EVOLVE IP
WORK ANYWHERE™

WebEx for BroadWorks
Quick Start Users Guide v2.22

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WebEx for BroadWorks

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Getting Started

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Introduction

About this guide

In scope: This guide is intended for users familiar with the UC-One interface and are migrating to Webex. This guide provides a review of commonly used features in UC-One and describes how to use the same feature in Webex

Out of Scope: How to install WebEx, how to configure WebEx (audio, camera, backgrounds, advance settings, etc.). There are already established guides for these features which can be found at the following link: https://help.webex.com/en-US/article/n3xx7vcb/Get-Started-with-Webex-App

IMPORTANT: UC-One users will need to manually enter their contacts and chat history into Webex. These are not automatically copied over into Webex.

Overview of layout differences

Both programs provide a convenient tool bar on the left side for the most common used features.

UC-One icon order from top down

1. Contacts
2. Chat
3. Call History
4. Dialpad
5. Directory

The top menu bar in UC-One is removed in WebEx. Users access the same functionality using the icons on the left side tool bar in WebEx.

Webex icon order from top down (with corresponding UC-One functions)

1. Messaging (equivalent to Chat)
    a. From here you can message an individual or a team
    b. Guide: Click Here
2. Teams (new)
    a. This feature is an area for collaboration between one (1) or more invited participants
    b. Create a Team Guide: Click Here
    c. Spaces and Teams Guide: Click Here
3. Contacts (equivalent to Directory)
    a. Allows user to Add & Manage contact(s)
    b. Add Someone to Contact List Guide: Click Here

  c. Add Contact Guide: <u>Click Here</u>

4. Calling (equivalent to Dialpad)

  a. Allows user to direct dial phone numbers and call Contacts via voice and video

  b. Calling Guide: <u>Click Here</u>

5. Meetings (new)

  a. Displays upcoming meetings; lets users join meetings and create meetings

  b. Meetings Guide: <u>Click Here</u>

6. Personal Insights (new)

  a. Metrics on Webex app usage

  b. Personal Insights Guide: <u>Click Here</u>

UC-One Icon Bar
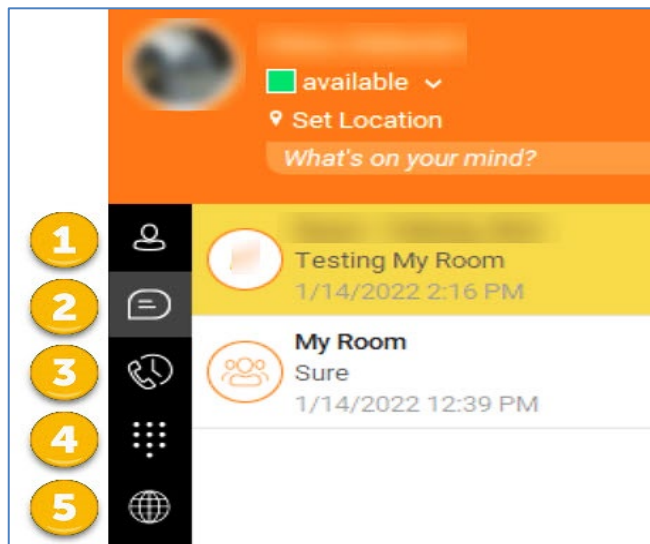
Webex Icon Bar
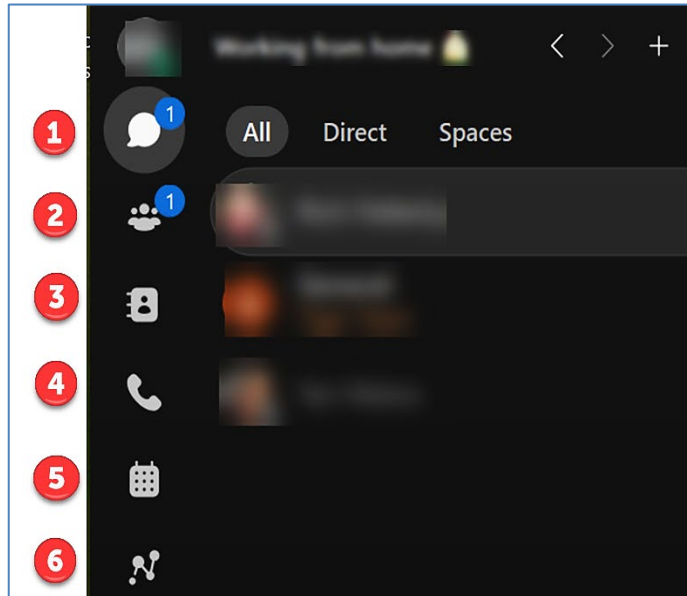
Set Status

To set status

- Click Set a status at the top left of the screen.

    o New Webex options include selecting a status from the pre-populated options or creating your own status message.

- Use Clear after to choose a time interval after which this status is cleared.

