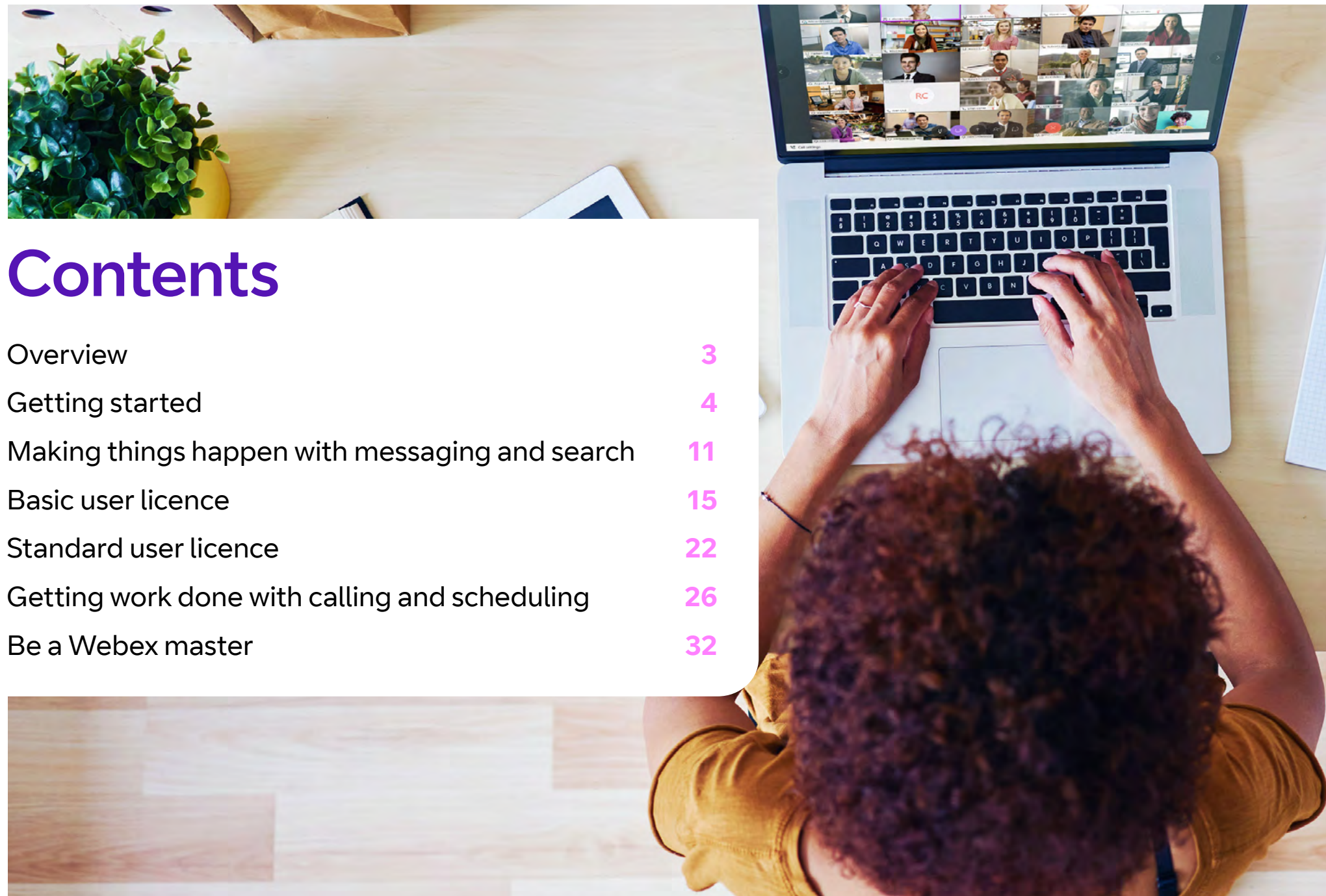




Getting started with Cisco Webex

Quick start guide

btwholesale.com/ciscowebex



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Webex works for all types of teams

The growing team

People come and go. New hires need a smooth joining experience.

Securely exchange personal information with the company and easily access information to quickly be productive.

Meet their team as a group and have one-on-one mentoring sessions.

Enrich the hiring process, from interviews to contract signing and orientation information.

The mobile team

You and your team need the flexibility to get things done while working on-the-go. Being able to access information from multiple locations and devices is key to moving work forward even when you aren't in the office.

Your team can use Webex through the desktop, mobile, or web apps to get information quickly, seamlessly, and securely.

No matter where you are, your team can collaborate.

The distributed team

Your team is spread around the world, which allows you to attract and retain talent anywhere.

Use spaces and teams to access and share the most valuable knowledge from and with people all over the company.

Answer questions quickly from your mobile device, at any time of day.

Make virtual leaders more present and involved while avoiding information overload.

The creative team

You need to keep the creativity at a high level and deliver promptly, regardless if the stakeholders are internal, external, local, or international.

Use pictures and drawings, not just words, to describe their idea and provide feedback.

Easily have impromptu or scheduled video calls with any internal or external stakeholder to review documents live and see facial reactions.

The project team

Task-oriented and deadline-driven. Great team coordination is necessary as well as regular sync-up to measure progress and discuss tasks.

Clear audio and video meetings for sharing content and making decisions.

Collaborate with external vendors, partners, and suppliers.

Always be available for your stakeholders from your mobile device.



Getting started

[Get to know Webex >](#)

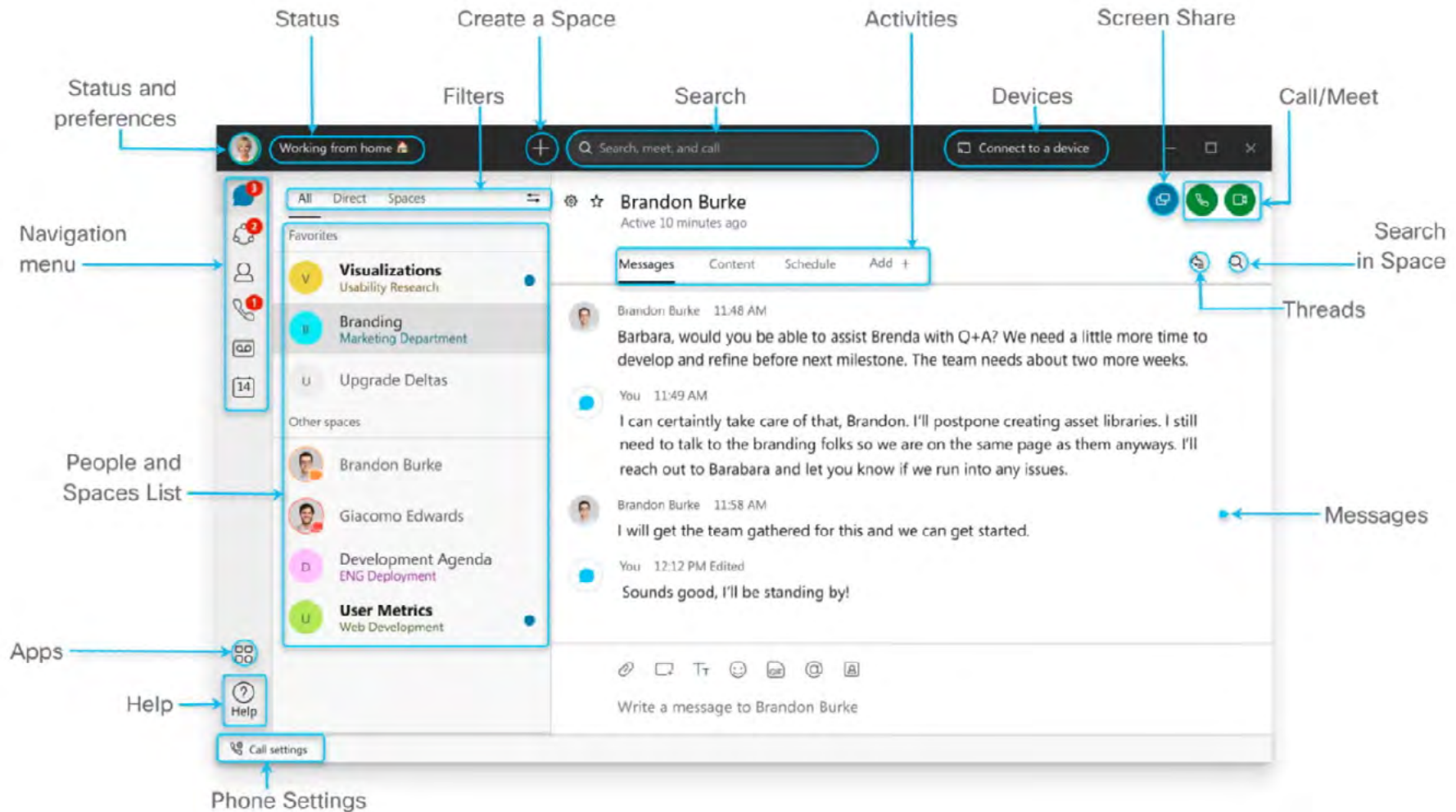
[Customise the app >](#)

[Create teams and spaces to manage all your communication and collaboration needs >](#)

