Connect with Webex

Basic

Quick Reference Guide

MOMENTUM

T E L E C O M

CONTENTS

GET STARTED WITH CONNECT WITH WEBEX

About This Guide

The information in this guide focuses on how to do things within the Webex Basic desktop application. Similar instructions may be used if you are working in the online Web version or the Smart Device applications (for iOS or Android). You can do some things exactly the same way no matter which application version you use, but some tasks have slightly modified steps and there are some tasks that are best completed or must be performed in the desktop application.

First Time Upgrade from Mobility to Webex

An Upgrade Notice email will be sent by your Administrator provides access to the **User Activation Portal**

Make sure to sign out and close your Mobility app(s) as well as any Webex accounts you may have.

1. Click the link in the email communication from the Admin to access the User Activation Portal and follow the prompts.

Enter your current UCOne|Mobility credentials

Enter your complete work email address when prompted

The system sends a Verification link to the email address you just entered

2. Complete the Email Verification steps by clicking the **Join Now** link you received - the system will validate and then provision, and then the page will refresh to offer the download options, then download and install the Connect with Webex application.

Click Join Now in the email you receive from the system

Wait while the system validates the email and provisions your upgraded account

Click the **Download for Windows 64 bit** button to begin the installation.

3. Launch the New Connect with Webex application and Sign In using your email and the same username and password credentials you always used.

Click the Sign In button
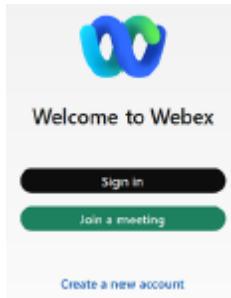
When prompted, enter your work email address

Enter your Mobility Username and Password

Welcome to Webex

Sign in
Join a meeting
Create a new account

Sign in

Start by entering your email address

Email address

Next

Enter your username

Username
Password

Submit

Welcome to your Webex!

All   Direct   Spaces

Madeleine Lelievre

Patrick Higgins

Carin Smith

Webex space for Katie

Create a space
Start a group conversation with others.

Name the space (required)

Add people by name or email

Create   Close

Call settings   Call pickup

START WORKING IN CONNECT WITH WEBEX

Your organization's Connect with Webex subscription means you already have a licensed account and can install and start using the application right away. If you do not have an account yet, or you are unsure about your status, contact your organization's applications Administrator or the Service Provider to learn next steps.

When you sign in for the first time, you will be guided through some tips and instructions for using the app.
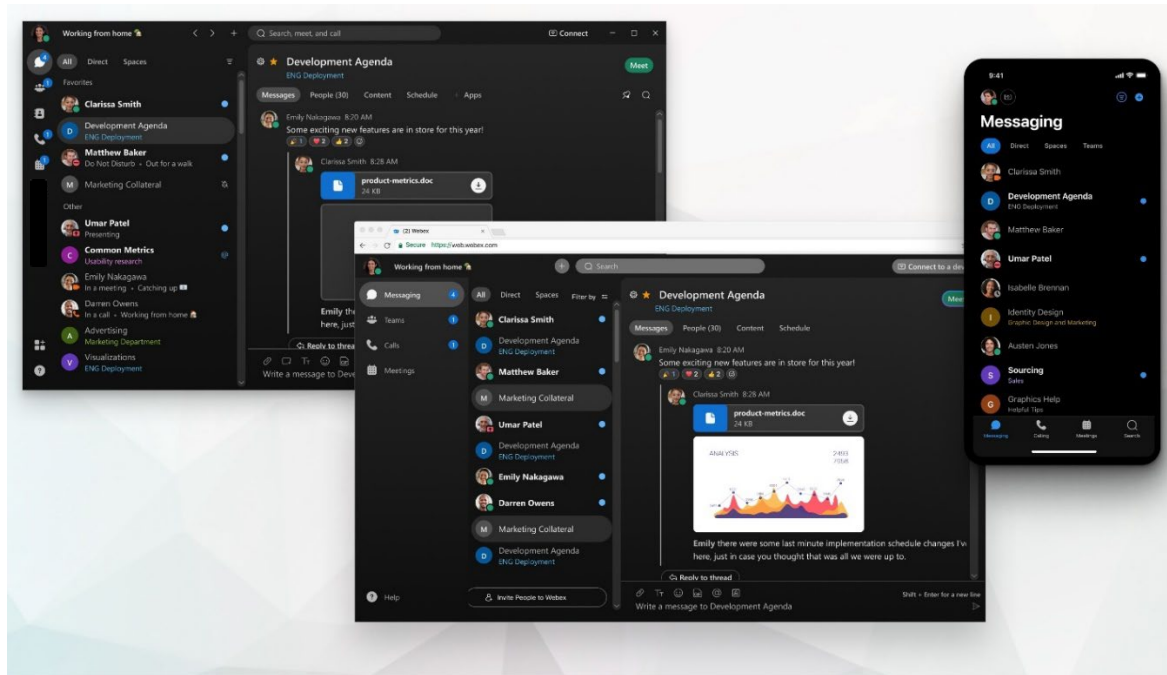
Webex Documentation

All Webex documentation is available online. This site offers a fast and easy way to get answers, tips, and training on your Webex features and tools. You have links directly to this online help right from your Webex app. Here are some direct links to useful online Webex App Help and documentation, as well:

Getting Started With the Webex App   Messaging

Teams and Spaces   Contacts

Calling   Voicemail

Meetings   Personal Insights

Find Help and Get Answers in the Application

The first thing you should know is there **is** abundant help, and you have access to answers and Webex education tools right from your new Webex application.

Webex offers comprehensive documentation and help that is available 24/7 at the click of your mouse.

Simply click on the Help button toward the bottom of the application in the left navigation panel and select the Help Center option.

That action opens a web browser directly into the *Webex Help Center* site where you can find detailed instructions, tips, training, videos, and much more – any time you need it.

You will never be without help, training, or just more information whenever you want it.
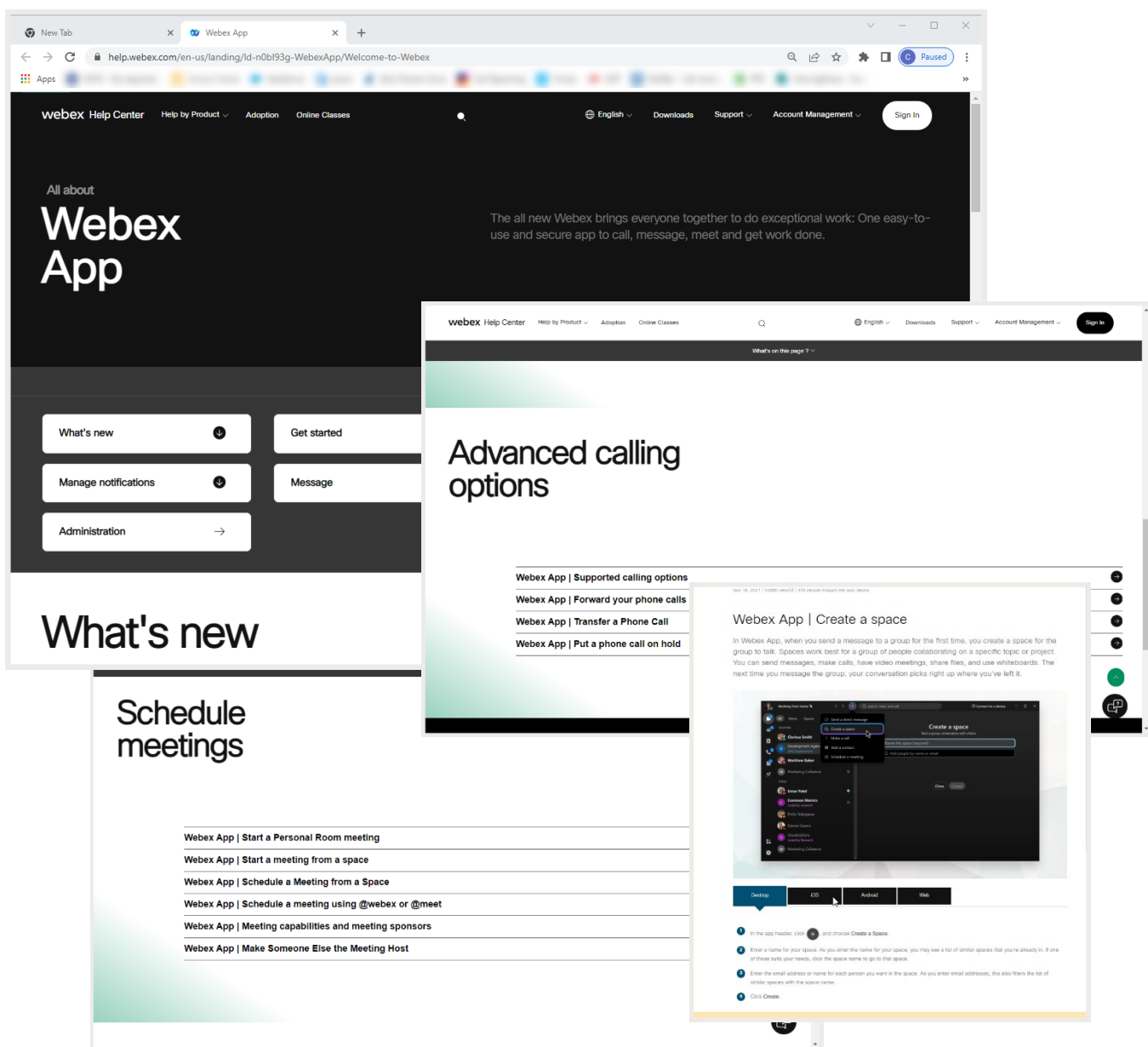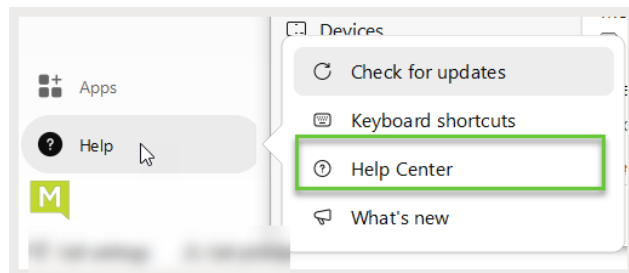
Training - Webex GoLearn Courses

After you have enabled your account, you can also check out the GoLearn.Webex site and look for User courses.

This is the new learning and training course site offered by Webex and it is filled with useful information for users.
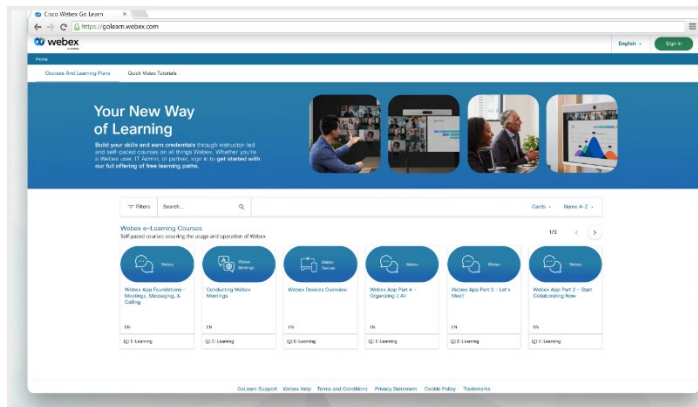
Personalize Your Connect with Webex

Make the Webex App 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.

Add Your Profile Picture

Note: Once you upload a profile picture it can only be replaced by another picture.
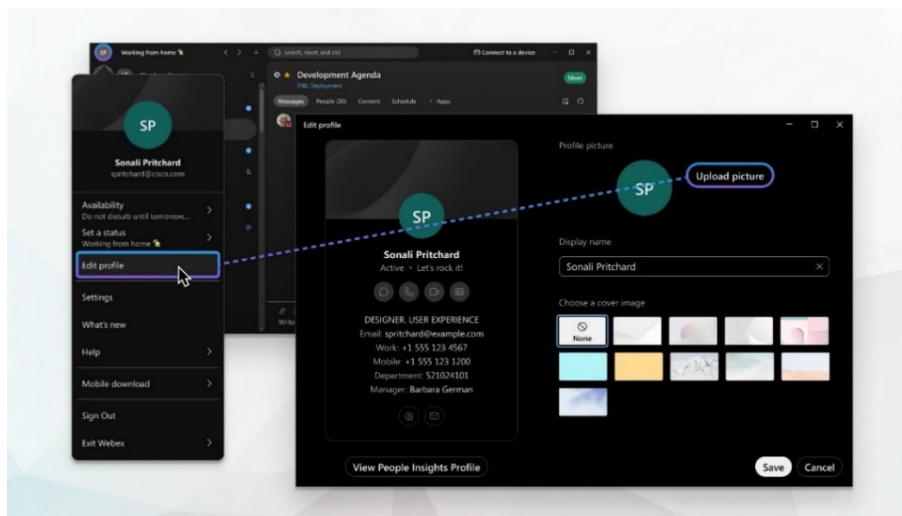
1. In the app header, click on your profile icon. If you have not already added a picture, your initials display.

2. Click Edit profile, then go to the Profile picture section.

3. Click Upload picture to browse for a picture to upload.

   If you already have a profile picture, click Change picture to change your current picture.

4. When you have made your changes, click Save.

Change Your Display Name

You can change your display name for your Webex App profile to your preferred name. For example, if your name is Jennifer, but most people know you as Jenny – you can change how it displays and make it more 'You'.

Note: If you cannot change your name, check with your organization's Administrator because the organization has likely set it that way on purpose.
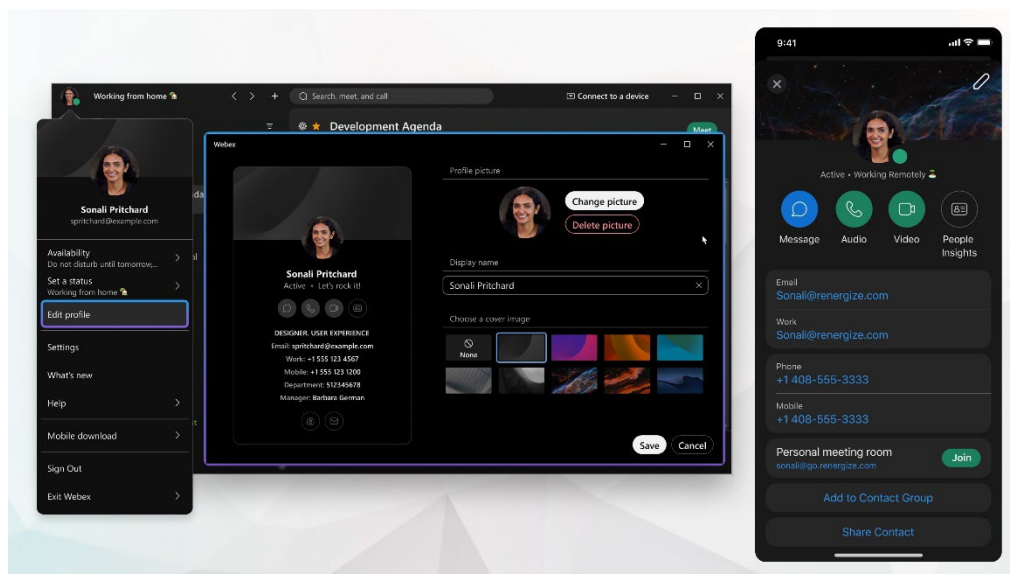
1. Click on your profile picture/icon.
2. Click Edit profile and go to the **Display name** section.
3. Click on the Name field and make changes.
4. Click Save to update Webex.

