



Webex For WHC

User Guide

Desktop, Smartphone & Tablet

November 2023

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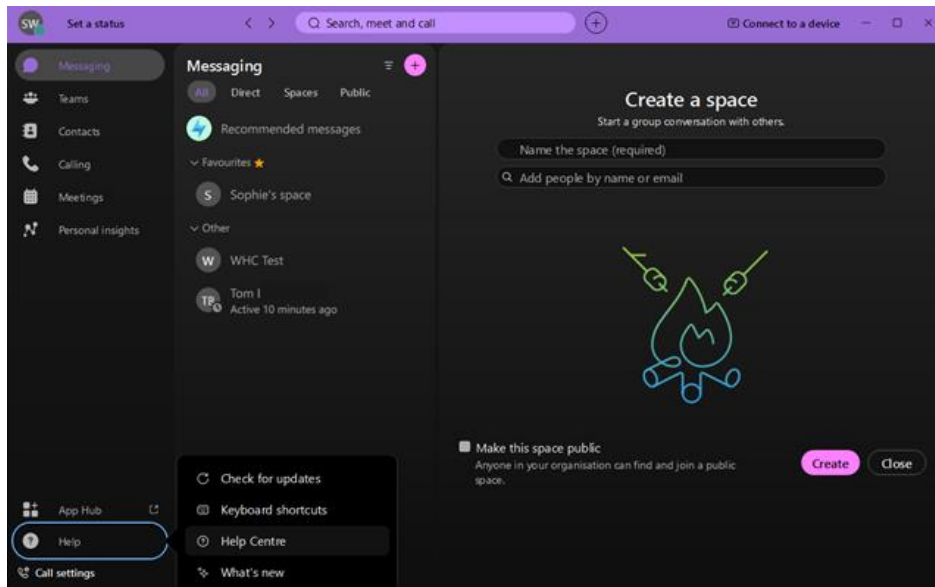
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1 In-App Support

The first place for guidance and support is the in-app support. Here the user will find up to date support for all elements of Webex.

It can be accessed from the **Help Centre** within the app.

- Go to **Help**
- Click on **Help Centre**



- This will then open the Webex Help Centre as a web page. It is also available [here](#).

Please note that not all articles within the Help Centre will have information relating specifically to the WHC Webex app.

2 Overview

Webex provides best in class Unified Communication capabilities fully integrated with the WHC service. The application can be run across different devices, to meet your needs, inside and outside the office.

The desktop version of the app will work across computers running Windows and Mac iOS. The mobile versions can be run on Apple and Android mobiles and tablets. The features available within the app will depend on the Webex licence selected and are available for the following WHC licences.

- Foundation
- Functional
- Fixed
- Mobile

The Softphone package can be added to any of the existing WHC licences free of charge. The Basic Webex package is included free of charge with the Mobile WHC licence.

Below is a summary of the app features available for the different licences:

2.1 Feature Matrix

	Softphone	Basic	Standard	Premium
Calling Features				
Audio Calling (PSTN/VoIP)	✓	✓	✓	✓
Video Calling	✓	✓	✓	✓
Dialpad	✓	✓	✓	✓
Mute/Unmute	✓	✓	✓	✓
Hold/Resume	✓	✓	✓	✓
Call Transfer (Attended, Semi Attended, Blind)	✓	✓	✓	✓
Sharing – (Screen, application)	✓	✓	✓	✓
Remote Desktop Control	✓	✓	✓	✓
Call Pull	✓	✓	✓	✓
3-Way Audio Call Conferencing/Merge	✓	✓	✓	✓
Group Call Park/ Retrieve	✓	✓	✓	✓
Call Pickup (Desktop only)	✓	✓	✓	✓
Team Telephony/BLF Monitoring plus Call Pickup	✓	✓	✓	✓

Call Push Notifications (Mobile)	✓	✓	✓	✓
Basic Call Settings (e.g. DND, Call Forward, Call Waiting; etc.)	✓	✓	✓	✓
Personal Contacts (Local Mobile & Enterprise Directory)	✓	✓	✓	✓
Call History	✓	✓	✓	✓
Common Identity Search	✓	✓	✓	✓
Microsoft Teams Integration for Calling	✓	✓	✓	✓
Integration with WHC Features & Addons includes Voicemail, Call Recording; Hunt Groups; etc.	✓	✓	✓	✓
Messaging Features				
Presence		✓	✓	✓
Personal Status Message		✓	✓	✓
Basic Messaging Features (e.g. read receipt; view history; mentions)		✓	✓	✓
Search within a Space		✓	✓	✓
Pin Messages in a Space		✓	✓	✓
Custom Space Notification (Off/On/@mentions only)		✓	✓	✓
Headsets		✓	✓	✓
Messaging - direct chat & Spaces (group) chat		✓	✓	✓
Sharing – file; screen capture; whiteboards		✓	✓	✓
Storage		2GB	5GB	10GB
Default storage duration		360 days	360 days	360 days
Emojis; Gifs; Reactions; Rich Text		✓	✓	✓
Embedded Apps		✓	✓	✓
Messaging – moderator controls				✓

Meetings

Meeting duration (max)	40 Minutes	24 Hours	Unlimited
Meeting participant capacity	(100) ✓	(100) ✓	(1000) ✓
Personal Meeting Room (PMR)	✓	✓	✓
HD Video	✓	✓	✓
Screen sharing – desktop (screens/applications/files) & mobile	✓	✓	✓
Whiteboard	✓	✓	✓
Full screen & gallery view	✓	✓	✓
Virtual background	✓	✓	✓
Mute and dismiss participant/all	✓	✓	✓
Background noise reduction	✓	✓	✓
Multi-party chat	✓	✓	✓
Interactions (e.g. animated meeting reactions; gestures; raise hand; polling)	✓	✓	✓
Breakout sessions	✓	✓	✓
Notes	✓	✓	✓
Web guest experience	✓	✓	✓
Schedule meetings (including PMR)	✓	✓	✓
Notes	✓	✓	✓
Q&A	✓	✓	✓
Lock meeting	✓	✓	✓
In-app meeting scheduler	✓	✓	✓
Immersive share		✓	✓
Dial in number for meetings		✓	✓
Persistent meeting link		✓	✓
Closed Captions		✓	✓
Real Time Transcription (English, French, German, Spanish, Italian)		✓	✓
Personal insights		✓	✓

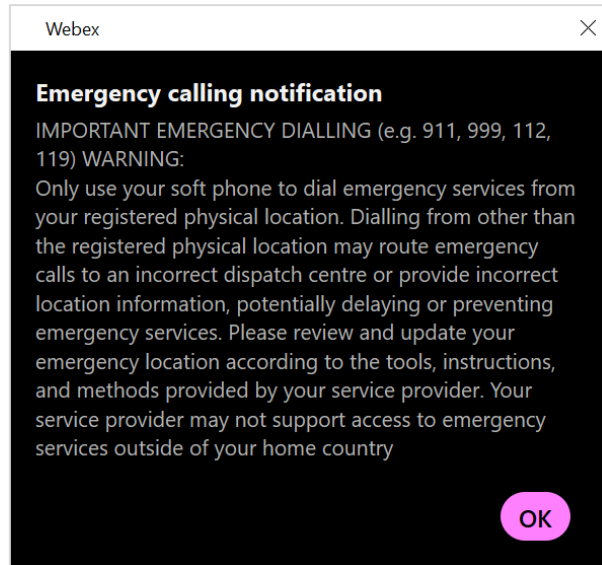
Password protection	✓	✓
Record meetings		✓
Recording transcriptions		✓
Presenter controls		✓
Remote desktop control		✓
Allow PMR URL change		✓
Enable other users to schedule meetings on their behalf		✓
Delegate meetings (alternate host; In-meeting host control)		✓
Media Quality Indicator		✓

3 Welcome Screen

Depending on the licence tier of Webex the user has been assigned, they will be presented with a Welcome Screen showing a set of options for an initial introduction to the app features.

3.1 Emergency Calling Notification

Users will also be prompted to read through the below message regarding emergency services, after which they can select the "OK" button to continue through to the Webex home screen. Partners must ensure this message is carefully read through by their resellers and any end users.



4 Main Webex Interface

After users close the above emergency services pop up by clicking “OK”, they will be shown the desktop main home screen below. This will vary depending on the licence tier the user has been assigned (i.e. Softphone users will have a limited version of the below in line with the features available with this packages – please refer to the feature matrix for full detail).

