



End User Guide

Masergy Calling for Microsoft Teams

Voice integration for
Masergy UCaaS with
Webex

August 2021

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Overview

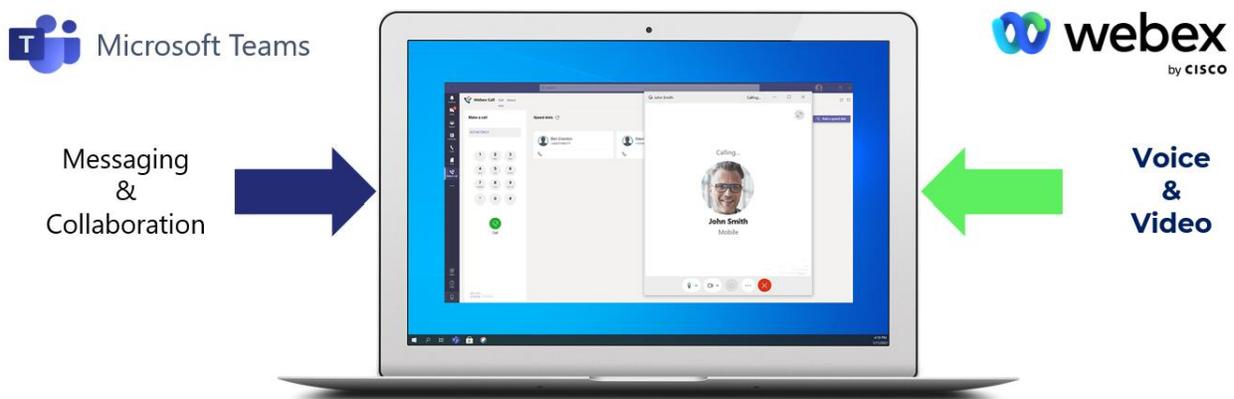
This document describes the voice calling capabilities for Microsoft Teams by integrating Masergy UCaaS with Webex. In this scenario, the public switch telephone network (PSTN) and calling capabilities are provided by Masergy's Hosted UC platform while Microsoft Teams is used for collaboration features such as chat and file sharing.

Users can easily escalate a Microsoft Teams chat with a co-worker into a rich Masergy Hosted UC video interaction with the click of a button. Users can also use the Webex dial pad in Microsoft Teams to dial numbers. Users can access the capability of their Webex voice calling directly from Microsoft Teams.

The integration allows users to call using a dial pad or turn a chat conversation into a call using Microsoft Teams on Windows, Mac, Android, iPhone, and iPad devices. Users can also call Microsoft Azure Directory and Outlook contacts and add these contacts to a list of speed dials.

Summary

Masergy UCaaS with Webex and Microsoft Teams integration allows users to start Webex voice and video calls from inside the Microsoft Teams application, allowing users to maintain their Microsoft Teams experience but leverage Masergy Hosted UC to place and make calls using Webex. However, no Webex signaling/media takes place within Microsoft Teams. The Webex plugin added to Microsoft Teams effectively places a call using Webex. In the Masergy Calling for Microsoft Teams solution, all signaling/media is terminated within the Webex application using Masergy Hosted UC.



The integration can be broken down into two parts to deliver features and functionality:

1. Microsoft Teams, which provides Messaging and Collaboration
2. Webex, which provides Voice / Video Calling using Masergy Hosted UC

System and Software Version Requirements

The following are the requirements for Microsoft Teams integration:

- Microsoft Teams desktop app (<https://www.microsoft.com/en-us/microsoft-365/microsoft-teams/download-app>)
 - Microsoft Windows
 - Apple macOS
- Webex desktop app (<https://www.webex.com/downloads.html>)
 - Microsoft Windows
 - Apple macOS
- Webex mobile app
 - Webex mobile (iOS and Android) (<https://www.webex.com/downloads.html>)

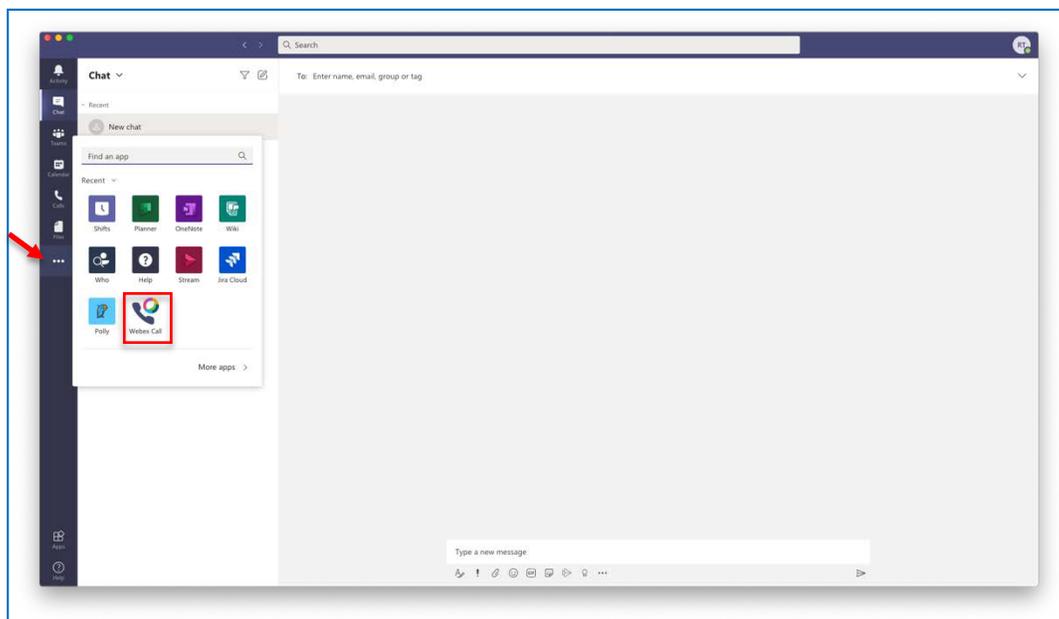
Please note if during the **mobile device** installation and sign-in procedure; please be sure to **allow** all notifications. This will ensure you will receive all notifications of incoming calls, messages, and voicemail notifications. This applies to all mobile clients.

Overview for Desktop Users

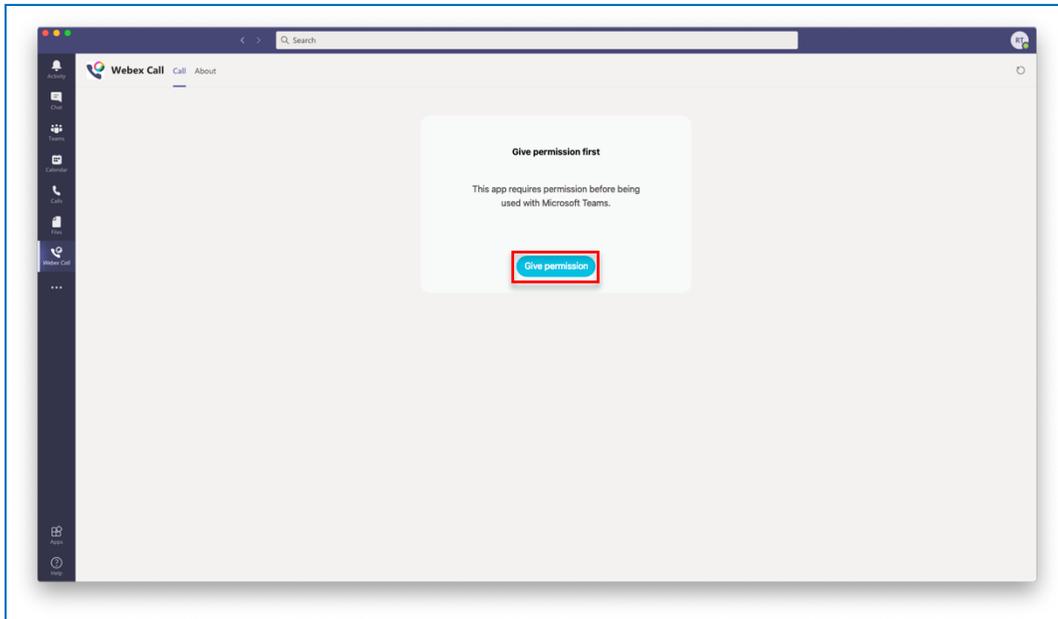
Note, all screenshots depicted in this document are taken from an Apple macOS desktop. The Microsoft Windows experience will be similar.

Before You Start

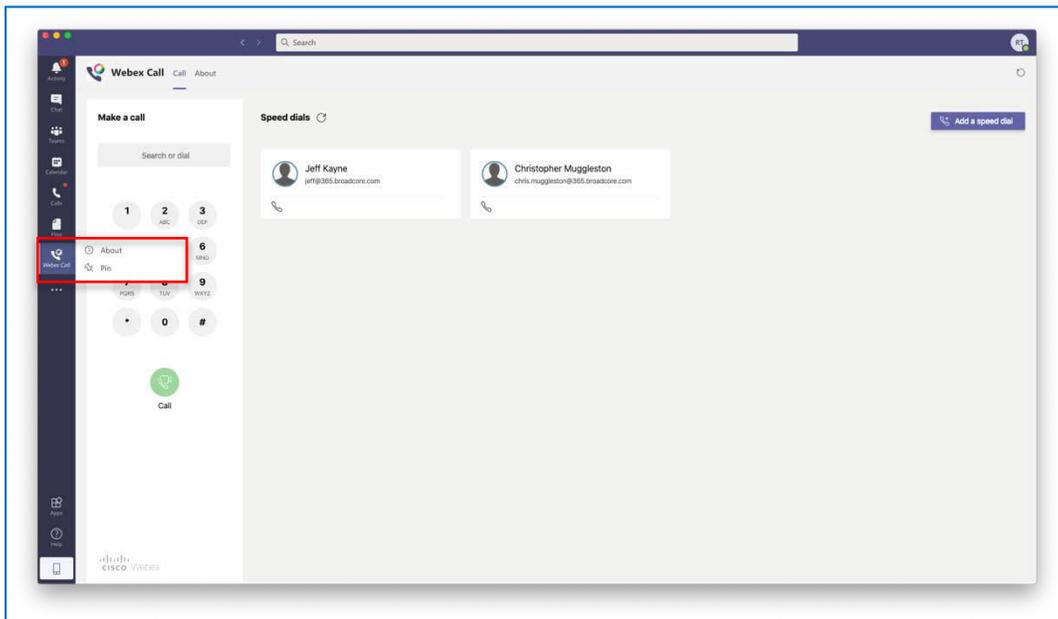
Login to both the Microsoft Teams and Webex applications using credentials provided to you by your administrator. Make sure your administrator or your MS Team space owner has installed the Webex Call app in Microsoft Teams. If it is installed, you will see the “Webex Call” icon in the left-hand panel or if you select “...” in the left panel/bar and search for Webex Call.



