

# Your Guide to Stanford Softphone

 powered by Cisco Webex Teams

Use this guide to get started with Stanford Softphone, powered by Cisco Webex Teams. This guide is not exhaustive; there are additional features not covered here. Depending on the operating system you are using (i.e., Windows, MacOS, Android, or iOS), you may find slight variations from these instructions.



## GET READY

### 1

#### Download and install Webex

- **COMPUTER** (Windows or MacOS)
  1. Visit the [Webex download page](http://www.webex.com/downloads) (www.webex.com/downloads).
  2. Click **Download**.
  3. Open the downloaded file and follow the instructions to install.
- **MOBILE DEVICES** (Android or iOS)
  1. From mobile devices, download Cisco Webex from Google Play (Android) or App Store (iOS).

*After download, the application automatically installs on your device.*

**Note for Healthcare clients:** Contact your IT administrator to install Webex onto your device.

### 2

#### Connect to Webex

1. Open the Webex application
2. If prompted enter:
  - University users enter SUNetID@stanford.edu and password.
  - SCH users enter SCH email address (e.g.doe@stanfordchildrens.org) and password

*The Webex application opens.*

### 3

#### Set Settings/Preferences

The first time you open Webex, it may ask for permission to use your camera and microphone. You should allow this access.

Additionally, Webex offers options to customize it to meet your needs. Choose the right settings for you. To change preferences:

1. Click on your identity icon (top left of Webex window).
2. Click **Settings (Preferences)** on a Mac).
3. Review and change the various options to meet your needs.

**RECOMMENDATIONS:** We suggest you:

- Turn off **Answer calls with my video on** (under Calling options on computer; under Video options on mobile). This keeps your video from unexpectedly displaying automatically.
- Set **Start call with:** to Webex Team (under Calling > General options on computer; not available on mobile). This prevents Webex from using another application (e.g., Jabber, Zoom, Facetime) to place your call.

### 4

#### Transfer contacts from Jabber to Webex

If you use Jabber, you can choose to automatically duplicate your contacts in the Webex application. You must have both the Jabber and Webex application installed on the device.

- **COMPUTER** (not available on mobile)
  1. Open the Jabber application.
  2. From the **Help** menu, select **Move data into Webex**. (*This duplicates — not deletes — your Jabber contacts and settings in Webex.*)
  3. Follow the instructions in the Jabber screens that appear.

**IMPORTANT:** This procedure will not work if you are using a SUNet ID alias as your primary email address and/or you are logged in to Webex using a SUNet ID alias. For more details, see “Why won’t my Jabber contacts transfer to Webex?” in the [Cardinal Voice Softphone Pilot page](#).

### 5

#### Understand the primary icons

Stanford Softphone service — powered by Webex and provided by University IT— gets you communicating and collaborating in the most productive ways.

With Webex, you can “talk” to someone, or a group of people, via:

-  **Chat** (i.e., online messaging) — real-time transmission of typed text messages
-  **Softphone call** — an audio call to the recipient’s telephone number from your device using your Stanford phone number
-  **Video call** — a video call from your active device to the recipient’s active device

Each of the features can be used with an individual, within a *space*, or with a *team*. For a quick summary of spaces and teams see #6 (Learn about Spaces and Teams).

### 6

#### Learn about Spaces and Teams

In addition to using the Webex features with individual contacts, you can use them in groups.

- **Space** — a virtual room where multiple people can send messages, make calls, have video meetings, share files, and whiteboard together
- **Team** — where people working together on multiple projects across various spaces can keep organized

For more details visit: [Welcome to Webex](http://bit.ly/3chsnoq) (bit.ly/3chsnoq).



## CONTACT BASICS



### Find contact information for the person you want to “talk” to

Regardless of the way you want to talk to someone (e.g., chat, softphone, or video), the first step is to locate contact information for that person. The following are a couple of common ways to locate contact information in Stanford Webex.

