Webex Teams

Reference Guide

CONTENTS

GETTING STARTED

Step 1   Navigate to https://teams.webex.com

                Note: Internet Explorer is NOT compatible!

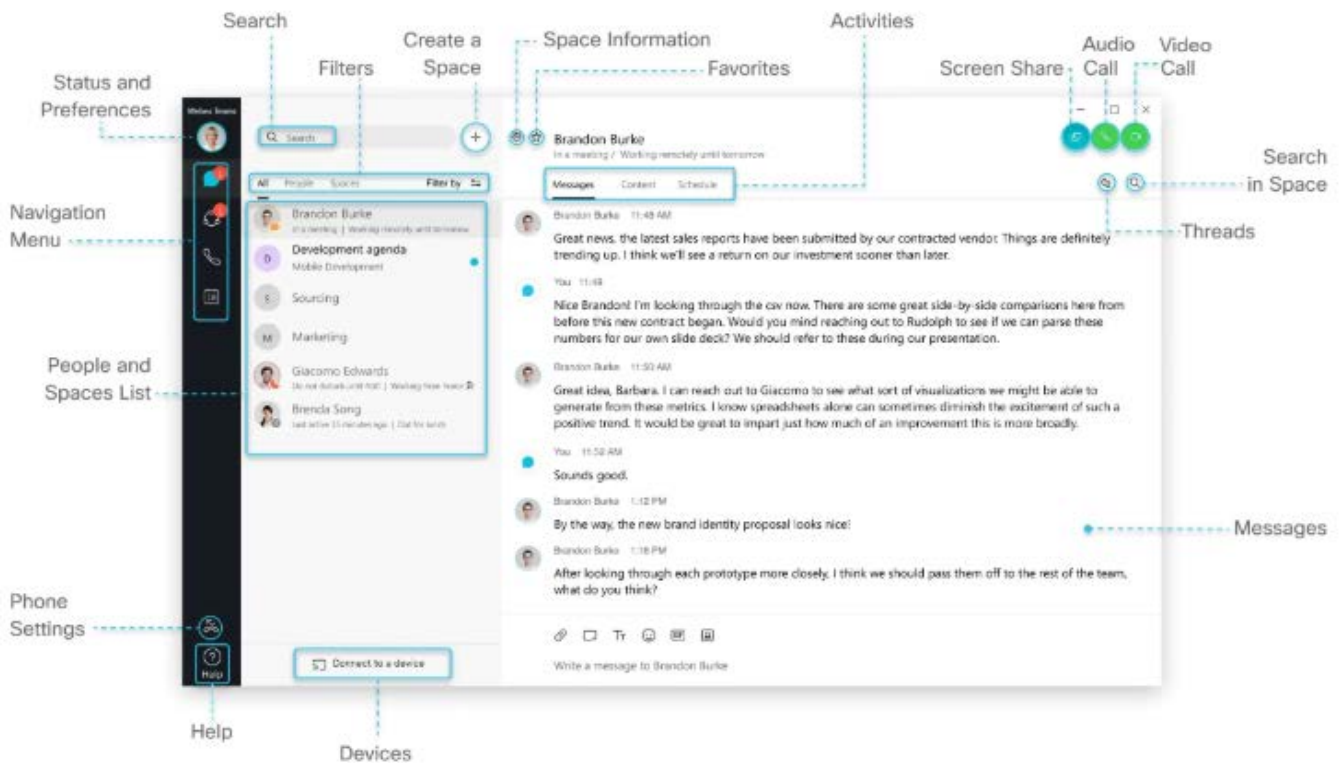Step 2   Enter your current Webex credentials to log in

Enter your email address
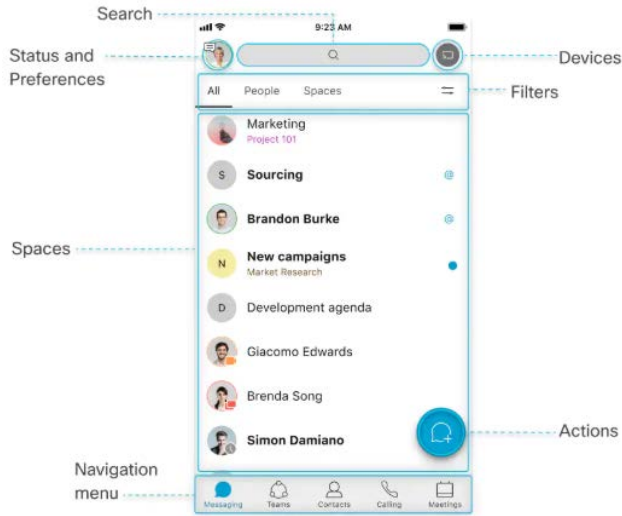
| Email address |

