

Samuel Merritt University Information Technology

WebEx Telephony User Guide



**Samuel Merritt
University**

September 2024

Webex Application Guide

Cisco Webex is the Samuel Merritt University's telephone service. The Webex application can be used on a desktop, laptop, tablet or cellular device to make and receive phone calls using your SMU phone number. Webex calling allows encrypted calls from any location, whether on or off campus. Webex also allows self-service control over your phone settings including call forwarding, voicemail, do not disturb, blocking numbers and many more.

Contents

Getting started

- Installing Webex client on a desktop or laptop 3
- Steps for sign-in on a desktop or laptop 4
- Installing Webex application on an iOS device 6
- Installing Webex application on an Android device 7

Using Webex

- Making a call 8
- In-call features
 - Hold, Transfer, Conference 8, 9
 - Audio, Video 9, 10
 - Keypad, End call 10
- Other Settings
 - Settings panel, Call settings, Personal Profile, 10, 11
 - Status Adding Contacts 12

Set up and configure voicemail

- Set up and access voicemail in the Webex User Portal 12, 13
- Manage voicemail in the Webex application 13

Using Webex phone with MS Teams

- Add Webex to Teams client 14

Support and troubleshooting

- Important Cisco Webex Help Center links 15
- Troubleshooting 15
- Check for app updates 15
- Check Webex status 15

Getting Started

How to install Webex on a desktop or laptop and log in for the first time.

Before beginning, please check whether the Webex client is already installed on your computer. Search for the Webex icon on the Start menu in Windows or the Launchpad for Macs.

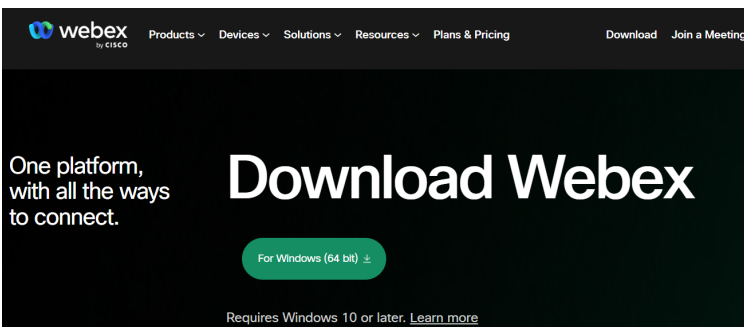


Cisco Webex

Note: SMU issued Laptops will be already installed with WebEx app, option 1 below will not apply for SMU issued laptops as admin rights required to download any new applications.

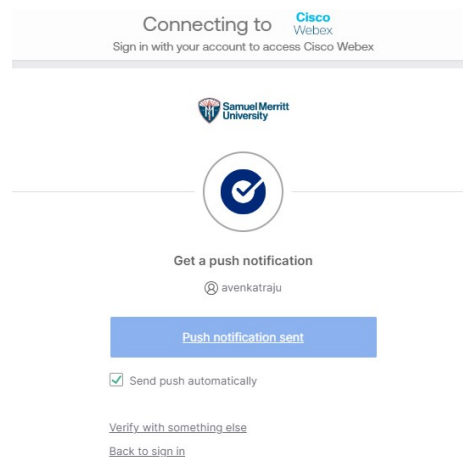
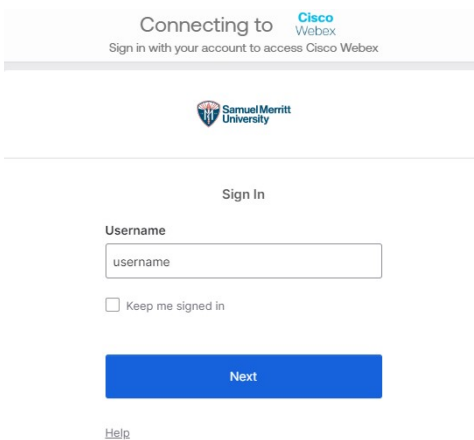
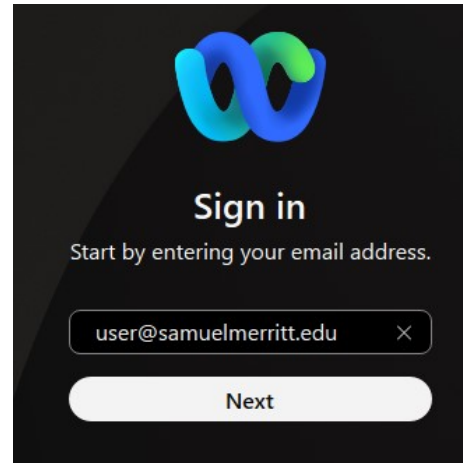
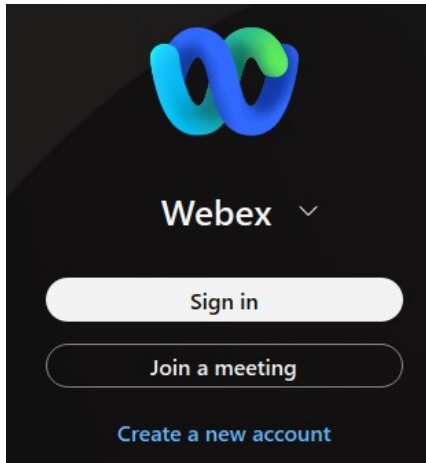
Option 1 - If Webex is not installed, follow these steps:

1. Go to <https://www.webex.com/downloads.html>
2. Choose the appropriate download as per the platform and operating system your running on.
3. Sac the QR code to install on Mobile devices.

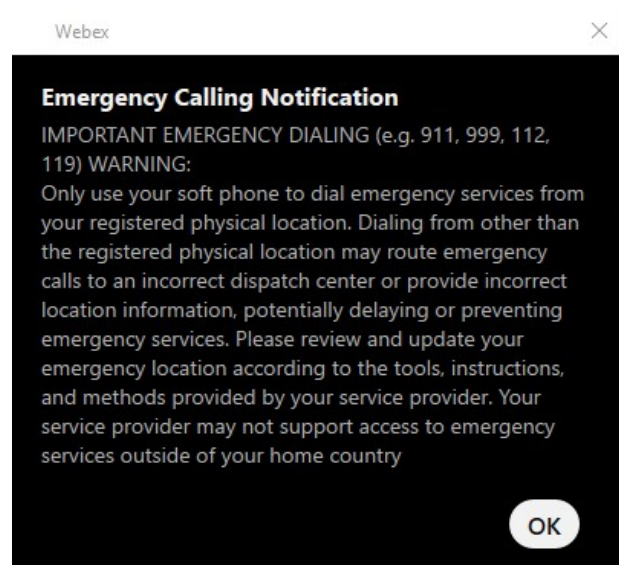


Steps for sign-in on a desktop or laptop once installed

1. Once the Webex application has been installed, open it using the Webex icon.
2. After the login screen opens, enter your SMU email address (abcdef@samuelmerritt.edu).



