

NEC

UNIVERGE BLUE™ CONNECT

Control Panel Administration Guide

The screenshot shows the NATG logo in the top left corner, followed by navigation links: HOME, USERS, SERVICES (with a dropdown arrow), and ACCOUNT (with a dropdown arrow). Below this is a dark grey header bar with the text "UNIVERGE BLUE™ CONNECT".

A vertical sidebar on the left contains the following menu items: General (highlighted in blue), Subscription, Users, Phone Numbers, Auto Attendant, Groups, Contact Center, Locations, Devices, Resources & Utilities, Settings, Call Report, Quality, Reports & Analytics, Apps & Integrations, and Call Recordings.

The main content area features a top navigation bar with icons and labels for: Manage users, Settings, Active calls, Order phones, Pricing, and Provisioning Wizard.

The central content area is titled "UNIVERGE BLUE CONNECT" and includes the following sections:

- Voice Services:** Cloud-based phone service with 90+ enterprise-grade features. Includes a "Manage UNIVERGE BLUE™ MEET" link.
- Team Chat:** Messaging service for communication with individuals and team. Includes a "Manage UNIVERGE BLUE™ SHARE" link.
- MEET:** HD video conferencing and screen sharing. Includes a "Manage UNIVERGE BLUE™ MEET" link.
- SHARE:** File sync and share with backup for all platforms. Includes a "Manage UNIVERGE BLUE™ SHARE" link.

Below these are two grey boxes:

- Desktop & Mobile Apps:** Mobile app: Android, iPhone; Desktop app: Windows, Mac OS.
- Integrations:** UNIVERGE BLUE™ CONNECT integrations with Microsoft, Google, Salesforce and other business applications. Includes a "Manage integrations" link.

At the bottom, there are two columns of "Get Started" and "Helpful information. Learn how to" steps:

- Get Started:**
 1. Add phone numbers
 2. Port existing phone numbers
 3. Assign phone numbers to users
 4. Order or add hardware
 5. Set up Auto Attendant
 6. Create Groups
- Helpful information. Learn how to:**
 - Add phone numbers
 - Port existing phone numbers
 - Order new hardware
 - Manage Voice Services users



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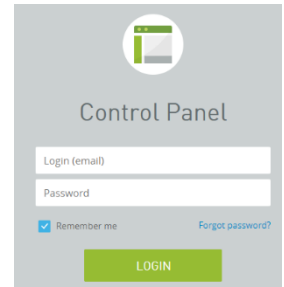
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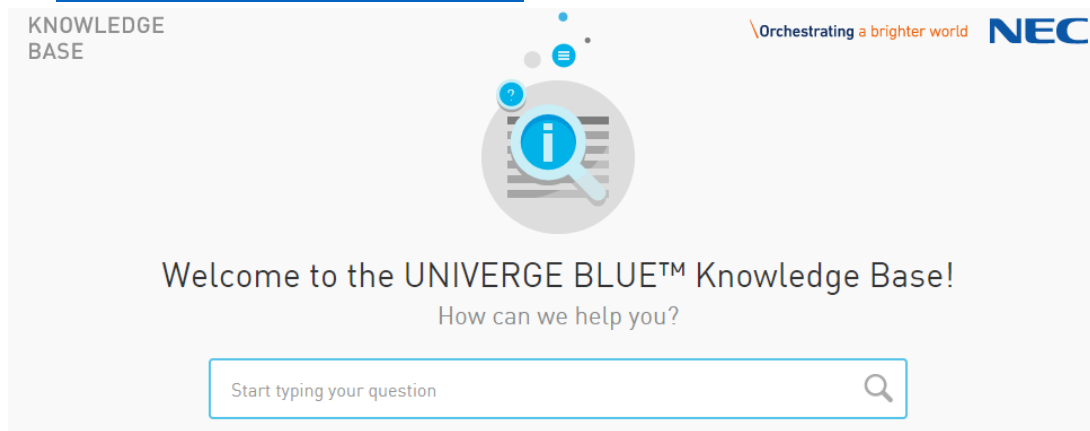
Logging In to Control Panel

