UNIVERGE BLUE™ CONNECT

UNIVERGE BLUE® CONNECT

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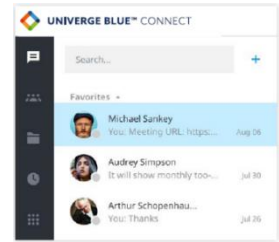
OVERVIEW

The UNIVERGE BLUE® CONNECT Desktop App brings essential collaboration tools together, making teamwork easier than ever. See who is available, send chats and texts, place and receive calls, share screens, start video calls, and share files – all from one application.

INSTALLATION

UNIVERGE BLUE® CONNECT Desktop App is available for both Windows® and Mac® platforms.

▪ For Windows & Mac, visit **https://www.univerge.blue/apps** to download

Download the UNIVERGE BLUE® CONNECT Desktop App here

DOWNLOAD CONNECT FOR PC
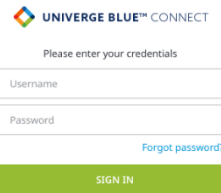
DOWNLOAD CONNECT FOR MAC

▪ For Mobile devices, visit the **app store**, search, and download the following 2 apps:
  1. Univerge Blue Connect
  2. Univerge Blue Meet

LOG IN

Once installed, login using the following credentials:

▪ Username: [as previously provided by NATG]
▪ Password: [as previously provided by NATG]
▪ Click **SIGN IN**
▪ You will be prompted to change your password

Note: if you have forgotten your password, simply click **"Forgot Password?"**, you will be sent an email with instructions on how to reset it

Once logged into the application, you will be prompted to select a call mode. You can use your application in two ways:

▪ **Call Controller Mode**: This will be used if you also have a desk phone
▪ **Softphone Mode**: This will be used if you do not have a desk phone and will place and receive calls from your PC or Mac® using the computer's external speaker and microphone. Note: A headset is highly recommended for this mode

It may take some time for the application to collect info about users in your organization, so you may see a spinning circle during the load time. Once it is finished, you will see the notification to select an active chat or start a new chat:
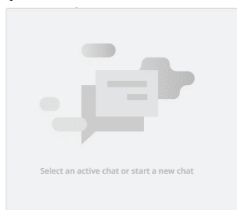
Please select the way UNIVERGE BLUE CONNECT will work:

Softphone
Allows you to place and receive calls from your PC using the PC speaker & microphone or external speaker & microphone. This version of softphone includes: call hold, call park, mute.

Call controller
Allows you to control your desk phone remotely for placing, transferring and parking calls. Call other users in your company with one click.

START

NOTE: Emergency calls are not supported from the UNIVERGE BLUE CONNECT Desktop App

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UNIVERGE BLUE® CONNECT

CUSTOMIZING LAYOUT

1. Once you have logged in to Univerge Blue, navigate to your presence icon (bottom left of your screen which shows the letter of your name (unless you have changed your profile picture))
2. Click **Application settings**
3. **Reception view** – Select this box. This will change the layout of your contact page so that you have options for favourites, Univerge Blue Contacts, Company Contacts, and Personal Contacts
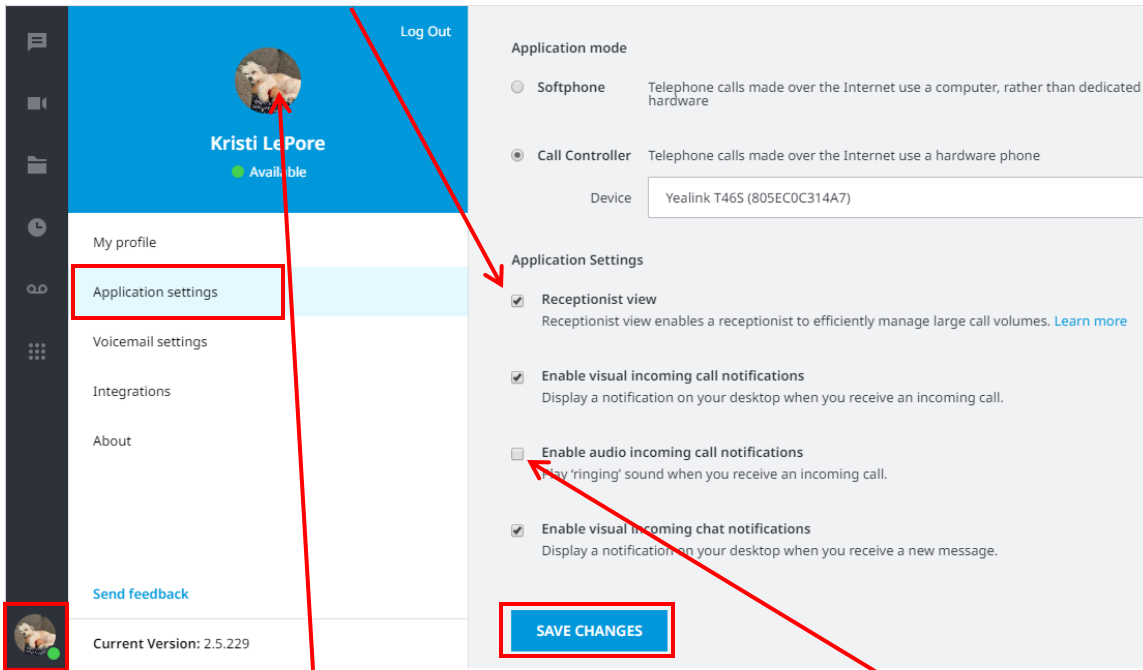

