

The Comcast Business logo is in blue, with 'COMCAST' above 'BUSINESS'. A vertical line separates it from the 'MASERGY' logo, which is in a lighter blue. The background features a low-angle view of a modern glass skyscraper with a grid of windows, and a grey diagonal graphic in the top left corner.

COMCAST  
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# End User Guide

Masergy UCaaS with Webex

September 2022

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## Overview

Masergy UCaaS with Webex<sup>1</sup> provides a fully integrated collaboration experience, combining Masergy's Hosted UC calling platform with Webex's advanced collaboration and messaging capabilities, all within a single application, Webex.

Masergy UCaaS is a best-of-breed solution that includes cloud calling, virtual meetings, team collaboration, SIP trunking, and IP phones. When combined with Masergy Managed SD-WAN Secure connectivity, our UCaaS solution empowers your business with a network purpose-built for VoIP phone calls and video conferencing—ensuring consistency in every online collaboration anywhere in the world. Masergy integrated Webex applications with our software-defined network to enable pristine business communications backed by service level agreements. Combined with Masergy's secure and SLA-backed network, secure Hosted UC platform, and its award-winning operations centers, Masergy UCaaS with Webex brings the best of Masergy and Cisco together.

Webex is a communications and collaboration cloud-based service for calling, messaging, and meeting with anyone from any device. It includes HD video, Masergy voice, messaging, file sharing, screen sharing, and conferencing in a single easy-to-use application that can connect with the other tools you use to simplify life.

Whether on the go, at a desk, or together in a meeting room, Masergy UCaaS with Webex helps people solve business challenges, build better relationships, and speed up projects. It has all the team collaboration tools you need to keep work moving forward.

## Summary

Masergy UCaaS with Webex provides a single easy-to-use and secure application to call, message, and meet. The app allows individuals to:

- Stay connected anytime, anywhere, and on any device
- Chat 1:1 or in groups
- Share and receive files or content
- Whiteboard or draw with your team and share the interactive content
- Intuitively search for messages and content with search filters
- Share presence info or create customize with custom status options

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<sup>1</sup>The use of Webex is governed by the End User License Agreement may be found here:  
[https://www.cisco.com/c/dam/en\\_us/about/doing\\_business/legal/eula/cisco\\_end\\_user\\_license\\_agreement-eng.pdf](https://www.cisco.com/c/dam/en_us/about/doing_business/legal/eula/cisco_end_user_license_agreement-eng.pdf)

# System and Software Version Requirements

The following are the requirements for the Webex app:

- Windows PCs Recommended System Requirements
  - Windows 10 and later
  - Intel Dual-Core CPU 2.XX GHz or AMD processor (4 GB of RAM minimum recommended)
- Mac Recommended Minimum System Requirements
  - MacOS 13.7 and later on a [supported Mac](#)
  - M1 Chip or Intel CPU-based (4GB of RAM minimum recommended)
- iPhone and iPad—iOS 13.7 and later
- Android Smartphones—Oreo 8.0 and later (3GB of RAM required).
- Web minimum supported the last two major releases of Google Chrome, Mozilla Firefox, Apple Safari, and Microsoft Edge on computers running Windows, Mac, or Linux.

## Getting Started

*All screenshots depicted in this document are taken from an Apple MacOS desktop using an early release of the Webex application except where explicitly noted. As such, some screenshots may have slightly different product logos and branding but your overall setup experience will be similar.*

## Download the App

You can get the Webex app for your computer or mobile device, install it on multiple devices, and switch between them easily. This still may not be necessary if your company manages software for your devices.

- Webex Desktop App (<https://www.webex.com/downloads.html>)
  - Microsoft Windows
  - MacOS
- Mobile Client
  - 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.

## Sign In for the First Time

Signing into Webex is fast and easy. Some minor differences are depending on the method your company has chosen to authenticate (Single Sign-On or SSO, Webex authentication, Masergy's UCaaS authentication) and whether you're joining from a computer or mobile device.

### Windows and Mac

#### Single Sign-On (SSO)

Note all screenshots depicted in this section are using Google SSO Identity Service Provider (IdP). Other IdP experiences will be similar.

If your organization is configured for SSO, upon starting Webex, the user will be directed to the organization's Identity Provider (IdP) page to complete the login process.

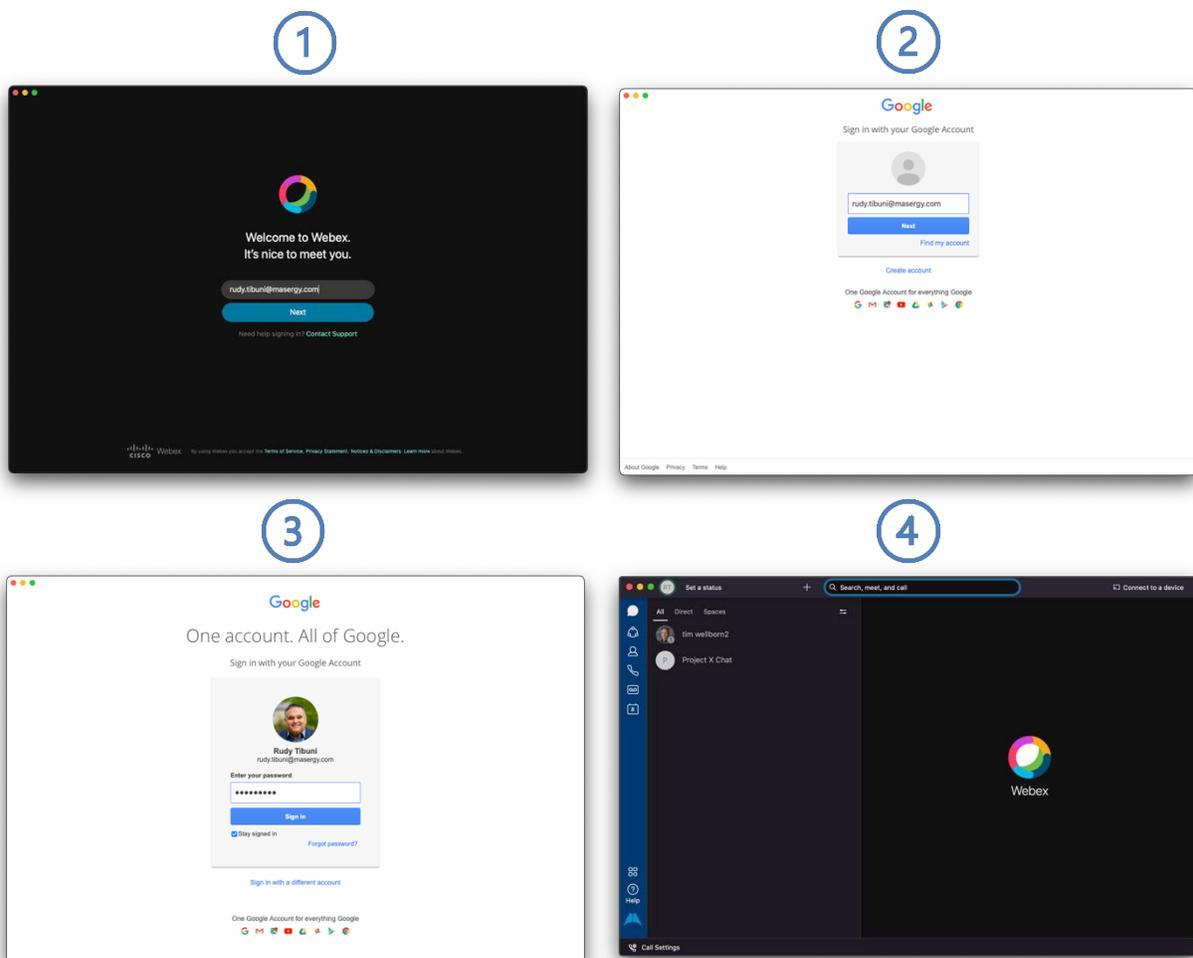


Figure 1 Single-Sign On

## Webex Authentication

If your organization is configured for Webex authentication, you will receive a Welcome to Webex email. Click on the Activate button to activate your account. Once your account is activated, you will be able to sign in with your email address and create your password for sign-in.