#### • USING THE DIRECTORY IN WEBEX

1. In the **Search, meet, or call** field or the  field (top center of Webex window), type the person’s name. *Contacts matching your search appear below. You may have to click **Show more** to see all the results.*
2. In the search result, hover over the appropriate contact and:
  - **Chat:** Click the contact’s name. *A private chat window appears.*
  - **Softphone call:** Click  to the right of the person’s name. *A softphone call is placed to the phone number on file for that person.*
  - **Video call:** Click  to the right of the person’s name. *A video call is placed to the person’s active devices.*

#### • USING YOUR WEBEX CONTACTS LIST

1. Click  in the navigation menu (left side on computer, bottom on mobile).
2. Hover over the appropriate contact (computer) or click on the contact (mobile) and click the method you want to use to talk:
  - **Chat:** Click the contact’s name. *A private chat window appears.*
  - **Softphone call:** Click  to the right of the person’s name. *A softphone call is placed to the phone number on file for that person.*
  - **Video call:** Click  to the right of the person’s name. *A video call is placed to the person’s active devices.*



### Add contacts to your contact lists

- **COMPUTER** (Windows or MacOS)
  1. Click  in navigation menu.
  2. Click **Add a contact**.
  3. See options below.
- **MOBILE** (Android or iOS)
  1. Tap  in navigation menu.
  2. Tap .
  3. Tap **Add a contact**.
  4. See options below.

#### Options

You can:

- add the new contact to one of your existing contact groups or **Create a (new) group**, a feature that helps you organize your contacts
- search the directory for Stanford contacts to add
- **Create a custom contact** to manually enter information for for a non-Stanford contact



### Webex Tip:

#### Is the contact active?



**Active:** The identity icon for Stanford people actively connected to the Webex application is surrounded by a green circle.



**Inactive:** The identity icon for Stanford people NOT actively connected to the Webex application is not surrounded by a green circle.

*Not all users have uploaded a picture so the icon may include just initials (e.g., JS). And, even though a person may be active, they might be otherwise occupied and not available to chat or take your call.*



### Webex Help:

#### More about Contacts

Learn more about using contacts at the [Cisco Webex Help Center](#).

- [bit.ly/3rAKtZa](https://bit.ly/3rAKtZa)



## CHAT BASICS

After setting up a chat with a person, as described above, you can exchange online messages.

### Send a chat message

1. Click in the **Type a message to <person's name>** field\* (bottom of Chat screen).
2. Type the message you want to send.
3. Press return/enter (on your keyboard).

### Add more to your chat message

You have options for enhancing your message by formatting text, attaching files, using emojis, and more.        These options are available just above the **Type a message to <person's name>** field (labeled **Send a message** on mobile). Simply click on the one you want to use. (*NOTE: Some of these options are not available on mobile.*)

### Turn a chat conversation into a phone or video call

When chatting with someone, you may find it would be helpful to talk rather than type. You can quickly establish a softphone or video call with that person:

- **Phone call:** Click  (top right corner of the Chat window).
- **Video call:** Click  (top right corner of the Chat window).



### Things to know

- You can only chat with other Stanford Webex users.
- You can send a chat to someone whether or not they are actively connected to the Webex application. Your messages appear immediately on active devices; they are queued for later delivery on inactive devices.



### Webex Help:

#### More about Chat Messaging

Learn more about using chat messaging at the [Cisco Webex Help Center](#).

- [bit.ly/3eq5rWK](https://bit.ly/3eq5rWK)



## SOFTPHONE BASICS



### Manually place a call

In addition to the methods described above under *Contact Basics*, you can always enter a phone number directly.

1. Click  in the navigation menu.
2. Type the person's phone number in the **Search or dial** field above the dial pad. You can also enter the number using the Webex keypad or your keyboard.
3. Click  below the dial pad.



### Receive a call

When an incoming call rings on an active device, a window opens providing any available caller ID information.

- Click **Answer** to accept the call.
- Click **Decline** to forward the call to voicemail.



