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Webex Teams: Reference Guide

Introduction

Webex Teams is a platform with associated mobile apps for continuous teamwork with video meetings; group messaging, file-sharing and white boarding. Webex Teams is redefining the way people meet and collaborate. With a simple to use secure interface, Webex Teams allows you to stay connected in a perpetual way using messaging, file sharing, video calling and more.

Accessing Webex Teams

There is a variety of ways to access Webex Teams depending on location and needs. This manual is written with the desktop application user interface in mind.

Downloading Webex Teams from the Software Center

1. Click the Windows Start button.
2. Click All Programs (Windows 7) or All apps (Windows 10), then navigate to the Microsoft System Center folder.
3. In the Microsoft System Center folder, click Software Center.
4. Search for Webex Teams in the Search box or scroll through the applications to locate.
5. Click on Webex Teams and then click Install.
Overview of the Environment

1. **Navigation Menu** – Switch between spaces, teams, call and meetings view.
   a. **Message** – This is the default view and shows you activity in all of your spaces.
   b. **Teams** – All teams that you are currently part of show up as tiles.
   c. **Call** – Allows you to make phone calls as if you are on your TU desk phone.
   d. **Meetings** – view upcoming meetings in Day view

2. **Status/Preferences** – Add a profile picture, access your settings/preferences and set your status.

3. **Search/Filters** – Use a predefined filters or type custom search criteria to find information that you need.

4. **Spaces** – Group work takes places in spaces. You can create groups or personal spaces. The most recently active spaces are at the top.

5. **Messages Area** – This is where messages, files and whiteboards are housed in a persistent fashion.

6. **Activity Menu** – Click the activity menu to reveal activity circles allowing you to start a video call, meeting, whiteboard or to view all files.
Creating a Space

A space is a secure, digital workspace equipped with video meetings, messaging, calling, file-sharing, and white boarding. All of your work takes place within spaces. There are two types of spaces: personal spaces and group spaces. There are also Teams which contain spaces and will be explained later in this manual.

Creating a Personal Space

If you need to send a message directly to one person, create a personal space. The conversation remains private between the two of you. You cannot add other people to the conversation later.

1. Click the Message icon in the left navigation.

2. Click the Contact a person or create a space button (plus sign).

3. Click Contact a Person.

4. Contact a person will appear in the message area. Click in the Search for people by name or email gray box and enter the recipient. The name will appear in predicative search.

5. Click on the name or press ENTER to add the recipient.

Creating a Group Space

Group spaces work well when collaborating on a specific project or topic with more than one person. All team members automatically have the same privileges.

1. Click the Message icon in the left navigation.
2. Click the **Contact a person or create a space** button (plus sign).

3. Click **Create a Space**.

![Contact a Person][1]

![Create a Space][2]

**Figure 8**

4. Type the space name in the **Name the space** gray box.

5. Click in the **Add people by name or email** gray box and enter the recipient's email address or full name. The name will appear in predicative search.

6. Click on the name or press **ENTER** to add the recipient. Continue to add additional group members in the same manner.

![Create a space][3]

**Figure 9**

7. When you are finished adding group members, click the **Create** button. The new space will be added to the **Spaces** area and will appear at the top of the list.
All About Spaces

After creating a space, the natural next step is to populate that space. You may do this in several ways. You may add a message, an attachment file, a screen capture or even an emoji or gif.

The Message Area

You have the ability to create and receive messages, format the text, as well as add emojis and gifs. Messages can include a maximum of 5400 characters.

1. Click in the Write a message to area of a space.

![Write a message to OTS: Questions about Webex Teams](Image)

Figure 10

2. Type your message.

3. Press ENTER.

Note: If you wish to put a hard return in a space without sending the message, hold down the SHIFT key and press ENTER.

Formatting the Text

1. Within the message area, click the Format Text icon. A menu will appear beneath.

2. Select the text you wish to format.

3. Choose to make the text bold, italic or underlined by clicking on that icon. You may also create a bullet and number list and apply three (3) heading styles.

![OTS Training Staff Meeting](Image)

Figure 11

4. Press ENTER to send the message.
**Note:** If you want more control over the formatting, select **Markdown enabled**. You can't use both methods of formatting messages in the same message. If you switch to Markdown after applying any rich text formats, you will lose those styles.

### Adding Emojis and Gifs

1. Within the message area, click the **emoji** icon.
2. Choose from 80+ different emojis.

**Note:** Frequently used icons are in a category at the top.

![Figure 12](image)

3. Click the **GIF** icon.
4. Type in **search criteria** and associated GIFs will appear.
5. Make a selection and press ENTER to send the message.