4. Disable Audio incoming ring (if you are using a desk phone) - Uncheck **"Enable audio incoming call notifications"**. This will stop your computer from ringing, along with your phone and mobile device
5. Change your Profile Picture – By default, your profile picture is the letter of your name. You can upload a picture but clicking on the letter and selecting a photo
6. When you are done making your changes, click SAVE CHANGES

PRESENCE

Presence features within CONNECT help indicate to users which of their co-workers are available for collaboration and communication.

Setting your presence Manually
You can manually toggle your presence by clicking the current presence icon in the bottom left corner of your display.
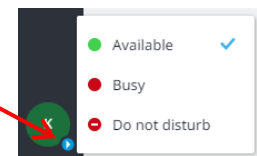
Presence Icon

PRESENCE ICON	PRESENCE STATUS	HOW IS IT SET?
●	Offline	Automatically - when a user's desktop goes offline
●	Away	Automatically - when a user locks their computer or we detect no activity on the desktop for 10 min
☎	On a call/In a Meeting	Automatically - when a user is on a call or in a meeting
⊖	Sharing Screen	Automatically when a user in a meeting sharing your screen
●	Busy	Manually - when a user wants to indicate to others that they are busy and may not respond right away
●	Available	Automatically or Manually. This status indicates that a user is available to chat or talk on the phone

NATG Integrated Systems

natgisit.ca l 604-856-9155 l Service@natgisit.ca

PLACING A CALL

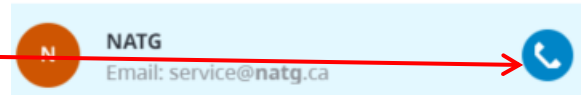### Call Controller Mode – Uses your desk phone to make/answer calls

1. You can place a call using the Dialpad ⊞ or by clicking on the 'Dial' button in a chat or a user's contact card

2. Pick up the handset or press the 'Speaker' button on your physical phone

Softphone Mode – Uses your computer to make/answer calls

1. You can place a call using the Dialpad ⊞ or by clicking on the 'Call' button in a chat or a user's contact card
2. The call will be placed through the computer

RECEIVING A CALL

Call Controller Mode – Uses your desk phone to make/answer calls

1. To answer an incoming call, pick up the handset, using your headset, **or** Press the 'Speaker' button on your physical phone.
2. You can reject a call or send an incoming call to voicemail using the desktop application

Softphone Mode – Uses your computer to make/answer calls

1. To answer an incoming call, click the 'Pick-Up' button in the incoming call notification or the 'Hang-Up' button to ignore the call. Click on the 'Voicemail' button will send the caller directly to voicemail

TRANSFER

You can choose between three options to transfer calls:

Blind transfer allows you to transfer the call without having a conversation with the user you are transferring to:

1. While on an active call press 'Transfer'
2. Select the contact or use the Dialpad to enter the phone number
3. Click on the 'Blind' transfer icon

Warm transfer allows you to consult with the party to which you are transferring a call to before completing the transfer:

