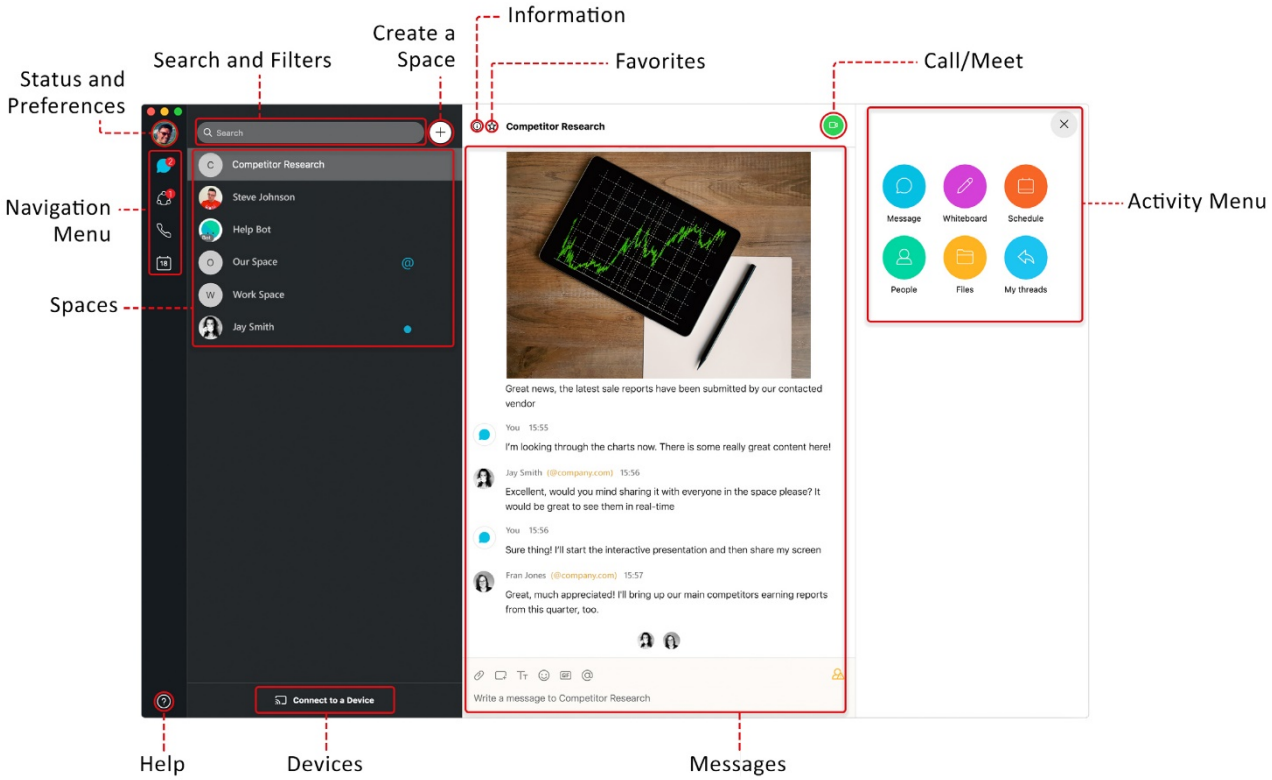
Cisco Webex Teams Quick Start Guide

Webex Teams interface overview

Webex Teams is the ultimate collaboration app to help your team stay organised. It's a workspace for real-time collaboration and communication with your colleagues through calling*, meetings, chats, file and app sharing, and even the occasional emoji.



Click the activity menu to access the space features

Messages: Send a message to just one person or to many people in a space.

Whiteboard: Create and share content on a whiteboard.

Schedule: Schedule a meeting or check space meeting information.

People: See who's in the space or Webex Teams meeting.

File: Find your shared files, photos and content.

My threads: See all your threads at a glance.

*Calling contacts outside of your organisation is only available if enabled by your administrator.

