ELEVATE
UNIFIED COMMUNICATIONS

# Elevate Desktop and Mobile Application Get Started Guide

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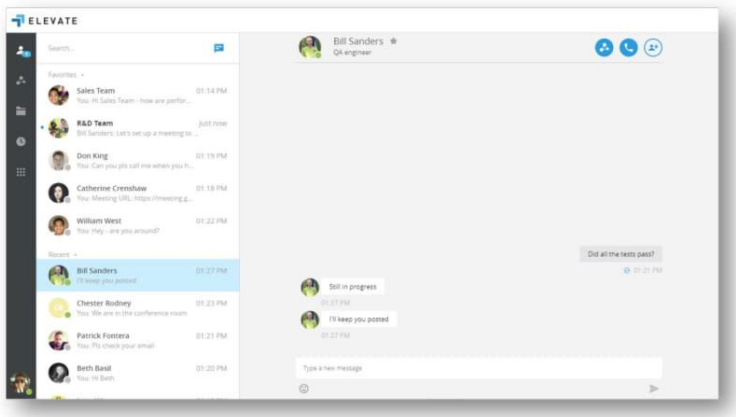
# OVERVIEW

The Elevate UC desktop app brings essential collaboration tools together, making teamwork easier than ever. See who is available, chat with colleagues, place and receive calls, share screens, start video calls and share files—all from one application.




| ICON GLOSSARY | MEANING |
|---|---|
| | Call |
| | Meet now |
| | Add member |
| | Voicemail |
| | Park |
| | Transfer |
| | Flip |
| | Dail |
| | Chat |

# INSTALLATION

Elevate UC Desktop app is available for both Windows and Mac platforms. You can download the app below at https://serverdata.net/elevateapps.

Once installed, login using your email address and your Elevate UC password.

## CALLING FEATURES

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:** acts like a remote control for your associated desk phone
- **Softphone Mode:** place and receive calls from your PC or Mac® using the computer's external speaker and microphone. A headset is highly recommended for this mode

Note: 911 emergency calls are not allowed and will be blocked by the application.

Calling features in the Elevate UC desktop app vary based on Calling mode. Please see the table below for differences between Call Controller and Softphone modes

| FEATURE / APP MODE | PLACE A CALL | RECEIVE A CALL | MUTE/ UNMUTE | HOLD | DTMF | CALL FLIP | CALL PARK | TRANSFER | END CALL |
|---|---|---|---|---|---|---|---|---|---|
| Call Controller | ● | Desk Phone | Desk Phone | Desk Phone | Desk Phone | ● | ● | ● | ● |
| Softphone | ● | ● | ● | ● | ● | ● | ● | ● | ● |

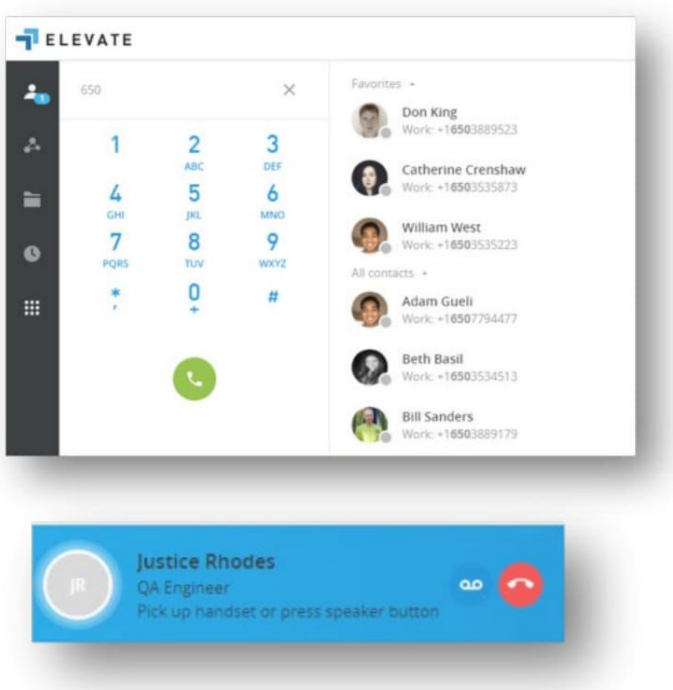
### Call Controller Mode

Placing a call:

- You can place a call using the dialpad or by clicking on the 'Dial' button in a chat or a user's contact card
- Pick up the handset or press the speaker button on your physical phone

Receiving a call:

- To answer an incoming call, pick up the handset or press the speaker button on your physical phone. You can reject a call or send an incoming call to voicemail using the desktop application.



## Softphone Mode

### Placing a call

- You can place a call using the dialpad or by clicking on the 'Call' button in a chat or a user's contact card
- The call will be placed through the computer

### Receiving a call

- To answer an incoming call, click the 'pick-up' button in the incoming call notification.

## Active Call Features

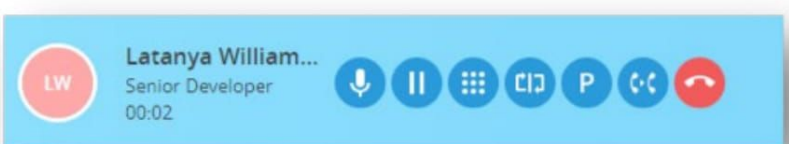
Elevate UC Desktop app provides multiple options for handling calls.

### 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 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
  4. Your first call will be placed on hold. Your second call will be established. Click on the "Complete" button to finish the transfer

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

  1. While on an active call press Transfer
  2. Select Transfer to Voicemail icon

## Call Parking

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

- Press “Park” icon next to the active call
- The system will tell you which extension the call is parked on
- Share the parked call extension with the co-worker who can help the caller
- To pick up the call, you or your coworker should dial the extension the call is parked on

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

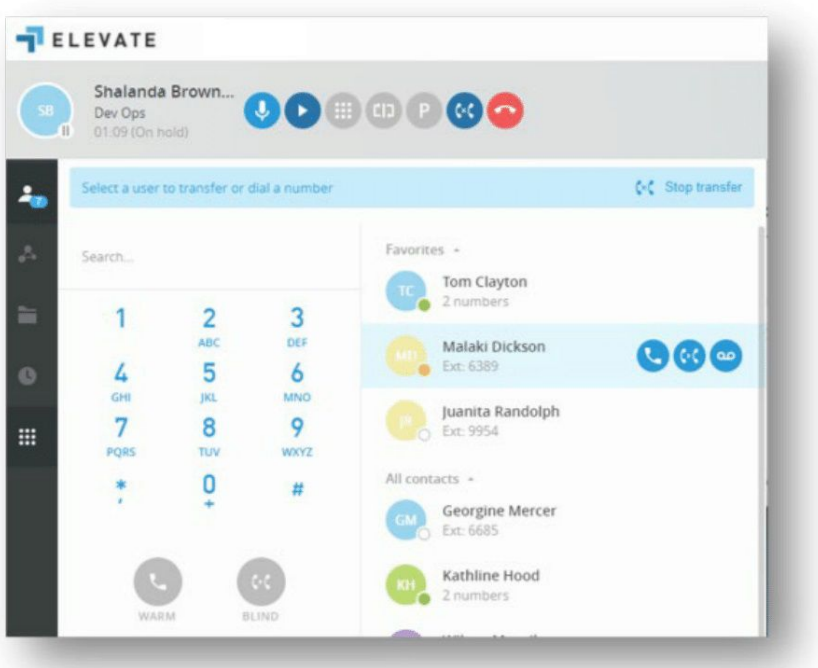
## Call Flip

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. Call will be placed on hold and all other assigned devices will start ringing
3. Pick up the call and continue conversation on the new device