1. While on an active call press 'Transfer'
2. Select the contact or use the Dialpad to enter the phone number
3. Click on 'Warm' transfer icon . Your first call will be placed on hold. Your second call will Be delivered to your phone.
4. Press the Answer key (on your phone)
5. Announce call. Click Complete Transfer

To cancel: Click End 🔴 button, then click Resume (if in call controller mode, the Resume key is located on the display of your phone)

Transfer to voicemail allows you to send the call directly to voicemail

1. While on an active call press 'Transfer'
2. Key in name or extension
3. Select 'Transfer to Voicemail' icon
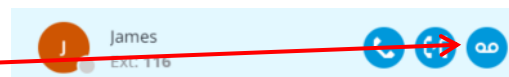
UNIVERGE BLUE® CONNECT

CALL PARKING

Call Park is a feature that allows CONNECT users to put a call on a public call park and have a different user pick it up on another phone by dialing the park location.

1. With an active call, Press the Park P icon next to the active call
2. The system will tell you which extension the call is parked on (ex. Parked on 901)
3. Contact co-worker and advise them to "Pick up Park "901"

To pick up the call: Using the Dial pad, enter the park number, then click enter on your keyboard **or** Lift desk phone handset (or press Speaker), dial park number

Note: After 60 seconds of a call being parked it will ring back at the original phone.

CALL FLIP

Call Flip allows you to continue your active call using a different device. For example, you can flip a call from your mobile to your desktop phone and vice versa.

1. While on an active call, press the Flip button
2. The call will be placed on hold and all other assigned devices will start ringing
3. Pick up the call and continue the conversation on the new device
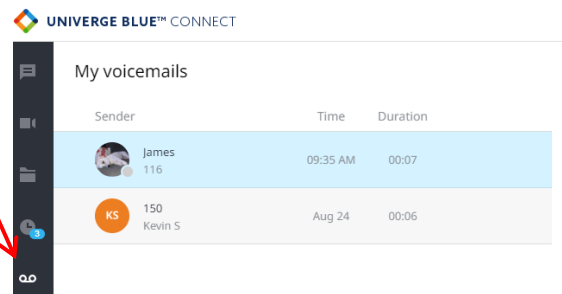
CALL HISTORY/REDIAL

The Call History tab shows a list of all your past calls, making it easy to return missed calls and see logs of previously made calls.

1. Click the Call History icon to view incoming/outgoing/missed calls
2. Hover over the call, select action you would like to take place:
   a. Phone icon to dial them
   b. Chat icon to chat (for internal extensions) with them or
   c. SMS icon (for external number, if enabled)

VOICEMAIL

1. To access your voicemail, Select the voicemail icon
2. Your voicemails will appear
3. Click on the voicemail you would like to listen to
4. Click Play or read transcription (note: must have PRO license for transcription and have the feature enabled under your accounts Voicemail settings)

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My voicemails

Sender	Time	Duration
James 116	09:35 AM	00:07
150 Kevin S	Aug 24	00:06

CONFERENCE CALLING

### CALL CONTROLLER MODE – Uses your desk phone to make/answer calls

Using your desk phone, add a third person to any active call:

1. Start a regular call with one of your contacts or any external number
2. Press the Conference key on the display of your desk phone
3. Call the next person you would like to conference in
4. Once the call is connected, press the Conference key again
5. To end confer, hang up

SOFTPHONE MODE – Uses your computer to make/answer calls

Using your computer, add a third person to any active call:

1. Start a regular call with one of your contacts or any external number
2. Click 'Add Call' on the active bar
3. Select a contact to add to the call or enter a number to call
4. The first call will be put on hold.
5. To start a 3-way call click 'Merge Calls'
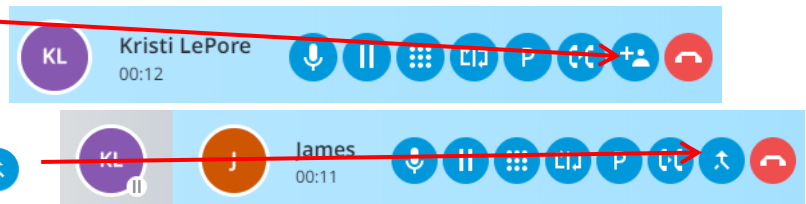
MEETINGS (Online)