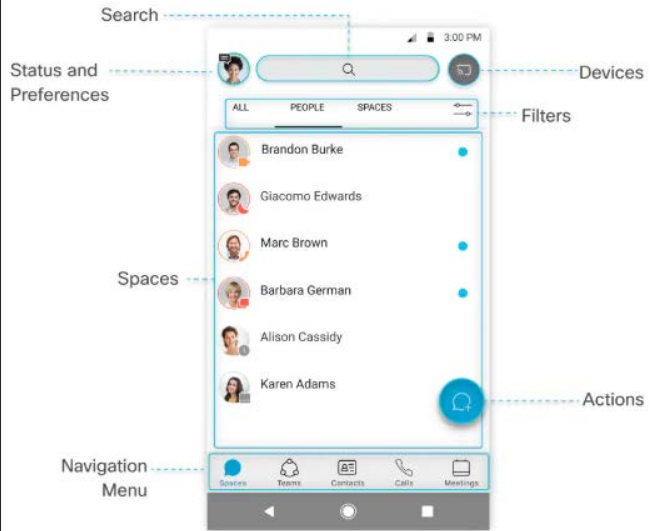| Next |

NAVIGATING THE APP (QUICK TOUR)

For Windows or Mac:

For iPhone:

Search
Status and Preferences
Devices
Filters

All People Spaces

Marketing
Project 101

S Sourcing @

Brandon Burke @

N New campaigns
Market Research

D Development agenda

Giacomo Edwards

Brenda Song

Simon Damiano

Spaces
Actions
Navigation menu

Messaging Teams Contacts Calling Meetings

For Android:

Search
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Devices
Filters

ALL PEOPLE SPACES

Brandon Burke

Giacomo Edwards

Marc Brown

Barbara German

Alison Cassidy

Karen Adams

Spaces
Actions
Navigation Menu

Spaces Teams Contacts Calls Meetings

Web App:

Search and Filters
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Spaces

Webex Teams
Secure | https://teams.webex.com

Brandon Seeger ▾
Active

D Development ag... 5   00:26

Data Visualizations
Engineering

M Marketing

Giacomo Edwards

Brenda Song

Brandon Burke

Maria Rossi

U Usage Analytics
Marketing

C Customer Feedback
Success Metrics

Brandon Burke 10:00 AM
I'm still working on that :)

You 10:46 AM
Great, no rush, much appreciated.

Brandon Burke 10:42 AM
Oh yea, by the way:

Brandon Burke 10:44 AM
Do we have examples of the new sale's report for the seminar?

You 12:45 PM
Yes. I gathered feedback from everyone else also, so I think we have a pretty complete picture to share with the others.

Brandon Burke 12:46 PM
Ok, sounds great! Thanks a bunch for getting all of that valuable information together. I'm actually on my phone right now, but send over the file in our space when you can. I'll download it soon.

Brandon Burke 1:08 PM
Looking forward to sharing our findings.

