

Hosted Voice with Webex Getting Started Guide



We've Got You

Learning how to navigate a new app can be tricky. We'll show you everything you need to know about using the new Hosted Voice with Webex application.

This essential guide will show you how easily our solution can fit into your workday by streamlining messaging, meetings, whiteboards, and file sharing all in one app.

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1 Who Can Use Hosted Voice with Webex

HOSTED VOICE WITH WEBEX WORK FOR ALL TYPES OF TEAMS

No matter what the duties of your organization, our solution fits their daily tasks.

THE GROWING TEAM

- In a growing team, people are coming and going. New hires need a smooth joining experience.
- Securely exchange personal information with the company and easily access information to be productive, quickly.
- Meet with their team and have one-on-one mentoring sessions.
- Enrich the hiring process, from interviews to contract signing and orientation information.

THE MOBILE TEAM

- You and your team need the flexibility to get things done while working on-the-go. Being able to access information from multiple locations and devices is key to moving work forward even when you aren't in the office.
- Your team can use Hosted Voice with Webex through the desktop, mobile, or web apps to get information quickly, seamlessly and securely.
- No matter where you are, your team can collaborate.

THE DISTRIBUTED TEAM

- Your team is spread around various locations, including work and home, which allows you to attract and retain talent anywhere.
- Use spaces and teams to access and share the most valuable knowledge from and with people throughout the company.
- Answer questions quickly from your mobile device, at any time of day.
- Make virtual leaders more engaged and involved, with their teams.

THE CREATIVE TEAM

- You need to keep creativity at a high level and deliver promptly, regardless if the stakeholders are internal, external, local or international.
- Use pictures and drawings, not just words, to share ideas and provide feedback.
- Easily have impromptu or scheduled video calls with any internal or external stakeholder to review documents live and see facial reactions.

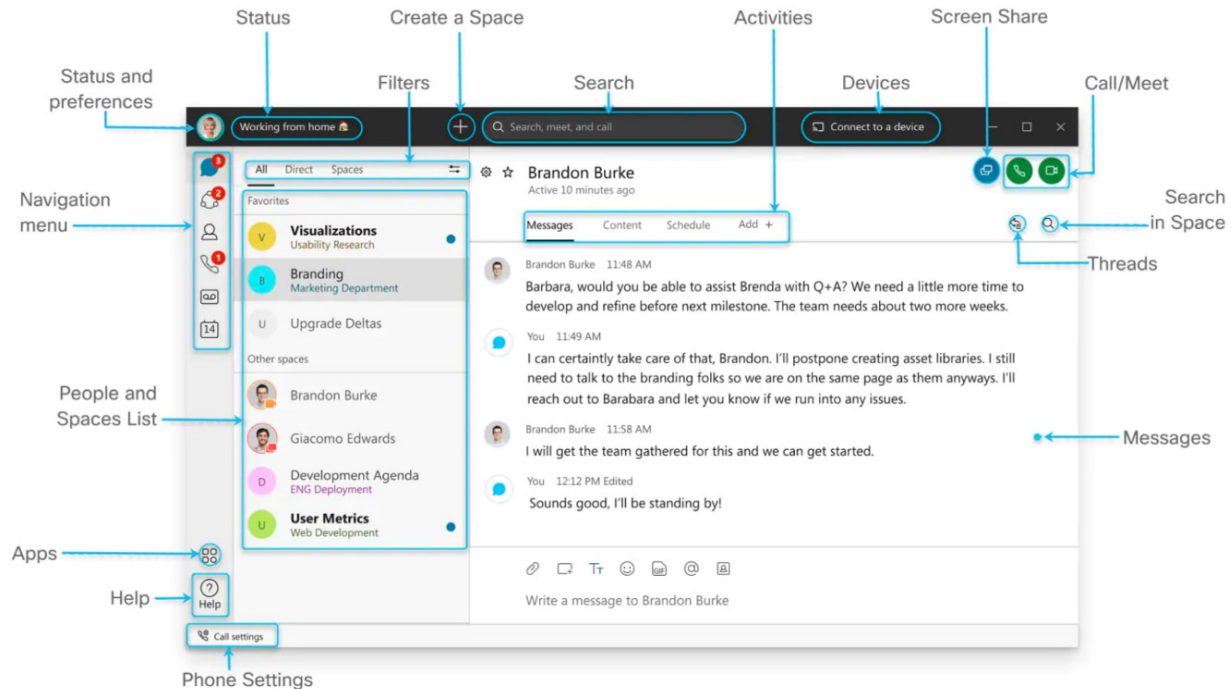
THE PROJECT TEAM

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

2 Getting Started

It's important to understand as many basic functions as possible, as well as the locations of the buttons that are most relevant. This section will help bring these to light.

