



Webex: The essentials



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telecom

We've got you

- Learning how to navigate a new app can be tricky. We'll show you everything you need to know about using Cisco Webex.
- Do you manage projects, people, sales, customers, or technical tickets? Do you need to communicate more effectively with colleagues or students?
- This essential guide will show you how easily Webex can fit into your workday by streamlining messaging, meetings, whiteboards, and file sharing all in one app.

Here's what's included

- Overview of Webex
- Who can use Webex
- How to quickly install and customize the tool
- How to use messaging, searching, meetings
- How to seamlessly use a video device with Webex
- Useful links and handy tips

Webex works for all types of teams

The growing team

- 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.

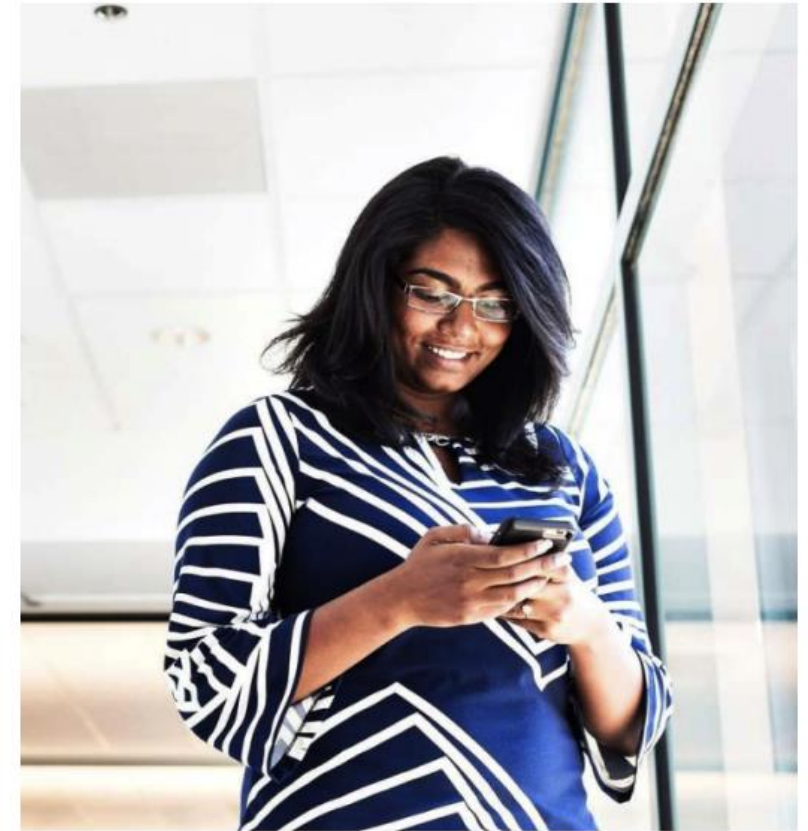
Webex matches all teams' working styles

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

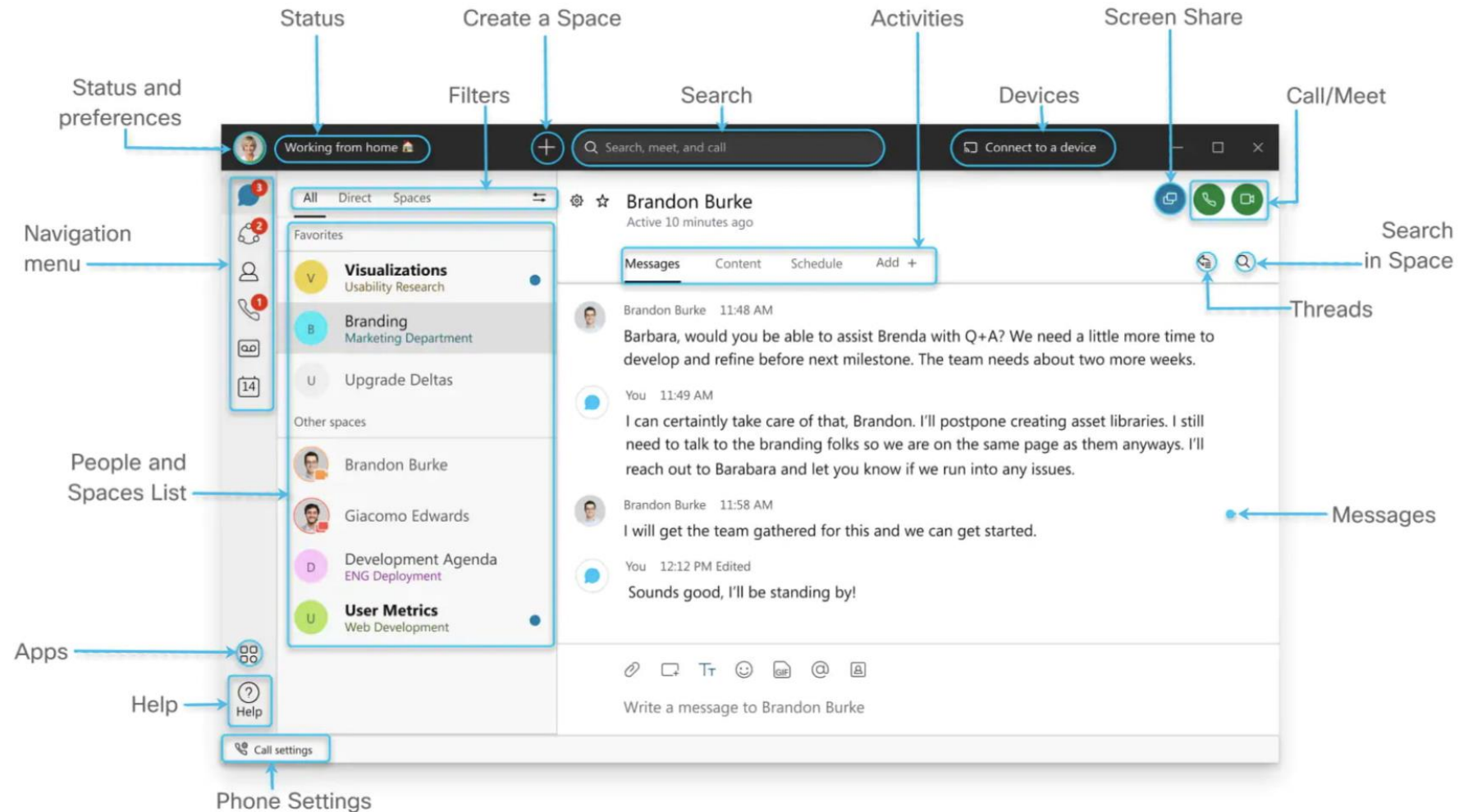
- Task-oriented and deadline-driven. Great team coordination is necessary as well as regular sync-up to measure progress and discuss tasks.
- Clear audio and video meetings for sharing content and making decisions.
- Collaborate with external vendors, partners, and suppliers.
- Always be available for your stakeholders from your mobile device.