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Meeting scenarios in Webex Teams

There are a few different ways you can schedule or conduct meetings within Webex Teams. From recurring meetings to one-off meetings. Webex Teams has you covered.

Schedule meetings in a space

You can schedule one-off meetings, recurring meetings in a space. You can also call the space if you need to have a quick discussion or need a little inspiration. plus, all of your shared documents, files and photo's are there, so everything is in one place.

Schedule meetings outside of a space

There will be times when you need to schedule meetings that don't need a space. Such as 1-2-1 meetings, or a client or customer meetings. Or even just to want to have a meeting but don't need to share files or photo's. For these types of meetings, we recommend you use your **Personal Room**.

Your **Personal Room** is like having your own virtual office.

Schedule a meeting from a space

Use the Webex Teams app to create calendar invites for new meetings and have the email addresses of everyone in the space added automatically.

Step 1

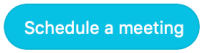
In the **space**, click the **activity menu**.

Step 2

Click **Schedule**.

Step 3

Click **Schedule a meeting**.

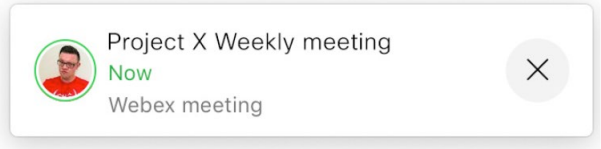


Step 4

Your calendar app will open with the meeting details. Enter the meeting title, date, time and recurrence if needed, then click **Send**.

Step 5

At the time of the meeting join via: **Webex Teams app** or click on the **pop-up reminder**.



Step 6

Click the **Join with Video** button.

Add a video device into your scheduled meeting invite

You can use your Personal Room to schedule one-off Teams meetings.

If you have a meeting room with a video device installed, such as a Webex Board or DX80, you can invite the video device by adding that room to your meeting invite.

When the room is added to the meeting the screen is automatically attached to the meeting as well.

When it's time to start the meeting click on the green **Join** button from the video device.

Tip: Any member of the space can start the meeting.

Note: You can add people not in your space to your calendar invite, however they will not be able to start or record the meeting, or access the features of the space such as message, files, whiteboard, etc.

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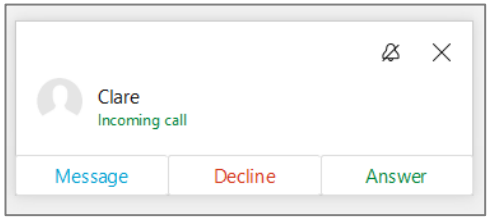
Calling features

(If enabled within your organisation)

Answering a call

When someone calls you, you'll get a notification that asks you to Message, Decline or Answer.



1. Click Message to send a message to the person calling.
2. Click Decline to decline the call.
3. Click Answer to answer the call.

Add someone to a call

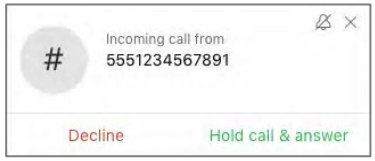
1. Click **More** and then **Add guest**.
2. Type their name in the box, click on the contact and then click **Call**.

Put a call on hold

1. Click **More**
2. Select **Hold**.

Answer a call that is waiting

While on an active phone call, you can hold the call you're on and answer the incoming call.

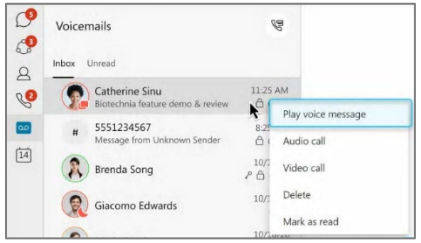


Transfer a call

1. Click **More** and then click **Transfer**.
2. Enter the number or name of the person you want to transfer the call to.
3. Select whether you want to make an **Audio** or **Video** (the original call is placed on hold).
4. Confirm the transfer with the person and click **Complete Transfer**.