### Place a call on hold

1. Click  in the active call window.
2. Select  **Hold**. *The call is placed on hold.*
  - To reconnect to the call, click . *You are reconnected to the call.*



### Transfer a call

1. Click  in the active call window.
2. Select  **Transfer**. *The call is placed on hold.*
3. Type the name of the person or the phone number to which you want to transfer the call in the search box.
4.
  - If you searched by name: Hover over the appropriate contact's name in the search result and click . *Wait for the person to answer.*
  - If you entered phone number, click . *Wait for the person to answer.*
5. Click  **Transfer**. *You and both other callers are in a three-party conference.*
6. Click . *You are disconnected from the call. The other two parties remain connected.*



### Forward incoming calls

1. Click  **Call Settings** (below the navigation menu).
2. In the **Call Forward** drop down menu, select your preferred choice.
  - If your preferred choice is not listed, click **Open Call Preferences** (at the bottom of the window), click **Calling** icon, click **Call Forward** tab, and click **+** to add a new phone number.
  - To unforward calls, click  and select **Do Not Forward Calls** from the **Call Forward** drop down menu.



### Turn a phone conversation into a video call

When talking on your softphone with someone, you may find it would be helpful to establish a video call. The person must be active in the Webex application to receive the video call. To quickly switch to a video call with that person:

1. Click  **Start video** (bottom of the active call window).



### Things to know

- To use Stanford Softphone, you must have a Stanford telephone number associated with you.
- You must be logged in to the Webex application to place or receive calls using your softphone. The call recipient doesn't need to be logged into Webex or be a Webex user to receive your call. Your call will ring on any ACTIVE devices — desk phone, mobile phone, connected softphone — associated with the telephone number you called.



### Headset Recommendation

When using the softphone or video call features in a noisy work environment — whether onsite or remote — it is important to have wired headsets with active and passive noise cancellation. See UIT's headset recommendations at:

[hardwarerec.stanford.edu](http://hardwarerec.stanford.edu)

And don't forget to set your Webex and devices audio preferences for your particular headset.



### Webex Help: More about Using the Softphone

Learn more about using the softphone at the [Cisco Webex Help Center](https://www.cisco.com/webexhelpcenter).

- [bit.ly/2N62mA7](https://bit.ly/2N62mA7)



## VIDEO CALL BASICS



### Use your Personal Meeting Room

When you click , Webex will establish a video call using your Personal Room, a video space associated with your Stanford Webex account. Such meetings are ideal for quick, one-on-one, ad hoc connections. The link associated with your Personal Room meeting is [stanford.webex.com/meet/<your SUNet ID>](https://stanford.webex.com/meet/<your SUNet ID>) (e.g., [stanford.webex.com/meet/jsmith](https://stanford.webex.com/meet/jsmith)).



### Join a pre-scheduled Webex video meeting

#### • THROUGH AN EMAIL OR CALENDAR INVITE LINK

Typically, when someone sets up a video meeting they want you to attend, you receive an email and calendar invite that includes information for how to join the meeting (e.g., a **Join Meeting** button, a web link). When you click that link, you are connected to the meeting. If you do not have the Webex application open, you may be prompted for permission to open it.

#### • THROUGH THE WEBEX APPLICATION

With the meeting ID number and password you can join a Webex meeting through the application.

1. Click  in the navigation menu (left side on computer, bottom on mobile).
2. Click  (**Join a meeting**).
3. Enter the meeting ID and password when prompted.
4. Click .



### To schedule a Webex video meeting

Most video conferencing meetings are scheduled in advance. You can schedule a planned meeting and notify all participants using the Webex Meeting Scheduler.

1. Click  in the navigation menu (left side on computer, bottom on mobile).
2. Click  (**Schedule a meeting**).

**Note:** By default, Webex uses Outlook to schedule meetings. If you do not want to use Outlook, you should change your meeting scheduler settings. A link for **change your meeting scheduler settings** appears at the bottom of the Meetings page (not available on mobile).

3. Complete the meeting scheduling template.
4. Click .



### Things to know

- You can only have a video call with other people connected to Webex. They do not need to be Stanford Webex users but they must connect to Webex through the application or a web browser.



### Webex Help: More about Video Calls

Learn more about using contacts at the [Cisco Webex Help Center](#).

- [bit.ly/3bzrc4Q](https://bit.ly/3bzrc4Q)

## Additional Resources and Support

For questions or additional support, please submit a [Help request](#).