Connect to a device

Write a message to Brandon Burke

Help
Devices
Messages
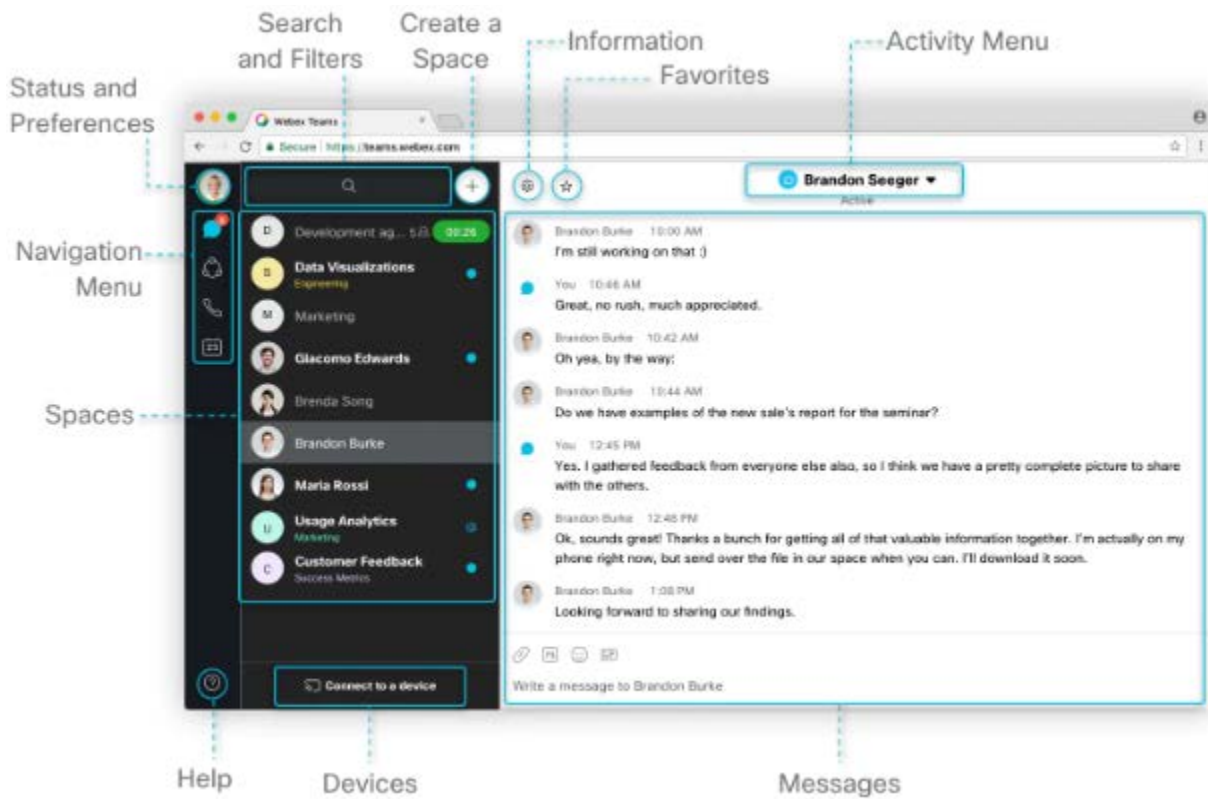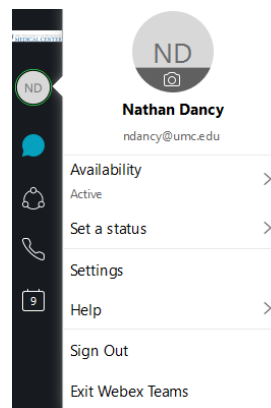
SETTING A PROFILE PICTURE

Click on your initials in the upper, left-hand corner. Then, click on your initials in the window that opens. Select the picture you want and change the email address just under the profile picture in order to display your name only.

NOTIFICATIONS

To manage your Notifications, your Camera, and your Audio settings, click on your profile picture and select **SETTINGS**.

- For Notificiations: Click on **Notifications**, select the notifications for your Spaces, scheduled Meetings, and Calls. Choose your notification sounds or mute and click **Save**.

CHECKING YOUR CAMERA
- For Camera: Click **Video,** select your webcam from the drop-down list, and click **Save**.

CHECKING YOUR AUDIO
- For Audio: Click **Audio**, select which device will be used for the microphone, speaker, and ringer, and click **Save**.

CHANGING THEME COLORS
- For Theme Colors: Click **Appearance**, select the theme that works best for you, and click **Save**.

DIFFERENCES

Team

A Team is a group of people who are connecting for a longer-term community, larger project or business goal. 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 within the Team.
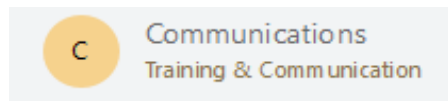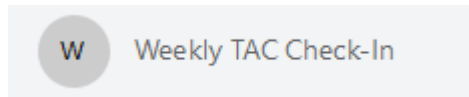
Spaces

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 are a 1:1 conversation. A Space can either be standalone or with a Team. They can grow or shrink as needed.

HOW TO IDENTIFY PERSONAL, GROUP AND TEAM SPACES

Once you have several different types of Spaces in use, they may be difficult to differentiate.

- **Personal Spaces**: They are always named for the individual that you are communicating with and the icon is that person's chosen picture or initials.

  JO — Jessica Green Overby

- **Group Spaces**: These Spaces are named with only a single line of text and the icon is typically the first word of the Space name.

  W — Weekly TAC Check-In

- **Team Spaces**: Spaces within Teams are indicated with 2 lines of text – the Space name is on the top line and the Team name is below that.