3. Enter the requested information as prompted.
4. Read the Emergency Calling Notification and click OK.

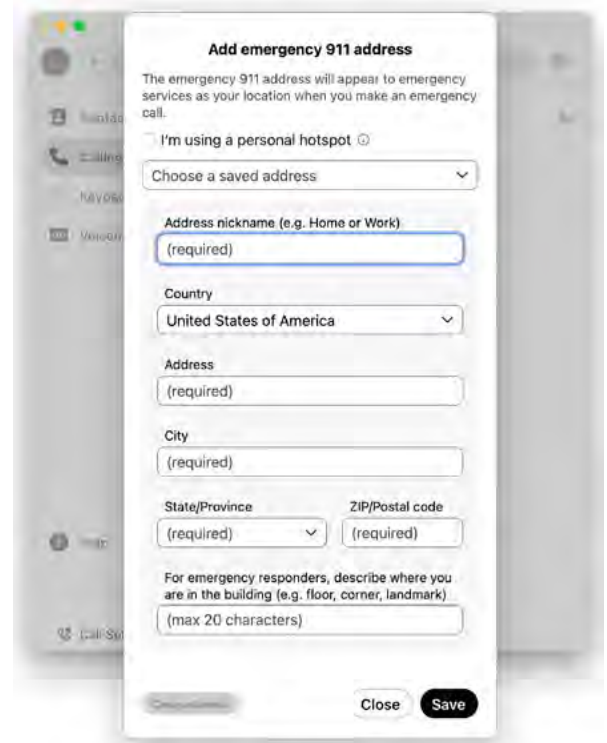


5. **Critical:** Enter your emergency (e911) location information

If you use the Webex Calling app on a desktop or laptop, you are required to set the Enhanced 911 (E911) location within the Webex application each time your working location changes .

E911 location data is essential for 911 calls to be accurately routed in the event of an emergency and is mandated by federal law.

Complete the form and click **Save**.



Add emergency 911 address

The emergency 911 address will appear to emergency services as your location when you make an emergency call.

I'm using a personal hotspot

Choose a saved address

Address nickname (e.g. Home or Work)
(required)

Country
United States of America

Address
(required)

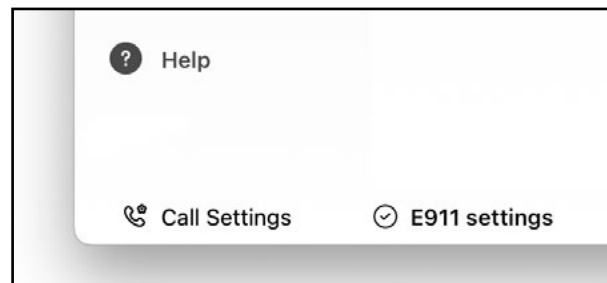
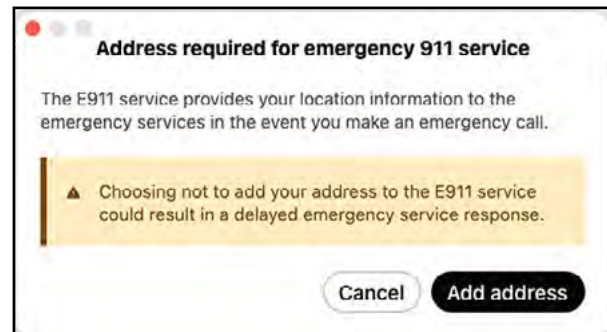
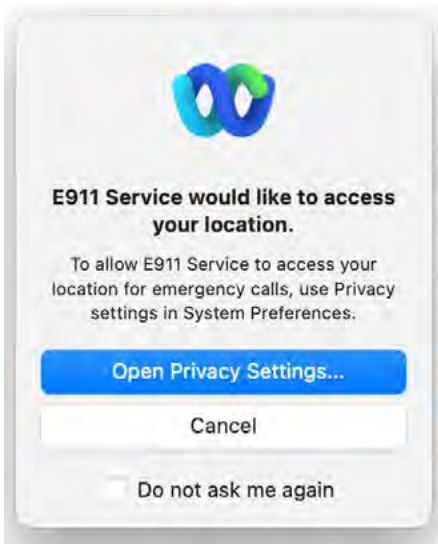
City
(required)

State/Province
(required)

ZIP/Postal code
(required)

For emergency responders, describe where you are in the building (e.g. floor, corner, landmark)
(max 20 characters)

Close Save



Note:

- If your system requires confirmation of your location through device geolocation services, please follow the steps to approve access in your system settings. This action does not replace the user's requirement of setting or confirming a new location within the Webex application each time the device is moved or your working location changes.
- You can confirm the E911 location data is set by the check icon at the bottom of the Webex window. You can update or change your location by clicking on this button.

Installing and logging in to the Webex application on an iOS device

1. Download the Webex application from the Apple App Store. Verify that it is the **Webex** application and not Webex Meetings, Webex Events, or Webex for Intune.



2. SMU Issued Apple devices is pre-installed with Webex application

3. Click “Get” to install the application if its personal device.

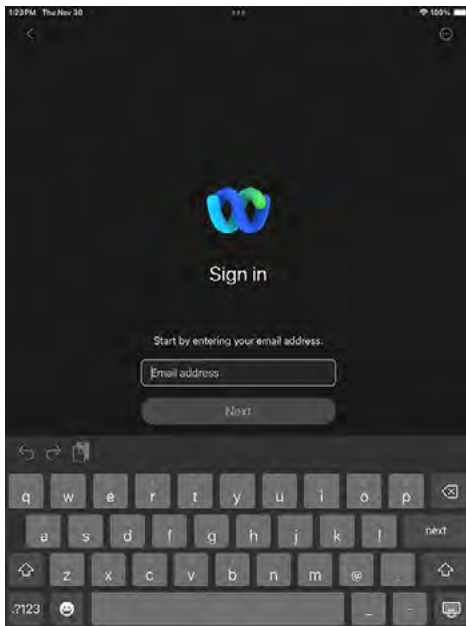
4. Once installed, open the Webex app.