## Call History

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



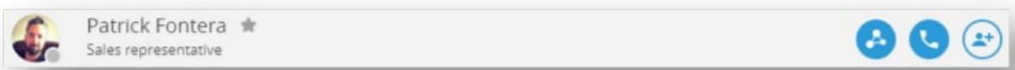
# CONTACTS

### Contacts Search

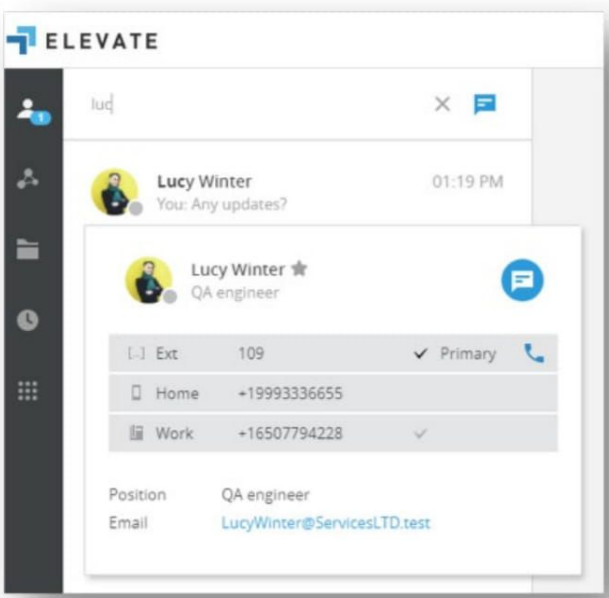
Elevate UC Desktop allows you to search for and initiate calls and chats with your co-workers. Searches can be conducted by first name, last name, job title, position, department, or email address.

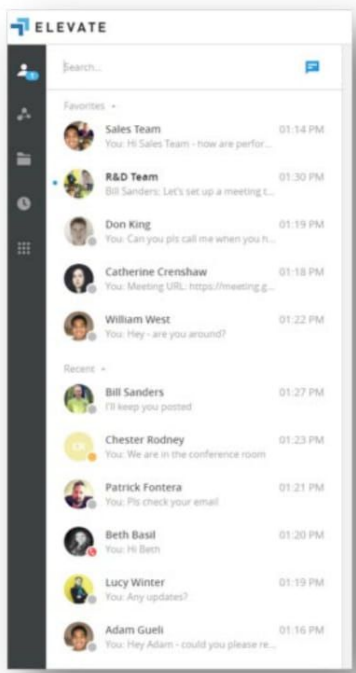
Once the search results appear, you have two choices:

1. You can click on the contact from the search results, which will open a chat window with them, from there you can chat with them or use the Call button to call them.




2. Or, you can hover over their avatar, and choose to chat or pick a number to dial.



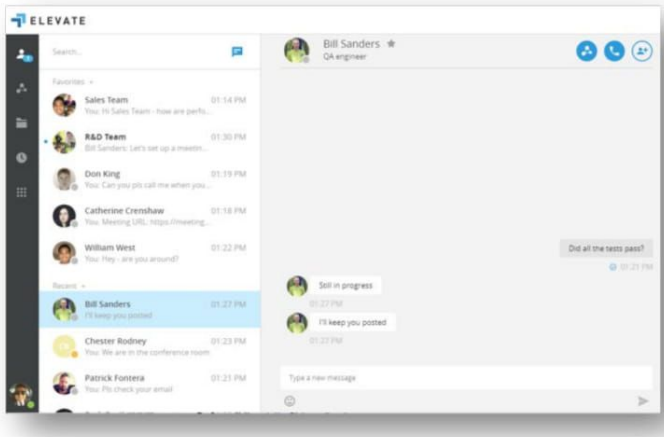




### Setting Favorites & Viewing Recent Contacts

Elevate UC Desktop allows you to pin your 'Favorite' contacts to the top of your client for easy access. Below your favorites you will see a list of your most 'Recent' chats.

