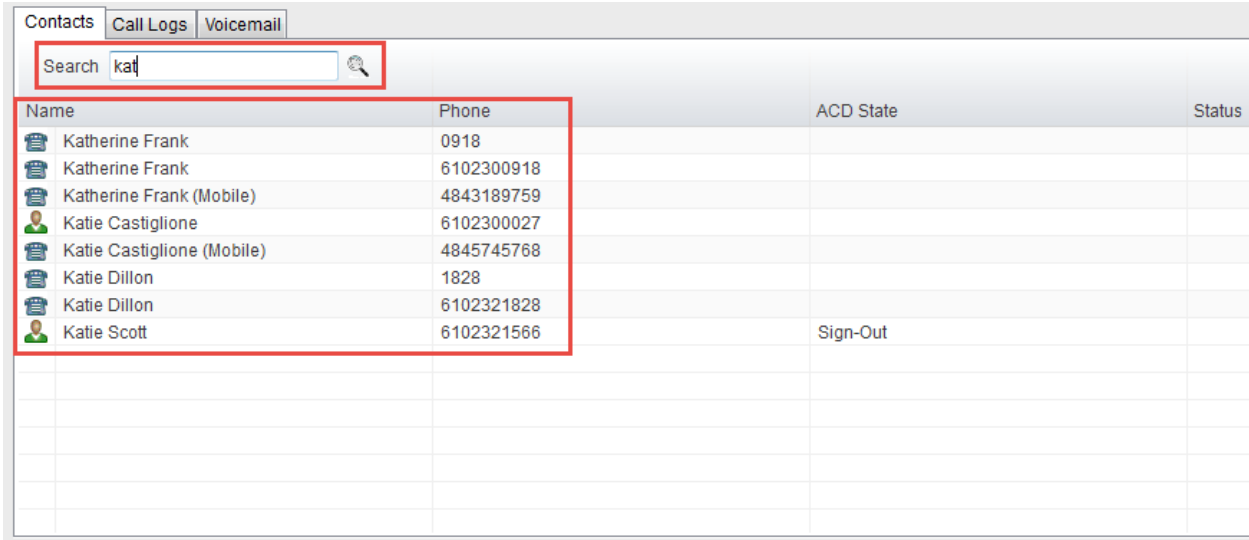
Name	Phone	ACD State	Status
Kerry Conrad	6102320320		
Lauren Carnevali	6102302436		
Lauren Klausner	6102321545	Sign-Out	
Lindsey Elbertl	6102300143	Unavailable	
Michael Hamilton	6102300221		
Morgan Emlet	6102320409		
Neill Reidy	6102320453		
Nick Duerr	6102300270	Sign-Out	
Rich Fox	6102300949	Available	
Samantha Gumieny	6102321481		
Thomas McPoyle	6102320567	Sign-Out	
Tristan Smithssssssssssss...	6102300810	Unavailable	
Sam Gorfti	6102300842	Sign-Out	
Kristen Gallagher	6102320441	Sign-Out	
Nicci Townsend	6102302365	Sign-Out	

### 4. Directories

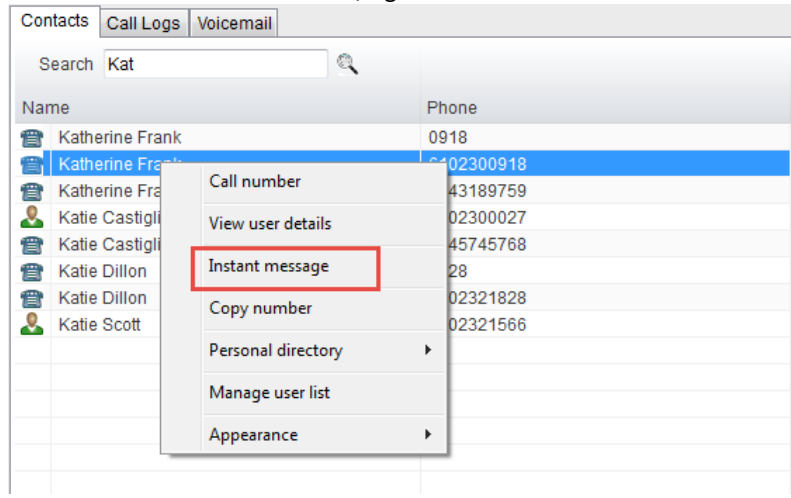
The Contacts Tab also acts as the company and personal directory. Searching for a user within the company and personal directory is performed within the same search window.