2.1 Getting to Know Hosted Voice with Webex



2.2 Add a Profile Picture

A clear picture of you makes it easier for others to reach out to you.

Step 1

Click on your initials on the top left corner.

Step 2

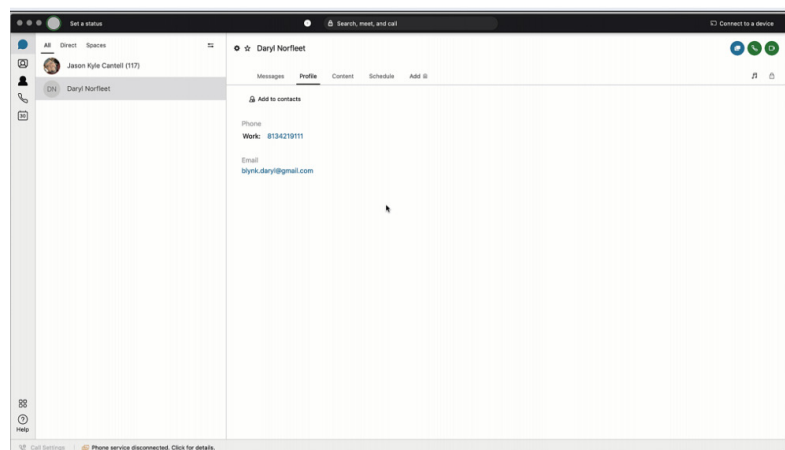
Click on your initials in the window that opens.

Step 3

Select a picture.

Step 4

Change the email address to your name, just under the profile picture.



Tip - By clicking on the profile picture and clicking **Settings** you can customize even further.

2.3 Additional Settings

To manage notifications, your camera and audio settings, click on your profile picture and select **Settings**.

NOTIFICATIONS

Set your notifications to stay up-to-date.

Step 1

Click on Notifications.

Step 2

Select the notifications for your spaces, scheduled meetings, and calls.

Step 3

Select your notification sounds.

Step 4

Click Save.

CAMERA

Select which camera you want to use in calls and meetings, if you have more than one connected to your computer (built-in, external).

Step 1

Click Video.

Step 2

Select your webcam from the drop-down list.

Step 3

Click Save.

AUDIO

Make sure it's working properly and that you hear the audio notifications at all times.

Step 1

Click Audio.

Step 2

Select which device will be used for the microphone, speaker and ringer.

Step 3

Click Save.

3 Teams and Spaces

WHAT ARE TEAMS AND SPACES

Create teams and spaces to manage all your communication and collaboration needs.

TEAM

- A Team is a group of people who are connecting for a longer-term community, a larger project or business objective.
- Each team has a space called General that everyone belongs to.
- You can add any number of additional spaces to the team to divide up projects or priorities within the team.

SPACE

- A Space is a group of people who have been invited to work together.
- Spaces typically have names that describe what they're for or are named after the people in them if they're one- on-one.
- A Space can either be standalone or associated with a team. They can grow or shrink as needed.

3.1 Create a Team

In Hosted Voice with Webex, teams help you keep everything organized by categorizing multiple spaces under a common theme.

Step 1

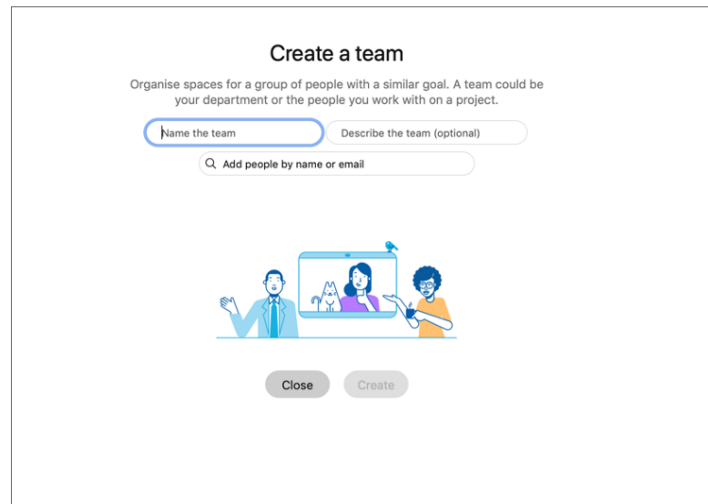
Go to Teams.