5. Enter your SMU email address and click Next.

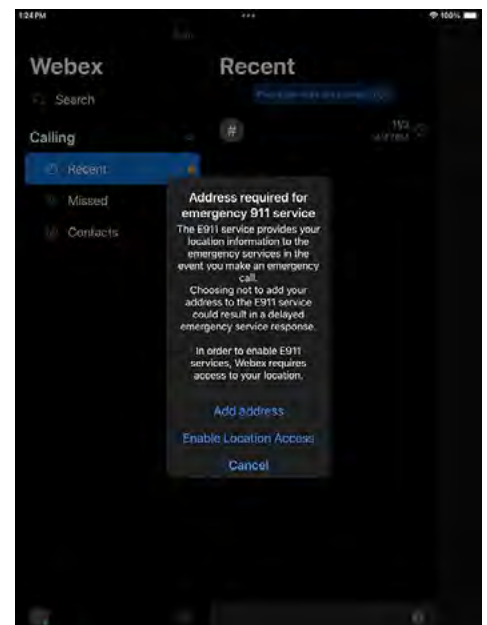
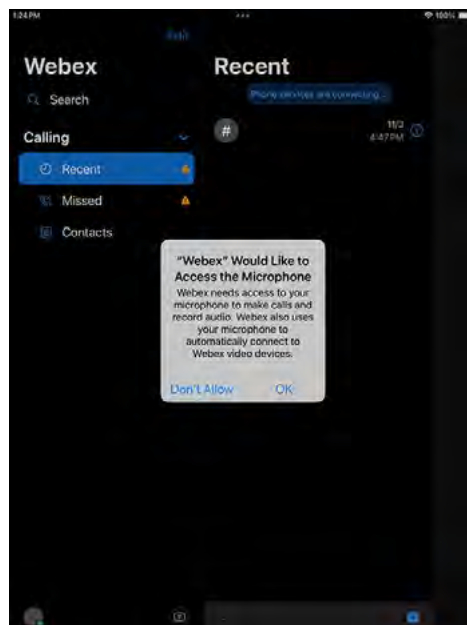
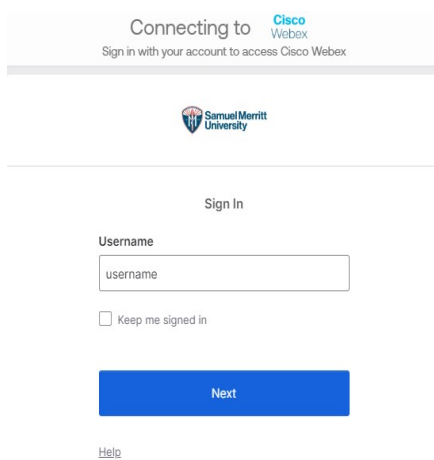
6. You will be redirected to Okta page for MFA.

7. Once logged in, you will be asked to accept a variety of permissions before you are able to start using the app. For “contacts, notifications, microphone, camera/video”, you only need to **allow microphone** for the app to work.

8. You are required to set the Enhanced 911 (E911) address and/or enable location access for the Webex application.



E911 location data is essential for 911 calls to be accurately routed in the event of an emergency and is mandated by federal law.

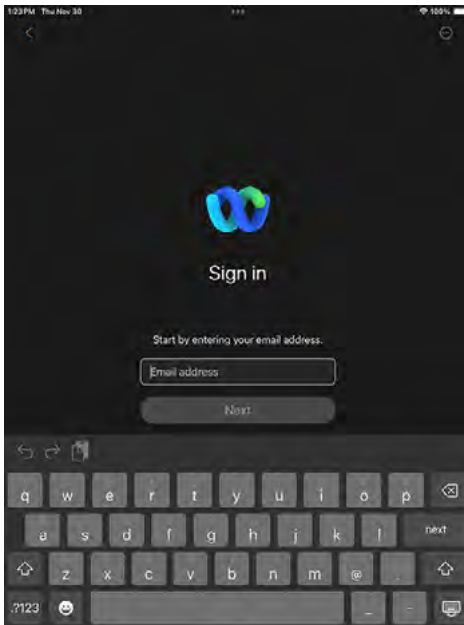


Installing and logging in to the Webex application on an Android device

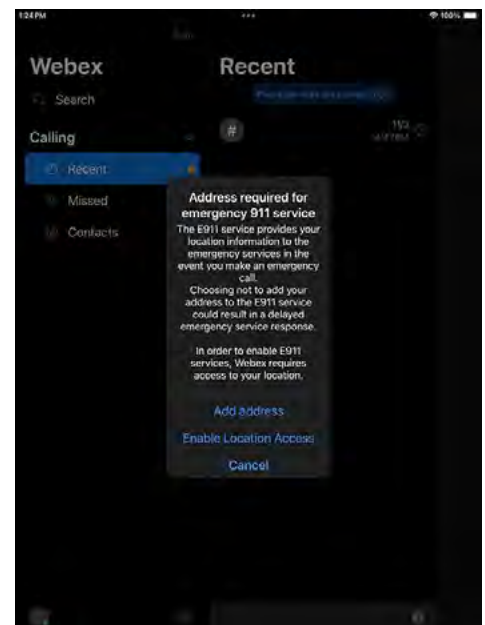
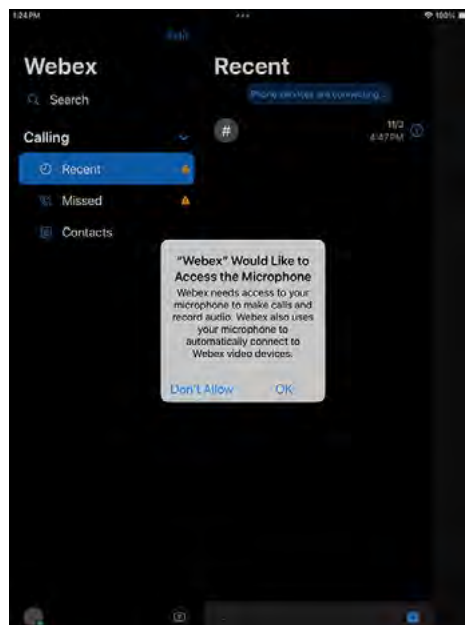
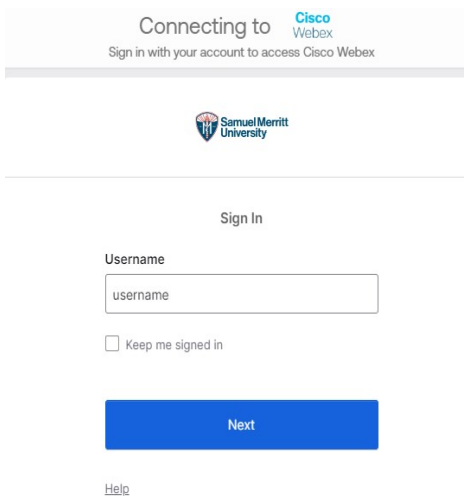
1. Download the Webex application from the Google Play Store. Verify that it is the **Webex** application and not Webex Meetings, Webex Events, or Webex for Intune.