1. Visit the Control Panel log in page: <https://portal.univerge.blue/Portal/User/Login> (recommend bookmarking this link)
2. Enter your email (must have admin rights)
3. Enter default password: [as previously provided by NATG]
Note: If you forget your password, click “Forgot Password” and follow the prompts
4. Click 
5. If this is your first time logging in, you will then go through the security questions



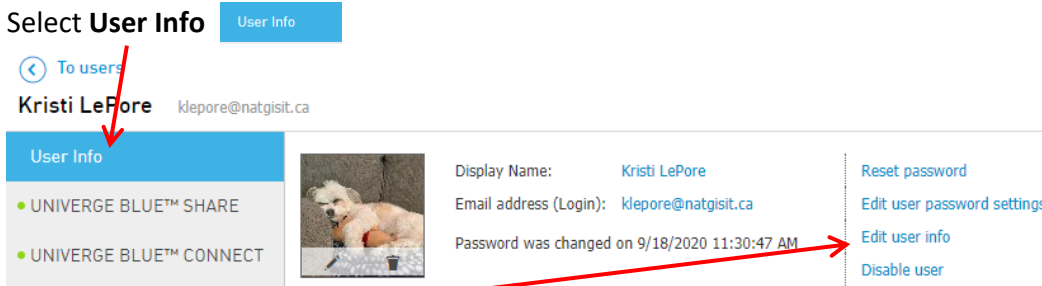
Univerge Blue Knowledge Base

1. For additional user guides and how-to’s, visit the Univerge Blue Knowledge base at <https://kb.univerge.blue/en-US/Main>



Changing Name of Phones

1. Log in to **Control Panel**
2. Select **Services**, and then **UNIVERGE BLUE™ CONNECT**
3. On the left-hand side, select **Users**
4. **Select** the **user** you would like to **change** the name of
5. Select **User Info**



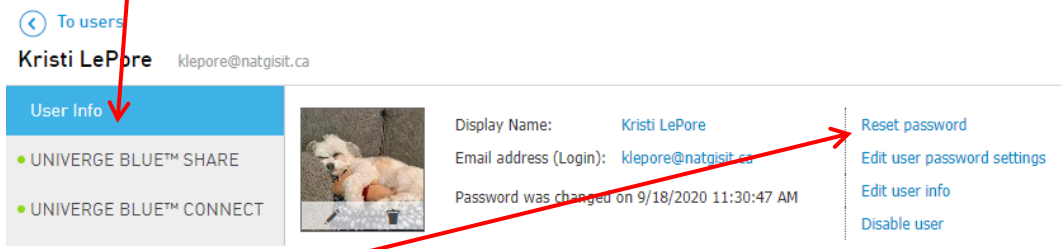
6. Select **Edit user Info**
7. In the **Display Name** slot, **enter the new name**
8. Click **Save Changes**

NOTE: Changing the name of the phone does not reset their Connect application, this simply changes their name. This means: their chat history, call history, voicemails, etc.. will all be there when you assign this to the new user. To default the programming, the user must be deleted and then re-added and it’s recommended that NATG do this for you.



Resetting Users Desktop/Mobile App login password

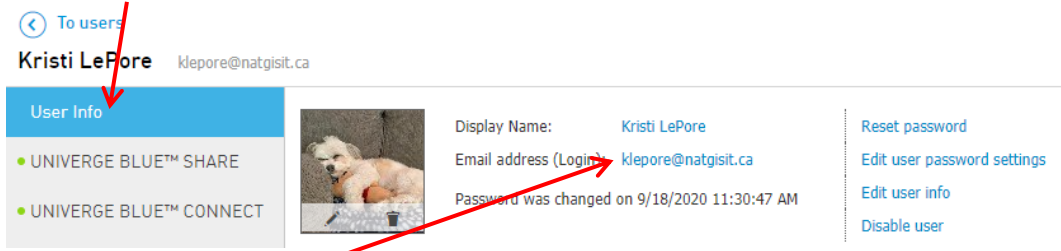
1. Log in to Control Panel
2. Select **Services**, and then **UNIVERGE BLUE CONNECT**
3. On the left-hand side, select **Users**
4. **Select the user** you would like to reset the login password
5. Select **User Info**



6. Select **Reset password**
7. **Enter password** you would like to reset it to
8. Click **Reset Password**

Changing user Login (email address)