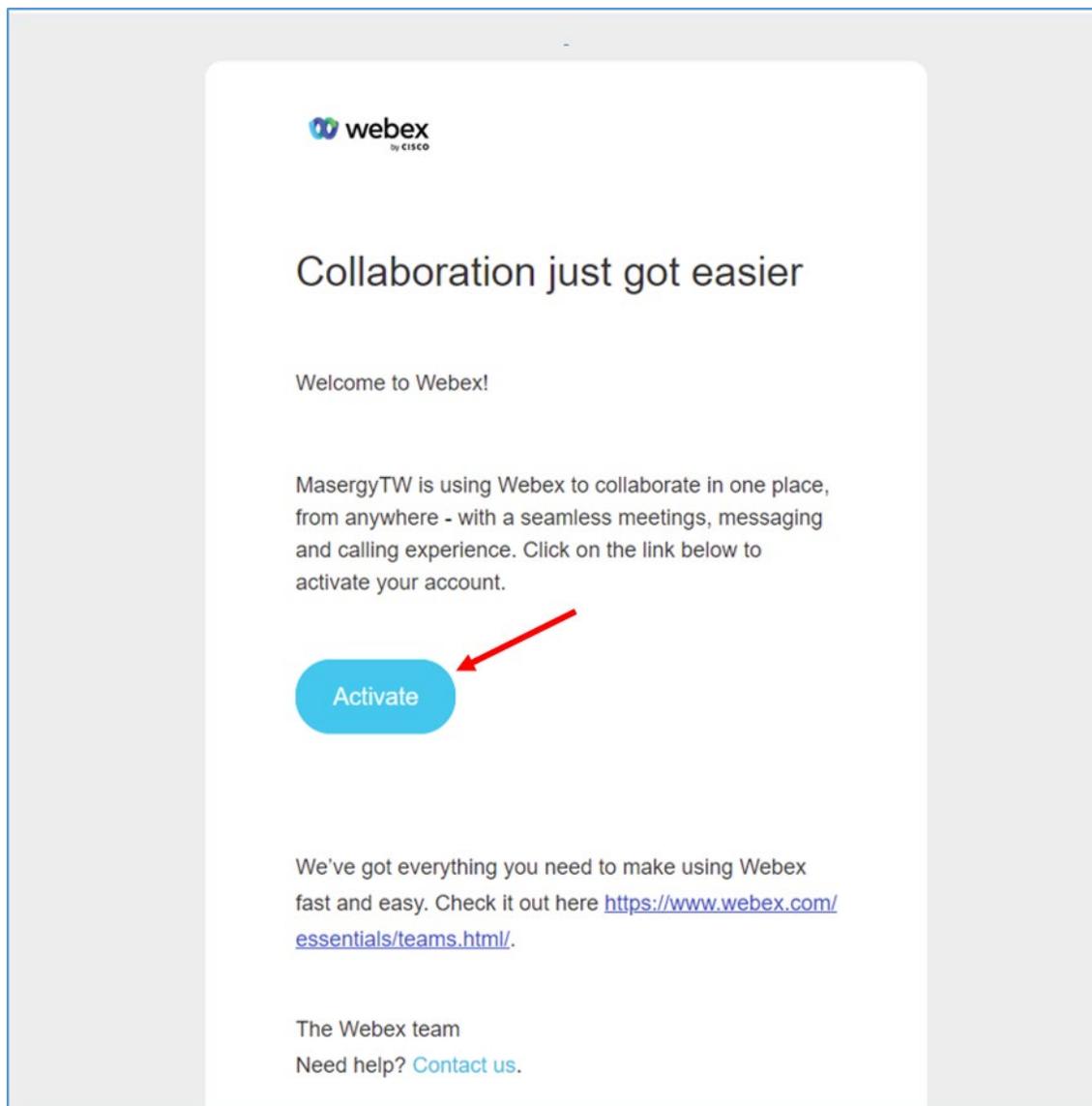


Figure 2 Webex Authentication – Welcome Email

## Mobile Devices (iPhone, iPad, and Android)

If you are signing in from a mobile device, the SSO and Masergy UCaaS authentication will be similar to desktop, so the directions in the previous section apply. However, if your organization is using Webex authentication, upon signing in the first time you receive an email link to verify your email address, and then you are prompted to create your password and sign in.

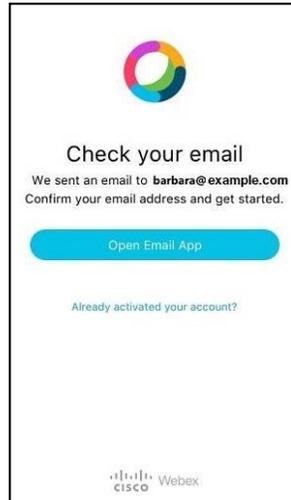


Figure 3 Mobile Devices

## The Webex App

The figures below highlight the main features of the Webex interface and how we talk about it.

## Webex for Windows and Mac

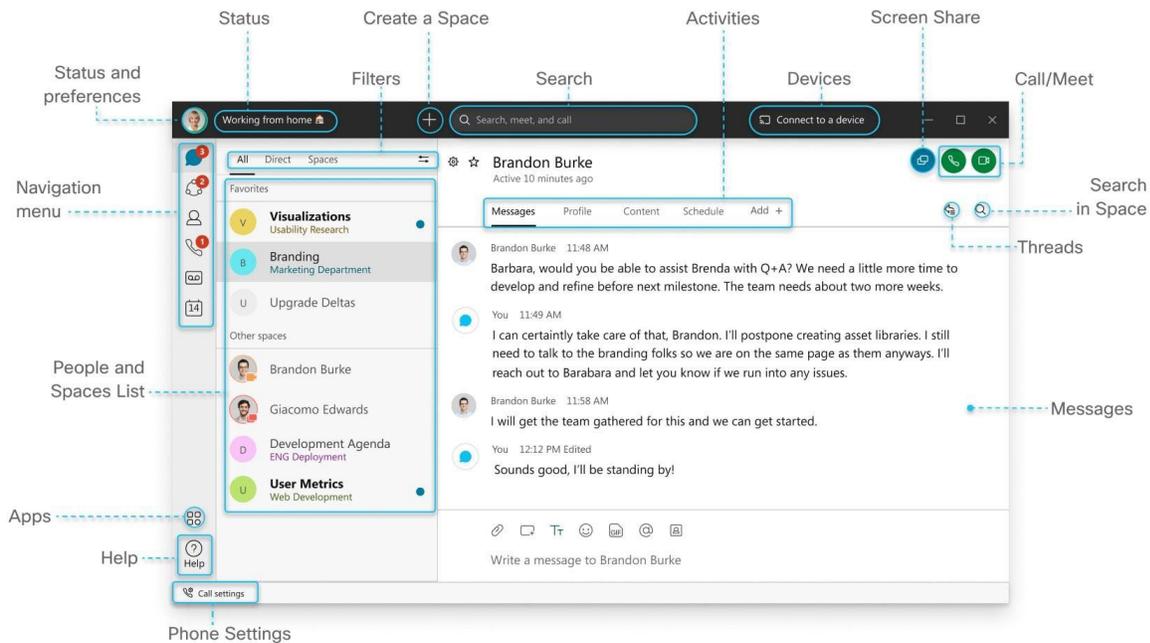


Figure 4 Webex for Windows and Mac Legend

## Webex for iPhone

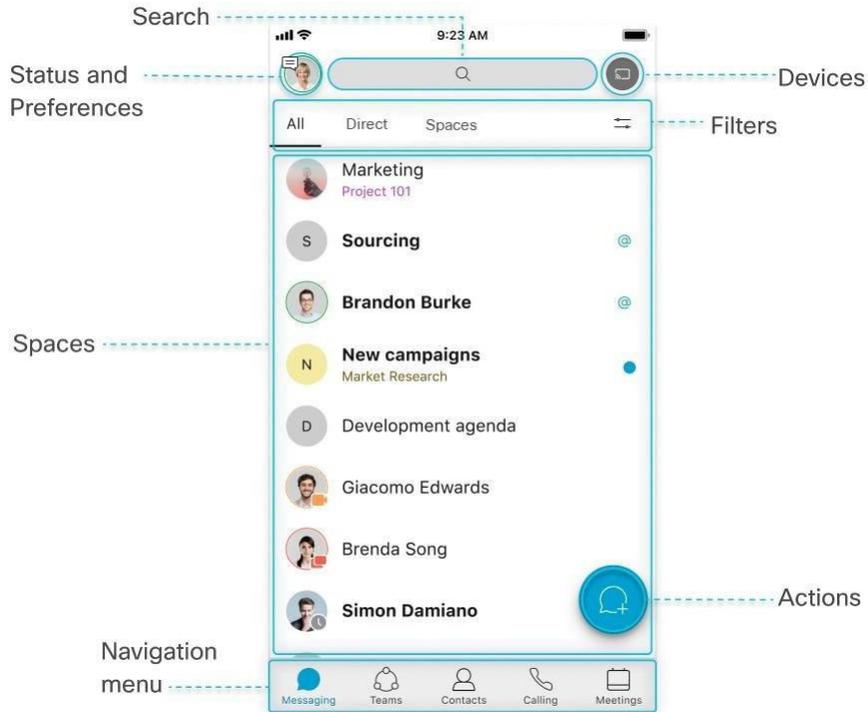


Figure 5 Webex for iPhone Legend

## Webex for Android

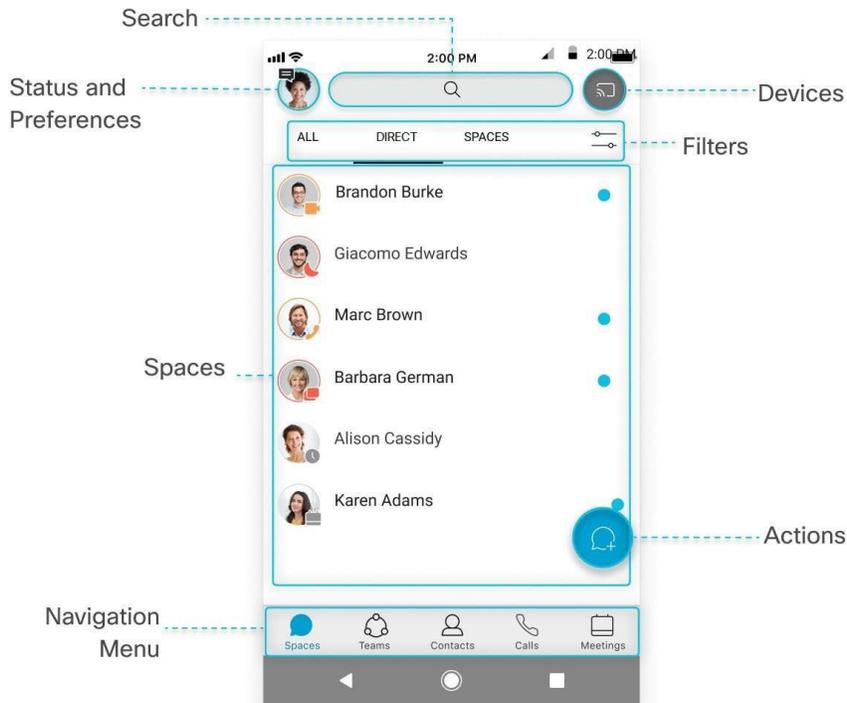


Figure 6 Webex for Android Legend

## Help

On Windows and Mac, you will see **Help**  at the bottom of your spaces list. The link brings you to our [Contact Support](#) page on our site.