2. SMU Issued Apple devices is pre-installed with Webex application
3. Click to install the application.
4. Once installed, open the Webex app.
5. Enter your SMU email address and click Next.
6. You will be redirected to Okta page for MFA.
7. Once logged in, you will be asked to accept a variety of permissions before you are able to start using the app. For “contacts, notifications, microphone, camera/video”, you only need to **allow microphone** for the app to work.
8. You are required to set the Enhanced 911 (E911) address and/or enable location access for the Webex application.

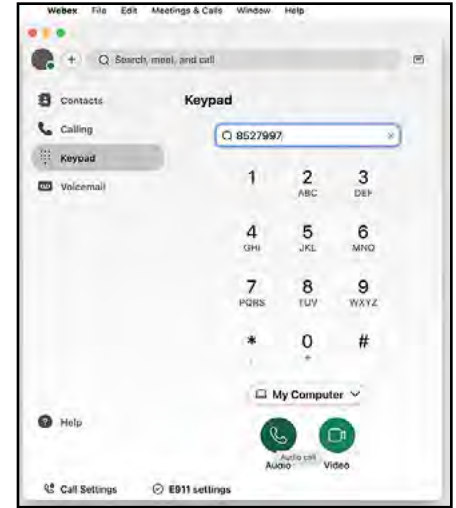
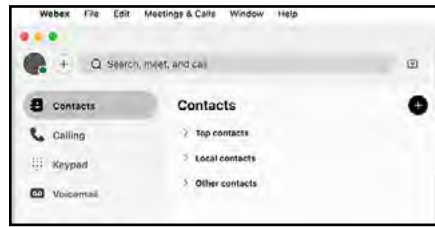
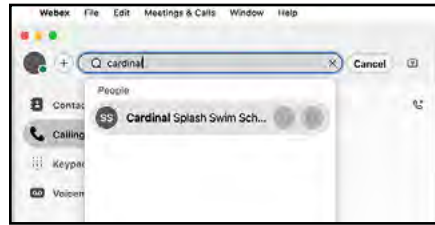


E911 location data is essential for 911 calls to be accurately routed in the event of an emergency and is mandated by federal law.



Using Webex

Making a Call

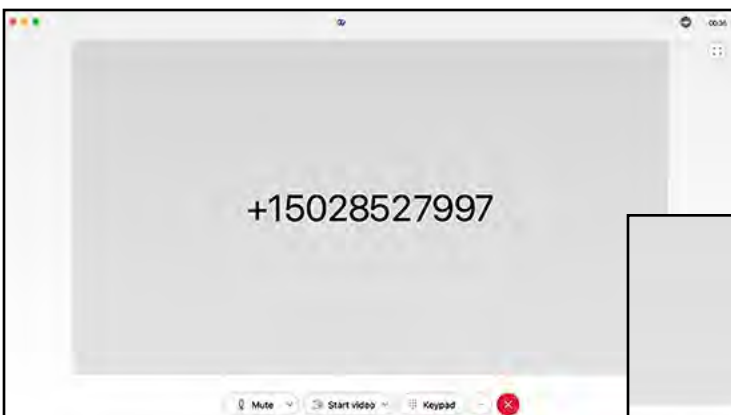


There are many options for making a call:

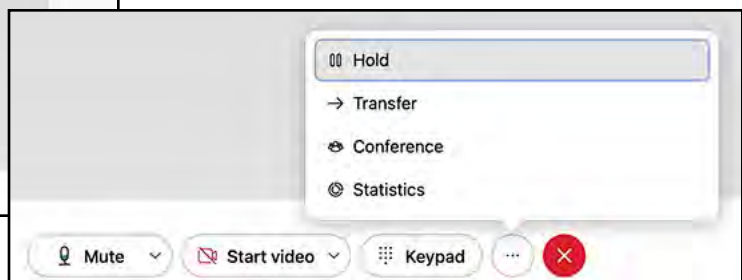
1. Select **Calling** on the left navigation pane to review your call history. You can select from this listing and click on appropriate button to begin the call.
2. You can **Dial by Name** by looking up individuals or number in the SMU Webex system or in your contacts. Search by name and auto-populate will provide a list. Or use the drop downs under **Contacts** in the left navigation.
3. You can use the **Keypad** to dial direct. For standard dialing, you can dial a +91 then ten digit number (+91 5108799200) for external calls. After entering number, press either **Enter** on your keyboard or press the **Audio** button on-screen.

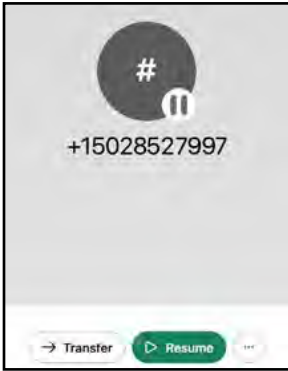
In-Call features

Once a call is connected, a new window will appear with additional options:



1. Select the **More** button (3 dots) to **Hold** a call, **Transfer** a call or change to a **Conference** call.

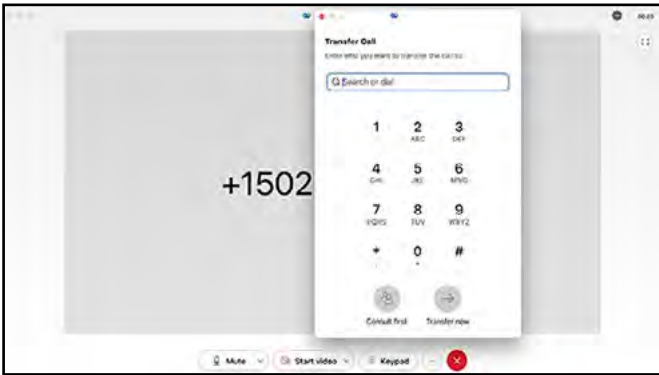




Selecting **Hold** will place the call on hold with music playing. To continue the call, select the **Resume** button.

2. Clicking **Transfer** within the Hold panel or within the main panel More ... options will open the **Transfer Call** window.