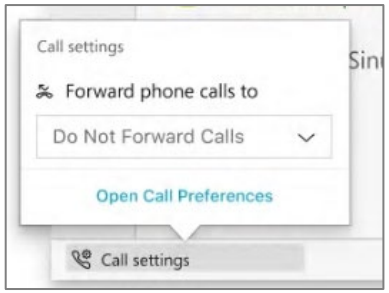
Check your voicemail

1. Go to voicemail by clicking on tab.
2. Right click on the message and select **Play voice message**.
3. Click **Play**
4. You also have the option of calling the person back with an **Audio call** or **Video call**, **Delete** the message or **Mark as read**.



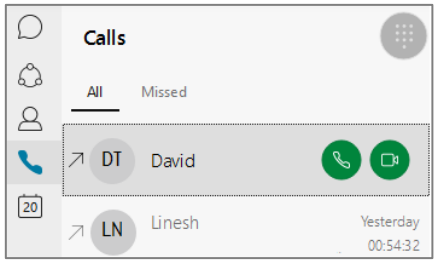
Set up call forwarding

1. Go to **Call settings** and select where to forward your calls, such as to voicemail, another work line if you have multiple lines, or a number you've set in the past. Or, to add another number go to **Open Call Preferences**.
2. To stop Call forwarding, select **Do Not Forward Calls**.



View call and meeting history

1. Go to the tab.
2. Click **All** or click **Missed** to view calls or meetings you missed.
3. You can call someone back by hovering over their contact and choose to make an **Audio** or **Video** call.



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Make a call

(If enabled within your organisation)

Webex Teams Make a call

In Teams, you can place a call from a chat, the command bar, calling tab or from anywhere you interact with the person you want to call.

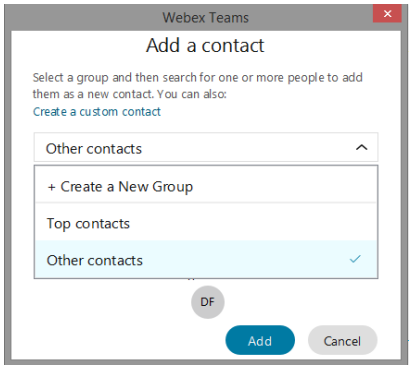
Making a call using the Calls tab

1. Click the **Calls tab**
2. Use the keypad to dial the number or the number keys on your computer keyboard.
3. Click the **Audio** button.

Adding people to your contacts list

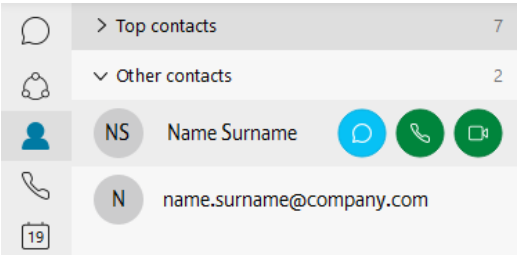
1. Search for a contact.
2. Right click on the contact and select **Add a contact**.
3. Select the relevant group and click **Add** or,
4. Right click on a person's name in the Messaging tab and select **Add to contacts**.

Note: you can create a new group for your contacts or add them to the predefined groups.



Making a call using your contact list

1. Click the **Contacts** tab.
2. Find the person you want to call.
3. Click the **Audio call** icon next to their name or Click on **Video call**.



Make a call from the Search bar

1. Click in the **Search bar** at the top of the window.
2. Type the name or e-mail address of the person you want to call.
3. Click on the **Audio call** to start the call.

Placing a call from a Space

If you have multiple people in your conversation, this will start a conference call with all the participants. Everyone will need to accept the call on their side before you can meet with them.

1. In any conversation, you'll find the **Meet** button Meet in the top right corner.
2. Click on **Meet** to place your call.

Placing a call from anywhere in Teams

You can place a call anywhere you interact with your contacts by using their contact card.

1. Hover your mouse over a contact's picture in a chat, team tab etc.
2. Click the button to place your call.
3. Use these contact cards to start an audio call, video call, email or an IM.