## Spaces

Your group work takes place in spaces, either in groups or in direct messages with another person. They display prominently so you can get to them whenever you need to. Your most recently active spaces are at the top. If anyone has added you to a new team or space, you will see it here too. When someone has posted a new message in the space, you will see the bolded space name.

You will sometimes see icons letting you know what is happening in your spaces. These [notifications](#) give you information about new messages you have received and spaces you have been added to.

## Navigation Menu

Switch easily among your message, team, call, and meeting views. Messages appear by default, but your teams, calls, and meetings are just a click away. When you have unread messages in your spaces or teams, you will see counters next to **Messaging**  and **Teams** .

## Profile and Preferences

In the app header, click your profile to update your picture or name, access your settings and preferences, and set your availability. If you have some important work to finish or are on a call, let people know that you do not want to be disturbed: whether that is for a few minutes or an entire day is up to you.

## Status

In the app header click “Set a status”, select a status from the list or create and share any status you want, so your colleagues know what you are up to.

## Presence of Contacts

In the “People and Spaces List”, you can quickly see the status of your colleagues, such as whether they are active and available, inactive, in a meeting, or on a call, so that you know how best to contact them.

## Search

In the app header, just click  Search, meet, and call to search through the history of your conversations to find people you are talking to, spaces you are in, messages you received, and files you need.

## Filters

Click  to see the available filters. Then, select a filter to show just the messages or spaces you want to see.

Tap  on your mobile device to see the available filters. Then, select a filter to show just the messages or spaces you want to see.

## Start a Conversation, Make a Call, or Add a Contact

In the app header, , and select Send a direct message to create a direct message space between you and just one other person, or select **Create** a Space to start a group conversation. You can also select Make a call, or select “Add a Contact”. Tap , on your mobile device and select **Send** a direct message to create a direct message space between you and just one other person, or select **Create** a Space to start a group conversation.

## Devices

In the app header on Windows and Mac, you can connect automatically with Webex devices from the **Connect to a Device** menu. When connected, you can share your screen, start a call, or open a space (on Webex Board). You can also connect to your desk phone from the menu to make calls and join meetings. If you have, a lot of devices close by, you can set certain devices to not automatically connect.

## Activities

Whenever you are in a space, click the activity menu tabs to get access to all the different activities you can do:

**Messages** — Messages are where you chat with colleagues. We keep these messages secure so you can feel confident sharing your work ideas in Webex.

**People** — See who is in the space, or if you are a moderator you can add people to the space.

### Content:

 Files — Find your shared files, photos, and whiteboard content.

 Whiteboards — Create and share content on whiteboards.

 Links — See all links shared in the space.

**Schedule** — Create a meeting from the space or get a list of meetings already scheduled for the space.

## Call/Meet

 Audio — Make an audio call to a person.

 Video — Make a video call to a person.

 Meet — Start a meeting with everyone in the space.

## My threads

 — See threads that you are a part of in the space.

## Search in space

Click  to search through the conversation history of the space you are in, to find messages you received and files you need.

- 💡 Although we did not show these options on mobile, just click a space name from the list and click the activity menu to see these same choices.

## Get Started with Webex

You can customize your settings and preferences to get the best experience. In the sections that follow, to access “Status and Preferences”, simply click your initials on the top left corner as shown in Figure 4, Figure 5, and Figure 6.

## Customize Your Audio and Video preferences

When you join a meeting or make a call from your desktop or mobile device, the app automatically detects the audio and video devices you have connected.

You can customize your video settings:

- Choose what camera to use
- See yourself like you’re looking in the mirror (Mirror my video)
- Customize your background using a pre-set or custom virtual background

You can also personalize your audio settings:

- Choose headset, speaker, or microphone
- Reduce disruptions with background noise removal and speech enhancement

## Message<sup>2</sup>

In the Webex app, all your work takes place within spaces and teams. Here you can send messages, make calls, have video meetings, and share files and whiteboards. All this begins by pressing the “+” sign (Figure 4 Webex for Windows and Mac Legend) to start a conversation, make a call, create a contact, or schedule a meeting.

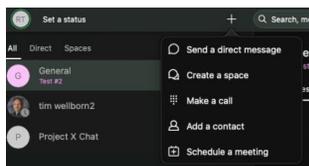


Figure 7 Start a conversation, make a call, create a contact, or schedule a meeting.

<sup>2</sup> Available if service is enabled for your account by your administrator

## **Direct Messages**

You can send messages directly to one person. The conversation that you started remains between the two of you.

## **Spaces**

Spaces work well for a group of people working on a specific topic or project. You can join a space when someone who is already in the space adds you to it. Spaces by default are unmoderated, which means anyone can add or remove people, change the name of the space and the picture associated with the space. If you need more control, you can make yourself a moderator of the space by clicking the gear icon next to the space name and selecting “Moderate Space”. Space moderators can add or remove people, edit the space settings, and assign or remove people as moderators.

## **Teams**

If your space outgrows its specific topic or project, you can create a team and move a space into a team. Teams help keep things organized by putting multiple spaces under a common theme. Only a moderator may add you to a team and every team has at least one team space, General where you will be added to by default.

Start a conversation with someone by pressing the “+” sign (Figure 4 Webex for Windows and Mac Legend) and selecting “Send a direct message”. It creates a conversation between you and the person you invite into the conversation, including those outside your organization as long as you have their email address.

You can also “create a space”, which is perfect for conversations on a specific subject or project that involve one or more people.

## **Meetings<sup>3</sup>**

With Webex, you can meet whenever you need to whether that is right away or later. There are two ways to start a meeting, either from the calendar or from your space. Regardless of which one you choose; you connect with video or just audio and record your meetings.

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<sup>3</sup> Joining meetings does not require enabling of your account by your administrator

## Customize Your Audio and Video Preferences

When you join a meeting from your computer, the app automatically detects the audio and video devices you have connected to your computer, such as a headset. You can change your settings right before you start or join a meeting, like if you want your video on or you just want to dial into a meeting with audio-only.

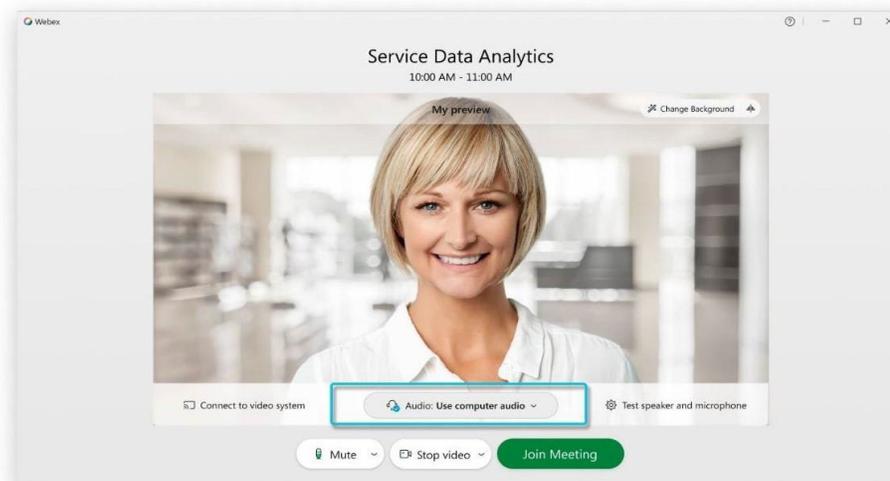


Figure 8 Change your meeting audio and video preferences

## Schedule a Meeting<sup>4</sup>

### From a Calendar

From your meetings calendar, you can start a meeting right away in your Personal Room<sup>4</sup>, which gives you an always-available virtual conference room assigned just to you. Because it is your room, the link never changes.

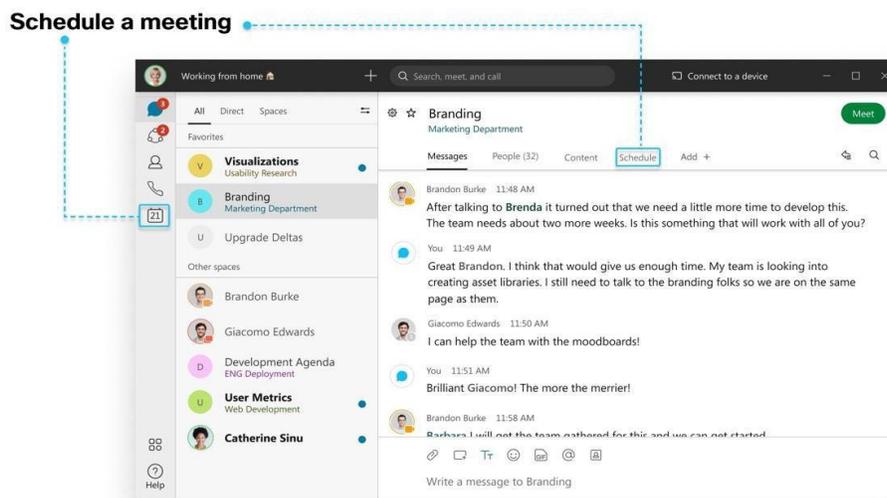


Figure 9 Schedule a meeting

<sup>4</sup> Available if service is enabled for your account by your administrator

You can also view details about your upcoming meetings in your meetings list, like what the meeting is about, when it is happening, who is invited, and who scheduled it. You can join it with the click of a button.