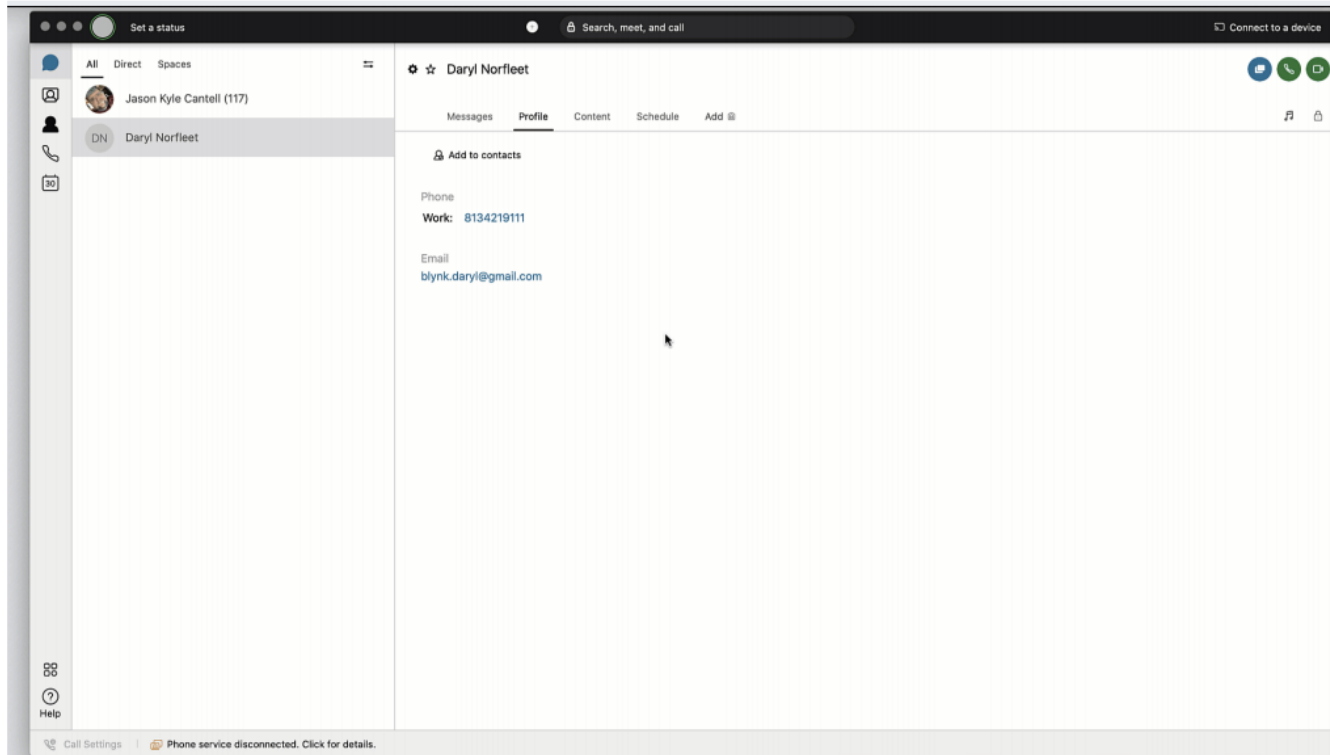
Getting started



Get to know Webex



Customize 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 customize even 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 organized 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

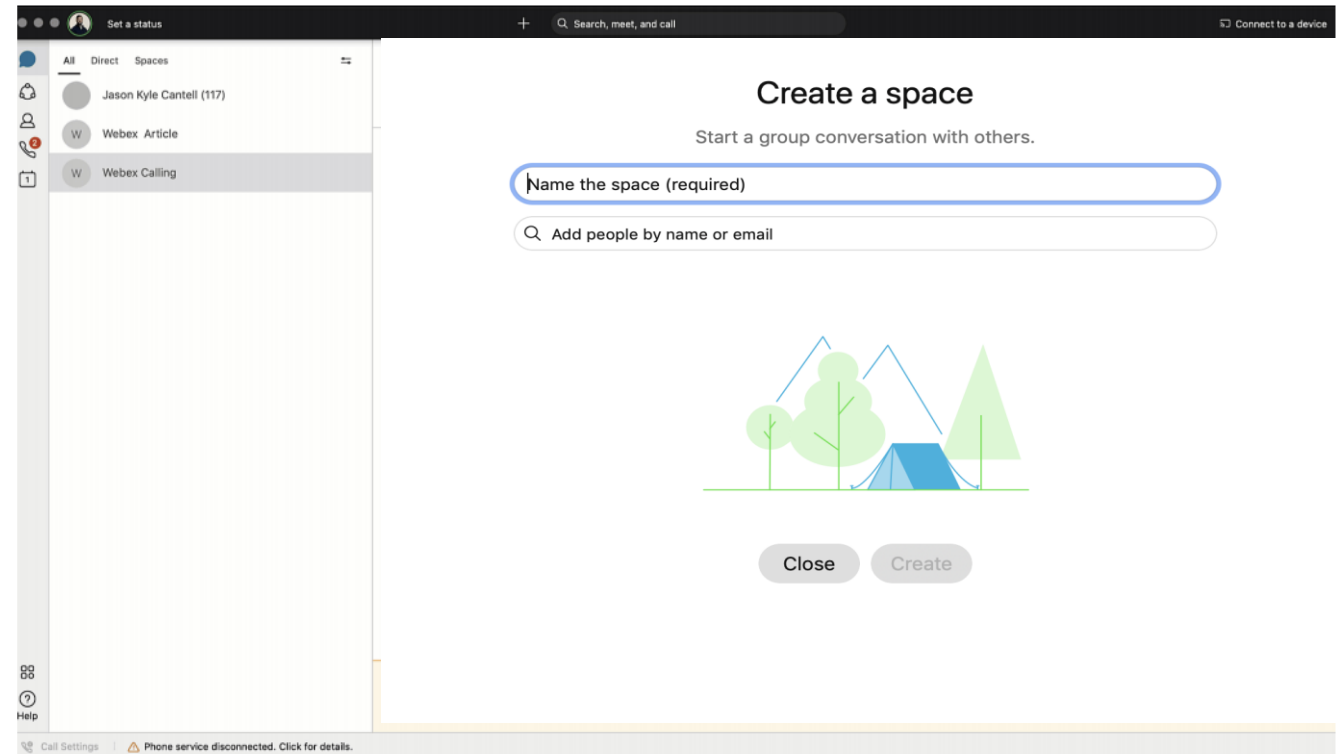
Type a name for your space.

