Contact Center + Univerge Blue Desktop App

Contact Center has now been integrated with Univerge Blue Desktop App, making it easier for agents to conduct their jobs.

This document provides instruction for how to install and run the version of Univerge Blue Connect that is integrated with Contact Center. It also provides a brief description of how Contact Center works in Univerge Blue Connect and ends with a list of known issues.

IMPORTANT:

1) We welcome your feedback! Please provide feedback using the form found at the following link: https://app.smartsheet.com/b/form/2ee9959573304fd9a81ba30161380948
2) While Contact Center in Univerge Blue Desktop App works for both Softphone and Call controller modes, Contact Center is best experienced in Softphone mode.
3) Contact Center in Univerge Blue Desktop App works **ONLY** for the desktop version of Univerge Blue Connect, not for Univerge Blue Connect Mobile.
4) We **DO NOT** recommend using hard phone controls aside from answering and hanging up, i.e., do not use the hard phone controls for transferring or parking calls, or for conferencing in.
5) When a Contact Call is presented, all registered devices for that user's phone number will ring.
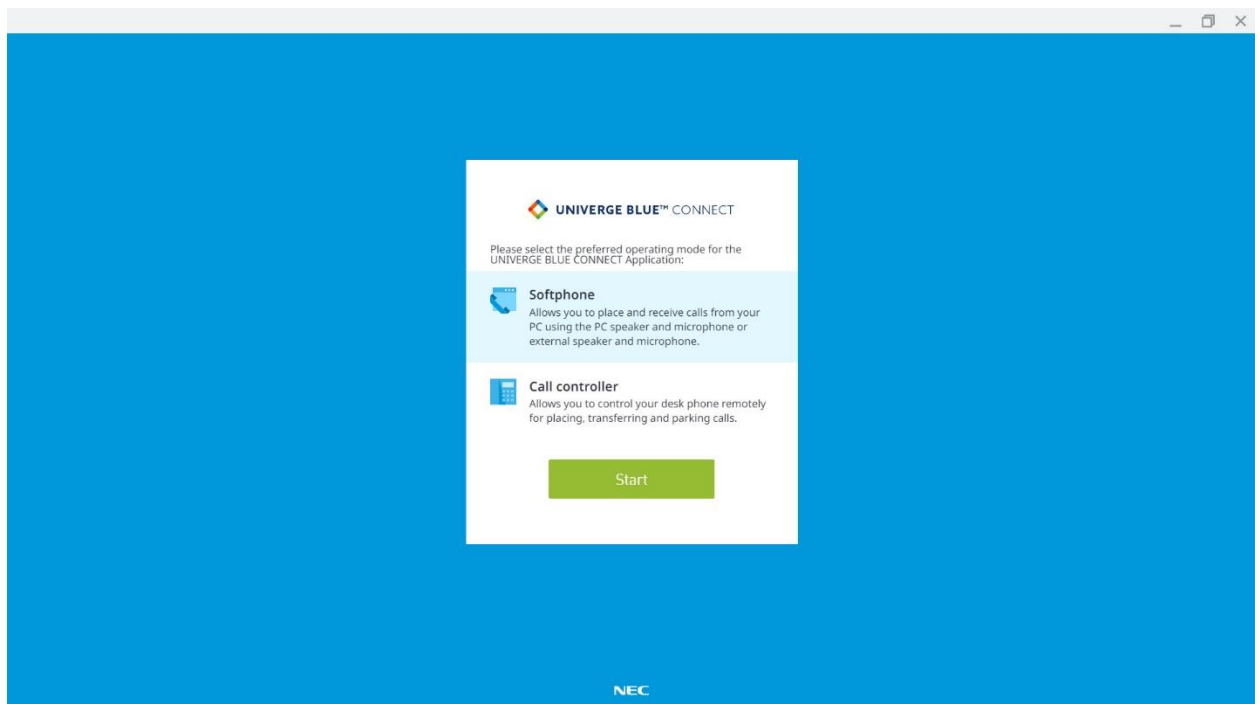
Installing Contact Center + Univerge Blue Desktop App

To install and run the software

1. Download the file you were provided and extract it.
2. Run the executable **UNIVERGE BLUE CONNECT.exe**
3. Login using the credentials you received. The initial screen should look as follows:
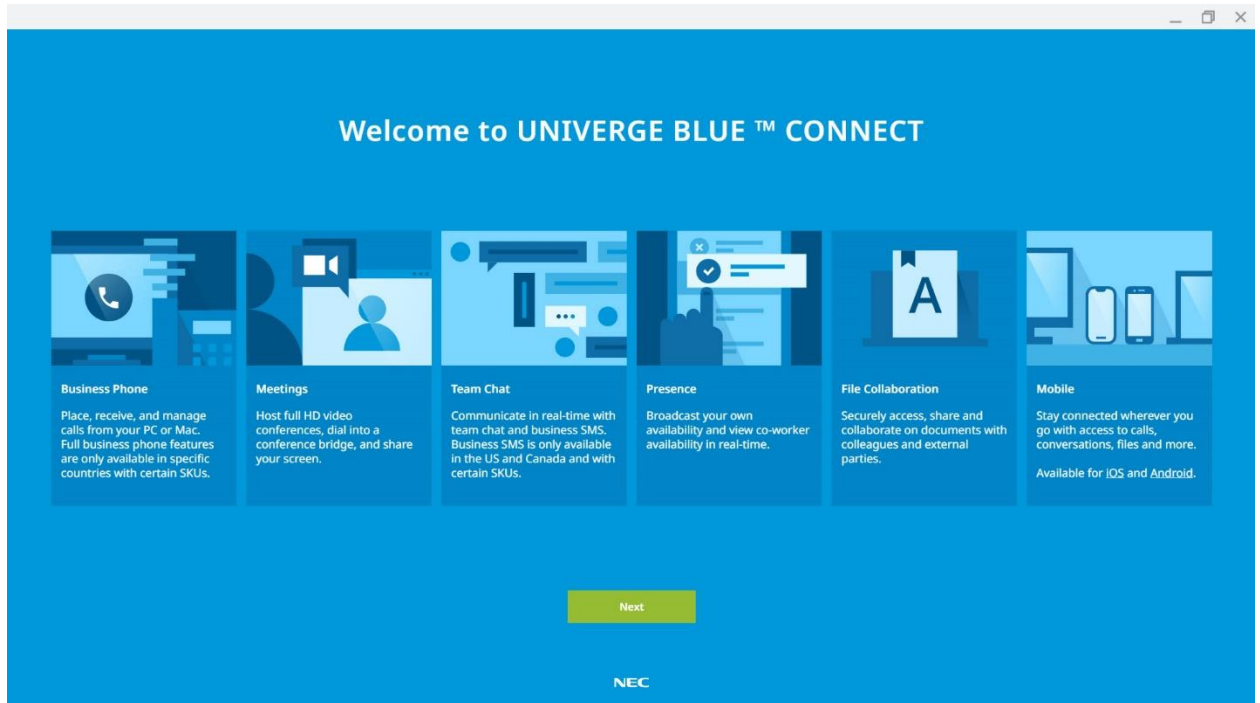
4. Click **Next** to choose the operating mode. For the best experience, click **Softphone**.

5. Click **Start** to proceed. A message should appear at the top of the screen to prompt you to install an update. Click **Install Update**. Univerge Blue Desktop App should restart after a few minutes.
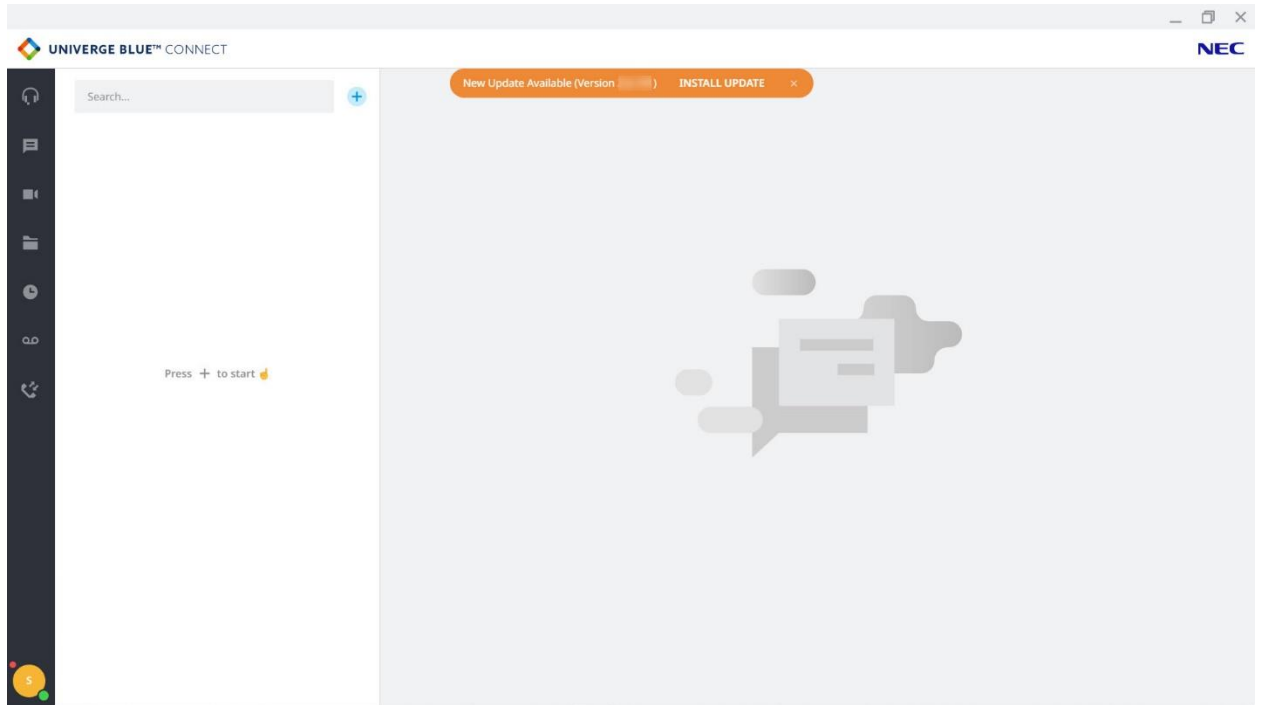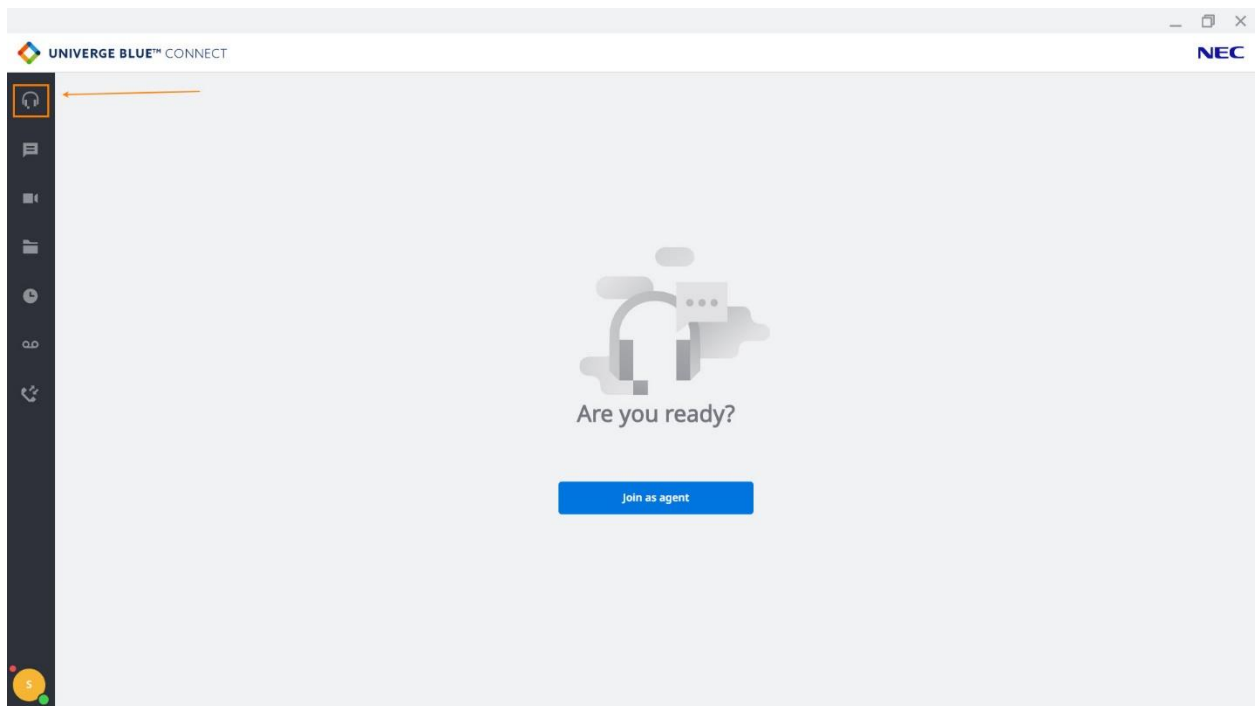
You can now proceed to the section Using Contact Center in Univerge Blue Desktop App.