![Figure 13](image)
Adding an Attachment

You can share most types of files (except for .tif files) in a space. The maximum size limit is 2 GB. You can also preview documents without downloading them first if they’re no more than 150 pages and less than 200 MB in size, and one of these file types: .doc, .docx, .gif, .jpeg, .pdf, .png, .ppt, .pptx, .svg, .xls, and .xlsx

1. Within the message area, click the Attachment icon (paperclip).
2. Choose the correct drive and directory.
3. Choose the file and click Open.

4. Type a message if you wish and then press ENTER to post the message.

**Note:** When you press ENTER, a preview of the document will show up in the team space.
5. Alternatively, you can drag and drop the file.

![Drop files here](image)

**Figure 16**

**Adding a Screen Capture**

1. Click in the message area and make sure whatever you want to capture is open on the desktop beneath the Webex Teams application.

2. Click the **screen capture** icon.

![Screen capture icon](image)

**Figure 17**

3. Your mouse will turn into a plus sign. Drag your mouse around the area you would like to capture. It will be outlined and have a blue tint within the captured area.

4. When you release your mouse button, the screen capture will be entered into the text area.

5. Press **ENTER** (or type a message first and then press ENTER).

![Screen capture in text area](image)

**Figure 18**

**Changing the Name of a Space**

1. Click on the space.

2. Click the i and then click **Edit space settings**

![Edit space settings](image)

**Figure 19**
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3. Click on the space name and type the new name of the space.

![Space Name](image)

**Figure 20**

4. Click **Save**.

**Webex Teams**

Teams allow you to create multiple spaces under a common theme. If you find that you begin to create many spaces with the same people in those spaces – it may be time to create a team. Teams are usually created for one of two reasons: you have grown out of space or you have a specific communication structure in mind for a large project or group. An example of a team might be - a group will be working on a project for a long period and there are different activities or subprojects that will be conducive to different spaces.

**Important Information about a Team**

- Teams automatically come with a General space. This space name cannot be changed. The General space is typically used for announcements where you can share important information as read-only messages.
- Everyone you add to the team is automatically added to the General space.
- When you create a team, you become the moderator of that team and everyone you add is a team member. As the moderator, you can add, remove and delete the team and all of its spaces.
- Anyone on the team can add spaces to the team.
- Team members have the option of joining additional spaces under the team – they do not automatically get added to additional spaces.

**Creating a Team**

1. Click the **Teams** icon in the left navigation.

![Teams icon](image)

**Figure 21**

2. Click the **New Team** button in the upper right corner.

![New Team button](image)

**Figure 22**
3. Type a name in the **Name this team** box and a description (not required) in the **What is this team about** box and then click **Create**.

![Figure 23](image)

4. Your new team will appear in a colored box. Click on the team to open it. Notice that a **General** space has automatically been created. This space cannot be renamed nor can it be deleted.

### Adding Team Members

1. From within the team, click the **Team members** tab and then click **Add Team Member**.

![Figure 24](image)

2. Click in the **Search for people to add** box and enter the recipient’s email address or full name. The name will appear in predicative search. Click on the name or press **ENTER** to add the recipient. Continue to add additional group members in the same manner.

![Figure 25](image)
Adding a Space to a Team

When adding additional spaces to a team, team members must join the spaces within the team. They are not automatically added to the space.

1. From within a space, click the **Spaces** tab and then click **New Space**.

![New Space](image)

*Figure 26*

2. Give the space a name in the **Enter space name** box and press ENTER. The space will appear under the **General** space for the moderator.

3. The space will appear under **spaces to join** for Team members.

![Spaces to Join](image)

*Figure 27*

4. To join a space, click on the space and then click **Join Space**.

![Join Space](image)

*Figure 28*
About the General Space

The General Space is automatically created when a team is created. You cannot delete or rename the general space. This space keeps track of activity within the team. This includes things like when a team member or space is added or deleted. You can use the General space for a couple different things:

- **Announcements area** – share important information as read-only messages. Only the moderator will be able to post, start calls schedule meetings or create whiteboards in this space. This will prevent others from deleting important messages or from posting information incorrectly.
- **Water Cooler area** – use the space for casual chat about non-specific topics. Team members have the choice of turning on @notifications or turning off notifications all together. What to use the General space

Making the General Space an Announcements Area

1. Click the General space within a team.
2. Click the i and choose **Turn on announcement mode**.

![Figure 29](image)

3. A confirmation box will appear, click **OK**.
4. To turn off announcement mode, click the i and choose **Turn off announcement mode**.