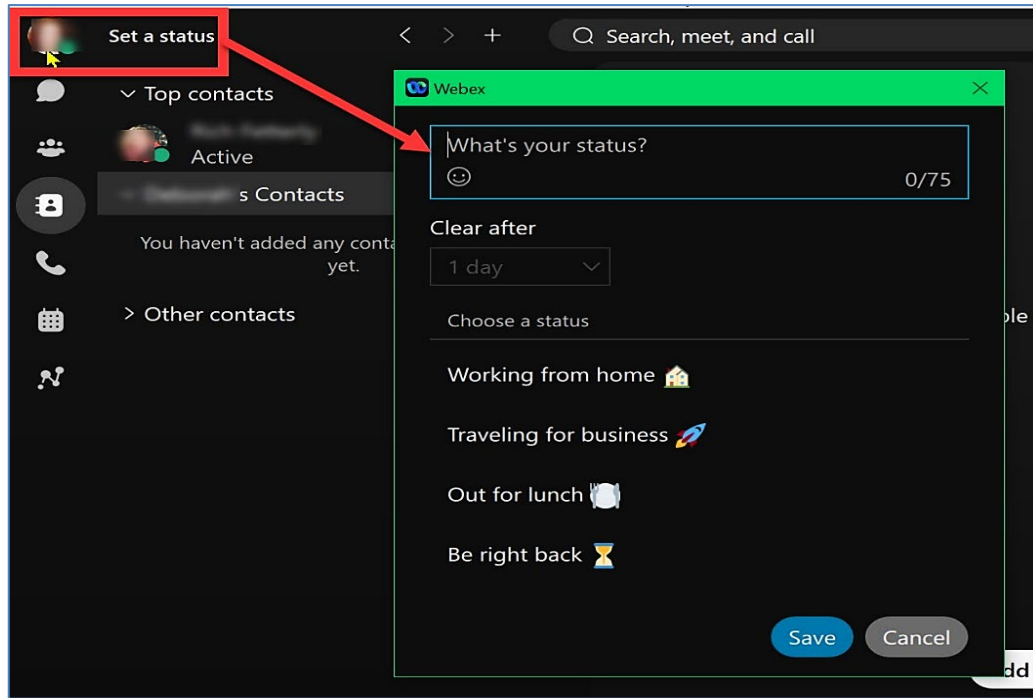- Select Save at the bottom of the Status window to save changes.

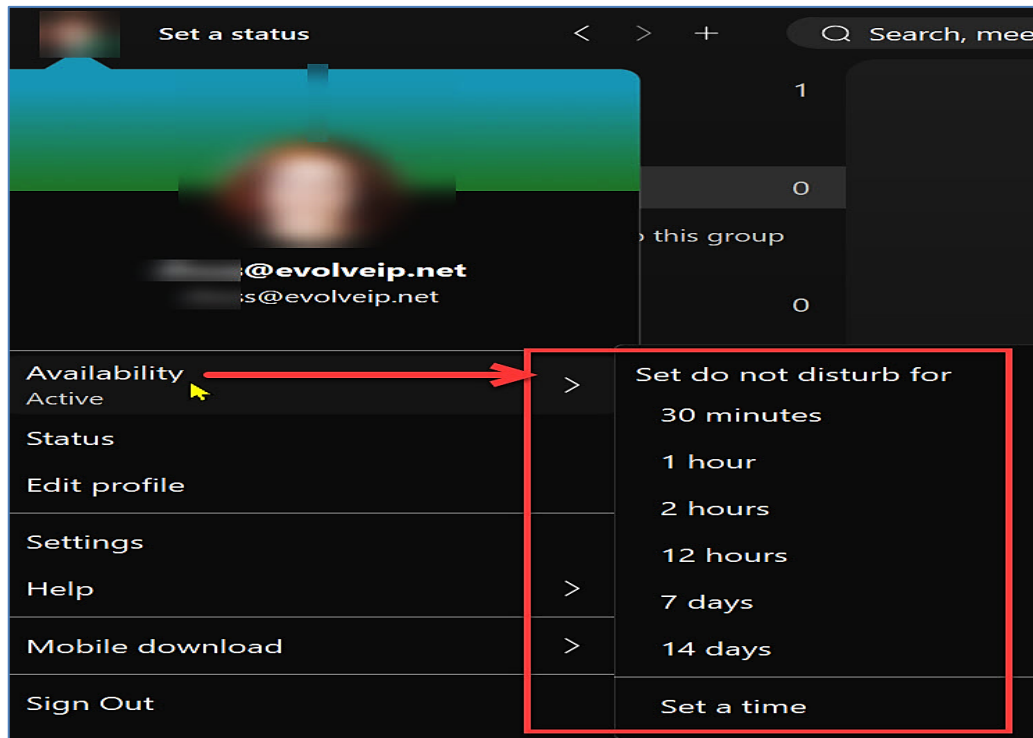Guide: [Click Here](#)

Let people know you are busy

- Click on your Profile & Settings icon, in the upper left corner and select Availability.

- The Set do not disturb for menu will drop below.

- Click on Availability and use the presets or set your own time preference.

