

# Unified Communications as a Service (UCaaS) with Webex

June 2022



# Webex | Download the App

You can get Webex for your computer, mobile device, or web browser. Install it on multiple devices and switch between them hassle-free because the app automatically knows which device you're using. Your content stays in sync because everything is stored in the cloud.

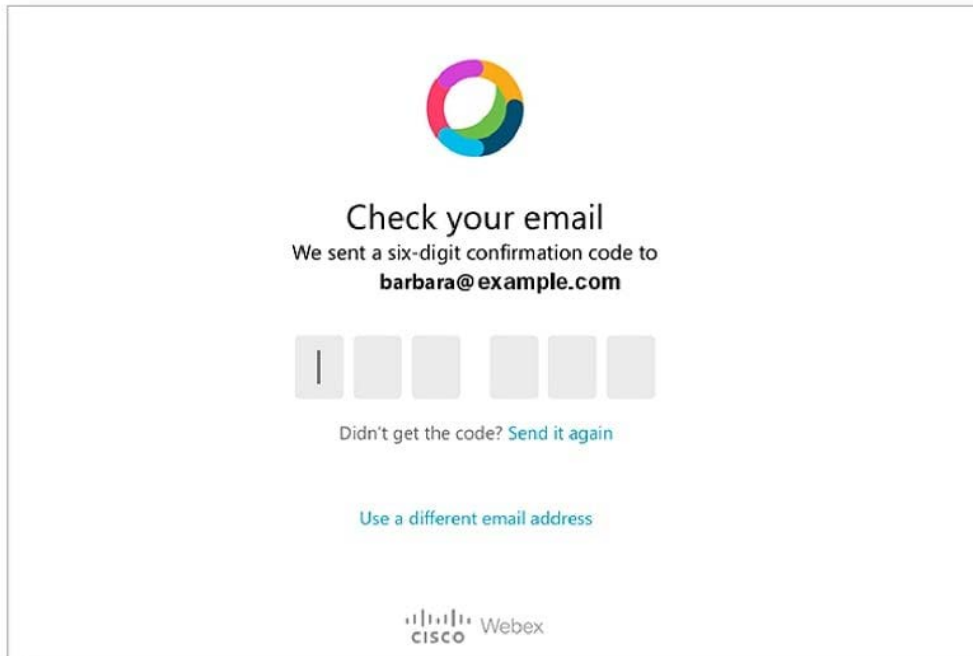
Go to <https://www.webex.com/downloads.html> and get Webex for Windows, Mac, iPhone, iPad, and Android. Go to <https://web.webex.com/> for Webex for Web.

# Webex | Sign In for the First Time

We've made it easier and faster to sign in to Webex for the first time. There are fewer screens and a few other changes, depending on whether you're joining from a computer or mobile device.

## WINDOWS, MAC, AND WEB

Webex is now making it easier to authenticate yourself by using a confirmation PIN when creating your account. The first time you sign in to the Webex app for Windows or Mac you receive a six-digit confirmation PIN to verify your email address. Then, you can create your password and sign in. This increases the safety and security of the sign-in



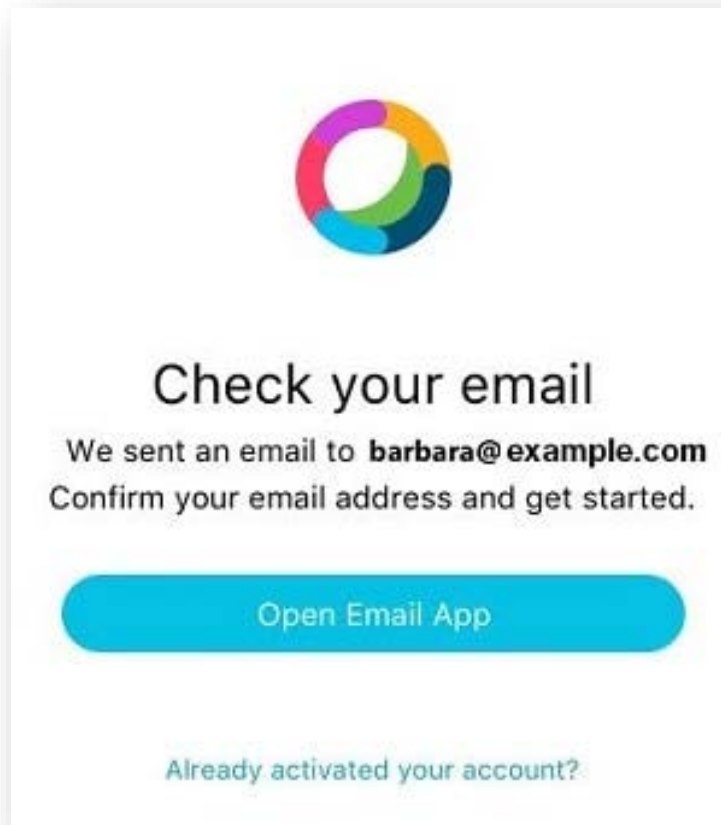
process.

If you didn't receive the confirmation code, check your email account details are correct and click **Send it again** .

You won't receive a PIN if your organization uses Single Sign-On (SSO) to sign in to Webex.

## IPHONE, IPAD AND ANDROID

If you are signing in from a mobile device you receive an email link to verify your email address, you can then create

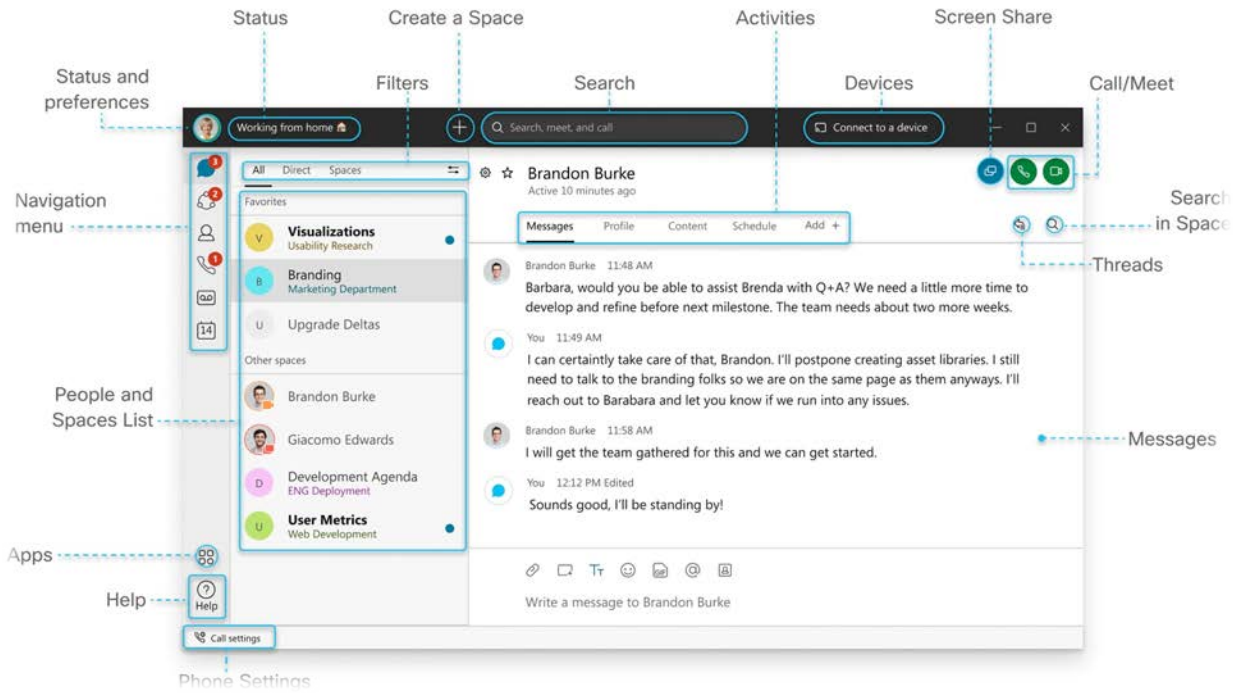


your password and sign in.