Meeting Features

- Built-in Audio Conferencing: includes a conference call number and PIN codes so participants can join by phone or computer
- 4 video participants for Essential users, 30 video participants for Pro users, and up to 200 audio participants
- Screensharing
- Lock meetings so new participants cannot join
- Record and share later (Pro or Pro Plus license required)

Meeting Invites

1. From the Meetings screen:
   a. Copy Info and paste that into a calendar invite or email OR
   b. Click Send via email to have it automatically populate an email
2. From your Chat screen:
   a. Select the contact, then click the meet now icon. This will send them a link to click join
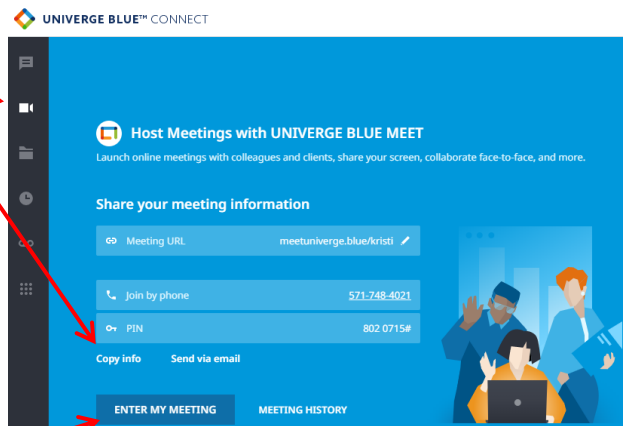
Start a meeting

Users can start a meeting in 2 different ways:

1. From the **Meetings screen**, click ENTER MY MEETING. The meeting app will launch. From there select whether you would like to use your Computer Audio or Phone Audio, then click JOIN NOW
   At the bottom of your screen, you will then see the option to choose what you would like to share:
   a. Webcam
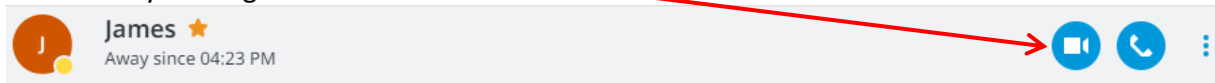   b. Share your computer screen or
   c. Simply on audio

Note: If you do not have computer audio, you will need to join by phone as well

2. **From the Chat screen** 🔲
    a. From the Chat screen, you can start a meeting with members of a one-on-one or team chat by clicking on the 'Meet Now' button

Note: If you do not have computer audio, you will need to join by phone as well.

Lock a Meeting (Only applicable with Pro license)
When all your participants have joined the meeting, you can lock the meeting so no one can join afterward.
1. To do so, click the lock 🔓 icon at the top of the screen.

Record a Meeting (Only applicable with Pro license)
1. To record the meeting, click the Record icon ◎. When the meeting is being recorded, the icon will be red ◉

End/Leave the Meeting
1. Click the Exit icon ⊗
2. You will be given the option to:

   CANCEL   LEAVE   END FOR ALL

CHAT
CONNECT Desktop enables you to instant message any of your co-workers

Sending a chat
There are a few ways to initiate a chat:
1. In the Chat screen, click the ➕ icon, then select New Chat, and then select the person from the list
2. In the Chat screen, enter the coworker's name in the search bar, and then click on the Chat icon
3. In your call history 🕐 screen, hover over the contact and click the chat 🔲 icon
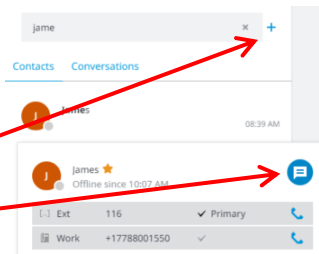
Receiving a chat
If someone sends you a chat while you are online, the app will visually notify you that you have a new message and the message will show up in your 'Recent' list. If someone sends you a chat while you are offline, you will receive an email. Once you come back online, your desktop app will highlight the unread chat messages. To access your chats, click the Chat 🔲 icon