Step 2

Choose the Plus icon, name the team, and click Create.

Step 3

Use the search bar to add team members. Enter a name or email address and pick from the results list. People get added to the General space automatically, but then can join any team spaces on their own.



Step 4

Click Create. To create more spaces for the team, click Create a space and add the space name.

3.2 Create a Space

In Hosted Voice with Webex, you can interact 1:1 or you can collaborate with a group of people using spaces.

Step 1

Click the + sign next to the Search field.

Step 2

Click Create a space.

Step 3

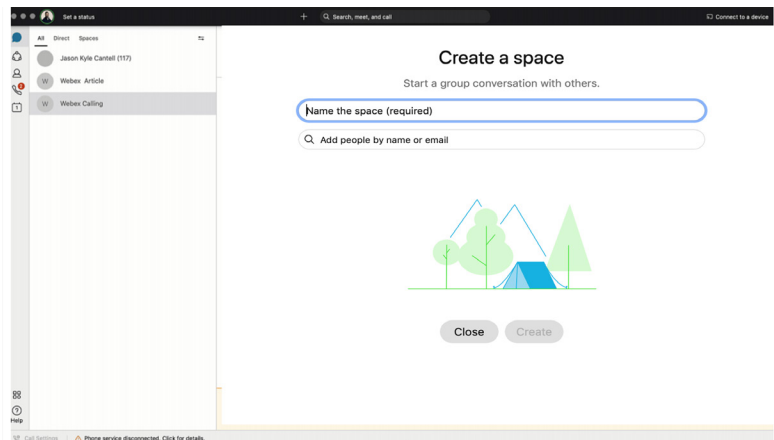
Type a name for your space.

Step 4

Enter the names of people you want to invite.

Step 5

Click Create.



Tip - Create a 1:1 space with a co-worker or client to have conversations, meetings, and share files anytime. Create 1: many spaces to share files, chat and meet with your teams to keep project velocity at top speed.

4 Messaging and Searching

MAKING THINGS HAPPEN WITH MESSAGING AND SEARCH

In this section, learn how to collaborate with power messaging, sort messages, and search for specific messages, files and people.

4.1 Powerful Messaging

@MENTION

To grab someone's attention @mention their name. They will see @ against the space, showing that their name has been tagged.

EDIT MESSAGES

Made a typo? Not a problem, simply hover over your message and click Edit message. Then, make your changes and click update. After you update the message, you'll see (Edited) next to it in the space.



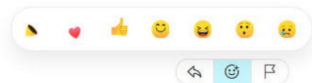
SEND SOMEONE A MESSAGE

You can easily contact internal or external people using the chat panel for 1:1 interactions or group communications in spaces.

Type the name of the person or space in the Search field. Click the person or space name. Type your message and press the enter key.

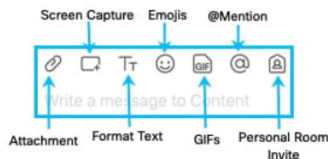
REACT TO MESSAGES

Want to add a quick reaction to a message? Hover over the message you'd like to react to and click the Add reaction icon.