Enter the number or search for name or contact. When done, press either **Consult First** or **Transfer Now**.



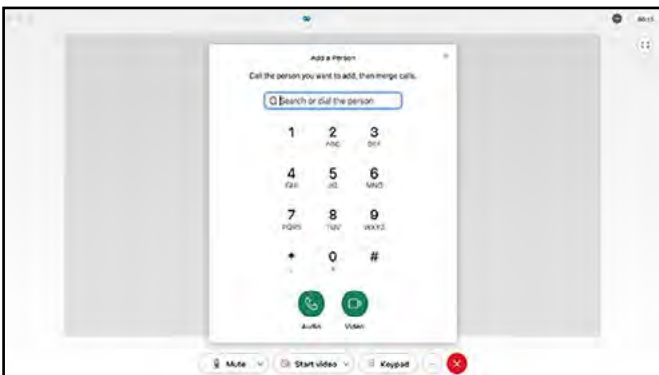
Consult first

Consult First will allow you to let the new person answer to inform them that a transferred call is incoming. You will then select the **Complete Transfer** button to finish.



Transfer now

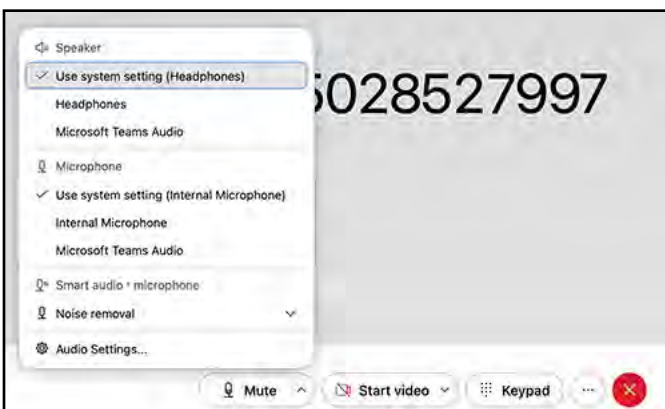
Transfer Now sends the call on hold directly to the forwarding number.



3. Clicking **Conference** within the main panel will open the **Add a Person** window.

Enter the number or search for name or contact. When done, press **Audio** button to connect. You will then select the **Merge Calls** button to join the calls.

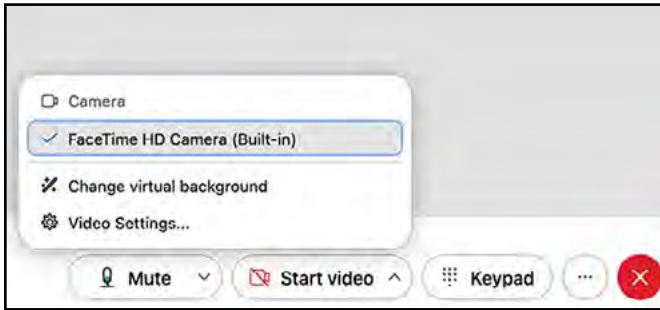
You may conference with up to 6 users by repeating these steps to add callers.



4. **Audio Settings** can be controlled on the first button on the main panel.

You can use the default system settings (indicated by the ✓) or determine the necessary selections for using headphones or mics. This will vary depending on computer or external device.

The **Noise Removal** settings can be customized to isolate your own voice or to minimize background noise.



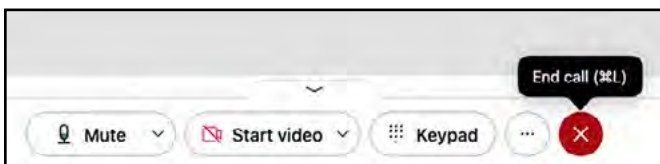
5. **Video Settings** can be controlled with the **Start Video** button on the main panel. * Webex defaults to audio only.

SMU's Webex allows for video on one-to-one calls but not a conference or group meeting.



6. The **Keypad** button on the main window allows for input while a call is in progress.

You can select numbers or use your computer's keyboard to input numbers.



7. The red **X** on the right of the main call panel will **End** the call.

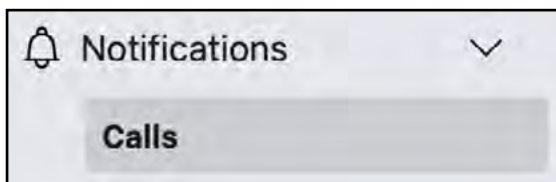
Using Webex continued

Settings Panel

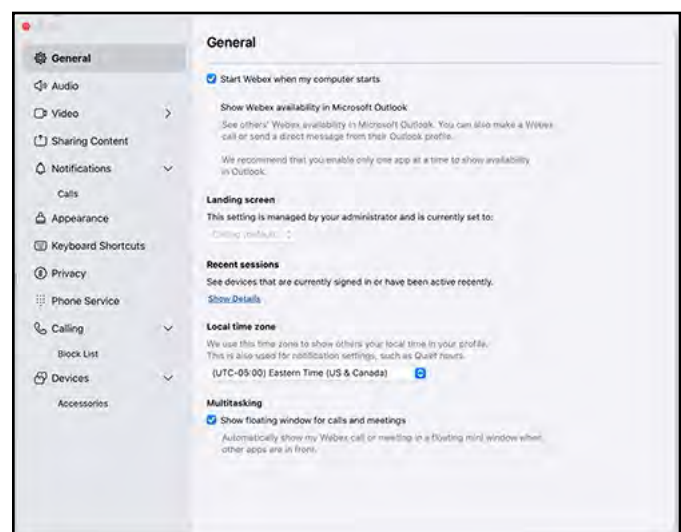
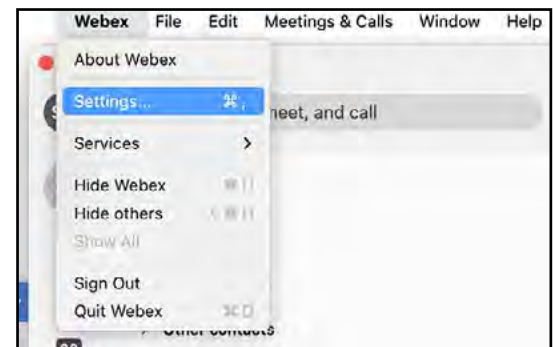
Located under the Webex menu dropdown, most of your individual preferences can be adjusted in the **Settings** panel.

Key items to consider are:

1. **Notifications** for **Direct Calls** and setting **Quiet Hours** to mute calls and alerts.