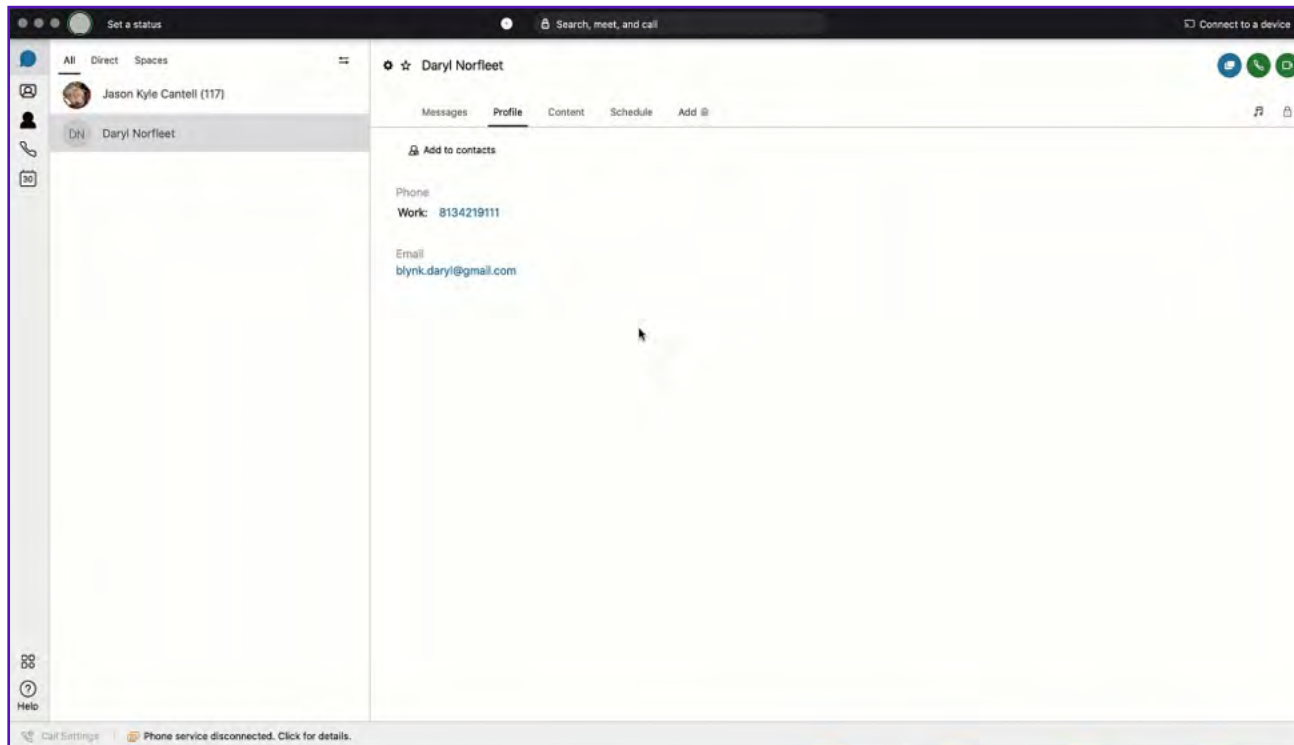
[Create a team >](#)

[Create a space >](#)

Get to know Webex



Customise the app



Add a profile picture

A clear picture of you makes it easier for others to reach out to you.

Step 1

Click on your initials on the top left corner.

Step 2

Click on your initials in the window that opens.

Step 3

Select a picture.

Step 4

Change the email address to your name, just under the profile picture

Tip

By clicking on the profile picture and clicking **Settings** you can customise further.

To manage notifications, your camera, and audio settings, click on your profile picture and select **Settings**.

Notifications

Set your notifications to stay up-to-date.

Step 1

Click on **Notifications**.

Step 2

Select the notifications for your spaces, scheduled meetings, and calls.

Step 3

Select your notification sounds.

Step 4

Click **Save**.

Check your camera

Select which camera you want to use in calls and meetings if you have more than one connected to your computer (in-built, external).

Step 1

Click **Video**.

Step 2

Select your webcam from the drop-down list.

Step 3

Click **Save**.

Test your audio

Make sure it's working properly and that you hear the audio notifications at all times.

Step 1

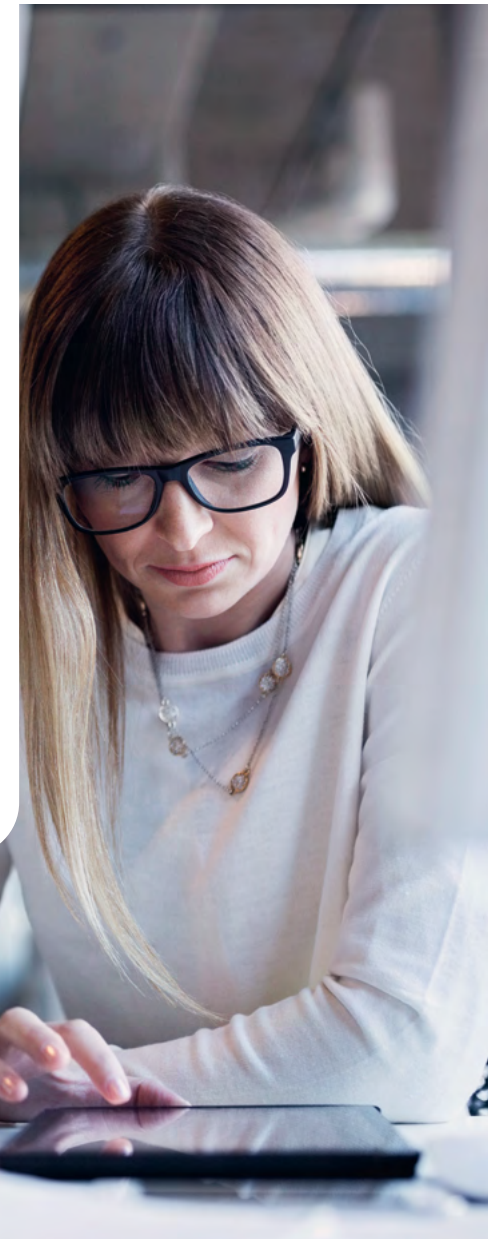
Click **Audio**.

Step 2

Select which device will be used for the microphone, speaker and ringer.

Step 3

Click **Save**.



Create teams and spaces to manage all your communication and collaboration needs

Team

A team is a group of people who are connecting for a longer-term community, a larger project or business objective.

Each team has a space called **General** that everyone belongs to.

You can add any number of additional spaces to the team to divide up projects or priorities within the team.

Space

A space is a group of people who have been invited to work together.

Spaces typically have names that describe what they're for or are named after the people in them if they're one-on-one.

A space can either be standalone or associated with a team. They can grow or shrink as needed.



Create a team

In Cisco Webex, teams help you keep everything organised by categorizing multiple Spaces under a common theme.

Step 1

Go to **Teams**.

Step 2

Choose the **Plus** icon, name the team, and click **Create**.

Step 3


Use the search bar to add team members. Enter a name or email address and pick from the results list. People get added to the General space automatically, but then can join any team spaces on their own.

Step 4

Click **Create**. To create more spaces for the team, click **Create a space** and add the space name.

Create a team

Organise spaces for a group of people with a similar goal. A team could be your department or the people you work with on a project.



Create a space

In Cisco Webex, you can interact 1-1 or you can collaborate with a group of people using spaces.

Step 1

Click the **+** sign next to the Search field.

Step 2

Click **Create a space**.

Step 3

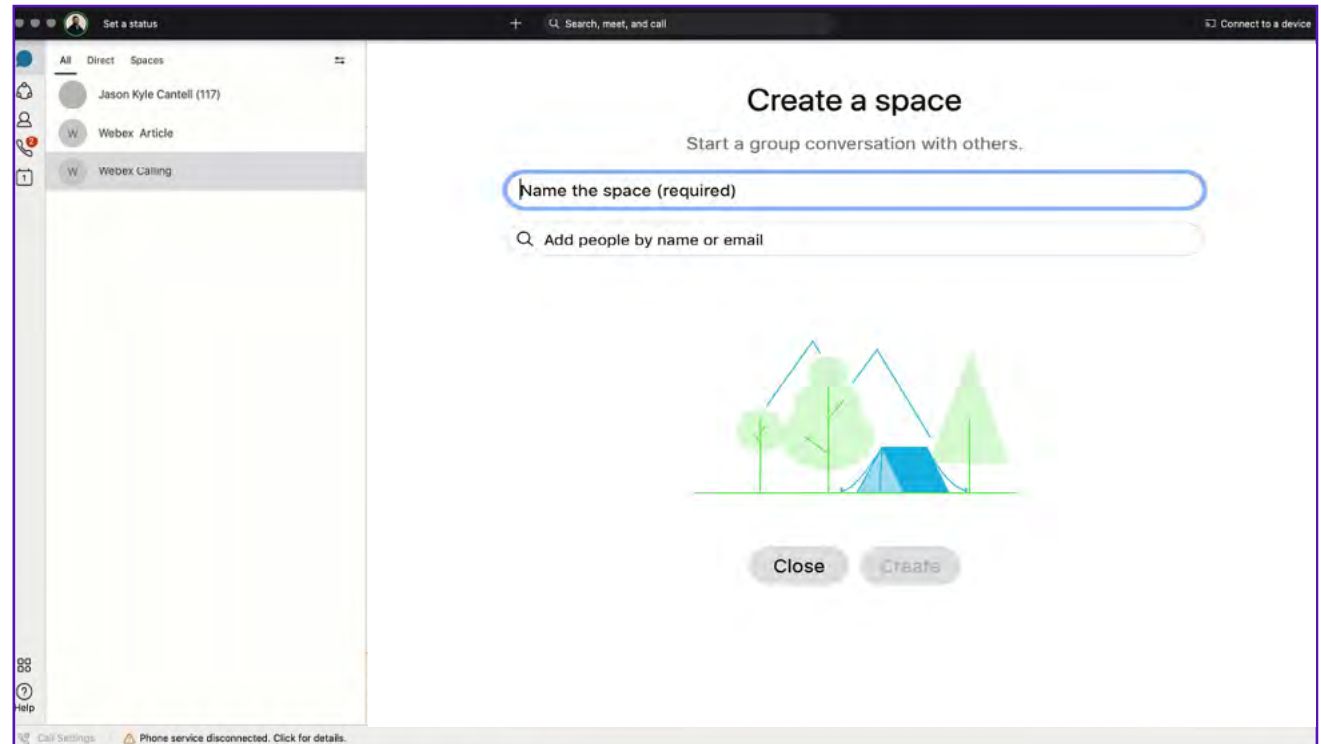
Type a name for your space.