  C — Communications
  Training & Communication

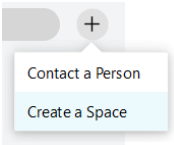|	Typical Activity/Purpose	Typical Duration	How to retire	Relationship	Do you need to control access?
Team	Distributed and Diverse	Mid to long-term	Space moderators can archive Teams, but not delete them	Teams have a permanent Spaced named "General" and any number of additional Spaces added by members	The Team creator is automatically made a moderator. Any Team member can create a Space within a Team. Moderators control membership, assigning others as moderators and controlling Team settings.
Space	Focused and Specific	Short to mid-term	If everyone chooses to leave a Space, it is deleted	A Space may be standalone or within a Team	By default, all members can invite others and change Space settings. Moderation can be switched on to control membership and settings.

CREATING A TEAM

In Webex Teams, creating Teams allows you to keep everything organized by categorizing multiple Spaces under a common theme.

1. Click the Teams icon from the Navigation menu.
2. Choose **New Team**, name the Team, then click **Create Team**.
3. Select the new Team, click **Team Members**, and **Add Team Members**.
4. Enter the name or email address and choose from a drop-down menu. People get added to the General Space automatically, but they can join any Team Spaces on their own.
5. To create more Spaces for any Team, click **New Space**, and enter a Space name.

CREATING A SPACE

With Cisco Webex Teams, you can interact 1:1 or you can collaborate with a group of people using Spaces.

1. Click the + sign next to the **Search** bar.
2. Click **Create a Space**.

   Contact a Person
   Create a Space

3. Type a name for your Space.
4. Enter the names of the people you want to invite. You can type either a name or email address and choose from a drop-down menu.

5. Click **Create**.
   a. You can create a 1:1 Space with a co-worker or client to have conversations, meetings, and share files anytime.
   b. Creating 1:Many Spaces allows for file sharing, chatting, and meetings with your Team to keep a project moving forward.

ROLES OF SPACE MEMBERS

ROLE	EXPLANATION
Space Moderator	Can add or remove people, edit space information, make other people moderators delete other people's messages. Moderators can also remove other peoples' ability to add or remove people. Spaces do not have a moderator until this role is assigned.
Space Member	In an unmoderated space, space members all have the same privileges. You can add or remove people and change the space name.
External Participant	You can participate in a space even if you're not part of the same company. As an external participant though, you won't be able to see or join other spaces. You can participate fully as a member of the space, sharing your expertise on one aspect of a larger project.
Team Moderator	If you created the team, you are the team's moderator. You have all the same privileges as a space moderator, and you can control which spaces are available and who belongs to them. When you add people to the team, they are automatically added to your team's General space. You can also make other people on the team moderators so they can share these responsibilities with you. So, even if you haven't created the team, you might still be a moderator.
Team Member	If a moderator adds you to the team, you are automatically added to the General space. After you become a team member, you can join other team spaces. You can also add other people as a guest to a space within a team. Only the moderator can add new people to the team.
Team Guest	If someone adds you to a team space without adding you to the team, you become a guest in that space. As a guest, you won't be able to see or join other spaces in the team. But you can participate fully as a member of the space, sharing your expertise on one aspect of a larger project.

START COMMUNICATING

Webex Teams is a wonderful communication tool that allows users to chat, share files, react with emojis and GIFs, screen share, meet with multiple team members, collaborate, share ideas through whiteboards. Think of a way to communicate without being in the same location and Webex Teams offers that possibility!

CREATING & SENDING MESSAGES

When you first start a message in any Space, you will see this menu above the text entry field:
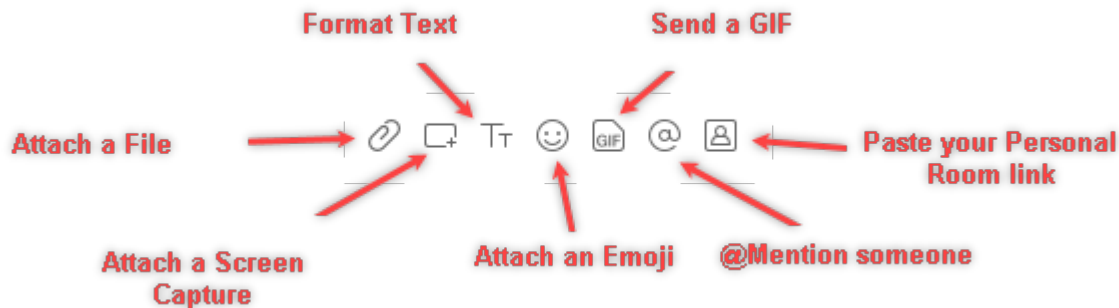