# The Webex App UI

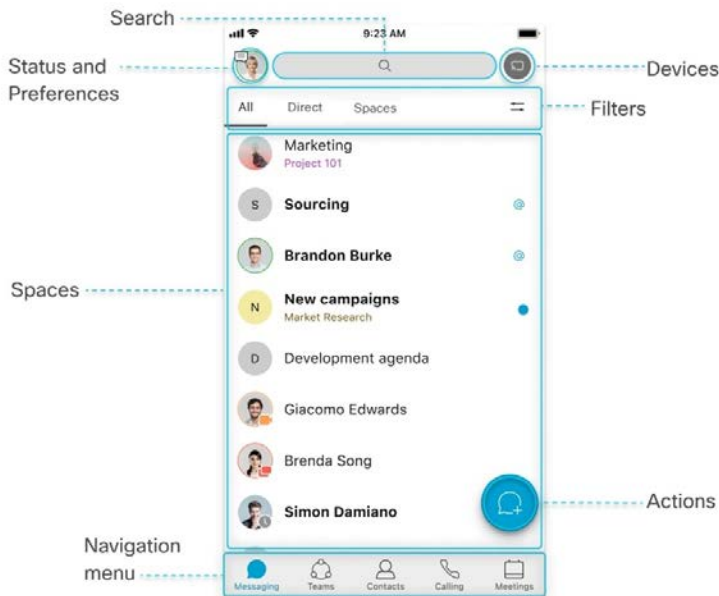
Welcome to the Webex app. Take a look around to get used to the app's interface and how we talk about it.

## WEBEX FOR WINDOWS AND MAC

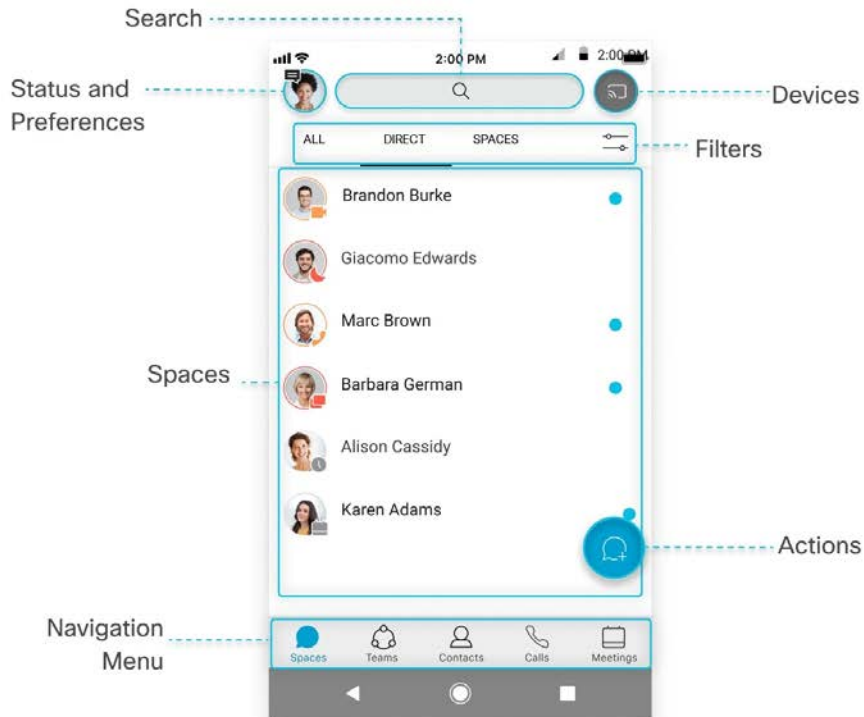


Webex for

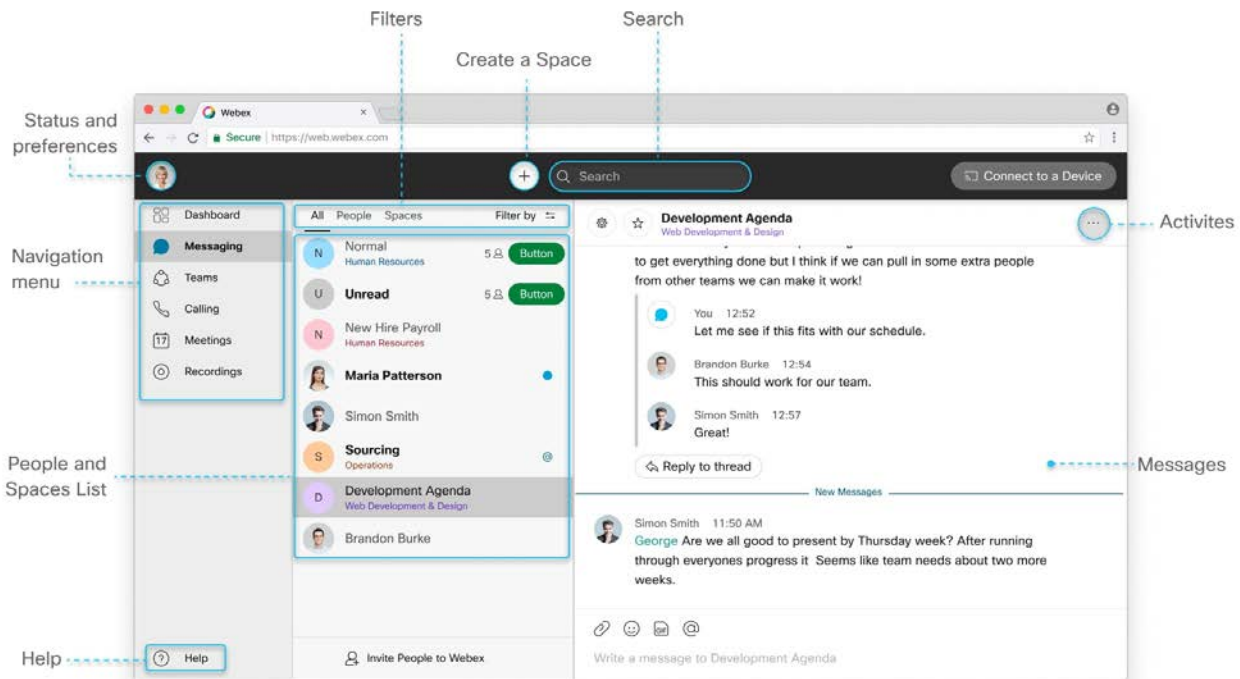
iPhone




## WEBEX FOR ANDROID



## WEBEX FOR WEB



## HELP



On Windows and Mac, you'll see **Help**  at the bottom of your spaces list. By default, that link brings you to our [Webex page](#) on our Help site, but your administrator might customize that link to direct you to another site instead.

## SPACES

Your group work takes place in spaces, either in groups or in direct messages with another person. They display prominently so you can get to them whenever you need to. Your most recently active spaces are at the top. If anyone has added you to a new team or space, you'll see it here too. When someone's posted a new message in the space, you'll see the bolded space name.

You'll sometimes see icons letting you know what's happening in your spaces. These [notifications](#) give you information about new messages you've received and spaces you've been added to.

## NAVIGATION MENU

Switch easily among your message, team, call, and meeting views. Messages appear by default, but your teams, calls, and meetings are just a click away. When you have unread messages in your spaces or teams, you'll see counters next to **Messaging**  and **Teams** .


## PROFILE AND PREFERENCES

In the app header click your profile to update your picture or name, access your settings and preferences, and set your availability. If you have some important work to finish or are on a call, let people know that you don't want to be disturbed: whether that's for a few minutes or an entire day is up to you.