**Note:** This can only be done by the Moderator of the space.
Identifying the Difference Between Personal, Group and Team Spaces

After creating a variety of spaces, it may be difficult to identify the difference between these spaces in the Spaces view. Here are some tips:

- **Personal Spaces** – The other person you share the space with always identifies the space name.

  ![Christine Tennies](image)

  Figure 30

- **Group Spaces** – The name of space is on a single line.

  ![Webex boards discussion](image)

  Figure 31

- **Spaces within a Team** – The name of space is on the top line and the name of the team is beneath it.

  ![OTS and Campus news items](image)

  Figure 32

Roles of Space Members

There are different roles that team members possess including moderator, member or external participant. These roles are explained below:

- **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 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.

The Moderator (and what they can do) Privileges in Group Spaces
Assigning a Moderator to a Group Space

As defined above, group spaces do not automatically have moderators. However, this role may be assigned. The first one to assign themselves this role will be the moderator and have all the powers around it.

1. Click on a group space.
2. Click the i and then click **Moderate space**.
3. Click **Yes** to the confirmation box.
4. Once the moderator is assigned, no one else can make themselves the moderator. However, the moderator can assign this privilege to someone else.
Making Someone Else Within a Group Space a Moderator

If you are the moderator of a group space, you can then make others group members a moderator.

1. Click on a group space.
2. Click on the **Activity Menu**.

![Figure 34](image)

3. Click on the **People** activity circle.

![Figure 35](image)

4. All the members of the group space will appear.
5. Right click on the space member and then click **Assign as Moderator**.

![Figure 36](image)

Removing Moderator Status from a Group Space Member or Members

You can remove moderator status from only one designated moderator or all moderators at one time.

**Remove Moderator Status from all Moderators**

1. Click on the space.
2. Click the **i**.
3. Click **Remove moderators**.

![Figure 37](image)

4. Click **Yes** in the confirmation box.
Remove Moderator Status from an Individual Moderator

1. Click on the Activity Menu.

![Figure 38](image)

2. Click on the People activity circle.

![Figure 39](image)

3. All the members of the group space will appear.

4. Right click on the space member and then click Remove as Moderator.

Removing Space Members from a Group Space

If a group space has a moderator assigned, only that moderator can remove space members (and of course, a space member can always remove themselves from the space). When there are no moderators assigned to a group space, anyone can remove a space member.

1. Click on a group space.

2. Click on the Activity Menu.

3. Click on the People activity circle.

4. All the members of the group space will appear.

5. Right click on a space member and click Remove from Space.

Moderator Privileges in a Team

Assigning Additional Moderators to a Team

As defined above, whoever creates a team becomes the moderator. Additional moderators may be appointed though.

1. Open the team.

2. Click on Team members.

3. Right click on a team member.

4. Click Make Moderator of team.

![Figure 40](image)
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**Note:** Right click on the team member and click **Remove Moderator of team** to revoke the privilege.

**Removing Team Members**

As the moderator, you have the ability to remove team members from a team. You can remove a team member from the entire team or on a space by space basis.

**Removing a Team Member from the Team**

1. Open the team.
2. Click on the **General** space.
3. Click on **Team members**.
4. Right click on a team member and click **Remove from team**.
5. Click **OK** to the confirmation box. They will be removed from the team and every space in the team.

![Figure 41](image1.png)

**Removing a Team Member from a Space within a Team**

1. Open the team.
2. Click on a space within the team.

![Figure 42](image2.png)
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3. Click on the **Activity Menu**.
4. Click on the **People** activity circle. All the members of the group space will appear.
5. Right click on the space member and then click **Remove from Space**.

![Figure 43](image)

**Notifications**

How you set your notifications determines when you get alerted about new messages in Webex Teams. You can manage your notifications to avoid becoming overwhelmed by too much information.

**Note:** You can set global notification settings which affect all spaces. You can also set notifications by space. Both options will be covered in this manual.

**Changing Global Notification Settings**

You can turn notifications on or off for all spaces or choose to be notified only when you are mentioned in a space. This can be done globally through Settings. Please note, that even if you turn off notifications, there are a variety of icons and text that appear on a space that give you details about the messages you are seeing.

1. Click the **Status/Preferences** icon and then click **Settings**.

![Figure 44](image)

2. Click **Notifications** in the left navigation.
3. Under **Spaces**, choose one of the following:
   - **All Messages** – This is the default setting. This means that you will receive a notification of any activity in any space that you are a member of.
   - **@Mentions only** – You will only receive a notification when you are specifically mentioned in.
   - **Off** – You will no longer receive notifications for any space that you are a member of.