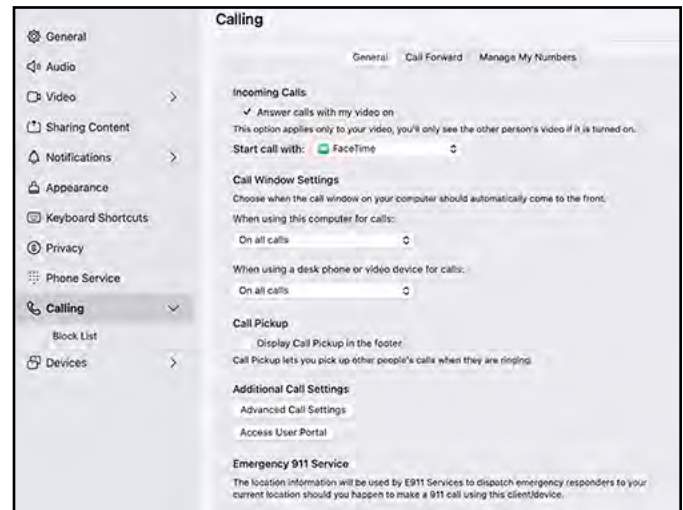
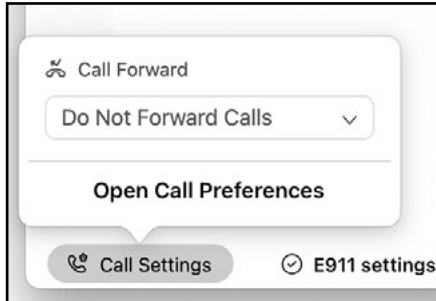


2. **Privacy** controls allow you to set your availability and status. However, this also determines your ability to see the same for other users.



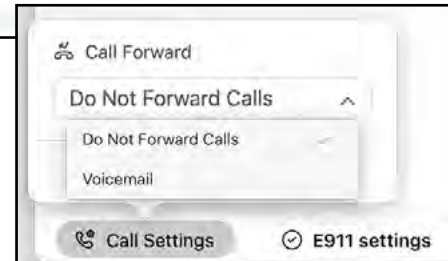
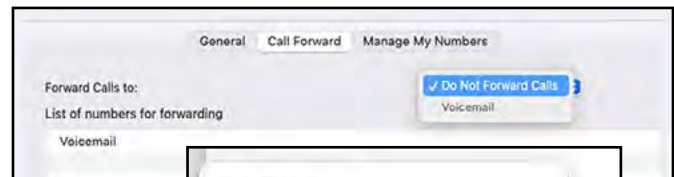
Call Settings

You can access the **Call Settings** from the **Settings** Panel or at the bottom left on the main Webex application center.



1. **Call Forward** defaults to a **Do Not Forward Calls** (receiving calls) unless changed in either location.

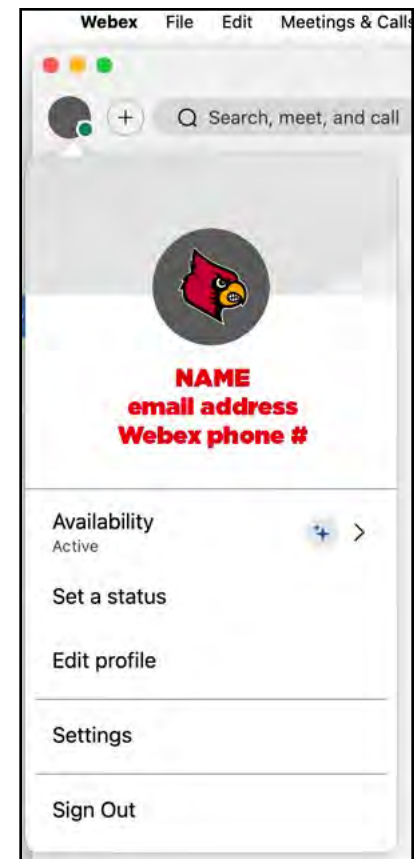
You can indicate that calls should be sent to specific phone number (like a cell phone) or sent to your Webex Voicemail. If activated, an icon next to Call Settings will appear.



Personal Profile, Availability and Setting a Status

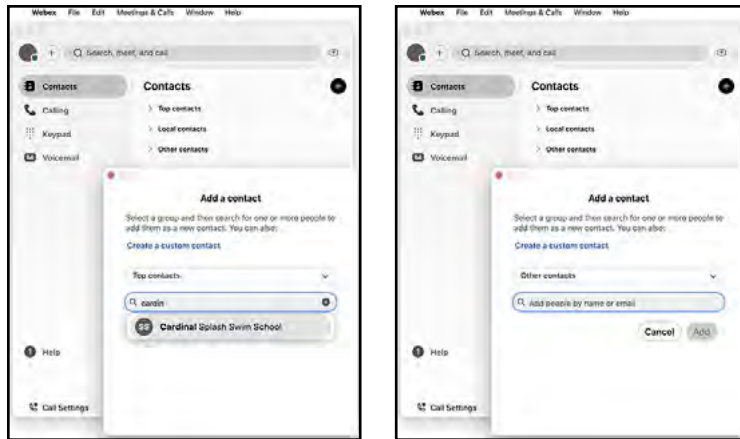
Under the Profile icon in the upper left of the main Webex application center, you can click to open the Profile panel.

1. **Availability** allows for **Active** (receiving calls), **Busy** (time determined) or **Do Not Disturb** (time determined).
2. **Setting a Status** can be personalized, set as options listed and time determined.
3. Your **Personal Profile** defaults to a limited aesthetic. You can use this **Edit Profile** option to add a profile picture, set a preferred display name and personal pronouns, configure your cover image visuals.
4. Another link for opening the **Settings** panel.
5. Click to **Sign Out** of Webex application.



Using Webex continued

Adding Contacts



You can add **Contacts** or create a **Group** within Webex for your frequently used numbers or important university #s.

The **+** button allows you to **Add a Contact** and select the placement of that individual within your contacts.

You can look up individuals or numbers in the SMU Webex system by name and auto-populate will provide a listing to select from. Or you can click the **Create a Custom Contact** to open a new window and enter the person's information directly.

Setting up and configuring Voicemail

Voicemail can be accessed through either the **Webex User Portal** or the **Webex application**. Personal voicemail boxes are for individual users and require setting up.

Physical phone users: You must first create a PIN in the Webex User Portal to access a personal voicemail box from a physical phone. A PIN only needs to be set up the first time you access your voicemail box, or when you have forgotten your PIN and need to reset it.

A PIN is not needed to access voicemail from the Webex app or Webex user portal.