1. Log in to Control Panel
2. Select **Services**, and then **UNIVERGE BLUE CONNECT**
3. On the left-hand side, select **Users**
4. **Select the user** you would like to change the email address
5. Select **User Info**

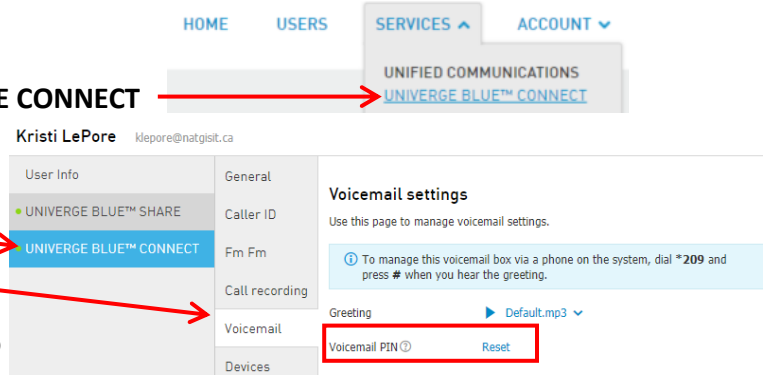


6. Select **Reset password**
7. **Enter the new email** address
8. Click **Save Changes**



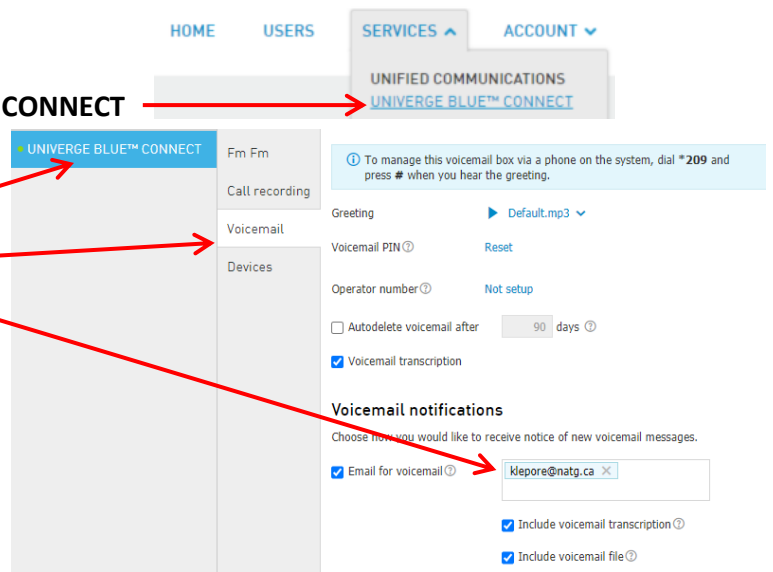
Resetting Voicemail Password

1. Log in to Control Panel
2. Select **Services**, and then **UNIVERGE BLUE CONNECT**
3. On the left-hand side, select **Users**
4. **Select** the user you would like to change
5. **Select** **UNIVERGE BLUE™ CONNECT**
6. **Select Voicemail**
7. Next to Voicemail PIN, click **Reset**
8. **Enter the PIN** you would like to reset it to
9. Click **Save Changes**



Changing Voicemail to Email Address

1. Log in to Control Panel
2. Select **Services**, and then **UNIVERGE BLUE CONNECT**
3. On the left-hand side, select **Users**
4. **Select** the user you would like to change
5. **Select** **UNIVERGE BLUE™ CONNECT**
6. **Select Voicemail**
7. Under voicemail notifications, **enter the new email**
8. Click **Save Changes**





Recording/Uploading Company Greetings

There are two ways to add a greeting for the Auto Attendant. (1) You can upload an already recorded sound file OR (2) record it through the phone

Recording and Uploading greetings from Control Panel:

1. **Record** and **save** your **greeting** using any **sound recording program** (through your computer or cell phone). We recommend downloading <https://www.audacityteam.org/download/>. The file must be in WAV or OGG format and cannot be larger than 16 MB.