Guide: [Click Here](#)

Example for setting status

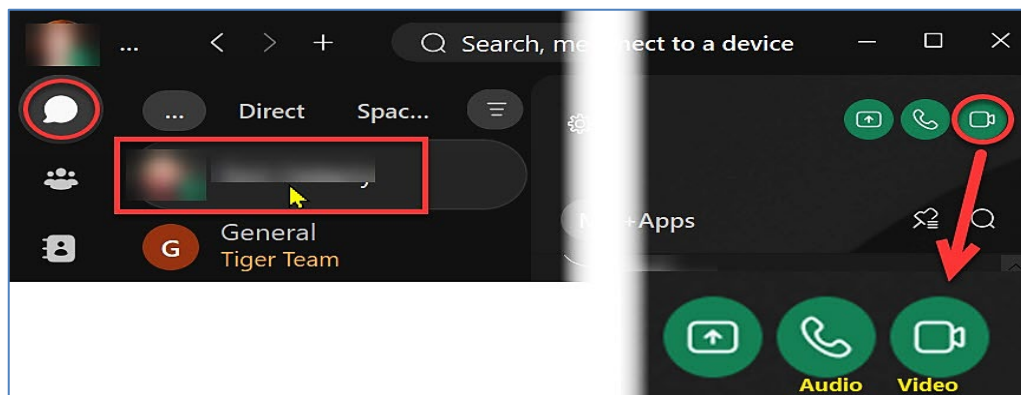## Example of menu for blocking time

Create an instant meeting

In the Webex App

- Choose (#1) Messaging icon
- Select a contact ,and
- Press the Camera icon on the upper of the right window.
- This opens a new window with video and Webex calls the selected recipient.

You can also set up an audio-only call using the Phone icon next to the Camera icon.
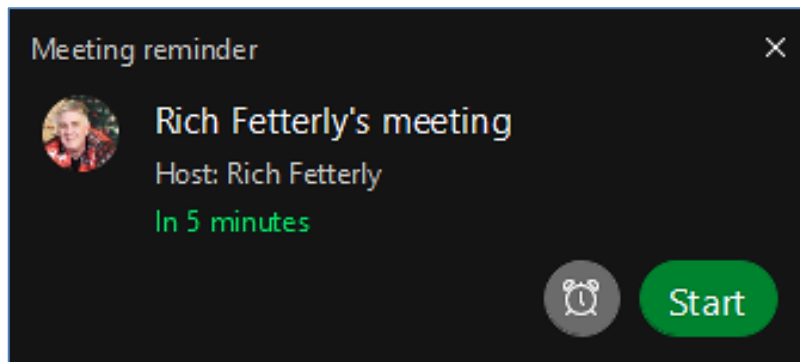
Guide: Click Here

Join a scheduled Webex meeting

There are multiple ways to join an already scheduled meeting in Webex.

Method 1: Popup Reminder

- Five minutes before the meeting Webex displays a popup message.
- Press the green Start button at the bottom of the popup to begin or join the meeting.

Note that the popup appears exactly 5 minutes before the meeting is set to start. If left on, it counts down the minutes.
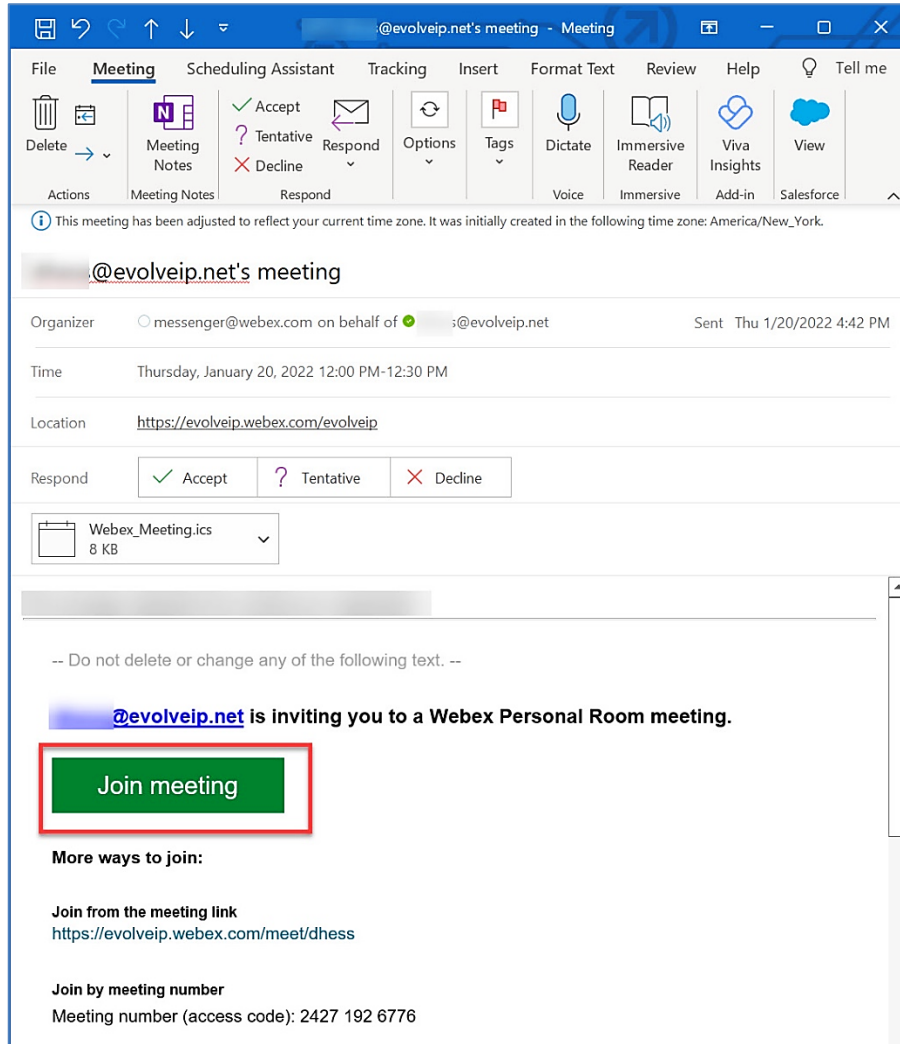
Method 2: Left-hand Navigation Icon