![Figure 45](image)

4. Under **Scheduled Meetings**, you have choices separately pertaining to notifications for scheduled meetings. Choose one of the following:
   - 5 minutes before start time
   - 1 minute before start time
   - At start time
   - Off

![Figure 46](image)

5. After making your selections, click the **Save** button at the bottom of the box.

**Setting Notifications on a Space by Space Basis**

You may set custom notifications on group spaces. You cannot set custom notifications on personal spaces. You can mute personal spaces though.

1. Click in the space and then click the **i** icon.
2. Click **Notifications**.

![Figure 47](image)
3. Under **Custom**, choose one of the following:
   - **All messages** – You will receive notifications for all messages in this space.
   - **@Mentions** – You will only receive notifications when you are mentioned in this space.
   - **Off** – You will not receive any notifications.

   ![Custom Notifications](image)

   **Figure 48**

4. After making your selection, click **Save**.

   **Note**: It is recommended that globally you choose **@mentions only** and then turn on **All messages** on a space by space basis. This will decrease the number of notifications that you receive but will also allow you to see all notifications in spaces that are active projects or high priority spaces.

**Muting a Personal Space**

1. Click in the personal space and then click the **Information** icon.
2. Click **Mute notifications**.

   ![Mute Notifications](image)

   **Figure 49**

**Status Indicators**

You can see other people's status in the Webex Teams app. If you need to contact someone, check to see if they are actively using the app. This makes it easy to know if others are available to respond to messages.

Webex Teams shows you status information by adding details to people's profile pictures:

- **Green border** - active in the last 10 minutes.

  ![Active in the Last 10 Minutes](image)

  **Figure 50**

- **No border** - active in the last 24 hours.
Turning on Do Not Disturb Status

1. Click your profile picture.
3. Choose from one of the four options available.
4. A moon will appear over your profile picture.

Making a Video Call

Calls can be made with an individual in Webex Teams whether you have a personal space with them or not. If you do not have a space already created, after making a call, a space is automatically created.

You can also call everyone in a space.

Calling from an Existing Personal Space

1. Find the personal space in the Spaces area in Webex Teams by scrolling through the spaces.
   - OR -
   Click in the Search box and type the full name or email address of the person you wish to call. The name will appear in predicative search.
2. Hover over the profile picture and an information box will appear.
3. Click on **Call**.

![Figure 54](image)

4. Click **Start with Video**.

![Figure 55](image)

5. The recipient’s device will ring and a dialog box will appear with the following options:

![Figure 56](image)

   a. **Message** – The call is declined and the Webex Teams personal space pops us giving the recipient the option to type a message.

![Figure 57](image)
b. **Decline** – Recipient refuses to start a call.

c. **Answer** – You will be connected to the call with audio and video capabilities.

---

**Calling from a Group Space**

1. Click on the space.
2. Click on the **Activity menu**.
3. Click on the **Call** activity circle.
4. A **Start The Meeting** window will appear. Click **Start With Video**.

![Figure 60](image)

5. Recipients will receive a banner notification in the lower right hand corner of the screen notifying them of the call. The recipient may click on the banner and then **Join with Video**.

![Figure 61](image)

6. As recipients join, you will see their name appear under **In Meeting** on the right navigation. You will see their video. The current speaker will become the prominent video.

![Figure 62](image)

**Turn Off Video and Audio**

Your audio and video are automatically shared during a call.
1. Click the **Mute** button to turn off audio. Click it again to turn it back on.

![Mute button](image)

**Figure 63**

2. Click the **Turn off video** button to turn off your video camera. Click it again to turn it back on.

![Turn off video button](image)

**Figure 64**

### Adding Someone to the Call

You can add people to a call or meeting that is already in progress. The person is invited as a guest and will not be added to the space. You will be able to share your screen or application with them; however, they won’t be able to see any messages or shared content, including whiteboards or files within the space. You can add people who are new to the app, but you will need their email addresses, and they will need to register before answering. The person you invite gets an invitation to join the call and can join or ignore it.

1. From within an existing call, click the **More** button.

![Add guest button](image)

**Figure 65**

2. Click **Add guest**. Type the guests email address. Predicative search may bring up the guest if they already have the Webex Teams app and you can click on their name.

![Search for guest](image)

**Figure 66**
3. The guest will receive a message asking them to **Join as a guest** or **Ignore**.

![Figure 67](image1.png)

4. If the guest clicks on **Join as a guest**, they will receive another message informing them that they will need to wait to be let into the meeting.

![Figure 68](image2.png)
5. A message will appear in the meeting space that the guest has accepted and is waiting to join the meeting.

![Figure 69](image)

6. Click in the dialog box on **1 person is waiting to join**. They will appear under **Waiting to Join**. Click **Let in**.