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

@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



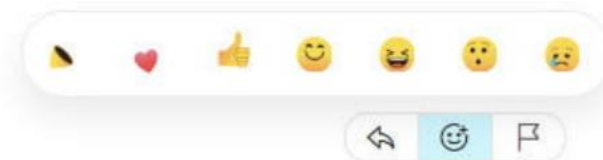
Send someone a message

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.

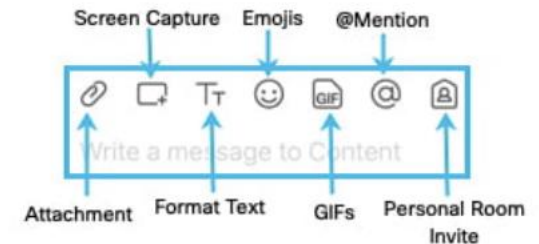
React to messages

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.



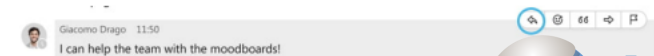
Give your message some personality

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



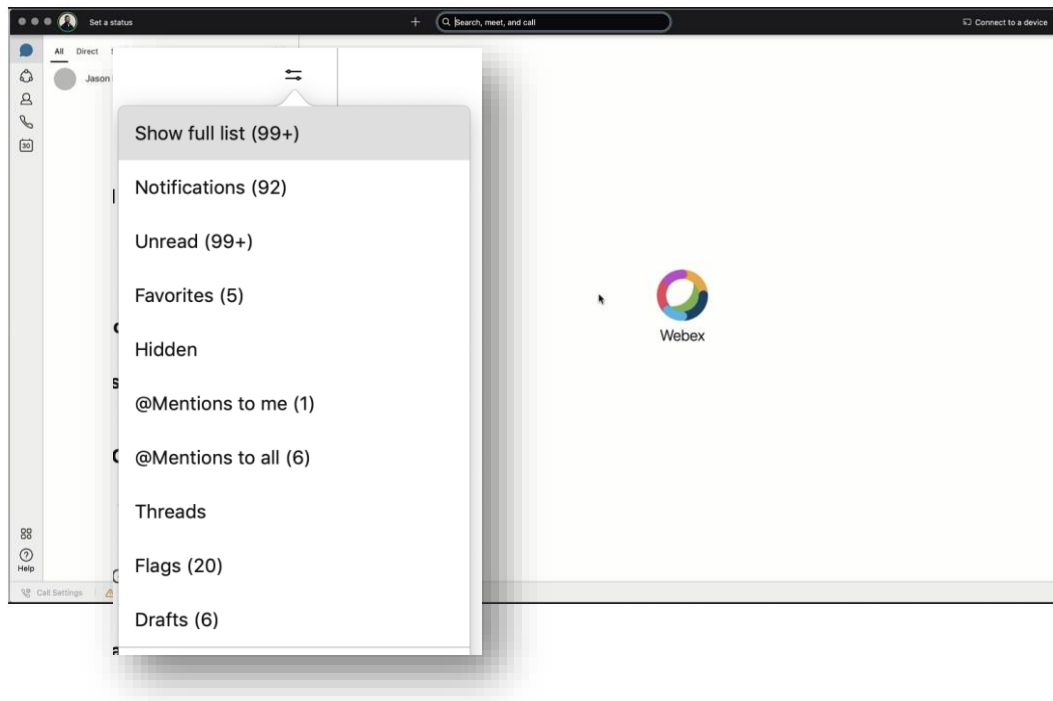
Answer a specific message in a thread

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 favorites.

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.