- In the Webex App choose Icon 5, Meetings on the left side.

- Select the green Join a meeting button which displays a popup window.

- In the popup, enter the meeting information.
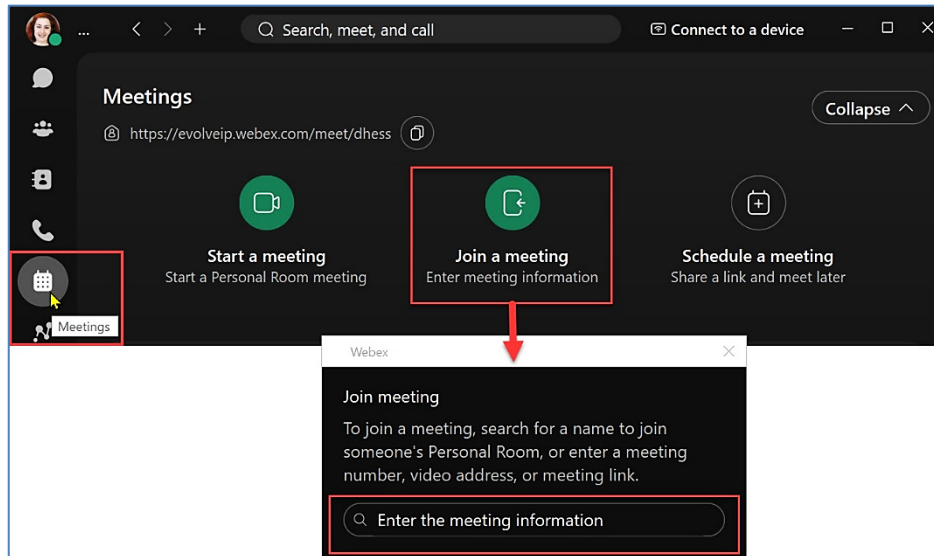
Guide: [Click Here](#)

Method 3: Button in Meeting Invite

- In Outlook, go to the calendar app and choose the calendar event to open the meeting window.

- Click the green Join meeting button to start the meeting.

Guide: Click Here

Schedule a Webex meeting

Webex provides several methods to schedule a meeting. It provides tight integration with MS Outlook/Office 365 to make scheduling easy and quick.

Method 1: Left-hand Navigation Icon

- In the Webex app, choose the Meetings icon (#5) from the left-hand menu bar.
- This displays a screen in the right pane with three options.
  - (1) Start a meeting,
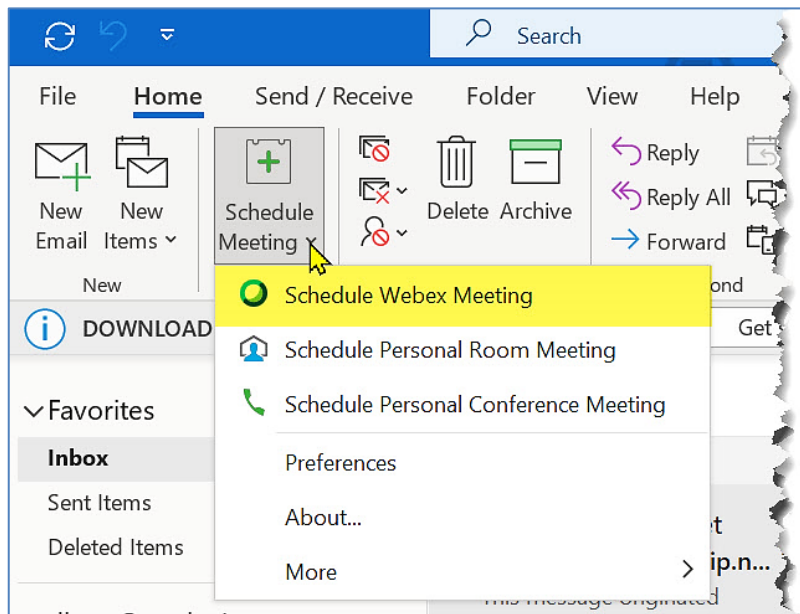 - (2) Join a meeting
  - (3) Schedule a meeting
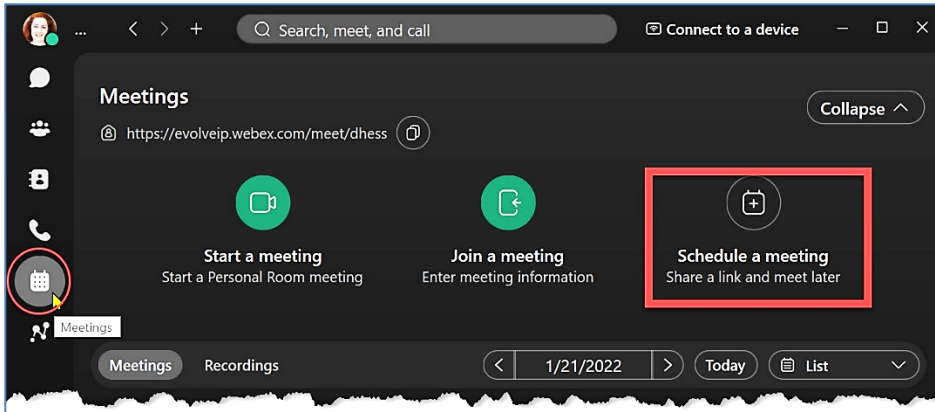
- Choose (3) Schedule a meeting. This activates the scheduling dialog window.