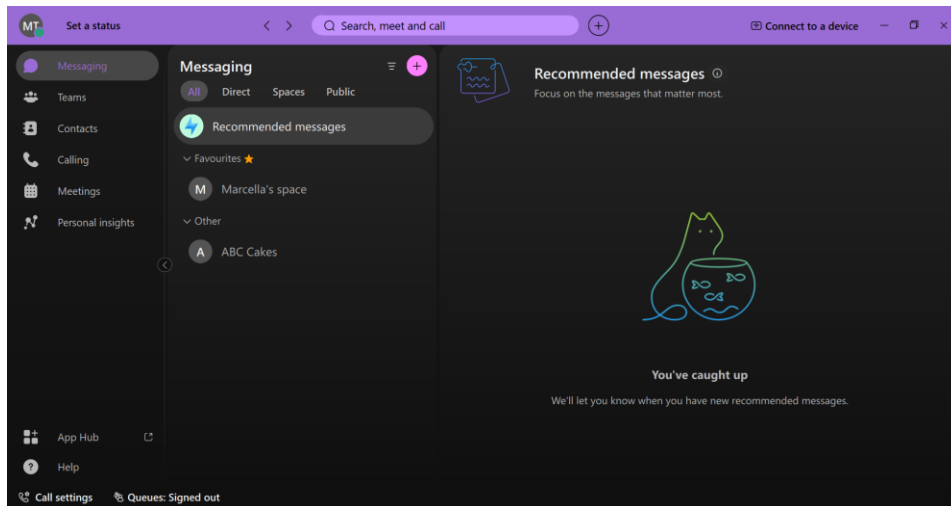


Figure 1 - Desktop Interface

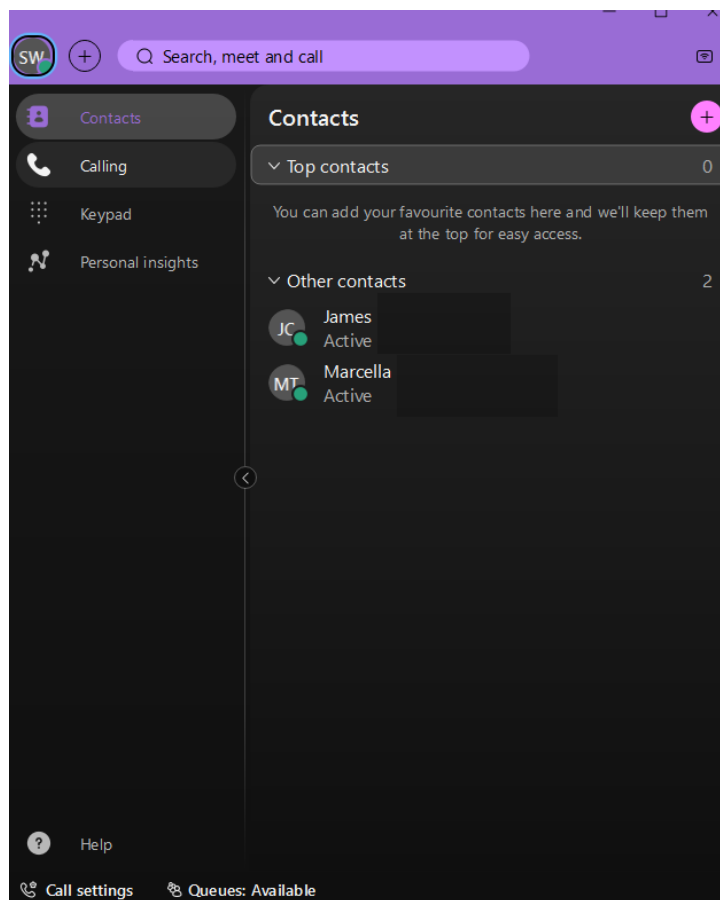
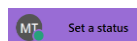









Figure 2 – Softphone Interface

Icon

Definition



Status & preferences

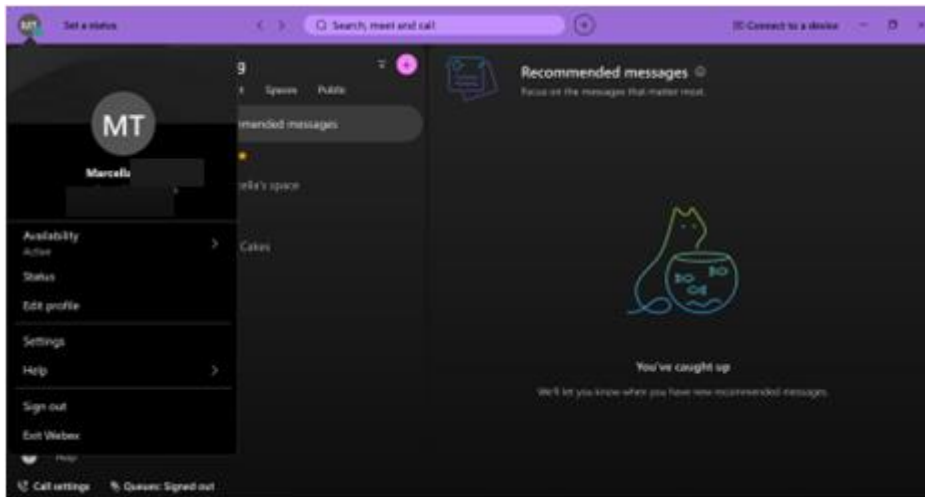
	Messaging
	Teams
	Contacts
	Calling
	Meetings
	Personal insights
	App Hub
	Help
	Call settings

5 Main Webex Features

Please note that links provided to Webex pages in each of the Settings tabs, outline individual settings and steps to view or modify these in more detail, while also providing detail specific to the OS/device being used.

5.1 Status and Preferences

By clicking on the icon in the top left-hand corner of the app, users will be presented with the below Menu.



5.1.1 Availability

- User availability will be set to "Active" by default
- By hovering over the Availability setting, users can select their availability to display as "Busy" or "Do not disturb"
- Both options come with a range of pre-set durations to choose from (30 mins, 1 hour, 2 hours, 7 days, 14 days) or the user can set their own time (between today and tomorrow) until which the selected status will be displayed
- Once set, a message will appear instead of "Active", beneath "Availability", showing the user until when their chosen status will be displayed e.g., "Busy until 16:00"
- This will also change the presence icon next to the user's profile picture depending on the status selected

Presence Icon	Status
	Active
	Busy
	Do not disturb

- Note: the "Do not disturb" option will mute notifications for the user until the status is changed to "Active" or "Busy"
- Users can also configure **Quiet hours** from within the Availability setting by selecting "Manage quiet hours" which will take them to the main Call Settings window where they can choose from Daily, Custom or Off dropdown options. Further information on how to do this is detailed further on in the document.
- For more information visit: [Webex App | Let people know you're busy](#)

5.1.2 Status

- Selecting the **Status** setting will open a pop up where the user can create their own 75-character status message using words and a range of emojis, or they can select from a range of four pre-set status options
- The status message will be displayed for the duration selected in the "Clear after" drop down (30 mins, 1 hour, 12 hours, 1 day, 7 days, or "Set a time")
- For more information visit: [Webex App | Set a Custom Status](#)

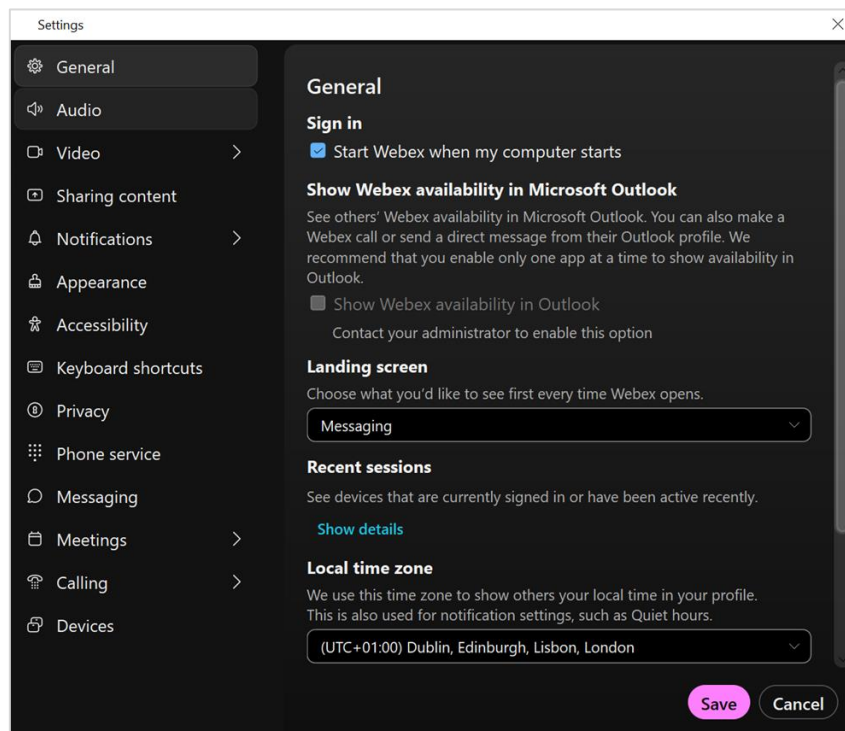
5.1.3 Edit Profile

- By selecting **Edit profile**, users can upload their own profile picture from their device, edit their display name and select from a range of pre-set cover images
- Here users can also view their full phone number and extension
- For more information visit: [Webex App | Edit your profile](#)

5.1.4 Settings

Selecting the **Settings** option will open another window, showing the below main menu options.

NOTE: When all required changes have been made, users must ensure they click the **Save** button shown in bottom right-hand corner of the screen within the settings window, as below, for the changes to take effect.



General

Here users can set and/or manage:

- Application start-up behaviour
- Local time zones
- Multi-tasking window options

Audio

Here users can:

- Set the source for the app ringers & alerts, microphone, and speaker
- Set the volume for ringers & alerts (output), microphone (input) and speaker (output)
- Performing testing on each of the above
- Select auto-adjustment of volume
- Select the ability to unmute temporarily during a meeting or call by holding down the spacebar
- Select from Webex smart audio options (Noise removal; Optimise for my voice; Optimise for all voices; Music mode) which are further explained below each option title
- Enable sound effects
- Within Advanced audio settings, users can select from a range of options relating to audio signal processing on their device. For more detail please hover over the "i" icon next to the dropdown.
- For more information please visit: [Select audio settings for Webex Meetings and Webex Webinars](#)

Video

Here users can:

- Preview their camera image
- Rotate their camera view
- Select their camera source e.g. integrated laptop camera or a separate camera device
- Adjust camera settings e.g. Mirror mode, Zoom to fit, Adjust my video (automatic/manual adjustment of brightness, contrast and colour saturation)
- Set maximum preferred camera resolution
- Select from self-view options for when in meetings
- Enable/disable GPU acceleration for virtual background
- Set video capture source
- Select and preview a range of pre-set virtual background options or upload their own image to use as a virtual background
- For more information visit: [Select video settings for Webex Meetings and Webex Webinars](#)

Sharing Content

Here users can enable/disable the following advanced settings, outlined by hovering over the "i" icon next to each setting:

- Use of GPU acceleration to optimise content sharing as needed (on by default)
- Revert to classic content sharing (off by default)
- Limit content sharing to 15 frames per second (off by default)
- For more information visit: [Webex App | Share content in a meeting](#)

Notifications

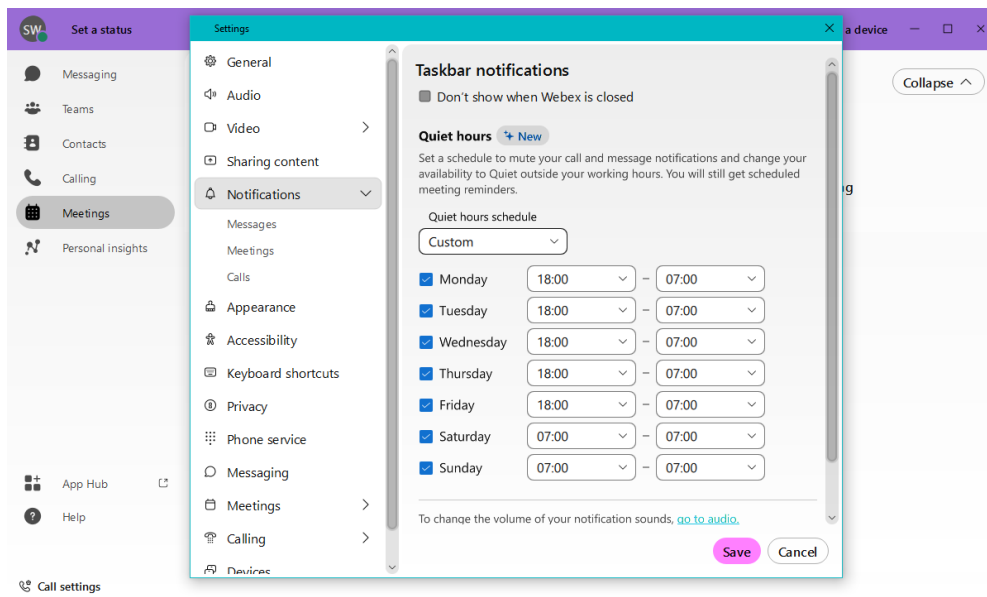
Here users can:

- Set quiet hours (either Daily, Custom or Off) where they will not receive notifications from Webex
- Manage notification settings for Messages, Meetings and Calls separately, including **Notify me for** in Messages, notifications for upcoming meetings, setting a ringtone, and assigning notification sounds to specific meeting actions.
- For more information visit: [Webex App | Tips for managing notifications](#)

Quiet Hours

With Webex the user can create a schedule that will mute all notifications and incoming calls during a specific time frame. It also changes their availability to let others know they're in quiet mode.