Change the Color Theme

You can choose a different color theme to personalize your Webex App experience. Each available theme uses a different color palette that can completely change the app's overall appearance and experience.
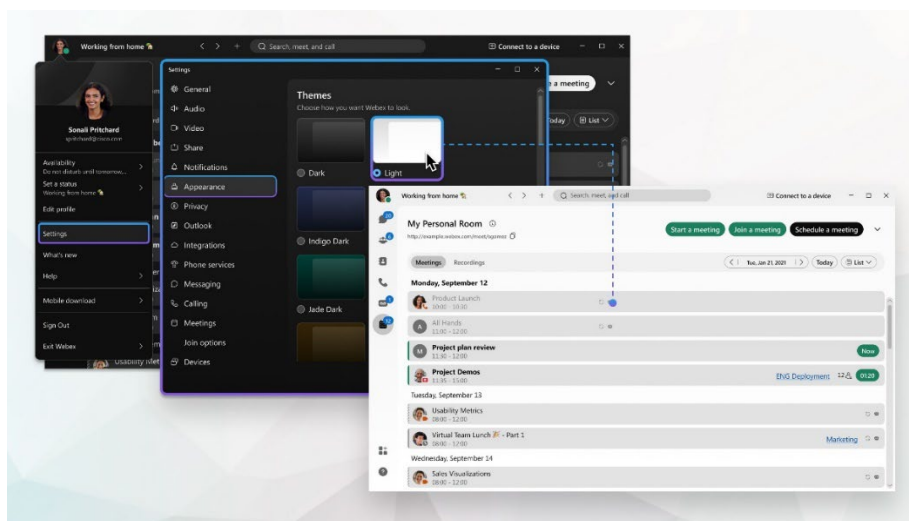
Note: In Windows or Mac, when you set an OS high contrast setting and in Connect, the Connect with Webex App will note that setting change and show the high contrast color palette that was selected.
You can take the app out of high contrast by selecting a different theme from the list. If you restart or exit the app, it will remember the last theme you had selected prior to enabling your OS high contrast setting.

1. Click your profile picture, and then select **Settings** > **Appearance**.

2. Choose a theme and click **Save.**

3. Click **Restart Webex** to apply the changes now, or click **Later** to apply the changes the next time you open the app.

Set a Custom Status

Create and share any status you want, so your colleagues know what you are up to and how quickly you can respond to messages. You can change your status to be something more descriptive. If you have to step out for a bit or you are 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 do not want to be disturbed. You can also make up a custom status, so people know what you are up to.
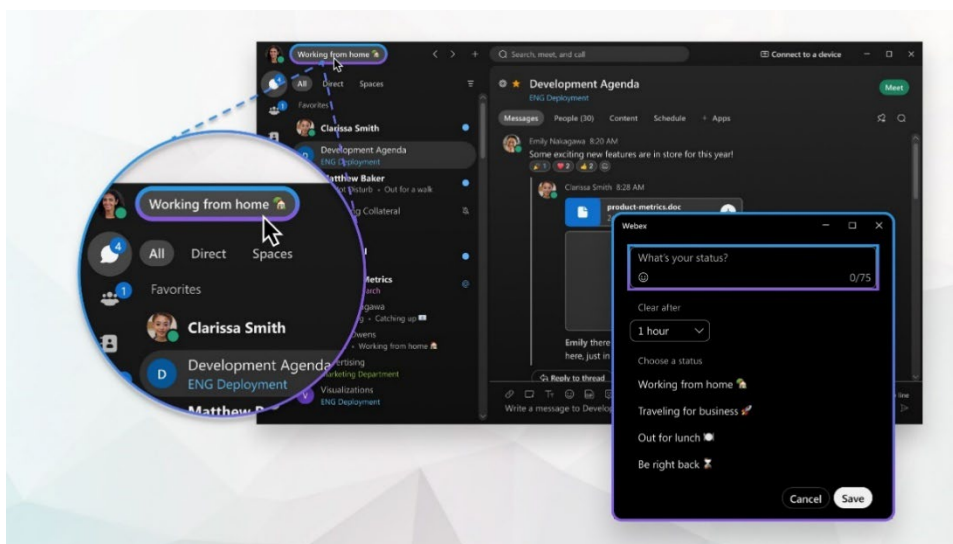
1. Click on Set a Status in the app header.

2. Select a status from the list or enter your status in the What's your status? field.

3. You can add up to five status options to the list, so they are quickly available later.
   Each status has a maximum length of 75 characters and can also include emojis.

4. In the Clear after drop-down, choose from the following:

   - Select when you want your status to clear, by choosing a time from the list.

   - Click Set a time, to choose a specific date and time.
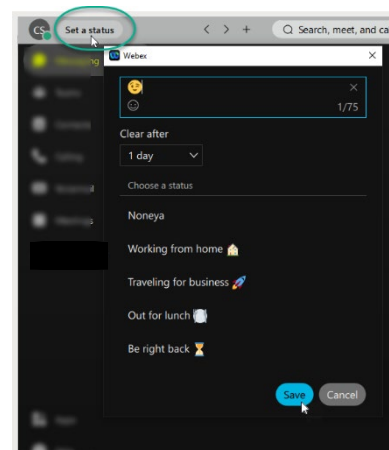
You can set a status for a maximum of 7 days, or a minimum of 30 minutes.

5. Click Save.

6. You can always click Clear to remove a selected status.

Decide What is Important Information for You

Right away, you will be notified about all messages coming your way. Work smarter by keeping track of what is important to you. You can play around with your Notifications settings until you figure out what works best for you. For example, you can set it up so that you are only notified when you are **@mentioned** in any space or when any message gets posted in your *most important* spaces. And if you are not interested in a particular space, you can always leave it or hide it by right-clicking on it to choose what works for you so that you are no longer notified about messages posted to that space and it does not show up in your Spaces list.
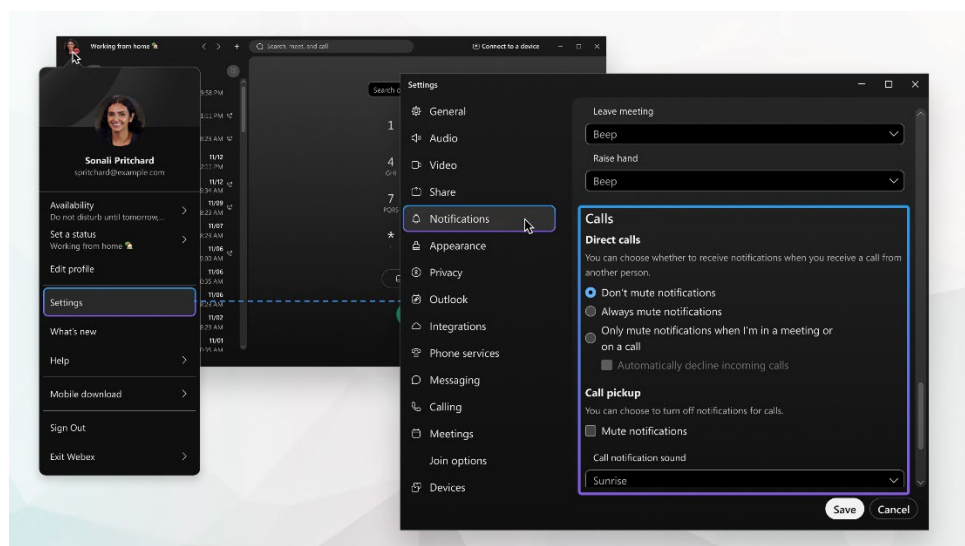
You can also see other people's availability so that you can find the right time to connect with them. For example, if you see a green circle around someone's profile picture, it means they have been using the app within the last 10 minutes, so chances are, you will get a response if you reach out.

On the other hand, if you see someone does not want to be disturbed, you might want to wait before reaching out.

Let People Know When You Are Busy

If you need some time to work without getting message or call notifications, you can set your Webex **Availability** to **Do Not Disturb (DND)**. This updates your status in Webex so that other users can instantly see that while you *are* working, you would prefer not to be interrupted on Webex.
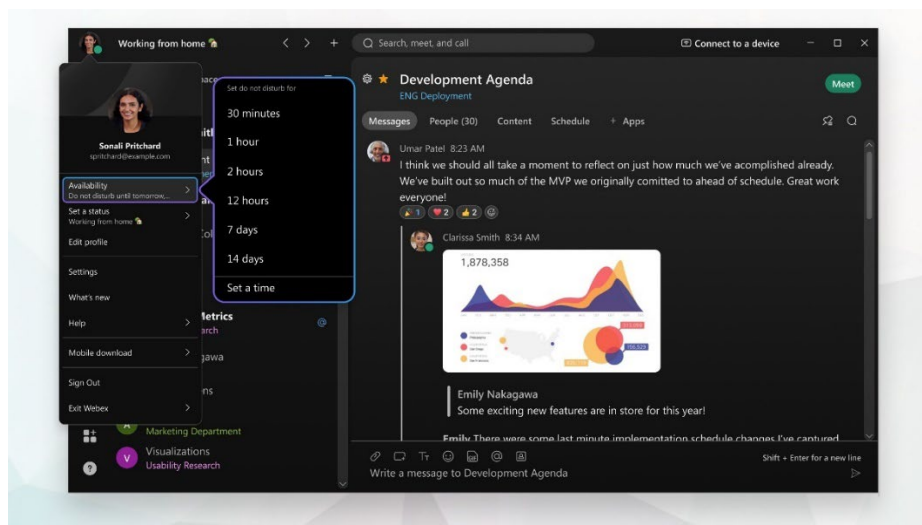
Note: People can still send you messages while you are in Webex DND mode… however you may not see the notifications that typically pop up when you are Available. Your unread messages always have useful indicators, so you can still locate the messages you have not yet reviewed.

1. Click on your profile picture and select Availability.

2. Choose from the following:

   - Select the length of time DND will be turned on from the listed options, or

   - Click Set a time to define a specific end time *Today* or *Tomorrow* and click Save.

3. To change your availability back to active, click Availability > Clear, so that people know they can contact you again.

   Also:

   - If you are set up with a calling service and also do not want to be notified about calls on your mobile app or desk phone, you need to turn on DND in your Call Settings in the Advanced Call Settings section in Calling settings.

   Tip: If you turned on DND in your calling settings, make sure you go back and turn it **off** there as well, so that you can resume getting phone calls on all your devices when you are again available.
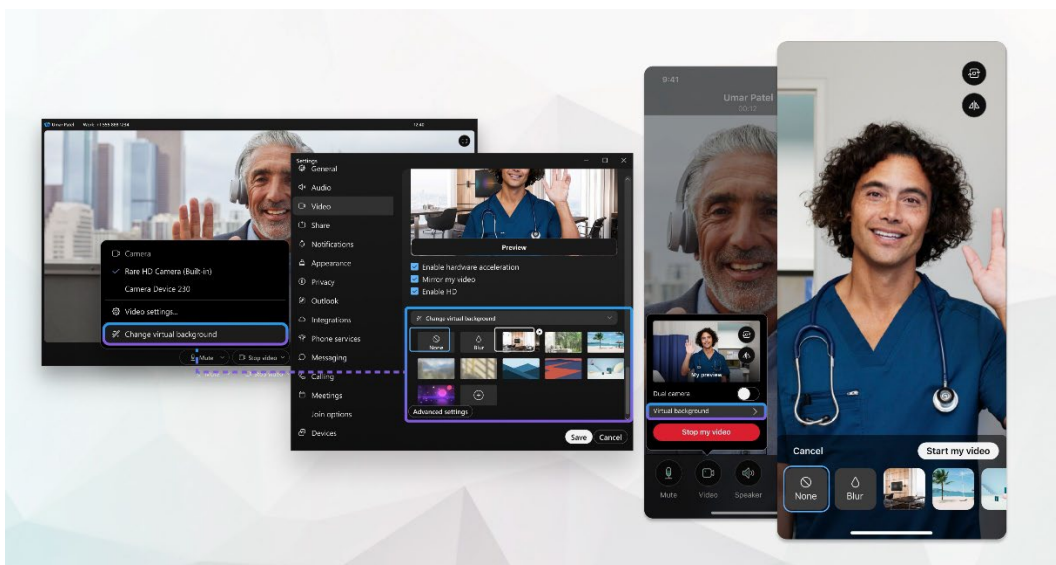
Show When You're Out of Office

When you have to leave the office for an appointment or when you go on vacation, you can let others know through your Webex App status in case they want to contact you. You can only see your out of office status in the Webex App when the following are true:

- When you set your automatic replies for out of office in Microsoft Outlook **or** the out of office or vacation reply in Google Calendar.

- *This is not the same as choosing Out of Office when you schedule an appointment or meeting*.

- When your Outlook or Google calendar is integrated with Webex App.

If you are unsure about your setup, contact your administrator for help.

Go to Microsoft Outlook or Google Calendar to set you automatic replies. Your status in the Webex app automatically updates within 20 minutes and then your avatar displays with an out of office icon.

People in your organization will see your out of office status indicator:

- When they @mention you.

- When they see your name in the space list.

- Under your name when they message you directly.

- When they see your name in a space's People list.

- In the results list when they search for your name.

- In the Personal Insights

View People Insights Profile

This information can be made private. You can change your settings to hide your people insights information from other users. Your organization determines your level of access to change the data in the profile.

1. Go to Avatar > Edit Profile

2. Click on View People Insights Profile.
   An new dialog displays to show what is on file for your People Insights information.
   Tools to assist in your review of this information are provided, including:

   - **Refresh** - Top right - updates to show changes.

   - More. - Click to see options to:

     Edit (click to modify name or phone information. Note: access to this may be turned off by your organization). The Edit Profile button below also offers access to perform this task, if authorized.
     Wrong Person (click if this is not your account information)

     Hide Profile (while data is still processed in the background, other users will not see your people insights profile information.)

3. Click on the Exit icon (top right) when finished changing People Insights Profile settings.
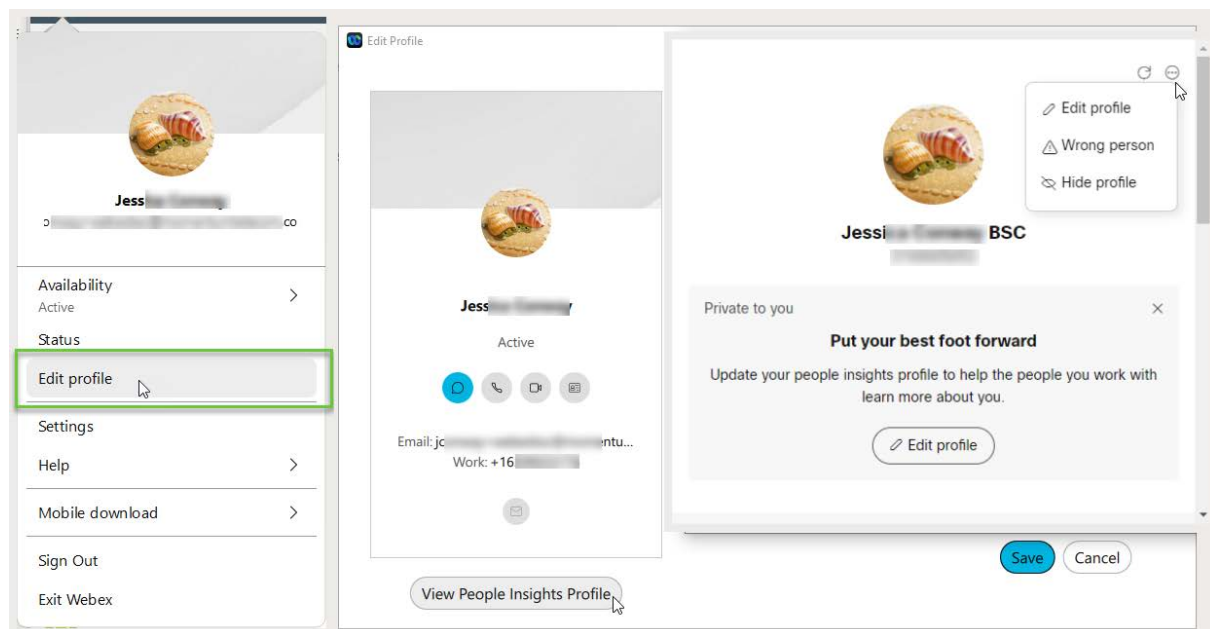
Stop Sharing Your Status

If you do not want people to see whether you are currently using your Webex App, you can turn off your status indicator. However, while this is in effect, you also will not be able to see other peoples' current status until you turn the status back on.

1. Click on your Profile Picture and then click on Settings > Privacy

2. Under Availability and status, uncheck the ☐ Show availability and status check box.

3. Click **Save** when finished.
   Tip: You can also specify individual people with whom you do not want to share your status by using the **Hide my availability and status from another person** tool in Settings > Privacy.