Guide: [Click Here](#)

Method 2: Outlook Calendar

- In Outlook, select the calendar.
- On the menu bar select the icon labeled Schedule Meeting
  - Select Schedule Webex Meeting

- This launches a new window for a calendar invite.

- Fill in the required Outlook fields.

- Webex automatically populates the meeting invite links .

This example shows the calendar event after the recipient receives it. Note the "Join" meeting information has been added.
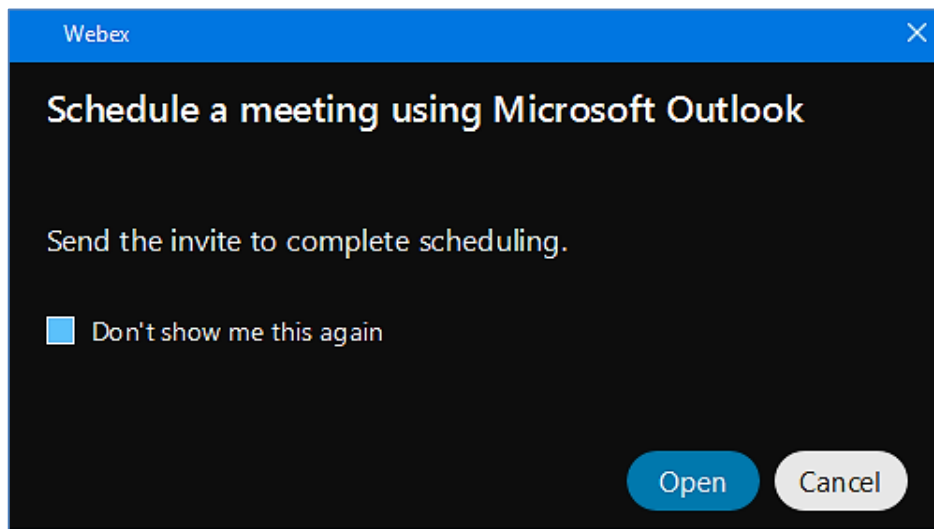
Guide: <u>Click Here</u>

Method 3: Webex Messaging Icon

- In the Webex app choose the Messaging icon.
- A new dialog box appears to the right.
    - Choose a contact,.
    - Choose "Schedule" on the menu bar in right window and select "Schedule a Meeting".
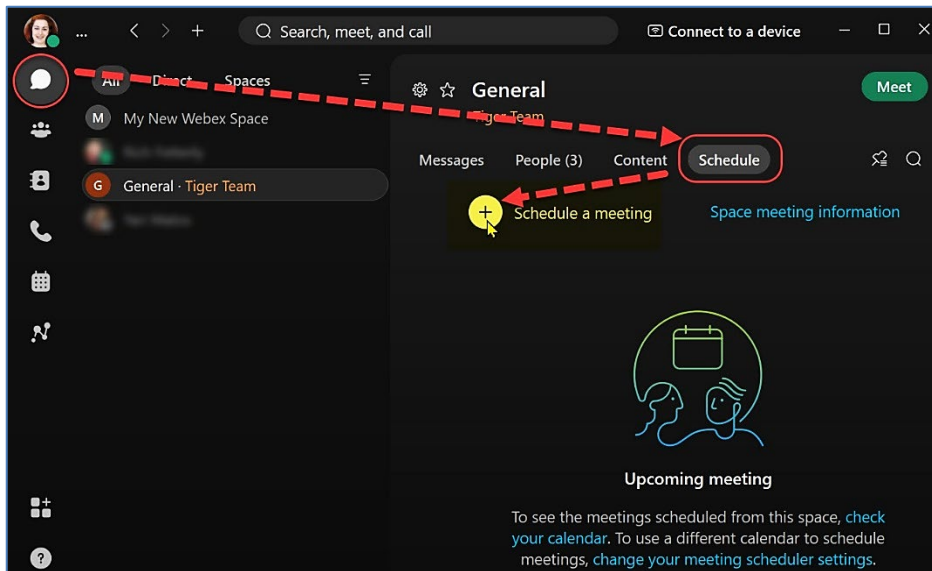
- A new dialog box appears asking if you want to schedule a meeting using Outlook.