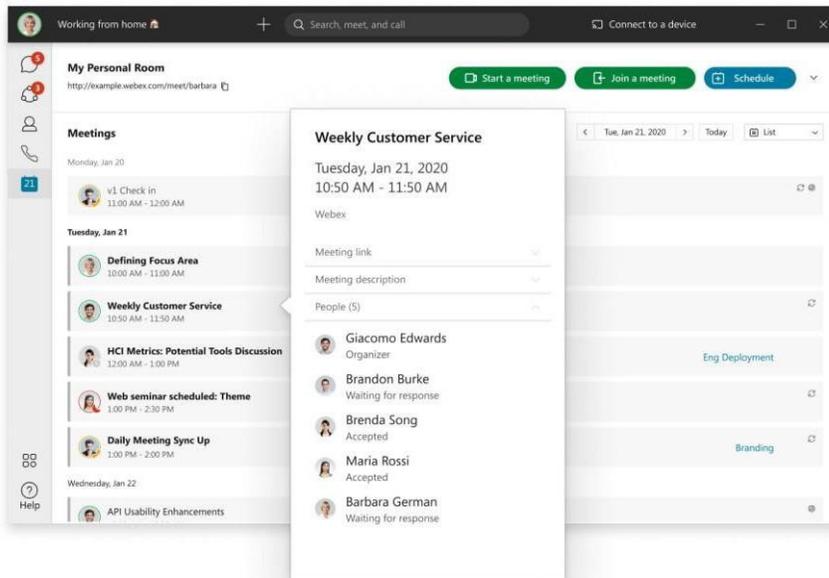


Figure 10 Meetings List

## From a Space

Spaces allow you to have one-click “Space Meeting”, by pressing **Meet** button. Space meetings are ad-hoc meetings (not scheduled), where everyone in the space will be invited automatically to join the meeting. These types of meetings are useful because it is the same space you are already working in; therefore, you get easy access to your messages, files, and whiteboards and can work with them while you are meeting.

## Customize Your Audio and Video Calling Preferences

When you make or receive a call from your desktop or mobile device, the app automatically detects the audio and video devices you have connected. You can change your settings by accessing “Status and Preferences” for your device as listed, then “Preferences.”

You can customize your video settings:

- Choose what camera to use
- See yourself like you’re looking in the mirror (Mirror my video)
- Customize your background using a pre-set or custom virtual background

You can also personalize your audio settings:

- Choose headset, speaker, or microphone
- Reduce disruptions with background noise removal and speech enhancement

## Outgoing Call

You can call anyone quickly and easily with audio or video by pressing the **Audio**  or **Video**  icon or by selecting his or her phone number.

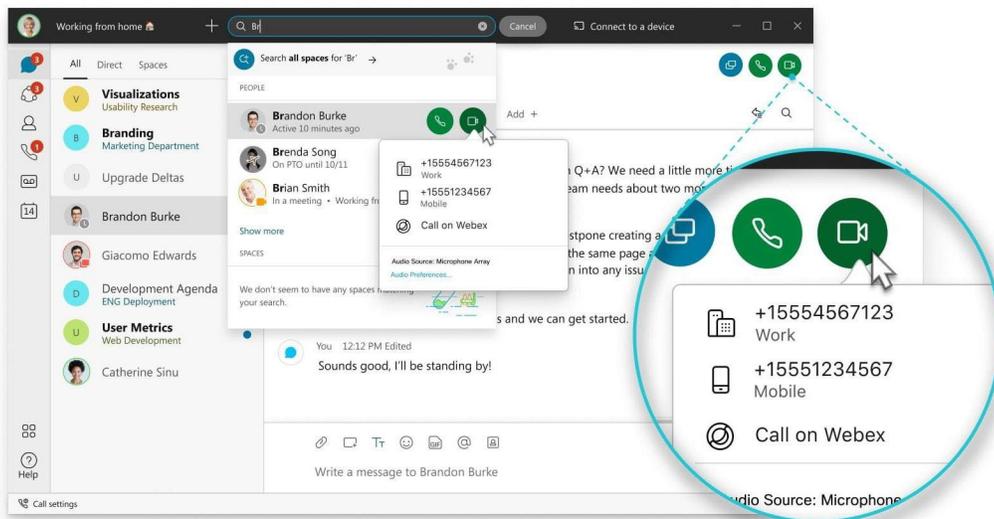


Figure 11 Outgoing Call

## Personalize Webex

### Add a profile picture

Adding a profile picture allows co-workers and business partners to recognize you while online.

### Desktop App

On the desktop app, once you have accessed “Status and Preferences”, select “Edit Profile” from the menu.

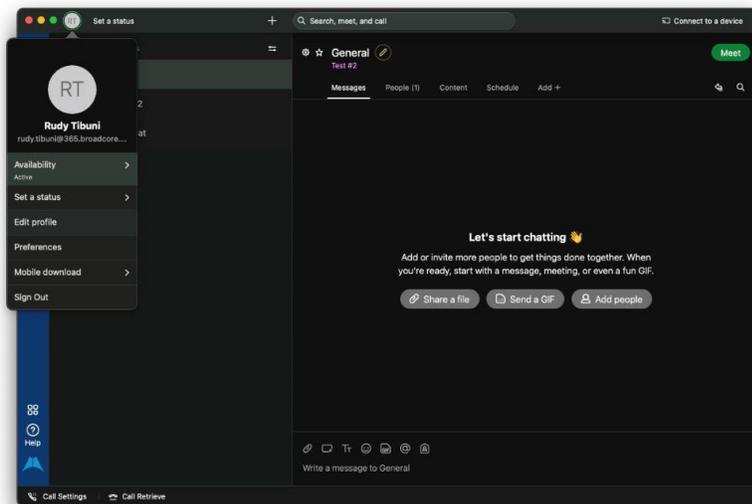


Figure 12 Edit Profile

Next, simply press “Change Picture” and follow directions. Once modified, your profile picture will be updated on all your devices.

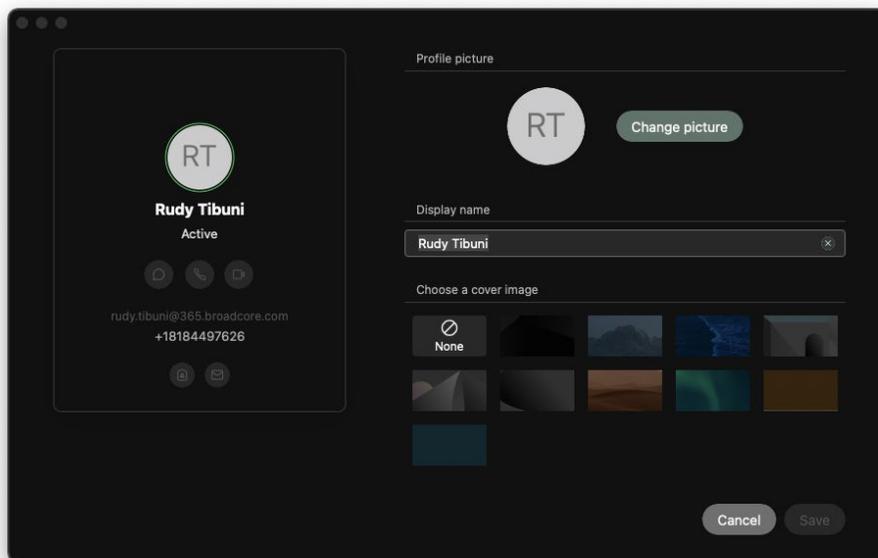


Figure 13 Change Picture on Desktop App

### Mobile App

Similarly, once you’ve entered “Status and Preferences”, to change your picture, you simply press your initials to open up a new screen, where you can press “edit” in your picture and follow the screens to change it.

Note that on a mobile device, you will be prompted to give permission for Webex to access your photos.

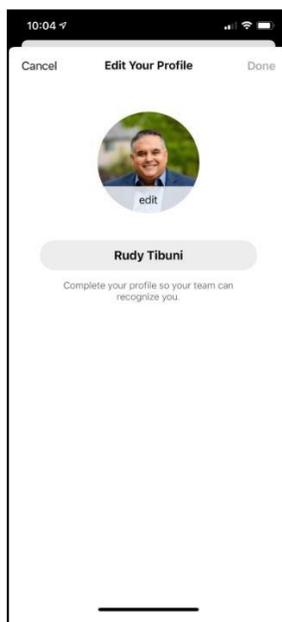


Figure 14 Edit Picture on Mobile App

## Customize the Colors of Your App

You can add more color to your desktop app by choosing a theme. To do so, access “Status and Preferences” and then select “Preferences” to bring up the “Preferences” window. From here, select the “Appearance” tab and select the theme you would like to use. For a personal touch, you can also select a cover image for your profile, contact card, and spaces.