START WORKING WITH OTHERS IN CONNECT with WEBEX

When you start a conversation with someone, it creates a space between you and the person (or 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.
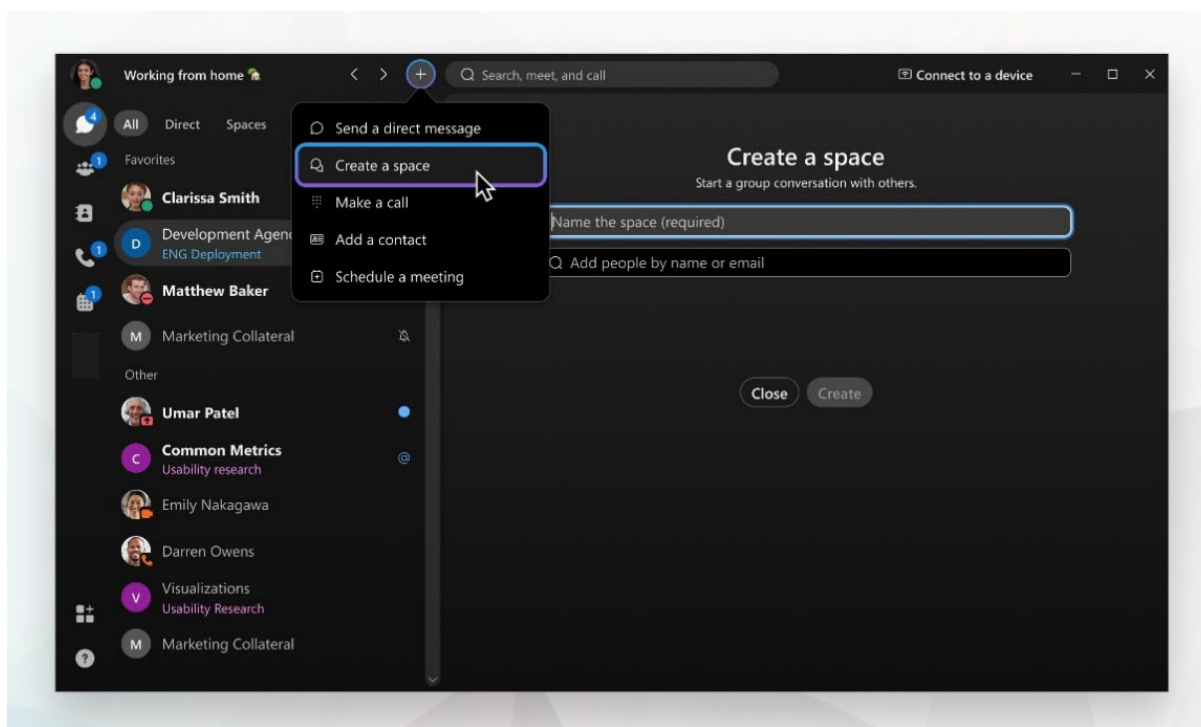
Messaging

In the Webex App, all your discussions and a lot of your work can take place within spaces and teams in your Messaging section. Here you can send messages, make calls, have video meetings, and share files and whiteboards.

You can send a message directly to one person. The conversation that you started remains between the two of you, and you can't add other people to the conversation later.
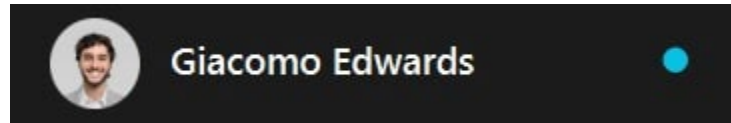
Start a Conversation with Someone

When you send a direct message to a person for the first time, you create a conversation just between the two of you. The next time you message that person, your conversation picks up right where you've left it. Your messages can include a maximum of 5400 characters. (For comparison, this paragraph has about 340 characters!)

1. In the app header click ➕

2. Select Send a direct message and then enter the persons email or name.

3. Then, just type and click ▷ to send your message.

4. The next time you message them, you can just select their name from the **People** filter or your Messaging list.

SMS Messaging

SMS texting from Webex is an add-on and requires a license to use. If you receive a notification that you do not have this license, contact your administrator.

To enable SMS text messaging with Webex once you have a license, you will need to add the MOBot to your Webex.

Add SMS MOBot to Webex

1. Click on Messaging

2. Go to the Webex space for <Your Name>

3. Click on the People tab

4. Click on the **+ Add People** option or the Add People button.

5. Input the following: **MomentumBot@webex.bot**

6. Select it when the Bot displays right below the text field.

7. Click the Add button when ready.
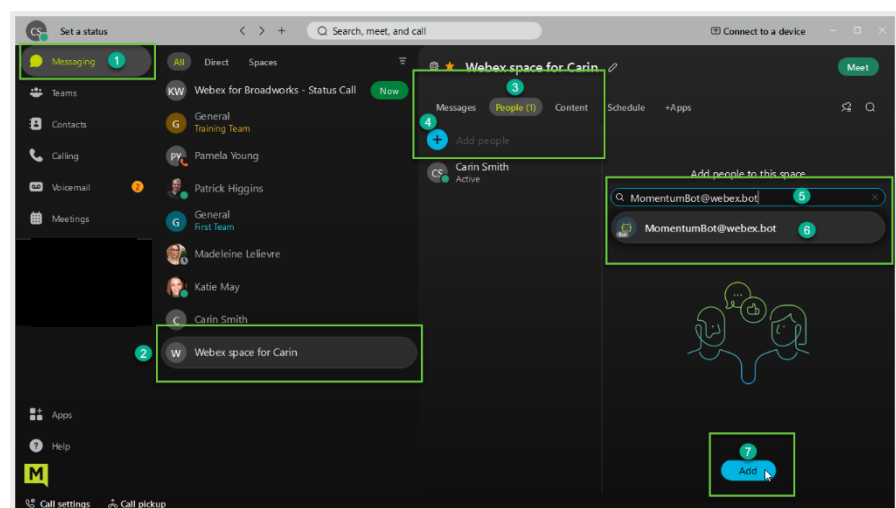
Send SMS Messages via MOBot in Webex

1. Click on the **+** symbol in the Webex App toolbar.

2. Choose Send a Direct Message.

3. Search for MOBot in the search field and select MOBot when it displays.

4. In the chat to MOBot, type the word **Text** and hit enter.

5. Then enter the 10-digit Telephone Number you wish to send an SMS message to with a 1 in front.

   Example: 18885383960

6. Click Submit. A new Space with that Telephone Number (TN) is created in your Messages list.

7. Select that Space.

8. In the chat space, type @MOBot (do not add any spaces) and press Enter.

9. Type the message you would like to send to this number and press Enter.

Spaces

Spaces work well for a group of people working on a specific topic. You come together to handle this *thing* (which can be something quick or long term), but the focus is more narrow and more specific. You could also hear these referred to as *standalone spaces*.
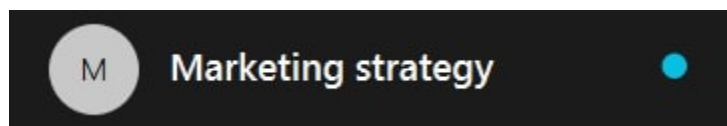
You can join a space if you receive a notification that someone who is already in the space adds you to it.

Spaces start out unmoderated, which means anyone can do things like send messages, share files, schedule meetings, make calls, send GIFs, and so on. You can have spaces that are just chats with one other person, spaces with lots of people in a group chat, and one that's part of a larger team, like a break-out group on a Team.

When you message someone directly, you are creating a 'space' just between the two of you, and no one else can join that conversation – unless you invite them. If you need to communicate with more people about a specific topic, you can create a space where you can all work together. If your scope expands from that space's original intention, you might need to build a Team and then move the Space into that team.

Add People to a Space

You can add people to an unmoderated space or a space you moderate. You can select people from your organization or enter the email address(es) of people from outside your organization that you want to invite. Each space can have a maximum of 5,000 people in it.

1. Go to **Messaging** 💬, select a space, and then click **People**

2. Click **Add people** ⊕, type the first letters of their name or their email address, and pick them from the list. If you selected someone that you do not want to add to the space, click their profile picture to remove them

3. You can add up to 30 people at once by pasting a list of email addresses from your email application. Just copy the recipients list for an email and paste that list in the **Add people to this space** field.

4. Click Add to add your selected people to the space

5. Once you add someone to a space, they receive a notification that they were added.

   If you cannot add someone to a space, it could be because the space is moderated. Ask a Moderator.

Roles On Spaces

Space Member

When you belong to a space that is not moderated, you're all members of the space with the same privileges. You can create a space, add and remove people from the space, and change the space name.

Space Moderator

You can moderate your Spaces.

Change the Space Name and Pictures

You can change a space picture from a round icon with the first letter of the space name, by uploading a picture for the space. Or, if you change the space name, the icon letter changes too. You can also add a cover image to the space, to add a personal touch. You can make changes to any space except the General space for your teams. And any member can change these details unless the space is moderated, then it must be done by a moderator.

Leave a Space

If you do not need to be in a space anymore, you can just leave it. When you leave, a little note lets the other people in the space know that you decided to leave the conversation space.

Note For Moderators: If you are the last moderator of a team (group) space, the option to 'Leave' the space is disabled. You must first either un-moderate the space or promote someone else to moderate it.

- In the space, click Space Information ⚙ and select Leave.
- You can also right-click on the space's name in your spaces list and then select Leave.

Meet with Space Members

While viewing your Space, click on the green Meet button on the left side of the window.
This opens the dialog for starting an ad hoc meeting.
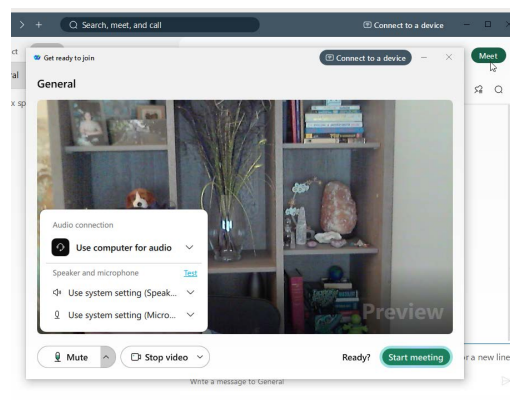
Teams

If your original intention changes and a project outgrows its original purpose in a Space or chat, you can create a team and then move a space into a team .
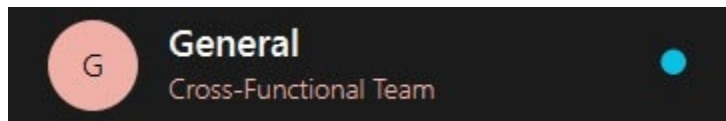
Teams help you keep everything organized by putting multiple spaces under a common theme. Teams are great for a consistent group of people who are going to be working on *something* for a long time. That *something* can involve many activities or could be sub-projects happening at the same time. To join a team, a moderator must add you to it.

Manage Your Teams and Projects

Now that you have learned the basics of using Webex App, you're ready to start creating spaces and teams to help your teams work together more effectively. Learn about the differences between spaces and teams and some tips for organizing your teams.

When your team starts working in Webex App, you should take time to think about how best to structure your teams and spaces. If you take a systematic approach, you'll likely find it easier to control your workflow and better support your team. You can establish common processes, make decisions, build common knowledge, and facilitate your team culture.

Follow Your Company's Guidelines

Your company might already have specific guidelines that you should follow when creating spaces or teams. For example, managers might be expected to have a space dedicated to their direct reports, or an entire technology group might have a team that everyone gets added to automatically. So, if you are in a position to create new spaces and teams for your co-workers to work together, check first for your company's guidelines. Since most people will be working in multiple spaces and teams at a time, following similar guidelines makes it easier for everyone.

Create a Team

You will generally create teams for one of two reasons - if you have a specific communication structure in mind for a large project or group of people, or if you have grown out of a space that you created and need to coordinate with other groups in other spaces. **Teams are simply a collection of related spaces.** They are great for a consistent group of people who are going to be working on *something* for a long time. That

something might be complicated and involve a lot of activities or sub-projects happening at the same time. And you can create a different space for each piece of the puzzle to help that *something* get done.

Perhaps you manage a team of about 10 people in the Finance department of a large company. Once your team is using the app, you can create a team called "Finance." When you create a team, you become its [moderator](), and everyone you add is a team member. They will be automatically added to the team's General Space, which is the default space, and the only one that the team members you invite get added to automatically.

1. Go to the 👥 Teams section and click on **+Create a Team**.

2. Enter a Name for your team (required) and a Description (optional) when prompted.

3. Add people to your team by entering their name or email address and selecting the correct person in the results list – repeat as needed until all the people you need on the team have been selected.

4. Click **Create** when finished to build your team and invite those people to it. Your Teams section updates to show the new team in your list.

Organize Your Teams

In Webex App, teams help you keep everything organized by categorizing multiple spaces under a common theme. For example, you may have a team for a large project that includes cross-department members all working together on specific pieces of the project.

Tip: When you are creating a team, you can also select an emoji and add it to the name.
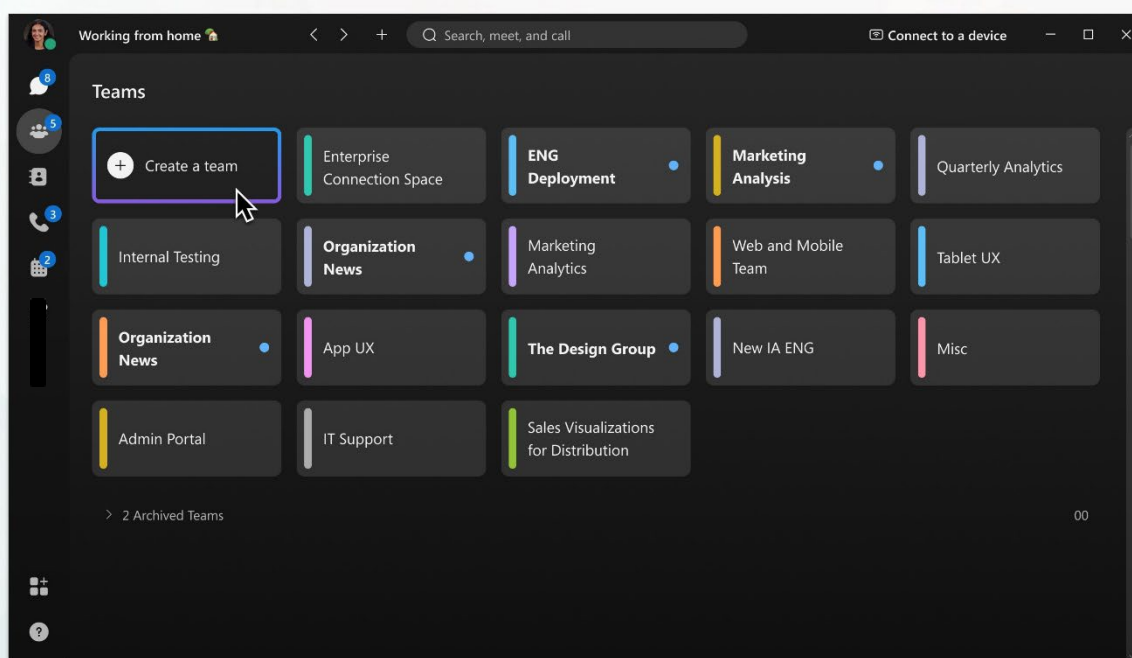
How you structure your team is the key to your team's success.

Add Spaces to a Team

You can use Spaces in your team as a way of sharing knowledge and keeping people on task.

Everyone you invite to the team can see the available team spaces and Join on their own.

If you want your team to use certain naming conventions or follow guidelines when creating team spaces, be sure to let them know what you expect.

Manage Team Space Settings

While viewing the Space:

1. Click on the Settings gear icon next the space name.

2. Define the general setting options.

Edit Space Settings

Click this option to upload an avatar, change the name and choose a cover image for the space. Click Save when finished.

Copy Space Link

Click this option to save the link to your clipboard to make is easy to copy/paste to someone.

Notifications

Click this option to define space notifications for the members in the space. Options to select from include: Global (all messages) Custom (choose specific notifications, turn all off, or even turn off notifications and hide the space from the list and searches.

Add Apps

Click this option to open a browser window to review available 3rd party applications that can be added to the space for use by members. Note: App usage is considered an optional customization and support may not be offered by the service provider if an app is added and then creates performance issues.

View Space Policy

Click this option to see how data is stored for the space, and for how long.