2. Once recorded and saved in the above format,

3. Log in to the control panel

4. Click **Services**, and then **UNIVERGE BLUE™ CONNECT**



5. On the left-hand side, Click **Auto Attendant**

6. **Select** the **Auto Attendant** you would like to change (typically “Main auto-attendant” unless you have multiple companies)

<input type="checkbox"/>	Name	Number	Extension	Receptionist groups	Call routing override
<input type="checkbox"/>	Main Auto Attendant		300	Receptionist groups	Disabled

7. Select **Business Hours**



8. **Select** the **menu** you wish to change the greeting for (Working hours/After hours).

Business Hours are menus that contain call routing instructions and list. Drag a menu above another menu to ensure its schedule takes at any given time. After hours are defined as any time not covered

9. Under the menu options, **click** on the **current greeting** name

10. Select **choose file**, and **select** the **recording**

11. Enter a **file name**

12. **Agree with policies** and limitations

13. Click **Upload**.

Menu options

<input checked="" type="checkbox"/>	Dial by Extension enable
	Greeting greeting.ogg
1	AA: Auto Attendant voicemail
2	
3	
+	Sub-menu

Greeting

The greeting selected here will play whenever a call reaches this menu. Each level of menu and sub-menu may have their own greeting.

Choose options: Upload greeting

Upload file: **Choose File** No file chosen
.wav or .ogg file formats, 16 MB maximum

File name: Enter the name

I agree on Policy and limitations

Upload



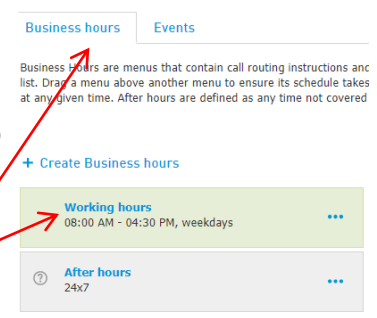
Recording Greetings through phone:

1. Log in to the control panel
2. Click **Services**, and then **UNIVERGE BLUE™ CONNECT**
3. On the left-hand side, Click **Auto Attendant**
4. Make note of what extension number is being used for the auto attendant you would like to record (typically, it's 300 unless you have multiple companies or your extensions are 300 series)



<input type="checkbox"/>	Name	Number	Extension	Receptionist groups
<input type="checkbox"/>	Main Auto Attendant		300	Receptionist groups

5. **Select the Auto Attendant** you would like to record (typically Main Auto Attendant unless you have multiple companies)
6. Select **Business Hours** or **Events**
7. **Select the menu** you would like to **change** the greeting for (Working hours/After hours).
8. Under the menu options, **click on the current greeting name**
9. Beside Choose options, click the drop-down and select Record greeting
10. You will be given the instructions for recording the greeting through the phone:
 - a. Dial Auto Attendant (the number you made note of in step 4 (typically 300))
 - b. When the message plays, Press *5
 - c. Enter PIN [as previously provided by NATG], followed by #
 - d. Follow the prompts
 - e. When prompted, enter the menu number you would like to record. This will be listed in these instructions



Edit Business hours
Utilize this section to edit basic information for this Business Hours menu. Please ensure the schedule is set for the times when this menu should rot

Name: Working hours
 Schedule: 08:00 AM — 04:30 PM, weekdays
 Status: Enabled

Menu options
 Dial by Extension enabled
 Greeting: greeting.ogg

Greeting [X]

The greeting selected here will play whenever a call reaches this menu. Each level of menu and sub-menu may have their own greeting.

Choose options: Record greeting

To record a greeting on this Auto Attendant:

- Dial your Auto Attendant.
- Press *5 during menu greeting.
- Enter PIN followed by `#`.
- Follow the prompts to record a greeting.
- > When prompted, enter menu number

If you do not know your PIN, please go to your [Auto Attendant's settings page](#).