## STATUS


In the app header click **Set a status**, select a status from the list or create and share any status you want, so your colleagues know what you're up to.

## SEARCH


In the app header, just click  **Search, meet, and call** to search through the history of your conversations to find people you're talking to, spaces you're in, messages you received, and files you need.


## FILTERS

Click  to see the available filters. Then, select a filter to show just the messages or spaces you want to see.

Tap , on your mobile device to see the available filters. Then, select a filter to show just the messages or spaces you want to see.

## START A CONVERSATION, MAKE A CALL, OR ADD A CONTACT

In the app header, click , and select **Send a direct message** to create a direct message space between you and just one other person, or select **Create a Space** to start a group conversation. You can also select **Make a call**, or select **Add a contact**.

Tap  , on your mobile device and select **Send a direct message** to create a direct message space between you and just one other person, or select **Create a Space** to start a group conversation.

## DEVICES

In the app header on Windows and Mac, you can connect automatically with Webex devices from the **Connect to a Device** menu. When connected, you can share your screen, start a call, or open a space (on Webex Board). You can also connect to your desk phone from the menu to make calls and join meetings. If you have a lot of devices close by, you can set certain devices to not automatically connect.




## ACTIVITIES

Whenever you're in a space, click the activity menu tabs to get access to all the different activities you can do:

**Messages** — Messages are where you chat with colleagues. We keep these messages secure so you can feel confident sharing your work ideas in Webex.


**People** —see who's in the space, or if you're a moderator you can add people to the space.


**Content :**


-  **Files** —find your shared files, photos, and whiteboard content.
-  **Whiteboards** —create and share content on whiteboards.
-  **Links** —see all links shared in the space.

**Schedule** —create a meeting from the space or get a list of meetings already scheduled for the space.


## CALL/MEET

 **Audio**—make an audio call to a person.


 **Video**—make a video call to a person.

 **Meet** —start a meeting with everyone in the space.

## MY THREADS

 —see threads that you are a part of in the space.

## SEARCH IN SPACE

Click  to search through the conversation history of the space you're in, to find messages you received, and files you need.

Although we didn't show these options on mobile, just click a space name from the list and click the activity menu to choices.

## PEOPLE LIST AND SPACE SETTINGS

On Webex for Web, you can also see people in the space and update the space settings directly from the new activity area.

# Get Started with Webex

In real-time or anytime, Webex is engaging, intelligent and inclusive and helps you create exceptional experiences and makes working together distinctly better.

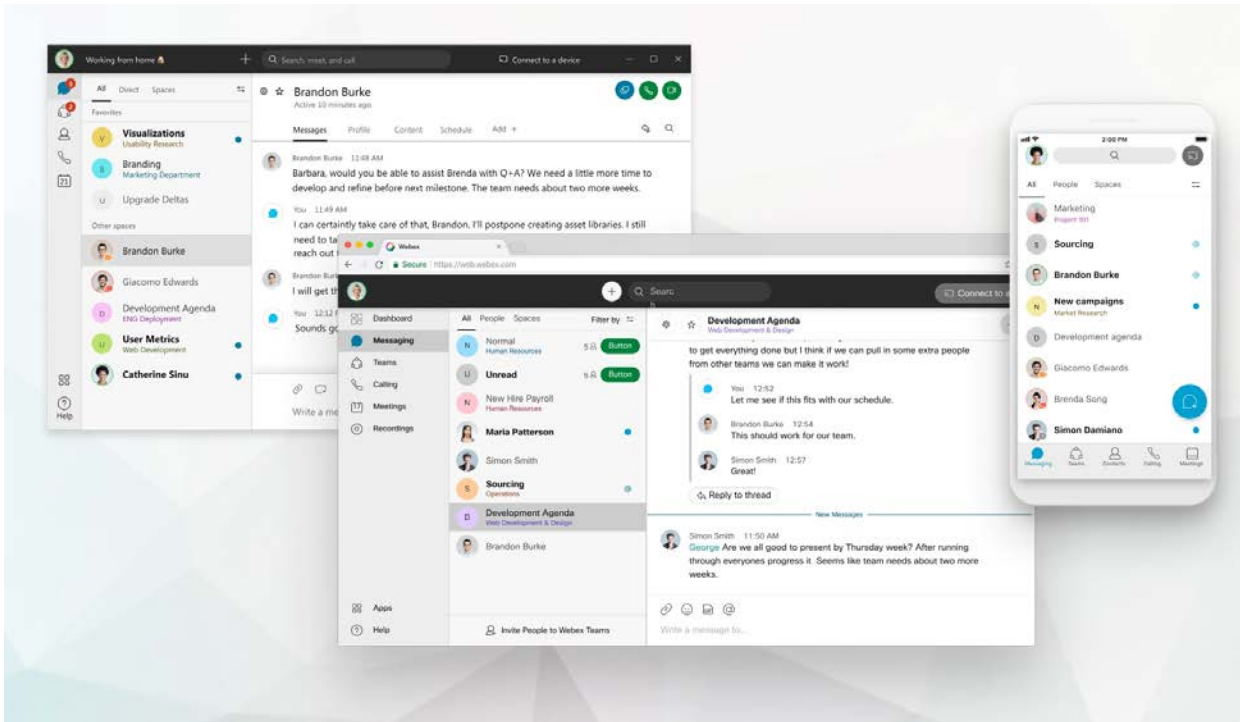
The all new Webex is one easy-to-use and secure app you can use to call, message, meet, and get work done:

- It brings everyone together to do exceptional work.
- It makes you smarter; it's personalized to you.
- It gives you options to choose how you work.
- It moves fluidly while you call, message, and meet.

We're glad to have you join us! If your company's already given you an account, you're ready to get started.

If you don't have an account yet, first choose a [plan](#) that works best for you, then you can get started using [web.webex.com](http://web.webex.com) or by [downloading](#) the app. When you sign in for the first time, you're guided through some tips on how to use the app.