    - Select "Open" to open Outlook.
    - Click "don't show this again" so it goes straight to Outlook to set up a meeting.

Guide: <u>Click Here</u>

Using Webex Spaces (Formerly UC-One My Room)

UC-One provided a feature called My Room that allowed for collaboration among teams. Webex provides the same functionality in Spaces.

Improvements in Webex include *File Sharing*, *Whiteboards*, *Links* and *Recordings*. These new features can be found in the **Spaces** area under Content.
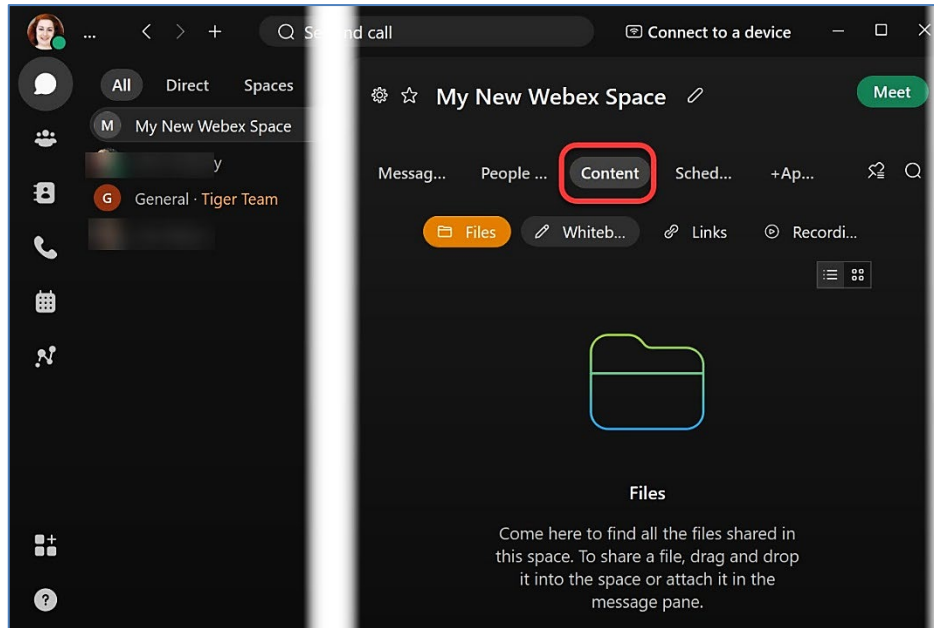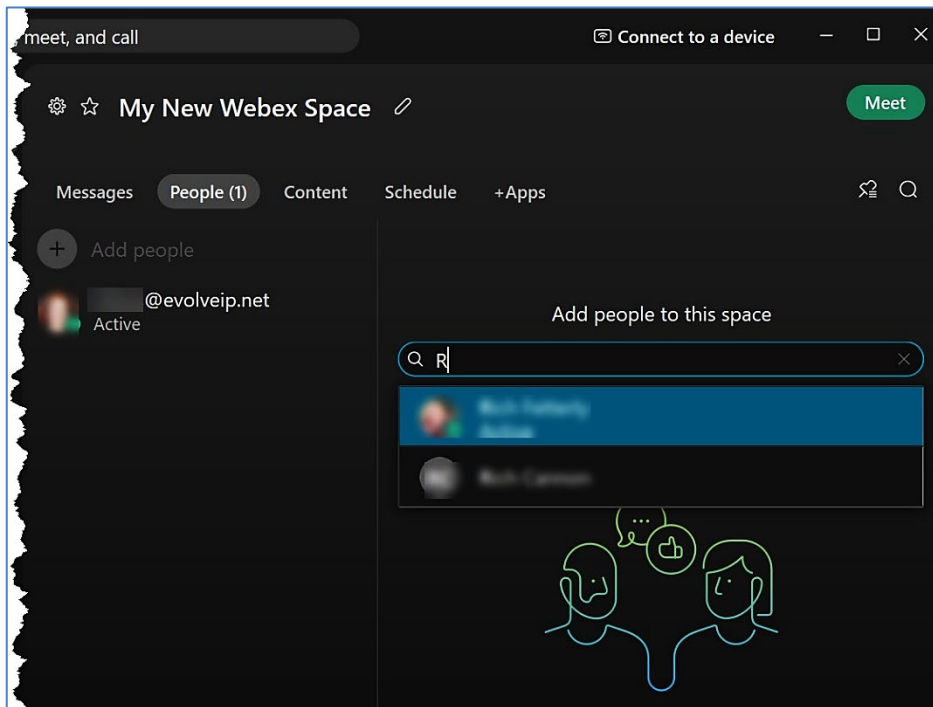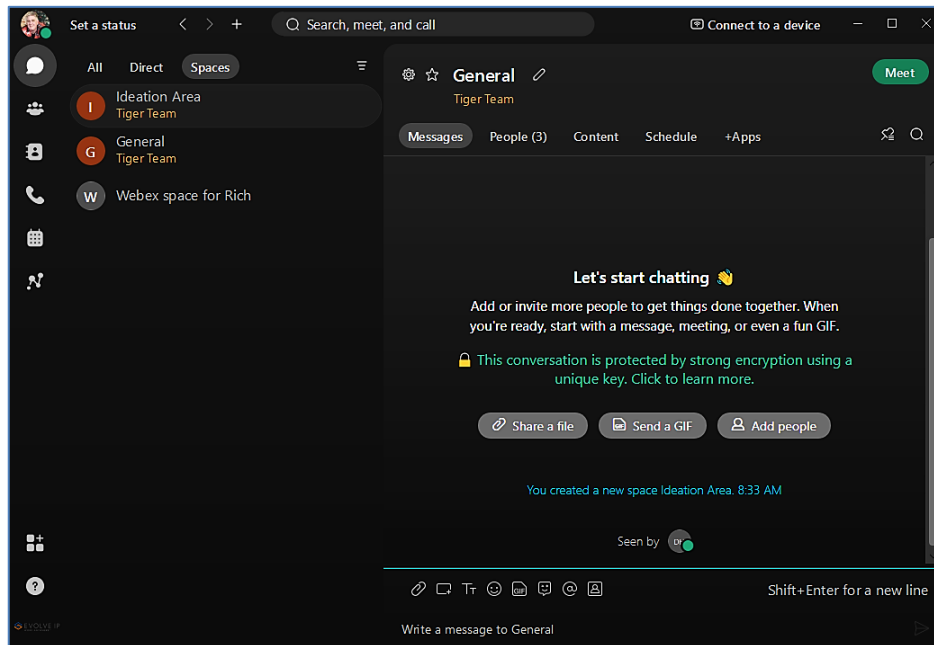