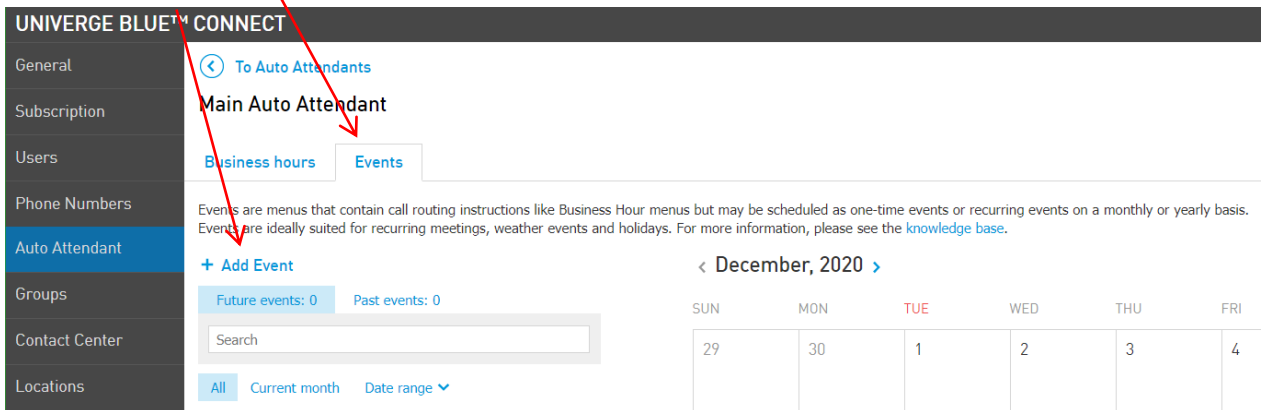
Creating Holiday/Closure Events:

1. Log in to the control panel
2. Click **Services**, and then **UNIVERGE BLUE™ CONNECT**
3. On the left-hand side, Click **Auto Attendant**
4. Select the Auto Attendant you would like to change (typically “Main auto-attendant” unless you have multiple companies)



<input type="checkbox"/>	Name	Number	Extension	Receptionist groups	Call routing override
<input type="checkbox"/>	Main Auto Attendant		300	Receptionist groups	Disabled

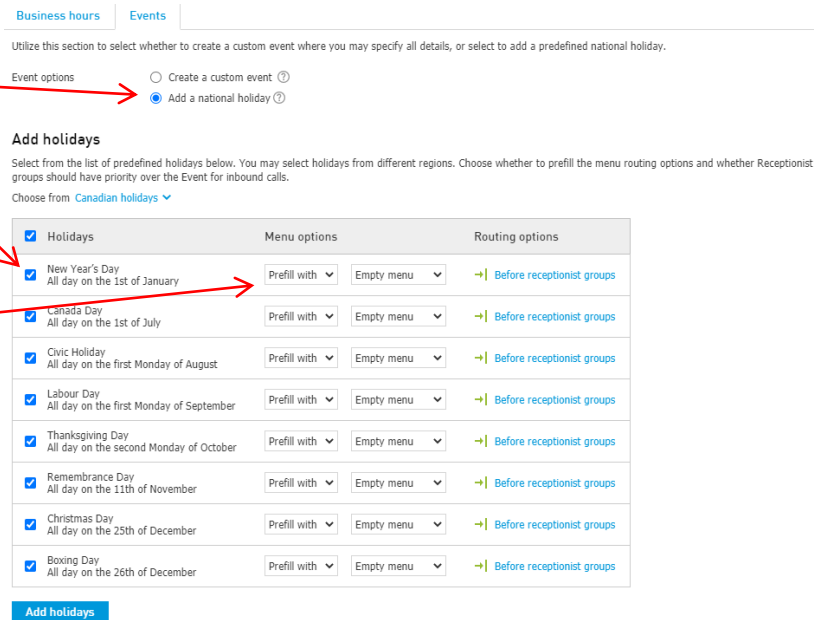
5. Click **Events**
6. Click on **Add Event**



7. Here you can choose between **Adding a National Holiday** or **Create a custom event**

a. **Add a National Holiday** gives you a quick choice of pre-determined dates.

1. Select **Add a national holiday**
2. Select which National Holidays you would like to schedule
3. Under Menu options, select whether you would like to **Prefill** - Creates a unique stand-alone menu. Save time by pre-populating the new menu's routing options and greeting with those from an existing menu. This would be used if you would like a custom greeting like “we are currently closed for the “Christmas” holiday” **OR**



Link to an existing menu -

Linked menus share all routing options and greetings but may have a unique schedule. Useful when you would like your after-hours message to play during this event.