- **Attachments**: The maximum size limit for attaching is 2 GB. You can preview files without downloading if they are less than 200 MB
- **Screen Capture**: Once you click the Screen Capture icon, your mouse will turn into a plus sign. Click and drag your mouse pointer to select the area that you want to send. When you release the mouse button, the selected area will be inserted into the text field. To send, press **Ente**r on your keyboard.
- **Format Text**: You can reformat basic text by clicking this icon. You can choose bold, italic or underlined options. You can also add bullet points and/or numbered lists. There are also 3 heading styles to choose from. There is another feature called Markdown that you can enable that allows for more formatting options. Pressing **Ente**r will send the message immediately. If you would like to start a new line, press **Shift + Enter** to start a new line of text.
- **Adding Emojis**: Clicking this icon pops up a menu to choose from a large display of emoji icons.
- **Sending GIFs**: Clicking this icon pops up a menu to search and choose from several preloaded GIF files.
- **@Mentions**: You can alert a particular person in a Space with this feature. Type your message and at the end type the @ symbol. Once you type the @ symbol, a menu of people will pop up. You can begin typing the letters of the person's name to narrow the list. You can select an individual or us the "@all" mention to tag everyone in a Space.
- **Personal Room link**: Clicking this icon will immediately paste your Personal Room link in the text field. Send by pressing **Ente**r.
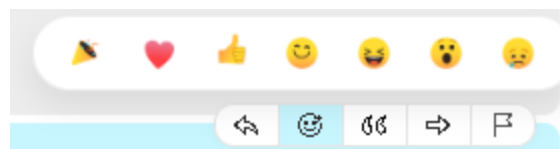
EXISTING MESSAGES

Once messages have been posted in a Space, either by you or someone else, you will see the menu below as you hover your pointer over the message:
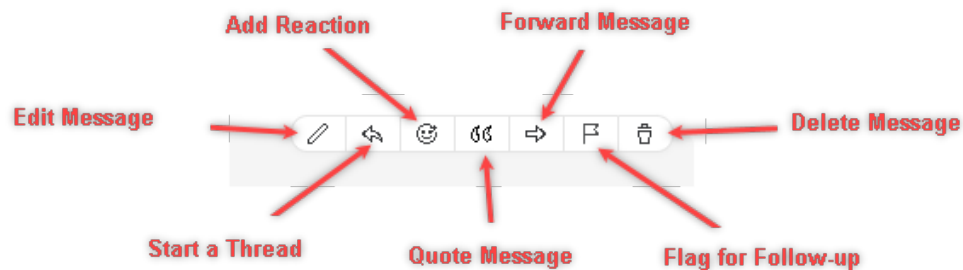

- **Edit Message:** You can edit your own messages by clicking the Edit Message icon on the far left of the menu. NOTE: You are only able to edit text-only messages. Screen Captures, Emojis and GIFs are not editable. Also, you cannot edit messages from others. That menu (pictured below) is more limited (Thread, Reaction, Quote, Forward and Flag).
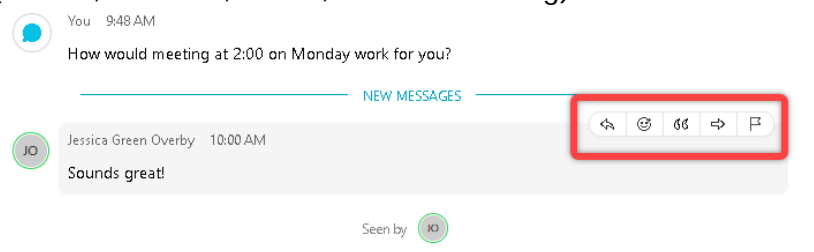
- **Threads:** Threading allows users to reply directly to specific messages in order for a conversation to remain inline and on topic and not appear random and out of place. After a Thread is started, users in the Space can Reply to Thread as well.
- **Reactions:** Respond to messages with 7 different Reaction icons.

- **Quoting Messages:**
  You can reference a specific part of a larger conversation without creating a separate Thread by Quoting. To Quote, hover over the part of the message you wish to quote, select the quote icon. This will copy the portion of the message and display it in quote format. Then, you can reply as you would to any message.

- **Forwarding Messages:** If you would like to Forward a message from one Space to another, hover over the message, click on the Forward Message icon, and then you will enter the Name of the Space you want to send it to. You can also create a new Space to forward to.