Using Contact Center in Univerge Blue Desktop App

Contact Center in Univerge Blue Desktop App does not differ much in functionality from the desktop version you are used to. This section highlights the features.

To start Contact Center in Univerge Blue Desktop App

1. Login as you normally would.

2. Click the **Headsets** icon. The main screen changes to allow you to access Contact Center as an agent.

3. Click **Join as agent** to begin. The new Contact Center integrated screen appears.

UNIVERGE BLUE™ CONNECT   NEC

Go available   ● Not ready   00:06⌄

Queues   My stats   ☎ Dial out

                    6   0
              Total Queues   Queues exceeding wait threshold

        Global Total Service Level   0%   Longest Wait: 0s   Queue:
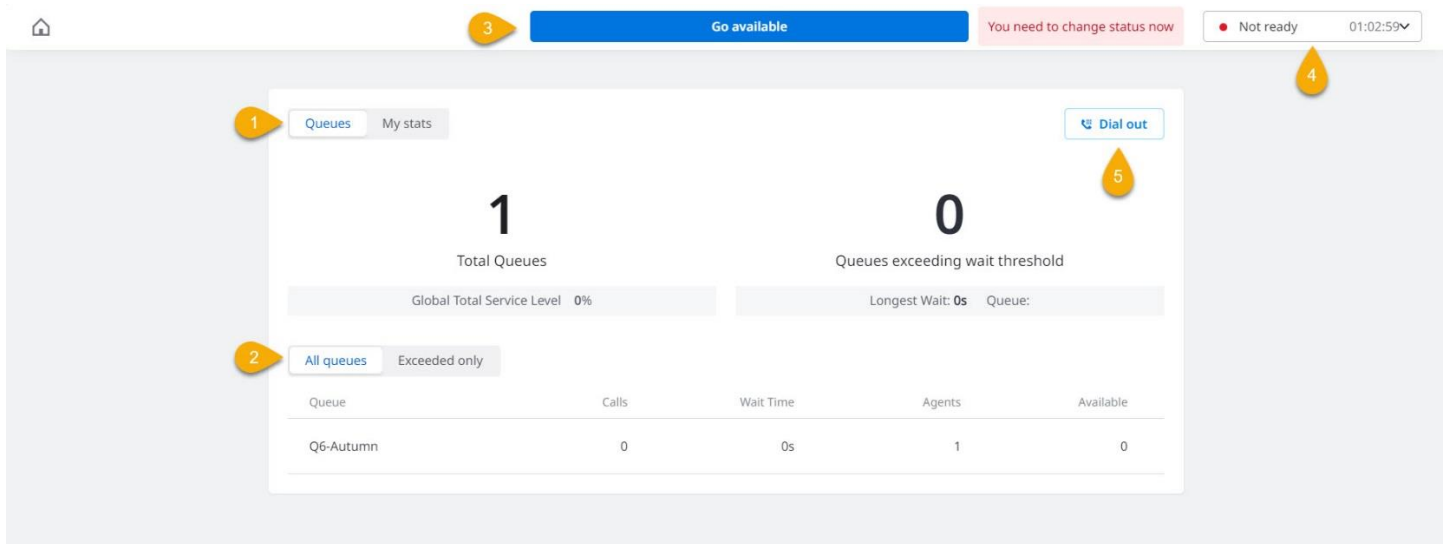
All queues   Exceeded only

Queue	Calls	Wait Time	Agents	Available
Customer Service	0	0s	1	0
Default chat queue	0	0s	1	0
Q1 Spring	0	0s	1	0

Highlights of Contact Center in Univerge Blue Desktop App

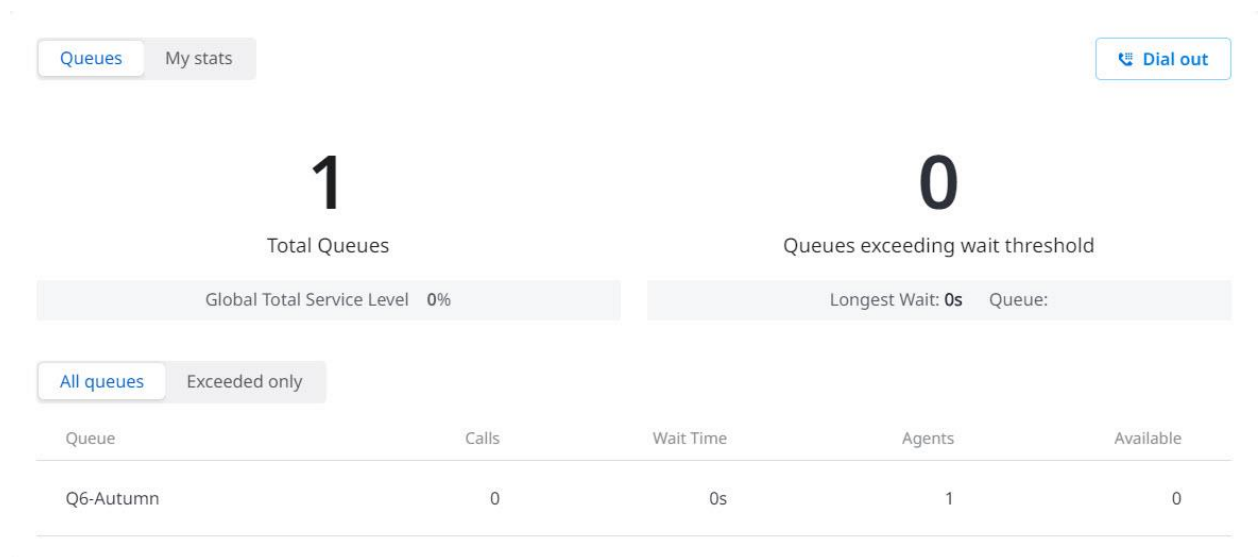This section describes the main elements of the new feature and provides Use Cases.

Main Interface Elements

The following are the elements found in the main interface.

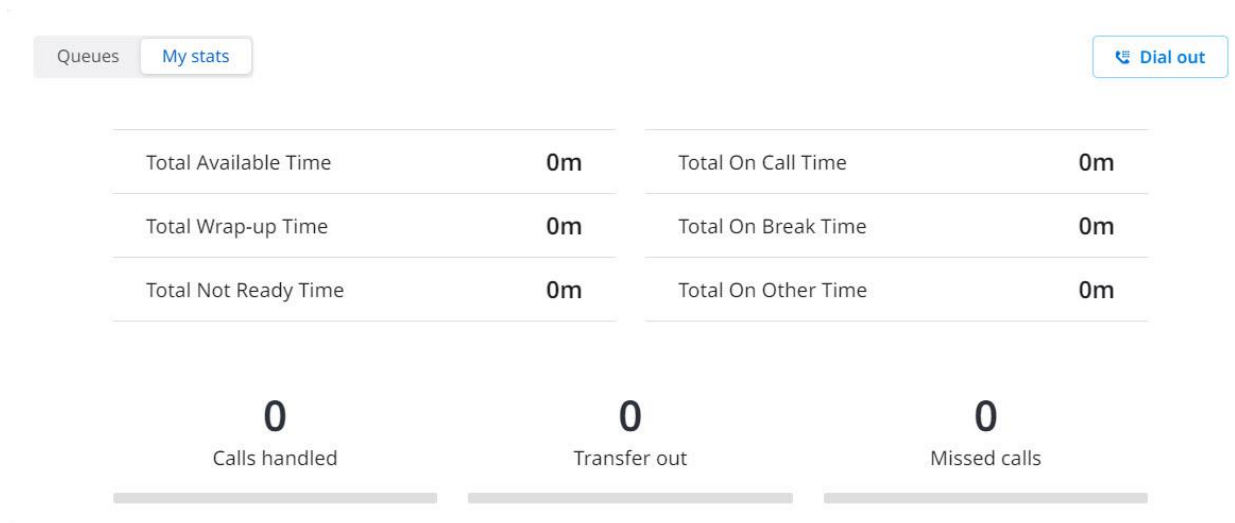1) **Queues/My Stats:** Click to select your view.
   a. **Queues** shows the total number of queues on hold as well as the number of queues that have exceeded the wait threshold.


   b. **My Stats** shows you the amount of time you have spent in various Statuses and the number of calls you have handled, transferred out, or missed.

2) **All queues/Exceeded only:** When in the **Queues** view, click to show all queues waiting for an agent, or show only the queues that have exceeded the waiting threshold.

3) **Go Available:** Click to change your Status to **Available**. If you have spent too long not switching to Available, a warning appears to urge to switch your Status to **Available**.
   a. The **Go Available** button changes to Go on break when your current Status is other than **Available**.
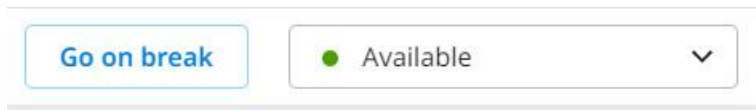
4) **Status menu:** Click to expand the menu and choose a Status. The Status menu also shows how long you have been in the current Status.
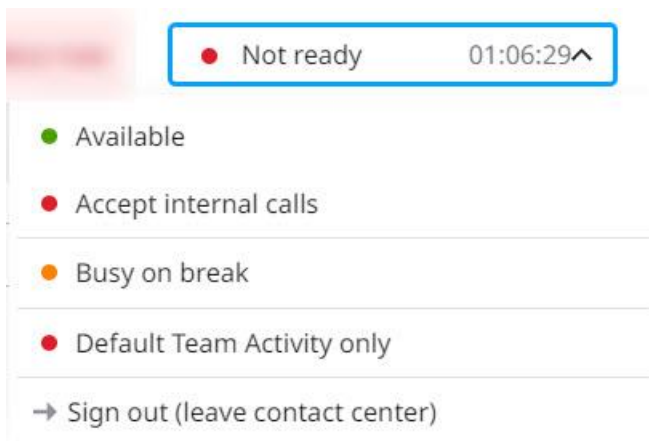