4. Click **Add holidays**
5. You will now see the created event. If you have chosen to “Prefill the menu” you will need to upload a greeting. See Recording and Uploading Greetings for instructions.



b. **Create a custom event** that allows you to set up your own events (ex. Staff events, extra date closures for Christmas, etc.)

- i. Select **Create a custom event**
- ii. Enter the event name
- iii. Next to Schedule, select **Not set up**
- iv. You will receive a new pop up, Enter the date
- v. Select if you would like the event to play all day or during a specific time (ex. 12pm – 5pm)
- vi. Click Save Changes or Cancel
- vii. Beside Menu options, select whether you would like to: **Create a new menu** - Creates a unique stand-alone menu. Save time by pre-populating the new menu's routing options and greeting with those from an existing menu. This would be used if you would like a custom greeting like “we are currently closed for the “Christmas” holiday” OR **Link to an existing menu** - Linked menus share all routing options and greetings but may have a unique schedule. Useful when you would like your after-hours message to play during this event.
- viii. Click **Next**
 - i. You will now see the created event. If you have chosen to “Create a new menu” you will need to upload a greeting. See Recording and Uploading Greetings for instructions.

Once the Event is created, it will automatically override the usual schedule during the specified timeframe. Events will always be prioritized over the usual Menus. For receptionist groups, there is a specific setting called **Routing Option**. You can choose whether to set the Events before or after the Receptionist group. It can be found under the settings of a specific event.

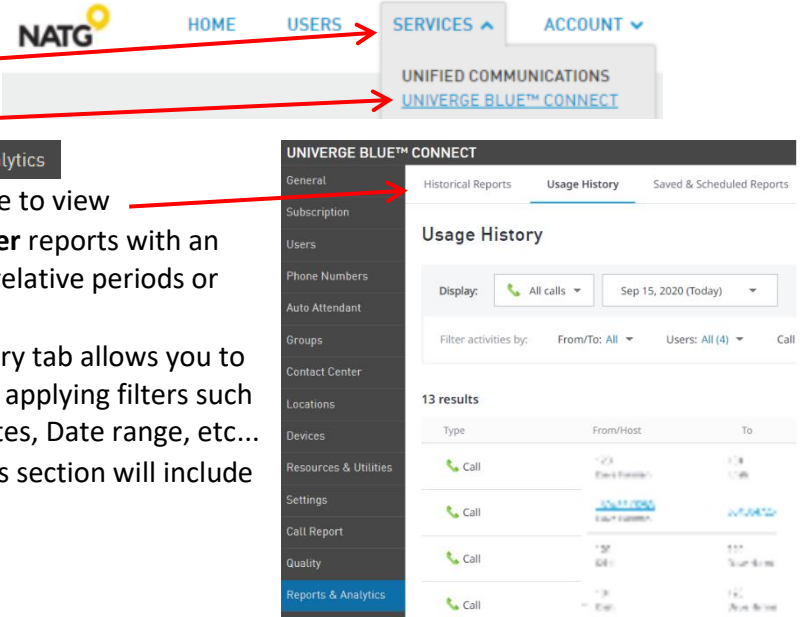
NOTE: If the Event is set before the Receptionist group, inbound calls are routed directly to the menu and are further routed depending on the Timeout settings of the Event;

If the Event is set after the receptionist group, inbound calls first go to the receptionist groups according to the usual schedule and then go to the Event.



Running Reports

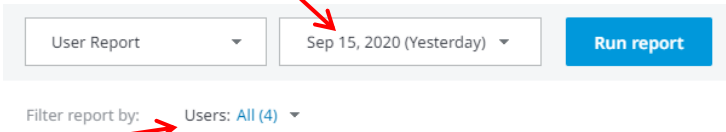
1. Log in to Control Panel
2. Select Services
3. Select UNIVERGE BLUE CONNECT
4. On the left-hand side, select **Reports & Analytics**
5. Select the type of report you would like to view
 - a. Historical Reports - Includes **User** reports with an ability to choose the following relative periods or select a custom range.
 - b. Usage History - The usage History tab allows you to create a specified call report by applying filters such as: From/To, Users, Call attributes, Date range, etc...
 - c. Saved & Searched Reports - This section will include your saved reports