Step 4

Enter the names of people you want to invite.

Step 5

Click **Create**.



Tip

Create a 1:1 space with a co-worker or client to have conversations, meetings, and share files anytime.

Create 1: many spaces to share files, chat and meet with your teams to keep project velocity at top speed.

Making things happen with messaging and search

Powerful messaging >

Sort messages >

Search messages, files and people >

Powerful messaging

@mention

To grab someone's attention @mention their name. They will see @ against the Space, showing that their name has been tagged.

Edit messages

Made a typo? Not a problem, simply hover over your message and click **Edit message**. Then, make your changes and click update. After you update the message, you'll see (Edited) next to it in the space



Send someone a message

You can easily contact internal or external people using the chat panel for 1:1 interactions or group communications in spaces.

Type the name of the person or space in the Search field. Click the person or space name. Type your message and press the enter key.

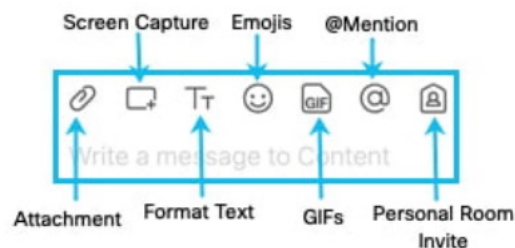
React to messages

Want to add a quick reaction to a message? Hover over the message you'd like to react to and click the Add reaction icon.



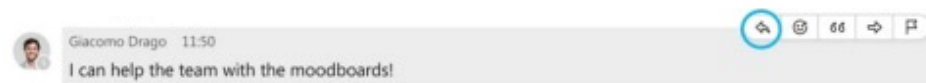
Give your message some personality

You can customise your message by formatting the text, inserting emojis and gifs, or adding attachments and screen captures.

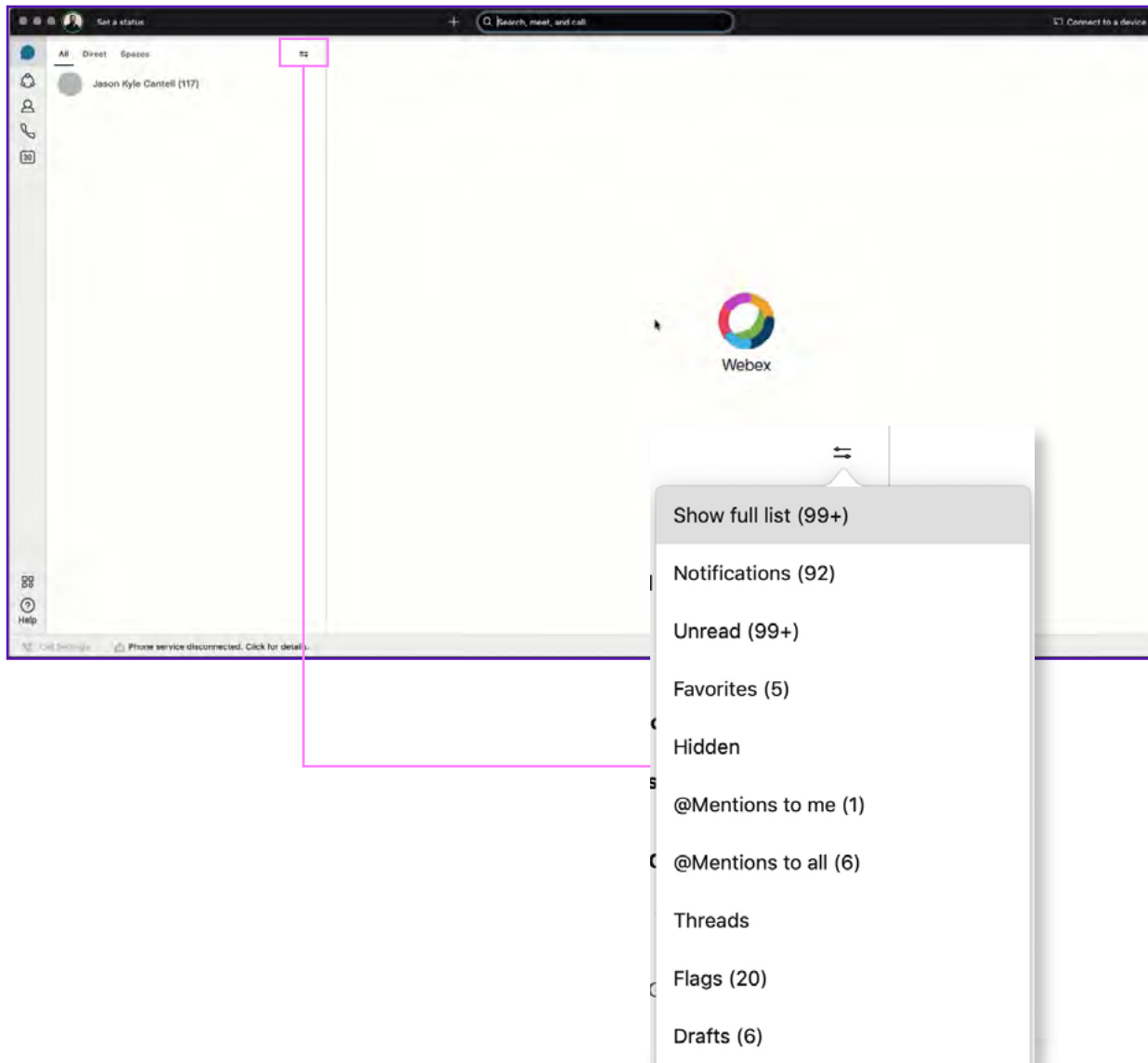


Answer a specific message in a thread

Slide your mouse above the message and use the arrow option.



Sort messages



To help zoom in on priority items and avoid information overload, simply click the Filter icon and select:

Notifications: Shows a list of all spaces where you have notifications selected and something new happened.

Unread: Shows all unread messages.

Favorites: Shows a list of all spaces you marked as favourites.

Hidden: Shows all of your hidden spaces. Hidden spaces no longer show in your spaces list.

@mentions to me: Shows a list of all messages you have personally been @mentioned in.

@mentions to all: Shows a list of all messages where everyone was @mentioned in spaces you are a member of.

Threads: Shows a list of threads within chats and spaces.

Flags: Shows a list of all messages you've flagged.

Drafts: Shows a list of your drafted messages.

Search messages, files and people

Thanks to the advanced search feature, you can easily rediscover people, spaces, messages, and files.

Search for people or spaces

Start typing the person or space name into the Search field.

Search for content in a chat or space

If you are looking for a chat message or file, click the **Search** icon within the chat or space. Then enter the keywords or document name in the search field.

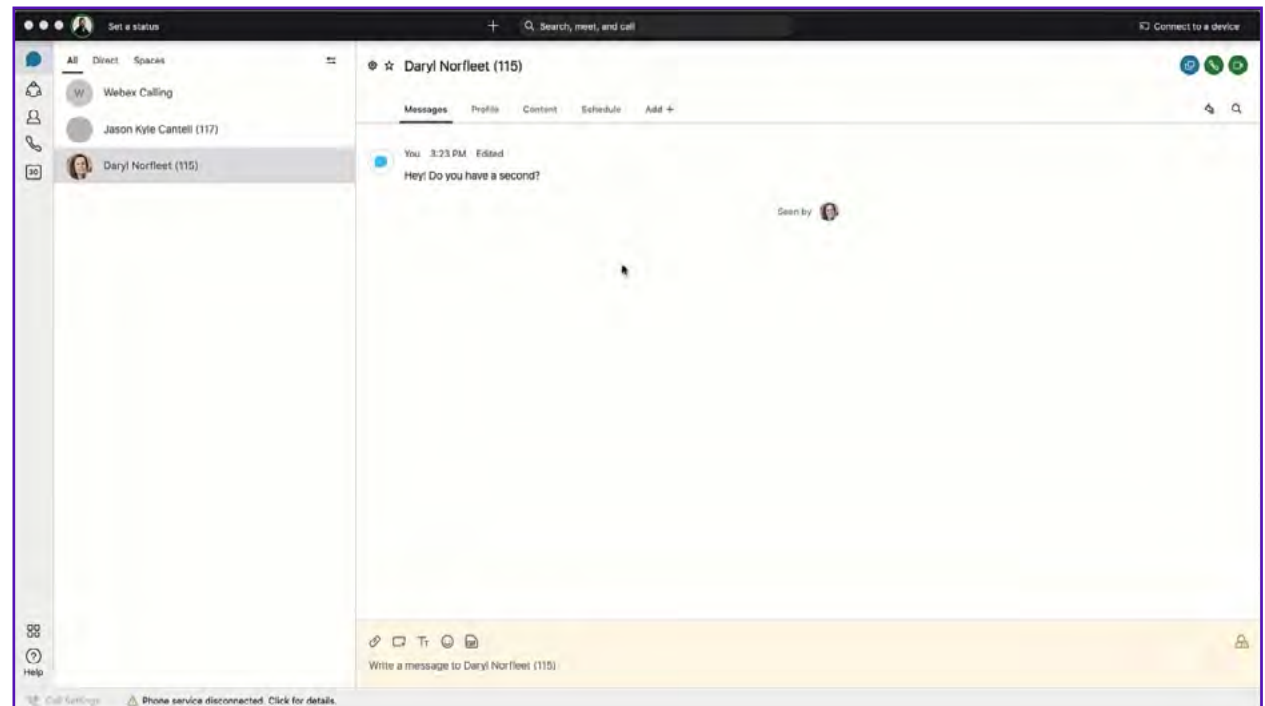
Tip

If needed, refine your search by first typing one of the following:

In: Enter the name of the space and choose a space from the list.

From: Enter the person's name and select the person from the list.

With: Enter the person's name and select the person from the list. The results include spaces you are in with this person.