In-chat collaboration options
The 'Call' 📞 button will call the collaborator on their extension 'Meet Now' 📹 button will start a meeting (screen share, video call, conference call) with a chat collaborator
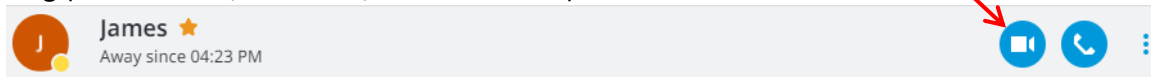
Note: If using Meet Now, your coworkers will be sent an invite to join They can then click the join icon. If they do not have speakers, they can join by phone. Click the join link, this will open the meeting application. You can then choose whether you would like to share your webcam, share your screen, or just use it as an audio conference call

📹 You started a meeting   Join

📞 Join by phone   571-748-4021
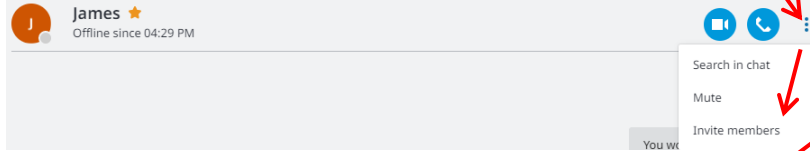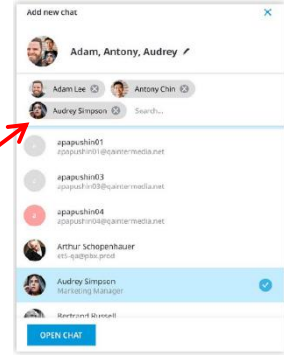
🔑 PIN   802 -0715#
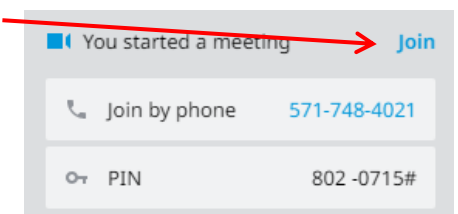
Team Chat

CONNECT Desktop allows you to create team chats so that multiple users can participate in a chat at the same time. **Creating a team chat:**

1. You can add one or more members to an existing 1-on-1 chat
2. Or You can create a group chat using the 'New Chat' workflow

Chat History

Chat history is retained indefinitely. Chat history is also synced across all your desktop and mobile devices so that you can always refer to past conversations and have the desired context as you chat with co-workers

Search conversation history to find relevant messages

INTEGRATIONS

CONNECT CRM Screen Pops

Connect your UNIVERGE BLUE® CONNECT desktop app to third-party platforms (Salesforce, Zendesk, etc.) and custom CRMs to quickly view the caller's profile on inbound and outbound calls and in call history.

CONNECT for G-Suite®

Click to call phone numbers on any web page, start meetings from your Chrome™ browser, and more.

CONNECT for Microsoft Outlook®

Place calls, view presence, click-to-chat, and start meetings all from your Outlook contact list, emails, and calendar events.

Enabling Integrations

1. Click your presence ball in the bottom left corner of your display.
2. Select Integrations
3. Select the integrations you would like to enable
4. Click Save changes

MOBILE APP

The UNIVERGE BLUE Mobile App transforms a mobile phone into an essential collaboration tool, making teamwork on-the-go easier than ever.
Users can see who is available, send and receive team chats and messages, place calls, and see voicemails all from one application—anytime, anywhere.

INSTALLATION

UNIVERGE BLUE Connect, Meet, and Share apps are available for Android and IOS devices. Visit the **app store**, search, and download the following 2 apps:

1. Univerge Blue Connect
2. Univerge Blue Meet

LOGIN

1. Log in to your mobile app using your email address and the password you created when you set up your desktop. If you are not sure what your password it, follow the link for 'Forgot Password'
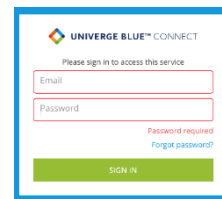
PLACING A CALL

1. Navigate to your Contacts tab, History tab, or Voicemail tab
2. In the top left corner of your display, you will see the Dialpad
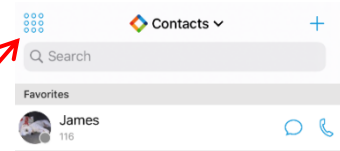
TRANSFER

Blind transfer: Automatically transfer the call to another party without talking to that party.