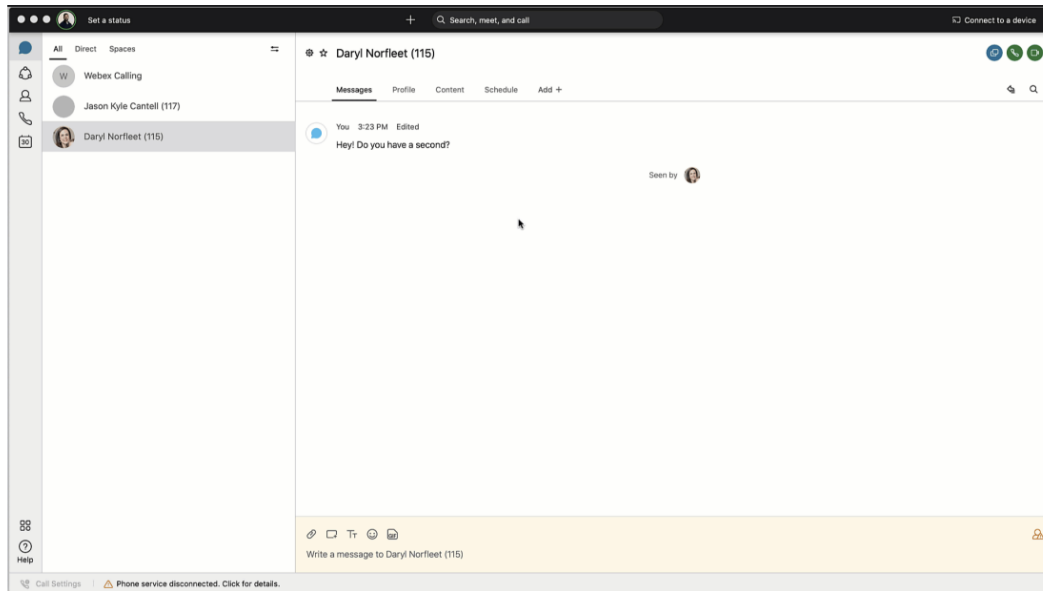
Threads: Shows a list of threads within chats and spaces.

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.

Getting work done
with calling and
scheduling

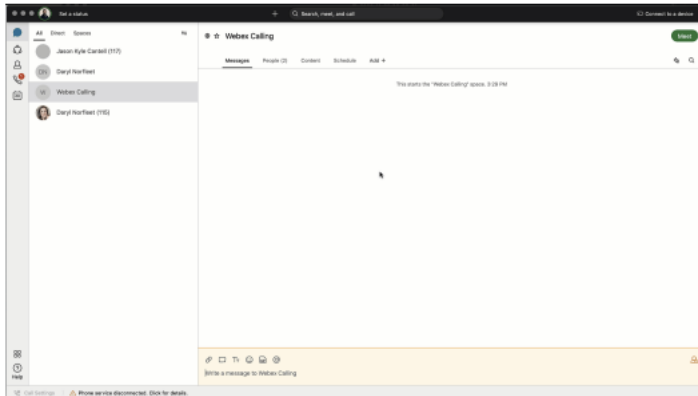


Starting and answering calls

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

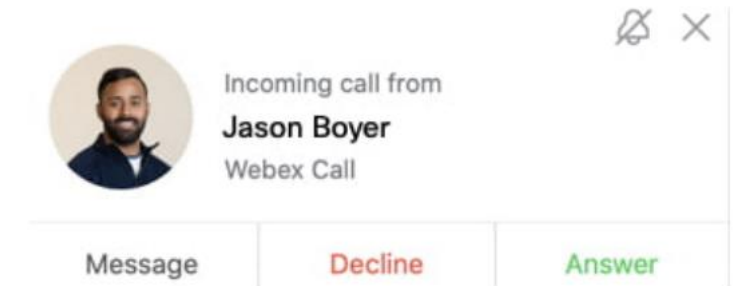
Start typing the name of the person or space you want to call.

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.