5) **Dial out:** Click to carry out an external call. The screen changes to present you the options for dialing out.
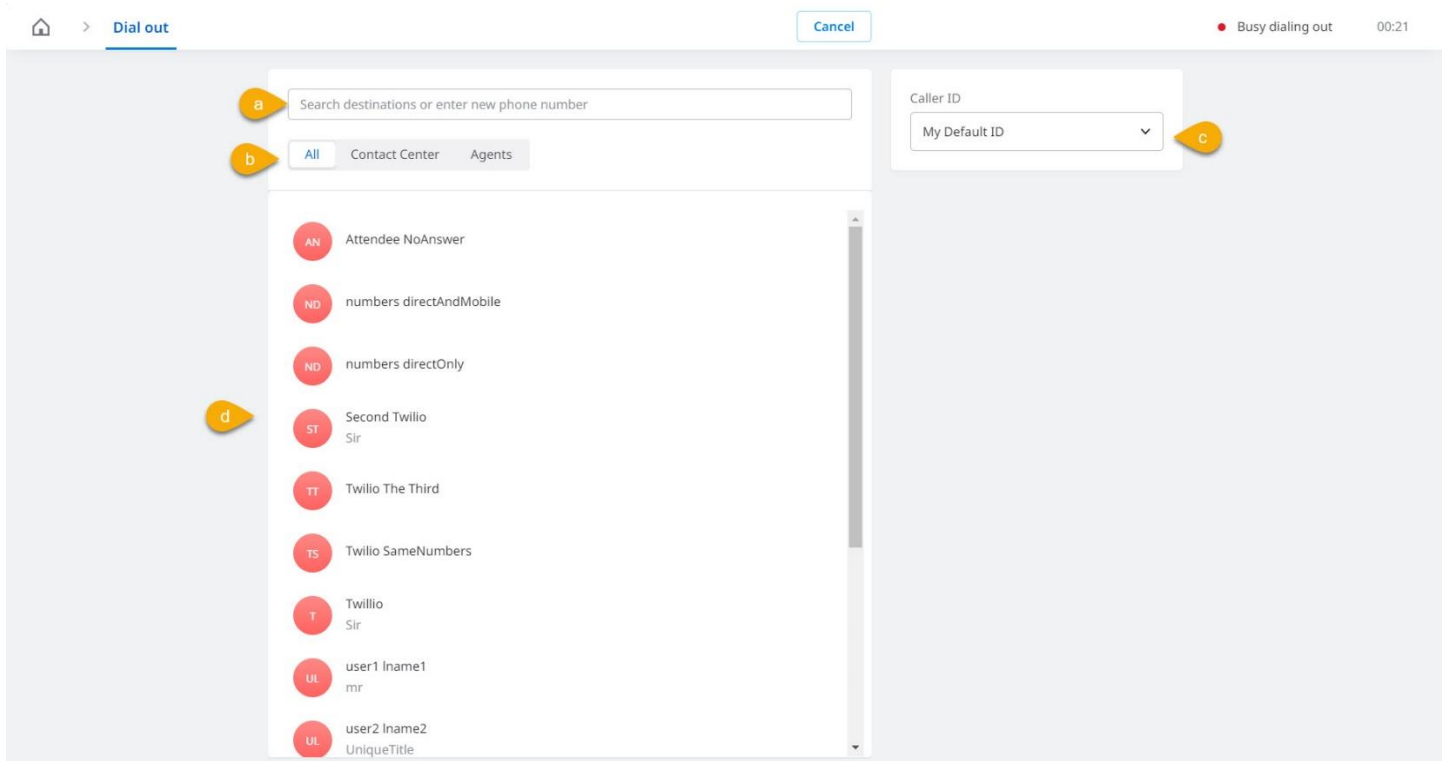
a. **Search bar:** Type to search for a destination or enter a phone number not listed here.
   - As you type an existing destination, the list in **d.** narrows down to matching entries, only.
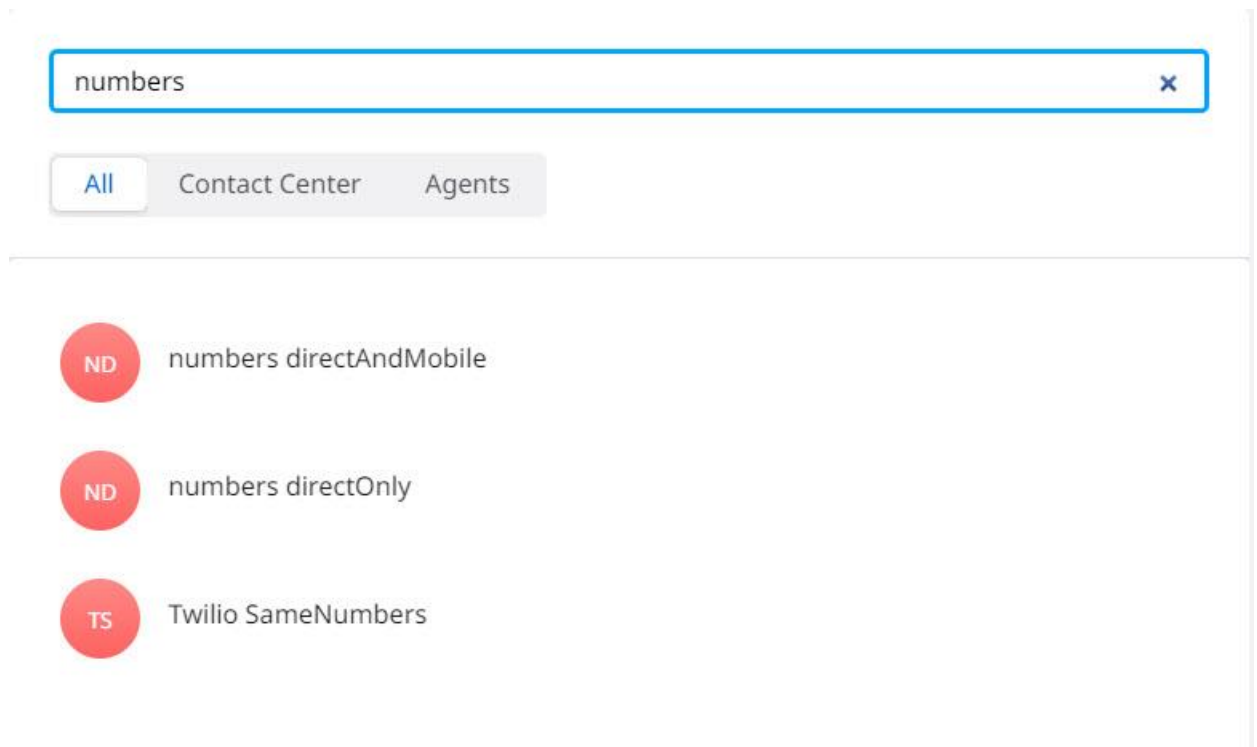
(1) Select the destination you want. The screen changes to show you the number that will be dialed out when you click **Make call**.
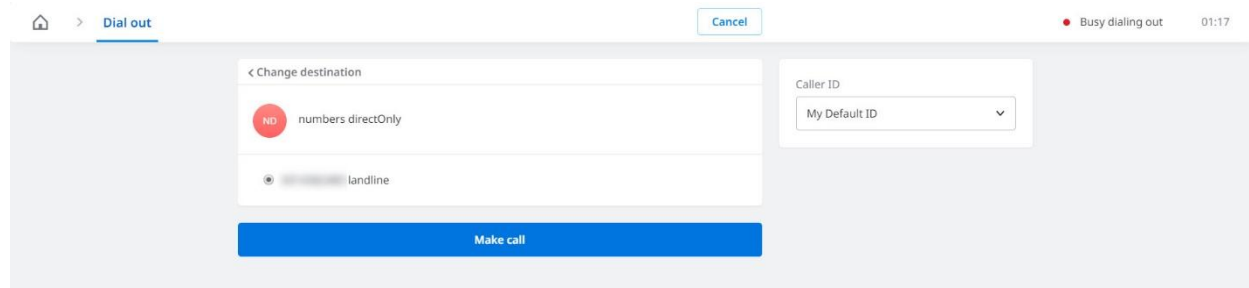
- If you type a number that doesn't exist, the list in d. changes to show you the number you typed.

(1) Select the number. The screen changes to show you the number that will be dialed out when you click **Make call.**
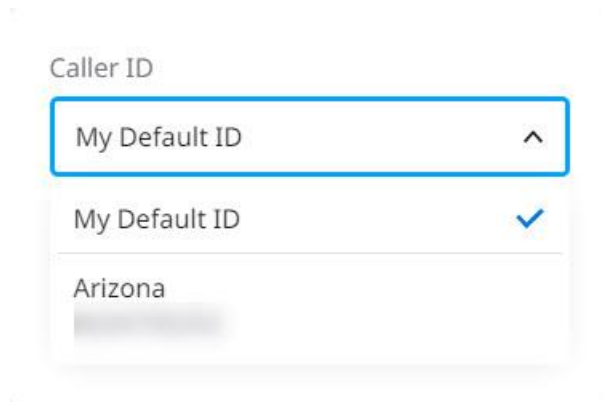

b. **All/Contact Center/Agents:** Click to display a list of all numbers, or to filter by the entries in the Contact Center Phonebook or by agent name.
FMI: For more information about the Contact Center Phonebook, see UNIVERGE BLUE™ ENGAGE Phonebook

c. **Caller ID:** Click to expand the menu and choose the Caller ID you want the recipient to see on their display.

d. List of numbers available for dialing out, sorted by the button you selected in **b.** (All, Contact Center, or Agents).
    *   When you select the number to call, the screen changes to show you the number that will be dialed out when you click **Make call**.
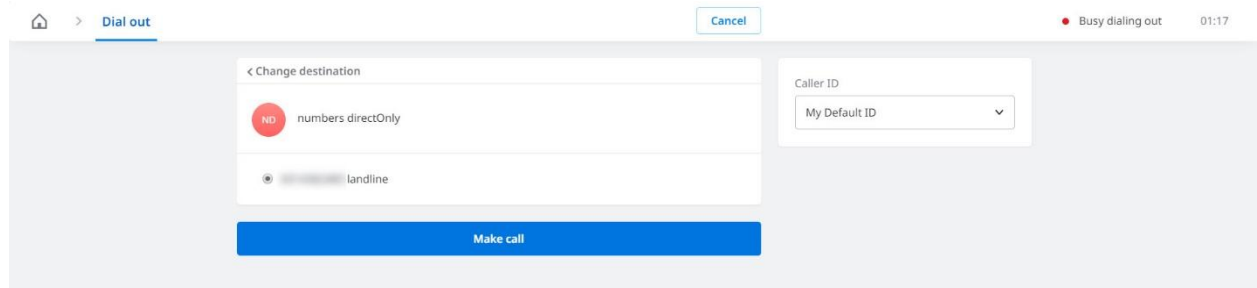
Use Cases

The following describes various scenarios you might encounter while using Contact Center with Univerge Blue Desktop Chat.