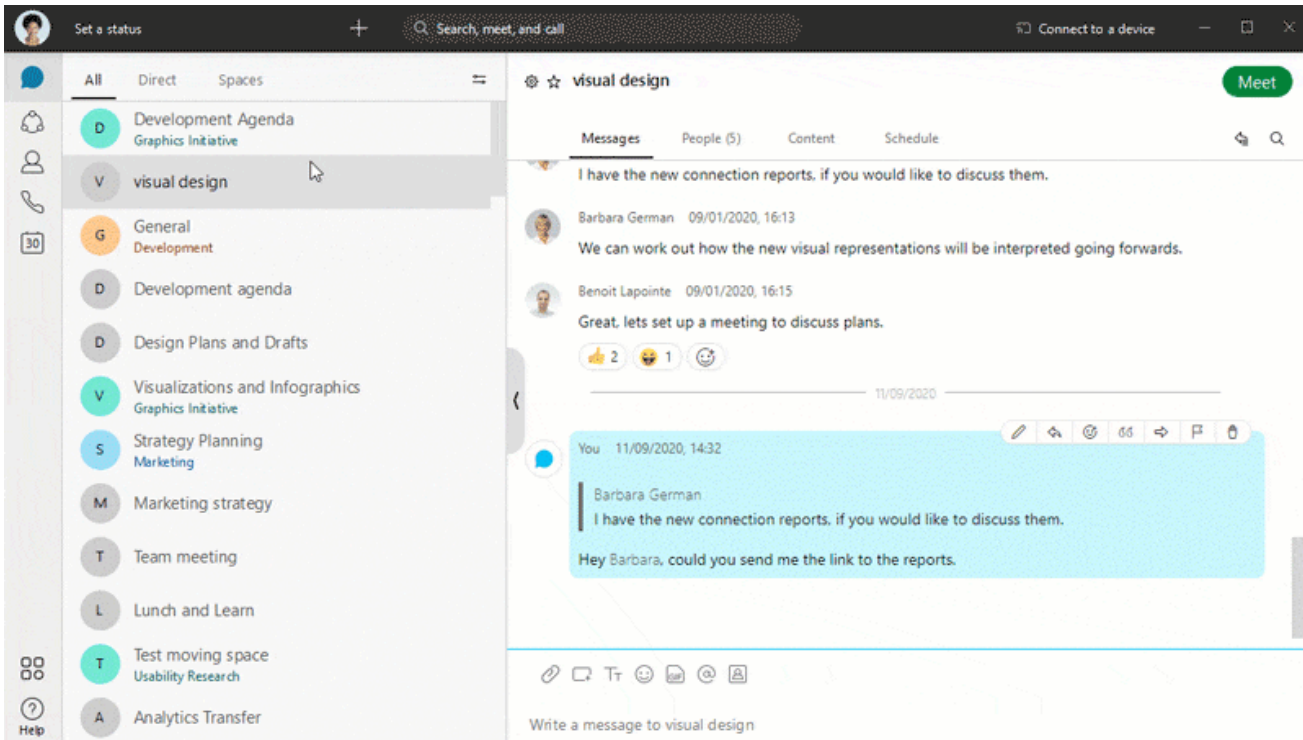




## Start working together

When you start a conversation with someone, it [creates a space](#) between you and the people you invite to the conversation. You can invite anyone (including people outside your organization) to join in on a conversation. All you need is their email address.

All your work takes place within [spaces and teams](#). Spaces give you a place to collaborate on a specific topic or project. In a space, you can [send messages](#), [schedule meetings](#), and [call other people](#).

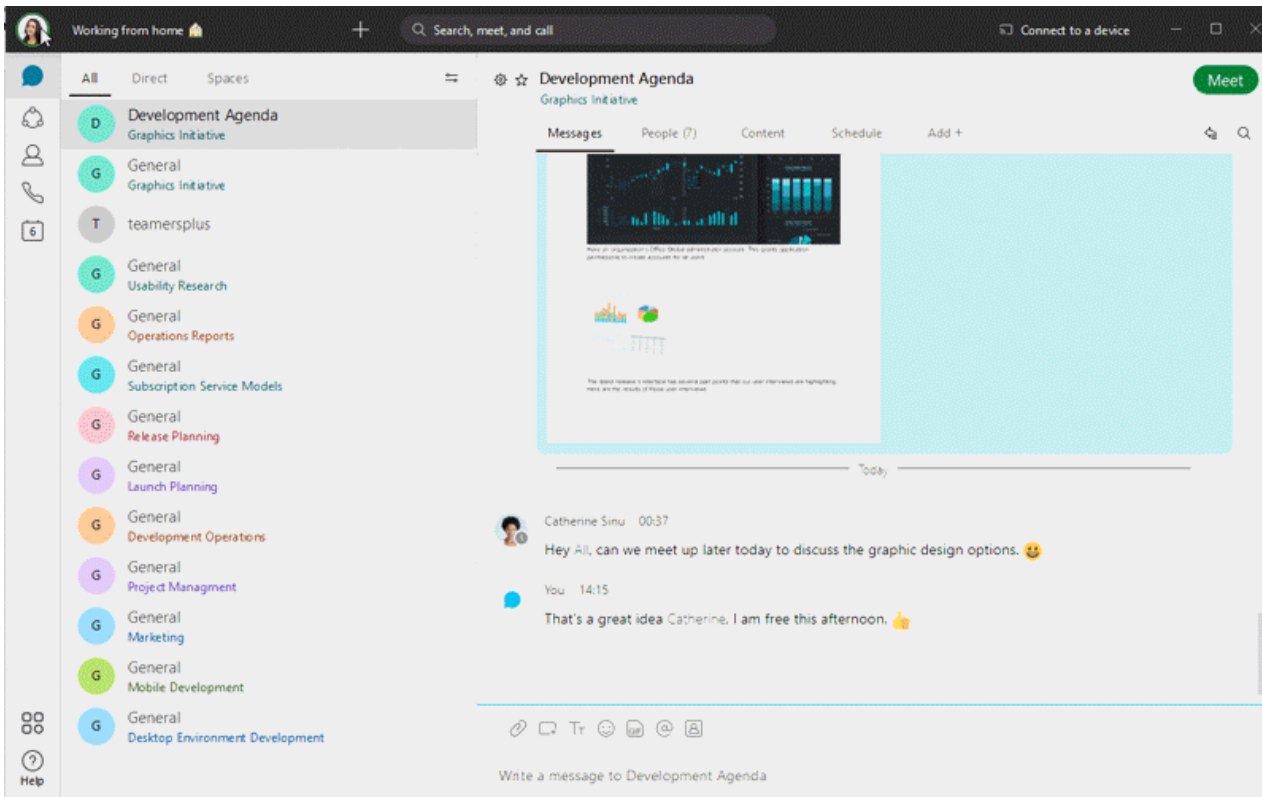


If your original intention changes and your project outgrows its original purpose, you can [create a team](#) and then [move a space into a team](#). Teams help you keep everything organized by putting multiple spaces under a common theme. Teams are great for a consistent group of people who are going to be working on *something* for a long time. That *something* can involve many activities or can be subprojects happening at the same time.

And you find that you're in too many spaces and some of them don't require your input or you don't need to keep up with that particular conversation, you can [leave any space](#) at any time.

### Elevate important information

Right away, you're notified about all messages coming your way. Work smarter by keeping track of what's important to you. You can [play around with your notifications](#) until you figure out what works best for you. For example, you can set it up so that you're only notified when you're @mentioned in [any space](#) or when any message gets posted in your most [important spaces](#). And if you're not interested in a particular space, you can [leave it](#) or [hide it](#) so that you're no longer notified about messages posted to that space and it doesn't show up in your Spaces list.



You can also [see other people's availability](#) so that you can find the right time to connect with them. For example, if you see a green circle around someone's profile picture, it means they've been using the app within the last 10 minutes so chances are, you'll get a response if you reach out.