You can listen to and/or manage your Voicemail via the **Webex User Portal** or the **Webex application**. Your options include the following:

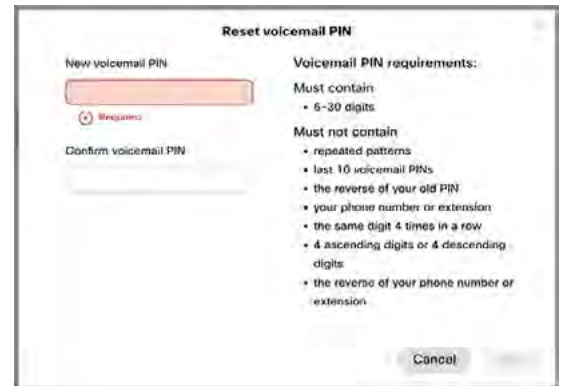
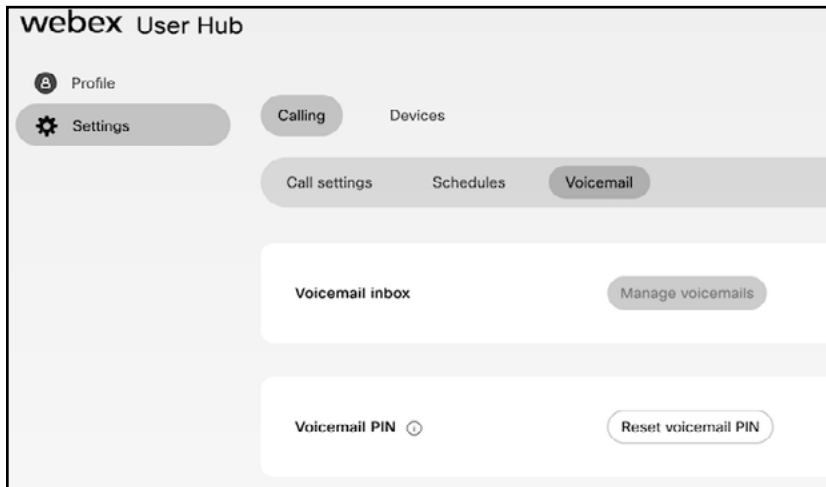
- Voicemail notifications can be e-mailed to you via an audio .wav file.
- Messages will be transcribed.
- Deleting emailed audio files will not delete the voicemail from the system.

Set up or access Voicemail in Portal

1. Go to user.webex.com
2. Login using your SMU email address.



- To get to Voicemail Settings, click **Settings** on left, **Calling** on top menu and **Voicemail** on the submenu.



- Physical phone users:** If you have not established a Voicemail PIN, click on **Reset** Voicemail PIN.

- In Voicemail Settings, the default configuration is set so that all voicemail messages are sent to the user's email as an audio .wav file. If **Voicemail to Email** is desired, make sure the correct email address is set under Additional Settings.





- You are able to view, play, manage and delete voicemails from the User Portal. Note: Deleting emailed voicemails does not delete the voicemails from the user portal.



Access Voicemail in Webex App

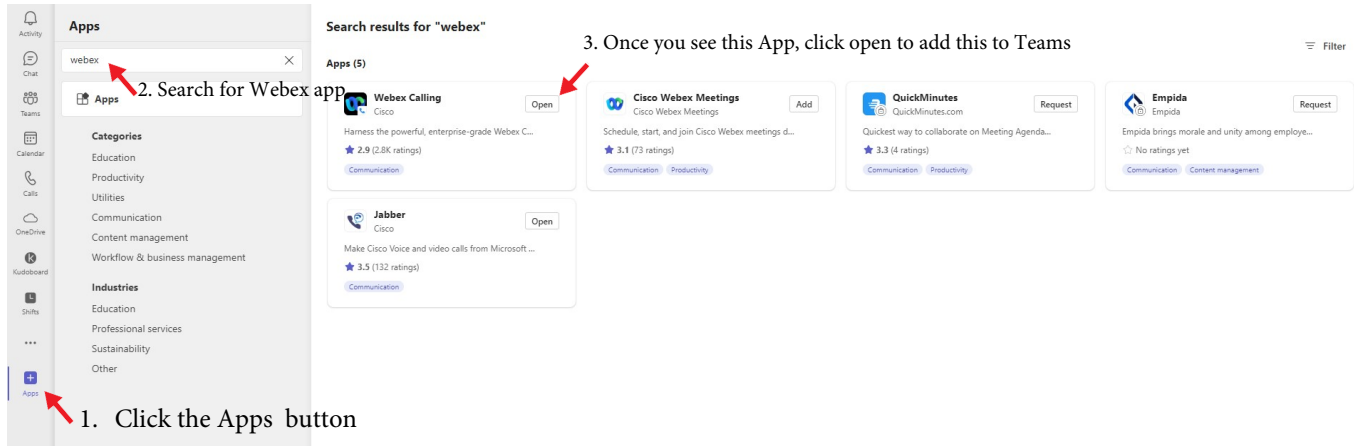
All voicemails will appear and can be played, marked as “unread” or deleted in the Webex application.

- Click  to play the message.
- Either right-click the selected message or use the  to see more details or other options such as delete.

Using Webex Calling with the MS Teams client

Since Microsoft Teams is the preferred collaboration and conferencing software at SMU, users can add Webex for outside phone calls within the Teams client.

Add the Webex App to your Teams application

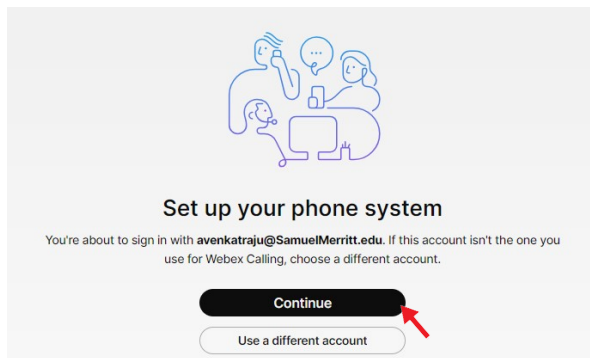


1. Click the Apps button

2. Search for Webex app

3. Once you see this App, click open to add this to Teams

The screenshot shows the Microsoft Teams interface. On the left, the 'Apps' button is highlighted with a red arrow. In the center, a search bar contains 'webex'. Below the search bar, the 'Webex Calling' app is listed with an 'Open' button highlighted by a red arrow. Other apps like 'Cisco Webex Meetings', 'QuickMinutes', and 'Empida' are also visible.