3. Define Moderator Setting options (where available for editing).

Disable/Enable @mentions to all

Click this option if you wish to turn @mention usage by members either on or off.
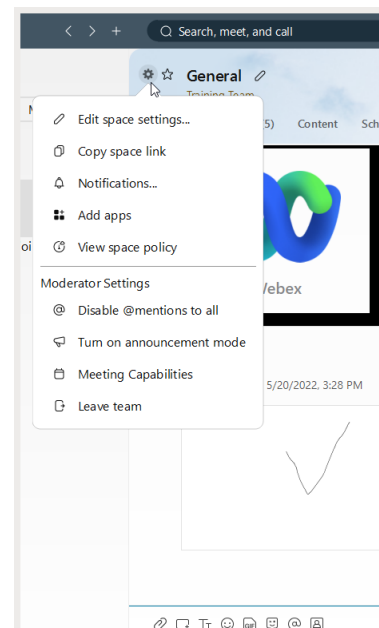
Turn On Announcement Mode

Click to enable or disable. When this is turned ON, only team/space moderators can post content, start calls, schedule meetings, or create whiteboards within the General space as defined by the Team Meeting Capabilities.

Meeting Capabilities

Click to review the team space sponsor. This is the person who created the Team space and their license level and access to tools defines the team's capabilities.

You may click the green **Meet** button to start an ad hoc meeting with the members in a space or team. All the tools you need to host and manage the meeting are provided. Or you may use the Schedule tab section to schedule a meeting with the individuals in your team or space, as desired.

Leave Team

Click this option to leave the team.

Set a Team space as a Favorite

Click the Star icon at the top of the team's space dialog to set it as a favorite ★ in your lists. Click again to remove this designation ☆.

Archive Space

Click this option if you wish to keep a space, but remove it from use, searches, or notifications. Team spaces are the only type of spaces that can be archived.

Restore a Space
1. Go to Teams and choose the team where the space was initially created.

2. Under Archived spaces, choose the space and then select Make Active.
   Once reactivated, team members can go back to using that space just as they did before.

Roles On Teams

What you can do in spaces in the Webex App can vary, depending on your role. You might be moderating a team for one project and be listening in as an external participant on another. The people in these roles do not need to be part of your organization; external users can take on any of these roles, too.

External Participant

You can participate in a space even if you are not part of the same company – if you are invited. As an external participant, you will not be able to see or join other spaces on the team – only the one you were invited to. The administrator may also keep you from changing certain space settings, but you can participate as a member of the space, sharing your expertise on one aspect of a larger project.
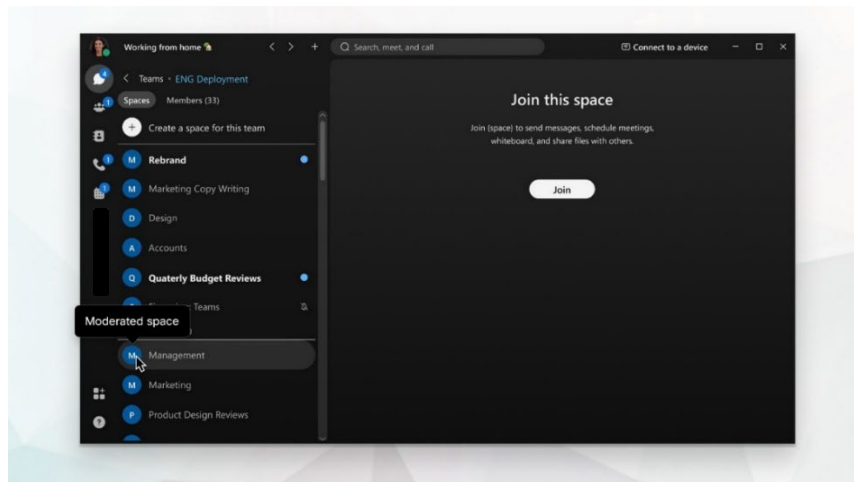
Team Moderator

If you created the team, you are the team's moderator. You 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 home space – by default this is called General .

Team moderators can also assign themselves as moderators to any moderated spaces in their teams. Team moderators can self-join any space and promote themselves to moderate that space. You can also make other people on the team moderators so they can share these responsibilities with you. So, even if you have not created the team, you might still be a moderator.

Team Space Moderator

If you moderate your space or create a team from a space, you can moderate it and see useful moderator settings for the space.
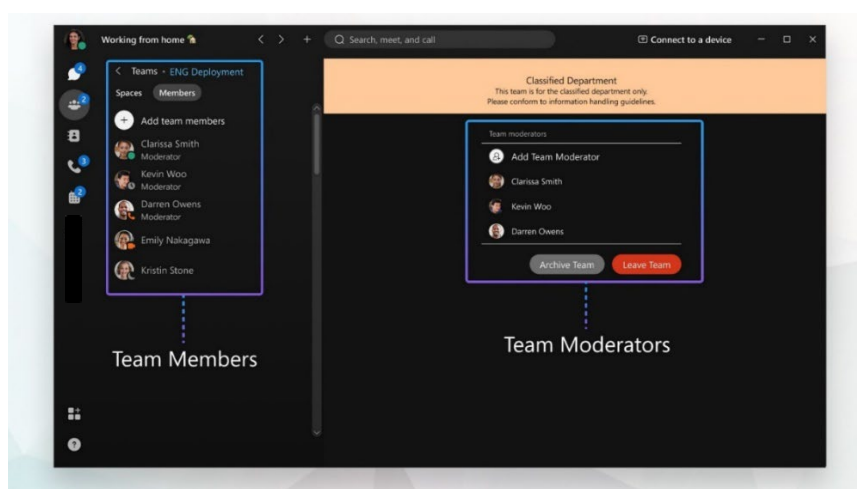
Team Member

If a moderator adds you to the team, you are automatically added to a team space called **General** . 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. But 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 will not be able to see or join other spaces in the team. Your administrator may keep you from changing certain space settings , but you can participate as a member of the space, sharing your expertise on one aspect of a larger project.

If you subscribe to Webex from your Service Provider, your Provider's Customer Support Team serves as your administrator. Please contact them to assist you with your settings.

Moderate Team Spaces

If you are able to moderate a space in a team, you control when spaces are available and who belongs to them. This gives you control over who sees the content in the space. This is useful, for example, when you are a moderator providing sensitive or confidential information to a targeted group of people. You can block this sensitive information from other people in your team who do not have the required permissions.

When you create a team, you are a Team Moderator, and you control the spaces and members of your team. Team moderators can also assign themselves as moderators to any moderated spaces in their teams. Team moderators can self-join any space and promote themselves to moderate that space. They can also assign other space moderators, who must be members of the team.

Anyone on the team can create a team space and can choose to moderate the space. They then become the moderator of that space. Other team members cannot self-join and need to ask the moderator to join.

Add More Moderators to a Team

As the creator or moderator of a Team, you can also assign other moderators to the team to help keep the team members list up to date, or to update the team details.

1. Go to the Teams section and choose the team.
2. Select Add Team Moderator and enter the person's name.

    You can also right-click on someone in the Team Moderator list to remove them, when necessary.

Archive a Team Space

Open the team space that you want to archive, go to Space Information ⚙, and then select Archive space.

Remove People from a Team

Windows users - Go to **Teams** 👥 , choose the team, and select Members. Right-click on the name of the person that you want to remove and select Remove from team. Then, select OK.

Mac users - Go to **Teams** 👥 , choose the team, and select Members. Then, click More **. . .** beside the person's name that you want to remove and click Remove from Team.

Contacts

Webex app makes it easy to connect with the people that you contact the most. You can create a Contacts list, add up to 500 contacts of your choosing (including contacts that are local to your device), and then group them and customize the contact information. You can use the quick access **+** icon in the toolbar and select Add a contact, or simply click on the Contacts menu button in the left panel to open that section and start creating and manage contacts
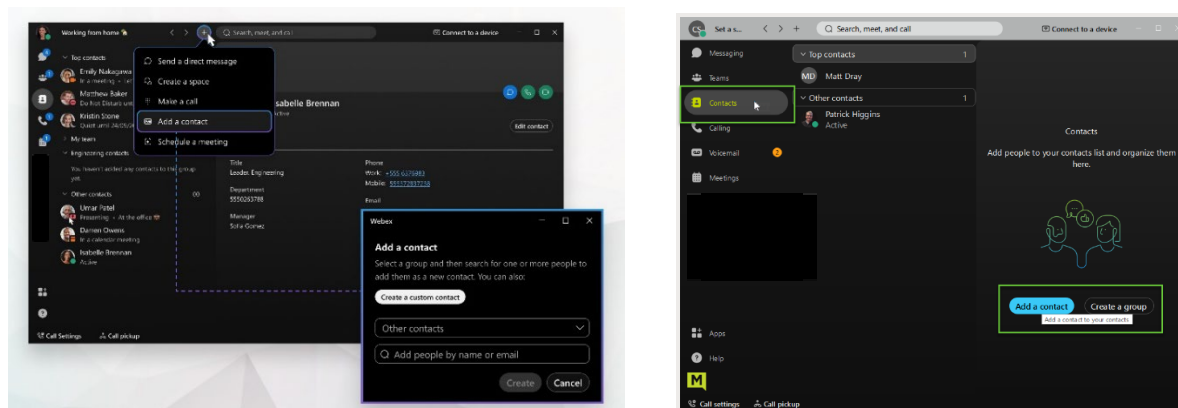
When you search for someone in Webex App, your search automatically includes your local Outlook contacts (Windows) or local address book (Mac) too, so you can easily find people not yet using the app and make a call. You just need to give the Webex App permission to access your address book if you are using a Mac.

1. Go to 📇 , and select Add a contact or click ➕ in the app header, then select Add a contact.

    - You can also right-click at the bottom of your **Contacts** list or within a space with another person from your Spaces list and select Add to contacts from there.

    - In Webex App for Windows, you can also right-click on a person's name in Search results and add them as a contact from there.

2. Choose one of the following options:

3. Enter the person's name in the Search field, click the drop-down list to either assign the person to a default group (Top contacts or Other contacts) or Create New Group, and click Add.

4. If you are creating a new Group, give the group a name and then click Create.

5. Click Create a custom contact, enter the person's information, and then click **Save**.
    Custom contacts can be used for things like your favorite pizza parlor. Once created, you can call and order pizza directly from Webex App

The person now appears in your **Contacts** list 📇 under the appropriate group as you specified, and you can send them a message or call them. You can add them to more groups by right-clicking the contact, choose Copy to group, then select the new group you want them to be in, as well. You can even **_Move_** the contact to another group. If you want to add extra phone numbers or a SIP address to one of your saved contacts:

1. Open the contact

2. Click Edit contact ✏️

3. Click Add another phone number. You can add multiple entries, and they will appear as calling number options to choose from the next time you place an audio or video call to your contact.

Calling

The calling section of Connect offers tools specifically for making calls or reviewing call history.

If you have connected to a device (like a desk-phone) you have the option to use the device to dial out (the phone will ring, and you will pick up the desk phone to connect the line you dialed) or you can choose to do so directly from your Webex application on your computer using either audio or video calling.

Supported Calling Options By Product

In Webex App, you get assigned a calling option that works best in your organization or for your individual needs. So, when you make a call from the app, your calling experience depends on your account settings.

You can make a call from many different places in Webex App. Just look for the [icon] Audio

or **Video** [icon] call icons whenever you are [sending a direct message](#), looking at a [contact card](#), or entering a name, email address, or video address into the Search bar.

- If you do not see the option to make a video call, it could be because your administrator only wants you making audio calls.
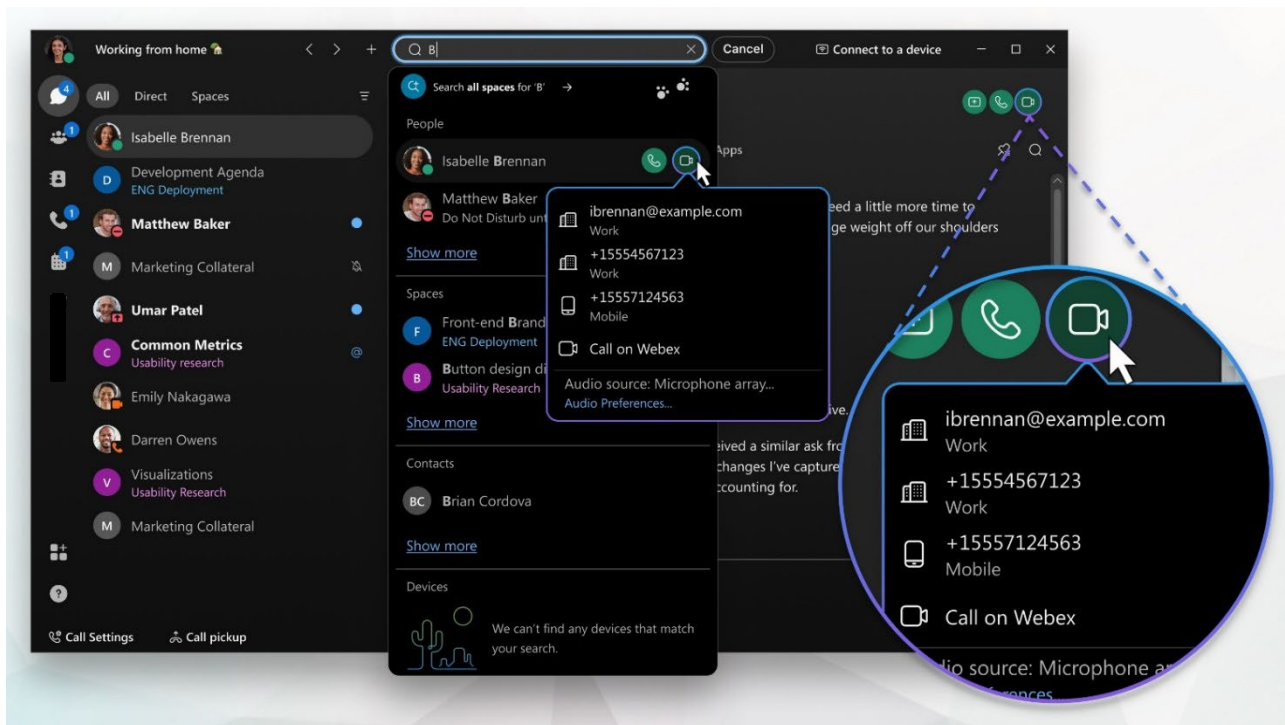
Calls on Webex App

Anyone with a Webex App account (on desktop, mobile, or web) can call anyone else with a Webex App account. It does not matter whether they are part of the same organization or what type of calling service they use.

You do not need to use their phone number; you just need to be connected to them in the app to call or answer calls from someone with a Webex App account. In-call options can include adding guests to the call, sharing your whiteboard, and sharing your screen.

After reviewing the final marketing plan shared in a direct message with a vendor, for example, you can call the vendor immediately to let them know about the last-minute logo change.

You can also manually enter a video address (SIP address) in the search bar if you want to call a non-Webex App user with an address or dial into a meeting bridge (such as username@example.webex.com.)

Call Phone Numbers within Your Organization

Your administrator might set up your account so that you can call someone in your organization (work or mobile number) and answer their calls too. Click your manager's phone number and have a face-to-face call right over Webex App to let them know about the success of your marketing plan.

With this setup, you get access to more calling features (on desktop and mobile), depending on which calling option your organization chooses.

Call Anyone with a Phone Number

If your organization is using Unified CM or Webex Calling, you can also call anyone with a phone number or answer calls from anyone calling your work number. When you make these types of calls, it's just like making a regular phone call from any other phone. When it is time to make reservations for your team's celebration lunch, you can call the restaurant right from Webex App too. Just go to **Calling** 📞 and enter the phone number.

Answer a Call
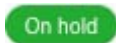
When you get a call, you get a notification that you can use to accept or decline it. The notifications appear on the devices that you use for Webex App, such as your computer, mobile phone, or desk phone. And if you use more than one, you can answer or decline the call from whichever device you prefer.

When you get an incoming call notification, choose the option that best suits you at the time:

- **Answer** — click when you are ready to answer the call. When you answer a call from another person who is using Webex App, the call starts with your video on.

- **Decline** — click when you do not want to take the call.

- **Message** — click to send a message instead of taking the call.

- **Hold meeting & answer** — you are in a Webex scheduled meeting, a Personal Room meeting, or a meeting associated with a space but want to take the call. Your video and audio are paused in the meeting until you are finished with your call. Your name remains in the **Participants** list, and you continue to see any content that's being shared in the meeting while you attend to the call.