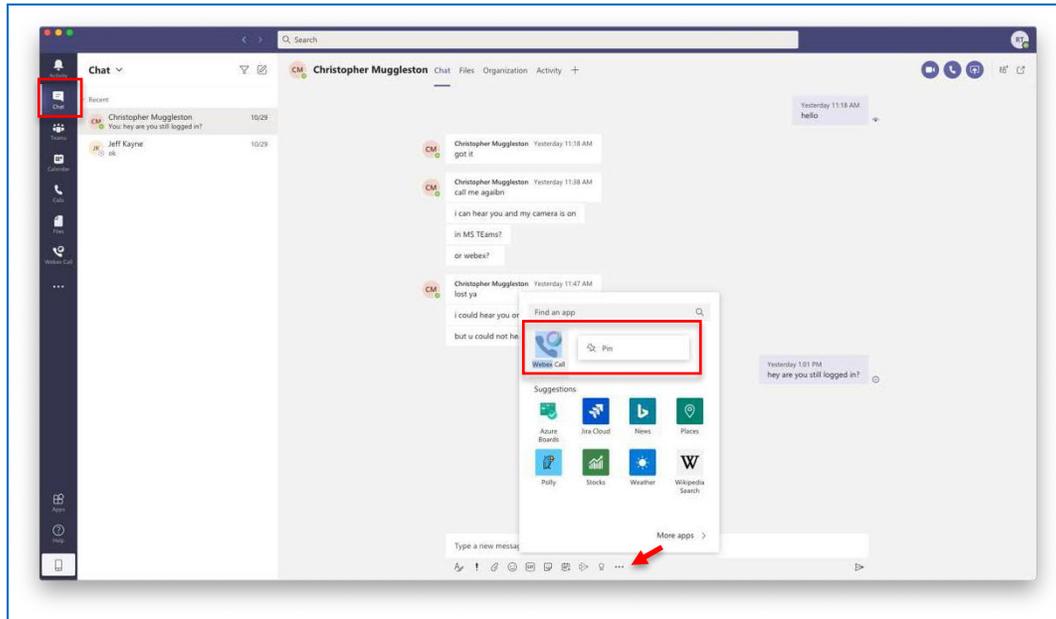
Select it and give permissions for the “Webex Call app” to be used by Microsoft Teams.



Pin the Webex app on the left-hand panel by right clicking on the “Webex Call” App and selecting Pin:

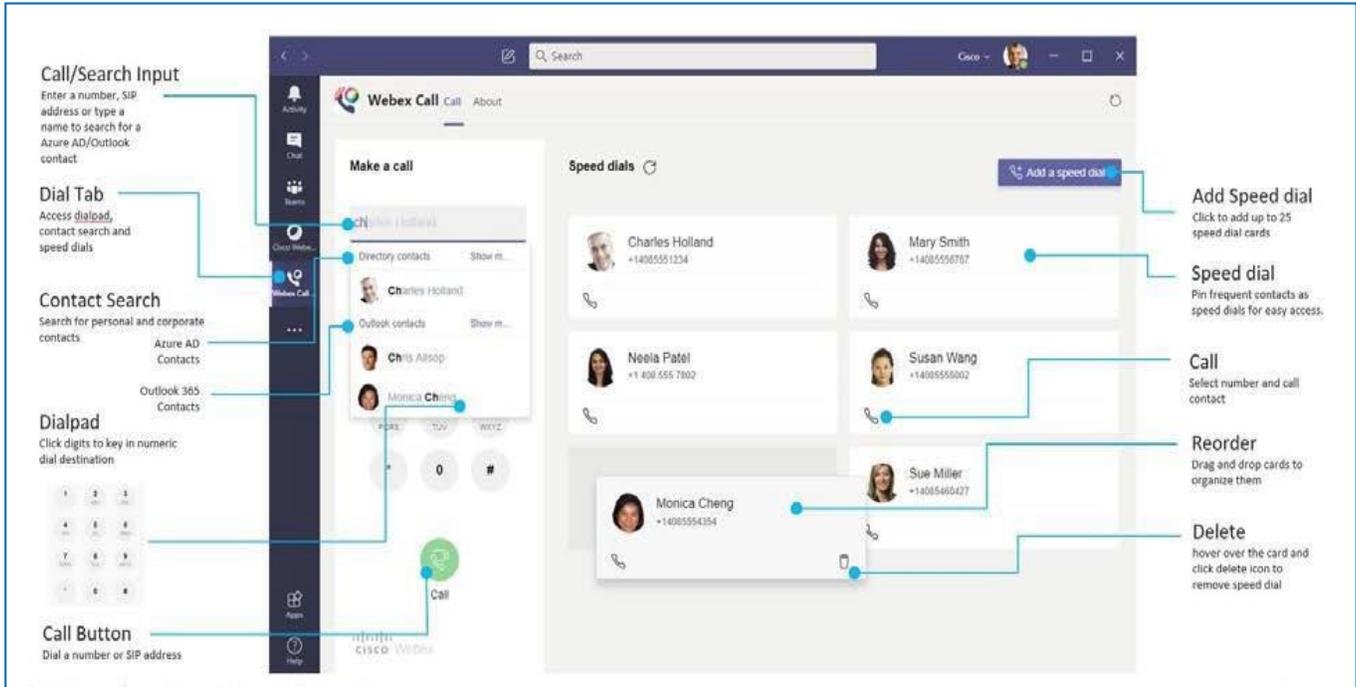


Next, on the left-hand pane, select the Microsoft Teams “Chat” icon and select the “...” located near the icons underneath the chat window to pin the “Webex Call” app to the chat window. As before, right click on the “Webex Call” app to pin it to the chat window.



Webex Calling for Microsoft Teams

The figure below highlights the main features of the Webex Call app used for voice calling from within the Microsoft Teams client.



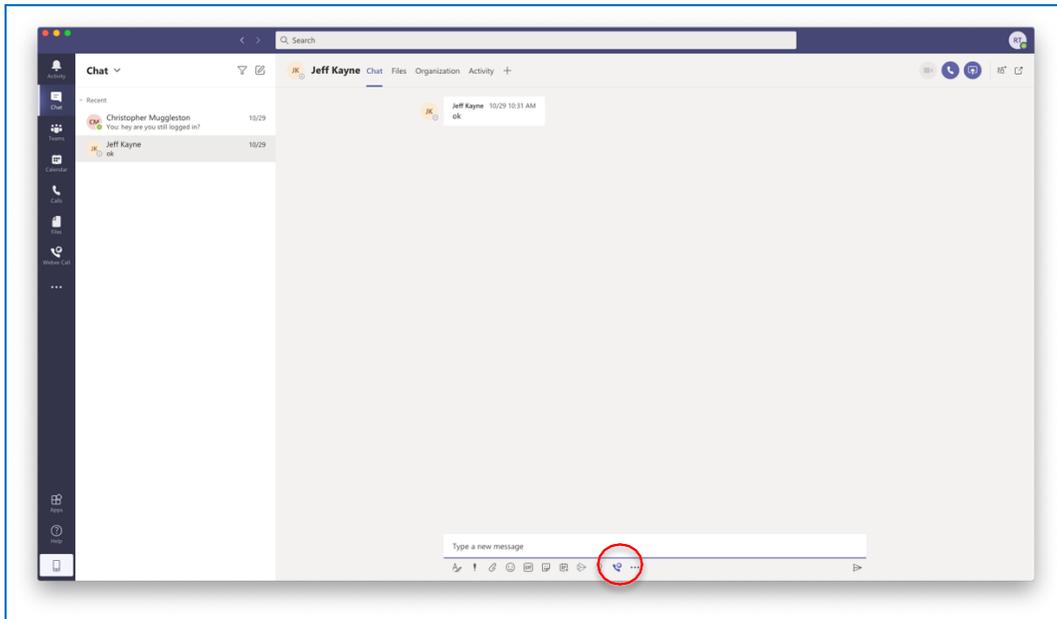
It is important to reiterate that the integration of Masergy Calling for Microsoft Teams results in no Webex signaling/media taking place within Microsoft Teams. The Webex plugin added to Microsoft Teams merely places a voice call to the PSTN and video calling to users using Webex from within the Microsoft Teams client application. All signaling/media is terminated within the Webex application using Masergy Hosted UC infrastructure for voice calling from your PC or Mac.

Masergy's hosted integration of Webex empowers IT departments to provide PSTN calling functions from within their company's existing Microsoft Teams app deployments.

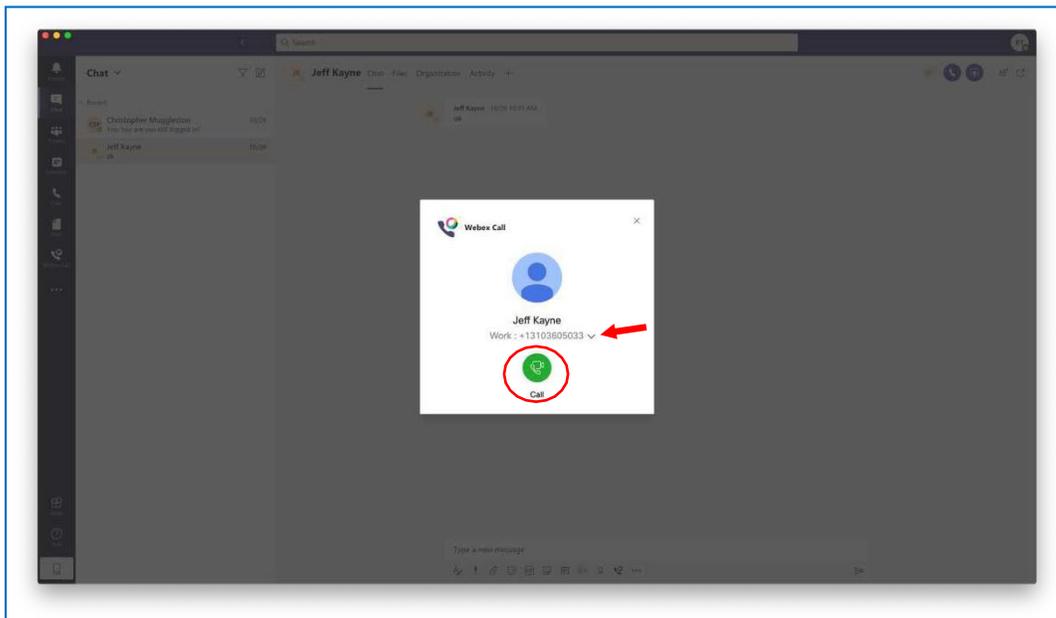
Make a Call in a 1:1 Conversation Tab

When chatting with someone one-to-one (1:1), click Webex Call at the bottom of the window, circled in red, in the figure below. At least one message must be made with the person before a call can be made.