Basic user licence

Starting a meeting >

Scheduling a meeting >

Starting a meeting

Sometimes when you're working with people in a space, you may decide to have a meeting right away. If a space has more than 3 people but less than 75, you can start an instant meeting directly from that space. The number of people who can join the meeting varies for each space, depending on Webex App licences of people in that space.

From your space, choose **Meet**.

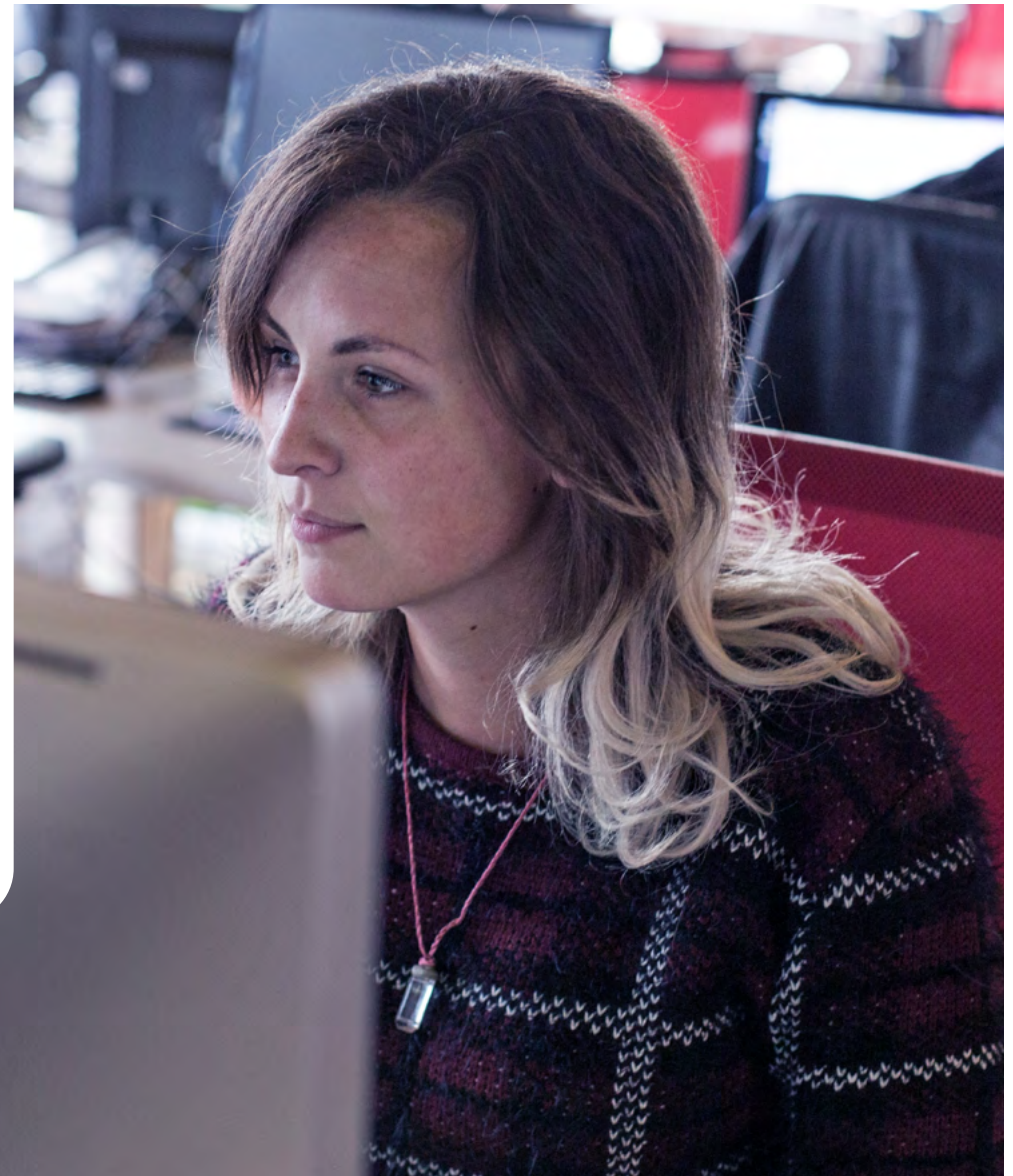


If you search for a space, you can click **Meet** beside the space name to start a meeting in that space.

The meeting starts instantly, and everyone in the space sees a **Join** button in their meeting list and in their spaces list in the app. If people have Smart Notifications configured, they'll also get a meeting notification on their computer or mobile device.



Meeting notifications aren't shown for meetings that are started in spaces that have more than 25 participants.



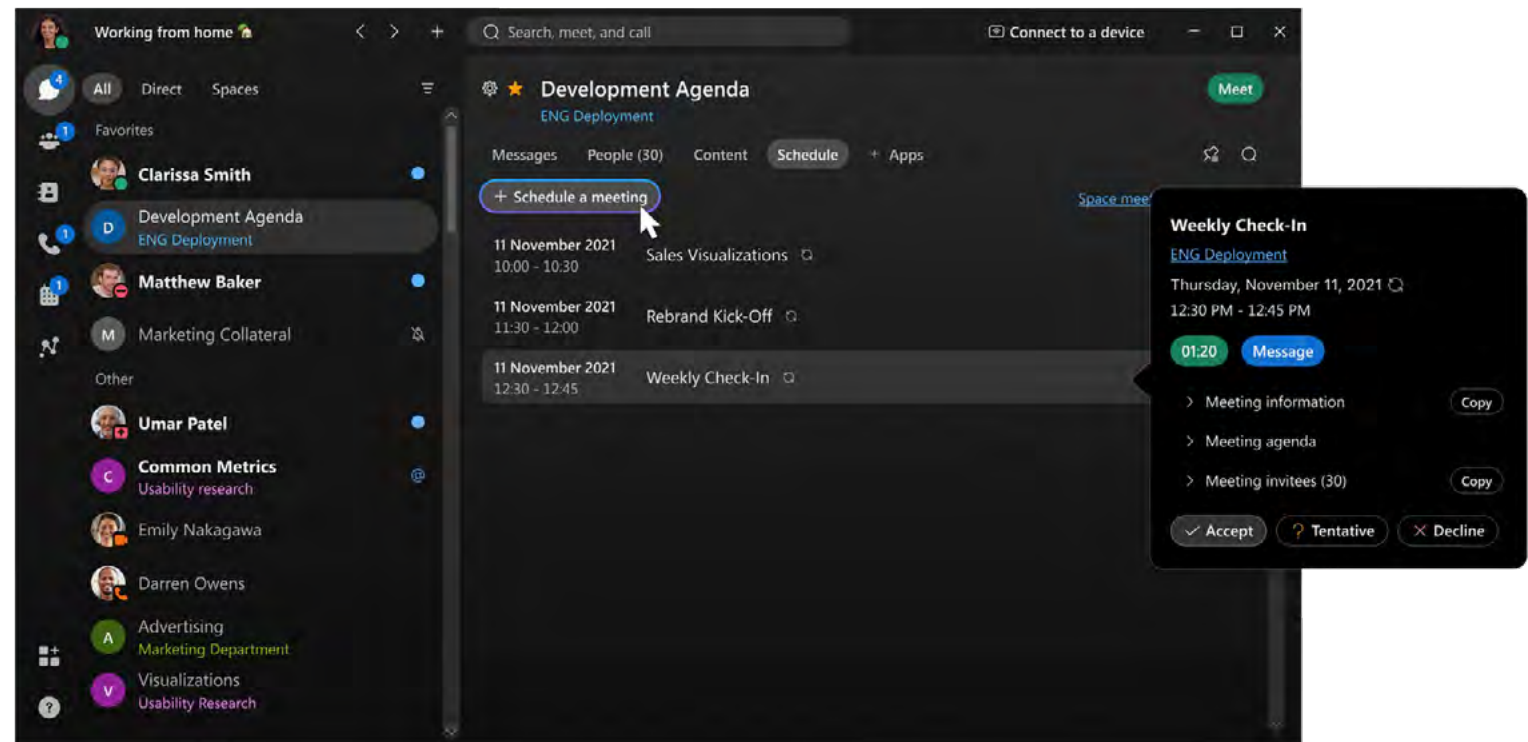
Scheduling a meeting

Schedule a meeting with everyone in your space at a specified date and time, whether it's a space with one or more people. Send calendar invites to everyone in the space to tell them about the meeting and how to join.

The number of people who can join your scheduled Webex team meeting can vary, depending on the account type of the person who created the space.

Choose the scheduler that you want to use to schedule meetings. You can schedule meetings from a space using Microsoft Outlook, Google Calendar, or the Webex App scheduler (if your administrator has set up your account with Cisco Webex Hybrid Calendar Service).

If your administrator hasn't set up your account with Calendar Service or you're using a calendar other than Microsoft Outlook or Google Calendar, use the instructions in Other Calendars.