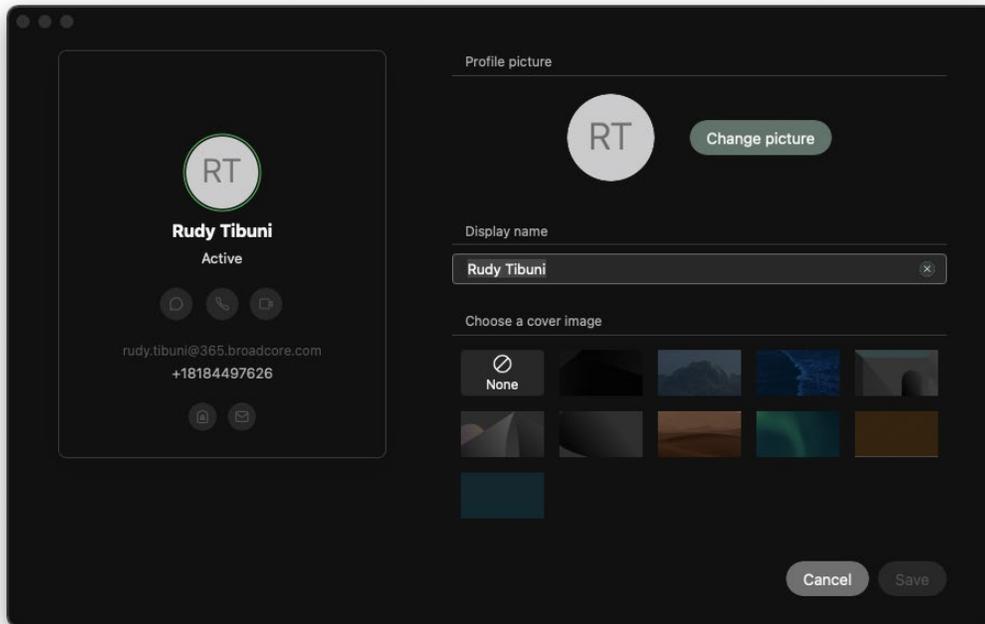


Figure 15 Change Theme

## Notifications

You can set your notifications to determine how and when you are alerted about new messages in Webex. By default, you are alerted to any new content in any spaces you are a part of. By managing how you are notified about what is going on in Webex, you can avoid getting overwhelmed by too much information.

The global setting is accessed by clicking your picture or initials at the top left of the Webex app and selecting “Preferences”. For example, you may want to only be notified about new content sent directly to you or to the spaces that are most important to you. As such, we recommend:

- Changing notifications for all spaces to “@Mentions” only so you’ll see fewer visual notifications, helping you focus on your most important spaces

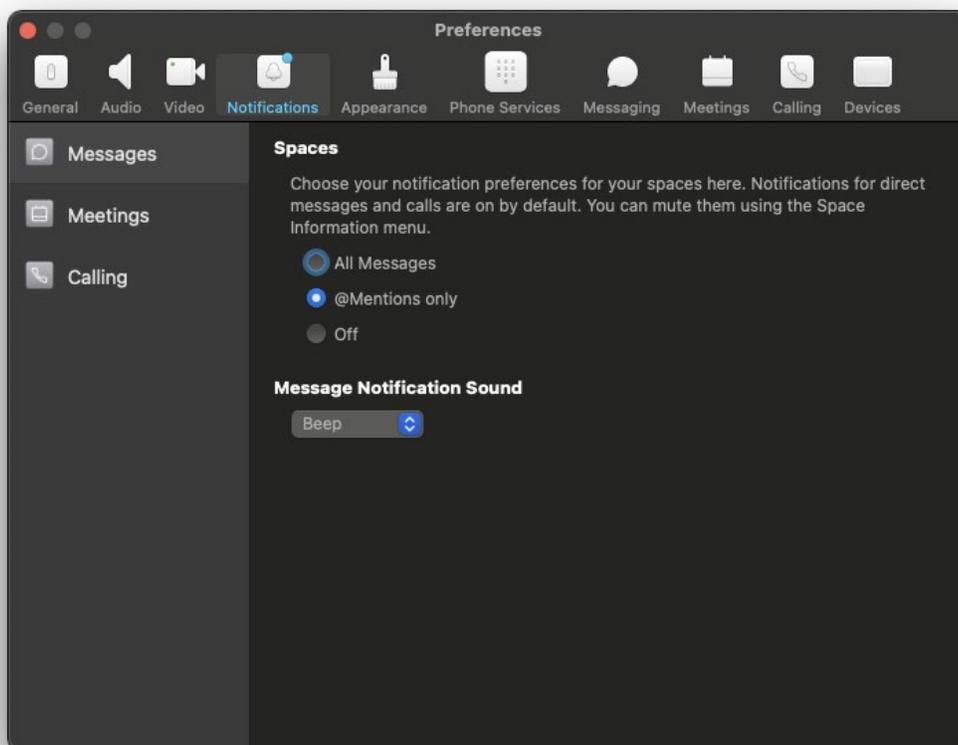


Figure 16 Global Notification Settings

You may also customize notifications for individual spaces. To customize the notification for a space, simply click the space from the main app window, select the gearbox next to the space name and select “Notifications” from the menu.

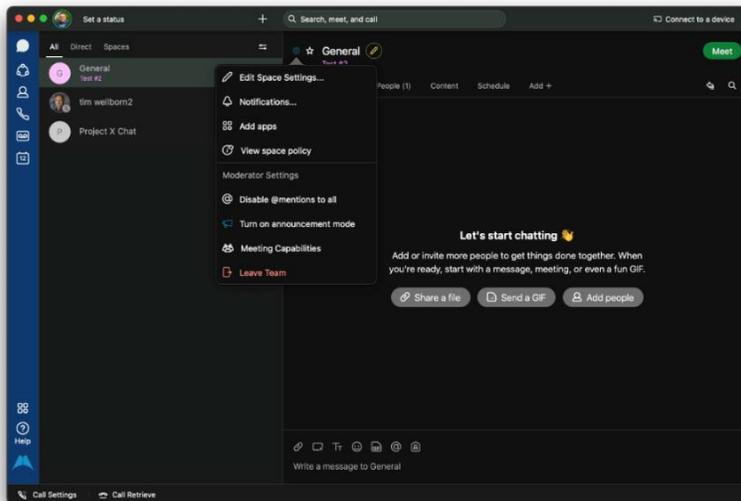


Figure 17 Customize Individual Spaces

By default, all spaces are set to the Global setting, however, you can customize them to “All Messages”, “@Mentions Only”, “Off”, or “Off and hide space” to “All Messages”.

For example, individual spaces you deem critical (those where you cannot afford to miss any messages), we recommend:

- Changing the notifications to “All Messages”

Similar customization can also be done for Meetings and Calling setting as depicted in Figure 16.

- Meetings – you can choose whether to be notified of upcoming meetings and in-meeting notification sounds and participant action sounds.

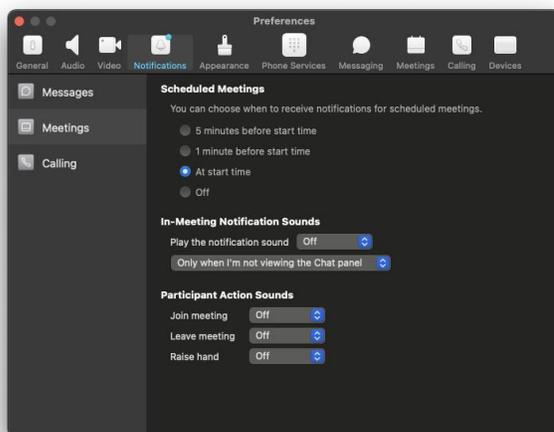


Figure 18 Meeting Notification Settings

- Calling – you can choose whether to receive notifications when you receive a call from another person and the sound played when notified.

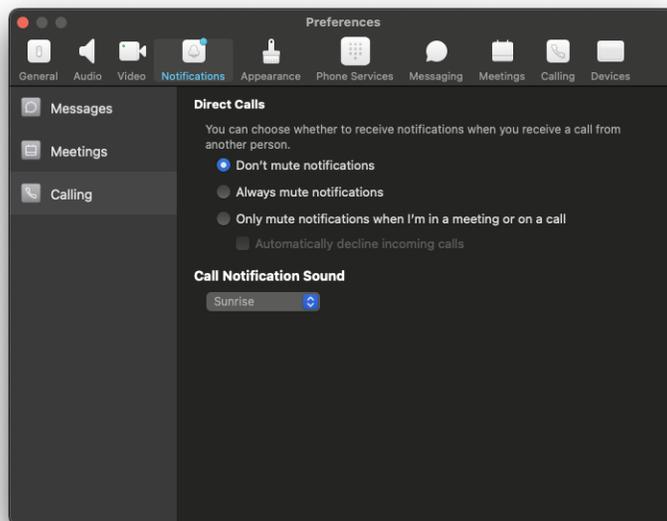


Figure 19 Calling Notification Settings

## Call Settings

Users can customize how their app behaves for incoming calls by clicking into “Call Settings”.

## Call Forward

When you select “Call Settings”, you have the option to specify whether Call Forward is enabled. For Call Forward, the default is “Do Not Forward Calls”, however, you can modify it to forward directly to voicemail.