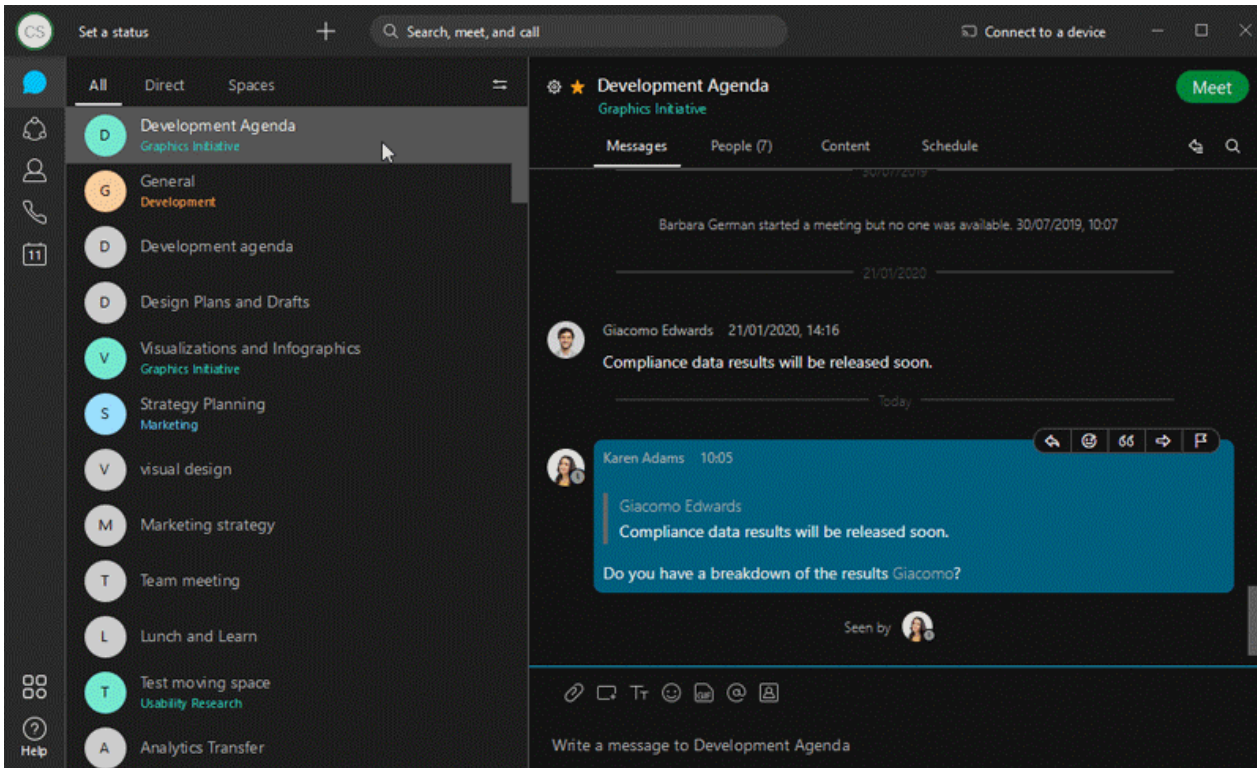


On the other hand, if you see someone doesn't want to be disturbed, you might want to wait before reaching out.

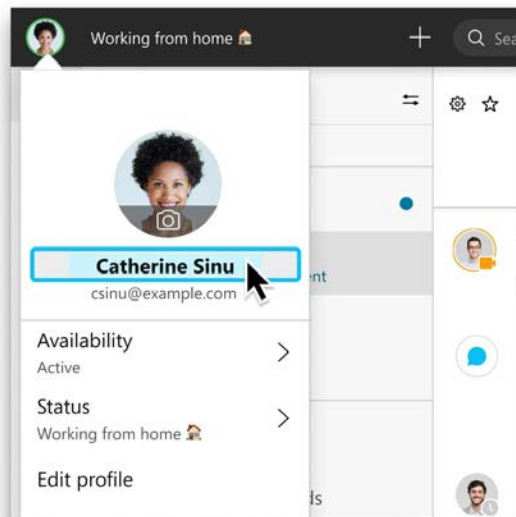


### Personalize Webex

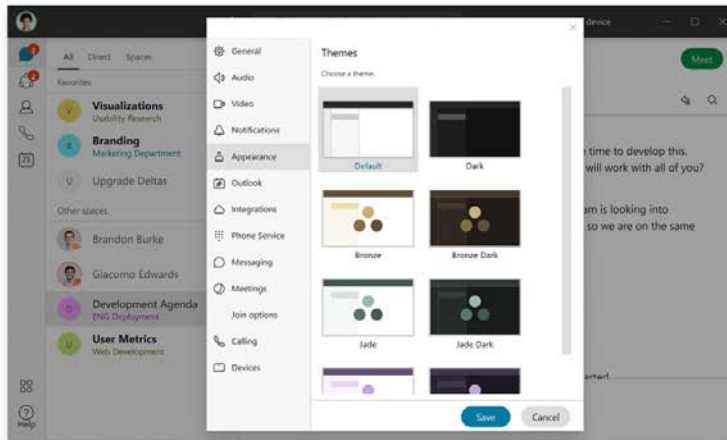
Make Webex feel more like your own by personalizing it a bit. Start by adding your own photo as your [profile picture](#) so that other people can recognize you.



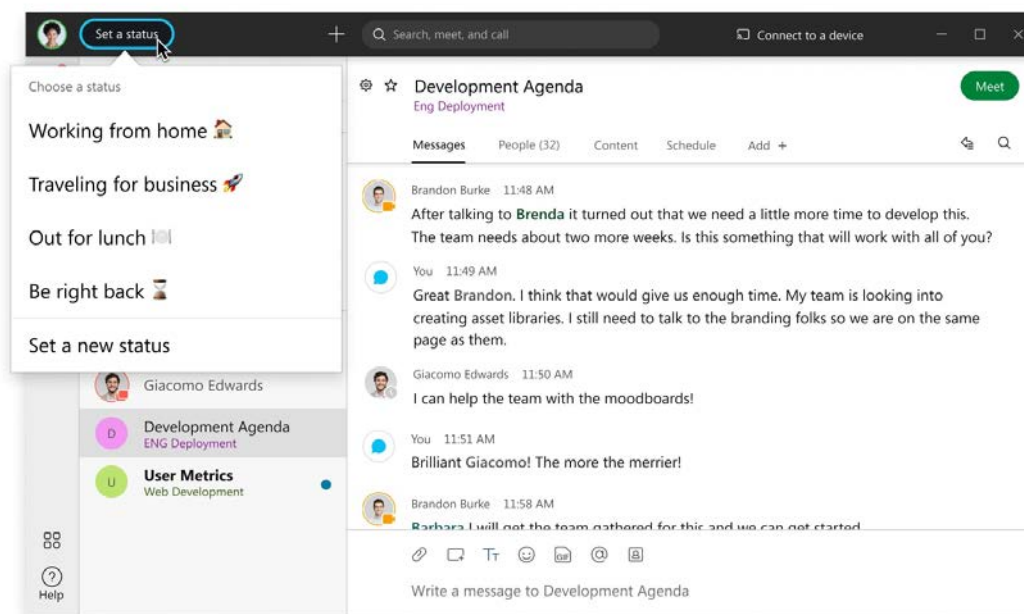
You can change your [display name](#) to a nickname.



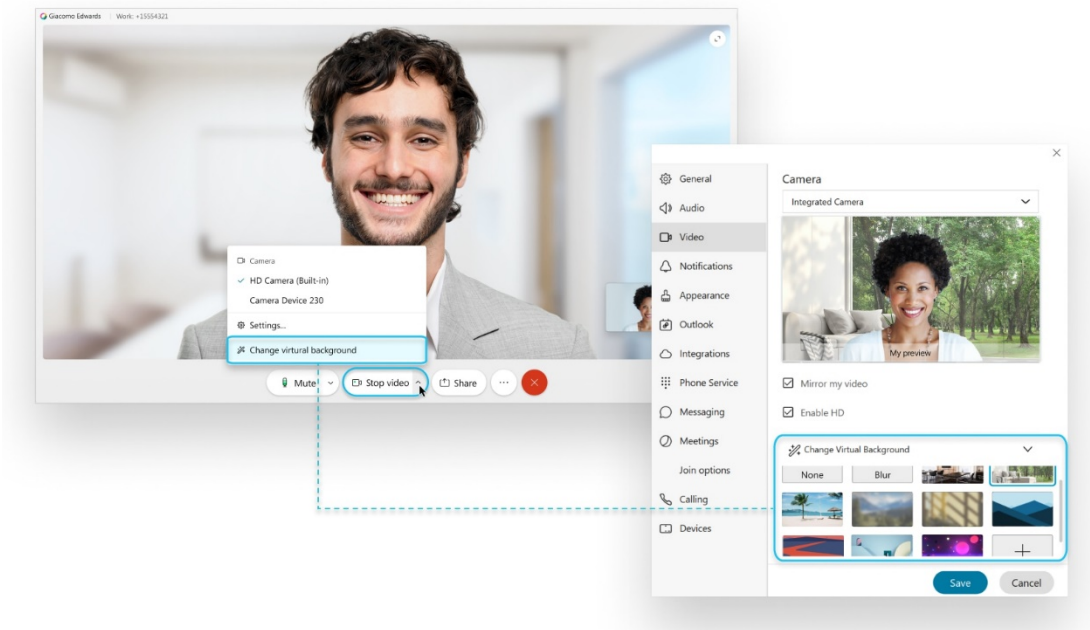
Add more color to your view by choosing your [preferred color theme](#).