GIVE YOUR MESSAGE SOME PERSONALITY

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



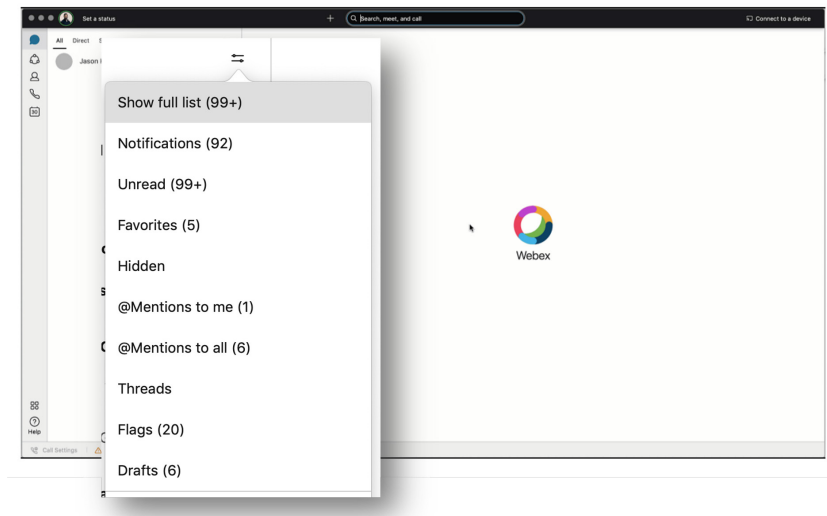
ANSWER A SPECIFIC MESSAGE IN A THREAD

Slide your mouse above the message and use the arrow option.



4.2 Sort Messages

To help zoom in on priority items and avoid information overload, simply click the Filter icon and select:



NOTIFICATIONS:

Shows a list of all spaces where you have notifications selected and something new happened.

UNREAD:

Shows all unread messages.

FAVORITES:

Shows a list of all spaces you marked as favorites.

HIDDEN

Shows all of your hidden spaces. Hidden spaces no longer show in your spaces list.

@MENTIONS TO ME

Shows a list of all messages you have personally been @mentioned in.

@MENTIONS TO ALL

Shows a list of all messages where everyone was @mentioned in spaces you are a member of.

THREADS

Shows a list of threads within chats and spaces.

FLAGS

Shows a list of all messages you've flagged.

DRAFTS

Shows a list of your drafted messages.

4.3 Searching Messages, Files and People

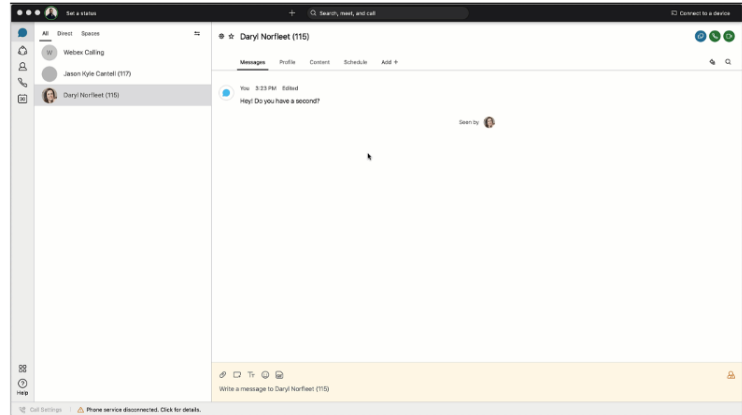
Thanks to the advanced search feature, you can easily rediscover people, spaces, messages, and files.

Search for people or spaces

Start typing the person or space name into the Search field.

Search for content in a chat or space

If you are looking for a chat message or file, click the Search icon within the chat or space. Then enter the keywords or document name in the search field.



Tip:

If needed, refine your search by first typing one of the following:

- In: Enter the name of the space and choose a space from the list.
- From: Enter the person's name and select the person from the list.
- With: Enter the person's name and select the person from the list. The results include spaces you are in with this person.

5 Getting Work Done with Calling and Scheduling

5.1 Starting and Answering Calls

You can start video and audio calls with individuals from 1:1 spaces.

START A CALL

There are different ways to call in Hosted Voice with Webex. One easy way is to:

Step 1

Click the Search field.

Step 2

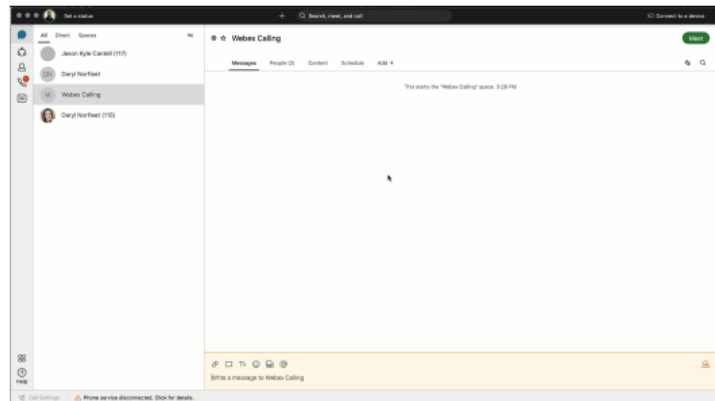
Start typing the name of the person or space you want to call.