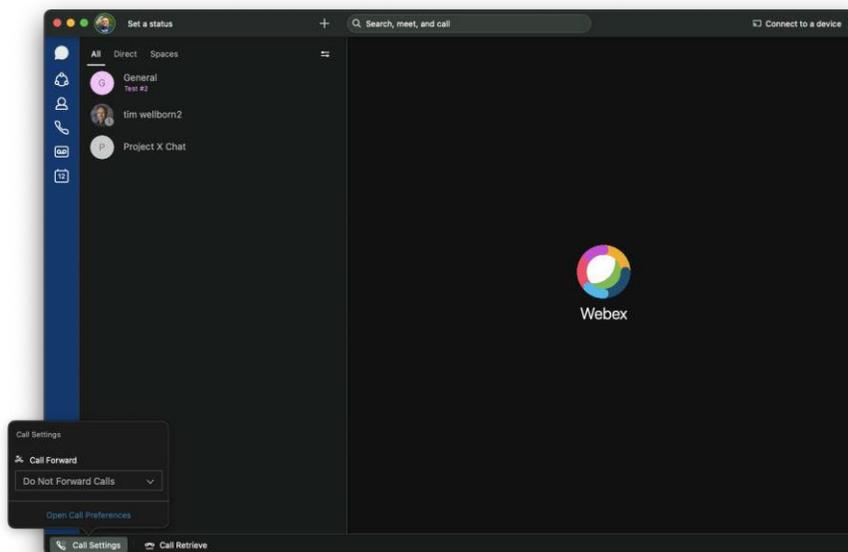


Figure 20 Call Forward

## Call Preferences

When you select “Call Settings”, you have the option to open “Call Preferences”. Selecting “Call Preferences” will result in the Preferences window being displayed. From here, you have three (3) tabs to further refine your calling settings.

### General Tab

The general tab allows you to specify whether you want to answer calls with video.

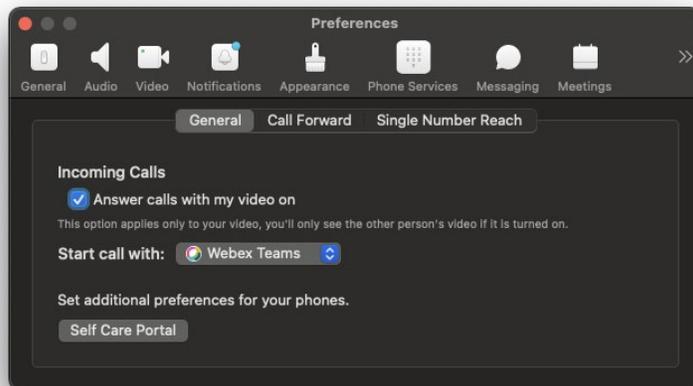


Figure 21 Preferences – General Tab

### Call Forward Tab

The Call Forward Tab allows you to add additional numbers that a user could forward phone calls to.

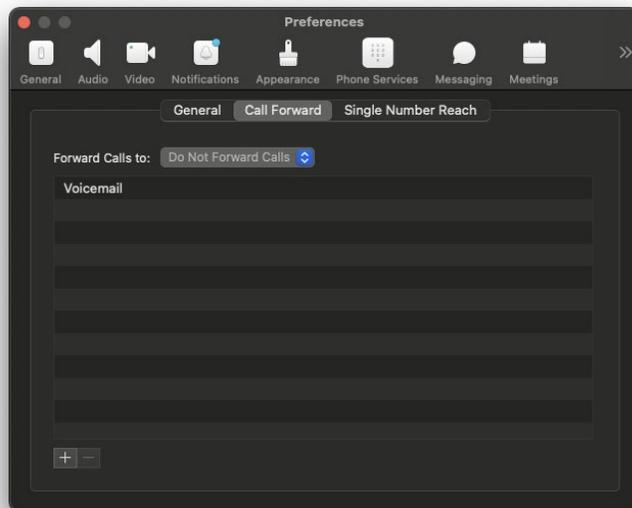


Figure 22 Preferences – Call Forward Tab

## Single Number Reach Tab

The single number reach tab allows a user to add a number that may be an extension of their business phone number.

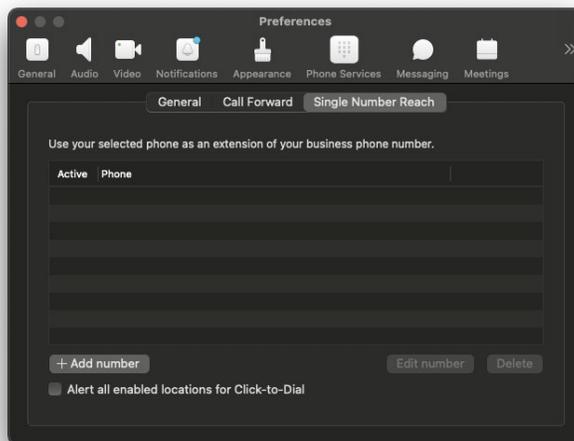


Figure 23 Preferences – Single Number Reach Tab

## Other Calling Capabilities

When you are on a phone call, you have access to common tasks such as:

- Put a call on hold – hold a call to tackle a task and resume it when your task is complete
- Transfer a call – transfer an existing call to someone else
- Park a call – park a call, placing it on hold so that another person on a different phone may pick up the call.
- Forward a call – forward calls to another number when you are away from your desk
- Add a person – add a person to your call to create a 3-way conference
- Keypad – if you need to type in digits

## 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”.

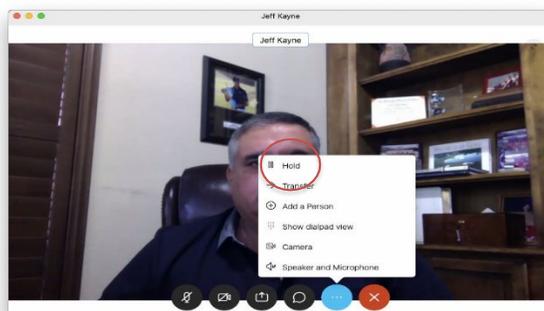


Figure 24 Call Hold

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

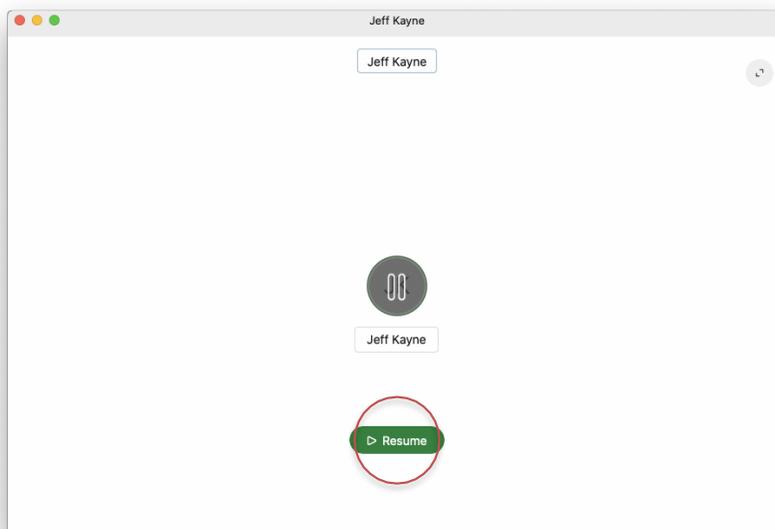


Figure 25 Resume Held Call

## 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”.

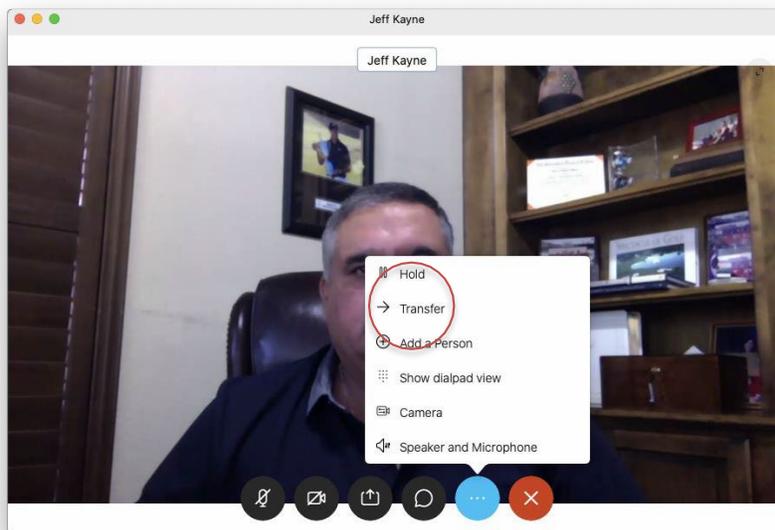


Figure 26 Call Transfer

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

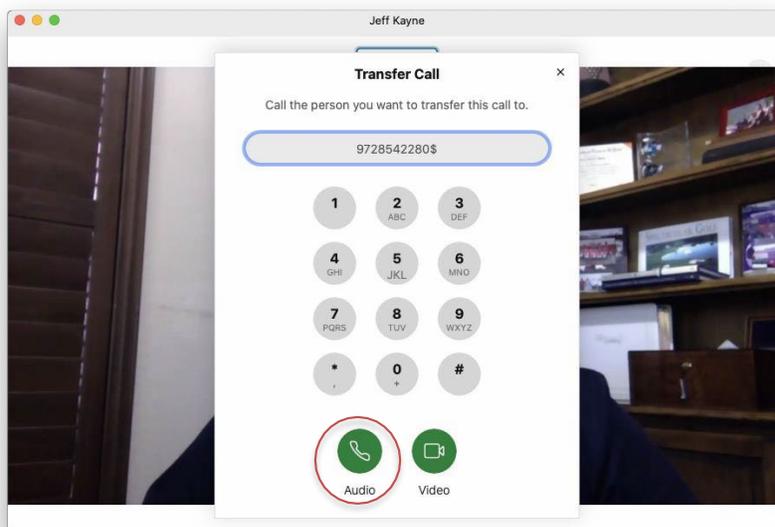


Figure 27 Transfer a Call – PSTN

If you are dialing another user in your directory or 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.