Historical Reports

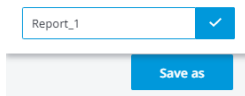
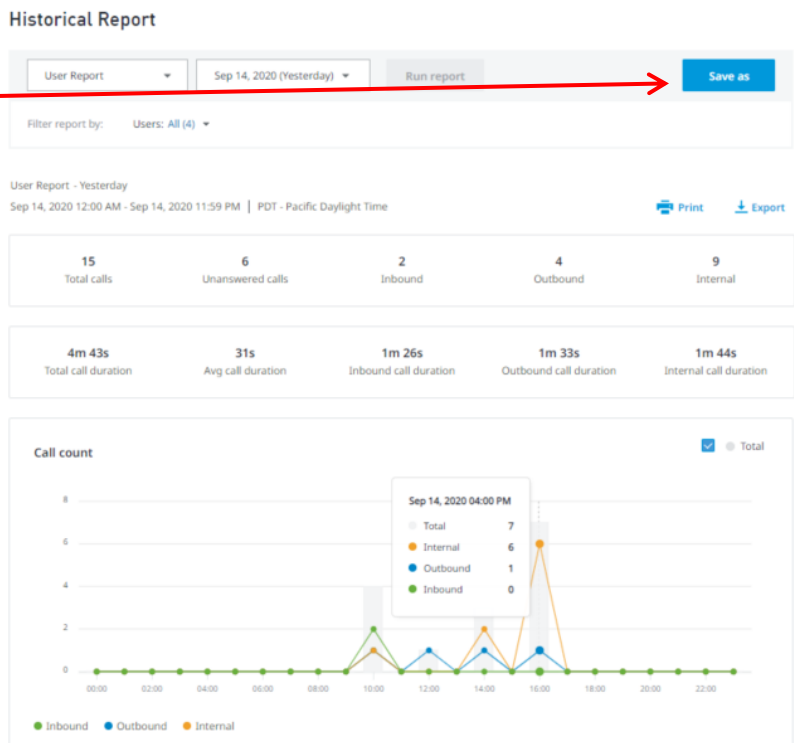
Includes User reports with an ability to choose the following relative periods or a custom range.

- Select Historical Reports
- Select the dropdown for the date range and enter the preferred range
- Click **Run report**
- The report will initially include all users by default, you can change the selection by using the **Users filter** and select the name(s) you would like to run the report on
- This report includes the number and duration of the following types of calls:



Total calls / Unanswered / Inbound / Outbound / Internal

- Each report can be saved by clicking Save as button in the right upper corner (after the report is run). After you name the report it will appear in the Saved & Scheduled Reports section.

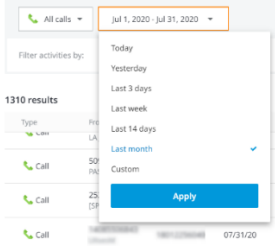




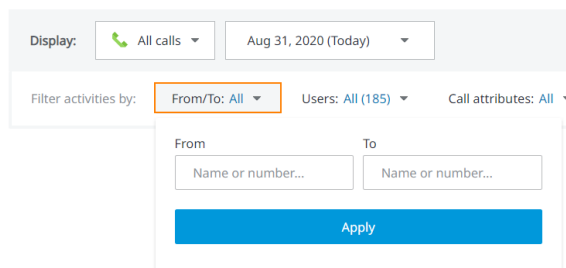
Usage History

Usage History tab allows you to create a specified call report by applying filters as such: Type; From/Host; To; Date; Start Time; Duration; Group — the Hunt Group (if any) through which the user has received the call; Direction — internal or external call

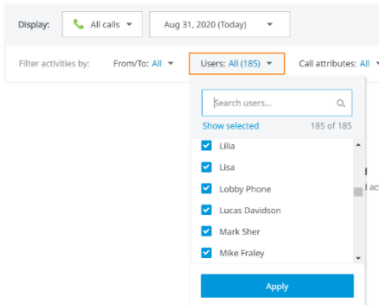
- **Select Date or a date range;**



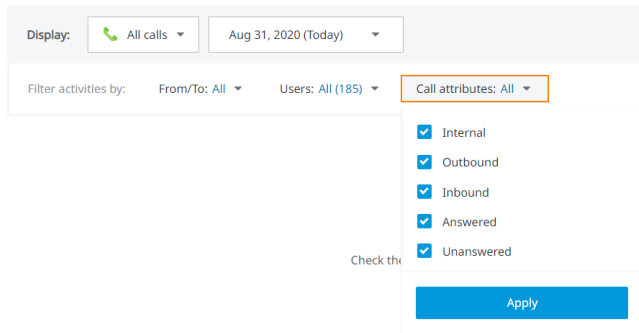
- **From/To:** allows you to input a name or number of a caller or a callee;