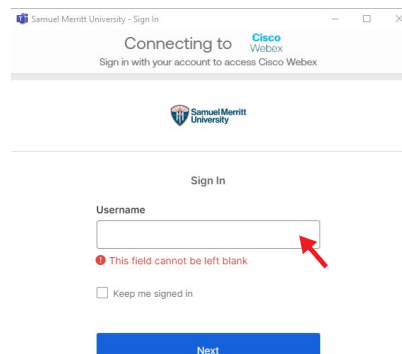


Set up your phone system

You're about to sign in with **avenkatraju@SamuelMerritt.edu**. If this account isn't the one you use for Webex Calling, choose a different account.

Continue

Use a different account



Samuel Merritt University - Sign In

Connecting to **Cisco Webex**

Sign in with your account to access Cisco Webex

Samuel Merritt University

Sign In

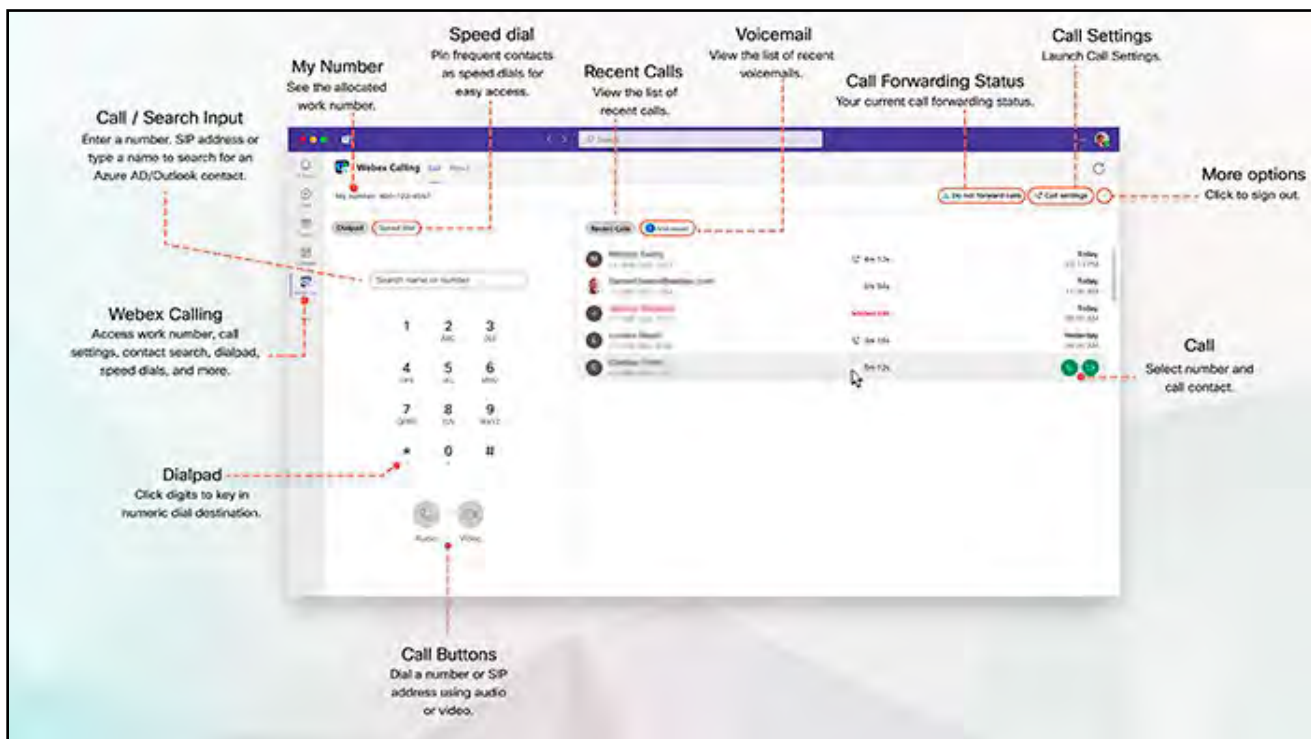
Username

This field cannot be left blank

Keep me signed in

Next

Article on Webex Calling for Microsoft Teams



Call / Search Input
Enter a number, SIP address or type a name to search for an Azure AD/Outlook contact.

Webex Calling
Access work number, call settings, contact search, dialpad, speed dials, and more.

Dialpad
Click digits to key in numeric dial destination.

Call Buttons
Dial a number or SIP address using audio or video.

My Number
See the allocated work number.

Speed dial
Pin frequent contacts as speed dials for easy access.

Recent Calls
View the list of recent calls.

Voicemail
View the list of recent voicemails.

Call Forwarding Status
Your current call forwarding status.

Call Settings
Launch Call Settings.

More options
Click to sign out.

Call
Select number and call contact.

Support and Troubleshooting

Assistance is available through the SMU IT Service Desk @510-907-2555 option 1.

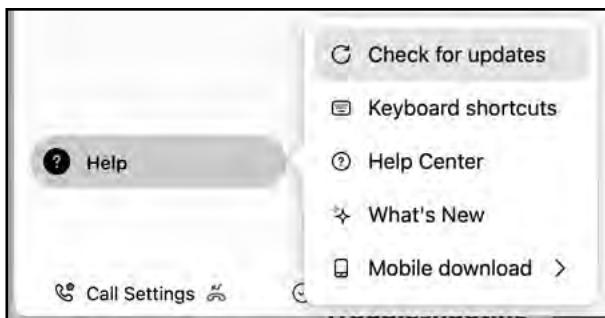
Troubleshooting issues with incoming calls

If you are not receiving incoming calls or calls are going directly to voicemail, please check the following:

1. Make sure that you are signed into the Webex Application (see page 4).
2. Check to see if your calls are set to go directly to voicemail by clicking on **Call Settings** at the bottom left of your Webex app. You will see **Call Forward** with a drop-down box. The options are Do Not Forward Calls or Voicemail. If Voicemail is selected, change to **Do Not Forward Calls** to receive incoming calls.

Webex App Updates

The Webex application will automatically apply any available update when restarted. Keeping your Webex updated can prevent problems and fix existing issues.



To manually check for and run any available Webex desktop app updates to ensure the application is current.

Check for updates from the **Help** button on home screen of the Webex application. Click the **?** at the bottom left, and then click **Check for updates**. When an update is available, you may see “Update Ready” beneath the Voicemail icon in the Webex app navigation menu and can click that message to install the updates.

Check online for Webex Status

[Webex / Cisco Status](#) information