- On the **desktop app**, click on **initials**, select **Settings**, select **Notifications**. Quiet hours are then displayed on the right-hand side.
- Here the user can choose an option:
 - **Off**: no quiet hours schedule.
 - **Daily**: select a daily time range and select the days on which the quiet hours schedule should repeat.
 - **Custom**: as shown below, select a specific time range for individual days and select the days in which the quiet hours schedule should repeat.
- Remember to click **Save** when amending the quiet hours.



- On the **iOS app**, click on **initials**, select **Settings**, select **Notifications**, and select **General**.
- On **Android**, click on **initials**, select **Settings**, select **Notifications**, select **General** and go to **Quiet hours**.

Alternatively, on both iOS and Android, tap **initials** then select **Availability** and **Manage Quiet hours**.

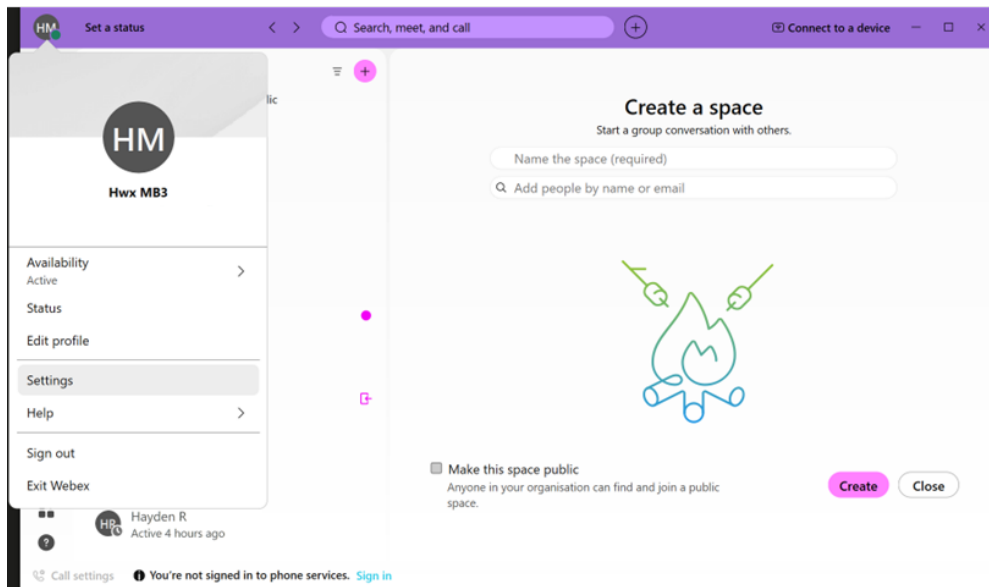
Appearance

Here users can:

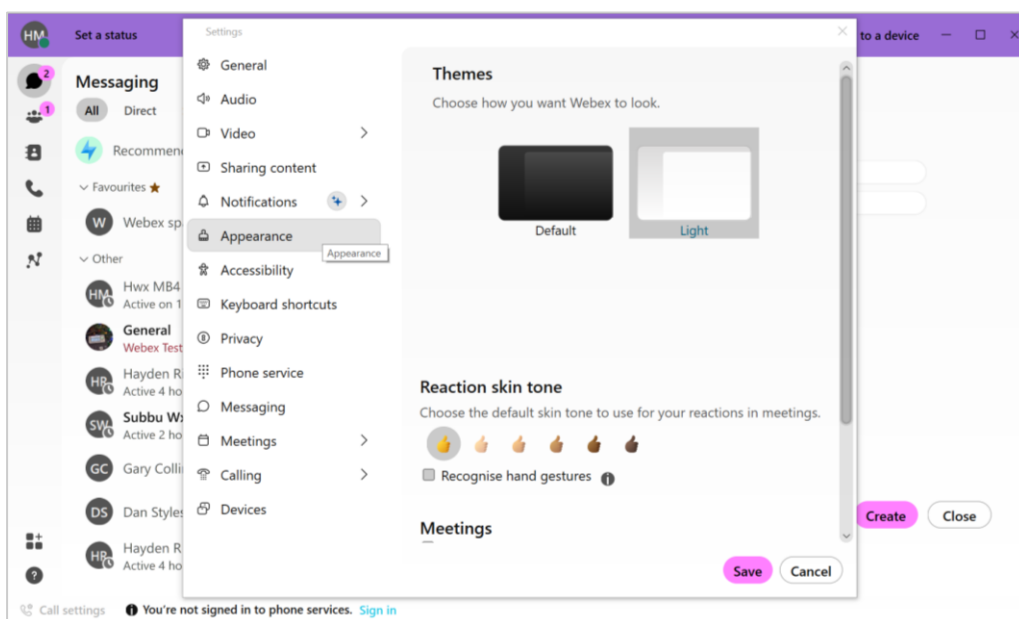
- Apply their preferred theme from Light or Default (Dark Mode)
- Set their default reaction skin tone from a range of options

Light and Dark Mode

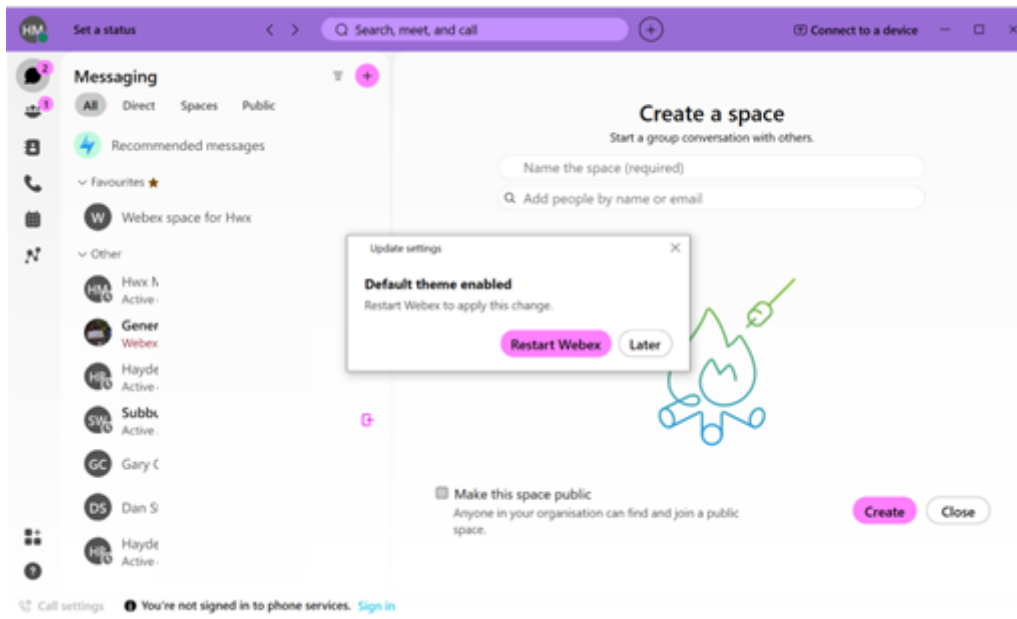
1. Users will be required to log out and log back into the Webex app for the dark mode on/off selection to become available as this will be enabled across all users. To make changes to the theme please follow the steps below. Select **Settings** within the main menu of the application.



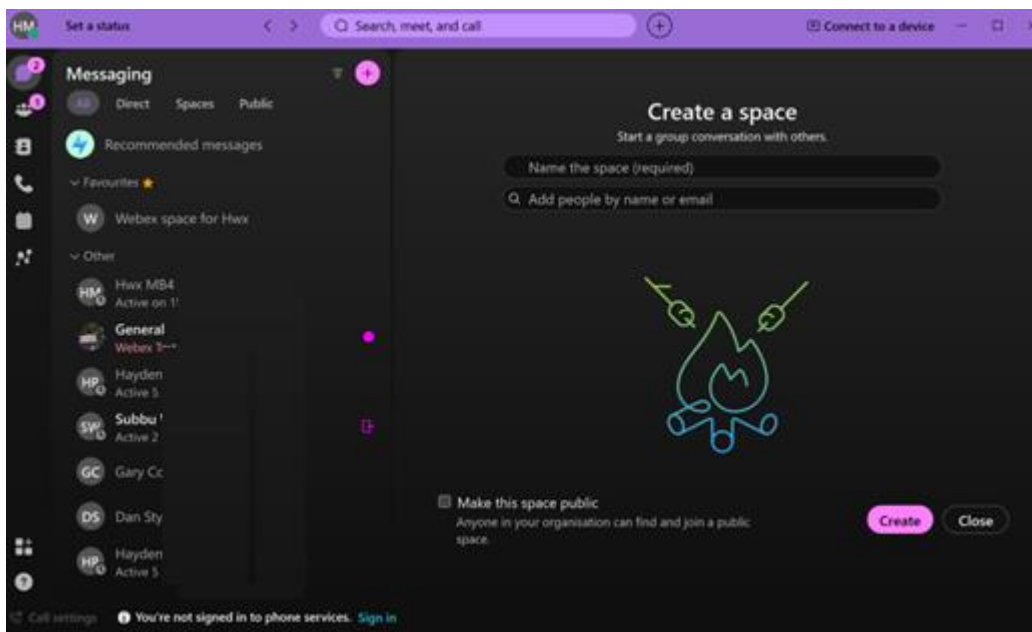
2. Select the option **Appearance**, within the settings menu below **Notifications**. **Default** (dark mode) will be automatically selected as the theme. Users should select their preferred theme and click **Save**.