Scheduling a meeting (cont)

Microsoft Outlook

1. In the space, click **Schedule**.



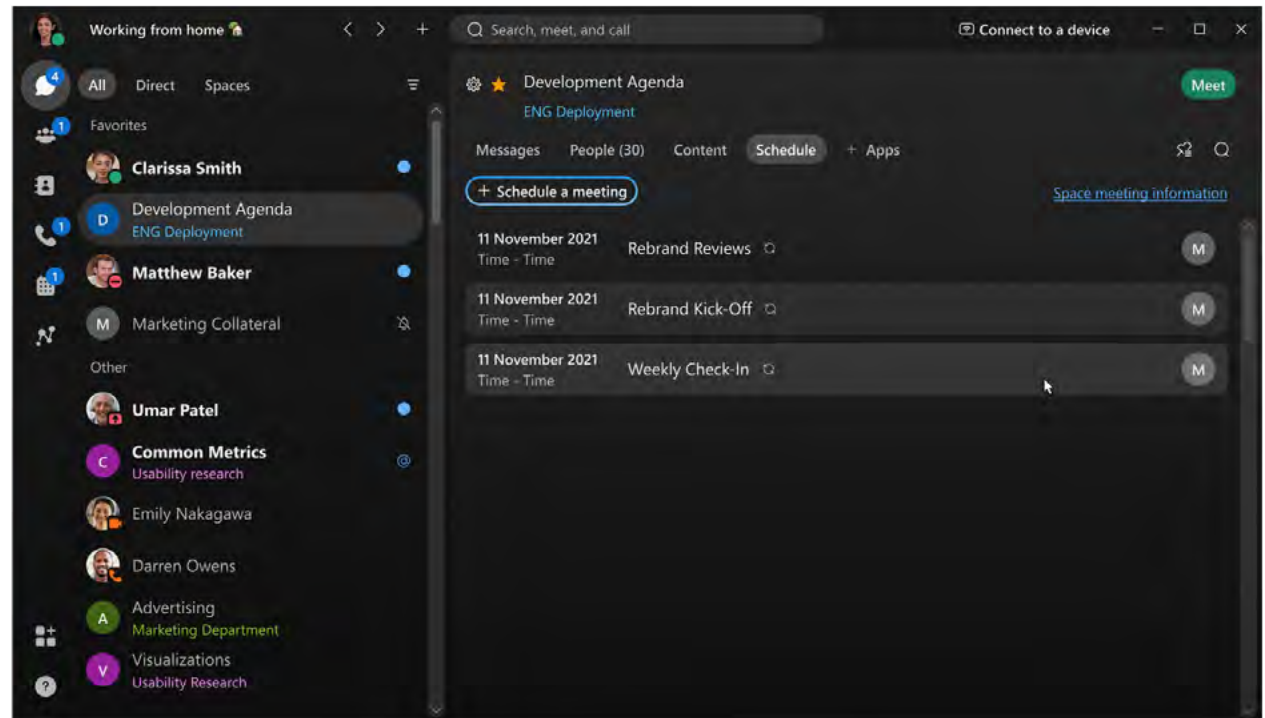
If your administrator has set up your account with the Calendar Service, here's where you'll find all the meetings that are scheduled in the space.

2. Select **Schedule a meeting**.

Webex App opens a calendar invite in Microsoft Outlook that automatically includes email addresses for everyone in the space, the space name as the subject, and “@webex:space” in the **Location** field. Depending on your setup, the invite may also include a link to join the meeting, Join by phone options, and a video address so people can join from any standards-based video system.

3. Specify the date, time, and other details.
4. Add a Cisco Webex room or desk device by selecting **Scheduling Assistant > Add Rooms** on Windows or **Scheduling** or **Room Finder** and then **Add Room** on the Mac and then add the room or desk devices you want to include.

A **Join** button appears on the device 5 minutes before the meeting starts.



Your administrator needs to set up your account with the Calendar Service so you can schedule room devices this way. If you aren't able to add a room or desk device, or if you don't see the Join before the meeting, contact your administrator.

5. Send the meeting invite.

Scheduling a meeting (cont)

Google Calendar

1. In the space, click **Schedule**.



If your administrator has set up your account with the Calendar Service, here's where you'll find all the meetings that are scheduled in the space.

2. Select **Schedule a meeting**.

If you're using Google Calendar with Microsoft Outlook, Webex App opens a calendar invite in Microsoft Outlook. Otherwise, it opens Google Calendar using your default browser. The invite has the space name as the meeting subject, "@webex:space" in the **Location** field, and includes email addresses for people in the space. Depending on your setup, the invite may also include a link to join the meeting, Join by phone options, and a video address so people can join from any standards-based video system.

3. Specify the date, time, and other details.

4. Add a Cisco Webex room or desk device by selecting **Scheduling Assistant > Add Rooms** on Windows or **Scheduling** or **Room Finder** and then **Add Room** on the Mac and then add the room or desk devices you want to include.

A **Join** button appears on the device 5 minutes before the meeting starts.



Your administrator needs to set up your account with the Calendar Service so you can schedule room devices this way. If you aren't able to add a room or desk device, or if you don't see the Join before the meeting, contact your administrator.

5. Send the meeting invite.

Scheduling a meeting (cont)

Webex App scheduler

1. In the space, click **Schedule**.

Here's where you'll find all the meetings that are scheduled in the space.

2. Select **Schedule a meeting**.

3. (Optional) Edit the name of the meeting in **Topic**.

4. Select the **Date and Time** for your meeting and, optionally, add a **Description** of the meeting.

5. All members of the space are automatically invited to the meeting. Add invitees by typing their name or email address. Remove invitees by hovering over their name and clicking **Remove**.

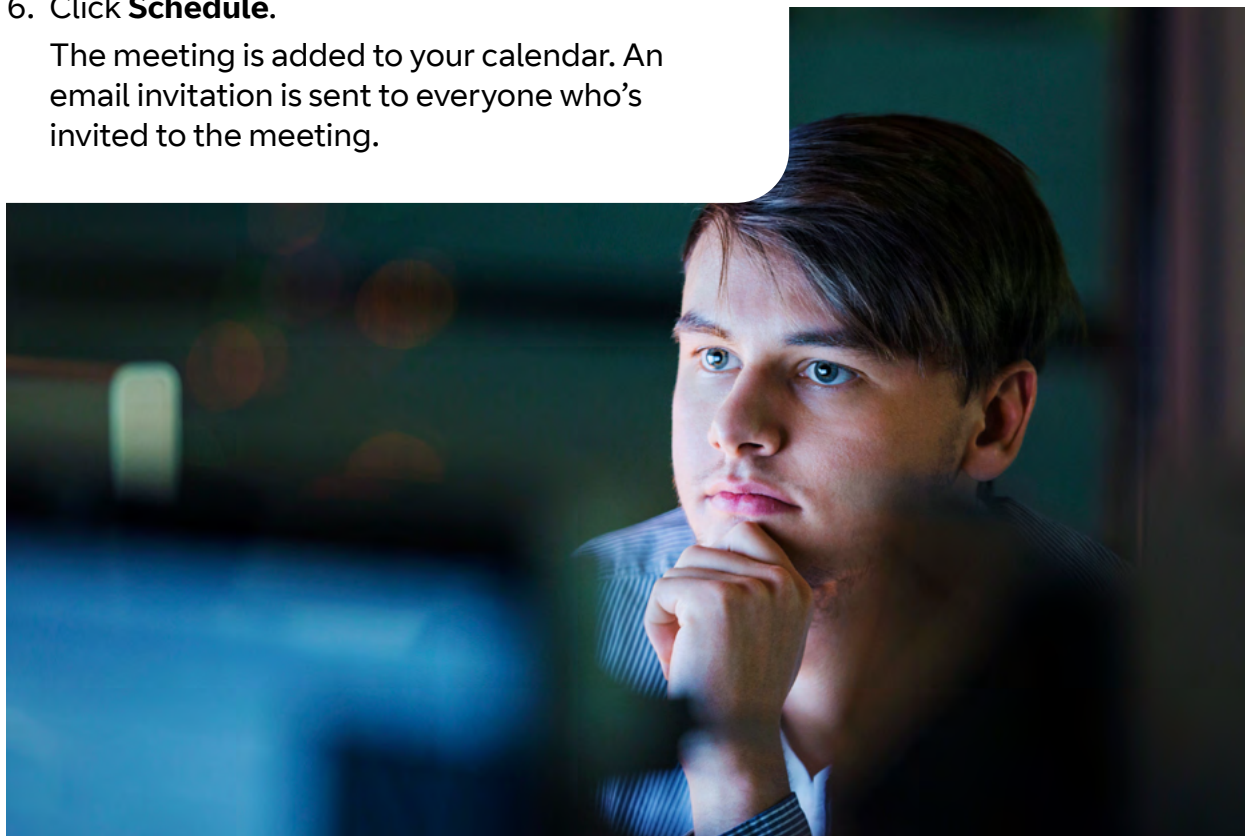
Initially, **Unknown availability** ⓘ shows beside each person's name. If the person is available at the time you selected, the symbol updates to **Available** ✓. If the person is unavailable, the symbol updates to **Unavailable** ✗. If we're unable to retrieve someone's availability, **Unknown availability** continues to show beside that person's name.



If invitees are unavailable, change the meeting time and their availability status updates, or click a time slot in the calendar on the right of the screen to see their availability.

6. Click **Schedule**.

The meeting is added to your calendar. An email invitation is sent to everyone who's invited to the meeting.



Scheduling a meeting (cont)

Other calendars

1. In the space, click **Schedule**.



If your administrator has set up your account with the Calendar Service, here's where you'll find all the meetings that are scheduled in the space.

2. Click **Space** meeting information, select **Copy**, and then go to your calendar and paste the meeting information into a meeting.
Depending on your setup, the meeting information may include a link to join the meeting, Join by phone options, and a video address so people can join from any standards-based video system.
3. Go back to your Webex App and the **Space meeting information** view. Next to **People**, select **Copy**, and then go to your calendar and paste the email addresses in the **To** section of the meeting.
4. Specify the date, time, and other details, and then send the invite.