#### 4.1 Enterprise Directory

- 1) To search for a user within the enterprise, begin to type the users name in the search field. This will begin to filter the search results.



- 2) To IM within the search window, right-click on the users name and select Instant Message.



- 3) The IM window will appear in the IM panel on the right side of the application.

Unity Agent: Elizabeth Crider - Available (duration: 32:43)

File Messaging Tools Help

Unavailable Available Wrap-up Release Dial Transfer Hold Conference Voicemail Recording Reports Settings

EVOLVE IP THE CLOUD SERVICES COMPANY

My Statistics						Overall Queue Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Training Demo Q	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00

From	To	Duration	Status

Contacts | Call Logs | Voicemail My status: in office

Search: Kat

Name	Phone	ACD State	Status
Katherine Frank	0918		
Katherine Frank	6102300918		
Katherine Frank (Mobile)	4843189759		
Katie Castiglione	6102300027		
Katie Castiglione (Mobile)	4845745768		
Katie Dillon	1828		
Katie Dillon	6102321828		
Katie Scott	6102321566	Sign-Out	

Katherine Frank (Offline)

- 4) To instant message another user that is not part of the Manage Users list, search for the user within the Contacts tab.
- 5) Click on the user and drag and drop them into the IM panel.

Contacts | Call Logs | Voicemail My status: in office

Search: ryan

Name	Phone	ACD State	Status
Ryan Berg	1000		
Ryan Berg	3304090398		
Ryan Berg (Mobile)	2169900361		
Ryan Corcoran	0829		
Ryan Corcoran	6102300829		
Ryan Corcoran	0829		
Ryan Disch	0815		
Ryan Disch	6102300815		
Ryan Disch (Mobile)	6103013425		
Ryan McNeese	3609		
Ryan McNeese	8474633609		
Ryan Young	1577		
Ryan Young	6102321577		
Ryan Young (Mobile)	4197756747		

Ryan Corcoran (Offline)

Katherine Frank (Offline)

### 4.2 Personal Directory

- 1) To add a user to the personal directory right-click anywhere within the Contact Window and select Personal Directory > Add New Entry.

Contacts | Call Logs | Voicemail

Search: kat

Name	Phone	ACD State	Status
Katherine Frank	0918		
Katherine Frank	6102300918		
Katherine Frank (Mobile)	4843189759		
Katie Castiglione	6102300027		
Katie Castiglione (Mobile)	4845745768		
Katie Dillon	1828		
Katie Dillon	6102321828		
Katie Scott	6102321566	Sign-Out	

Personal directory > Add new entry

Manage user list > Import directory

Appearance > Export directory

- 2) A new window will open for you to enter in the contacts name and number. Once entered select Okay.

The screenshot shows a dialog box titled "Add Personal Directory Entry". It has two input fields: "Name" with the text "Bill Crider" and "Phone" with the text "7172018676". At the bottom, there are two buttons: "Cancel" with a red 'X' icon and "OK" with a green checkmark icon.

- 3) To search for the user, begin to type the users name in the search field. This will begin to auto-filter the contacts to match your search results.

The screenshot shows a software interface with three tabs: "Contacts", "Call Logs", and "Voicemail". The "Contacts" tab is active. Below the tabs is a search field containing "Bill C" and a magnifying glass icon. Below the search field is a table with two columns: "Name" and "Phone". The table contains one entry: "Bill Crider" with the phone number "7172018676".