Create a Space

- To create a Space, use the "+" icon at the top of the screen.
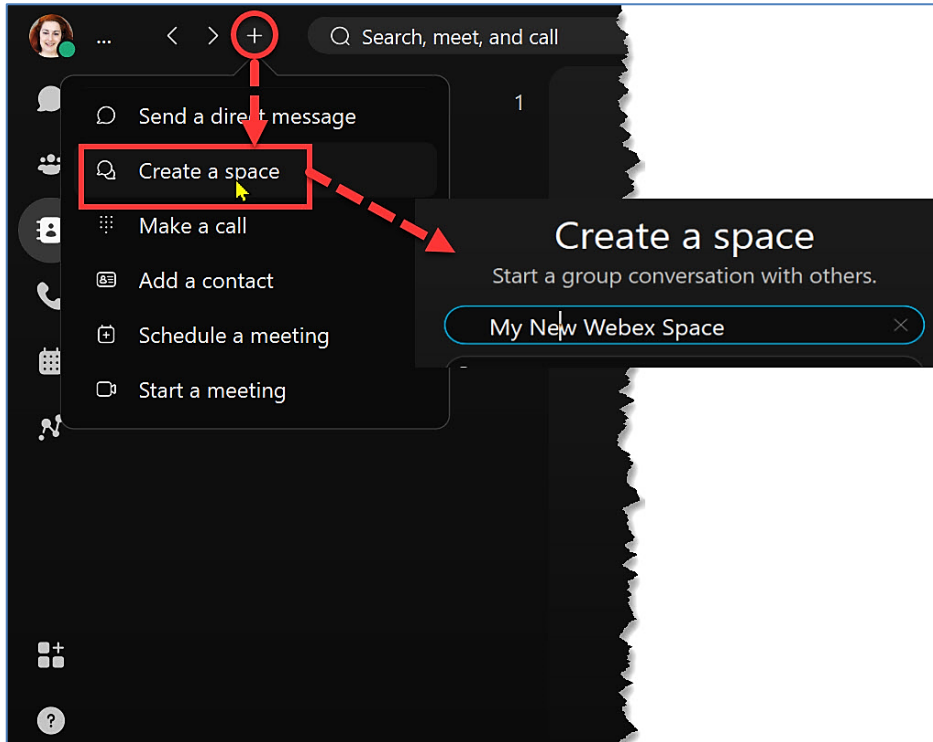
- Webex displays a new drop menu. Choose the second option Create a space