# TEAM CHAT & MESSAGING FEATURES

Elevate UC Desktop enables you to chat with any of your co-workers

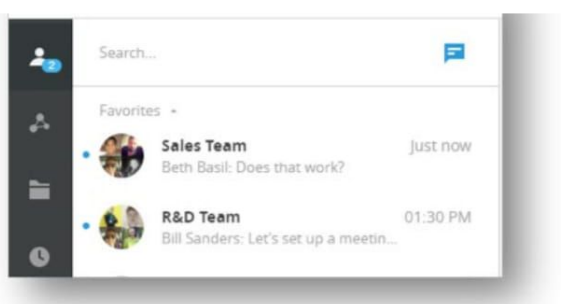



## Sending a chat

- You can initiate a chat by searching for a contact or clicking on a 'New Chat' button and selecting the user you want to chat with

## 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

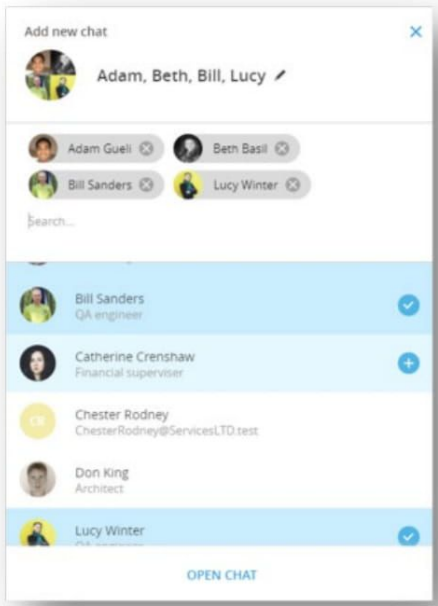



## In-chat collaboration options

- 'Call' button will call the collaborator on their extension
- 'Meet now' button will start a meeting (screenshare, video call, conference call) with a chat collaborator

## Team chat

Elevate UC Desktop allows you to create team chats, so that multiple users can participate in a chat at the same time.

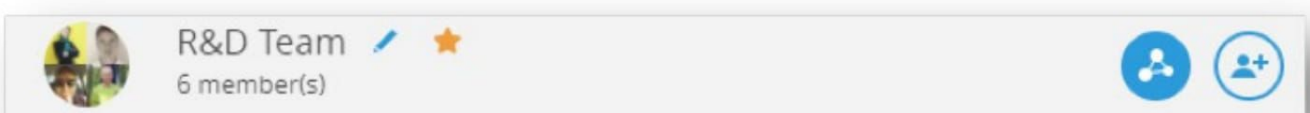



Creating a team chat

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

In-chat collaboration options

- 'Meet now' button will start a meeting (screenshare, video call, conference call) with team chat members

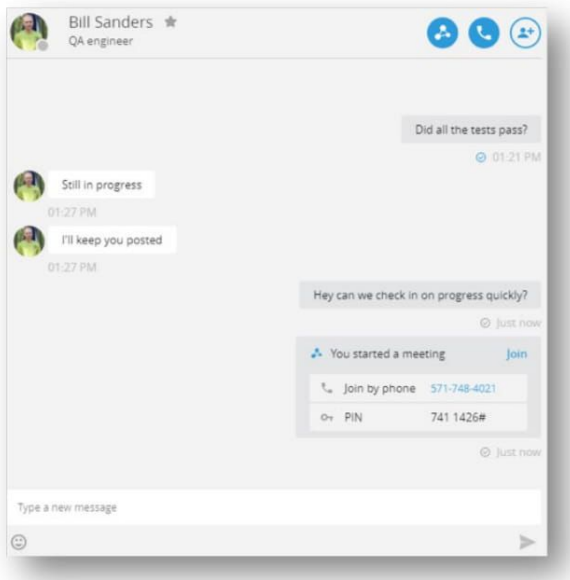



## Chat history

- Chat history is retained indefinitely
- Chat history is also synced across all of 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