1) **Call in Queue**

   When a call comes in and is placed in a queue to wait for an agent to respond, the **Queues** area changes to reflect the name of the queue, the number of calls waiting in that queue, the number of agents assigned to that queue, and the number of agents available to take a call from the queue.
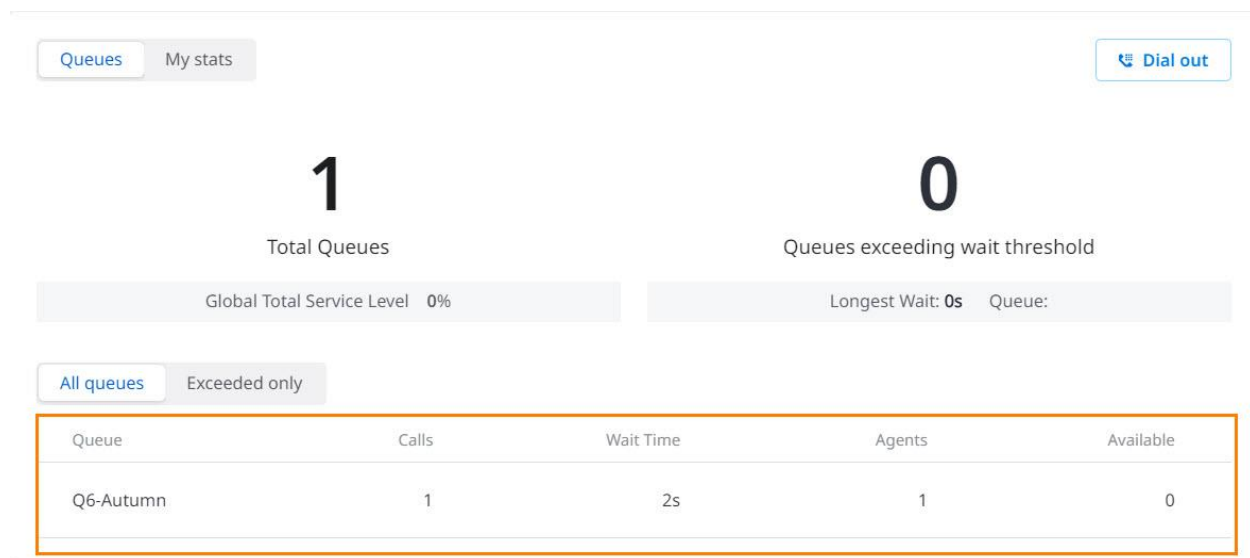
2) **Call in Queue Exceeded Wait Time Threshold**

   When a call in queue has exceeded the waiting time threshold set up for the queue in Contact Center Admin Portal, **Wait Time** changes to red, as does the **Queues exceeding wait threshold**. The screen also shows how many queues have exceeded the wait time threshold, the amount of time that the *longest* waiting queue has been on hold and its name.
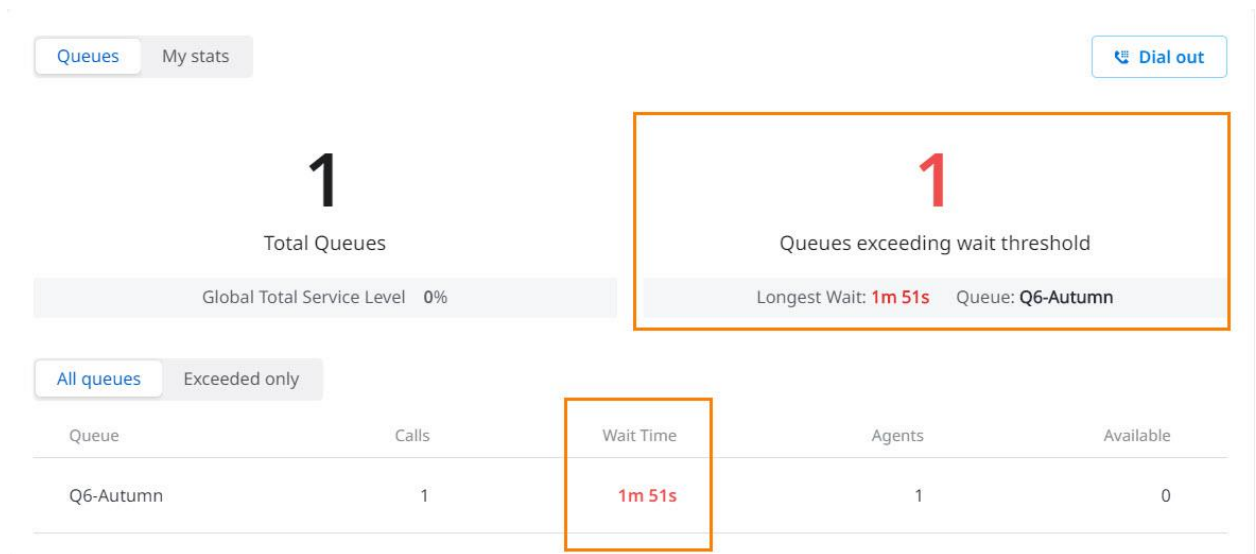
Changing to the Exceeded only tab will filter queues by the ones that have exceeded the wait time threshold, with the ones that have been waiting the longest at the top of the list.
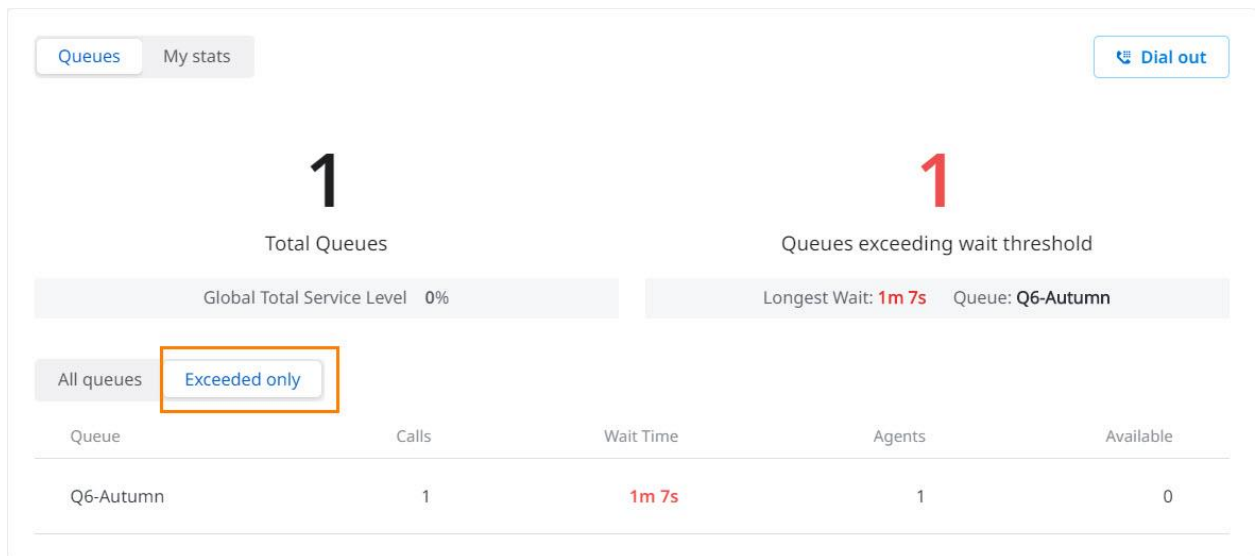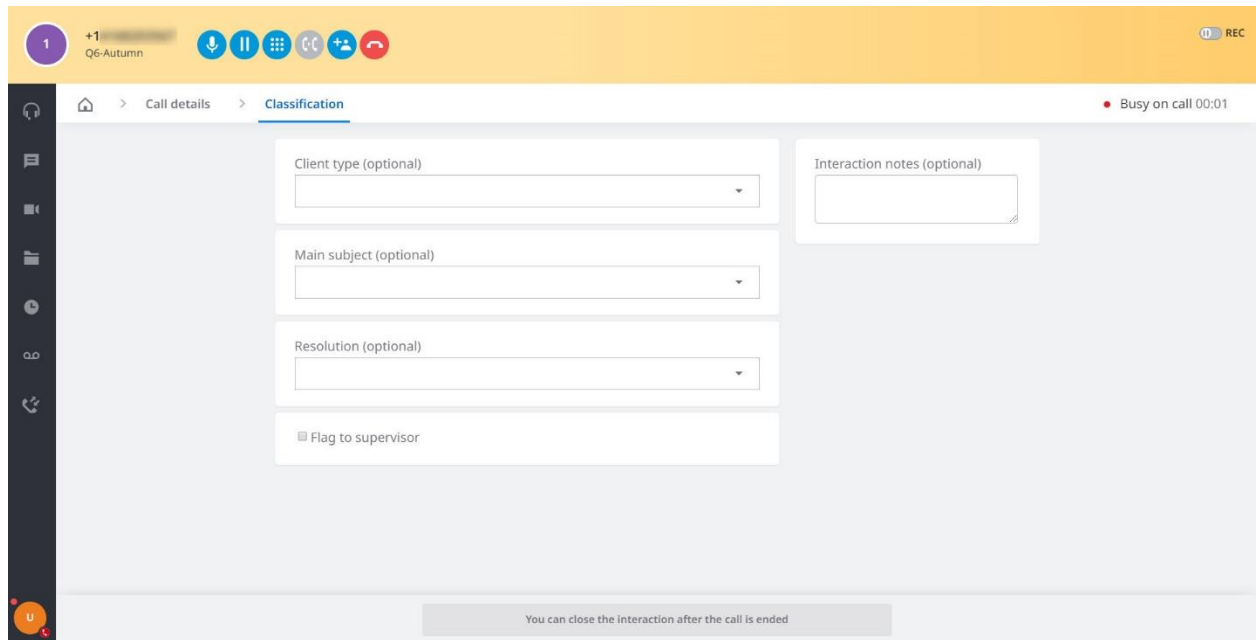

3) **Agent Available to take Call**
   a. When a call comes in and the agent is available to take the call, the bar at the top of the screen changes to orange to signal to the agent that the incoming call is a Contact Center call.
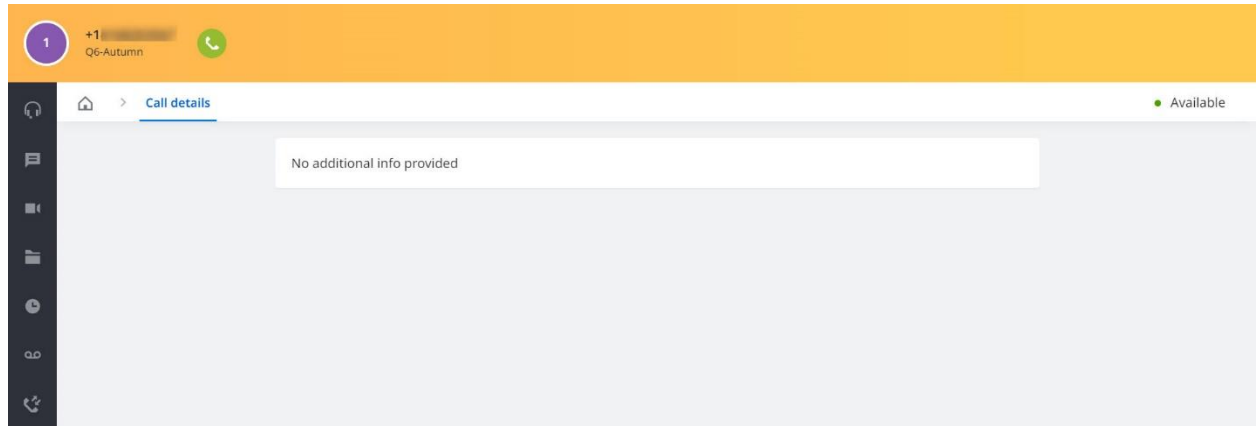
b. When the agent answers the call, the orange bar changes to a softer shade of orange to indicate the agent is on a call.

c. If a queue has been set up to allow the agent to record a call, a **Rec** button appears on the orange bar. The agent can then choose to turn on the recording.

d. Any information that exists pertaining the call is displayed in the **Call details** tab.

e. You can enter **Classification** details while on the call, or you can wait until the call completes to fill in the details.

NOTE: The bar at the bottom turns to blue only after all required information has been entered. If all the information is optional, the bar at the bottom turns to blue immediately after you disconnect the call. Otherwise, the bar will appear gray.