Name	Phone
Bill Crider	7172018676

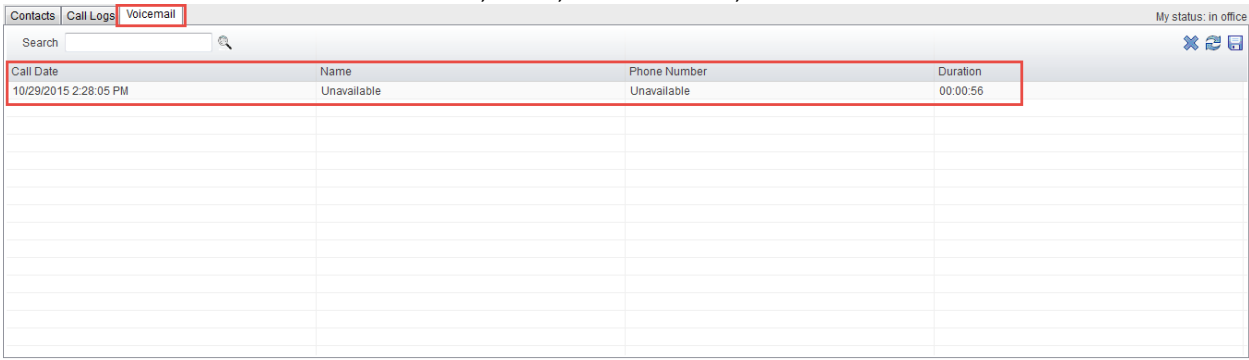
- 4) Double-click an entry to make a call.



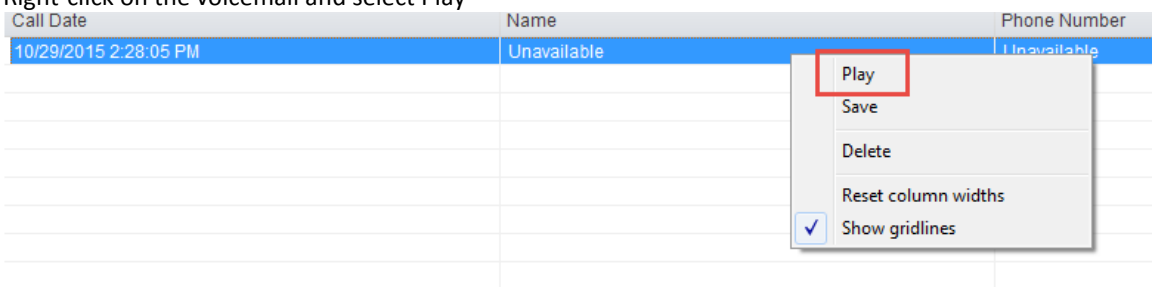
### 5. Visual Voicemail

Visual Voicemail allows the user to listen to Voicemail from the application.

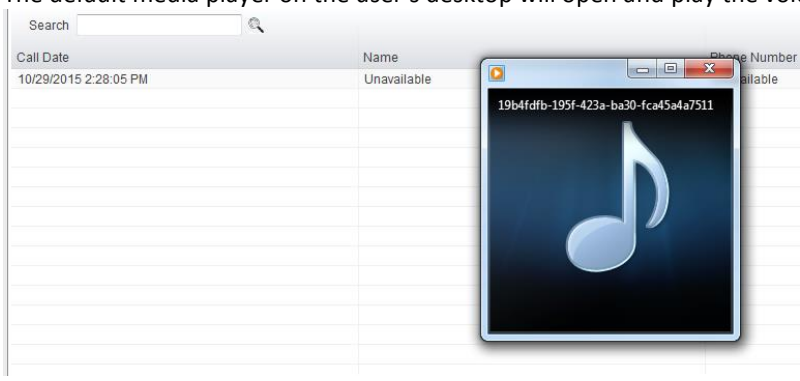
- 1. Click the voicemail tab
- 2. The voicemail details will be listed: Call Date, Name, Phone Number, and Duration.



- 3. Right-click on the voicemail and select Play



- 4. The default media player on the user's desktop will open and play the voicemail for the user.



- 5. To delete the voicemail right-click on the voicemail and select delete.