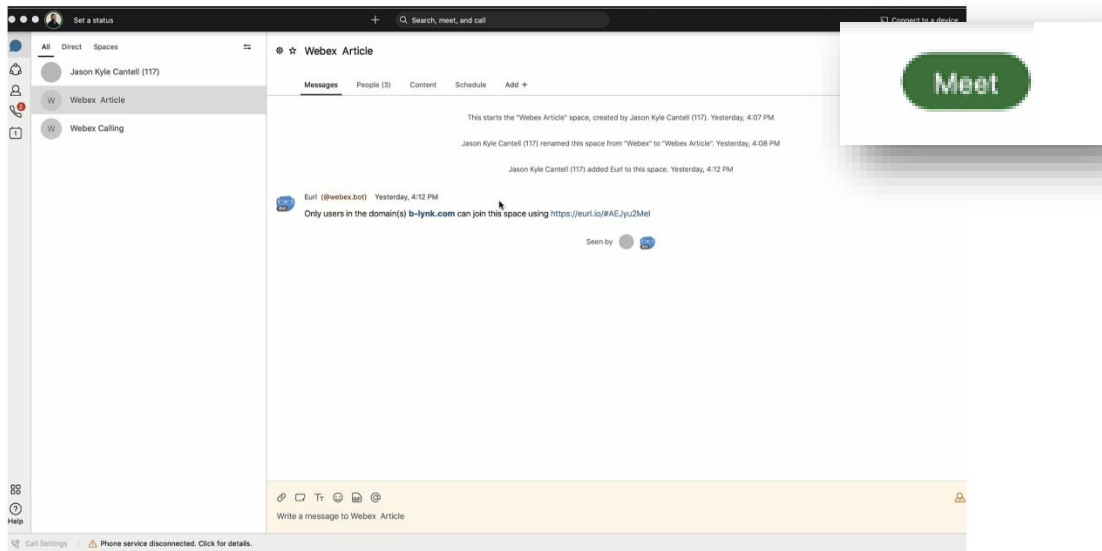
Answer a Call

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.



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.

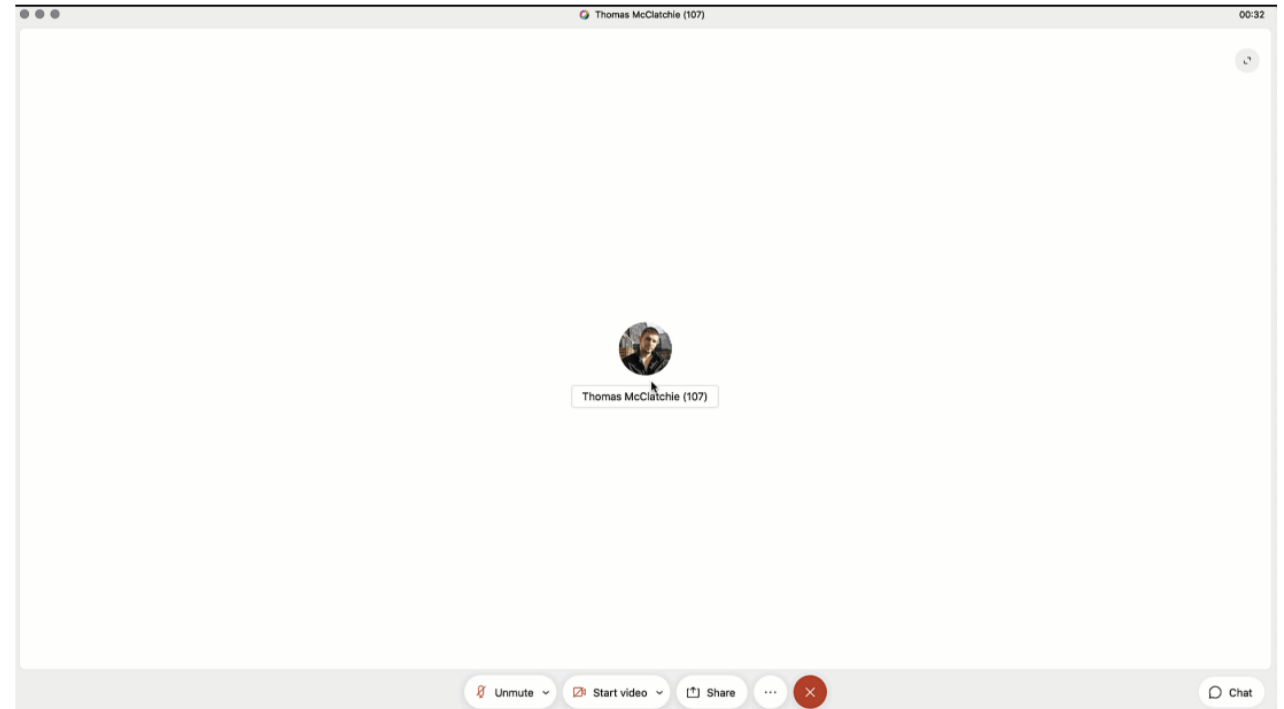


Step 2

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

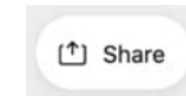
Click **New whiteboard**. Alternatively, you could reopen a whiteboard already shared in that space.