- **Flagging Messages:** Messages can be Flagged for easier tracking and retrieval.
- **Deleting Messages:** Users are also allowed to Delete their own messages but not messages sent by other users.
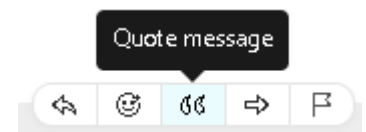
SORTING

To help zoom in on priority items and avoid information overload, simply click the **Filter by** tab underneath the **Search** field and use one of the following options:

- **Notifications** – shows a list of all Spaces where you have notifications selected and something new happened
- **Unread** – shows all unread messages
- **People** – shows a list of all people you've collaborated with in order of the last contact
- **Favorites** – shows a list of all spaces you marked as a favorite by clicking the star on the top left corner of a Space
- **@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
- **Flag** – shows a list of all messages you've flagged (every message can be flagged for action later by clicking its flag icon)
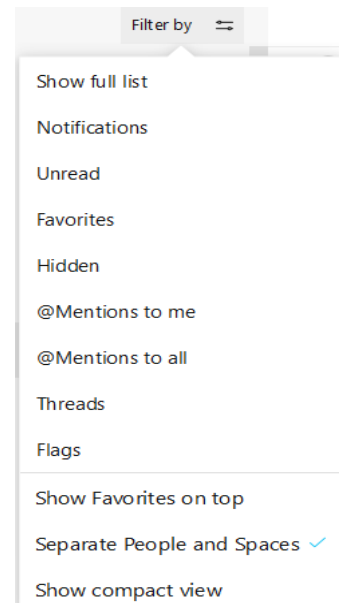
SEARCHING

There are also advanced search features that help to easily rediscover people, Spaces, messages, and files.

- Start typing the person, document name, or keywords from a chat in the **Search** field.

- If you are looking for a person or Space, results will appear below. If you are looking for a chat message or file, select the **Messages** or **Files** tab directly under the Search field.

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

  - **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
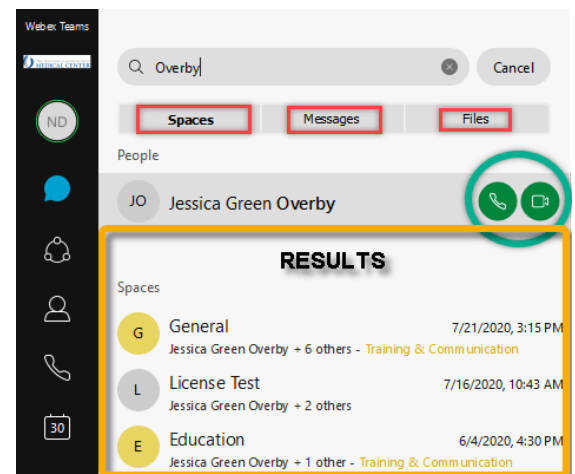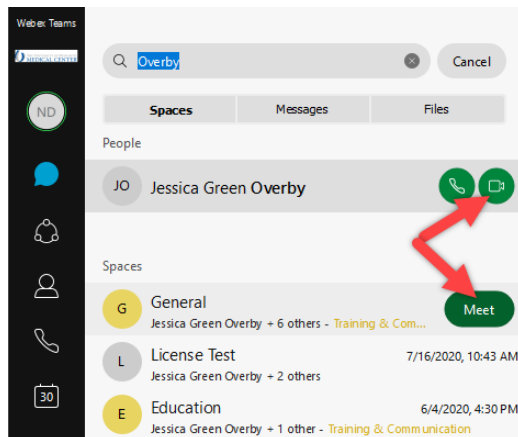
CALLING

START A CALL

You can start video and audio calls with individuals from 1:1 Spaces. This can be done many ways but the simplest is to start by entering the person's name in the **Search** field, then selecting that person or

Space (if you already have a 1:1 Space created between you). Next, click the **Call** icon at the top right of the Space.
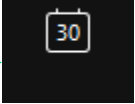