4) **Interacting within Contact Center workstream**
   While on a *Contact Center* call, the agent can add other calls or transfer the call by pressing the buttons on the **orange bar**.
   a. **Adding a call**
      i. Press the button to add a call.
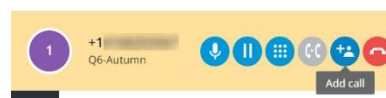
ii. Search for the Contact Center, IVR, Agent, or Company to add to the call.
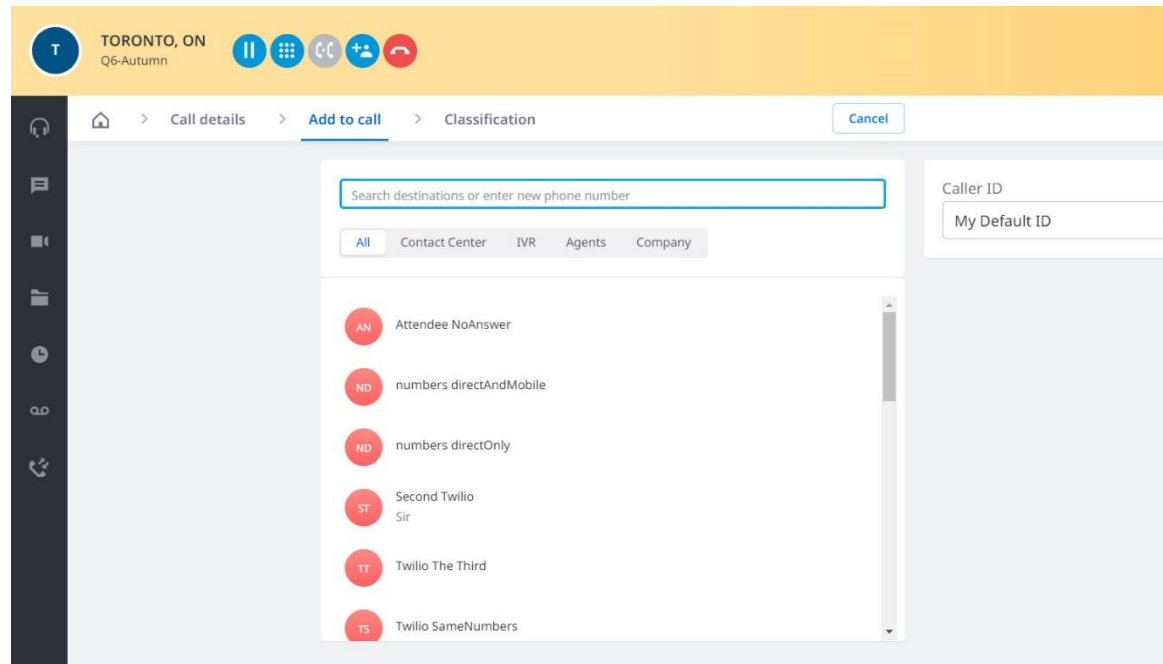
b. **Transferring a Call**
   i. Press the button to transfer the call.

   ii. Search for the Contact Center, IVR, Agent, or Company to transfer the call to.
   iii. Select the user. The screen changes to present options for making a **Cold transfe**r or a **Warm transfer**.

1. If you select **Cold transfer**, click the **Transfer and hang up button** to transfer the call. The Contact Center call disconnects.
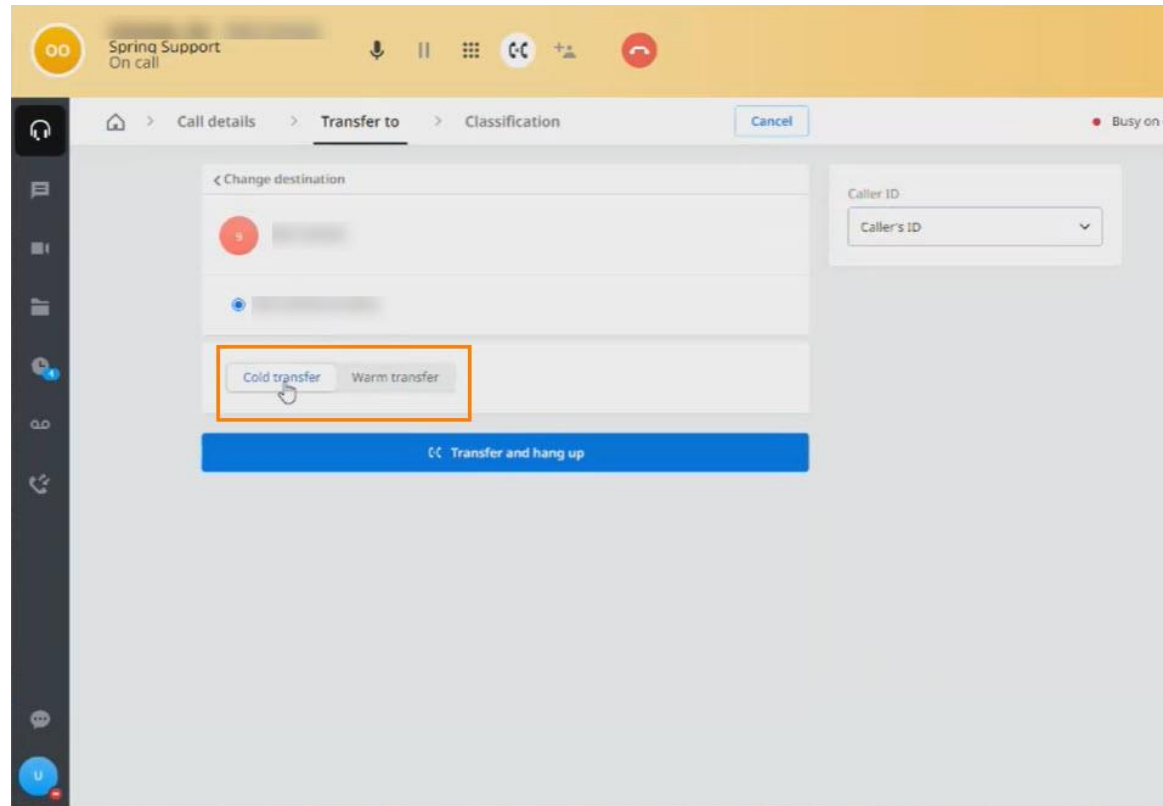2. If you select **Warm transfer**, the button changes to **Begin transfer**. Click the button to dial the number to which you are transferring the call. When that number picks up, the call bar changes to show both calls, with the Contact Center call in grey, and the second caller in yellow. You can interact with the second caller, but you cannot switch back to the original Contact Center call. To complete the transfer, click the **Complete Transfer** button. Both calls then disconnect.
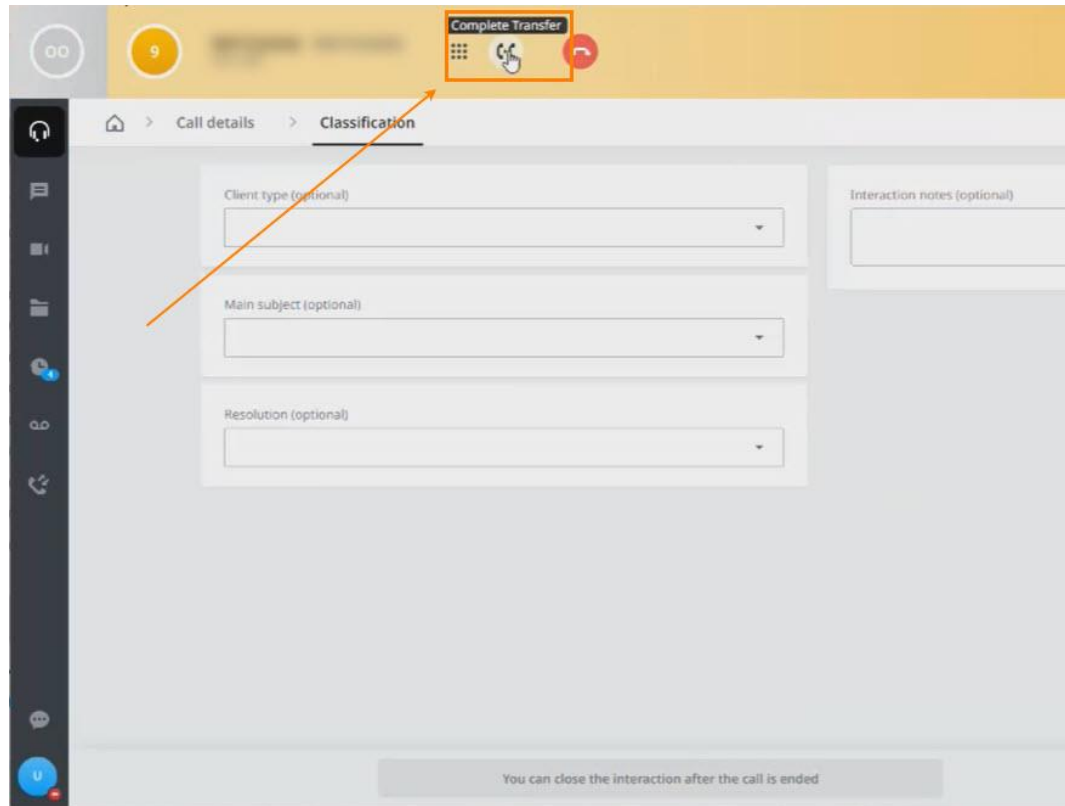
5) **Interacting outside the Contact Center workstream**
While on a *Contact Center* call, the agent can interact with callers *outside* the Contact Center workstream.
   a. **Joining a meeting while on a Contact Center call**
   When an Agent is in a Contact Center call, they can join one or more meetings, and their audio will be split among the various channels. However, the caller and the people in the meetings will not be able to hear each other. In order to have the Contact Center caller join a meeting, the Agent can use the Contact Center **Conference** feature, followed by the **Keypad** feature to enter the meeting's ID.