1. To blind transfer in **iOS**: From the active call press More > Transfer Call then enter the phone number or choose a contact from the list.
2. To blind transfer in **Android**: From the active call press "+" then enter the phone number or choose a contact from the list.

Warm transfer: Consult with the party to which you are transferring the call before completing the transfer.

1. To warm transfer in **iOS**: From the active call press More > Add Call then enter the phone number or choose a Contact from the list > the second call will be established > More > Transfer to Caller.
2. To warm transfer in **Android**: From the active call press "+" then enter the phone number or choose a Contact from the list > Call (your original call will be placed on hold) > the second call will be established > More > Transfer to Caller.
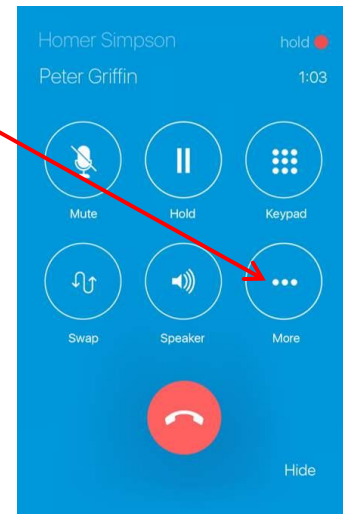
UNIVERGE BLUE® CONNECT

CALL PARKING

Call Park is a feature that allows CONNECT users to put a call on a public call park and have a different user pick it up on another phone by dialing the park location.

1. With an active call, press the More icon ⋯
2. Select Park
3. The system will tell you which extension the call is parked on (ex. Parked on 901)
4. Contact co-worker and advise them to "Pick up Park "901"
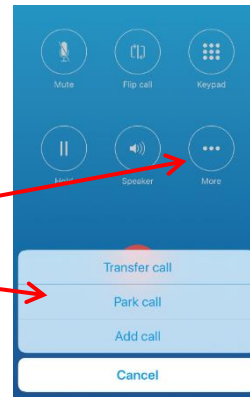
To pick up the call: Using the Dial pad, enter the park number, then click Send **or** Lift desk phone handset (or press Speaker), dial park number
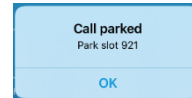
CALL FLIP

Call Flip allows you to continue your active call using a different device. For example, you can flip a call from your mobile to your desktop phone and vice versa.

1. While on an active call, press the Flip icon
2. The call will be placed on hold and all other assigned devices will start ringing
3. Pick up the call and continue the conversation on the new device

CONFERENCE CALLING

1. With an active call, press the More icon ⋯
2. Select Add Call
3. Select Contact to add or use the Dial pad to enter a new number
4. Your first caller will be put on hold while your phone calls the second contact. Once the contact answers press the More icon again, then select 'Make conference'
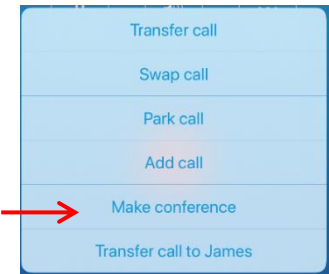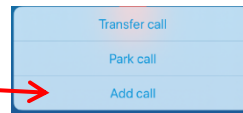
CALL HISTORY

The Call History tab shows a list of all your past calls, making it easy to return missed calls and see logs of previously made calls.

1. To review your call History, navigate to your History tab located at the bottom of your screen
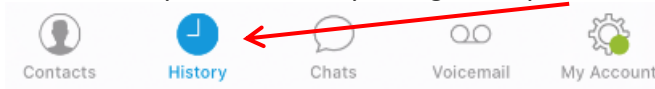
TEAM CHAT

1. To create a Chat with one of your Coworkers, navigate to your Chat tab

2. Continue an already previous started chat or to begin a new chat, click the ➕ icon in the top right of your screen and select your contact
3. You can attach an item to your chat message as well ➜

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natgisit.ca l 604-856-9155 l Service@natgisit.ca
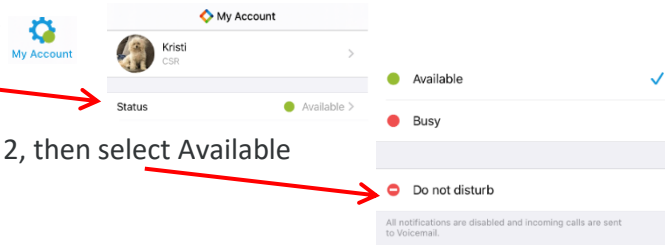
UNIVERGE BLUE® CONNECT