- The below window will pop up and **Restart Webex** will need to be selected for changes to be applied immediately. This will restart the application without logging the user out. If the user selects **Later** to delay the restart process, they will need to exit Webex and open it again for the new theme to take effect.



- Once the restart has completed, the user's selected theme will be applied.



Accessibility

Here users can:

- Change the font size for messages
- Select which notifications will be read out when screen reader is enabled
- For more information visit: [Webex App | Screen reader support](#)

Keyboard Shortcuts

Here users can:

- Switch on, edit, or remove keyboard shortcuts for general actions, messages, formatting, and meetings & calls
- Make specific shortcuts global within Meetings & Calls, such as answer call or mute/unmute to enable use of keyboard shortcuts while the app is minimised or in the background. Global shortcuts can be switched on by ticking the box next to the shortcut the user wishes to enable. Note: some shortcuts will not be available for Global switch on
- For more information visit: [Webex App | Keyboard navigation and shortcuts](#)

Privacy

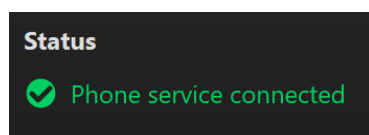
Here users can:

- Enable/disable the display of their availability and status
- Hide/unhide their availability and status from certain users by clicking the "Add" button within the tab

For more information visit: [Webex App | Hide your availability and status](#)

Phone Service

Here users can view their phone status; to ensure calls can be made from the app, the message under "Status" should be as below:



Messaging

Here users can:

- Enable/disable spell checking and set the language to spell check
- Change their default file download location by browsing their files
- Manage view settings for Space lists and Threads
- Enable/disable read receipts
- For more information visit: [Webex App | Turn off read receipts](#) and [Webex App | Change your download location](#)

Meetings

Here users can:

- View their default Webex site URL
- View their Personal Meeting Room (PMR) details including their sharable link which can be copied from this tab and sent to meeting participants for easy access

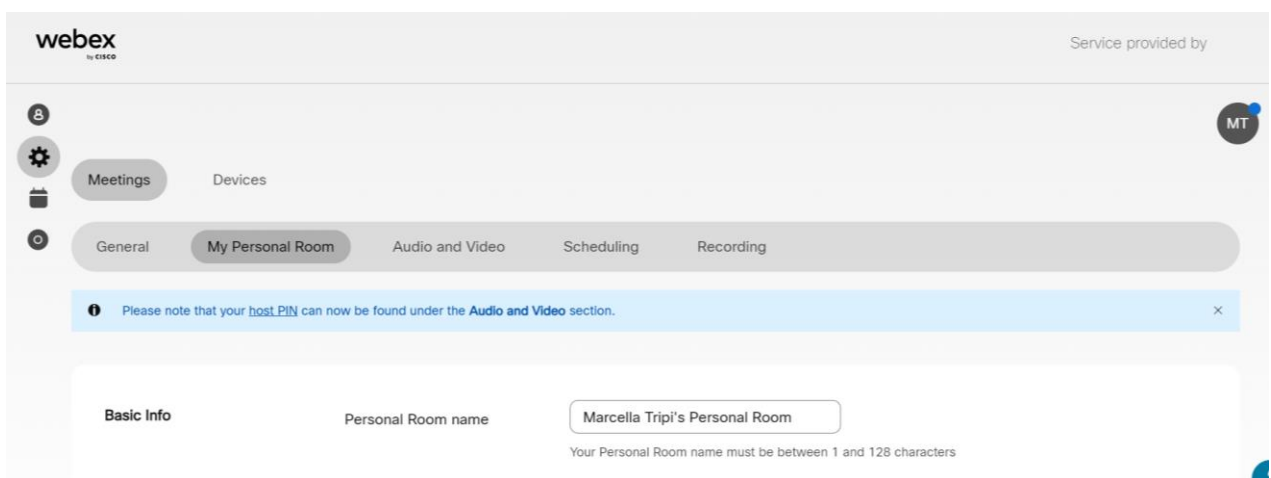
- Manage join options and move meeting options between devices
- Select the number of participant videos to be displayed in a meeting per page for the standard grid view layout

Setting Personal Room Preferences in User Hub

Depending on licence tier, users can edit certain aspects of their PMR by clicking on the link found when the user scrolls to the bottom of the Meetings tab as below:

[Edit my personal room on the Webex site](#)

- This will open a tab in their internet browser, linking the user through to User Hub to view or modify settings related to their PMR as below. Certain customisations will only be available to Premium users – please refer to the feature matrix within the Overview section of this document to view features available by licence tier
- **Please note:** User Hub is not available for Softphone



- Within the Meetings tab drop down of the Webex app setting
- For more information visit: [Set your Personal Room preferences \(webex.com\)](#), [Set your meeting join preferences in the Webex Meetings](#) and [Webex App | Meetings experience](#) (for general detail)

Calling

Here users can:

- Tick on/off the ability to answer incoming calls with video on by default
- Set call forwarding policies and numbers to forward calls onto
- Manage call window settings
- Modify advance call settings for incoming and outgoing calls such as simultaneous ring, call waiting, and “block my caller ID” by clicking on the “Advanced call settings” link below which will open a new window with these further call setting options:

Additional call settings

[Advanced call settings](#)

- Modify multi-call window settings – please read [Configure multi call window for Calling in Webex App \(Unified CM\)](#) and [Webex App | Manage all your phone calls in one place](#) for further detail on this feature.
- For more information on calling using Webex visit: [Get started with Webex App](#)

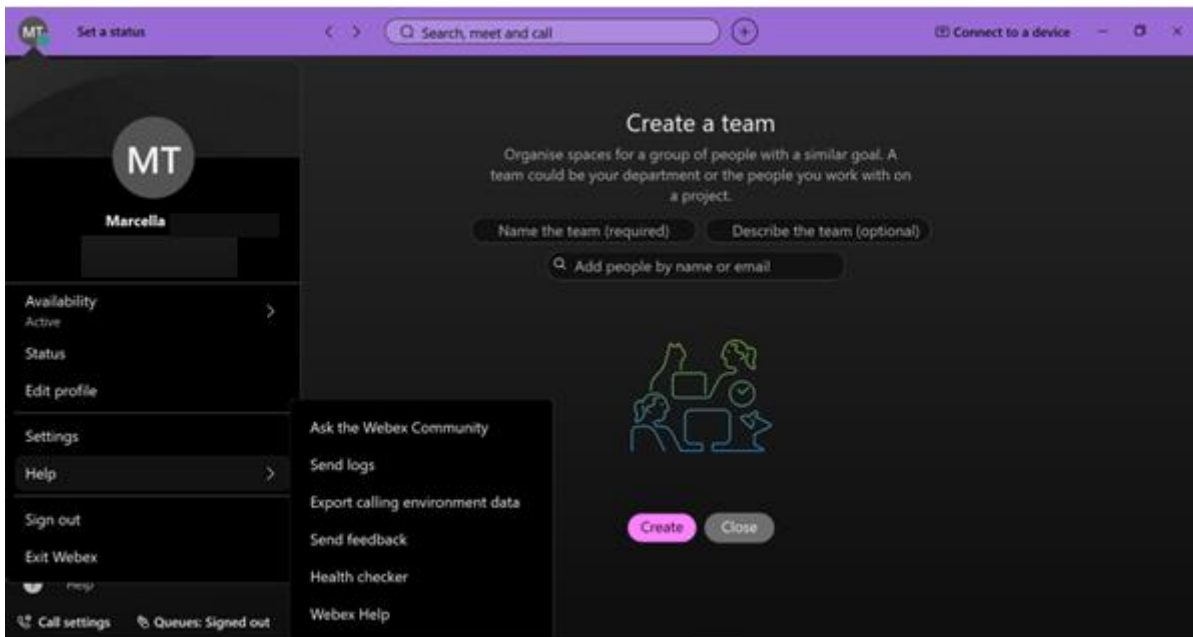
Devices

Here users can:

- View activated Cisco devices and accessories
- Enable automatic updates to download and install any available firmware updates
- Enable/disable automatic connection to nearby video devices using the microphone on their computer
- Enable/disable use of Wi-Fi to detect nearby devices
- For more information visit: [Manage discovery of nearby Webex devices](#)

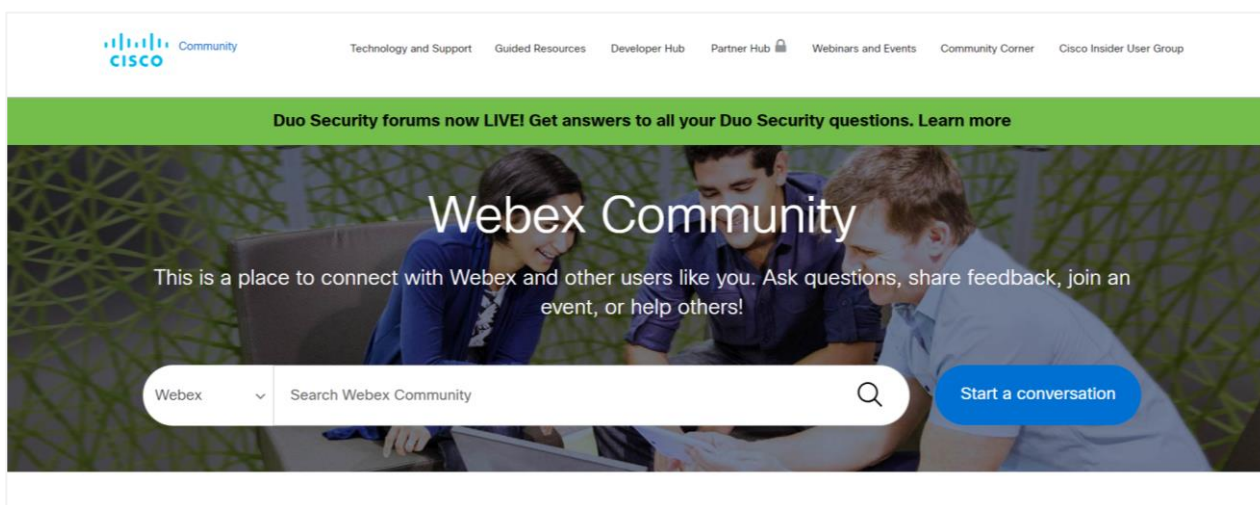
5.1.5 Help

Hovering over the “Help” section will display a set of useful features as shown and detailed below:



Ask the Webex Community

- Selecting this option will open a new window/tab in the user's default browser linking the user to the Webex Community – shown below – where they can find learning content and start conversations in a forum with other Webex users and experts to discuss Webex, find answers to issues, and browse recent conversations



Send Logs

- Selecting this option will send logs directly to the Webex Cloud which BT support may need when requesting additional technical support on an issue from Cisco.