Note: If the user has not already logged into the Webex client, they will be prompted to login using credentials provided to you by your administrator.



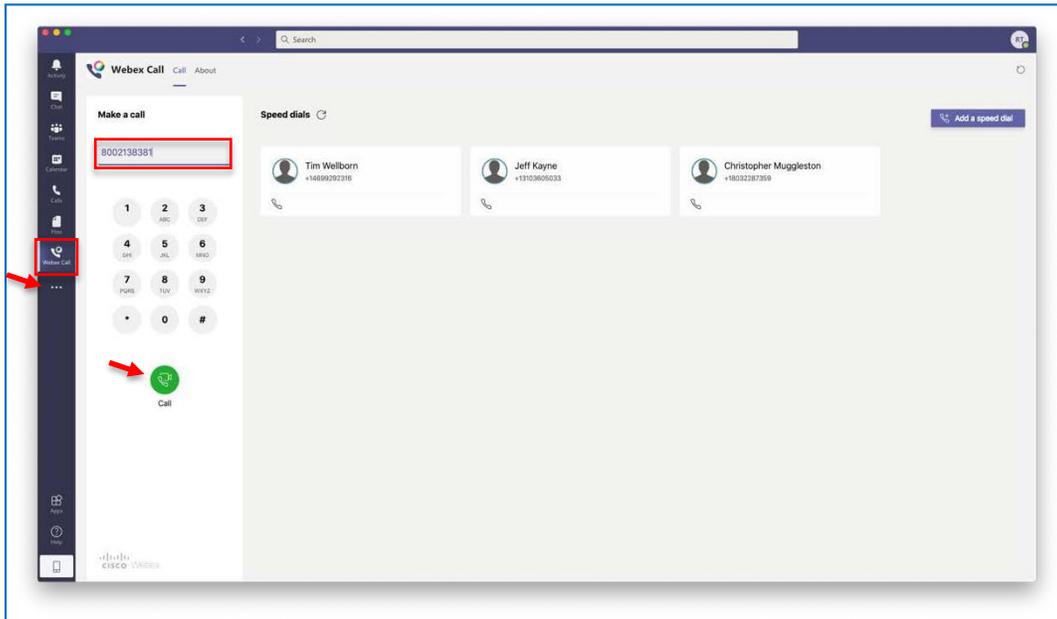
The user will be prompted with a dialog window and can simply make a call with the default number or select the default number dropdown for more contact options. Press the call button to complete.



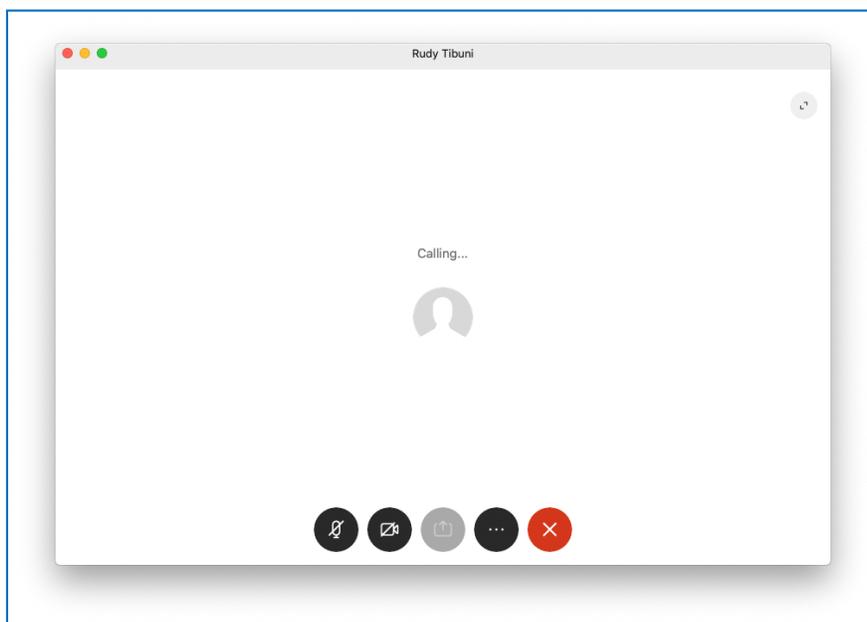
Make a Call Using the Dial Pad

In the left side menu bar, click **Webex Call** (if Webex Call is not visible, select the “...” Menu to view your installed apps and select **Webex Call**).

Enter the number of the person you want to call and then click the green “Call” button.

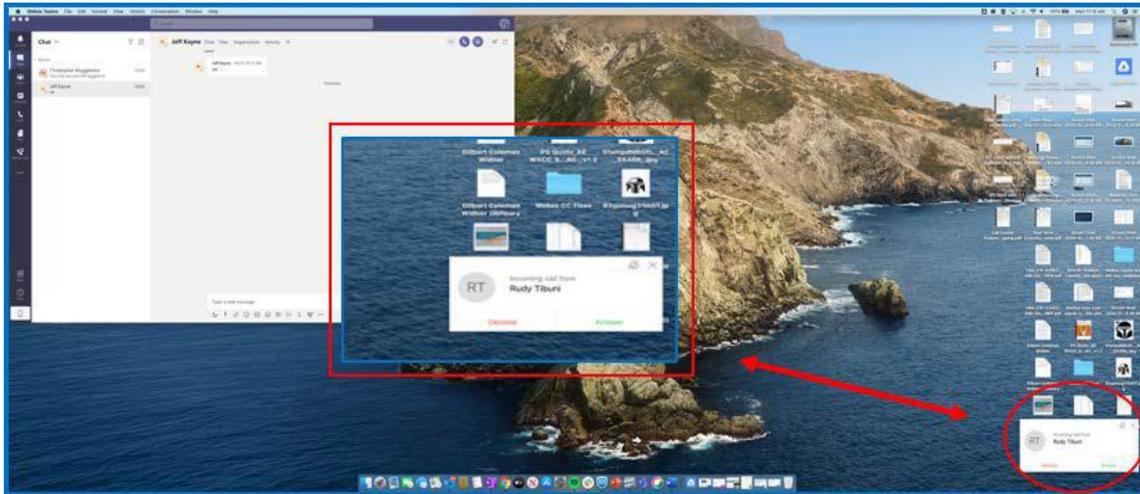


The Webex app will open in a new window to initiate the call.

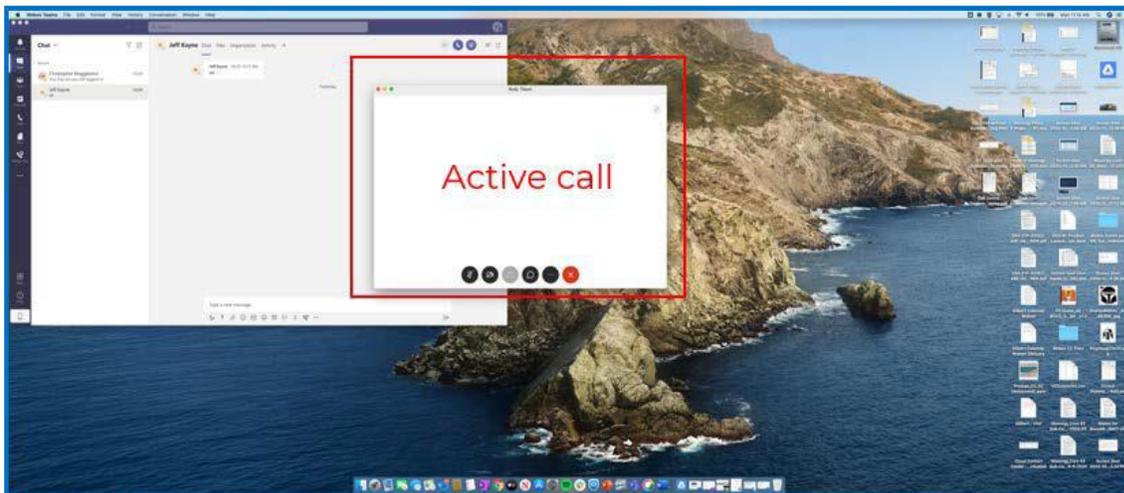


Receiving Incoming Calls

An incoming call notification will appear on the desktop, circled in red in the screenshot below. Upon selecting “Answer”, the Webex application will automatically open for you to answer the incoming call. The call may also be declined by selecting “Decline”.

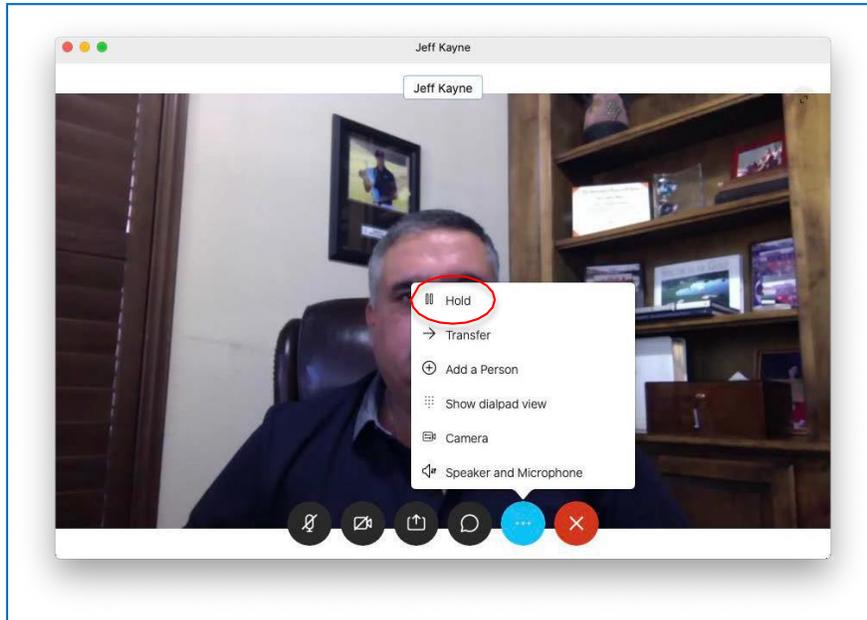


Once answered, the Webex Team client will display the active call.