You can [change your status](#) to be something more descriptive. If you have to step out for a bit or you're busy, you can let people know just by changing your status in the app. For example, you can set it to **be right back** or let people know you [don't want to be disturbed](#). You can also make up a [custom status](#) so people know what you're up to.



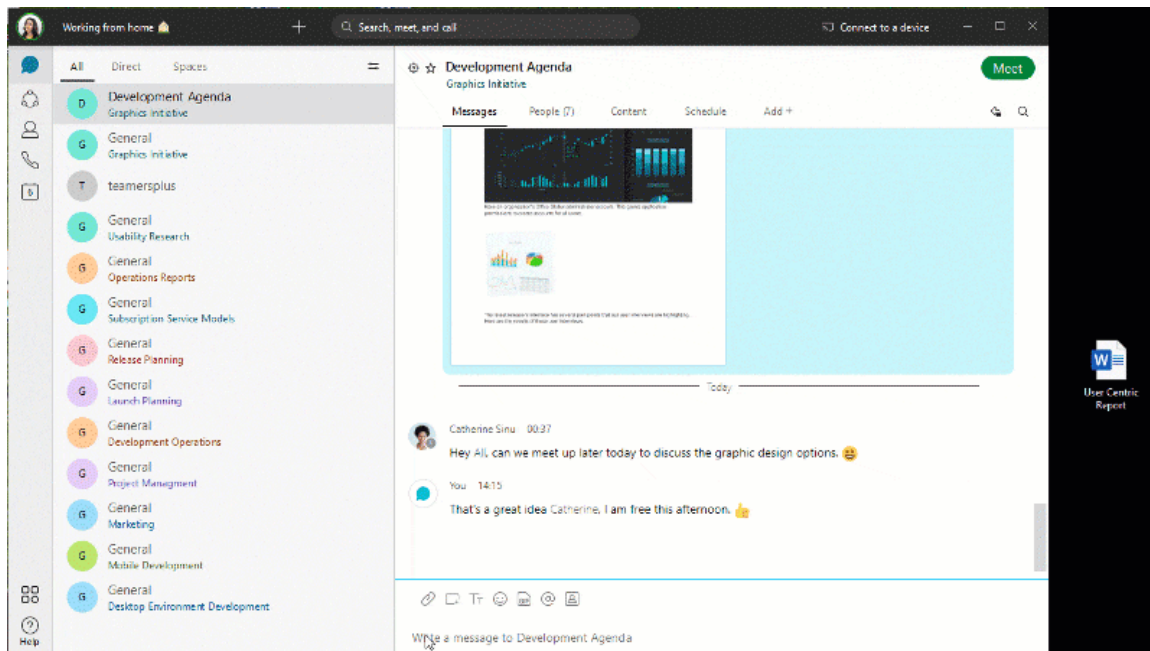
If you're in a call or meeting and you're sharing your video, you can [blur your background](#) to hide anything around you or even use a fun [virtual background](#).



## Send a message

When you write your messages, you can [send a quick one](#), or make it stand out with more [text formatting](#) and [emojis](#). You can also [share files, pictures, videos, and even gifs](#). Webex keeps a list of all the [content shared in a space](#), so you'll never lose track of them. Use [@mentions](#) to make sure the right people see your message. Don't worry if you've made a mistake and need to [edit](#) it or if you've pasted in the wrong space and need to [delete the message](#) entirely.

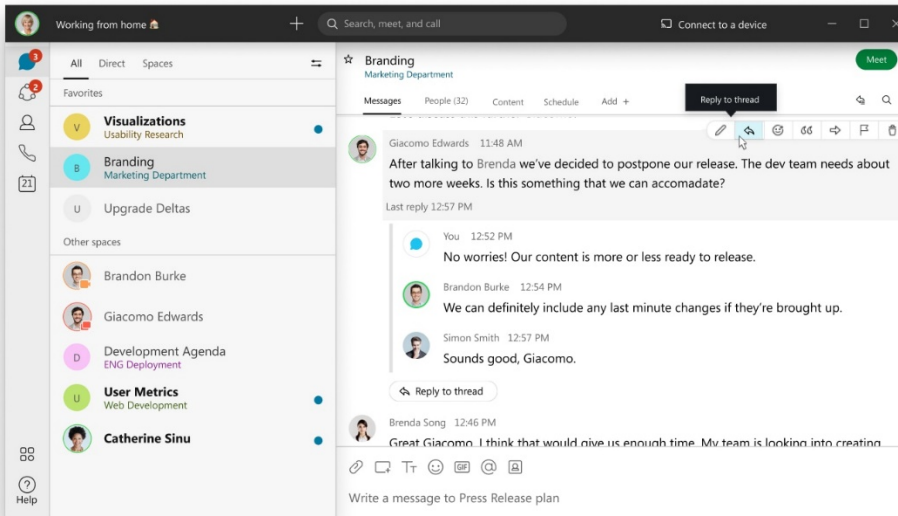
Your messages are persistent. The next time you message the group, your conversation picks right up where you've left it. And after you send a message, you can [see who's read your message](#).



## Read and respond to messages

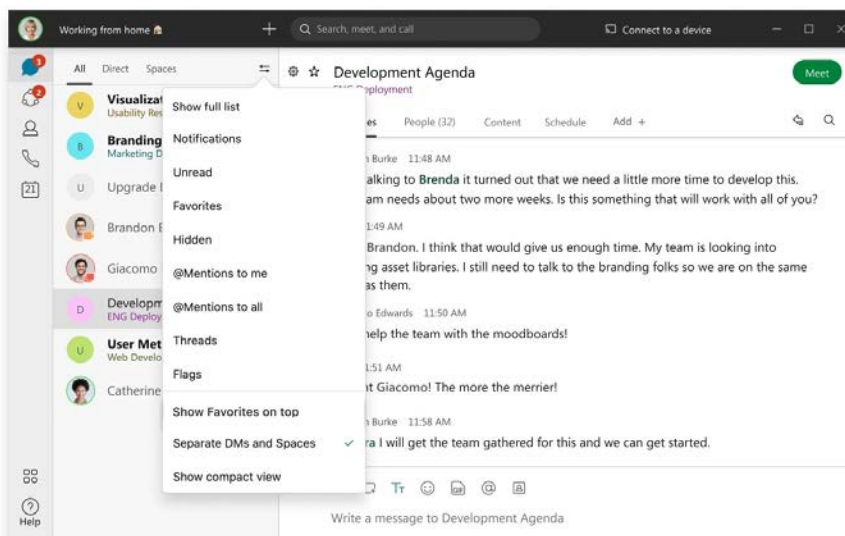
When you get a new message, you're notified right away. If you're too busy to respond but want to see someone's message, you can just [take a quick peek](#) instead. People won't know that you've seen the message.

You can also make it easy for yourself and others to follow a specific train of thought using [threading](#), [quotes](#), and even [forwarding](#) a message to someone else.