   b. **Chatting while on a Contact Center call**
   The agent can continue using Univerge Blue Desktop as usual while on a Contact Center call. To chat with another person in the company, pressing the chat button will not disconnect the Contact Center call.
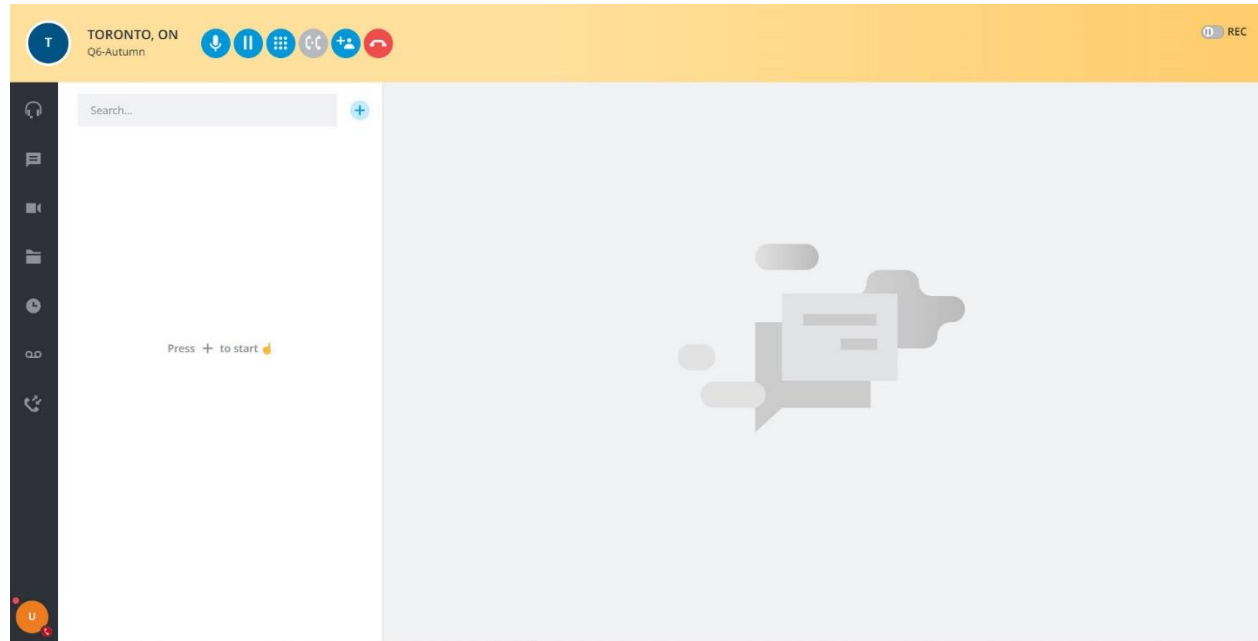
c. **Calling while on a Contact Center call**
   The agent can continue using Univerge Blue Desktop as usual while on a Contact Center call. To chat with another person in the company, pressing the chat button will not disconnect the Contact Center call.
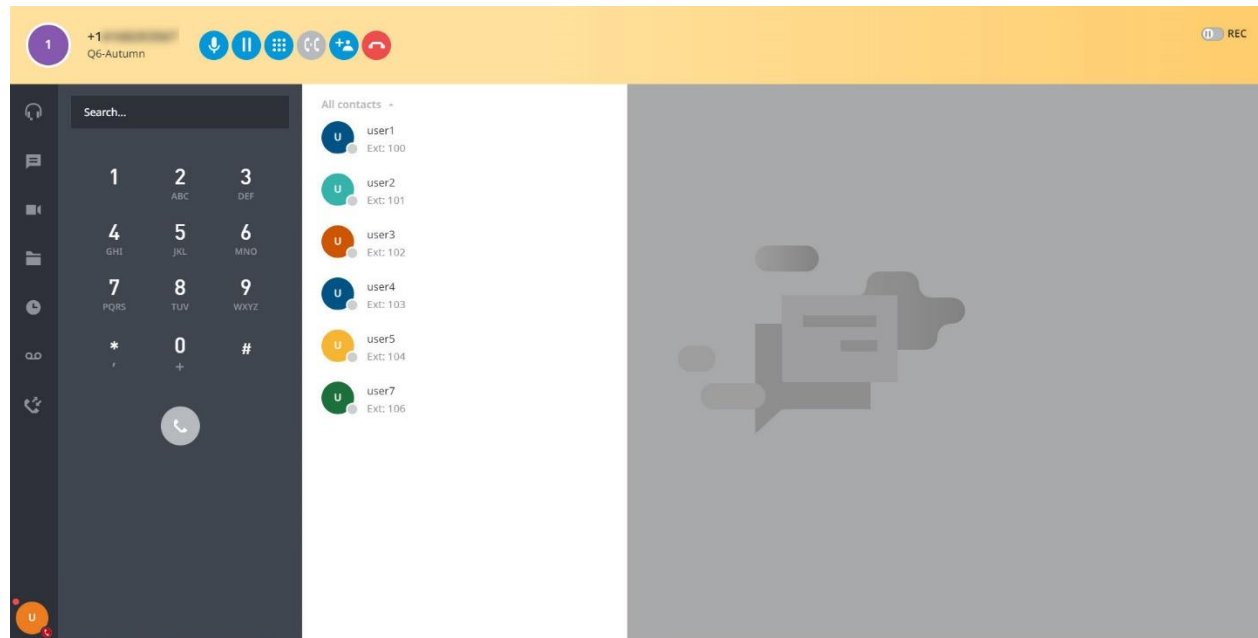
Two bars appear at the top: the orange bar for the Contact Center workstream, and a blue bar for the call outside the Contact Center workstream. The Contact Center call automatically goes on hold.

NOTE: The two calls **WILL NOT** join. The caller on the Contact Center workstream call will have no awareness of the caller on the outside workstream, and vice versa. If you want to add a caller to the Contact Center workstream, you **MUST** use the buttons on the orange bar, as explained above.

Presences Sync

An important feature of the integration between Univerge Blue Connect and Contact Center is Presence synchronization. In Univerge Blue Connect, Agents can signal their Presence to other Univerge Blue Connect users. Contact Center provides the ability to indicate the Agent's Status. Through the integration, Agents can control their Status using Contact Center without having to worry about also controlling their Presence using Univerge Blue Connect. In other words, changes to the Agent's Status in Contact Center will be synchronized to their Univerge Blue Connect Presence.

Here's how it works.

1) **Agent logs on to Univerge Blue Connect, but does not join Contact Center**
   The Agent controls their Presence in Univerge Blue Connect, as normal.
   a. From the lower left corner
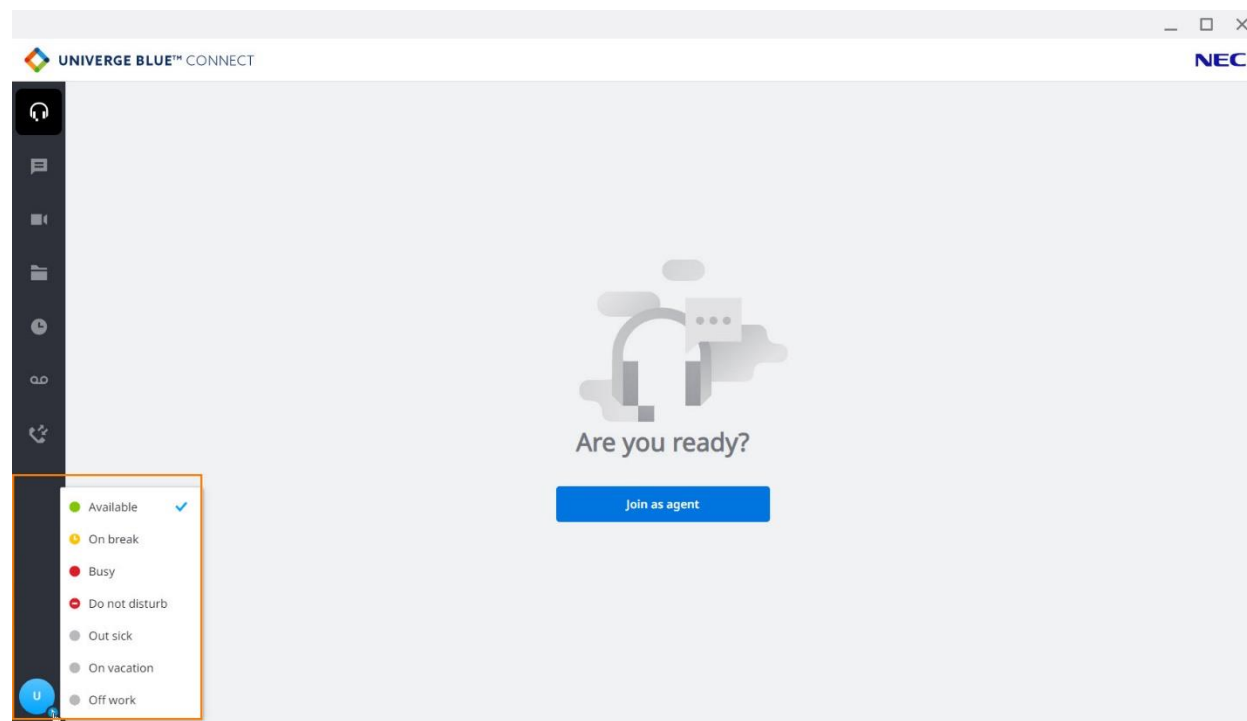
   b. From their profile
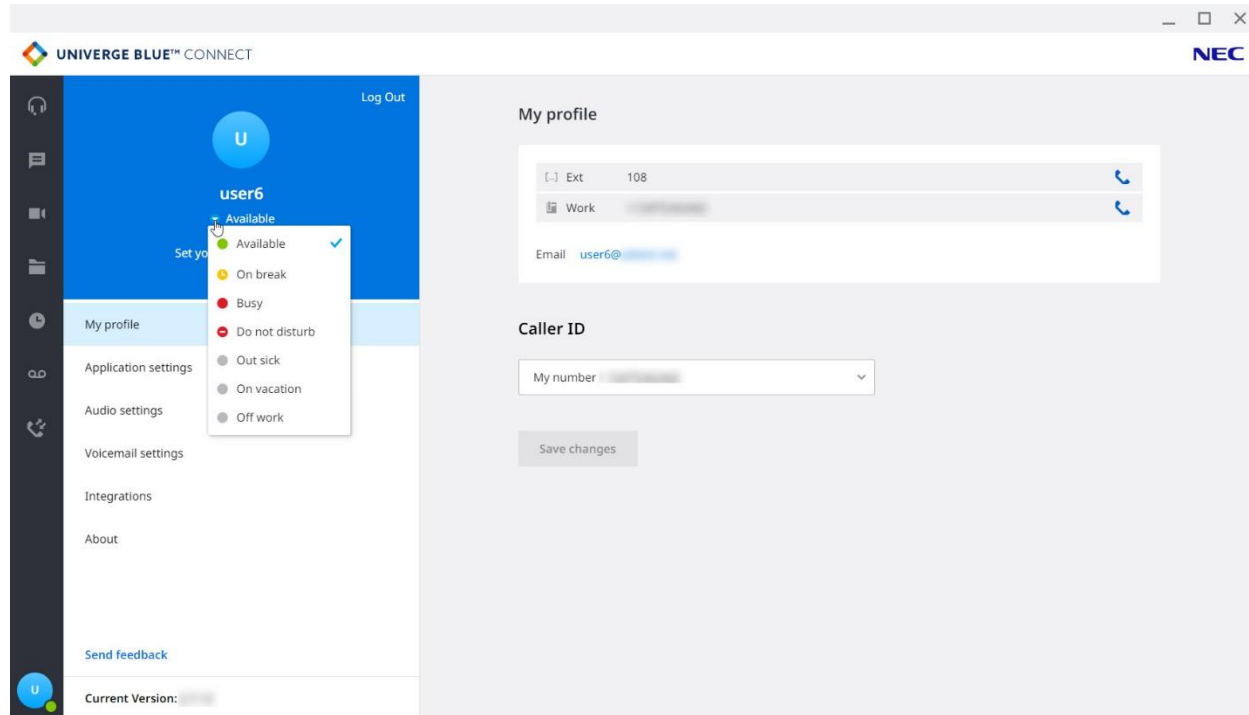
2) **Agent joins Contact Center**

Once the Agent has joined Contact Center, they can control their Status from Contact Center, but the Univerge Blue Connect Presence controls become disabled.