Export calling environment data

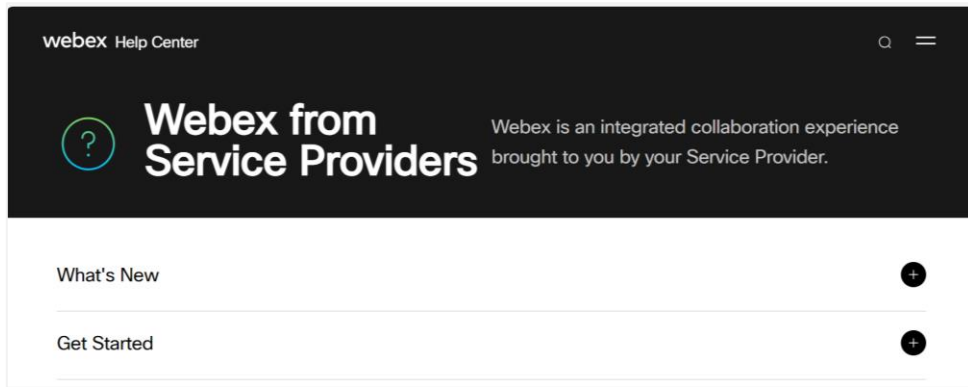
- Selecting this option will allow the user to export and locally store calling data which BT support may need when requesting additional technical support on an issue from Cisco.

Health checker

- Selecting this option displays and allows the export and local storing of diagnostic information which BT support may need when requesting additional technical support on an issue from Cisco.

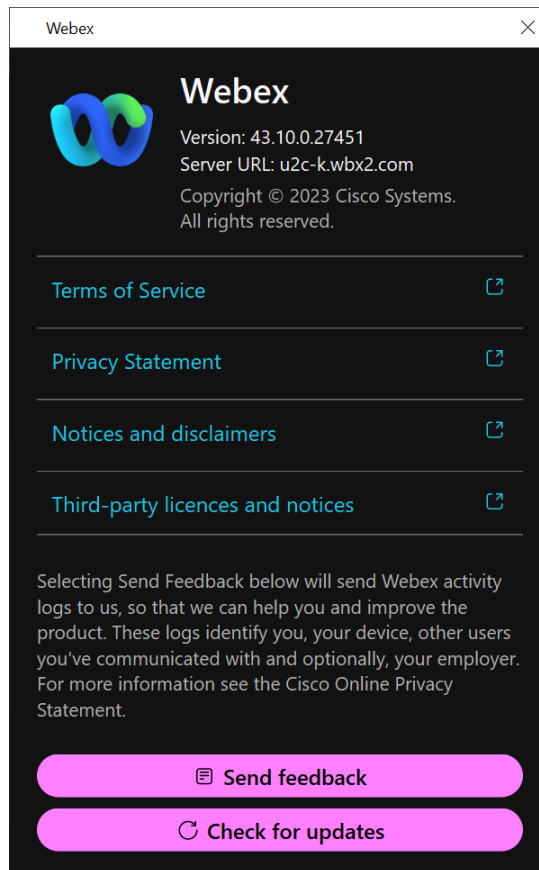
Webex Help

- Selecting this option will open a new window/tab in the user's default browser linking the user to the Webex Help Centre for Webex from Service Providers – shown below – where users can find useful articles to learn more about and better manage their Webex application.
- Please note that any detail within this guide supersedes any information provided in the Webex Help Centre where it may differ



About

- Selecting this option will open a new window/tab in the Webex app – as below – showing the version of the app it is currently running on and the Server URL
- Here users can also check for updates to the application version




5.1.6 Sign Out

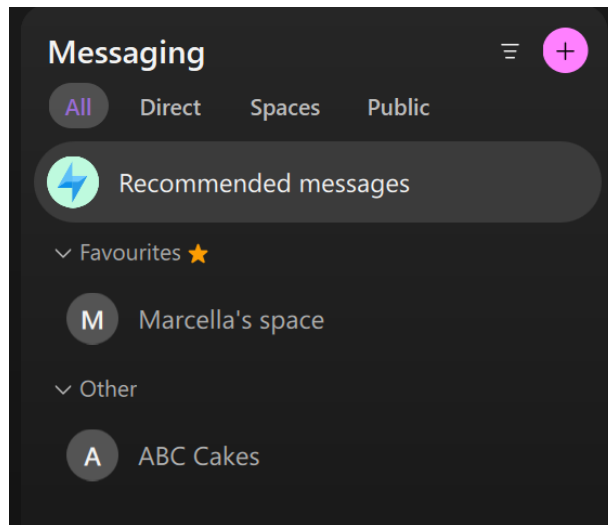
- Selecting this will sign the user out of the Webex app completely – their login credentials i.e., email address and password will be required to log back in again

5.1.7 Exit Webex

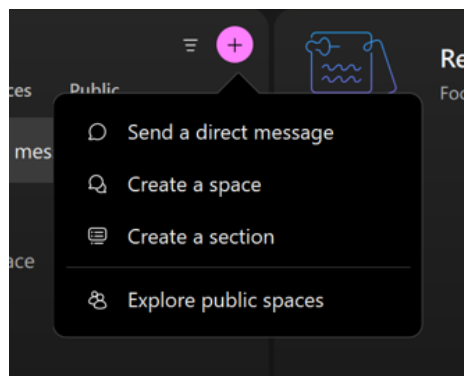
- Selecting this will close the Webex application but once this is opened again the user credentials will be used to automatically log the user back into the application without the need for them to re-enter their login credentials

6 Messaging

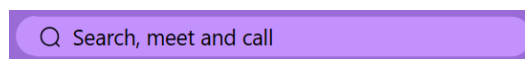
- For quick access to messages, users should select the Messaging icon  which will redirect them to the messaging tab where they can send messages to individual contacts, within Spaces (group chats) or to public Spaces, as shown below:



- They can do this by selecting from existing chats or creating new interactions by clicking on the "+" button next to the Public Spaces tab as below:



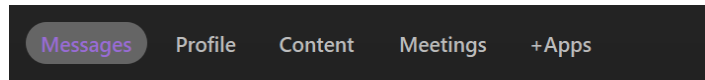
- Users can select the filter icon next to the "+" button to filter by message type or customise the appearance and headings displayed within the Messaging tab
- Users can also search for contacts using the main search bar, as shown below, at the top of the Webex application window. Internal contacts can be searched for by name, phone number or email address. External Webex users will need to be searched for using an email address



- The icons below indicate the messaging features available in the message window. From sending attachments, screen capturing, format text, adding emoji's/symbols, GIFs, Bitmoji stickers, @ mentions and invites to personal rooms




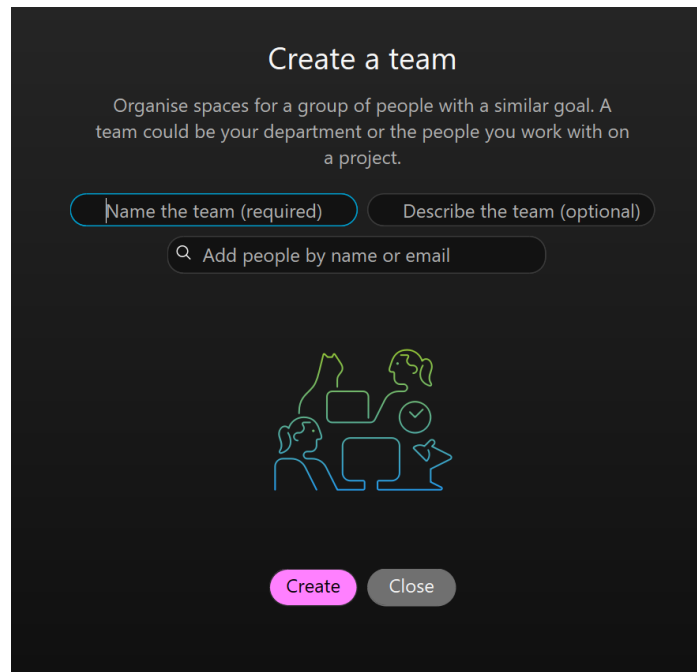
- In the direct messaging window below, users can also view the profile of their contact, see shared content, create whiteboards, share links/add website shortcuts, and schedule a meeting or leverage the use of shared or 3rd party apps within the chat



- For further information on getting started with messaging ([Get started with Webex App](#)) or exploring Webex's messaging potential ([Webex App | Messaging](#)) direct end users to the relevant link.

6.1 Teams

- Teams can be created by users to organise spaces (group chats) for users who are, for example, working on various elements of the same overall project or belong to the same department
- By selecting the Teams icon , users will be taken to the Team tab where they will see the below screen. Here they can create a team by filling in the fields of "Name the team", "Describe the team" which is optional and adding contacts to join the team using names or emails
- Once all required details have been entered, they can simply press the "Create" button to finish creating the new team



Create a team

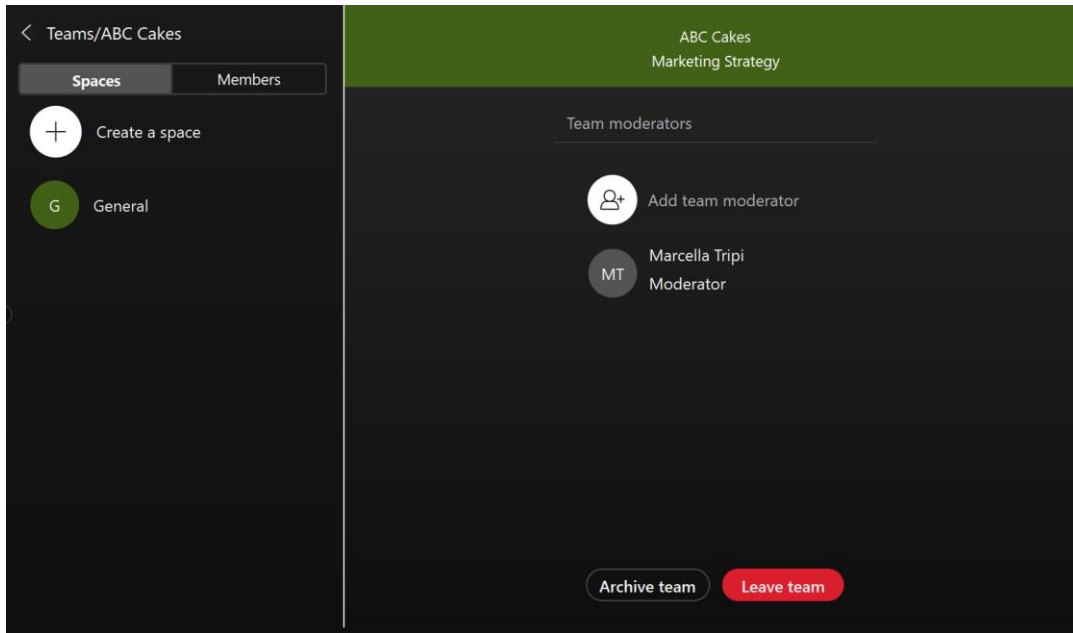
Organise spaces for a group of people with a similar goal. A team could be your department or the people you work with on a project.