Standard user licence

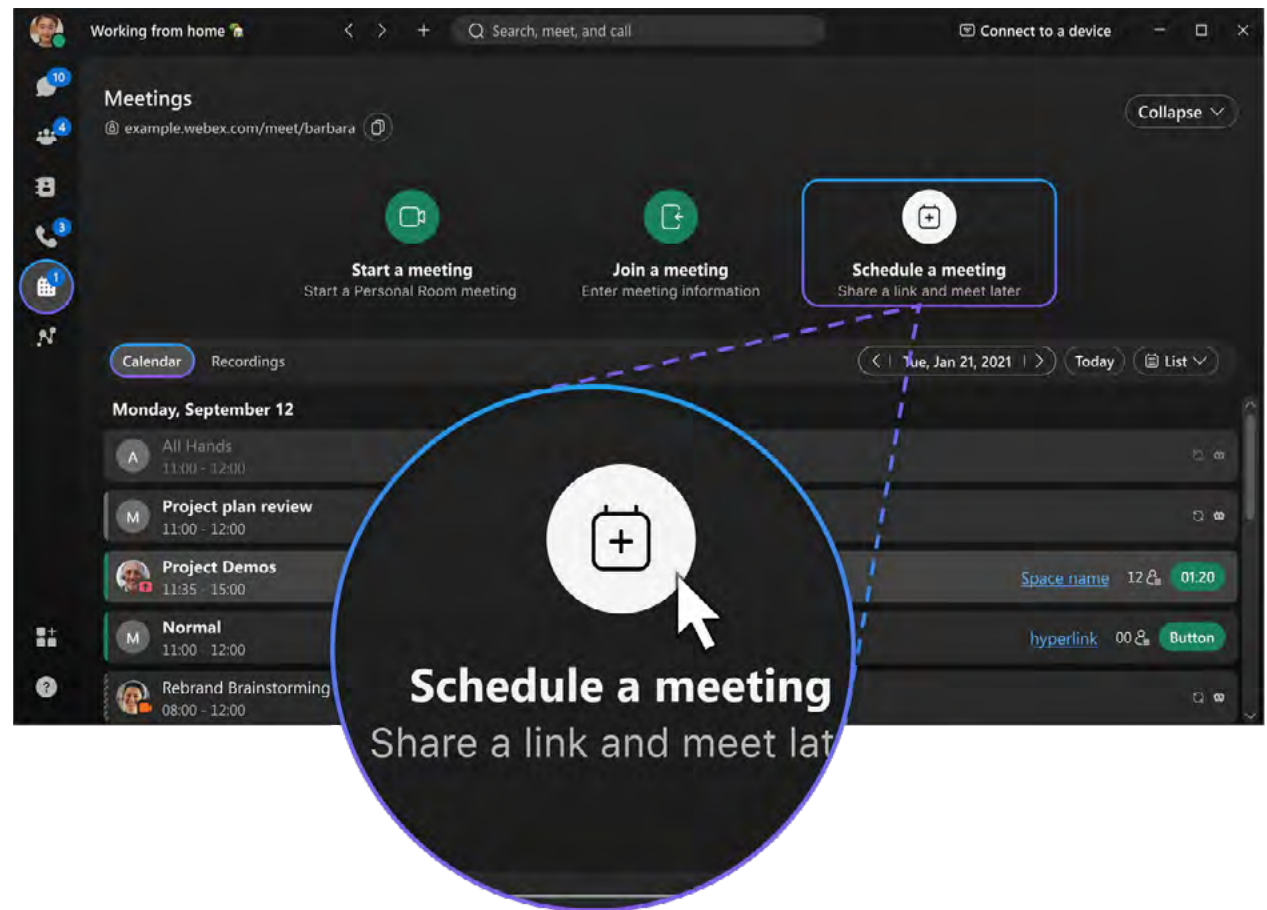
[Scheduling a meeting >](#)

[Find meeting and security
information in a meeting >](#)

Scheduling a meeting

You can schedule a meeting from the Meetings calendar when you want to schedule a future one-time or recurring meeting.

You or anyone you assign as a cohost can start the meeting, invite people to it, start breakout sessions, record the meeting, and share the recording.



Scheduling a meeting (cont)

Before you begin

1. Go to **Meetings**.
2. Click **Schedule a meeting**.



If you don't see **Schedule a meeting**, your account isn't set up to host meetings. You can schedule a meeting from a space instead.

If you're using Microsoft Outlook to schedule meetings, you schedule a Personal Room meeting. Webex App opens a new Outlook invite with all the meeting details. All you need to do is add the people you need to invite, select the date and time, and send the invite.

If you're using Google Calendar to schedule meetings, you schedule a Personal Room meeting. Webex App opens a Google calendar invite in a new tab in your default browser. All you need to do is add the people you need to invite, select the date and time, and send the invite.




3. If you're using the Webex App app scheduler to schedule meetings, edit the name of the meeting in **Topic**, and select the **Date and Time** for your meeting.

Choose whether you want to schedule a one-time meeting link or use your Personal Room. If you choose a one-time meeting link, change the password, if you want.

Optionally, add a **Description** of the meeting. It'll be included in the email invitation if your administrator has set up your account with Cisco Webex Hybrid Calendar Service.

4. Add **Invitees** by typing their name or email address.

When you start typing someone's name, Webex App provides suggestions for you. Choose a name from the list.

If your account has Calendar Service, initially, **Unknown availability**  shows beside each person's name. If the person is available at the time you selected, the symbol updates to **Available** . If the person is unavailable, the symbol updates to **Unavailable** . If we're unable to retrieve someone's availability, **Unknown availability** continues to show beside that person's name.



If invitees are unavailable, change the meeting time and their availability status updates, or click a time slot in the calendar on the right of the screen to see their availability.

5. (Optional) If you chose a one-time meeting link and have the full-featured meetings experience, click **Advanced Settings** to customise audio options, add a cohost, enable breakout sessions, and more.

For more information about these settings, see Advanced Scheduling Options. It describes all of the options available when you schedule a meeting from your Webex App site, including the subset of options available when you schedule a meeting in the Webex App app.

6. Click **Schedule**.

The meeting is added to your calendar. An email invitation is sent to everyone who's invited to the meeting.

Find meeting and security information in a meeting

When you're in a scheduled meeting, Personal Room meeting, or a meeting started in a space, you have access to meeting information. You can share that information with other people who may have missed the invite or are having trouble joining the meeting.

1. In a scheduled meeting, click **Meeting Info**.
2. The **Meeting Info** tab displays the following:
 - **Copy meeting information**
 - **General** tab
 - **Security** tab
3. In the **General** tab, you can share the meeting information in the following ways:
 - Click **Copy meeting link** to only copy the meeting link.
 - Right click the URL and click **Copy**.
4. The **Security** tab displays the security information and if your meeting is an encrypted meeting.
5. You can share the security information in the following ways:
 - Click the Security code to copy.
 - Communicate this code to all participants, either verbally or in a message outside of the app.



Getting work done with calling and scheduling

Starting and answering calls >

Starting meetings in a space >

Invite someone from within a call >

Co-create with whiteboarding and screen sharing >

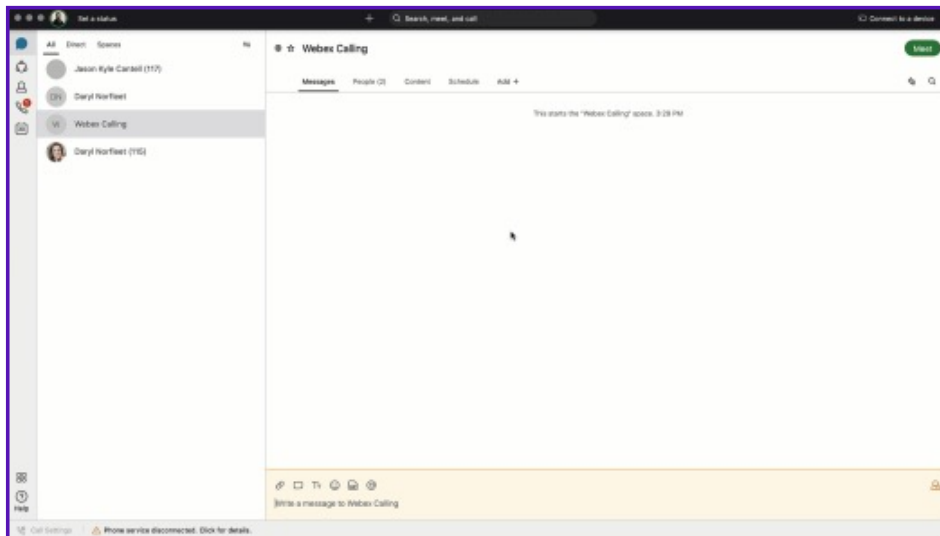
Share screen >

Starting and answering calls

You can start video and audio calls with individuals from 1:1 spaces.

Start a call

There are different ways to call in Webex. One easy way is to:



Step 1

Click the **Search** field.

Step 2

Start typing the name of the person or space you want to call.

Step 3

Click the name of the person or space in the results list.

Step 4

Click the **Audio Call** or **Video Call** icon at the top right of the space.

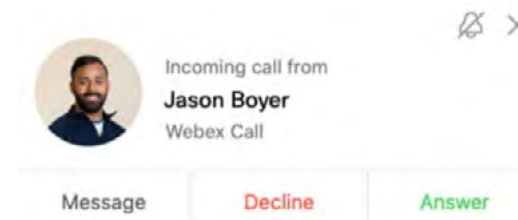
Answer a Call

When you receive a call, you'll see a notification allowing you to:

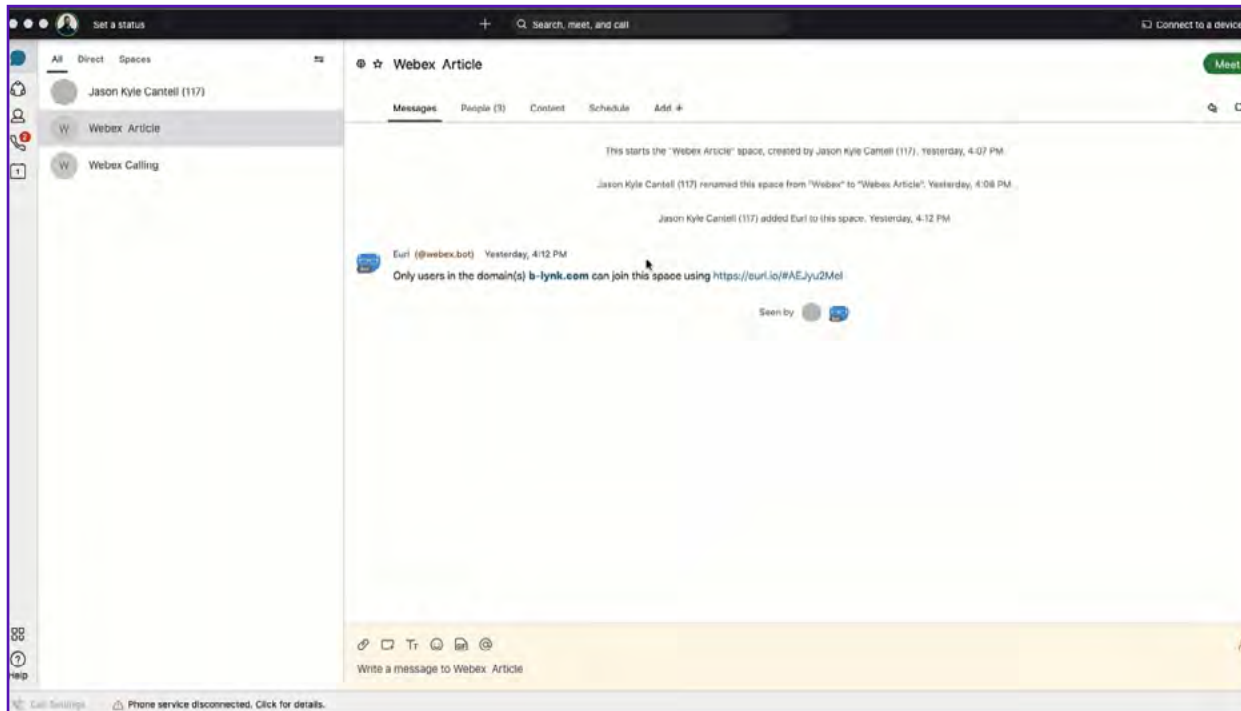
Answer: To take the call.

Decline: If you can't answer now.

Message: If you want to answer with a chat message instead.



Starting meetings in a space



You can start a meeting directly from a space. Need to escalate from messaging to a meeting? You can also initiate an ad-hoc meeting just by clicking **Meet** in your space.

Meet

All team members that have “Smart Notifications” set up will get a ping that their team is meeting!

And the green meet button will appear next to the space.

They only need to click to join in!


Tip

Any member of the space can start the meeting.

Invite someone from within a call

When a call is running in a space, you may wish to invite someone as a guest but not add them to the space. To do this when on the call:

Step 1

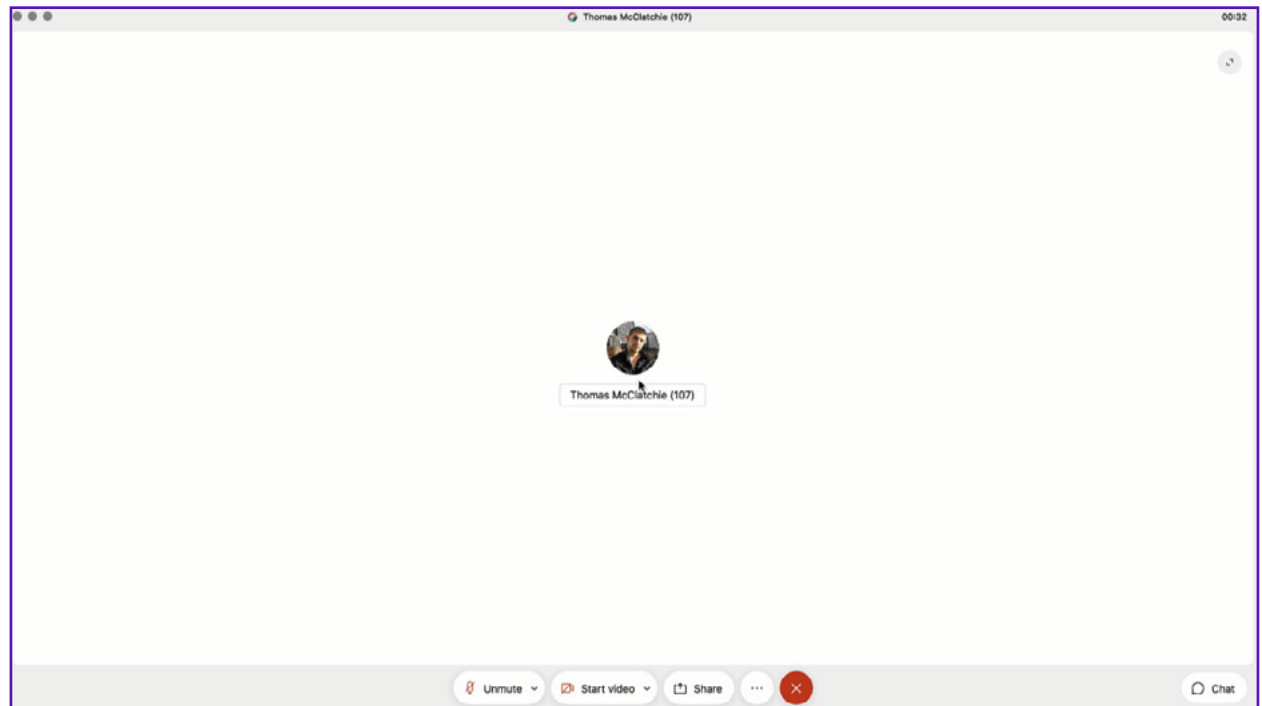
Click the  icon in the meeting window.

Step 2

Click **Invite guests to meeting**.

Step 3

Type the name of the person you want to invite or their email address.




Co-create with whiteboarding and screen sharing

Whiteboards are powerful and simple tools to convey visual ideas and brainstorm on projects. Within Webex you can share whiteboards both during and outside a meeting.

Within a meeting

Step 1

Click the  icon in the meeting window

Step 2

Click **New whiteboard**.

Step 3

Use the annotation tool to draw on the whiteboard. You can also continue an existing whiteboard previously shared in the space.



Outside a meeting

Step 1

Click the space where you want to share the whiteboard.

Step 2

Click the **Content** tab.

Step 3

Click **Whiteboards**.

Step 4

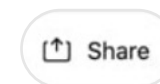
Click **New whiteboard**. Alternatively, you could reopen a whiteboard already shared in that space.

Step 5

Use the annotation tools to draw on the whiteboard.

Step 6

Click the **Share** icon.



Step 7

Click **Post snapshot** for your whiteboard to appear in the chat thread.

Share screen

In Webex you can share your screen with others, including streaming videos. Share your screen during a meeting or even in 1:1 spaces outside, of a call.

Step 1

Click the **Share screen** icon



Step 2

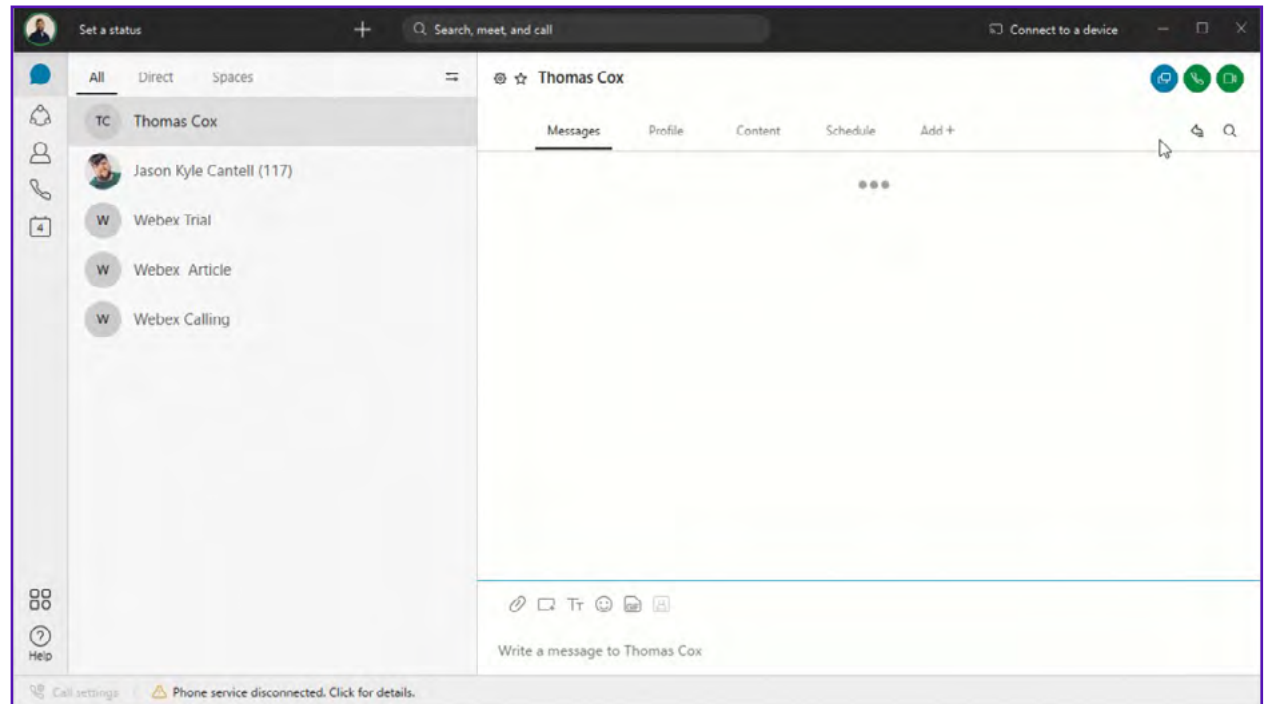
If you are planning to share a video, check **Share computer audio** and **Optimise for video** on top of the screen.

Step 3

Select the screen you want to show

Step 4

To stop, click **Stop** in the orange bar at the top



Be a Webex master

[Spaces tips and tricks >](#)

[Bots >](#)

Spaces tips and tricks

Add an external participant to a space

You are not limited to communicating with only your organization. Invite external contacts like vendors or customers to collaborate with you in spaces using their email. You can keep track of what spaces have external contacts by the icon in the lower right corner.



Add a space to your favourites list

You can be more engaged in some spaces than in others. To keep a closer eye on those spaces that truly matter, you can add them to your favourites list by clicking the star in front of the space name.