    a.   Agent Status in Contact Center
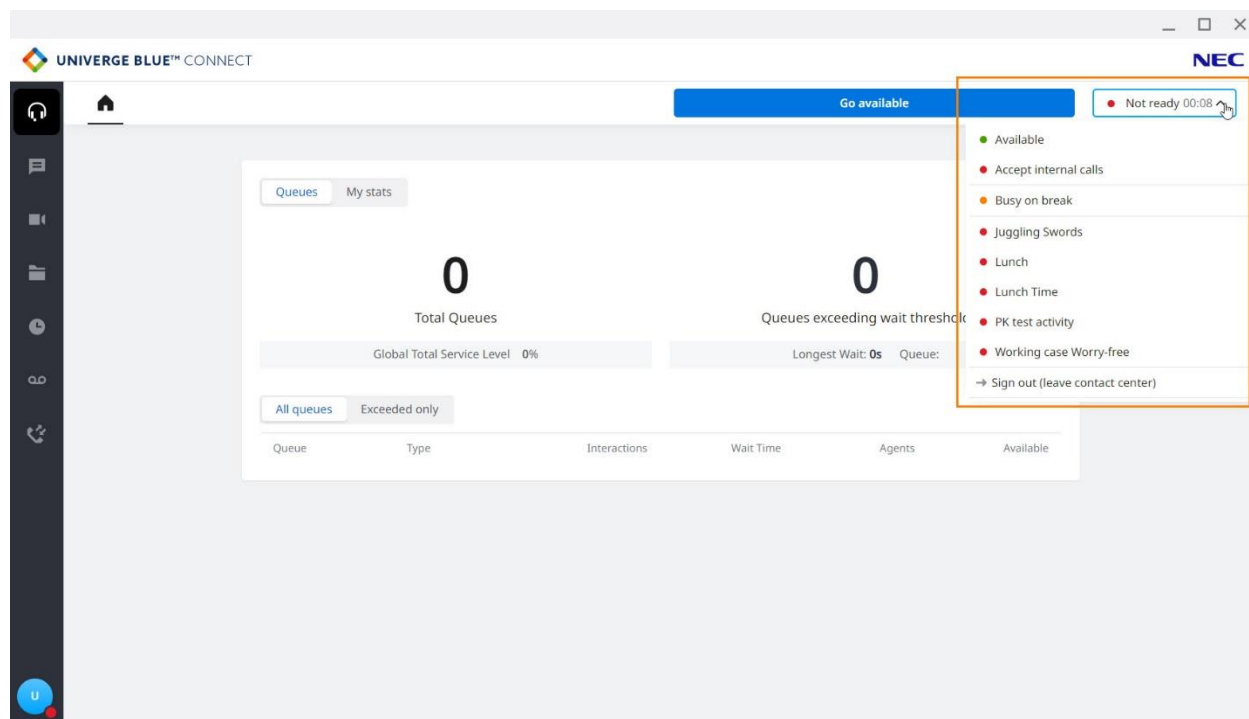
b. The Presence on Univerge Blue Connect changes to reflect the Agent's Status on Contact Center. For example, on the image below, the Agent's Status on Contact Center is **Available**. A green dot appears on the Agent's profile in Univerge Blue Connect.
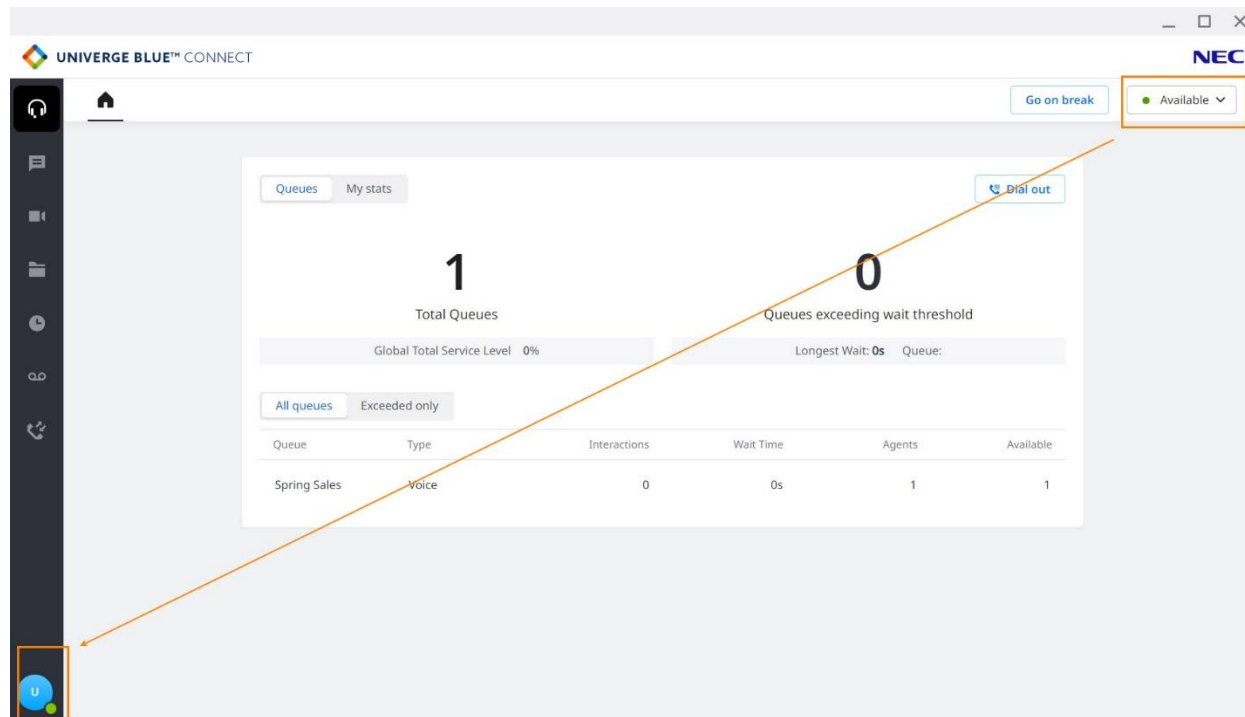
c. The Agent's profile on Univerge Blue Connect reads, **Agent available**.
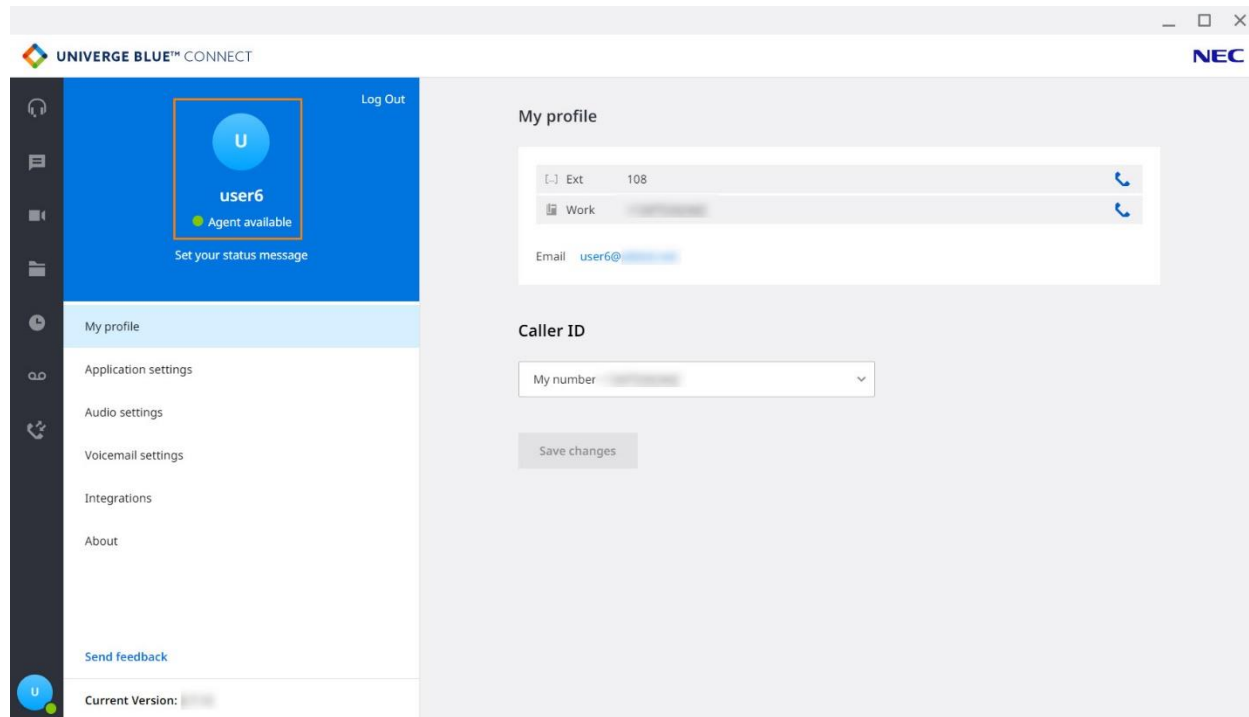
d. Other Univerge Blue Connect users will see three Presences: **Agent available**, **Agent busy**, and **Agent on call**.

e. When the Agent disconnects from Contact Center, they will be able to control their Presence on Univerge Blue Connect once again.

Presences Sync Use Cases

The following describes various synchronization scenarios.

1) **Agent joins Contact Center**
   When an agent first joins Contact Center, their Contact Center *Status* is automatically set to **Not Ready**, which immediately sets their Univerge Blue Connect *Presence* to **Agent busy**.

2) **Agent is busy on Contact Center calls**
   When an agent is busy on a Contact Center call, their Univerge Blue Connect *Presence* is set to **Agent busy on a call**, and *all* their Univerge Blue Connect calls will go straight to voicemail. The agent *can* join Univerge Blue Connect meetings, chat, and make external calls, but their *Presence* will continue to show up as **Agent busy on a call** because it is locked in this state by Contact Center.
   NOTE: The agent will **not** receive a notification that a chat came through.

3) **Agent is on a Univerge Blue Connect call or Agent is in a meeting**
   When an agent is on a Univerge Blue Connect call or in a meeting, *no* Contact Center voice interactions will be routed to them regardless of their *Status* availability in Contact Center. In addition, their Contact Center *Status* activity will not change.

4) **Agent's Status is *Available* (Presence is *Agent Available*)**
   When an agent's *Status* is set to **Available** (i.e., their *Presence* is **Agent available**), or the agent is on an activity different from **On call** (i.e., their *Presence* is not **Agent busy**), the agent will be able to receive Univerge Blue Connect calls.

5) **Agent's Status is *Available*, and Agent makes a call from Univerge Blue Connect (direct workstream)**
   When an Agent whose Contact Center *Status* is set to **Available** makes a Univerge Blue Connect call (direct workstream), their *Presence* changes to **On call**, but their *Status* remains **Available**, i.e., their Contact Center *Status* activity will not change. *No* Contact Center voice interactions will be routed to them.

   NOTE: This Agent's supervisor can monitor the Agent's current Status using the **Monitoring** feature in the Contact Center Administrator Portal (in the Admin Portal, navigate **to Analysis > Monitoring** to access the feature). Under **Current Agent Status**, the line that corresponds to this Agent appears red.

6) **Agent's Status is *Available*, and Agent joins a meeting from Univerge Blue Connect (direct workstream)**

When an Agent whose Contact Center *Status* is set to **Available** joins a Univerge Blue Connect meeting (direct workstream), their *Presence* changes to **In a meeting**, but their *Status* remains **Available**, i.e., their Contact Center *Status* activity will not change. *No* Contact Center voice interactions will be routed to them.

NOTE: This Agent's supervisor can monitor the Agent's current *Status* using the **Monitoring** feature in the Contact Center Administrator Portal (in the Admin Portal, navigate **to Analysis > Monitoring** to access the feature). Under **Current Agent Status**, the line that corresponds to this Agent appears red.

7) **Agent's Status is *Available* and they check voicemail or enter a Chat**
When an agent checks their voicemail or makes or receives a Univerge Blue Connect chat interaction, there is no change to the Contact Center *Status* or their Univerge Blue Connect *Presence*. Contact Center voice interactions *will* be routed to them. We strongly advice Agents to change their Status to **Busy** to avoid being presented with Contact Center voice interactions while engaged in other activities.

8) **Univerge Blue Connect user changes Presence prior to joining Contact Center**
When a Univerge Blue Connect user changes their Univerge Blue Connect *Presence*, joins Contact Center and changes their *Status* (thus modifying their *Presence* in Univerge Blue Connect) and then leaves Contact Center, their *Presence* in Univerge Blue Connect reverts to what it was prior to joining Contact Center, with some exceptions, as described below.