Name the team (required) Describe the team (optional)

🔍 Add people by name or email

Create Close

- The user who created the Team will be assigned as team moderator and can add further members as moderators by clicking the "Add team moderator" option, as below
- Members/moderators can also opt to leave the team by clicking the "Leave team" button below or archive the team which will hide the team and all its Spaces from all members



6.1.1 Creating a Space

In the Webex app, when a user sends a new message to a group of contacts for the first time, a Space is created for the group to talk. Spaces work best for a group of people collaborating on a specific topic within a wider department or project.

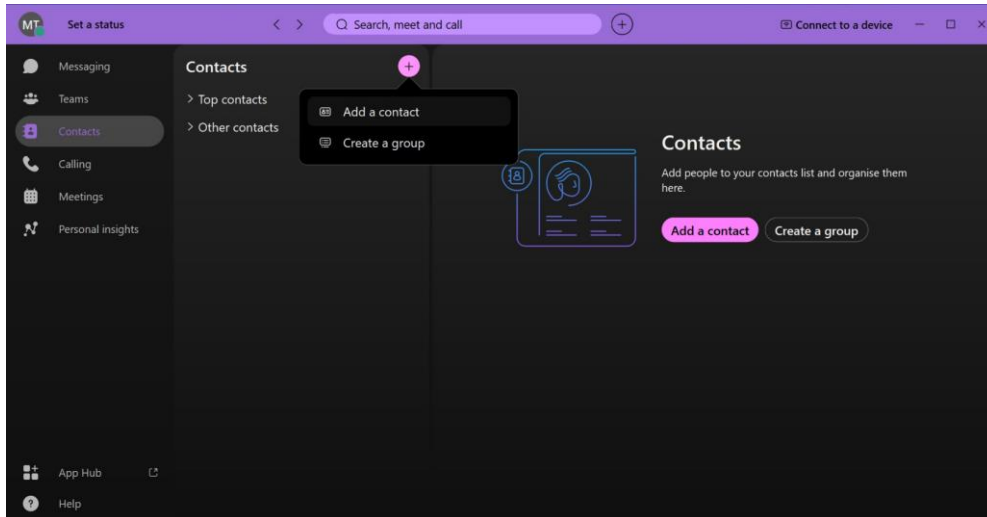
Users can send messages, make calls, have audio & video meetings, share files, and use whiteboards. The next time the user messages the group, the conversation resumes from the last message received/sent.


- A "General" Space will automatically be created under the Spaces tab for all members of the team to be able to message, meet, call, share content and more
- Moderators and members also have the option to create further Spaces within the team with only certain members
- Clicking on the Members tab in the screen above will allow moderators to add new members and view existing members of the Team and it will allow members to view other members within the team
- For further information on creating Teams and Spaces visit: [Webex App | Create a team](#) and [Webex App | Create a space](#)

6.2 Contacts

Contact from a user's local mobile or enterprise directory can be added to their Webex contact list. The limits are as follows:

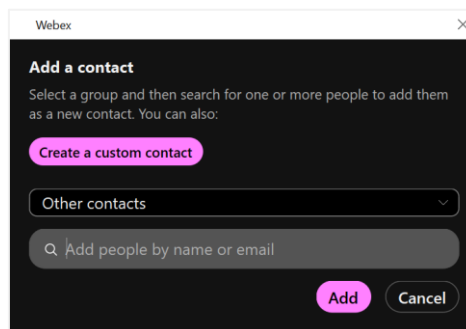
- Enterprise Contacts: 30,000
- Group-level contacts: 30,000



1. To add a contact, the user should select the contacts icon , where they can add a new contact by selecting the "Add a contact" button as shown in the above screen or by selecting the "+" icon below and choosing "Add a contact"



2. The user can then select whether they would like to add a contact under "Other contacts" from the dropdown shown in screenshot below or under "Top contacts".



3. The user must either create a custom contact using the button in the above screenshot or begin searching for a contact using their name or email address
4. They must then select the "Add" button
5. The contacts added then appear in the contacts tab, categorised as Top contacts or Other contacts
6. Users may also wish to create contact groups to further categorise specific contacts – any categories created will then be shown in the dropdown when adding a new contact

For Mobile devices, as part of the initial set up process, users can allow Webex to access their existing contacts list on their device to integrate their personal contact list

If users are searching for a Webex contact outside of their organisation, they must search using the contact's email address.

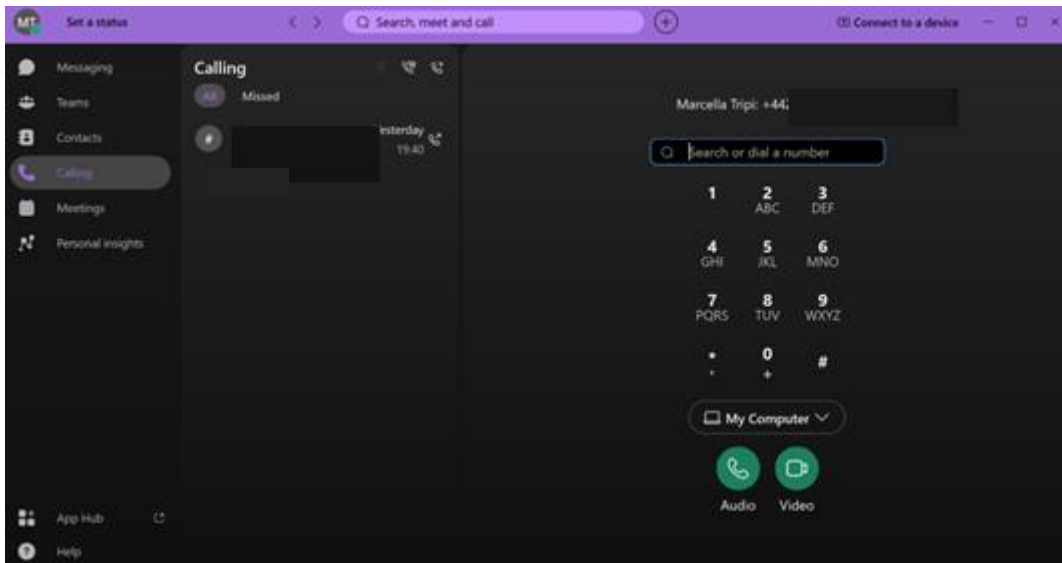
Will I have access to my contacts in the Enterprise Directory on the Business Portal?

Yes – contacts within the company's Enterprise Business Directory will be available within the Webex app along with site, local and personal contacts.





Users can search for their contact via name, telephone number or email address in the Search bar at the top of the application screen. Once found, the user then selects the required contact and can add them to their contacts in the Webex app.

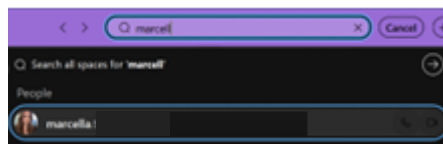
Please Note: when contacts are added to the Enterprise Directory in the business portal companies should allow up to 24 hours for changes to sync with the Webex app before the new contacts can be searched for as above.

6.3 Calling




6.3.1 How to Make a Call

1. Users can select the calling icon  or the  button next to search bar to open the calling section which includes a dial pad, call history (with separate tabs for all calls and missed calls, as above), one-click access to voicemail and audio or video call options
2. Users can then dial the number directly into the dial pad, select the device they would like to place the call from, and choose from audio  or video  calling buttons to initiate the call
3. Users can also search for a specific contact to audio/video call using the search bar to place a call directly, without needing to open the calling section

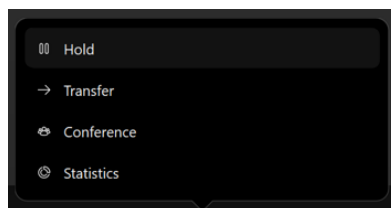


4. After the required contact has been identified, the user can simply click the Audio Call or Video Call icons next to the contact

Please note: Direct video calls can only be made to other Webex users

Users can also make a call by selecting the Contacts icon , where they can hover over their contacts to make an Audio or Video call.

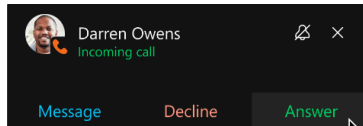
During a call, users can also perform the below actions by selecting the more options icon  next to the end call button at the bottom of the call window:



6.3.2 Answering a Call

When a user receives a call, they'll see a notification allowing them to:

- Answer: to take the call
- Decline: if they can't answer now
- Message: if they want to answer with a chat message instead (only applicable to calls from another Webex user)
- Hold meeting & answer: for users who are in a Webex scheduled meeting, a Personal Room meeting, or a meeting associated with a space, but want to take the incoming call. Video and audio are paused in the meeting until they are finished with the call. Their name remains in the Participants list and they continue to see any content that's being shared in the meeting



- For more information visit: [Webex App | Answer a call](#)

Please note:

- All calls are made over the WHC service to enable the use of all call features, such as Call Recording, Voicemail, Hunt groups etc.
- On Mobile devices without voicemail, when declining a call (without answering) it can take a few declines to stop the call ringing

6.3.3 Transferring a Call to Someone Else


When the user is on the phone, whether that's a call they've received via automatic call distribution or it's someone who has called the user directly, they're able to transfer the call to someone else.

There are 2 ways in which this can be done.