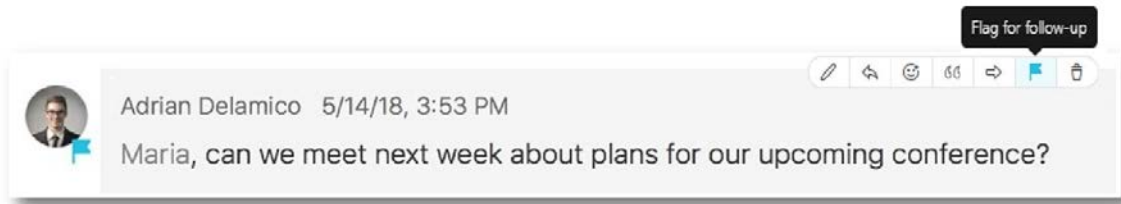


## Organize your messages

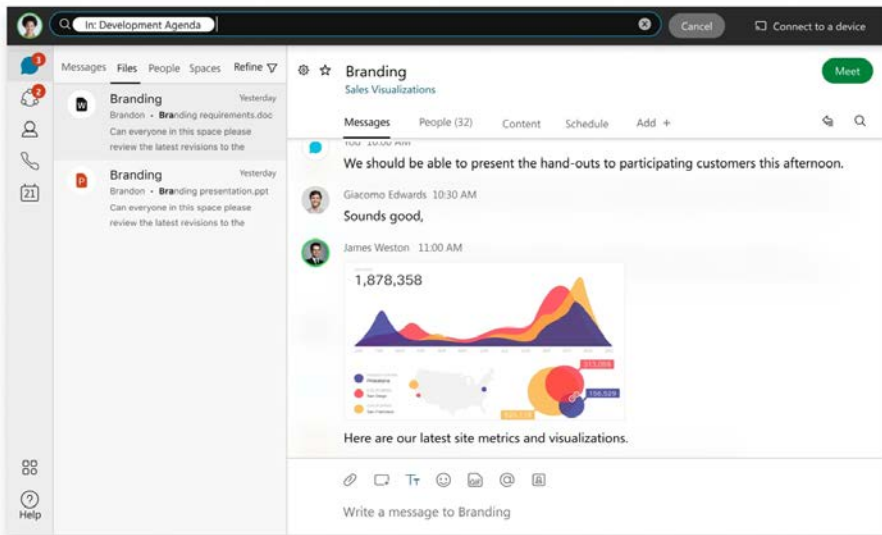
Another way to help keep you productive is by organizing your messages. You can [filter](#) your messages so that you can focus on just your unread messages, for example, or just spaces where you've been @mentioned.



You can also [flag important messages](#) so that you can refer back to them easily.



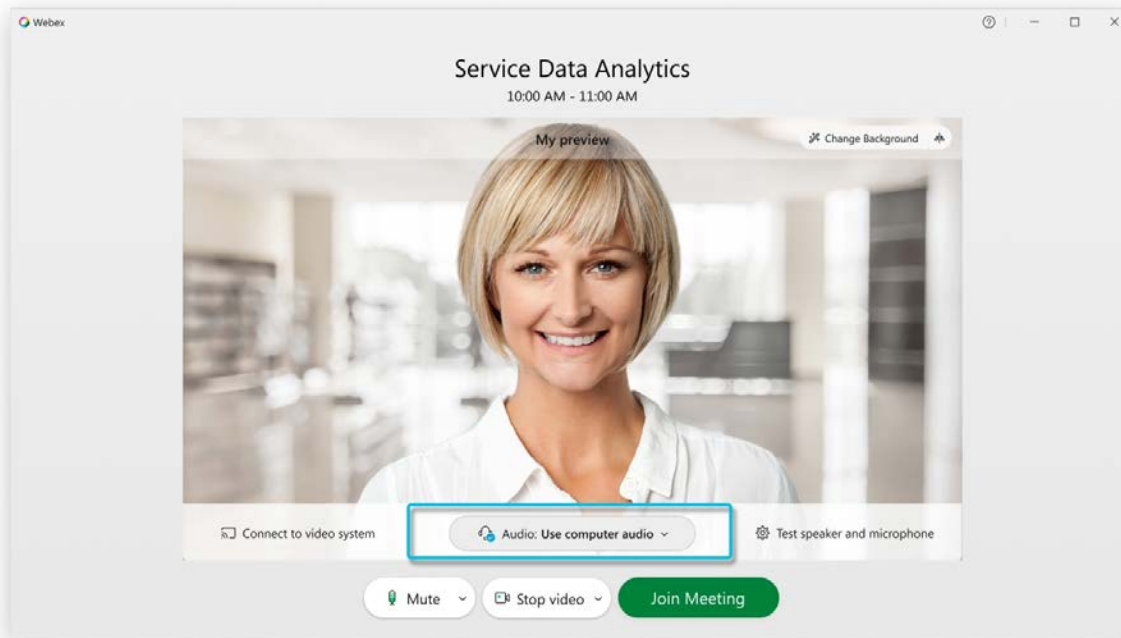
And if you're looking for a message or a file that was shared but can't remember what space it was posted in, you can [search](#) for it.



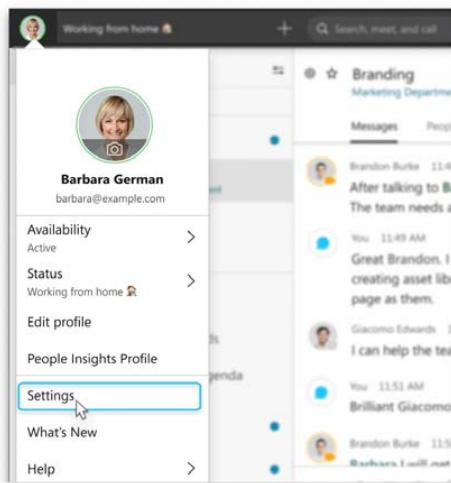
## Customize your audio and video preferences

When you join a meeting from your computer, the app automatically detects the audio and video devices you have connected to your computer, such as a headset. You can [change your settings right before you start or join a meeting](#), like if you want your video on or you just want to dial into a meeting with audio only.





You can also make some of these your [default settings](#), if you'd like.



You can customize your [video](#) settings:

- Choose what camera to use.
- See yourself like you're looking in a mirror ([Mirror my video](#)).
- Blur your background or use a preset or custom [virtual background](#).

You can also personalize your [audio](#) settings:

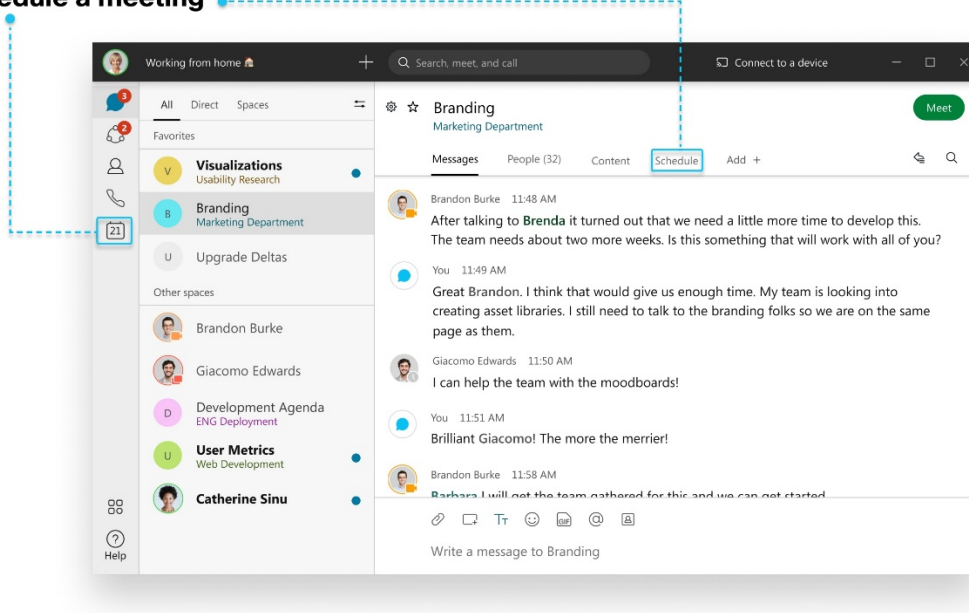
- Choose a headset, speaker, or microphone.

- Reduce disruptions with background noise removal and speech enhancement.