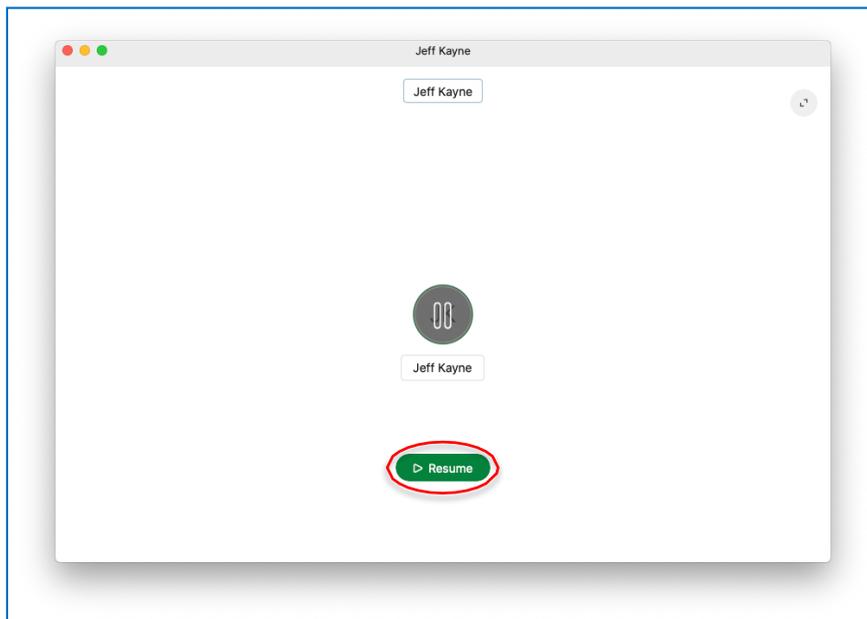


Placing a Call on Hold

To place an active call on hold, simply hover over the Webex active call window to reveal the call controls. Select the “...” to reveal the active call menu options and select “Hold”.

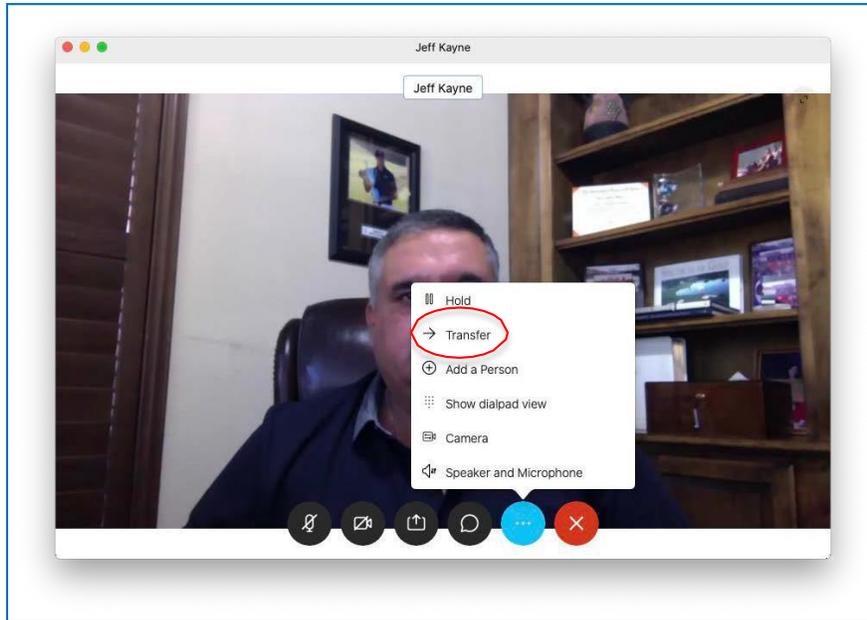


When the call is held, the held call window will be displayed. Simply press the “Resume” button to resume the conversation.

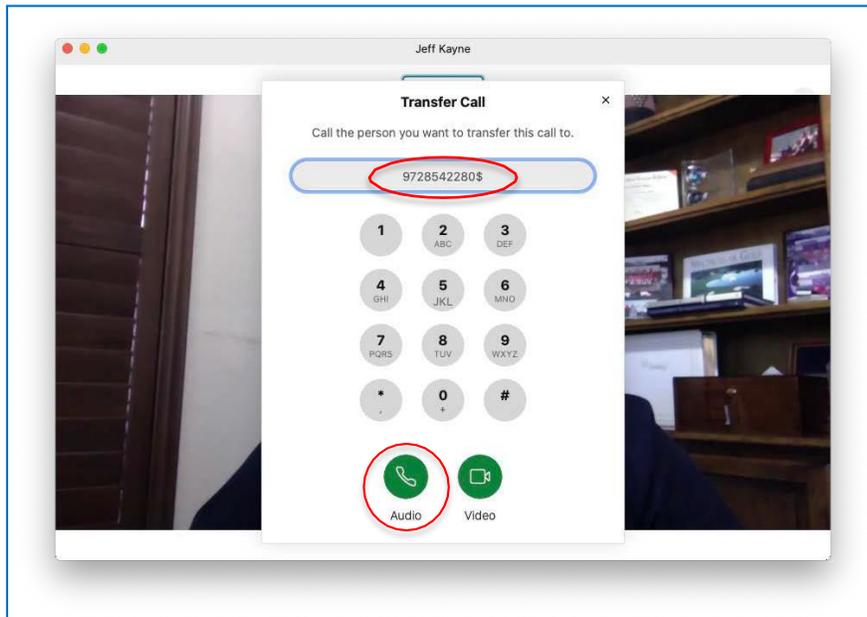


Call Transfer

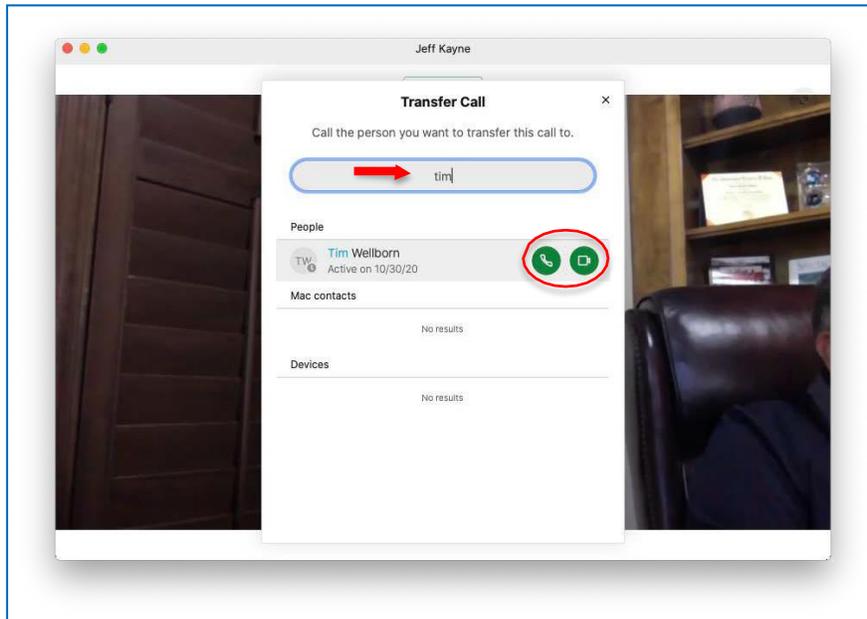
To transfer an active call to another user or PSTN number, simply hover over the Webex active call window to reveal the call controls. Select the “...” to reveal the active call menu options and select “Transfer”.



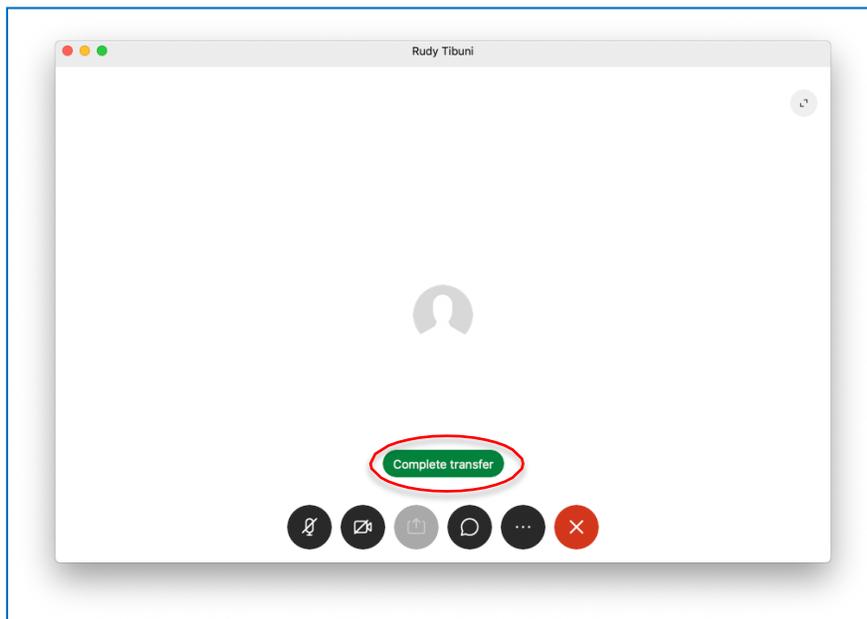
If you are dialing a PSTN number, simply type in the phone number you wish to dial and select the green phone button.



If you are dialing another user in your Azure directory or Outlook contacts, simply type in the name of the user and select the green phone or video button to dial the contact you wish to transfer the call to.