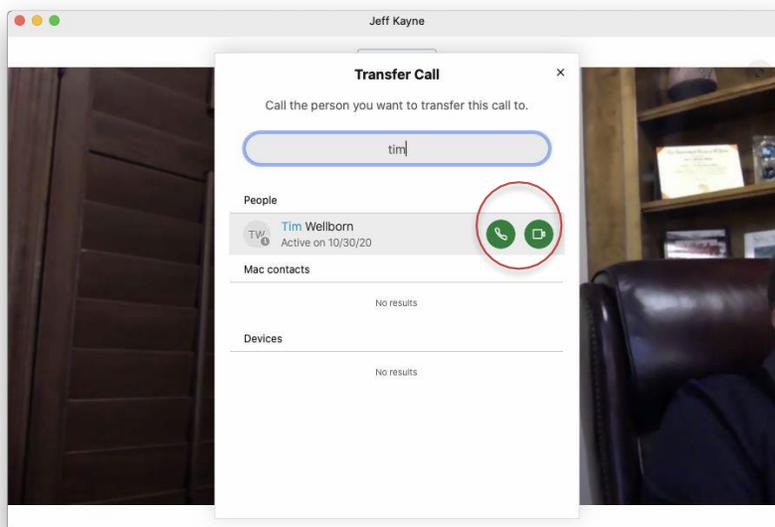


Figure 28 Transfer Call – User

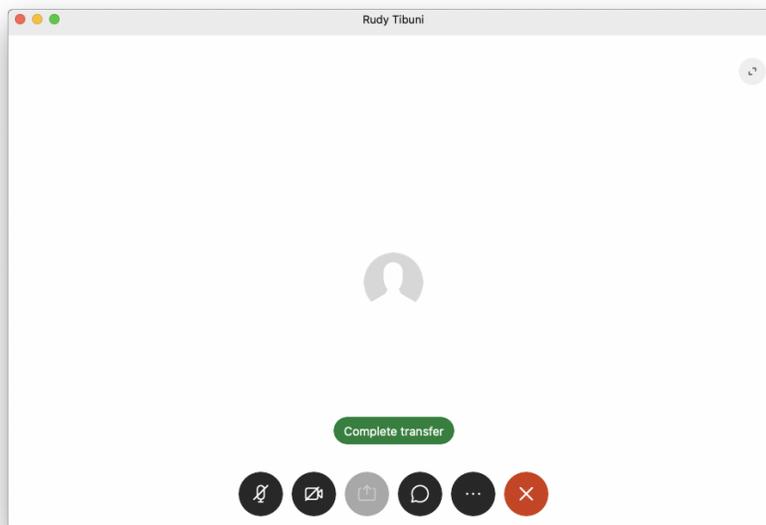
You will have the choice between performing a “*Blind*” and “*Consulted*” transfer.

- **Blind Transfer** – allows a user to transfer an active call to a specific destination without consulting with the destination party. In other words, you send a call directly to that person without letting them know who it is. With this method, the caller ID of the call you are transferring, will translate to the destination phone so that they know who is coming their way.
- **Consulted Transfer** – enables a user to consult with the destination party, before transferring the caller. In other words, you let the destination party know who is calling and give them the option to take the call or not.

When conducting a Consulted Transfer, your caller ID translates to the destination party. Even after you transfer the call, your name and number remain on the destination party’s screen. This is why it is important to announce the call, prior to completing the consulted transfer. If you do not wish to introduce the call first, utilize Blind Transfer instead.

If the party you called does not want the call, you can press **CANCEL** to speak to the caller. You can take a message or transfer them directly to voicemail.

Once the called person has answered or the destination device begins to ring, the transfer may be completed by selecting the “Complete Transfer” button.



*Figure 29 Complete Transfer*

For additional information on performing a blind and consulted transfer, please review the UCaaS with Webex tutorials on the Comcast Business | Masergy [Software and Downloads](#) page.

## Conference Calling

To add another user 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”.

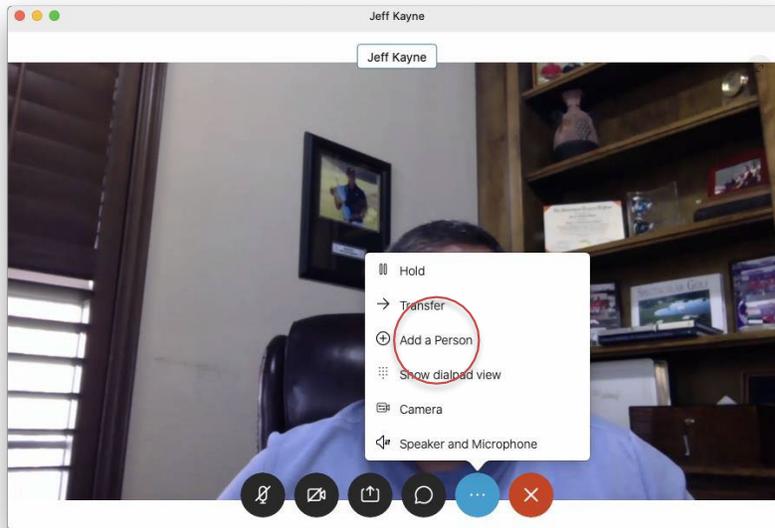


Figure 30 Add a Person

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

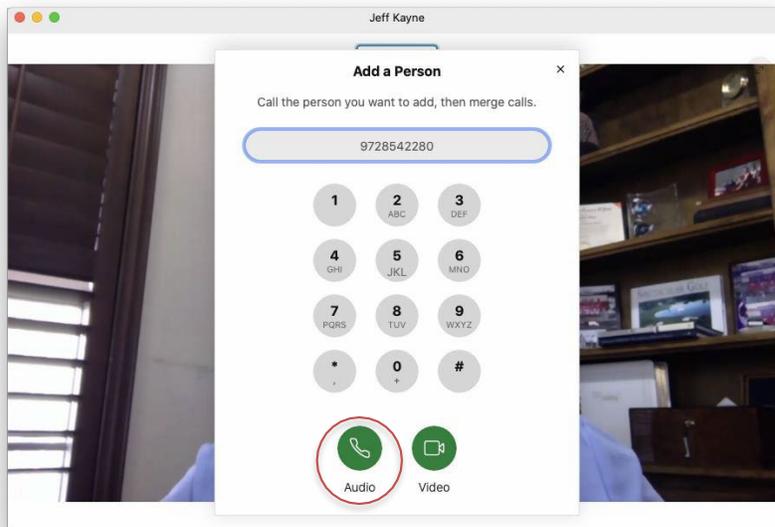


Figure 31 Add a Person – PSTN or User

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

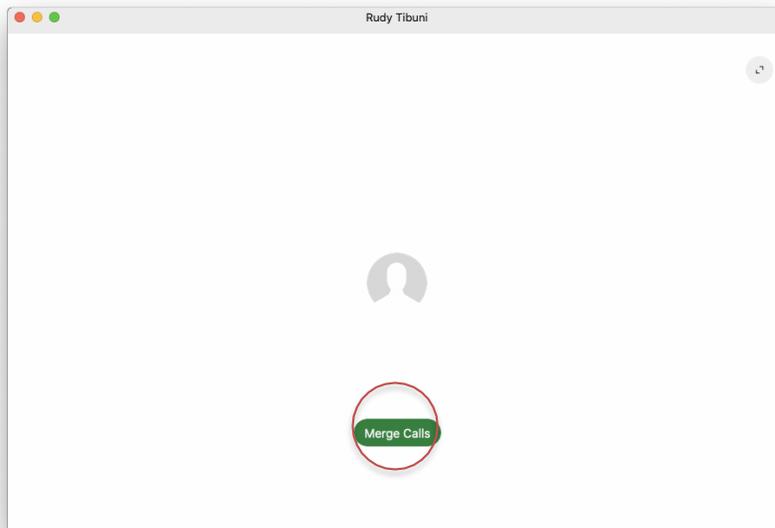


Figure 32 Merge Calls to Complete Transfer

For additional information on performing a conference call, please review the UCaaS with Webex tutorials on the Comcast Business | Masergy [Software and Downloads](#) page.

## Call Park

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”.

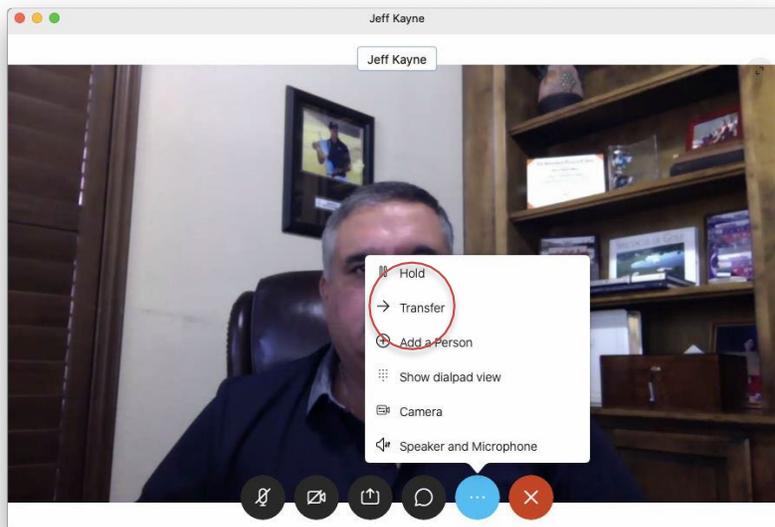


Figure 33 Call Park

In the transfer popup window, simply enter the Call Park feature access code, 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.