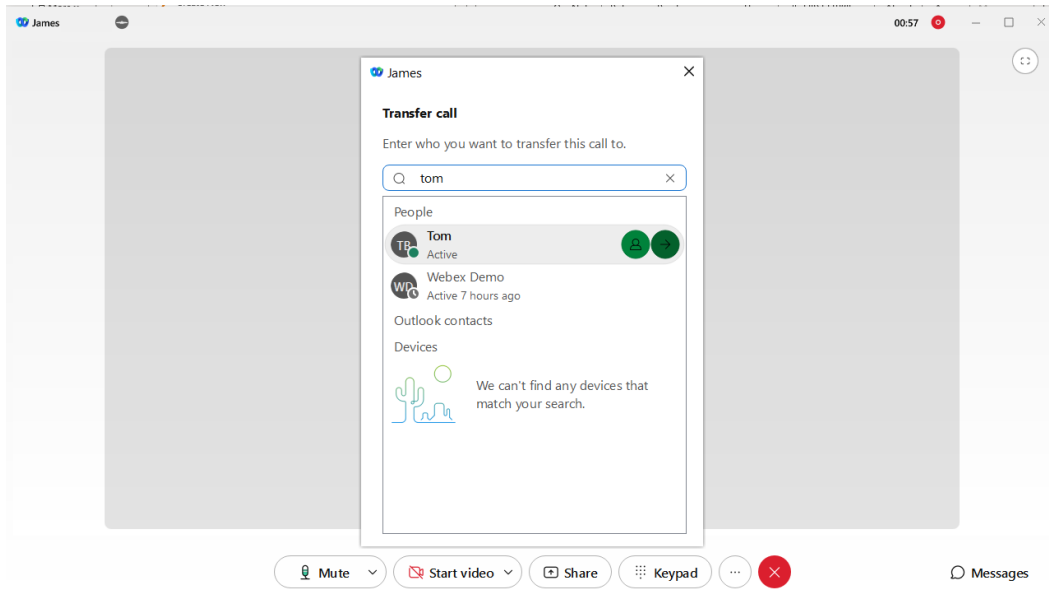
Direct Transfer

The user can transfer the call to someone else without consulting with them first. This will put the caller directly through to the person the call has been transferred to.

Under the **more options** button  select **Transfer**.


Search for the contact to transfer the call to and click the  button.


This will transfer the caller directly through to the other person.



6.3.4 Consult Before Transferring

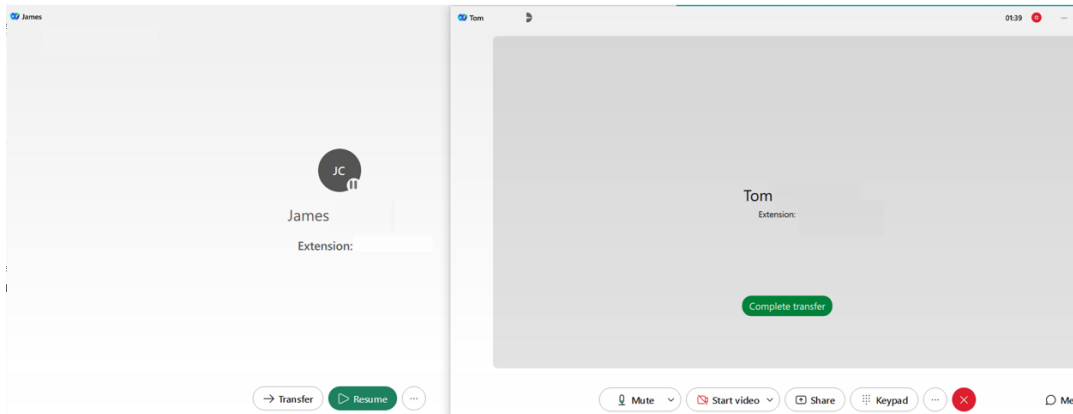
Before transferring a caller through to someone else, the user can have a conversation so that the person receiving the call knows why the call is being transferred.

Under the **more options** button  select **Transfer**.

Search for the contact to transfer the call to and click the  button.

This will start a call consult; the caller will be placed on hold so that a conversation can be had with the person who will be receiving the transferred call.

Once the users have finished consulting, the user can either click **Complete transfer** to transfer the caller through or can click **Resume** which will drop the transfer and enable them to speak to the caller again.



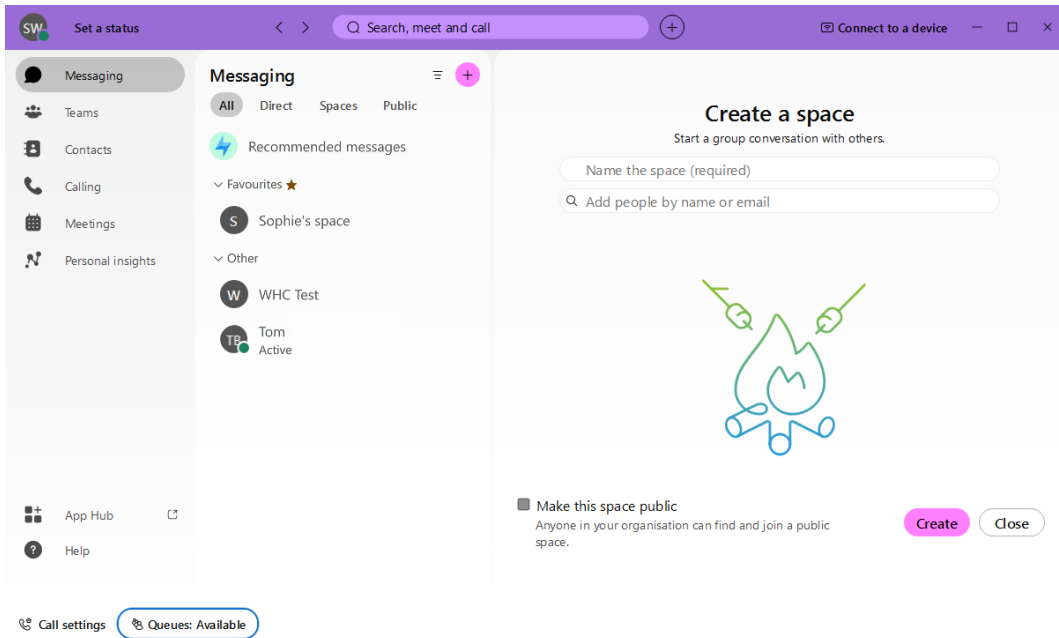
[Click here for further information on transferring a call with Webex](#)

6.3.5 Using Call Queues in Webex

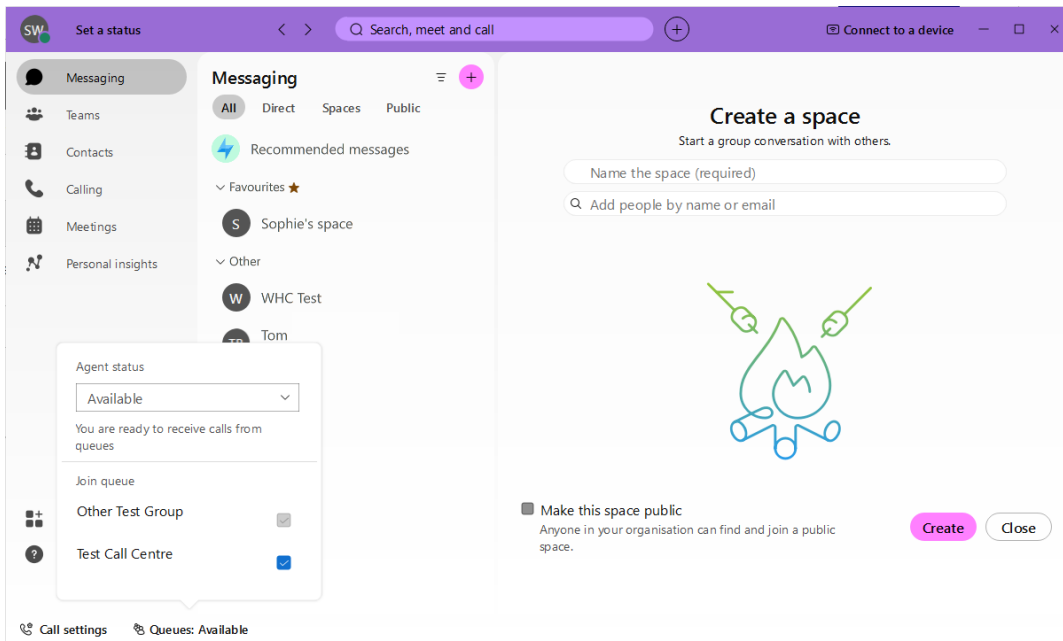
On the Business Portal (BP) the user can be assigned to call centres, utilising automatic call distribution (ACD). When a call is made into the call centre number, the call will be queued and then routed to the assigned users according to the call centre distribution policy and other applied settings.

When the user is assigned to other call queues, they will see **Queues** appear in the bottom left-hand corner of the Webex desktop app.

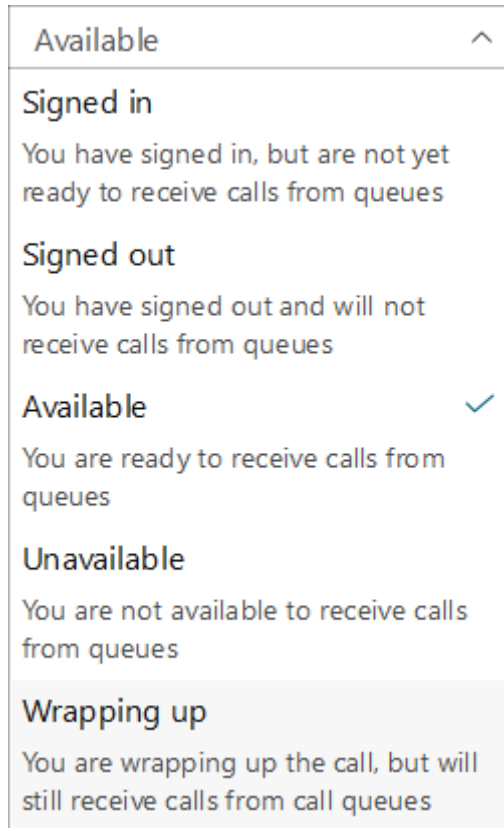
Please note: Call centre functionality will incur separate license costs.