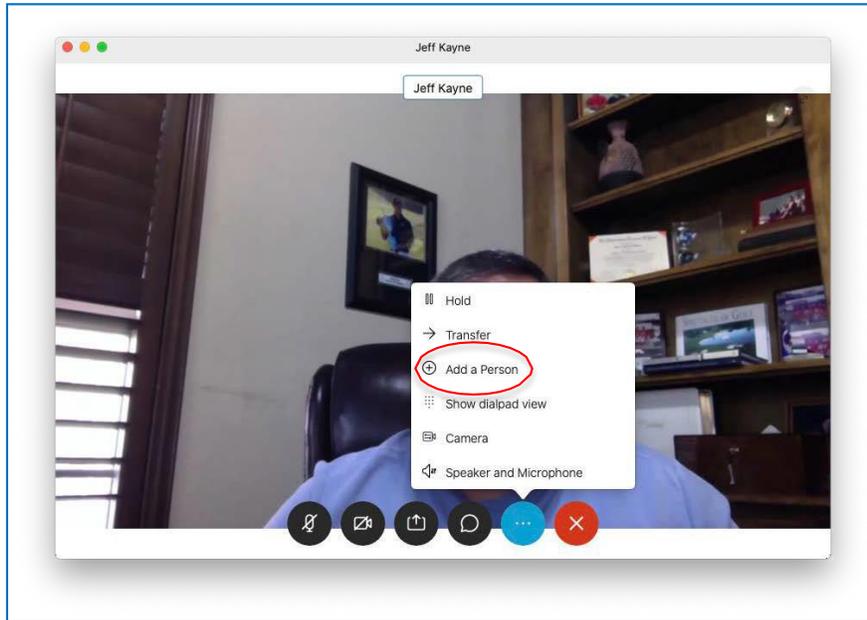


Once the called person has answered, the transfer may be completed by selecting the "Complete Transfer" button.

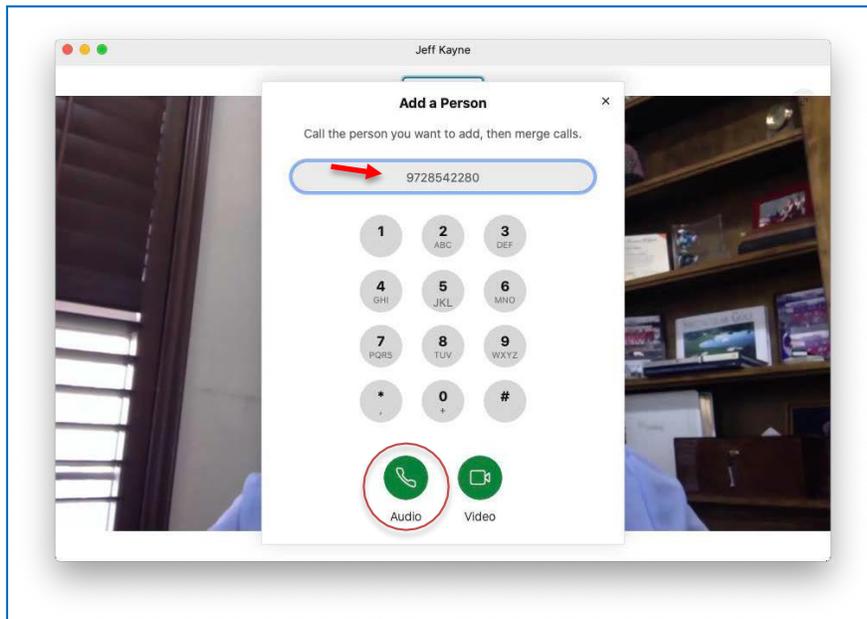


Conference Calling

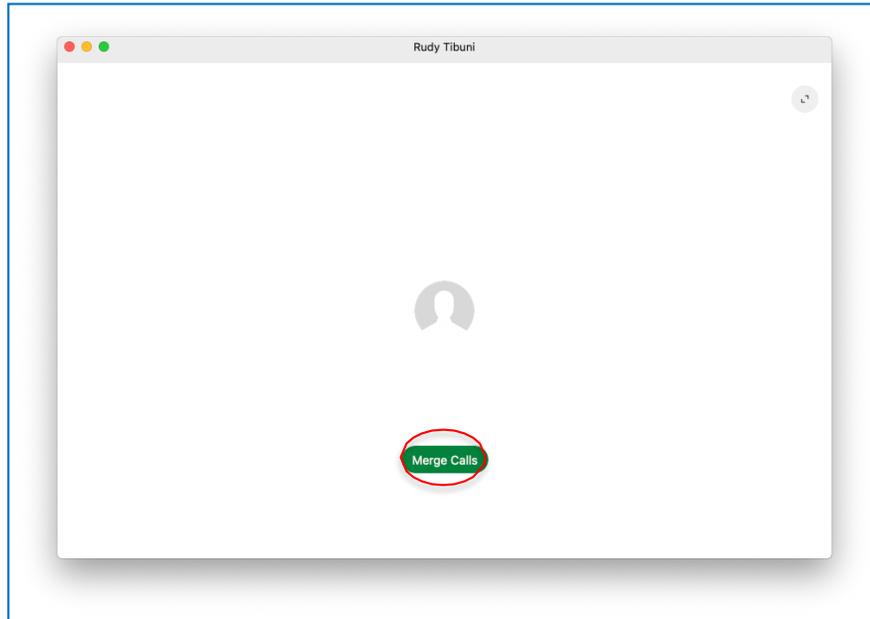
To add another person or PSTN number to an active call, simply hover over the Webex active call window to reveal the call controls. Select the “...” to reveal the active call menu options and select “Add a Person”.



Begin typing the name of the person or PSTN number of the contact you wish to conference in and select the green phone button.

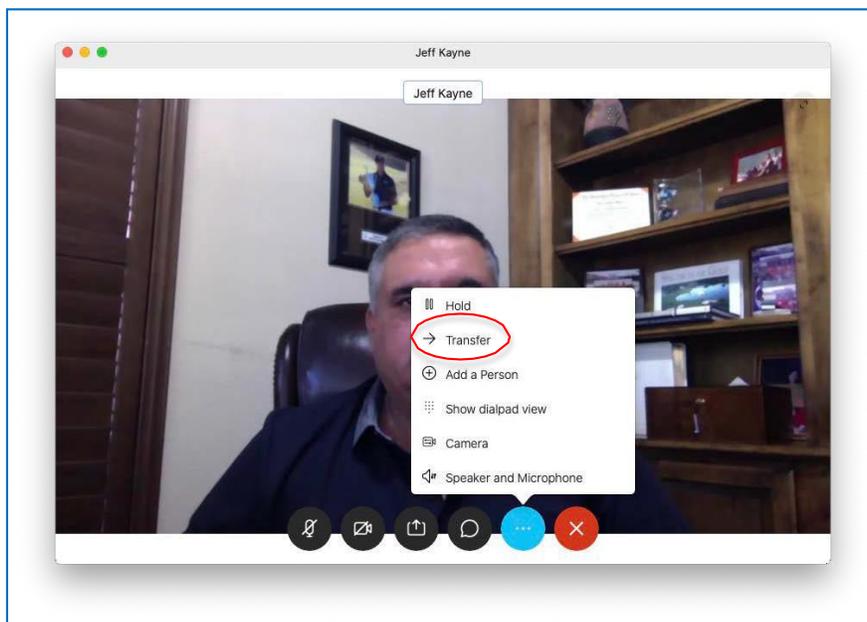


The calling window will appear and when the other party answers, complete the conference by pressing the “Merge Calls” button.

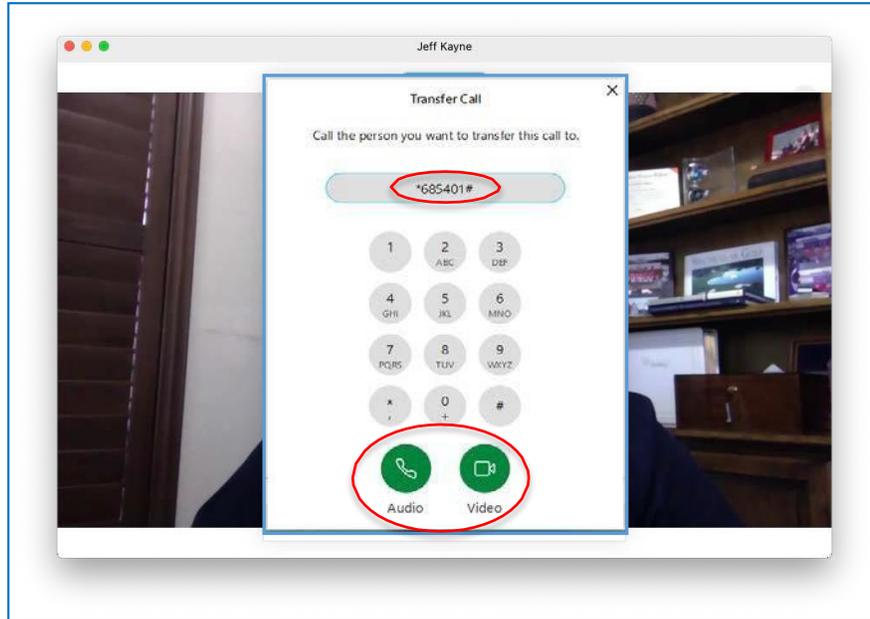


Call Park and Call Pickup

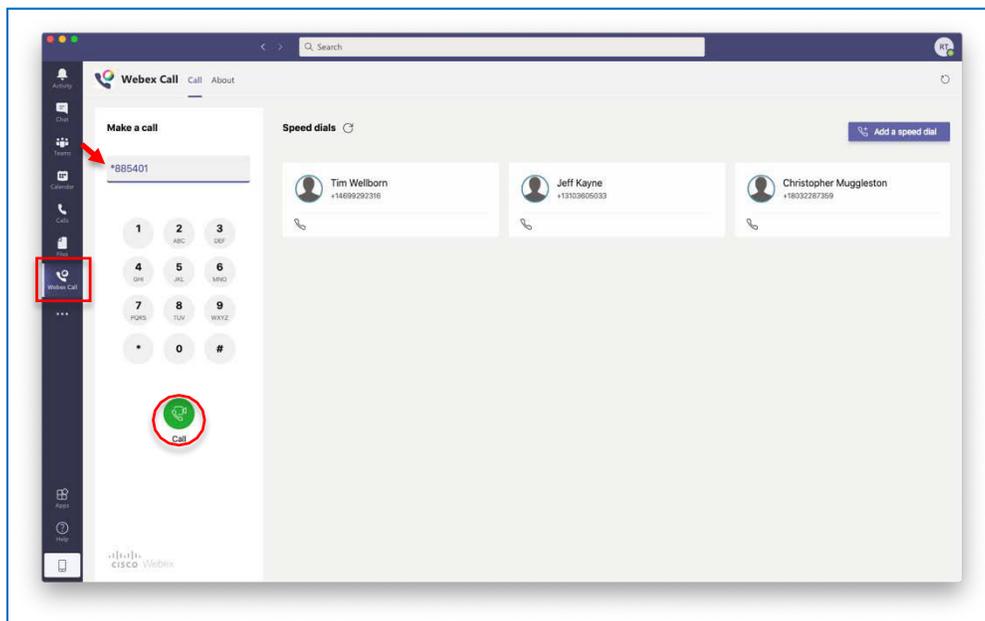
Active calls may also be parked using FAC (feature access codes) provided by your administrator and if configured. In order to park the call, similar to call transfer, simply hover over the Webex active call window to reveal the call controls. Select the “...” to reveal the active call menu options and select “Transfer”.