![Figure 70](image)

### Scheduling a Meeting in Webex Teams

#### Schedule a Meeting Using Outlook

When creating a meeting in Webex Teams through Outlook, Webex Teams automatically addresses the meeting invitation to all group members. You can add or delete members from the invitation.

1. Click on the space.
2. Click the **Activity Menu** and then click **Meetings**.

![Figure 71](image)

3. Select **Schedule a meeting**. The **Quick schedule** dialog box will open. Click **Open** to launch Outlook.

![Figure 72](image)
Webex Teams opens a calendar invite in Microsoft Outlook that automatically includes email addresses for everyone in the space. Notice that the **space name** is the **Subject**. And **@webex: space** is in the **Location** field. The invite also includes a link to **Join Webex Teams meeting**, and a video address so people can join from any standards-based video system or numbers to **Join by Phone** only.

![Calendar Invite Example](image)

**Join Webex Teams meeting**

**Join by Video system**

88834454752@meet.ciscospark.com

---

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---

5. Specify a **date**, beginning and ending **time**, and other details you need to include.

**Note:** You may add or delete email addresses to the invite. If you add a guest (someone is not a group member), you will be notified that they are waiting to the join and you will have to let them in the meeting as well. The guest will not have access to the space.

6. **Send** the meeting invite.

7. The meeting will be show up as a banner in Webex Teams. This is a clickable link that may be used to begin the meeting. It will show up in your Outlook calendar as well.
Conducting a Webex Teams Meeting

Anyone in a space can begin a Webex Teams Meeting that was scheduled. The first person to click the Start Meeting button will begin the Webex Team Meeting.

1. Click on the banner within the space to begin the meeting.

![Figure 74]

2. When the dialog box appears, click Start Meeting.

Mute Yourself or Others in a Webex Teams Meeting or Call

You can mute yourself or others so that everyone can concentrate on what's being discussed.

1. To mute yourself, select Mute at the bottom of the meeting window. You know it's working when the button turns blue.

![Figure 75]

2. To mute someone else, click the Activity menu and then choose the People activity circle.

![Figure 76]

Right-click the person's name and then select Mute. You can also click on the mute icon beside the person's name. If you want to unmute yourself or others, select Unmute from the menu when you right click on the person’s name.

Note: If you are using the Web version of Webex Teams for Web, you can mute yourself but not others.

Sharing Content

You can share everything on your screen during a meeting or call, or you can share just a single application, such as an email or document that you're working on. When you start sharing, you'll see indicators at the top of the screen or app to let you know what's being shared. If someone else starts sharing their screen and you want to go back to what you were sharing, you can use the resume option.
1. During a meeting or call, select the **Share screen** icon.

![Figure 77](image)

2. Choose which screen or application you want to share.

![Figure 78](image)

**Note:** If you don't see the app you want to share, just scroll to see all your open apps.

3. A red border and banner reading **You are sharing Screen X** will appear around the screen you are sharing.

4. Select the **Stop** icon to stop sharing your screen.

![Figure 79](image)
Recording a Webex Teams Meeting

Recordings are helpful for people who can't attend the meeting or for those who want to later refer back to what was discussed.

1. Click the More button and select Start recording.

2. Recording in Progress will appear on your screen and then disappear. A small recording icon will appear in the upper right hand corner.

3. Click the More button to Pause or Stop the recording at any time.
4. If the recording is paused, you will see the **Paused** Icon.

![Recording is paused](image)

**Figure 83**

### Navigation while in a Meeting

1. **Open the Webex Teams space during a meeting** – Click the **hamburger** icon in the left hand corner to reveal the team spaces. You will be in the space that relates to the current meeting. Here you can perform any functions that you normally would in a space. This includes writing a message, attaching a file or screenshot, etc. The meeting will continue and you will see the webcam images in the middle of the screen.

![Navigation](image)

**Figure 84**
2. **Return to full screen meeting view.** This icon is located in the upper right corner of the webcam view. Clicking on this takes you back to full screen view of webcam images.

![Figure 86](image)

**Figure 86**

3. **View Files within a space while you are meeting in.** If you want to see a file such as a meeting agenda while in a meeting, click the **Activity** menu and then click the **File** activity circle. Only the files within the space will appear on the right hand side of the meeting. Click the **X** to close this panel down.

![Figure 88](image)

**Figure 88**

![Figure 89](image)

**Figure 89**
4. **View who is and is not in the meeting.** Click the **Activity Menu** and then click the **People** activity circle. The pane on the right will designate who is and is not in the meeting. Click the **X** to close this panel down.

![Figure 90: People activity circle](image1)

![Figure 91: People pane](image2)