### Start your first meeting

With Webex, you can meet whenever you need to—right away or later. There’s two ways to start or schedule your meetings in the app, either from the calendar or from your spaces. No matter which you choose, you can connect with video or just audio, [record your meetings](#), [set your virtual background](#), [get rid of distracting background noise](#), and [share your screen](#) during your meeting.

### Schedule a meeting



### From a space

If you’re already working together in a space, anyone can [start an instant meeting](#) to meet right away or [schedule one for later](#). With these types of meetings, everyone in the space gets invited automatically and gets treated like a host. So, during the meeting, everyone can let people in, mute people, and record. Since you’re meeting in the same space where you’re working, you get easy access to your messages, files, and whiteboards, and you can work on them while you’re in the meeting.

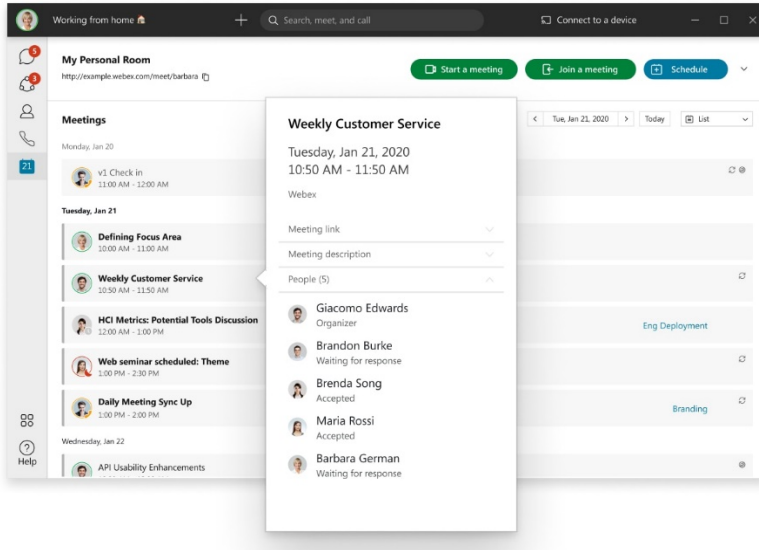
### From a calendar

From your Meetings calendar, you can [start a meeting right away in your Personal Room](#). You’ll see this option if you have a host license, and it gives you a virtual conference room assigned just to you. Because it’s your own room, your link’s always the same.

If you don’t see that choice, you can still [schedule a meeting](#) with anyone else. You don’t need to be connected to them in the app, and they don’t even need to have a Webex account. Plus, you or anyone you assign as a cohost can start the meeting, invite people to it, start breakout sessions, enable recording transcripts, and more.

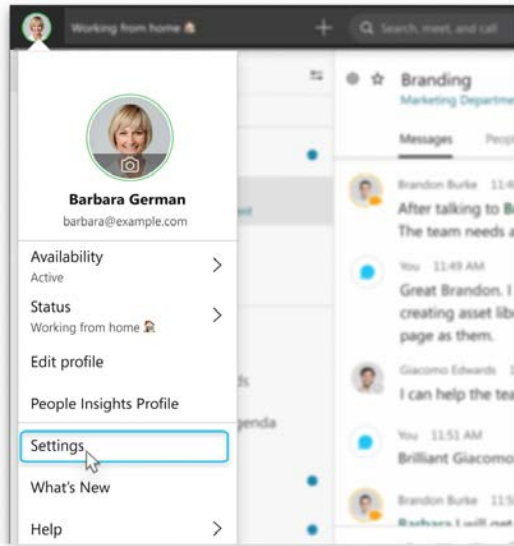
### See your upcoming meetings

Knowing what meetings you have can help you plan your work day. You can [view details about your upcoming meetings](#) in your meetings list, like what the meeting is about, when it's happening, who's invited, and who scheduled the meeting. When it's time for a meeting to start, you can join it from the meetings list, too.



## Customize your audio and video preferences

When you make or receive a call, the app automatically detects the audio and video devices you have connected to your computer, such as a headset. You can change your settings right before you make a call, like if you want your video on or you just want it to be an audio call only. You can also make some of these your default settings, if you'd like.



You can customize your [video](#) settings:

- Choose what camera to use.

- See yourself like you're looking in a mirror (Mirror my video).
- Blur your background or use a preset or custom virtual background.

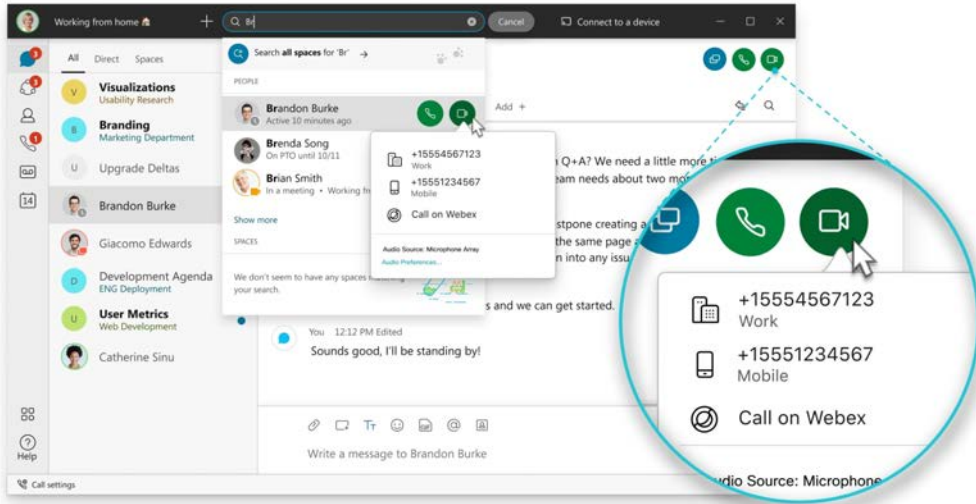
You can also personalize your [audio](#) settings:

- Choose a headset, speaker, or microphone.
- Reduce disruptions with background noise removal and speech enhancement.

### Call someone on Webex

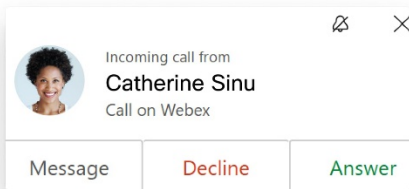
You can [call anyone with a Webex account](#) without any additional plans or services. If you're connected to each other in Webex, you can call them on Webex. These are special types of calls that let you add guests to the call, share your whiteboard, and share your screens. You don't use their phone number; you just need to be connected to them in the

app. Just look for the Audio  or Video  icon.



### Answer a call

When you get a call, you get a notification that you can use to accept or decline it. If the person calling you has a Webex account, you can also message the person back if you're not able to take the call right away.



## Call someone with a phone number

If your organization has configured your Webex account with a [phone service](#), you can also [call anyone else with a phone number](#). This type of calling requires additional services so check if your account has a [phone service](#), associated with it.

When you call like this, it's just like making a regular phone call from any other type of phone. If you want to call your favorite restaurant to make your lunch order, call them right from the app, and place your order.

When you're in a phone call, you may have access to certain features. Here are just a few features available:

- **Put a call on hold**—If you're on a phone call with someone and you get interrupted with something else that you need to take care of, you can [put the call on hold](#) and resume it when you're free to chat again.
- **Transfer a call**—When you're on a call, you can [transfer that call](#) to someone else.
- **Forward a call**—If you're going to be away from your desk but don't want to miss an important phone call, you can [forward your calls](#) to another phone number.
- **Add someone to your contacts**—You can [add people to your Contacts list](#), making it easier to connect with the people you message and call most often.
- **Voicemail**—Don't worry about missing important calls. People can leave you a voice message and you can [listen to the message](#) right in the app.

For a complete list of all features and what type of phone service you need for each feature, check out the [supported calling options](#).