In the transfer popup window, simply enter the Call Park feature access code (FAC), the extension number you want to park the call to, and the “#” sign, followed by either the **Audio** or the **Video** call buttons. In the figure below, *68 is the call park FAC and 5401 is the extension the call will be parked to.

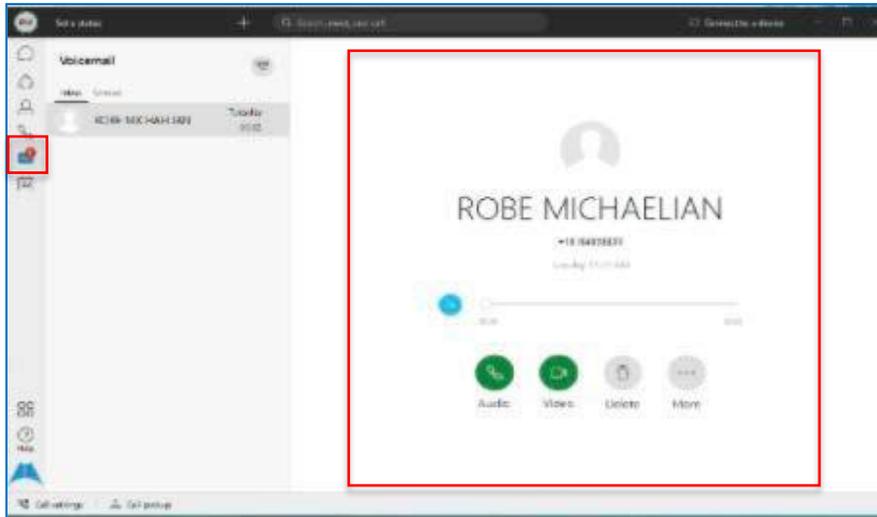


To retrieve the parked call, simply go back to the “Webex Call” app and type in the retrieve feature access code, the extension number that the call was parked to. For example, if *88 is the call retrieve FAC, the user would enter *885401 and press the Call button to retrieve the call.



Voicemail

Voicemail is provided by Masergy's Hosted UC platform; therefore, all voicemails are accessed through the Webex client.



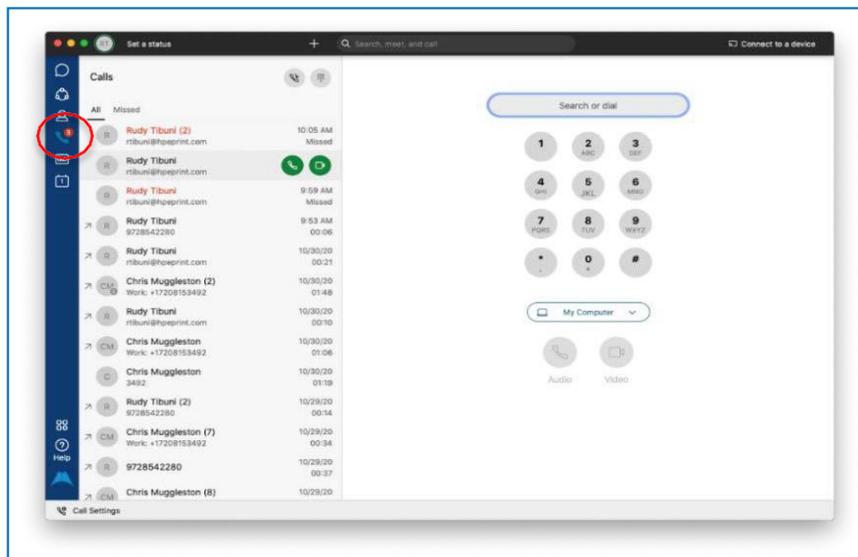
Presence and Chat

All presence and chat interactions are provided by the Microsoft Teams client.

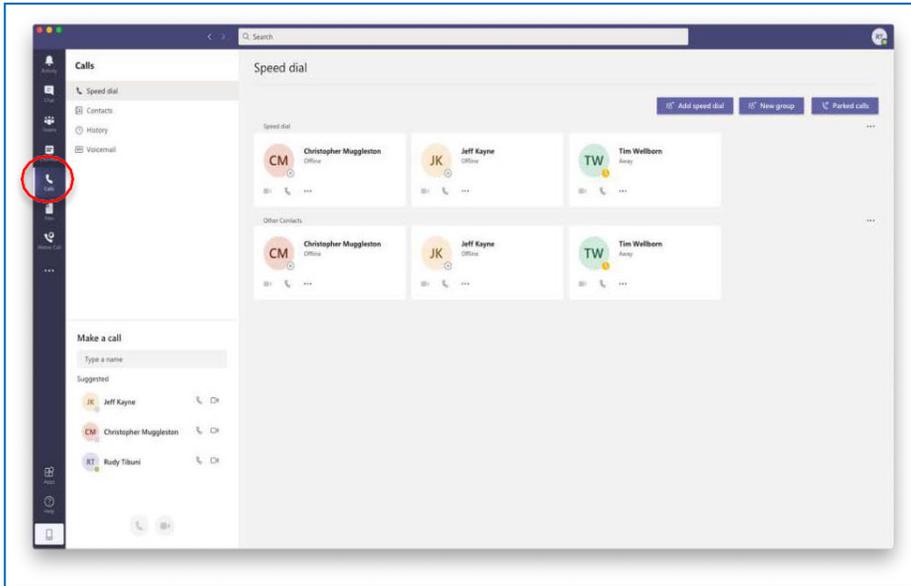
Call History

Depending on how your administrator has configured your company, call history may manifest itself in a few ways. All calls originated within the Microsoft Teams using the "Webex Call" app will have call history provided by the Webex client. Likewise, all incoming call history is also accessed through Webex.

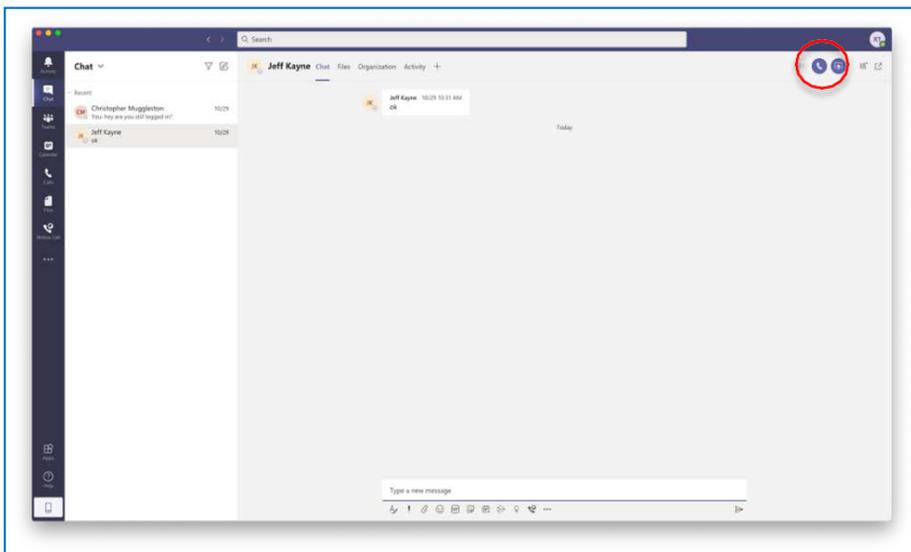
The phone icon on the left-hand panel of the Webex client accesses call history.



If your administrator has enabled point-to-point calls between two Microsoft Teams users, meaning in addition to using the “Webex Call” app to initiate a call, users can make Microsoft Teams calls directly using the “Calls” button. If your administrator did not enable point-to-point calls, the “Calls” icon in the left-hand menu will not be available.

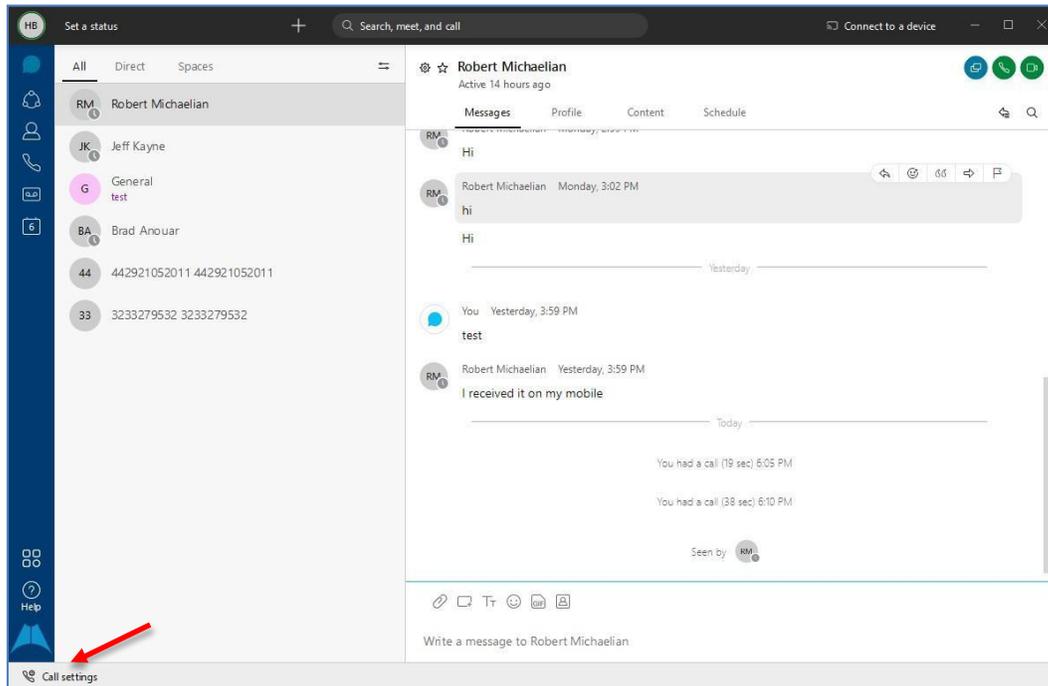


Likewise, if your administrator did not enable point-to-point calls, the “Calls” icon in the chat window will not be available.