- If you are connected to a Cisco headset, you can also answer or decline the call from the headset.

- If you are set up with Unified CM and you answer the call on your desk phone with video support, you can see the person's screen share on your phone. If your phone does not support video, you can see the shared screen on your desktop app.

Place a Call On Hold

If you are on a phone call with someone and you get interrupted with something else that you need to take care of, you can place the call on hold and resume it when you are free to talk again.

1. While on a phone call, select More ⬤ and then select Hold.

2. After you put the call on hold, your spaces list shows that the caller is on hold `On hold`.

Transfer a Call

When you are on a call, you can transfer that call to someone else.

1. While you are on an active phone call, select **More** ⬤ and then select Transfer.

2. Enter the name or number of the person you want to transfer the call to and then choose one of the following options:

    *   Consult first – (also known as a warm or consultative transfer) This option allows you to chat with the person you are transferring to before completing the transfer. If you searched for someone by name, choose their mobile or work number and then choose whether you want to make it an audio or video call.

        Note: If you choose an audio call and you wish to consult first, you can adjust your audio preferences if you need to before transferring the call. Just click Audio Preferences and make your option selections, then complete the transfer.

    *   Transfer now (also known as a cold or blind transfer) This option transfers the call right away with audio only. If you searched for someone by name rather than number, choose their mobile or work number and then continue.

3. Then, click Complete transfer, or click Resume to go back to the call without transferring it.

Park a Call

If Park lines are enabled for use on your account, you will have the option to park a call while in an active call:

1. Click on the More… button and select Park. The caller is placed on hold.

2. Enter the correct park line, ensuring that no other calls are parked on that line and submit.

Retrieve a Parked Call

Once a call has been parked on a park line, you may click the Retrieve Call button at the bottom of the Webex dialog to take the call or take the call back if you parked it.

1. Click the Retrieve call button.

2. Enter the park line extension/number and submit.

3. The call is now active on your line, and you may begin speaking to the caller.

Manage Basic Calling Settings

You can access your call settings right from Webex App.

1. You can click on the Call Settings link at the bottom of the application window and click Open Call Preferences which will open the full Settings window with the focus on the Calling settings.

   OR

1. Click your Avatar to go to *Profile and Preferences*

2. Click on Settings.

3. Click on Calling to review and edit the settings available to you.

Incoming Calls

Manage the following, as needed:

Answer Calls with my Video On

Click to place a check in this box if you wish to be on camera when you answer all of your calls. The default is set to ON.

Call Forward (Basic)

You have two options to access your basic Call Forward settings

A. Click on the Call Settings button at the bottom of the Webex dialog and use the drop-down tool to forward to Voicemail (must be set up already – see step B) or select Do Not Forward.

B. Go to the Calling Settings and use the drop-down selection tool under Call Forward to choose either Do Not Forward Calls or Voicemail. If Voicemail is selected, you may also enter a number in the text field below and use the plus/minus buttons to add or remove numbers in the field above.

   See also: Call Forwarding (Advanced)

Call Window Settings

Choose when the incoming call on your computer should automatically come to the front (in full view). Here you will choose the behavior of the incoming call toast messages and the active call dialog. You can choose to send those call windows to the front for easy viewing or *minimize* and hide the windows after you answer when calls come to your line. Recommendation is to set to on all calls.

When using this computer for calls

Use the drop-down selection tool to select either Auto-minimize calls (call window is hidden) or On all calls (keep in front and in full view). You can move and manipulate the call windows as you like while viewing them.

When using a desk phone or video device for calls

Use the drop-down selection tool to select either Auto-minimize calls (call window is hidden) or On all calls (keep in front and in full view). You can move and manipulate the call windows as you like while viewing them.

Manage Advanced Calling Settings

While working in Calling Settings:

1. Scroll down to click on the Advanced Call Settings link to open a new view.

2. Click on the drop-down arrow next to the section you want to review or edit.
   Your section options include Incoming Calls, Outgoing Calls, Voicemail, and Call Control.

3. Close the dialog when you are finished with the advanced settings.

4. Always click **Save** before leaving Calling settings if changes were made in the section.
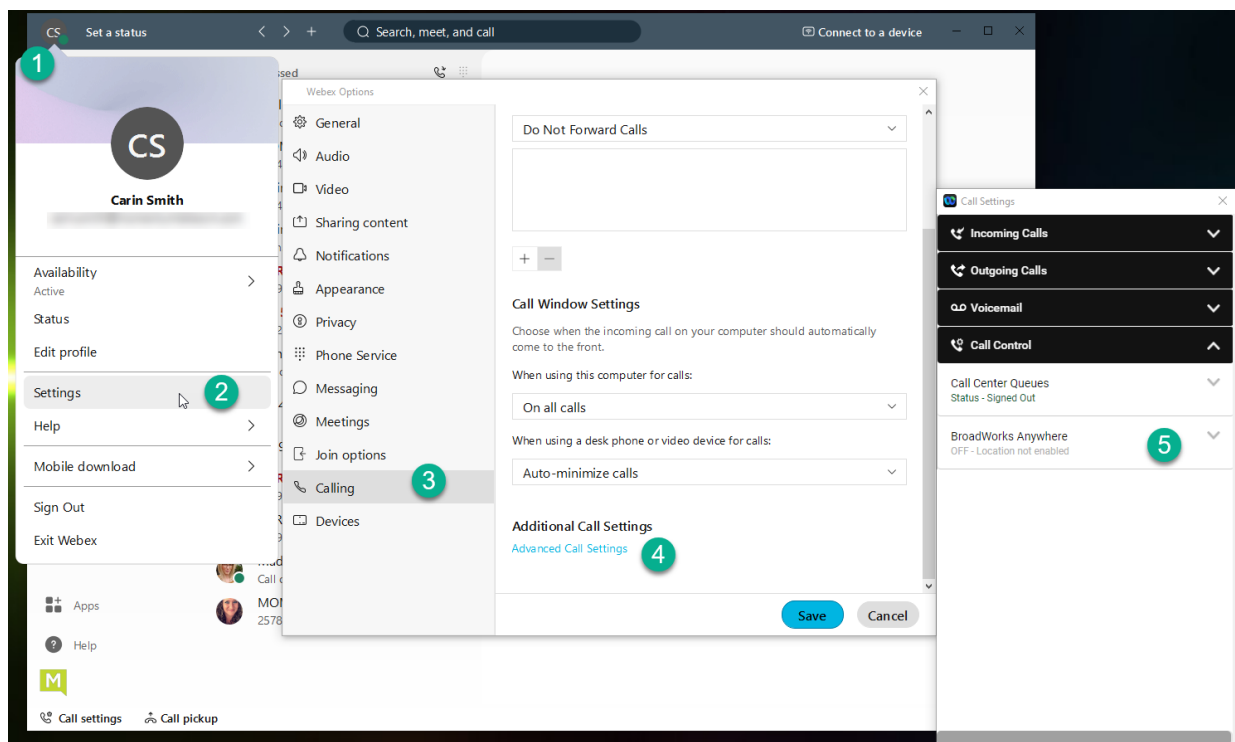
Do Not Disturb

When you are busy and do not want to be disturbed by calls, you can turn on Do Not Disturb (DND) to silence incoming calls to Connect on all of your devices and send the calls directly to voicemail.
Note: The calling Do Not Disturb feature setting is completely separate from the Do Not Disturb *availability* setting found when you click your profile picture.

While viewing Advanced Call Settings in the Webex application:

1. Click on Incoming calls and click to slide the Do Not Disturb toggle to ON

2. Click the **Exit** icon to close the Advanced Call Settings dialog.

3. Click Save to update the Calling Settings.

   Repeat to return and turn DND OFF

Reject Anonymous Calls

The Anonymous Call Rejection feature automatically rejects calls with blocked IDs or unidentified numbers.

While viewing Advanced Call Settings in the Webex application:

1. Click on Incoming calls and click to slide the Anonymous Call Rejection toggle to ON
   Repeat to return to this view and slide the toggle to turn anonymous call rejection off.

2. Click the Exit icon to close the Advanced Call Settings dialog.

3. Click Save to update the Calling Settings. Repeat to return and set Anonymous Call Rejection to OFF.

Call Forwarding

By allowing you to forward calls to a phone number other than your voicemail, Call Forwarding keeps you connected wherever you are. You can decide when calls are forwarded and to which phone numbers.

While viewing Advanced Call Settings in the Webex application:

1. Click on Incoming calls and click on the drop-down icon next to Call Forwarding.

2. Click to slide the toggle to ON for any of the following options:

   - Always - All calls are forwarded.
     If you would like to hear a notification whenever a call is forwarded, check **Ring splash**
   - When No Answer - Calls that are not answered after a set number of rings are forwarded.
     Use the **Number of rings** setting to specify how many times you want the call to ring before it is forwarded.
   - When Busy - When you are already on a call, all other incoming calls are forwarded.
   - When Unreachable - All unanswered and busy calls are forwarded.

3. Repeat to return to this view and slide the toggle(s) to off when necessary.

Sequential Ring

When Sequential Ring is turned on, incoming calls ring a set of phone numbers one at a time until the call is answered. If the call still is not answered when the sequence is complete, it's transferred to another phone number or to voicemail, depending on your settings for unanswered calls. The caller hears a comfort message during the process, so they know the system is attempting to find you. You can choose the following settings when creating a Sequential Ring list:

- Set up to five phone numbers to ring in a set order.
- Choose the number of rings before the call is transferred to the next phone number in the sequence.
- Turn on Answer Confirmation, which requires the person who answers the call to confirm that they have accepted the call.
- Choose whether the Sequential Ring list rings if you're already on a call.
- Set a schedule for Sequential Ring (for example, turn it on at weekends).
- Allow callers to interrupt the call sequence at any time and be transferred to your unanswered calls process (for example, voicemail). This option is announced before callers are transferred to the ring list.

While viewing Advanced Call Settings in the Webex App:

1. Select Incoming Calls > Sequential Ring.

2. To set up your sequential list, select Ring Numbers and enter the phone numbers in the order that you want them to be rung. For each number, you can choose how many times the call rings before transferring to the next phone number in the sequence

3. Optional, place a check next to **Answer Confirmation** Required as desired for each number.

4. Choose the following additional (optional) settings:

    - Ring Base Location First - Turn on this option if you want your base location (primary phone) to always ring first. You can choose how many times the call rings before it's transferred to the next phone number in the sequence.
    - Continue if Busy - Check Continue if busy if you want calls to be transferred to the Sequential Ring list when you are already on a call at your base location.
    - Caller May Cancel - Turn this setting on if you want callers to be able to skip the normal call sequence and go directly to voicemail.

5. Click the **Exit** icon to close the Advanced Call Settings dialog.

6. Click Save to update the Calling Settings.

Call Waiting

When Call Waiting is turned on, you hear a notification tone if another call is incoming while you're already on an active call. You can choose to put the active call on hold and answer the incoming call or you can ignore the incoming call.

While viewing Advanced Call Settings in the Webex application:

1. Select the drop-down arrow next to Incoming Calls.

2. Click to toggle Call Waiting to ON.

3. Click the Exit icon to close the Advanced Call Settings dialog.

4. Click Save to update the Calling Settings.

Block My Caller ID

If you want to hide your phone number so it does not display to people that you are calling, you can block your own caller ID.

While viewing Advanced Call Settings in the Webex application:

1. Select Outgoing Calls.
2. Click to toggle Block My Caller ID to ON to enable.
3. Click the Exit icon to close the Advanced Call Settings dialog.
4. Click Save to update the Calling Settings.

Automatic Callback

The Automatic Callback feature keeps checking busy phone numbers for you, so you can get on with other work. If Automatic Callback is turned on and you dial a busy number:

- You are offered a callback request (for example, press 1 to be notified when the line is available).
- If you accept, the phone number is continuously checked.
- When the line becomes available you receive a notification, and the number is automatically dialed for you.

While viewing Advanced Call Settings in the Webex application:

1. Select Outgoing Calls.
2. Click to toggle Automatic Callback to ON.
3. Click the Exit icon to close the Advanced Call Settings dialog.
4. Click Save to update the Calling Settings.

Anywhere Feature

Use your selected phones as an extension of your business phone number and dial plan.

While viewing Advanced Call Settings in the Webex application:

1. Click the drop-down arrow next to Call Control.
2. Click the drop-down arrow next to BroadWorks Anywhere.
3. Click to toggle Alert All Locations to ON or OFF
4. Click the drop-down arrow next to Ring numbers.
5. Enter up to two numbers that will also ring and click the adjacent toggle to turn ON or OFF for each.
6. Click the **Exit** icon to close the Advanced Call Settings dialog.
7. Click Save to update the Calling Settings.

Call Control (Call/Contact Center) Settings

While in **Settings** > **Calling** > **Advanced Call Settings**, click the drop-down arrow next to **Call Control** to manage Call/Contact Center settings for queue access and availability.

Call Center Queues

Click the drop-down next to **Call Center Queues** to sign in/out and define availability status.

Status (Queue Availability)

Click the drop-down arrow adjacent to **Status** and click on an option to update your queue availability.
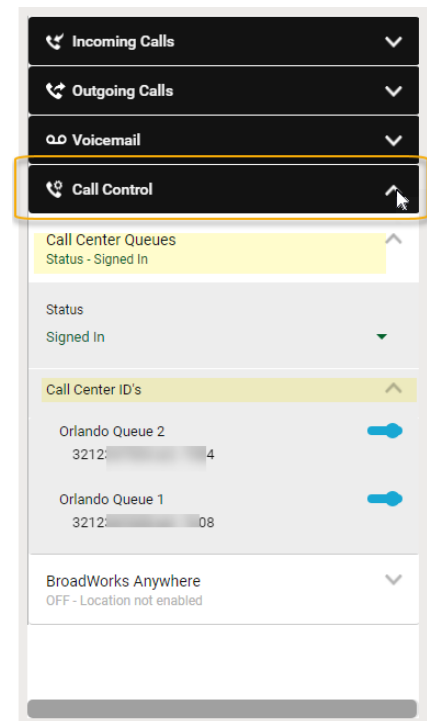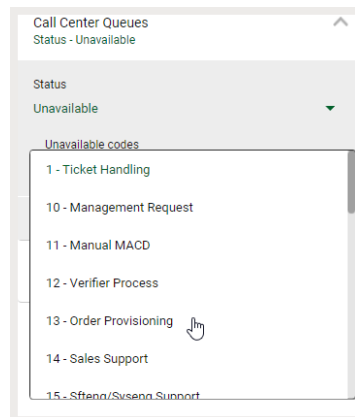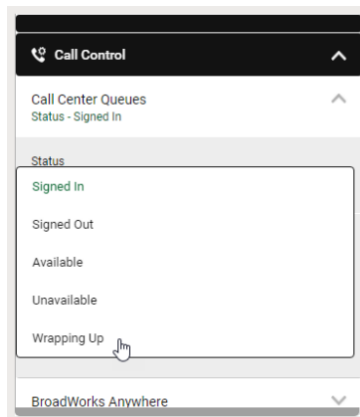
If you select **Unavailable**, a new section displays to allow selection of the correct unavailable status code.

Call Center ID's

Click the drop-down arrow next to **Call Center IDs** to toggle your assigned queues to **ON** or OFF (Active/Deactivated) – where authorized to do so by your organization.

Tip:

If you want to keep your Call Control settings available to use after each call, you can open Calling > Advanced Calling Settings and then move those two dialogs out of your way, but somewhere that is easily accessible on your desktop. Those dialogs will remain open and available to you until you close them.

Call Pickup

When your administrator makes you a member of a pickup group, you may be able to hear or see when someone on your team gets a call. If your coworker is busy, you can use Call Pickup to answer their call for them. Choose one of these options:

A. If you note an incoming phone call to a coworker's desk phone:

   1. Click on the **Call Pickup** button in the footer of your app.

   2. Click on the Pick up button to take the group call.

       OR

   1. Click the Directed Pickup option to pick up a call at a specific number by entering the phone number or extension in the field provided.

