

Unified Calling (Softphone) Basic Features Job Aid

A softphone is a program that allows users to make telephone calls over the internet instead of a dedicated phone line. At UMB, the program we use is Cisco Webex Unified Calling. This program allows UMB employees to make calls from their work PC, laptop or mobile device and have it appear that the call is coming from their work phone.

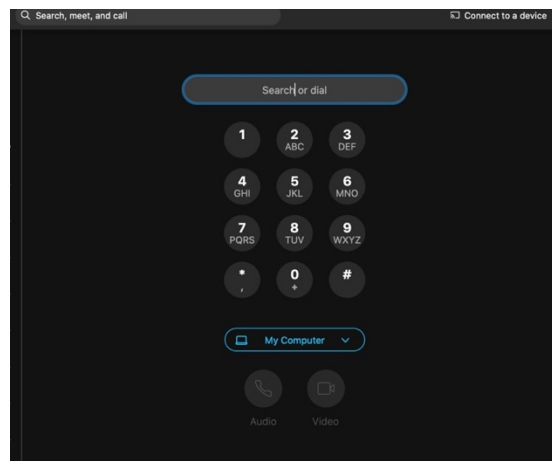
Just a friendly reminder that in order to utilize the new Cisco Webex Unified Calling (Softphone) feature, you must meet two of the following requirements:

1. You must have a CITS managed phone number
2. You must have a Webex license
 - a. Additionally, you must have the Webex client app installed on your PC/Laptop/Mobile Device

Making a Phone Call:

Main Screen – There are 2 primary ways to make a call:

- Dial –
 - A phone number can be entered using your mouse on the keypad or using the keypad on your computer keyboard.
 - Dialing an external number to UMB requires a “9”
 - Dialing a long distance number requires a “1”
 - Calling another UMB extension can be done using 6 and the 4-digit extension
 - Using this method is where the recipient will see your number appear as being from your work phone extension.
- Search –
 - You can search for UMB employees by name. Using this method will be a computer to computer call, very similar as if you were meeting via a Webex Meeting.
 - You have the option to make it audio only or include video. Once the call is in session, the video can still be turned on or off.

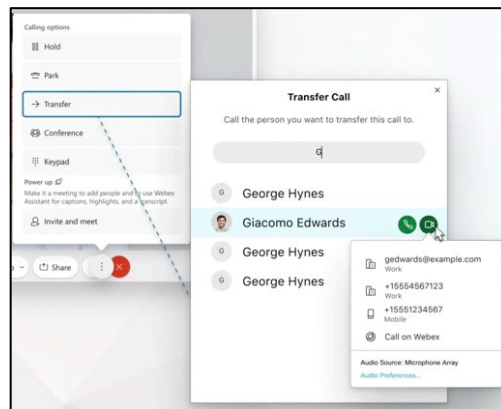


Receiving Calls

- By phone –
 - A pop-up window will appear displaying the number/ caller ID info
 - Select **Decline** or **Answer**
 - **Answer** – use laptop audio/ headset
 - **Decline** – will go to Voicemail
- If by Search – The experience will be very similar with a similar pop-up, will display name and internal 5 digit phone number

Transferring Calls


- The Transfer function allows the user to redirect a connected call within Webex to different user on another line/number.
 - When you are on phone call with someone, navigate to the bottom tool bar and click on the **3 ellipses**, then click **Transfer**
 - In the new pop up window, search or enter that person's name/number and then choose if you want an **Audio** or **Video** call
 - Your original call will be placed on hold
 - Let the other person know why you're transferring the call and then select **Complete Transfer**



Conference Call

- In the event you are on 2 calls at the same time, you have the option to merge them into a single conference call
 - When you are on phone call with someone, navigate to the bottom tool bar and click on the **3 ellipses**, then **Conference/Add Person**
 - In the new pop up window, search or enter that person's name/number and then choose if you want an **Audio** or **Video** call
 - Click **Merge** to join the 2 calls

On a Call Presence

- In Webex, users in the same organization can see this presence indicator during an active call. 

Voicemail

Along with receiving an email notifying you of any voicemails, you can check your voicemail in the Webex Client.

- Two tabs –
 - Inbox – displays all voicemails
 - Unread – displays only those that are new and haven't been listened to
- Select a call or right click - you can then listen, delete and mark unread. You can also make a return call directly from the VM screen
- Note that even if you delete a voicemail in the Webex Client app, you will still be able to listen to the voicemail via the email sent to you.