# MEETINGS

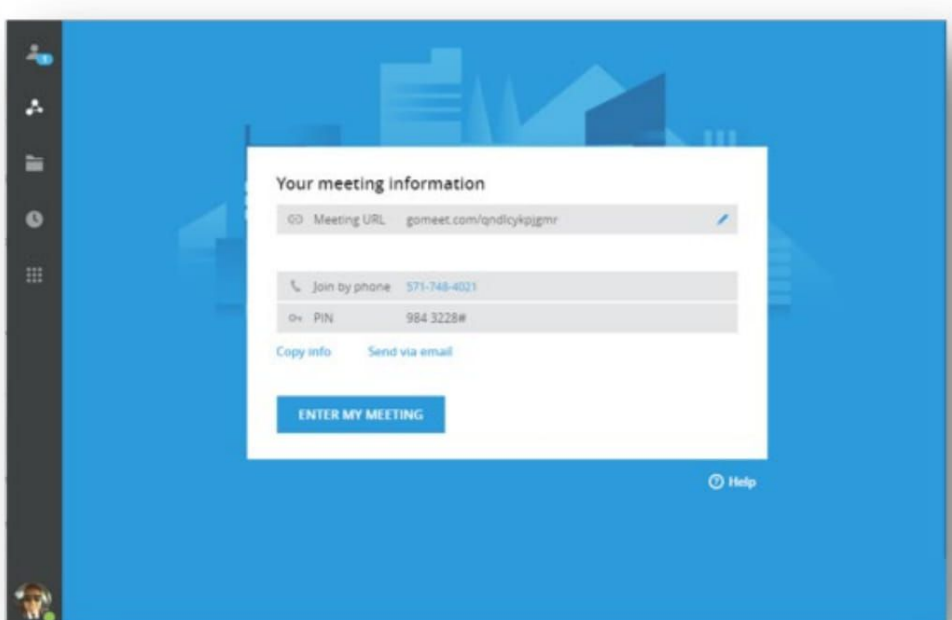
Elevate UC Desktop enables you to easily start and participate in online meetings. Meetings will allow you and your co-workers to join an audio/ video conference, screen share, record, etc.




**Start a meeting**
Users can start a meeting in 2 different ways:

1. Screensharing and conferencing with members of a chat
    a. You can start a meeting with members of a one-on-one or team chat by clicking on the 'Meet Now' button

2. Meetings Tab
    a. You can easily start your previously scheduled meeting from the Meetings tab
        i. Meeting details (Personal Meeting URL, Conf bridge info, etc.) are typically shared via a calendar invite
        ii. Clicking on START MY MEETING will launch your meeting



### Meeting Features

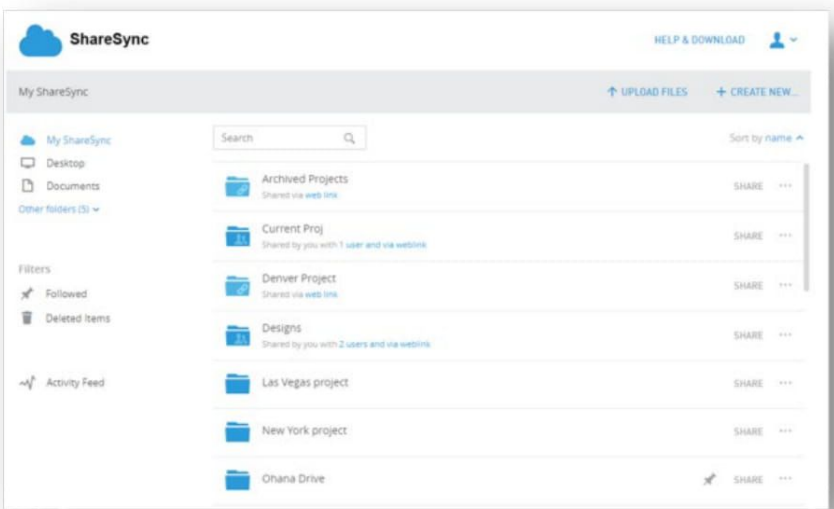
- Built-in Audio Conferencing: includes a conference call number and PIN codes so participants can join by phone or computer
- HD Video conferencing
- Screensharing
- Meeting notes
- Lock meetings so new participants can't join

### Licensing

Each Elevate UC user account includes an Online Meeting license which supports up to 200 meeting participants via audio and 4 web meeting participants. Contact your admin if your license is not enabled or you require a license to host larger web or video meetings.