   2. Click the GO > icon or press Enter.
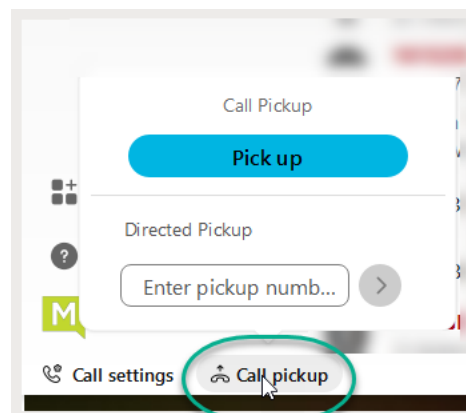
B. If you get a call notification in Webex App that a coworker has an incoming call (Group Pickup):

   1. Check the person's status on their profile picture.

   2. If they are busy or unavailable, click **Call Pickup** and then click Pick Up to answer their call.

Voicemail

You never have to worry about missing important calls. If someone calls you and you are unable to answer that call at the moment, they can simply leave you a voice message. In Webex (with calling) a red badge counter displays right next to the Voicemail section to indicate how many messages you have waiting unheard for you to review. You can then check your voicemail directly in the app, which is (of course) super handy.

Manage Voicemail Messages

You can listen to your voice messages right from the app and what you do with them after that depends on your calling service. No more overlooked voice messages in Webex App. When you have a voice message waiting for you, a badge counter (Message Waiting Indicator) displays next to your Voicemail section icon letting you know how many voicemail messages you have waiting for you. After you listen to your messages (from the app or your desk phone), the badge counter disappears. You can also return a call from the Voicemail section.

You do not need a PIN to access voice messages while you are working in the Webex App.
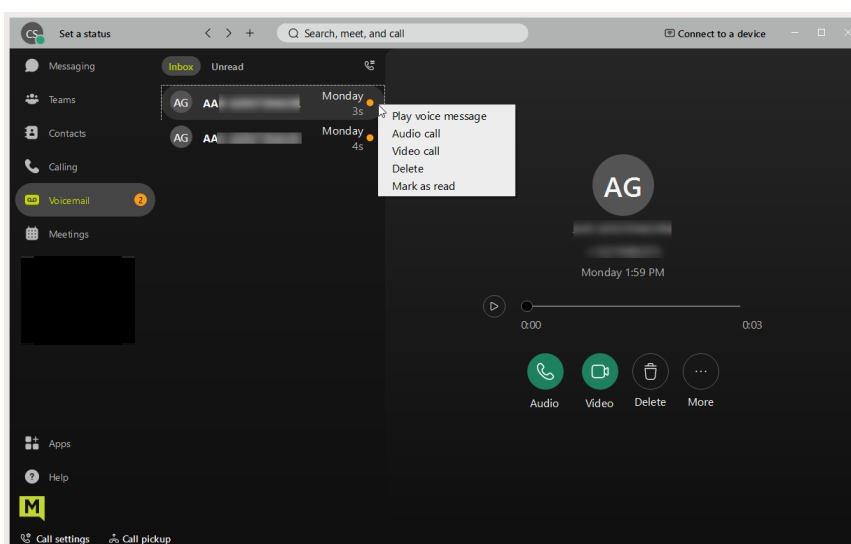
1.   Click on Voicemail

2. Choose a message.

3. Then listen to the message in one of the following ways:

    - Right-click on the message and choose **Play voice message**.

    - Click Play in the window that opens to the right.

You have a few other options at your fingertips within the app:

    - You can call the person back using Audio or Video calling

    - You can delete the message

    - You can mark the message as read (and keep it)

Voicemail Settings

At some point, you may need to make changes to your voicemail features. Typically, such tasks are performed in your Cloud Services Portal along with other BroadSoft calling features and settings on your account, or even directly on a desk phone/device – but there are some voicemail features that can also be managed from Webex, too. To review the settings for Voicemail to which you have access within Webex:

1. Click on your Avatar to open Profile & Preferences and select Settings > Calling.

2. Scroll to the bottom of the calling settings dialog and click on the Advanced Call Settings link.

3. Click on Voicemail to review the settings that can be managed here. These can include:

    - Voicemail Service: On/Off – Click to slide the toggle to turn voicemail ON or OFF

    - Send Calls to Voicemail – Click on Set settings to define when you want calls sent to voicemail (when no answer, when busy, or always) and click Ok - then select the number of rings to allow before a call is sent directly to your voicemail inbox.

    - When a message arrives: Click the drop-down to define whether the Message Waiting Indicator should be set to ON

    - Email Notification: Default OFF – Set to ON and enter the email address that will receive the notification.

    - Email Carbon Copy: Default OFF – set to ON and enter the email address that will receive the copy.

    - Press '0' to transfer (this setting option works only if configured for your organization)

4. When finished, click the Exit icon (top right) to close the *Advanced Calling Settings* dialog and then click Save in the Calling settings view to keep the changes to you just edited.

Meetings

You can schedule, join, or start a meeting from your computer, mobile device, phone, or a video system in the Meetings section. Choose the method and device app that works best for you. And once you are in a meeting, tools that make it easy to participate or host are readily available. You can mute attendees, mute yourself, share content, raise your hand, text, send emojis, start and stop your video feed, change your background, add to a whiteboard or thread, switch the meeting to your mobile Webex app, and much more.

View Upcoming Meetings on Your Meeting Calendar

1. Click on Meetings.

   The calendar view displays in the Meetings tab.

2. Calendar tools are provided to select a day, choose Today, view as a list, view the current work week, or view the current 7 day week.

3. Scroll down to view more information in the calendar and see what meetings are either scheduled, approaching their start time, or in progress now.

View Meetings in a Space

1. Go to Messaging.

2. Click on the desired Space in your list.

3. Click on the Schedule tab.

Join a Meeting

There are several ways to join a meeting…

From A Space

1. Go to the Messaging section in the Webex application.

2. Click on the desired Space within your list.

3. Click on the Schedule tab in the selected Space.

4. Click **Join** next the meeting you wish to enter.

From an Email Invite:

1. Click the Join Meeting button in the email and follow the prompts to launch the meeting, enter the requested information, and continue on to check your video/audio.

2. When ready, click the **Join Meeting** button at the bottom of the meeting dialog.

From Your Calendar

As a scheduled meeting start time approaches (15 minutes before by default), a green button titled **Join** displays next to the listing in the calendar view.

1. Click the Join button and follow the prompts to enter the meeting.

   OR - When the scheduled meeting start time arrives and while the meeting is in session, the button adjacent to the listing in the calendar view changes to display Now.

1. Click the **Now** button to enter the meeting at or after the scheduled start time.

From the Join a Meeting Button

At the top of the Meetings view there is a **Join a Meeting** button.

1. Click the button to open a dialog that allows you to search for a meeting in a personal room, by a link, by the video address, or meeting number.

2. Enter the information you have and any matching results display with a green **Join** button if they are available for selection.

3. Click **Join** next to the correct option and follow the prompts to enter the meeting.

Start a Meeting

While viewing the Meetings section:

1. Click on the **Start a Meeting** button at the top of the Meetings page.

   This opens a meeting dialog in your personal room.

2. When ready to begin, click the **Start Meeting** button at the bottom of this dialog and your meeting is underway.

Schedule a Meeting

While viewing the Meetings section:

1. Click on the Schedule a Meeting button at the top of the Meetings page.

2. Enter or select the following:

   - Topic: Give the meeting an appropriate title so attendees know why they want to attend.

   - Invitees: Use the search tool to locate and select individuals you wish to invite.

   - Date and Time: Enter the start and end times and select the date and time zone.

   - Meeting Link: Decide whether this meeting will use a one-time link or be held in your personal room.

   - Password: (Optional) Define a password if you wish attendees to enter only if they have the password you provide.

   - Description: Add information about the meeting - and agenda is always a good idea.

- Advanced Settings: Click the setting gear to view additional audio (connect type, notification tones, mute options) and scheduling (cohosting, breakout session, auto-lock soon after the start time, etc.) options. Click the back icon < at the top to return the meeting schedule view and finish.

3. Click the **Schedule** button at the bottom of the dialog when ready. With that, the calendar is updated, invitees receive an email with the meeting information, and the dialog closes.

View Meeting Recordings, Files, and Other Content

The Meeting content tab above the calendar view in the *Meetings* section displays any meeting content available from past meetings you may have attended or been invited to join. If a meeting were held in a Space, its content could be viewed in the space Contents tab, as well. Content can include recordings, messages, files, whiteboards, etc. that were created within a meeting.

Meetings Settings

To manage settings for meetings:

1. Go to Preferences > Settings > Meetings to view available setting options.

2. Then click Save to update Webex with any changes.

Settings for meetings available in this dialog can include the option to Connect to a Calendar, select the calendar you prefer to use when scheduling (Webex or your connected calendar app). You can also review your Meeting site URL, your personal Room information, and your meeting Host PIN.
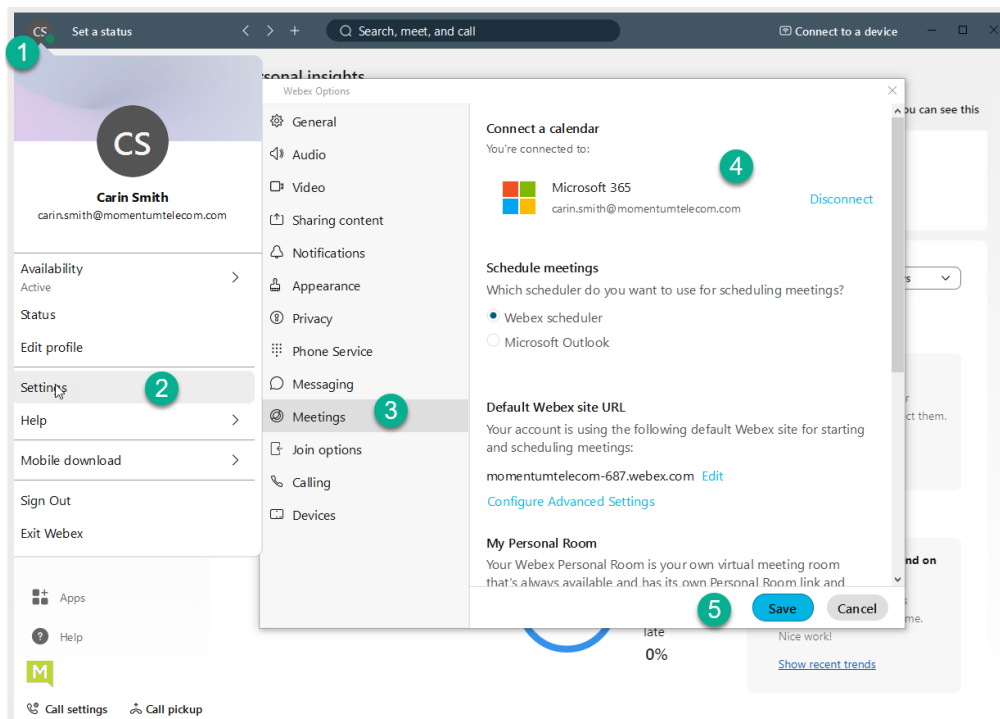
CONNECT WITH WEBEX BASIC SETTINGS

Access Settings

You can access your application Settings right from Webex App.

1. Click your Avatar in the toolbar to go to *Profile and Preferences*.

2. Click on Settings.

Or

For quick access, you can click on the Call Settings link at the bottom of the application window and click Open Call Preferences which will open the full Settings window but with the focus on the *Calling* settings.

Settings Sections

General

The General tab in *Settings* offers access to manage the following setting options:

Start Webex When My Computer Starts

Click to place a check in the box if you want to start Webex automatically each time your computer starts.

Connect Webex to Microsoft Outlook

Click to place a check in the box to allow Webex to be connected to your Outlook. Contact your organization's Administrator for assistance if you have issues getting this connection started.

Landing Screen (preference)

Use the drop-down selection tool to select the option that defines the view (Messages, Teams, etc.) you prefer to see first every time Webex opens.

Recent Sessions (activity detail log)

Review the device access history for your account by clicking on the Show Details link.

Show Floating Window for Calls and Meetings

Click to place a check in the box to automatically see a pop-over display for Webex calls or meetings in a separate mini window when other apps are in front of your Webex app view.

Always click Save before leaving the General view if you have made changes.
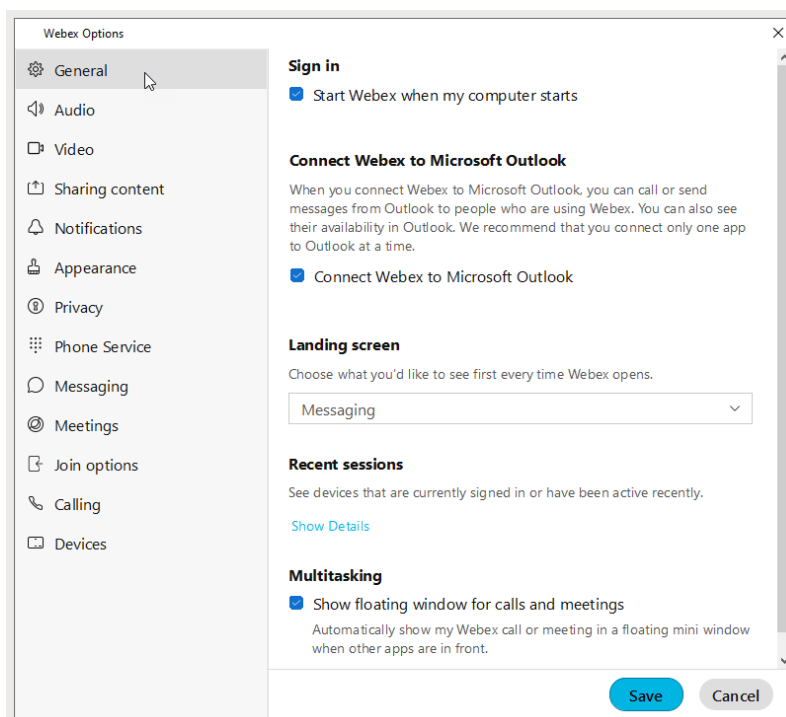
Audio

The Audio tab in *Settings* offers access to manage the following setting options:

Ringers and Alerts Device Selection and Volume

- Click on the drop-down selection tool to choose from device options.

- Output level offers a visual gauge of the loudness level when testing.

- Click and move the Volume slider to the right to increase/left to decrease.

- Click on the adjacent Test button to check ringer and alert setting selections.

Speaker Selection and Volume

- Click on the drop-down selection tool to choose from speaker options.

- Output level offers a visual gauge of the loudness level when testing.

- Click and move the Volume slider to the right to increase/left to decrease.

- Click on the adjacent Test button to check ringer and alert setting selections.

Microphone Device Selection and Volume

- Click on the drop-down selection tool to choose from microphone options.

- Input level offers a visual gauge of the loudness level when testing.

- Click and move the Volume slider to the right to increase/left to decrease.

- Click on the adjacent Test button to check ringer and alert setting selections.

Automatically Adjust Volume

Click to enable/disable.
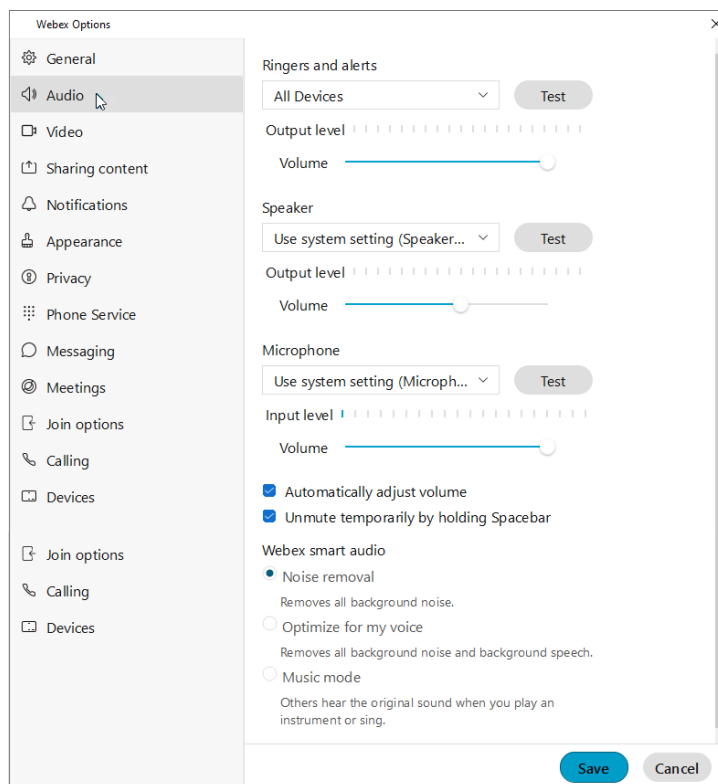
Unmute Temporarily by Holding the Spacebar

Click to enable/disable.