Step 3

Click the name of the person or space in the results list.

Step 4

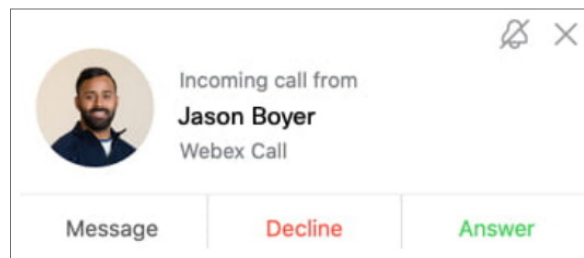
Click the Audio Call or Video Call icon at the top right of the space.



ANSWER A CALL

When you receive a call, you'll see a notification allowing you to:

- Answer: To take the call.
- Decline: If you can't answer now.
- Message: If you want to answer with a chat message instead.



5.2 Starting Meetings in a Space

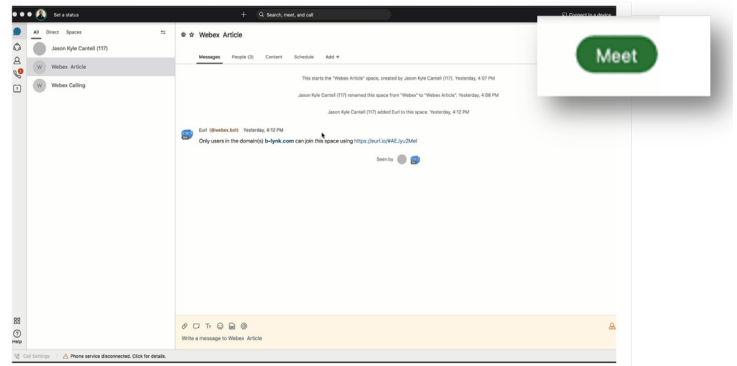
You can start a meeting directly from a space. Need to escalate from messaging to a meeting? You can also initiate an ad-hoc meeting just by clicking Meet in your space.

All team members that have “Smart Notifications” set up will get a ping that their team is meeting!

And the green meet button will appear next to the space.

They only need to click to join in!

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



5.3 Invite Someone from Within a Call

When a call is running in a space, you may wish to invite someone as a guest but not add them to the space. To do this when on the call:

Step 1

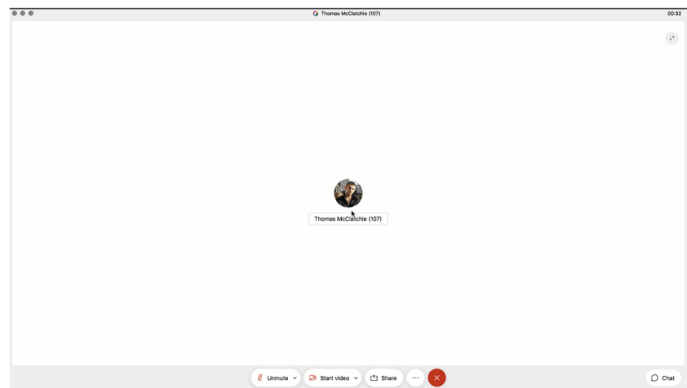
Click the “...” icon in the meeting window.

Step 2

Click Invite guests to meeting.

Step 3

Type the name of the person you want to invite or their email address.



5.4 Whiteboarding

Whiteboards are powerful and simple tools to convey visual ideas and brainstorm on projects. Within Hosted Voice with Webex you can share whiteboards both during and outside a meeting.

WITHIN A MEETING

Step 1

Click the “...” icon in the meeting window.

Step 2

Click New whiteboard.

Step 3

Use the annotation tool to draw on the whiteboard. You can also continue an existing whiteboard previously shared in the space.



OUTSIDE A MEETING

Step 1

Click the space where you want to share the whiteboard.

Step 2

Click the Content tab.

Step 3

Click Whiteboards.

Step 4

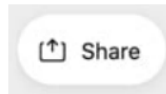
Click New Whiteboard. Alternatively, you could reopen a whiteboard already shared in that space.

Step 5

Use the annotation tools to draw on the whiteboard.

Step 6

Click the Share icon.