Step 5

Use the annotation tools to draw on the whiteboard.

Step 6

Click the **Share** icon.



Step 7

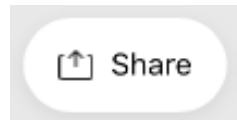
Click **Post snapshot** for your whiteboard to appear in the chat thread.

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

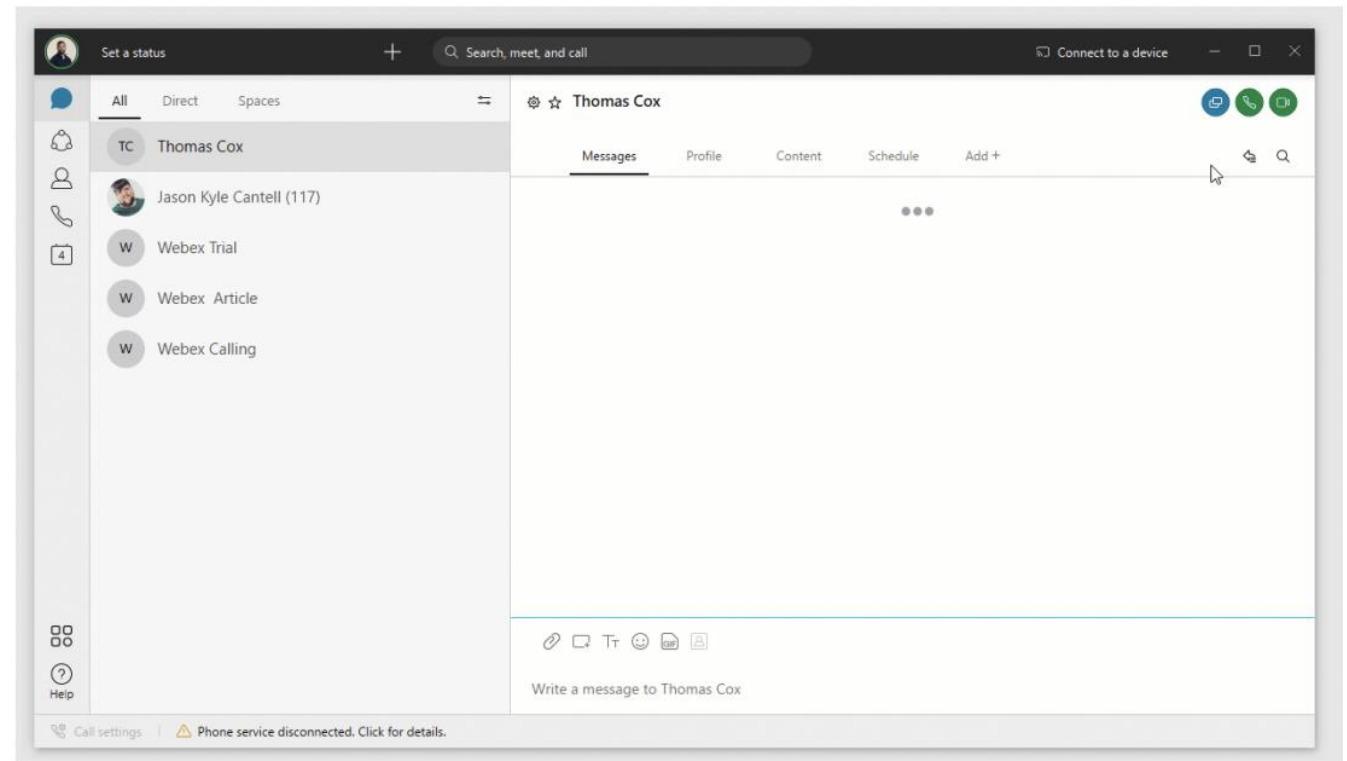
If you are planning to share a video, check **Share computer audio** and **Optimize for video** on top of the screen.

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

Tips and Tricks



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 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.

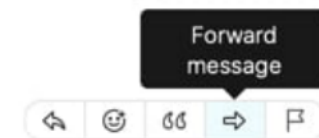


Add integrations to your space

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. Can't find what you need? Jump to [developer.webex.com](#) to build your own.








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 appearance	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.

Thank you for reading

Webex Essentials