Webex Smart audio

- Noise removal (removes all background noise when enabled)

- Optimize for my voice (removes background noise/speech)

- Music mode (allows others to hear the original sound when music is played, or you sing.

Always click Save before leaving the Audio view if you have made changes.
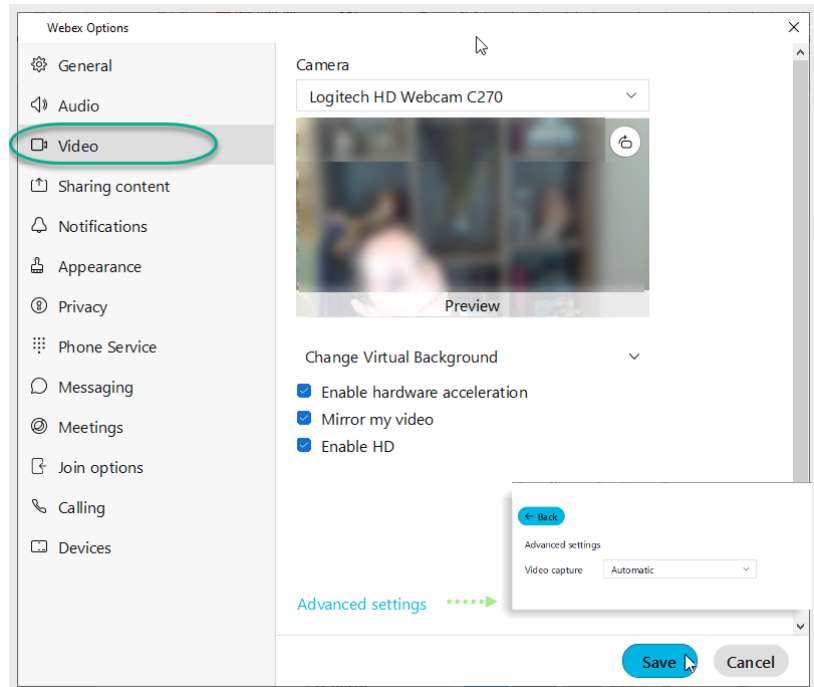
Video

The Video tab in *Settings* offers access to manage the following setting options:

Camera

- Click on the drop-down selection tool to choose from device options.

- The Preview window below offers a glimpse of what the selected camera sees and will show to others.

- The Rotate icon within the Preview window allows you to rotate 90°.

Change Virtual Background

- Click on an option to select a different background when you are on camera.

- The Preview window above offers a glimpse of what others will see when you select a virtual background.

- Click the **+** option and follow prompts to add a background image.

Enable hardware acceleration

Click to enable/disable.

Mirror my video

Click to enable/disable.

Enable HD Automatically Adjust Volume

Click to enable/disable.

Advanced Video Settings – Video Capture

Click the Advanced Video Settings link and use the drop-down selection tool to choose the capture method.

Always click Save before leaving the Video view if you have made changes.

Sharing Content

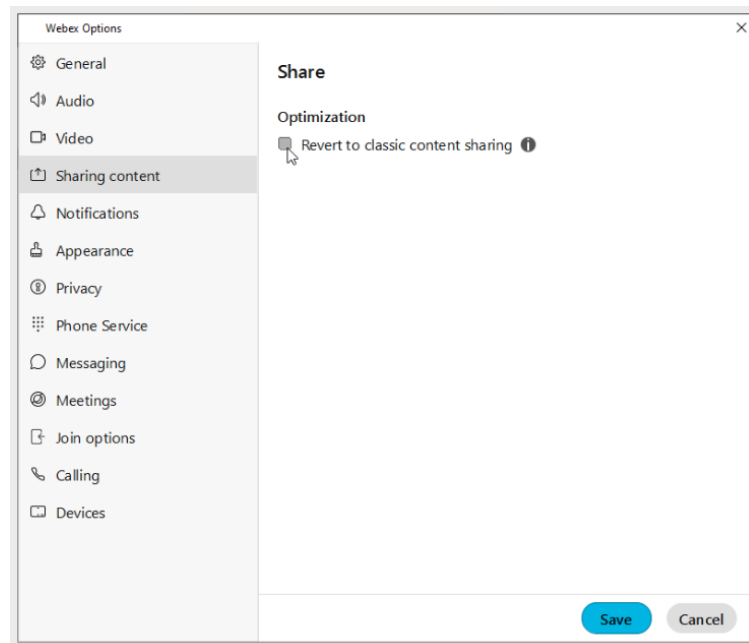The Sharing Content tab in *Settings* offers access to manage the following setting option:

Sharing Optimization - Revert to Classic Content Sharing

(Off by default) Click to place a check in the box to revert to classic content sharing.

Note: Click the Information icon to learn more about this setting.

Always click Save before leaving the Charing Content view if you have made changes.

Notifications

The Notifications tab in *Settings* offers access to manage the following setting options:

Taskbar Notifications

Click to keep notifications from displaying when Webex is closed.

Space Notifications

Set to Off, All Messages or @Mentions only.

Notification beeps for Messages are on by default but can be modified here and managed in the Space information menu. Use the drop-down selection tools provided to set to Off or select sounds for the following:

- Space Notification Sounds

- Direct Message Notification Sound

- Favorites Notification Sound

Meetings Notifications

Scheduled Meetings - Set notification preferences to occur prior to meeting start times or turn OFF.

Recording Notifications

Click to enable a notification when recordings are rendered and ready.

Direct Call Notifications

Choose the notification behavior when receiving a call

Always click Save before leaving the Notifications view if you have made changes.

Appearance

The Appearance tab in *Settings* offers access to manage the following setting options:

Themes

Click on an option to select the Dark (default) or Light theme.

Meetings

Click to place a check in the **Always use dark theme** check box to tell Webex to use the dark theme for the Meetings tool.

Reaction Skin Tone

Click on an emoticon with the color you prefer to choose the skin tone you wish to show for your reactions.

Always click Save before leaving the Appearance view if you have made changes.
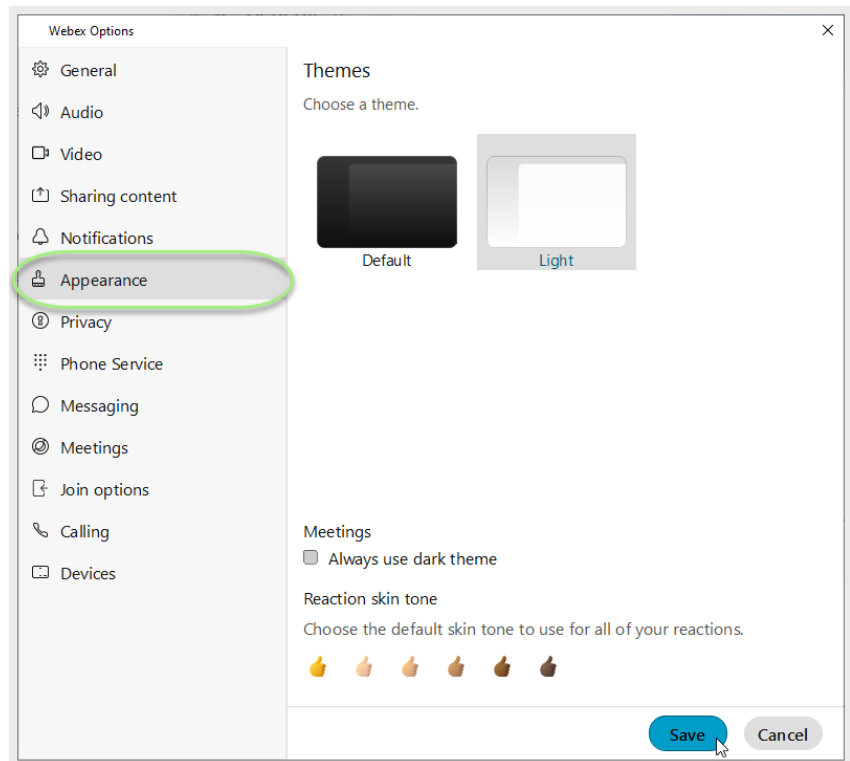
Privacy

The Privacy tab in *Settings* offers access to manage the following setting options:

Availability and Status

Click to place a check next to Show availability and status if you wish to display that information to others.

Hide My Availability and Status From Another Person

You may also elect to define specific individuals you want hide your availability and status from as needed. You can always come back to Privacy to change these settings.

Click on the Add button and type the name of the person you wish to have no visibility to your availability, then click Close to exit the dialog.

Return here to remove a person from the 'hidden from' list, as needed.

Always click Save before leaving the Privacy view if you have made changes.
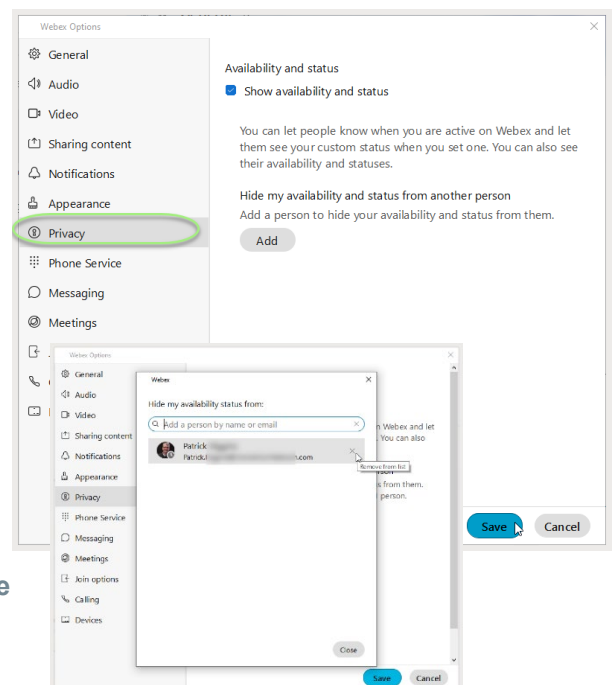
Phone Service

The **Phone Service** tab in *Settings* offers access to view the phone service connection status.
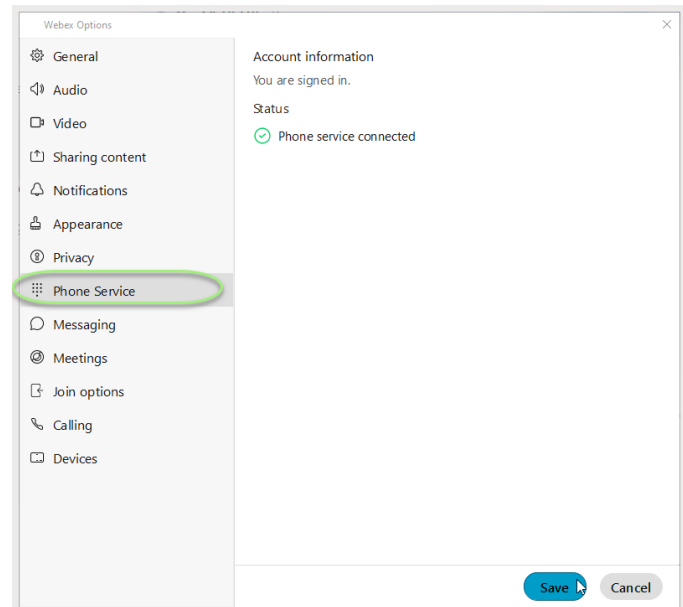
Messaging

The **Messaging** tab in *Settings* offers access to manage the following setting options:

Spell check

Click to place a check in the box next to **Enable spell checking**, as desired.

Language

Use the drop-down selection tool to choose an available language. English (United States) is the default.

Default File Download Location

The default location is in your local Downloads file on the C: drive.

Click on the Change link to open a local file browsing dialog to locate and select a new location for saving your file downloads.

Space List

Click to place a check in the box next to an option to enable it:

- Show Favorites on top (in Messages)

- Show compact view (list of names, rather than chats)

- Show separate tabs for Direct Messages and Spaces
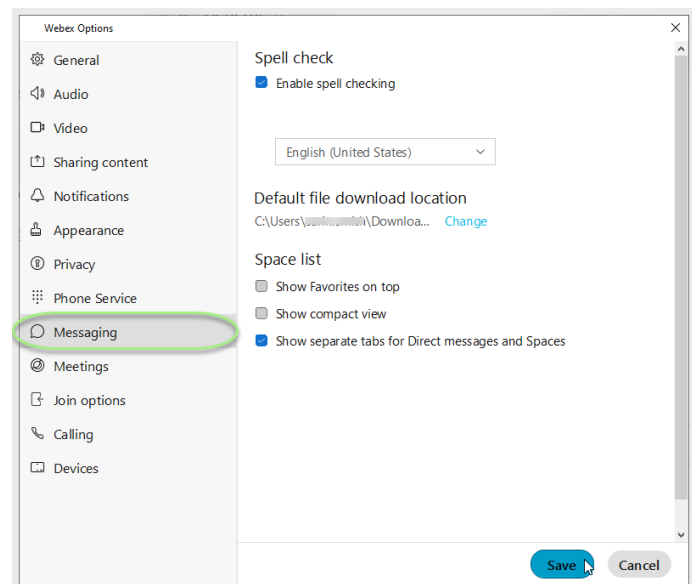
Always click Save before leaving the Messaging view if you have made changes.

Meetings

The Meetings tab in *Settings* offers access to manage the following setting options:

Connect a calendar

Use the connect tool to integrate a calendar (Google, Outlook) with Webex.

Schedule Meetings

The default it Webex Scheduler, but you may select the connected calendar instead.

Default Webex Site URL

Click on the Edit link if you wish to modify the URL for your Webex meetings.

Configure Advanced Settings

Click on this link to go to Webex Meetings online, click Sign In (top right), and manage your settings from there.

My Personal Room

(Where available) Check this section to review your room information and Host PIN, or

Click on the Edit my Personal Room on the Webex site link to open Webex online in a new browser window and make changes to those settings.

Always click Save before leaving the Meetings view if you have made changes.
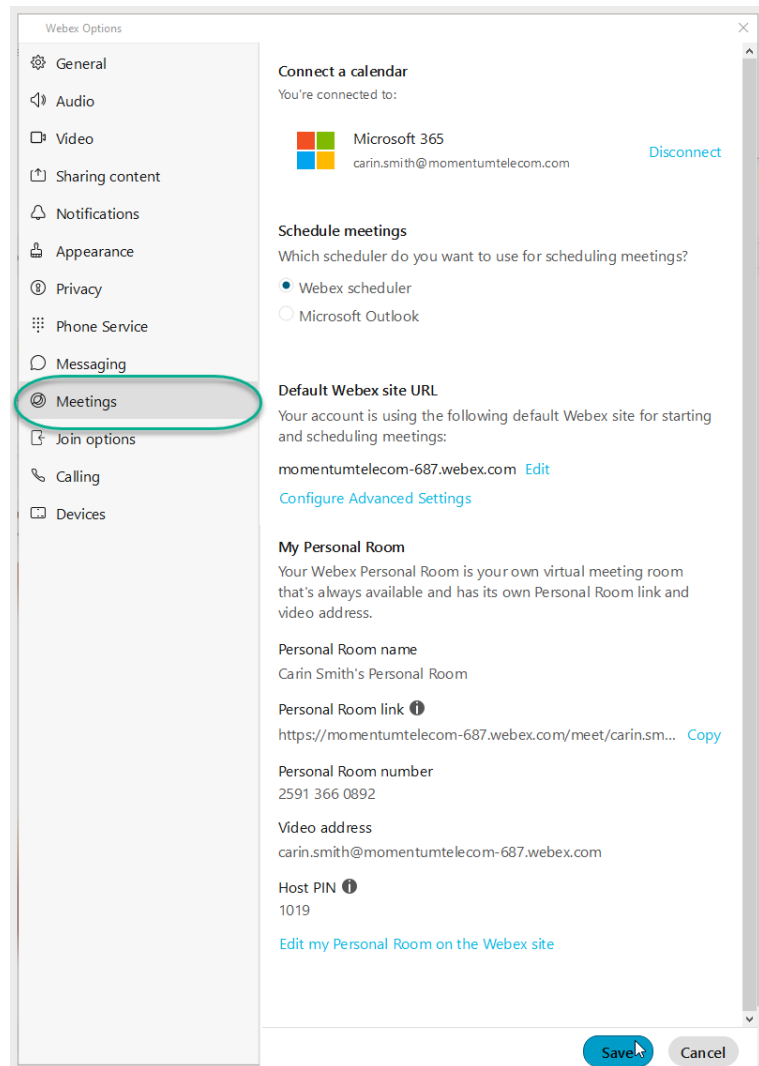
Join Options

The Join Options tab in *Settings* offers access to manage the following options:

Meeting Join Options

If Webex does not override site settings, you may click to select Use my last join options or Use my default join options

Call Me Phone Numbers

You can create a list of call me numbers and select from that list when you use the Call Me option to connect to audio. When numbers are defined, the list displays in this area for selection.