DO NOT DISTURB

Putting your phone on Do Not Disturb will send calls directly to voicemail during this time so you are not interrupted in a meeting

1. Navigate to 'My Account'
2. Select Status
3. Select Do Not Disturb

**To Remove**: Follow steps 1 – 2, then select Available
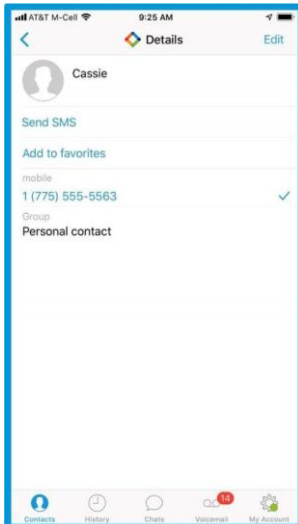
CONTACTS

Contact Sync

People store contacts in lots of places, such as on their phone and in email.

With the UNIVERGE BLUE CONNECT app, you can sync your contacts from popular 3rd-party platforms, such as Office365, Google, Outlook, and more, to all of your CONNECT apps from your mobile device (Android, iOS). This means whether you are in the Desktop app or Mobile app, you can reach the people you need to.

1. Enable Contact Sync - In the Mobile app, tap My Account, then Sync Contacts to CONNECT and follow the steps.
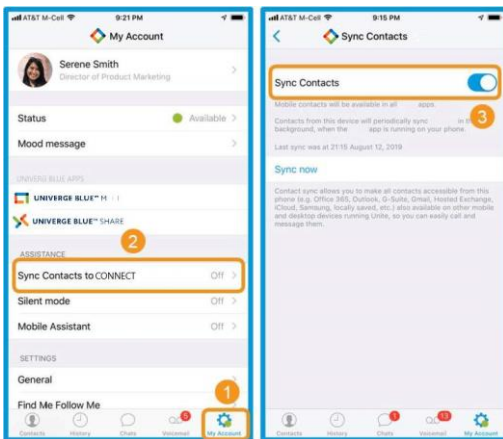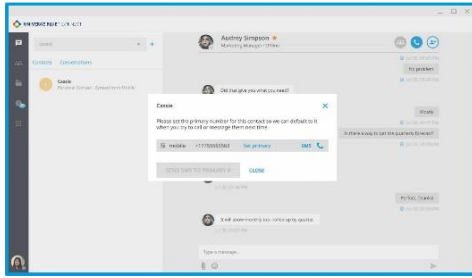
2. See the newly added contacts in the Mobile app Synced contacts are indicated by "Personal contact" underneath the contact's info.

3. Find the same contact in the Desktop app. The synced contact also appears in your Desktop app. Just click the blue phone icon to call.

Summary: With Contact Sync, the contact you need is always at your fingertips. And since this is contact sync, not an import, you don't have to worry about changes. New contacts and edits you make continue to sync so the contacts in your apps are up to date.

Pin Contacts to Favourites

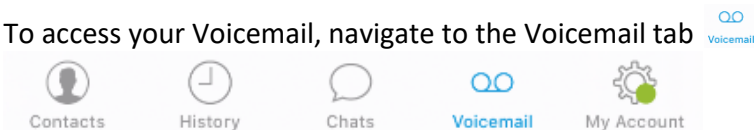1. Navigate to your Contacts tab
2. Select contact you want to pin
3. Select Add to Favourites
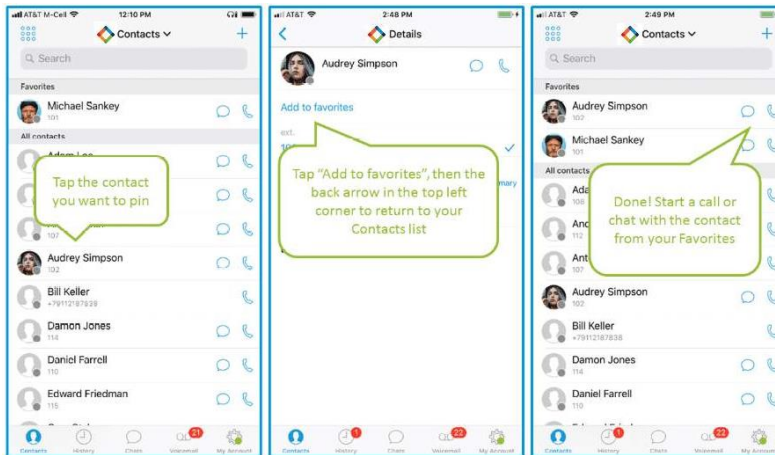
VOICEMAIL