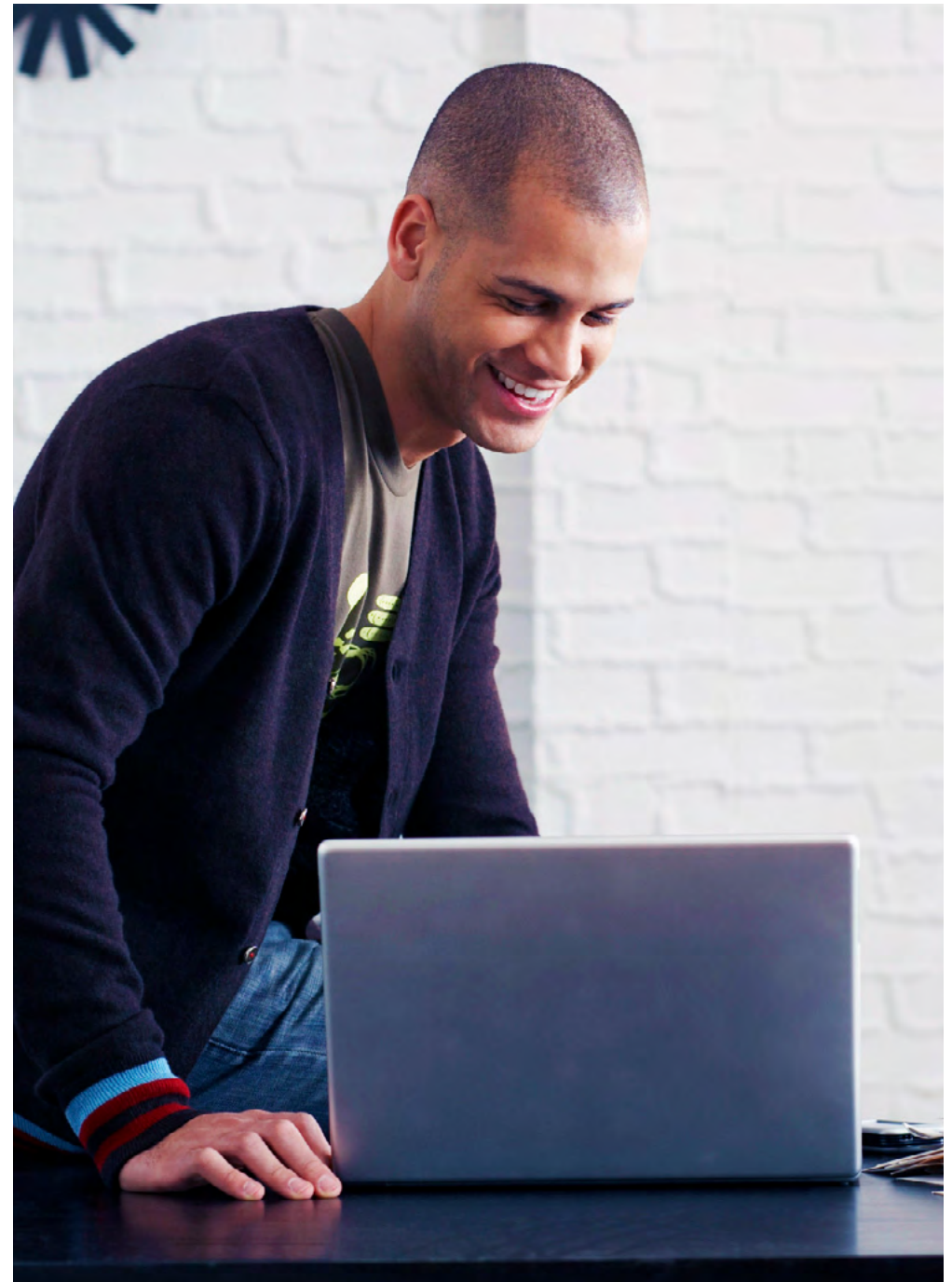
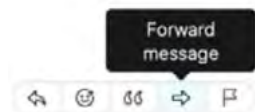


Add integrations to your space

You can see directly in the Webex space if someone added something new in your CRM, or updated specific documents in Dropbox. To get all the information you need in one place, jump to the Cisco Webex App Hub to check the available integrations.

Forward messages




Sometimes you see a message in one space and want to share it with people in another. You might be chatting directly with someone, but something comes up in that conversation that you'd like to discuss with others.





Check people status

Knowing if people are available is important when you need to communicate with them. With Webex, just use the **Search** field to find someone and hover over their picture to get more information.

Picture	Status
	Green border Active in the last 10 minutes.
	No border Active in the last 24 hours.
	Translucent profile picture Not active for more than 24 hours.
	Airplane The out of office reply is set in Microsoft Outlook.
	Moon Do not disturb.
	Video In a meeting or on a call. Can't be seen when using the mobile app.
	Sharing Sharing a screen or application. Can't be seen when using the mobile app.

Turn on announcement mode

What if you need to dispatch information to an audience without a long thread of reactions? Switch on **Announcement** mode so only the moderators can post in the space.

Step 1

Click the **Space Information** icon in front of the space name.

Step 2

Click **Moderate space**.

Step 3

Click **Moderate**.

Step 4

Click the **Space Information** icon in front of the space name.

Step 5

Click **Turn on announcement mode**.

Step 6

Click **OK**.

Bots

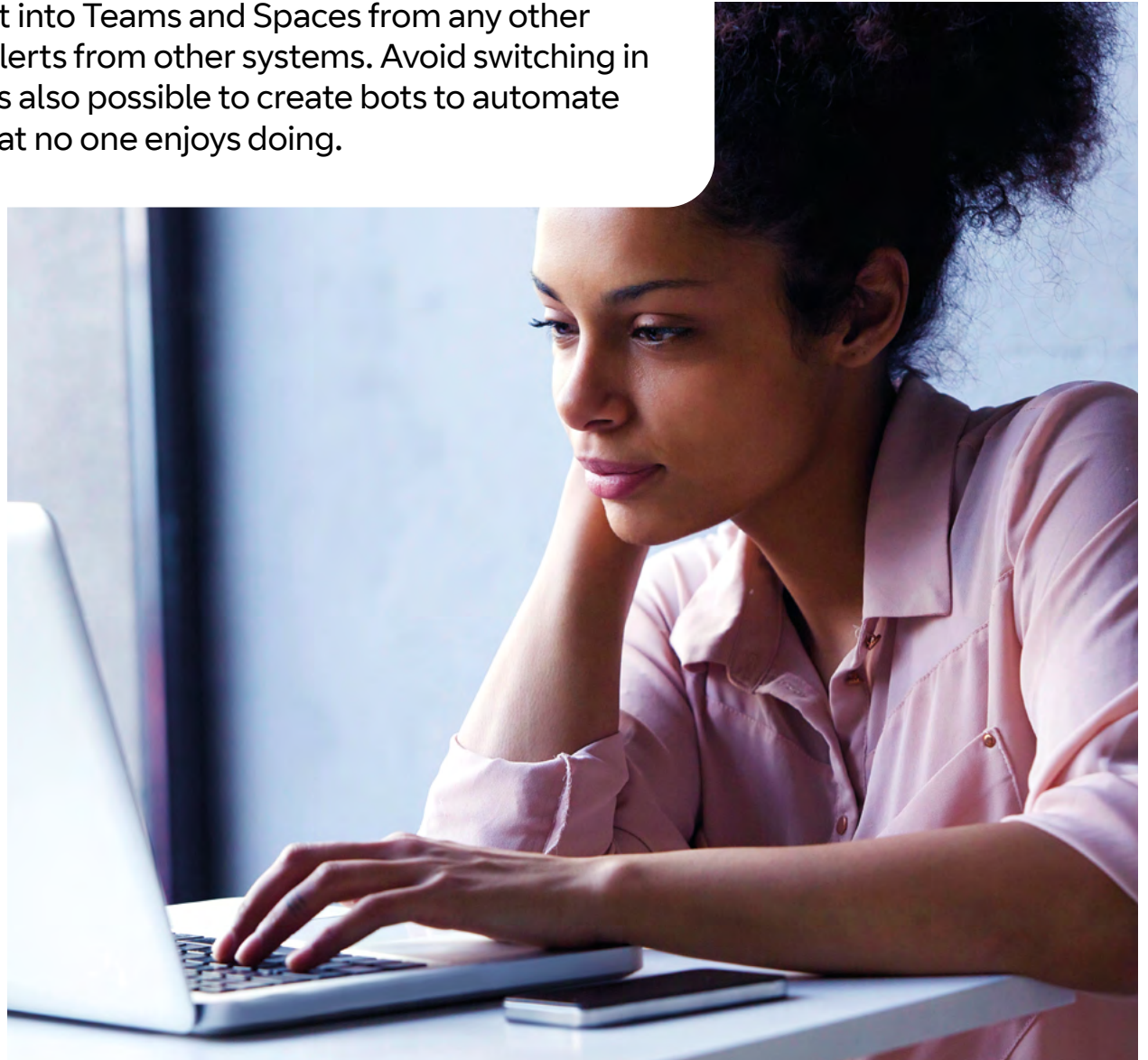
Cisco Webex makes it possible to bring content into Teams and Spaces from any other application. Access business information and alerts from other systems. Avoid switching in and out of different apps to get information. It's also possible to create bots to automate repetitive, high-volume business processes, that no one enjoys doing.

Bots

A bot is a simple way for users to use natural language to request automated tasks to be completed on another platform.

In Webex, a bot is a member of a Space just like any other real person. The possibilities of bots are endless. They can be as simple as getting weather updates where you live, or as complex as booking a meeting room or a flight.

Jump to [Cisco Webex App Hub](#) to browse integrations available for popular business applications and also some that third-party developers have built that could be useful to your organization.



Any further questions?

If you have questions we have not answered, please contact your BT account manager as your first point of contact. If you need any changes or clarifications on this document, please contact Paul Enright at paul.enright@bt.com

Visit: btwholesale.com/ciscowebex

Offices Worldwide

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April 2022