Click on the Manage my Call Me phone numbers link to define the numbers to be used.

Recent Phone numbers

This area displays any phone numbers used recently in meetings.
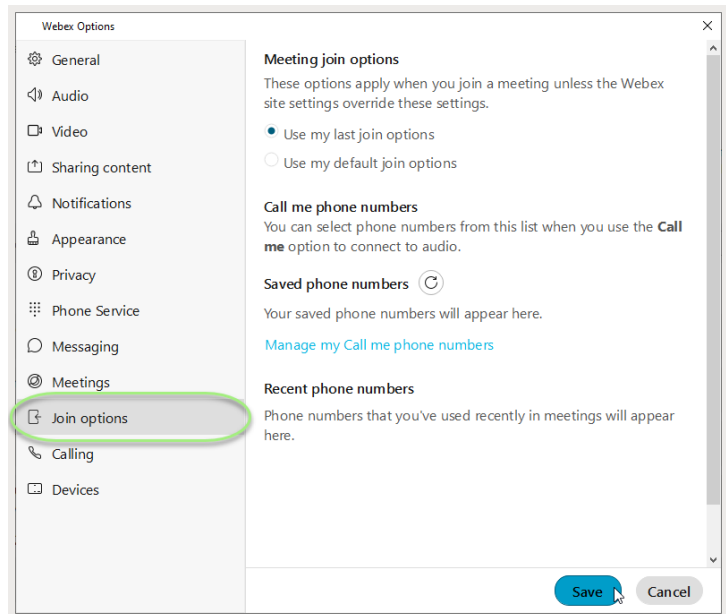
Always click Save before leaving the Join Options view if you have made changes.

Calling

See also: Manage Basic Calling Settings

The **Calling** tab in *Settings* offers access to manage the following setting options:

Incoming Calls

Answer calls with my video on (enabled by default). Remove the check if you don't want video turned on when you answer calls.

Call Forward (Basic Setting)

Configure basic call forward rules to either send to voicemail or do not forward. Use the Plus and Minus signs to add/remove phone numbers for call forward.

Call Window Settings

Use the adjacent drop-down selection tool to define the call notification window display behavior for
When using this computer for calls and for When using a desk phone or video device for calls

Advanced Call Settings

See also: Manage Advanced Calling Settings

- Incoming Calls - DND, Anonymous Call Rejection, Call Forwarding, Simultaneous or Sequential Ring, Remote Office, Call waiting

- Outgoing Calls - Block My Caller ID, Automatic Callback

- Voicemail - On/OFF, Send calls to voicemail, When a message arrives, Email notifications, Press O to transfer

- Call Control - Call Center Queue status (Sign IN/OUT, Wrapping Up, Unavailable, Available), Call Center Queue IDs, BroadWorks Anywhere

Always click Save before leaving the Join Options view if you have made changes.
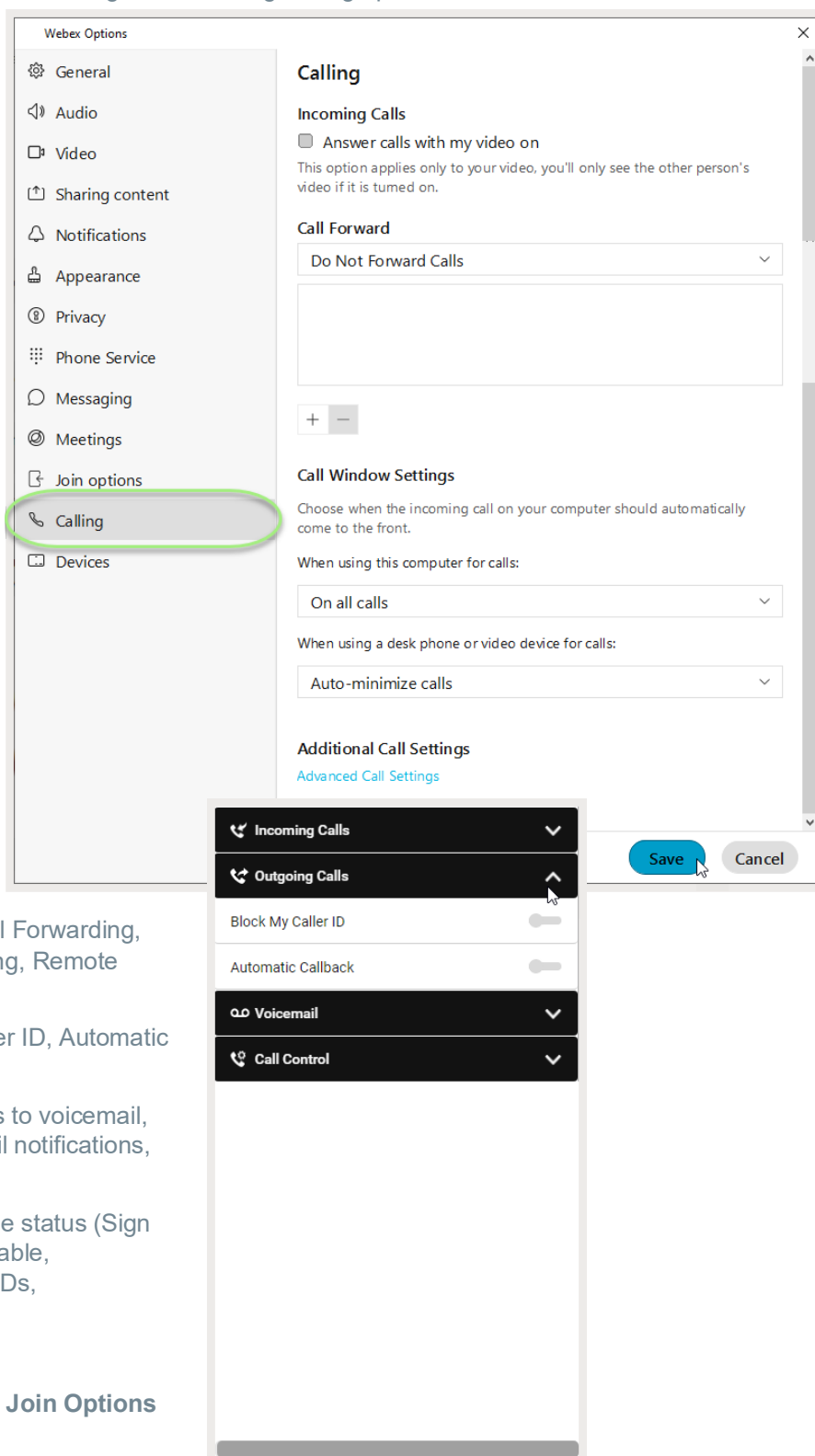
Devices

The Devices tab in *Settings* offers access to manage the following setting options:

Use Ultrasound

Webex devices use ultrasound signals. Click to enable this if you wish to use to have your microphone listen for compatible Webex devices.

Connect to Nearest Device Automatically

Click to enable if you wish to automatically connect to found devices in the room.

Use Wi-Fi

Click to enable if you wish to use discovered Wi-Fi networks in your vicinity.

My Devices

When Cisco devices are activated nearby, they are listed in this section.
Click the refresh icon to check for updates to the list.

Personal Devices

Devices on your account show here.

Click to enable use of or connections to a device listed here.

Always click Save before leaving the Devices view if you have made changes.

KEYBOARD NAVIGATION AND SHORTCUTS

You can use keyboard navigation and shortcuts to make working in Webex App more accessible, based on your needs, and also to save time and reduce the number of mouse clicks.
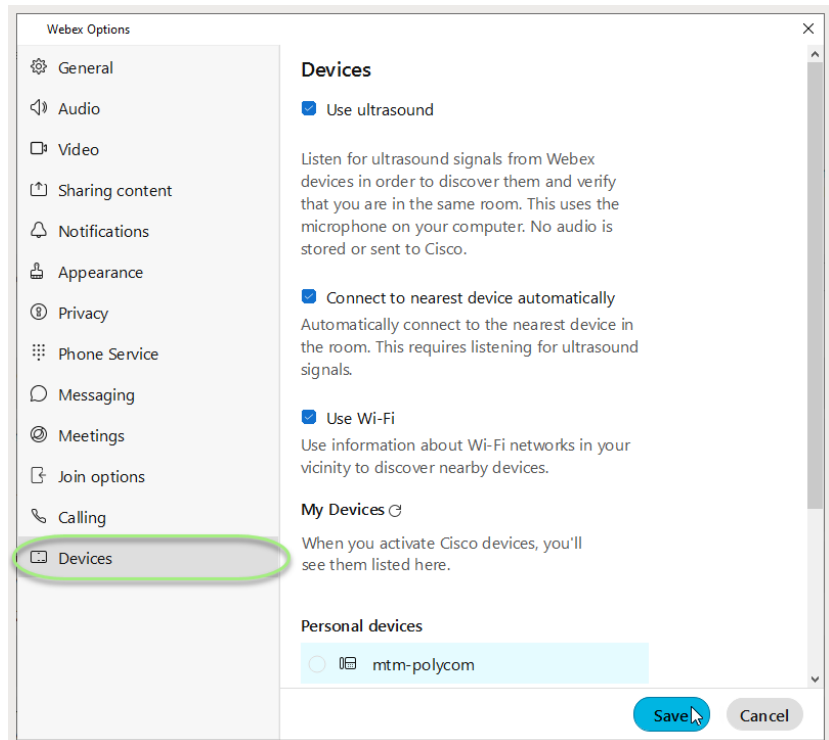
Find the Keyboard Shortcuts Menu

Press **Ctrl + /** to access the Shortcuts menu in the app. The most frequently used shortcuts for most Webex Applications are listed, and you'll also be able to search through the list.

Keyboard Navigation

You can use your keyboard to navigate through Webex App.

Some keyboard shortcuts work in a specific context. For example, **Ctrl + B** toggles bold text when you're writing a message.

- Use Ctrl and a number, to move through the items in the navigation menu displayed to you. For example: Ctrl + 1 brings you to the first item and Ctrl + 2 brings you to the second item.
- Use the Tab key to navigate within your app, use Shift + Tab to navigate through items.
- Use Alt with the ← Left or Right → arrow keys, to navigate forwards and backwards through spaces and tabs, and mark items as read.
- Use the Spacebar or Enter keys to select items.

General Shortcuts

Action	Keyboard shortcut
Advanced Search	Shift + Return
Copy Space information to Clipboard	Ctrl + Shift + K
Go Back/Forward in History	Alt + Left/Right arrow keys
Go to Calling	Ctrl + 4
Go to Contacts	Ctrl + 3
Go to Meetings	Ctrl + 5
Go to Messaging	Ctrl + 1
Go to Teams	Ctrl + 2
Open Help Center	F1
Open Keyboard Shortcut Search	Ctrl + /
Search	Ctrl + F
Quit Webex	Ctrl + Q

Messaging Shortcuts

Action	Keyboard shortcut
Add a Gif	Ctrl + G
Attach a File	Ctrl + O
Create a space	Ctrl + Shift + N
Add People	Ctrl + Shift + P
Go to All (Spaces and Direct) List	Alt + Shift + A
Go to Direct message List	Alt + Shift + B
Go to Spaces List	Alt + Shift + C
Go to Drafts	Alt + Shift + K
Go to @ Mentions to Me	Alt + Shift + F
Go to @ Mentions to All	Alt + Shift + G
Go to Flags	Alt + Shift + J
Go to Threads	Alt + Shift + I
Go to last message in Focus	Ctrl + H
Go to compose Message Area	Ctrl + Shift + I
Go to Notifications	Alt + Shift + D
Go to Unread	Alt + Shift + E
Leave the Space	Ctrl + Shift + E
Move up/down the spaces list	Alt + Down/Up
New Whiteboard	Alt + Shift + U
Search in a Space	Ctrl + Shift + J
Send a Direct Message	Ctrl + N
Show Right-Click Menu	Shift + F10
Add to Favorites	Ctrl + Shift + F
Edit Last Message	Shift + Up Arrow

Formatting Shortcuts

Action	Keyboard shortcut
Add New Line in Message	Shift + Enter
Markdown	Alt + Shift + M
Bold	Ctrl + B
Italic	Ctrl + I
Underline	Ctrl + U
Bulleted List	Alt + Shift + U
Numbered List	Alt + Shift + O
Heading Size 1	Alt + Shift + 1
Heading Size 2	Alt + Shift + 2
Heading Size 3	Alt + Shift + 3
Undo	Ctrl + Z
Redo	Ctrl + Y
Copy	Ctrl + C
Cut	Ctrl + X
Paste	Ctrl + V
Add Emoji	Windows Key + .
Insert Personal Meeting Room link	Alt + Shift + P
Page Down	PgDn
Page Up	PgUp

Calling and Meeting Shortcuts

You can use these global shortcuts to control Webex App even when you are using another application.

Action	Keyboard shortcut	Global
Answer a Call	Ctrl + Shift + C	✓
Answer with a Message	Ctrl + R	✓
End a Call	Ctrl + L	
Transfer a Call	Alt + Shift + T	
Decline a Call	Ctrl + D	✓
Add Guest	Ctrl + Shift + G	✓
Share Content	Ctrl + Shift + D	✓

Action	Keyboard shortcut	Global
Switch to Full Screen	Alt + Shift + Y	
Close Dialog Box	Alt + F4	
Zoom in/out when Sharing	Not supported	
Fit Shared Content to Width	Ctrl + Shift + W	
Sync Shared Content Display	Ctrl + Shift + Y	
Thumbnail View	Ctrl + T	
Stop Sharing	Ctrl + Shift + Z	✓
Show/Hide Menu bar	Ctrl + Shift + H	
Lock/Unlock a Meeting	Alt + Shift + L	
Dock/Undock Call Window	Ctrl + Alt + P	
Start Annotation	Alt + Shift + Z	✓
Pause or Resume Sharing	Alt + Shift + S	✓
Share Whiteboard	Ctrl + Shift + B	
Share an Application	Not supported	
Allow all Participants to Share	Not supported	
Mute all Participants	Ctrl + Shift + U	
Stop Annotation	Alt + Shift + X	
Open Dialpad	Ctrl + Shift + K	
Audio Mute/Unmute	Ctrl + M	
Video On/Off	Ctrl + Shift + V	
Show Meeting Controls	Ctrl + Shift + Q	
Browse to Open and Share a File	Ctrl + O	
Print Document being Shared	Ctrl + P	
Previous Slide when Sharing	PgUp	
Next Slide when Sharing	PgDn	
Raise/Lower your Hand	Ctrl + Shift + R	
Lower all Participants Hands	Ctrl + Shift + L	
Switch between Content and Tab View	F6	
Rotate Page Left when File Sharing	Ctrl + Shift + <	
Rotate Page Right when File Sharing	Ctrl + Shift + >	
Mute Meeting Participants	Ctrl + Shift + U	

Action	Keyboard shortcut	Global
Assign Privileges to Meeting Participants	Ctrl + R	
Make an Audio Call	Ctrl + Alt + C	
Make a Video Call	Ctrl + Alt + V	
Turn Music Mode On/Off	Ctrl + Shift + M	
Turn Screen Reader On/Off	Ctrl + Shift + C	
Transfer a File	Ctrl + Shift + T	
Copy Text from Chat Panel	Ctrl + A	
End Remote Desktop Control	Alt + Shift + V	✓
Start Remote Desktop Control	Alt + Shift + R	✓