Listen to voicemail messages, read voicemail transcriptions, share messages with other contacts, return calls, or delete voicemails all from the Mobile App.
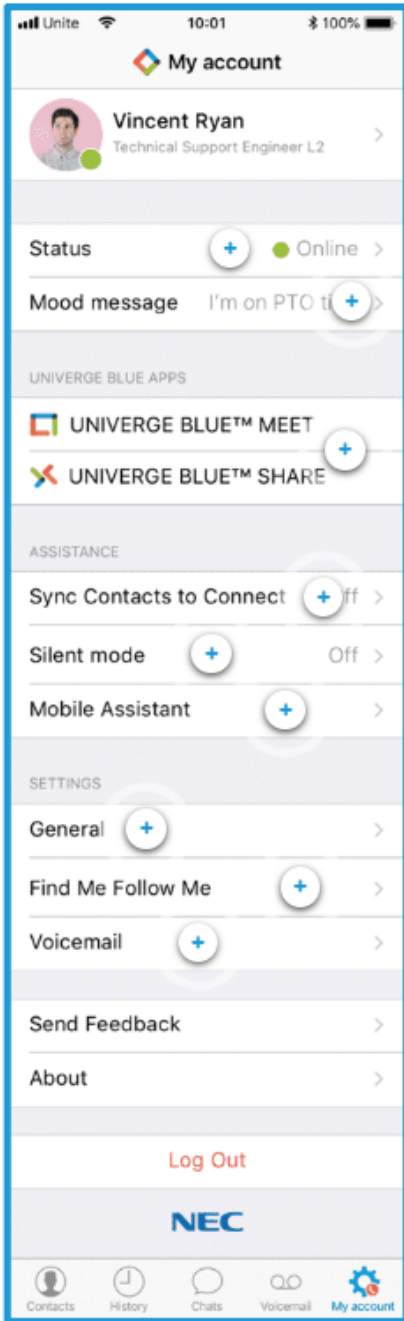
1. To access your Voicemail, navigate to the Voicemail tab

2. You will see your voicemails listed, select the voicemail to listen to it

UNIVERGE BLUE® CONNECT

PERSONALIZED SETTINGS

The UNIVERGE BLUE CONNECT Mobile App works the way you want it to. Personalize it through the settings so you get most of the features that matter to you.

Status: Set your status so teammates know if you're available or busy. This will show offline if you're not logged into CONNECT or if you're not getting WiFi or cellular data signal

Mood message: Let co-workers know what you're p to, share location information, a quote for the day, or whatever else you what to.

Univerge Blue apps: Launch MEET or SHARE from here. See the Collaborate section of this course for details on using these apps.

Sync Contacts to CONNECT: Sync Contacts from 3rd party platforms, such as Office 365, G-suite, iCloud, and more to all your CONNECT Apps (Android, IOS)

Mobile Assistance: Get recommendations for being more productive with your phone system. Mobile assistant learns your calling patterns and preferences over time, then recommend custom calling rules for you. Some examples of recommendations are:

- Send specific colours straight to voicemail at certain times of day
- send specific colours straight to your mobile phone when you're at certain locations
- send voicemail transcriptions directly two-out repository

General: Set your app to save and synchronize favourites and conference bridge Contacts to the server. Save logs to a file for troubleshooting or other purposes.

Find me Follow Me: Create rules around how you like to receive your business calls:

- how long your devices will ring until routed elsewhere
- where to for calls to if unanswered, like a personal phone or possibly to another contact, how long those numbers will ring an in what order
- finally, moving on answer calls to voicemail

Voicemail: Configure general voicemail preferences and notifications, choose a default greeting, or record your own and reset your pin

NATG