ANSWER A CALL

When you receive a call, you'll see the following notification pop up on your screen, typically in the lower, right-hand corner of the screen:
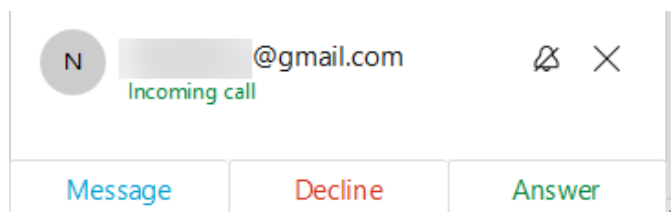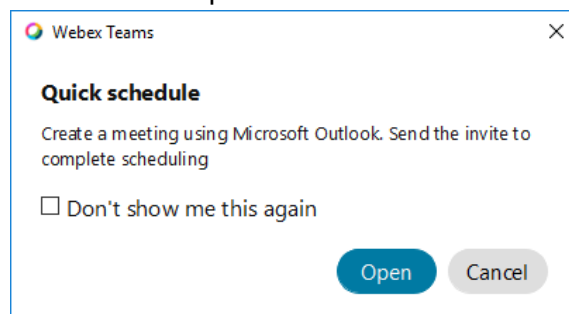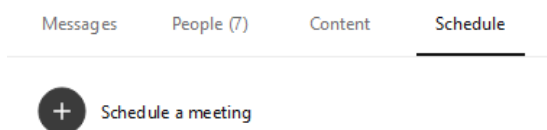

MEETINGS

SCHEDULING

To schedule a meeting directly from a Space:

- Click the Activity Menu > **Schedule** > **Schedule a Meeting** > **Open** (this will open an invitation in your calendar app.
- Enter the meeting title, date, and time then click **Send**.
  - o Note: any member of a Space can start a meeting!
- Click the **Schedule** tab underneath the **Search** field, then click the + to open a Quick Schedule launcher with Outlook.

If your administrator has set up the Cisco Hybrid Calendar Service, you can set up meetings in Teams through your calendar app.

INVITING

To invite someone to a call, click the ⋯ icon from the tools in the meeting window, then click **Add Guest**. You'll then be prompted to enter the name or email address of the person you want to invite. Note: Guests will have to be let in by someone who is already in the Space/Call.

To invite someone to a Space, click on the **People** tab then click the ➕ and begin typing their name or email address. Teams will automatically populate a list based on what you enter, then you can select the person you wish to invite.

WHITEBOARDS

Whiteboards are powerful and simple tools to convey visual ideas and brainstorm on projects. Within Webex Teams, you can share whiteboards both during and outside of meetings. Whiteboards can be shared outside of the Space that they were created by clicking the **Share** icon while viewing it, then navigating to the Space you want to share the whiteboard in and clicking **Post Snapshot** to post it in the chat thread.
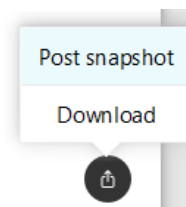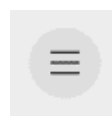

WITHIN A MEETING

Click the ⋯ icon in the meeting window, then select **New Whiteboard**.

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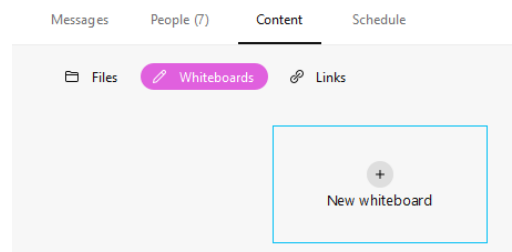

To navigate back to a Space from a whiteboard, click on the ☰ icon in the upper right-hand corner of the screen.

OUTSIDE OF A MEETING

You can also start a whiteboard by clicking on a Space, then selecting the **Content** tab like pictured here:

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

SCREEN SHARING

In Webex Teams, you can share your screen with others, including streaming videos.

- In a call or meeting, click the **Share Screen** icon (if you are planning to share a video, check **Share computer audio** and **Optimize audio** on the top of the screen).
- Select the screen you want to share
- Click **Stop** in the orange bar to stop sharing

NOTE: You can also Screen share in 1:1 Spaces outside of a call by clicking the screen share icon in the upper right-hand corner of the Space

ADVANCED FEATURES

Once you feel comfortable with the basic functionalities of Webex Teams, try some of these features and become a Webex Teams Master!

DEVICES

JOINING A MEETING USING A CISCO VIDEO DEVICE
- Join the meeting from your computer
- Click **More options**
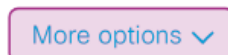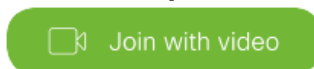
- Select the Webex device you want to use (such as built in room devices)
- Click **Join with video** button.

SWITCHING FROM MOBILE TO A WEBEX DEVICE
Should you happen to find yourself running late for a meeting, don't miss a minute by joining from your mobile device. Once you've entered a conference room or office with a Webex device, you can easily switch the device without leaving the meeting.