- You will be prompted to name the space (required) and given the option to add people by name or e-mail.
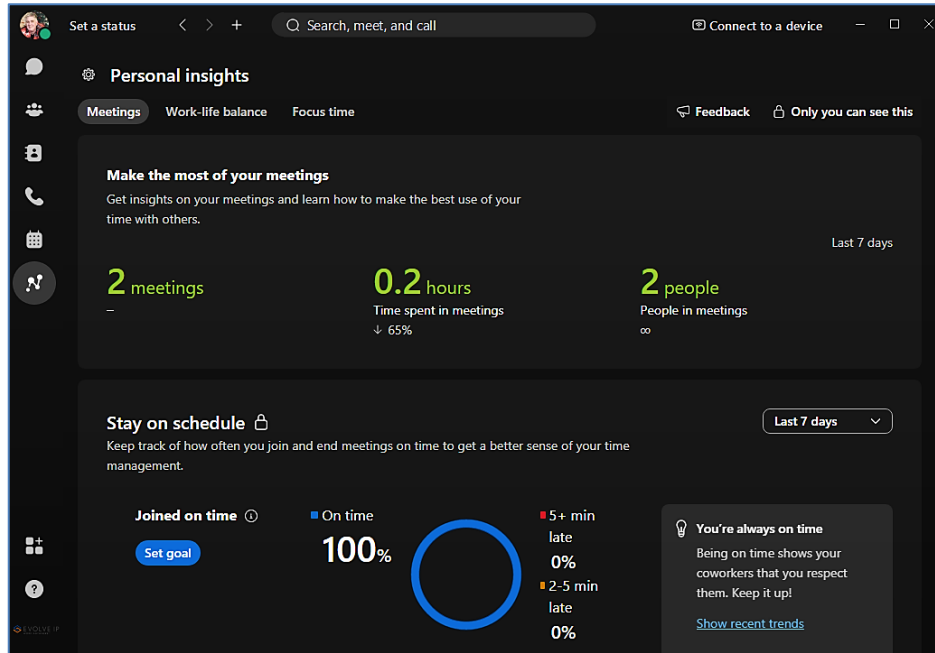
Example after Space is created

You can always get to Spaces from the Messaging icon on the left toolbar.

Guide: Click Here

Personal Insights Overview

This is a new feature which was not available in UC-One. It provides user metrics about meetings and work-related information.

Webex describes this feature as the following:

"Personal insights leverages the power of the Webex App messaging and meeting platforms to deliver personalized insights and analysis that increase and promote personal well-being, build better quality connections, and a more inclusive work experience for all."

Guide: [Click Here](#)

Voicemail

If you have Voicemail enabled there will be a Voicemail icon on the left tool bar below the phone icon; here the icon is in a red circle. When in this menu choose a Voicemail and select "Play voice message".
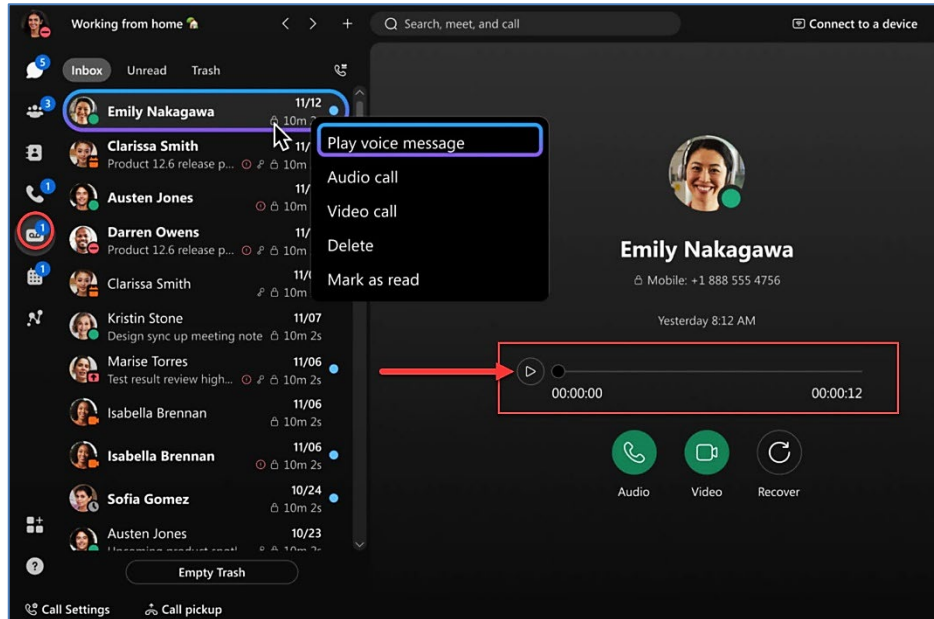
Further information on these features can be found at the below links.

How to listen to voice messages: [Click Here](#)

How to configure voice mail: [Click Here](#)

Helpful Links

Webex

[Get started with the Webex Meetings web app](#)

[Webex Meetings web app meeting functionality](#)

[Webex Meetings and Webex Webinars accessibility features](#)

[Meetings Web app supported operating systems and browsers](#)

UC-One

[UC-One Desktop User Guide](#)

[UC-One Desktop Quick Reference Guide](#)

[UC-One Collaborate Full Desktop User Guide](#)

[UC-One Collaborate Installation Guide](#)

Additional Old UC-One Links:

Office Location(s)

Evolve IP - KOP: KOP | 630 Allendale Rd

Description

Please uninstall current UC-One and install the following:

A , BCD Click Here

A , BCD v22.9.21 Click Here

F - With ACCESS CODE NP8Z11 Click Here

Aitech – Click Here

Client Locations

Evolve IP - KOP: KOP | 630 Allendale Rd

Status page update- UC One issue -Info Posted

UC App for all platforms(INT-9130)

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