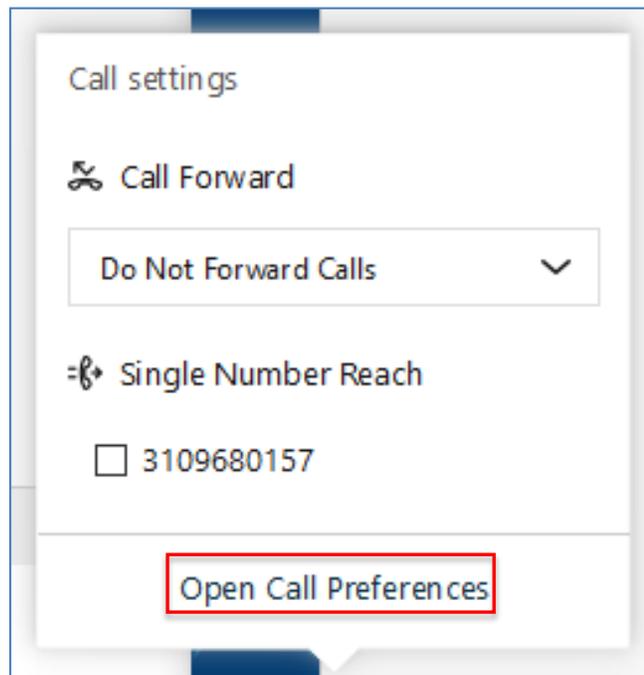


Call Forwarding

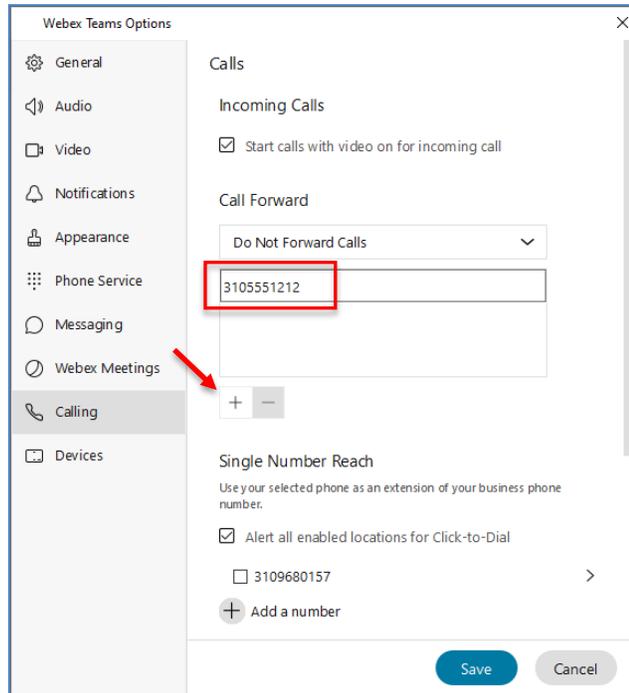
Call Forwarding allows the user to send all incoming calls to an alternate destination. To begin click on the “call settings” on the bottom left corner



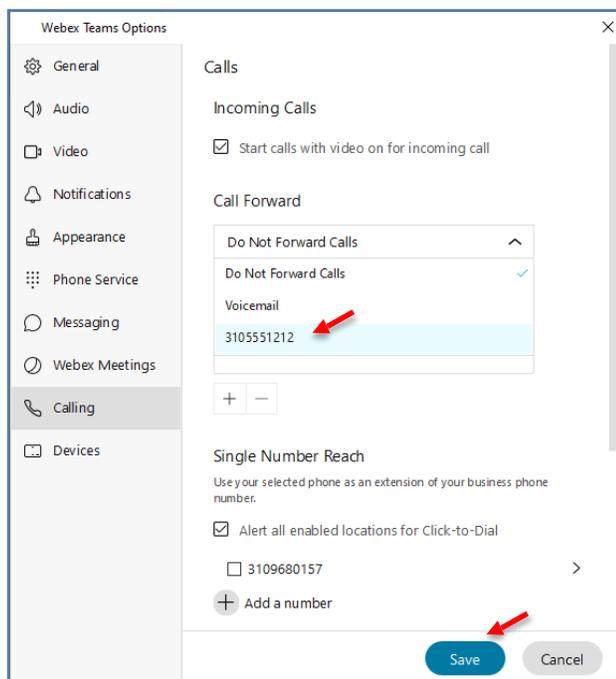
Click on open “Call Preferences.”



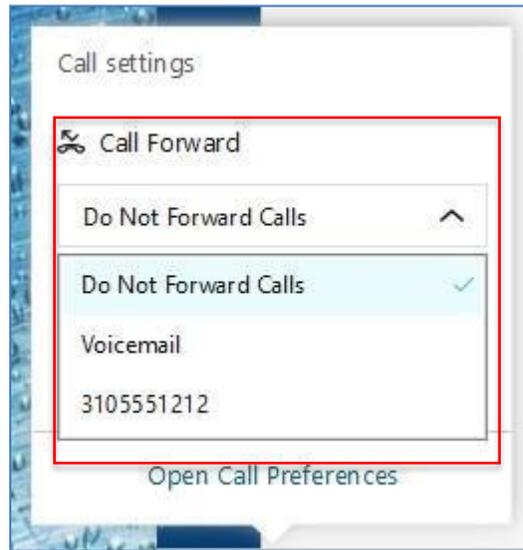
From the Calling menu, click on the “+” under “Call Forwarding” and enter the number you wish to forward the incoming calls to. To save your entry, press the enter key.



From the drop-down menu under Call Forwarding and change from “Do Not Forward Calls” to the number entered in the previous step. Select Save to save your changes and exit.



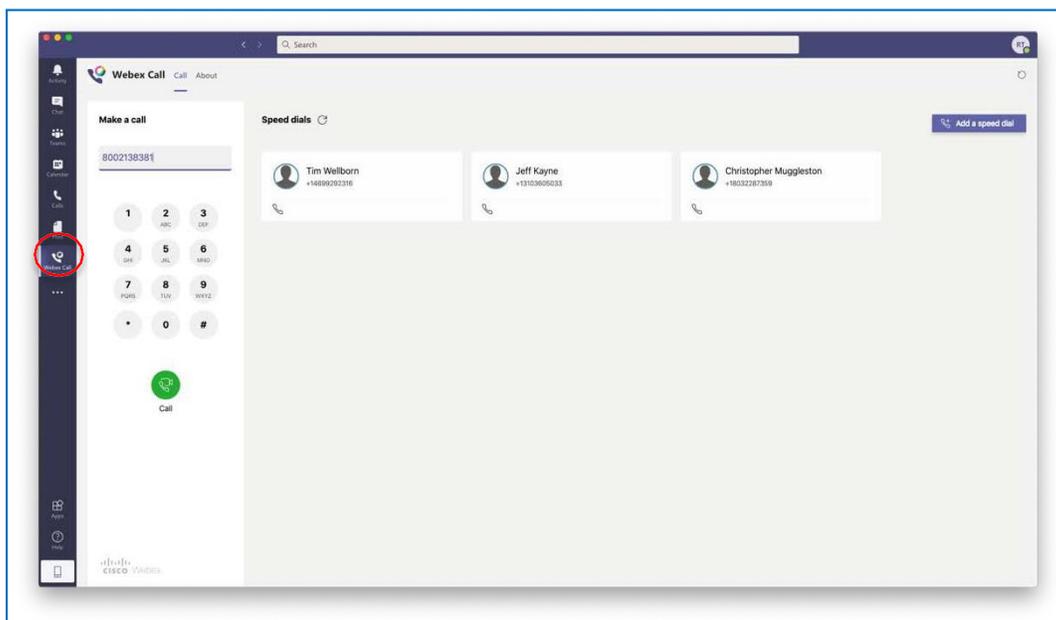
Once this is complete, all subsequent Call Forward actions can be performed via the main screen itself under “Call settings.”



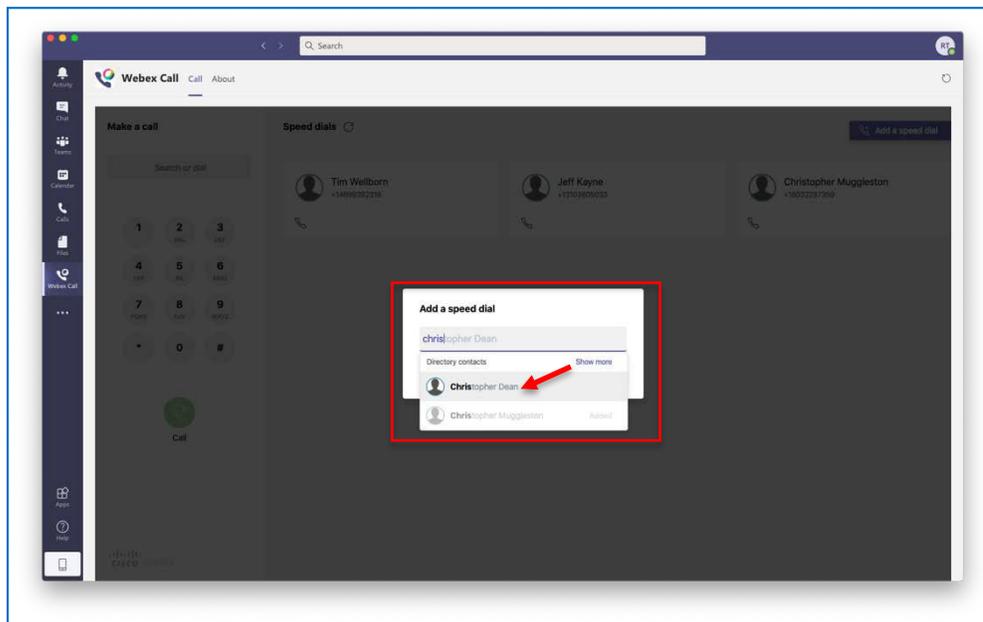
Speed Dials for Webex Calling in Microsoft Teams

Within the Webex Call app, users may manage up to 25 contacts as speed dials from their Azure directory and Outlook contacts, so they may call their most frequent contacts quickly and easily. The app will save speed dials to their Microsoft 365 profile. The indicator next to the speed dial title will indicate when speed dials are being saved to the Microsoft cloud.