Step 7

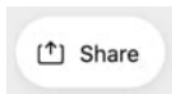
Click Post snapshot for your whiteboard to appear in the chat thread.

5.5 Screen Sharing

In Hosted Voice with Webex you can share your screen with others, including streaming videos. Share your screen during a meeting or even in 1:1 spaces outside, of a call.

Step 1

Click the Share Screen icon.



Step 2

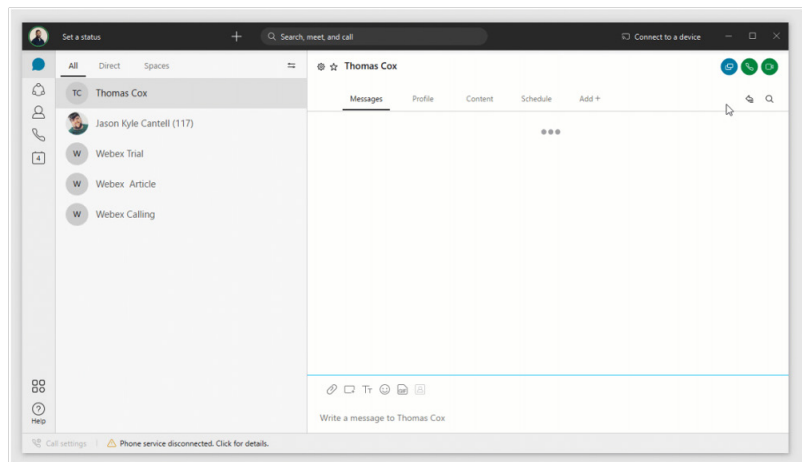
If you are planning to share a video, check Share computer audio and Optimize for video on top of the screen.

Step 3

Select the screen you want to show.

Step 4

To stop, click Stop in the orange bar at the top.



6 Tips and Tricks

6.1 Spaces Tips and Tricks

ADD AN EXTERNAL PARTICIPANT TO A SPACE

You are not limited to communicating with only your organization. Invite external contacts like vendors or customers to collaborate with you in spaces using their email. You can keep track of what spaces have external contacts by the icon in the lower right corner.



ADD A SPACE TO YOUR FAVORITES LIST

You can be more engaged in some spaces than in others. To keep a closer eye on those spaces that truly matter, you can add them to your favorites list by clicking the star in front of the space name.



ADD INTEGRATIONS TO YOUR SPACE

You can see directly in the Hosted Voice with Webex space if someone added something new in your CRM, or updated specific documents in Dropbox. To get all the information you need in one place, jump to the Hosted Voice with Webex App Hub to check the available integrations. Can't find what you need? Jump to developer.webex.com to build your own.

FORWARD MESSAGES

Sometimes you see a message in one space and want to share it with people in another. You might be chatting directly with someone, but something comes up in that conversation that you'd like to discuss with others.



CHECK PEOPLES STATUS

Knowing if people are available is important when you need to communicate with them. With Hosted Voice with Webex, just use the Search field to find someone and hover over their picture to get more information.

Picture appearance	Status
	Green border—Active in the last 10 minutes.
	No border—Active in the last 24 hours.
	Translucent profile picture—Not active for more than 24 hours
	Airplane—The out of office reply is set in Microsoft Outlook
	Moon—Do not disturb.
	Video—In a meeting or on a call. Can't be seen when using the mobile app.
	Sharing—Sharing a screen or application. Can't be seen when using the mobile app.

TURN ON ANNOUNCEMENT MODE

What if you need to dispatch information to an audience without a long thread of reactions? Switch on Announcement mode so only the moderators can post in the space.

Step 1

Click the Space Information icon in front of the space name.

Step 2

Click Moderate Space.

Step 3

Click Moderate.

Step 4

Click the Space Information icon in front of the space name.

Step 5

Click Turn On Announcement Mode.

Step 6

Click OK.

6.2 Bots

Hosted Voice with Webex makes it possible to bring content into teams and spaces from another application. Access business information and alerts from other systems. Avoid switching in and out of different apps to get information. It's also possible to create bots to automate repetitive, high-volume business processes, that no one enjoys doing.

BOTS

A bot is a simple way for users to use natural language to request automated tasks to be completed on another platform.

In Hosted Voice with Webex, a bot is a member of a space just like any other real person. The possibilities of bots are endless. They can be as simple as getting weather updates where you live, or as complex as booking a meeting room or a flight.