- Click the ⋯ icon > tap **Move Call >** tap the device you want to use (only cloud-connected devices will be detected) > tap **Move**.

ADDING A SPACE TO YOUR FAVORITES 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 favorites list by clicking the star in front of the Space name.
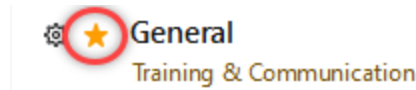
PEEKING INTO A SPACE

If you have an active Space that you wish to look at but not mark messages as read, you can use the Peek feature.

- Right-click on the Space that you wish to Peek in and select **Peek in Space**. Note: The space must have unread messages for this feature to work.
- You will be able to view the Space contents without showing Read status in the message window.
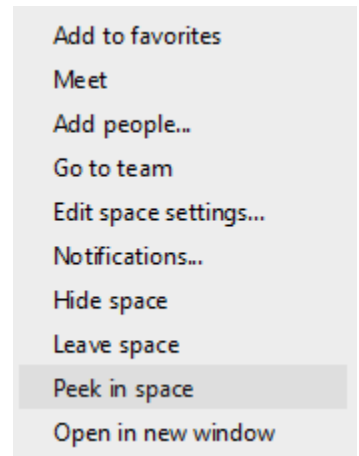
ADDING EXTERNAL PARTICIPANTS

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 lower right corner.

Note: External users must already have a Webex Teams account before you can invite them to join Spaces

## ADDING INTEGRATIONS TO YOUR SPACE

There are many apps available that integrate into Webex Teams. To browse these available apps, click the **Settings** icon beside a Space name and click **Add Apps**.
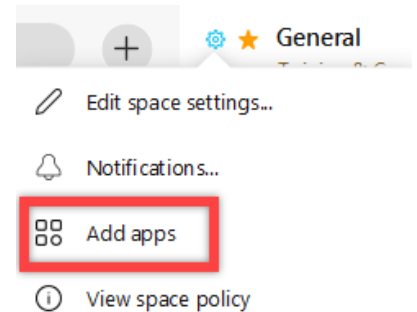
This will open a browser tab and navigate you to the Webex AppHub where you can browse and search apps that have integration capabilities for a specific tool that can enhance your Space.

STATUS ICONS

You can set a Status icon for yourself by clicking on your profile circle, then clicking **Set Status**.
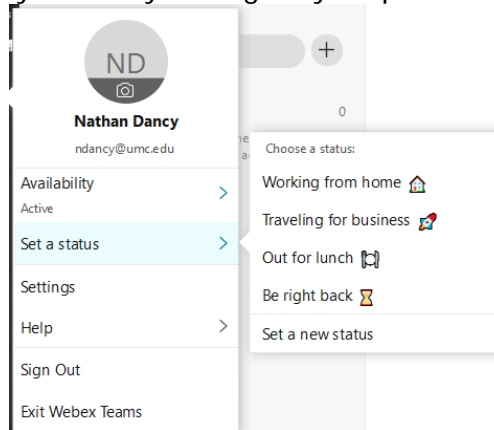
ANNOUNCEMENT MODE

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

- Click the **Settings** icon to the left of the Space name, then scroll down to **Turn On Announcement Mode** and select; confirm by clicking **OK.**
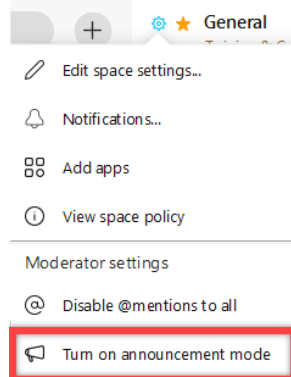
IN-MEETING TIPS & TRICKS

SEPARATING THE TEAMS APP AND THE MEETING WINDOW

When attending a meeting in Webex Teams, the meeting window appears integrated within the chat window. If you prefer to have 2 distinct windows and pop up the meeting window separately, just click the **Undock video** icon in the top right.
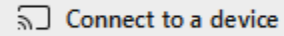
LOCKING YOUR MEETING

Anyone with the meeting link can enter your meeting unless you lock the meeting. Uninvited people will be placed in a lobby where you can decide whether or not to let them in. To lock a meeting:

- Click the ⋯ icon > Select **Lock Meeting** 🔑

SHARE CONTENT WIRELESSLY

You can use Webex Teams as a wireless projector when you want everybody in the room to see what you are sharing, directly on the connected Webex device.

- Search or click the device in the lower, left-hand corner
- Click **Share** once a connection is established