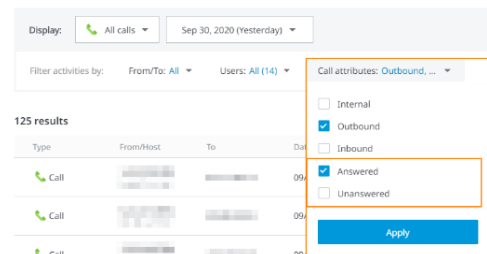
- **Users:** Allows you to select users who have received or made a call;



- **Call attributes:** allows you to filter internal, outbound, inbound, answered, and unanswered calls;



- **Important:** Internal, outbound, and inbound attributes cannot be selected on their own. Either Answered or Unanswered needs to be selected as well. Selecting All in Call attributes will show no results





- Your report will then be generated

Usage History

Display: All calls Jul 1, 2020 - Jul 31, 2020 Save as report

Filter activities by: From/To: All Users: All (185) Call attributes: All

1,312 results Export to .CSV

Type	From/Host	To	Date	Start Time	Duration	Group	Direction
Call			07/31/20	08:50 PM	8m 55s		Inbound

- Once the report is created, you can save it by clicking **Save as report** button and choosing the name of the report. After you save it, the report will appear in the *Saved & Scheduled Reports* tab.

Historical Reports Usage History Saved & Scheduled Reports

Usage History

Display: All calls Aug 17, 2020 - Aug 31, 2020

Give a Report name... Save as report

Saved & Scheduled Reports

This section will include your saved reports.

- You can **view** the report by **clicking its name**.
- For each report, you can **Add Schedule** (to send it automatically to an email), **Edit the name**, or **Delete** the Report (options under Reports actions)

Report Name	Schedule Frequency	Report Category	Report Type	Last Saved	
Report_1	None	User Report		06/03/20 11:23 AM	Add schedule Report actions

- When you click **Add Schedule**, you should specify the delivery details:

- Frequency: Daily, Weekly, or Monthly
- Day (only available for Weekly and Monthly frequencies)
- Time
- Email address(es)

Schedule Report

Delivery details

Frequency: Daily Day: Every day Time: 06:00 AM

File type: CSV Recipients' language: English (United States)

Send by: Email Send to: Enter email address

[+ Add recipient](#)

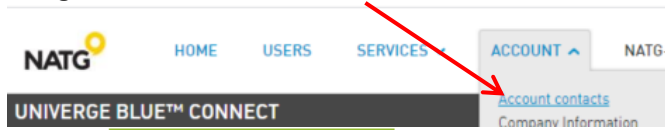
Save changes Cancel

- After you saved the Schedule for the report, you can **Edit** or **Remove** it (options under **Schedule actions**).



Adding users to Control Panel login

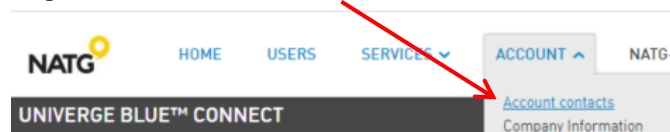
1. Log in to Control Panel
2. Navigate to *Account > Account Contacts*.




3. Click on **+ Create account contact**
4. Fill in information
5. Select the Roles you would like the employee to have access to
6. Click **Create contact**

Resetting Control Panel login password

1. Log in to Control Panel
2. Navigate to *Account > Account Contacts*.



3. Click on the **Contact Name** of the Administrator you would like to reset the password for.
4. Under the **General** tab, navigate to Password and enter  Password
Confirm password
5. Select **Reset password at next login** to have employee enter their password their next login
6. Click **Save changes**