## FILES

File tab allows you to single sign on into your ShareSync account. ShareSync allows you to securely store, manage and access your files from any device, protect your files from viruses and data loss, and securely share & collaborate on files with coworkers and external parties.




SecuriSync desktop and mobile apps are available as separate installations. Please refer to the SecuriSync Quickstart guide for more details.

### Licensing

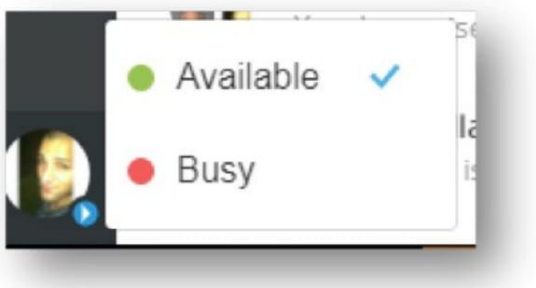
Each Elevate UC user accounts includes 2GB/user of ShareSync. Contact your admin if your license is not enabled or you require a higher storage allotment.

# PRESENCE

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

| 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 Call | Automatically - when a user is on a call |
| | 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 |

**Setting your presence Manually**
You can manually toggle your presence by hovering over your presence ball.



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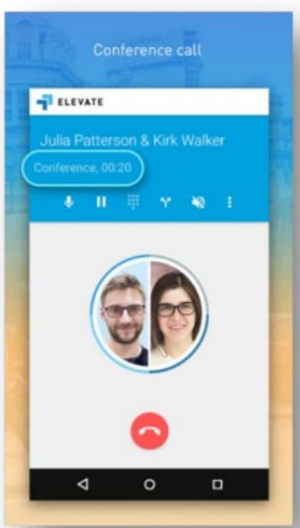
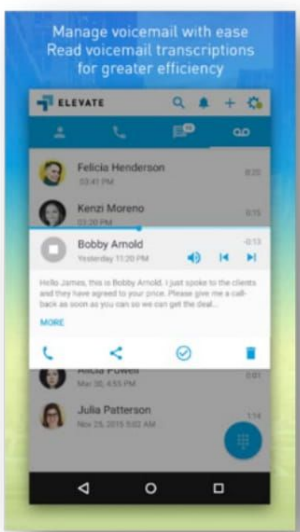
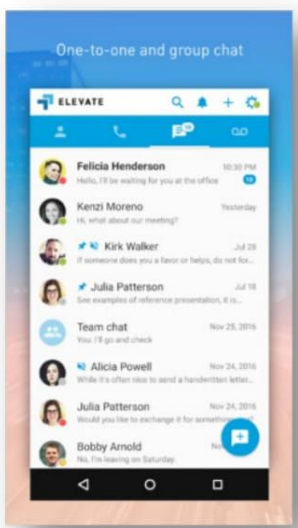
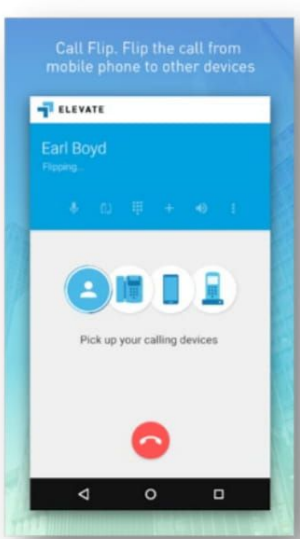
# MOBILITY

Elevate UC mobile apps allow you to place and receive calls, chat, attend meetings*, and manage your ShareSync files* from anywhere as though you were in your office. The apps are available for iOS and Android in the respective App stores.

* features require Online Meeting and ShareSync apps to be installed.