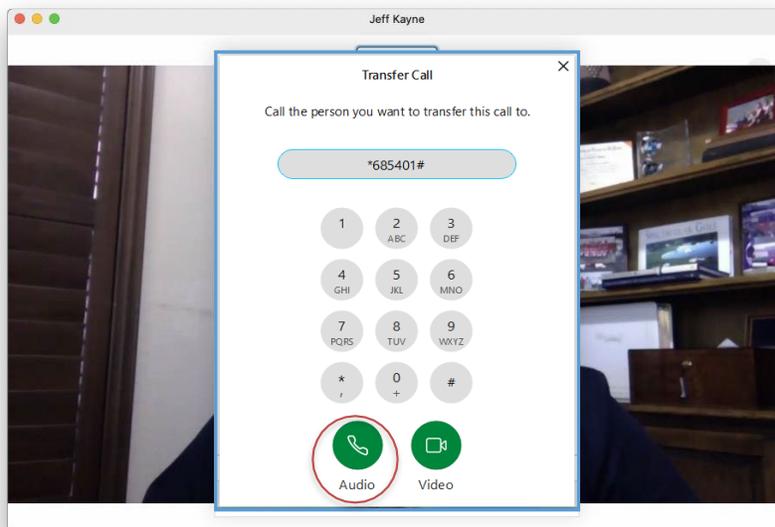


Figure 34 Enter Call Park Access Code

To retrieve the call, press the “Call Retrieve” button on the bottom left of the app enter the appropriate retrieval code and 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.

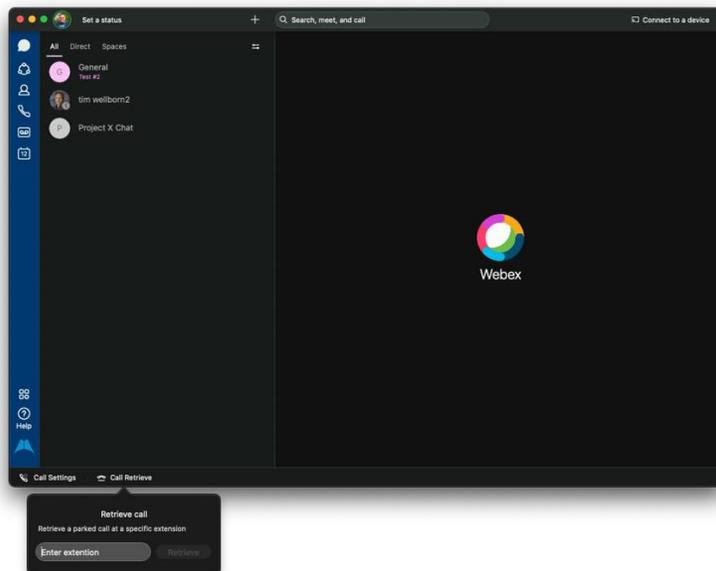


Figure 35 Call Retrieve

## Call History

The phone icon on the left-hand panel of the Webex client accesses the Call History.

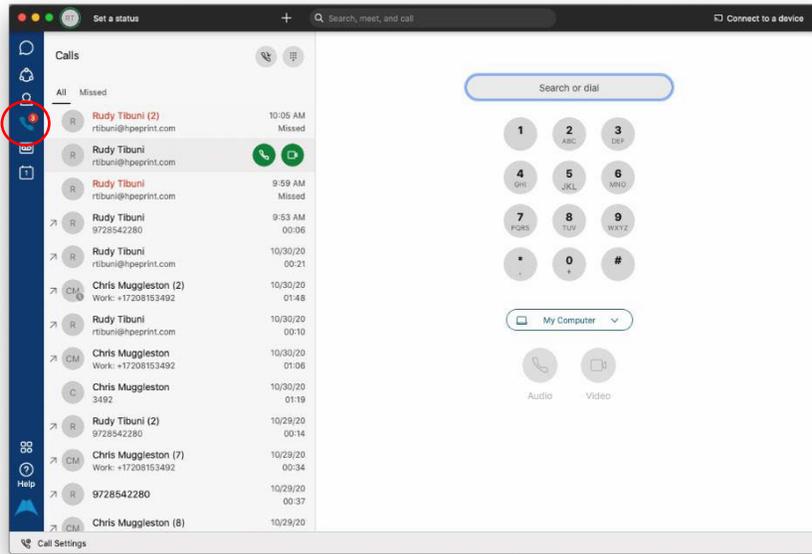


Figure 36 Call History

## Voicemail

Voicemail is accessed through the Webex client by pressing the “Voicemail” icon in the “Navigation Menu” as shown in Figure 4.

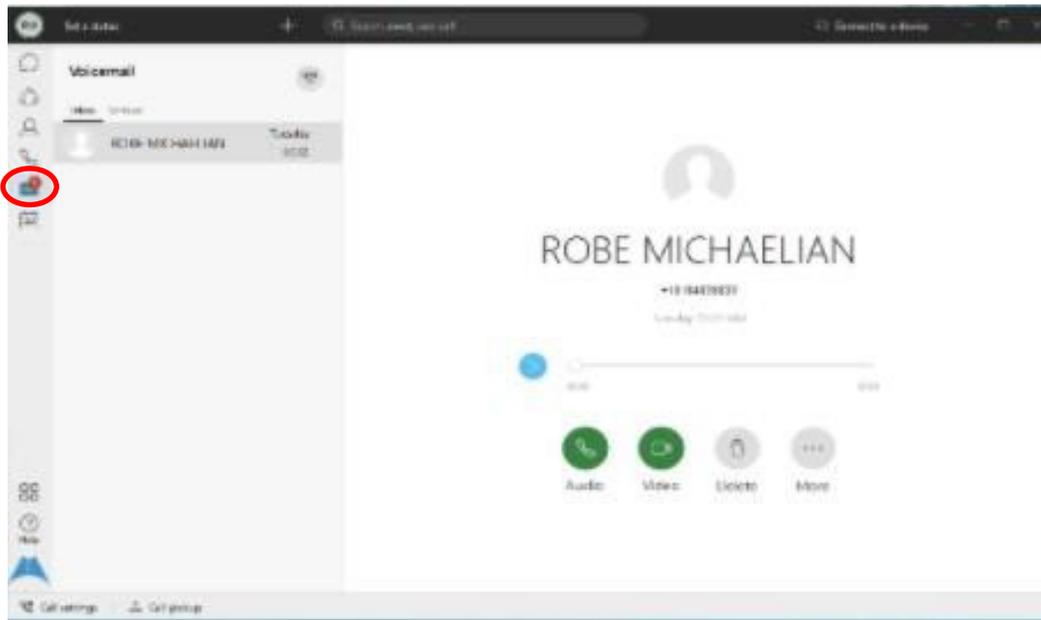


Figure 37 Voicemail

## Call Pickup / Busy Lamp Field Notification

The Call Pickup Notification or Busy Lamp Field (BLF) service is available for the Webex desktop client and presents itself as a pop out. The busy lamp field is quite helpful for managers or attendants who must answer and/or screen employee calls.



Figure 38 Busy Lamp Field Pop Out – Internal Call

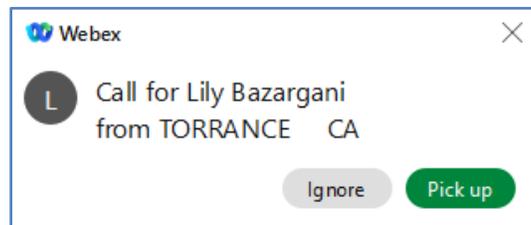


Figure 38 Busy Lamp Field Pop Out – External Call

When the BLF pop out appears, you have the choice to ignore or pick up the inbound call. If the user takes no action, the BLF pop out will disappear on its own.

Masergy or your administrator usually sets up the BLF monitored extensions.

## Call Pickup / Busy Lamp Field Notification – Disable

To disable the Call Pickup Notification / Busy Lamp Field pop out from the Webex Desktop client, select the Avatar, go to Settings → Notifications, scroll down to Call Pickup, and select the checkbox to "Mute notifications".

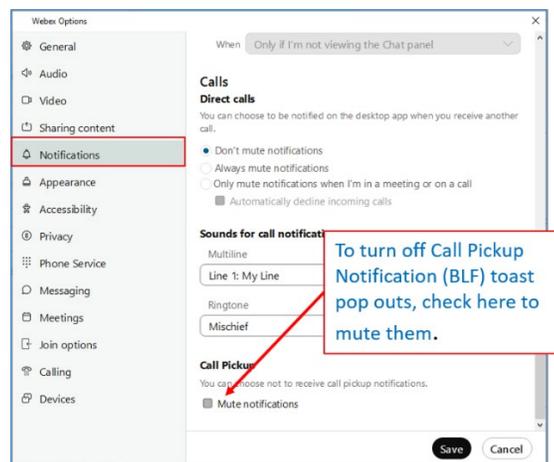


Figure 39 Call Pickup (BLF) Notification – Disable

## ***Additional Information***

For additional UCaaS with Webex information, please visit the Comcast Business | Masergy [Software and Downloads](#) page for guides and tutorials.

To schedule a training session with our UC Trainers, please send an email to [uctraining@masergy.com](mailto:uctraining@masergy.com)