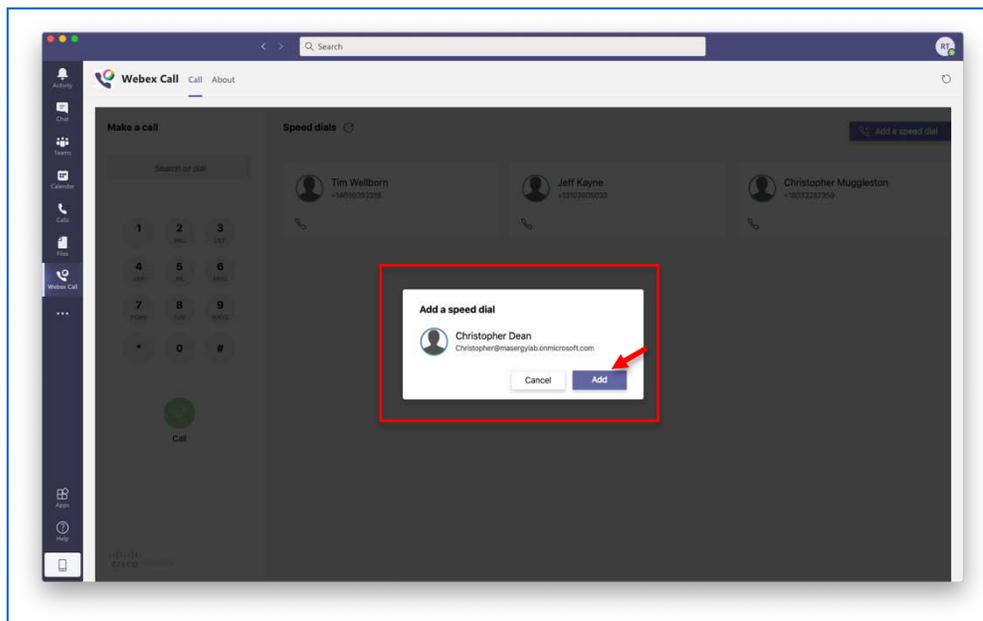
On the left-hand menu, select “Webex Call”.



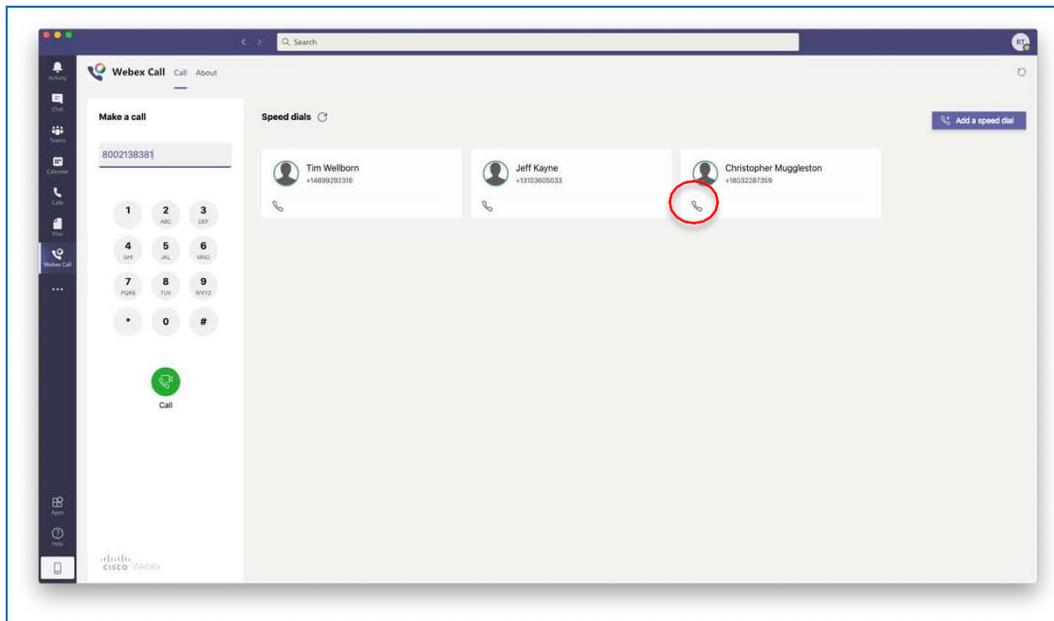
Click “Add a speed dial” and search for contact by typing their name.



Select the contact and click “Add”.



Users may now place a call to a speed dial by pressing the phone icon beneath the speed dial contact. Speed dial entries may also be arranged by simply dragging them in the window and deleted by selecting a speed dial entry and pressing the trashcan icon.



Overview for Mobile Users

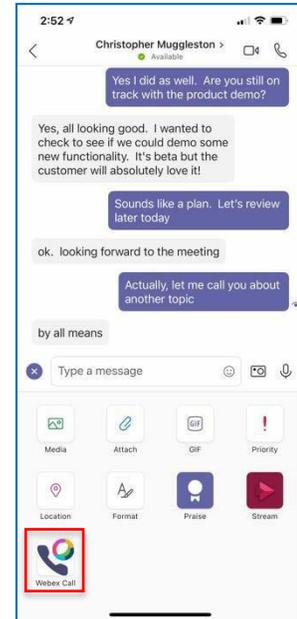
Note, all screenshots depicted in this document are taken from an Apple iPhone device. The Google Android smartphone experience will be similar.

Before You Start

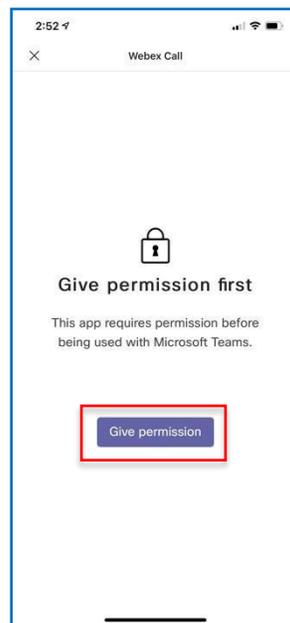
Login to both the Microsoft Teams and Webex applications using credentials provided to you by your administrator. Make sure your administrator or your MS Team space owner has installed the Webex Call app in Microsoft Teams.

To check if it is installed, from the home screen, tap “Chat”, search for the person you want to call, and then tap their name.

From the chat window, tap the “+” sign on the bottom left and if installed you will see the “Webex Call” icon in the bottom panel.



Select it and give permissions for the “Webex Call” app to be used by Microsoft Teams.



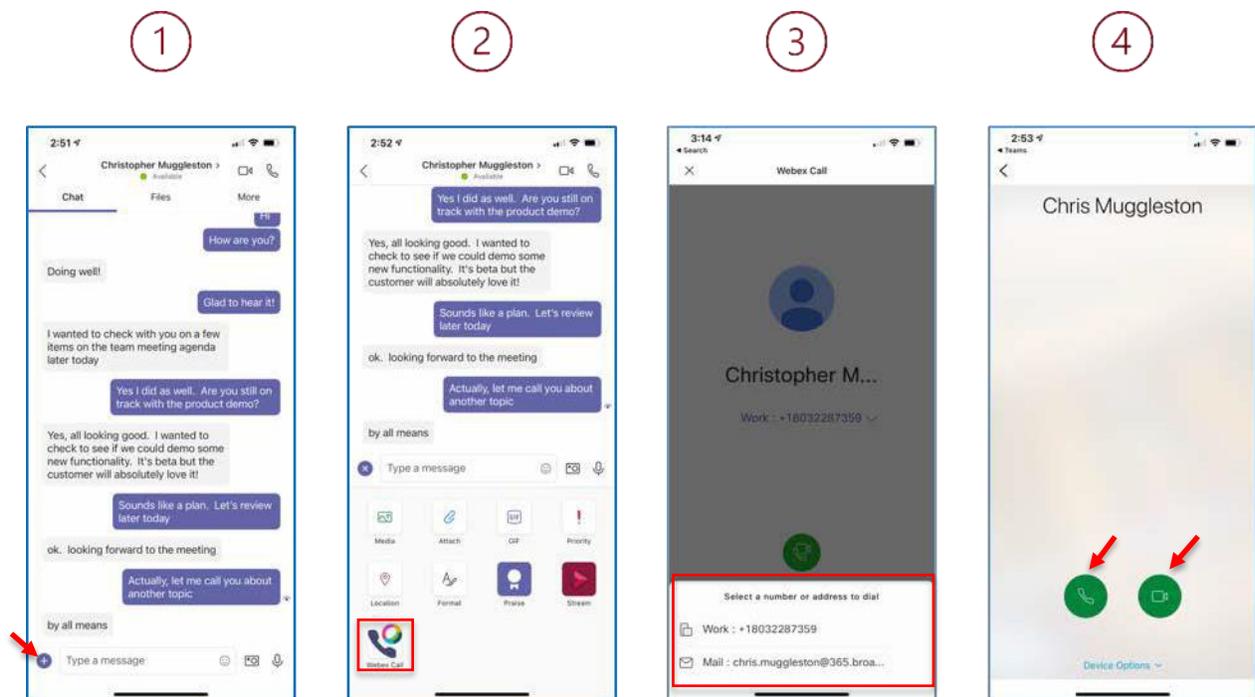
Note: Future call attempts will not require this step.

Make a Mobile Call in a Chat Window

Note: If the user has not already logged into the Webex client, they will be prompted to login using credentials provided to you by your administrator. If a call was attempted, it must be reattempted from within Microsoft Teams after login.

When chatting with someone one-to-one (1:1)

- 1) Click the “+” sign that brings up the chat menu. Note that at least one message must be shared with the person before initiating calls
- 2) Select “Webex Call” at the bottom of the window
- 3) After pressing “Webex Call”, the user may choose how to call the contact by pressing the default number displayed, which brings up alternative options to select, and then the “Call” button is pressed.
- 4) The Webex client will launch, allowing the user to select how to make the call, using video or audio only.



Summary of Feature Access by Client

The table below provides a summary of what client is used to access features.

Feature	Microsoft Teams	Webex
Presence	✓	
Chat	✓	
All Calling Features (PSTN, Call Transfer, Conference, hold)		✓
Voicemail		✓
Call History		✓
Teams Point to Point Calls (if enabled)	✓	
Teams Call History (if Teams Point to Point Calls enabled)	✓	