There are two specific cases to consider in this scenario.
   a. The Univerge Blue Connect user's *Presence* is one of **Available**, **On Break**, or **Busy**.
      • Depending on the Agent's activity while on Contact Center, their Presence will change to **Agent Busy**, **Agent Available**, or **Agent on a call**. When the Agent logs out of Contact Center, their Presence will change back to what it was prior to joining Contact Center (i.e., **Available**, **On Break**, or **Busy**).

   b. The Univerge Blue Connect user's *Presence* is one of **Do not disturb**, **Out sick**, **On vacation**, or **Off work**.
      • Depending on the Agent's activity while on Contact Center, their *Presence* will change to **Agent Busy**, **Agent Available**, or **Agent on a call**. When the Agent logs out of Contact Center, their *Presence* will change to **Available**.

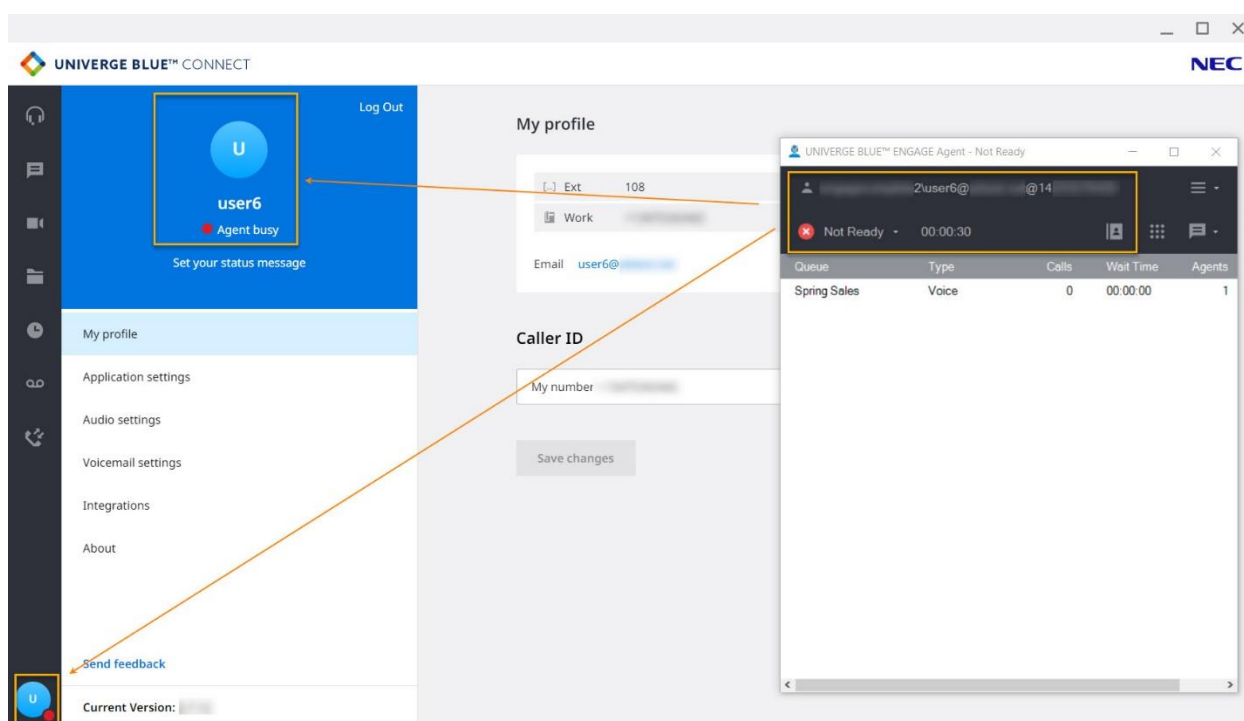## Univerge Blue Connect Presence and Univerge Blue Engage

Presence synchronization works with Univerge Blue Engage just as well as with the integrated version of Contact Center.

Important: The Agent must log on to Univerge Blue Engage using the same account and phone number used to log on to Univerge Blue Connect for synchronization to work.

Here is a list of Use Cases:

1) **Agent logs on to Univerge Blue Engage**
   Presence synchronization occurs as soon as the Agent logs on to Univerge Blue Engage. The *Status* Univerge Blue Engage is **Not Ready**, and the *Presence* on Univerge Blue Connect is **Agent Busy**.

   When Engage is thus synchronized with Univerge Blue Connect, other Univerge Blue Connect users will see three Presences for this Agent: **Agent Available**, **Agent busy**, and **Agent on call**.

2) **Agent's Status is *Available*, and Agent makes a call from Univerge Blue Connect (direct workstream)**
   When an Agent whose Univerge Blue Engage *Status* is set to **Available** makes a Univerge Blue Connect call (direct workstream), their *Presence* changes to **On call**, but their *Status* remains **Available**, i.e., their Engage *Status* activity will not change. *No* Engage voice interactions will be routed to them. In addition, the monitoring line at the top of the Engage appears red.
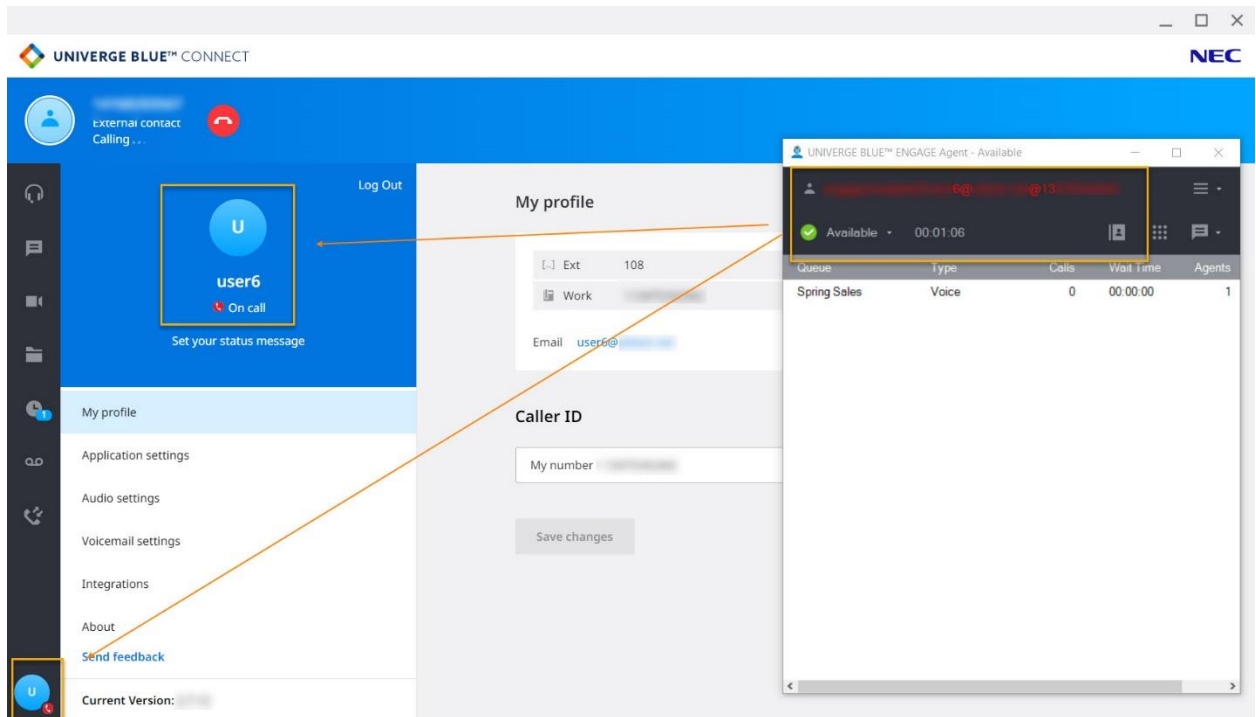
3) **Agent makes a call from Univerge Blue Engage**

When an Agent makes a call from Univerge Blue Engage (Engage workstream), their Engage *Status* changes to **Busy – On Call** (**Busy – Dialing Out** until the call is placed), the monitoring line above Engage appears red, and the agent's Univerge Blue Connect *Presence* changes to **Agent on a call**.
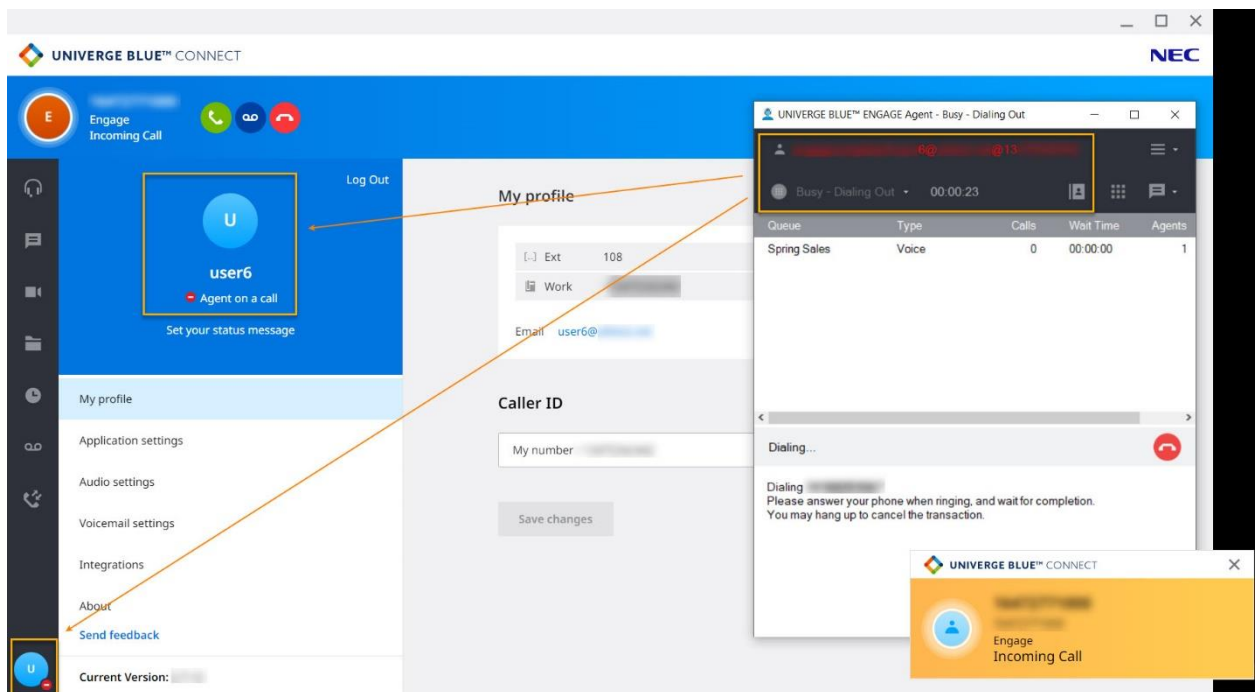
NOTE: The orange background color on the call notification is a bug that will be fixed soon. The

color should be blue.

Click the **Answer Call** button on Univerge Blue Connect to connect to the number, but **DO NOT** use the call controls that appear on the blue bar in Univerge Blue Connect. To interact with the call, use **ONLY** the call controls on Univerge Blue Engage.

Warning: Engage has no way of knowing that an Agent is using call controls from Univerge Blue Connect or any other telephone systems. Therefore, if the agent parks the call, transfers it, or performs any other actions using Univerge Blue Connect call controls, Enage will not know, and will only register that the call is still alive. The Agent's *Presence* will continue to register as Agent on a call and *no* voice interactions will be routed to the Agent. The only way to restore the Agent's Presence to Available in such a case is to log out of Engage, or for the call's recipient to hang up.