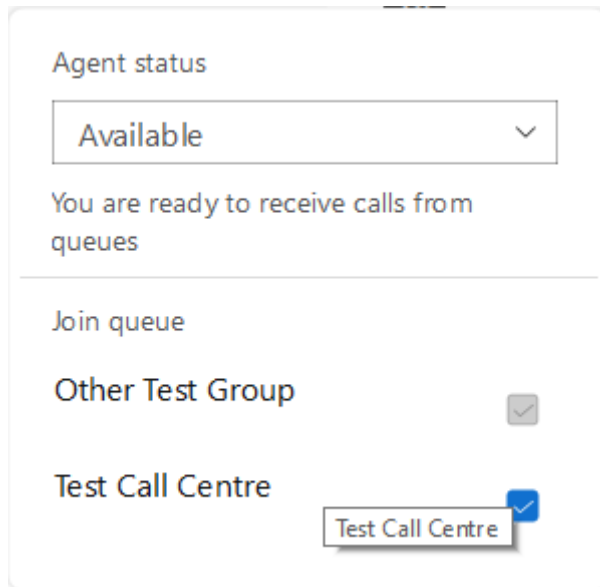
Clicking on **Queues** will open a pop-up.



Here users can change the **Agent status**:



Clicking on **Queues** will also display the call queues the user is assigned to:



Other Test Group is greyed out showing that the user cannot login or logout of this call queue.

Test Call Centre has a blue tick which shows that the user can login and logout of this call queue.

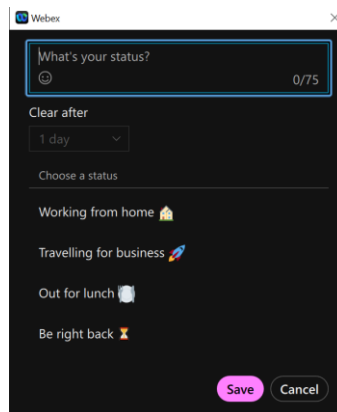
The settings for each queue are managed within the Business Portal and here admins can select whether a user is able to login/logout of the call queue or not. The below screenshot from Business Portal shows that users are not allowed to login or out of the queue.

Assigned user settings

Allow users to log in/out	No
Allow call waiting	No
Allow calls in wrap up state	No
Users state after call	Available
Timer for wrap up state	No
Manage >	

How do I set my status/presence?

- Users should refer to the Main Webex Features > Status & Preferences > Availability and/or Status sections of this document for full details on how to modify these



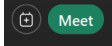


6.4 Meetings

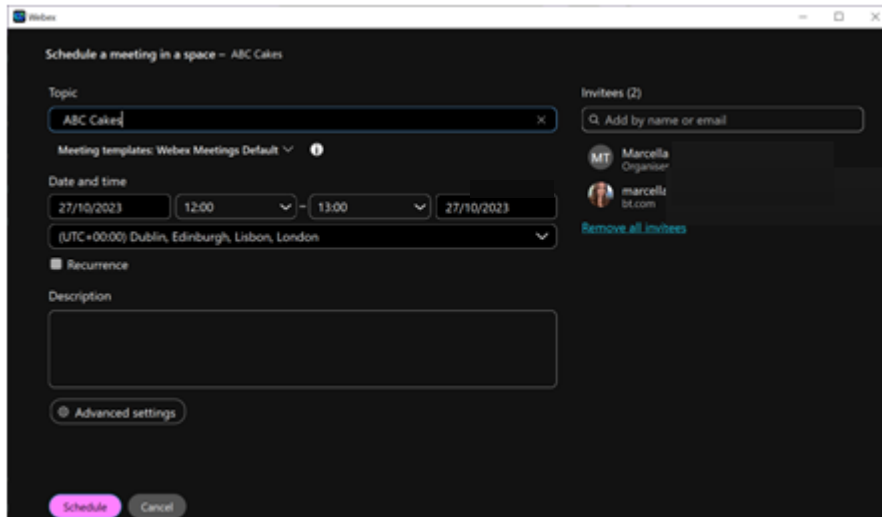
There are 2 types of meetings available within Webex:

1. Space meetings: These meetings are initiated or scheduled from within a specific Space
2. Personal Room Meeting: For these meetings the user has access to their own PMR and so can hold instant or scheduled meetings within the PMR

6.4.1 How to start/schedule a meeting in Webex

For a Space meeting:

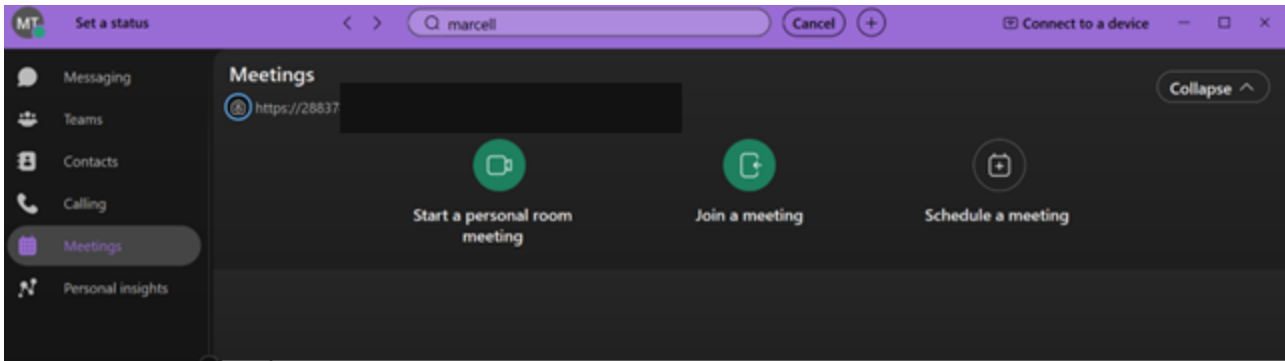
- From within the Space, simply click on the “Meet” or “Meeting Scheduler” buttons 
- When selecting , the meeting will start immediately and everyone within that Space will see a Join pop up in their meeting list and Spaces list, or receive a notification if using their mobile device, prompting them to join the meeting
- Alternatively, users can schedule meetings from within a Space by selecting  to open a new window to the meeting scheduler which will automatically include all Space participants. However, any participants who need to be removed can be done so by clicking the “x” icon next to their name on the invitees list
- Further attendees can also be added into the scheduled meeting using the search bar below “Invitees”
- The user should now populate the meeting information required and set the recurrence. The meeting Topic will also be prepopulated using the Team name but can be changed as below:



- By selecting the “Advanced settings” button below the description box, users can customise security, audio connection, and scheduling options in advance such as Auto admit, Auto lock, Mute preferences for attendees and co-host settings.
- The user should then click “Schedule” for an email to be sent to their set email address with an invite to the Webex meeting which they can accept to add this meeting to their existing email calendar.
- For further information please visit: [Webex App | Schedule a meeting from a space](#)

For Personal Meeting Room meetings on desktop:

Selecting the Meetings icon  will direct the user to the main Meetings screen below:



- Here the user has the option to start a Personal Room Meeting, Join a meeting or Schedule a meeting. They can also copy their PMR link as below to shared directly with required invitees via email, chat, etc. to add them directly to the user's PMR



- Starting a personal room meeting will add the user to their own PMR where they can join the meeting with invitees who have been sent their PMR link.
- Alternatively the user, as a host, can add invitees after joining the meeting by clicking "Participant" in the Menu Bar (below) > Invite and Remind... to add the invitees via email or select invitees they would like to remind of the meeting



Meeting scheduling options

Webex Meeting Scheduler:

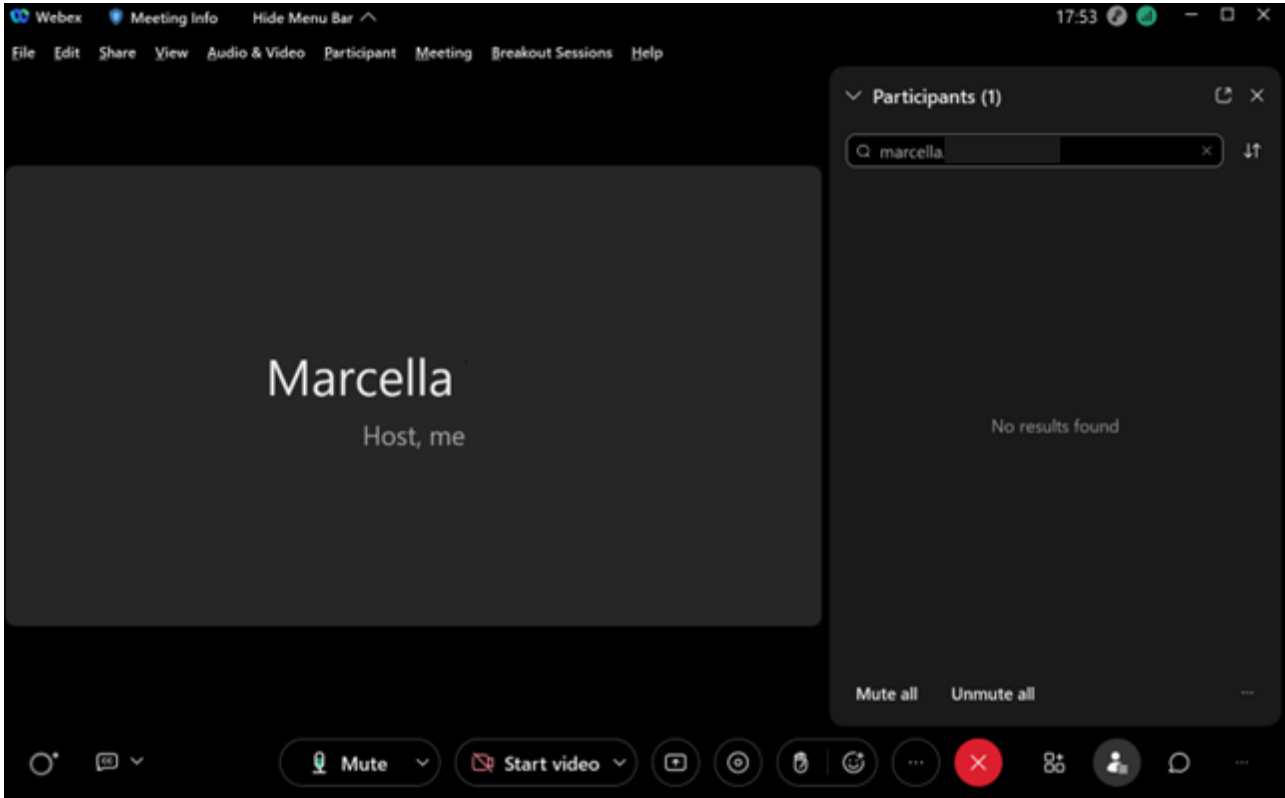
[Webex App | Schedule a meeting from the meetings calendar](#)

Scheduling options:

[Schedule a Webex Meeting](#)

Please Note: currently, users must schedule meetings using the Webex Meeting Scheduler if they want to schedule meetings from within the app

In a Meeting:



Once the user has started their Personal Room meeting, the above screen will appear. Under the more options button they can also invite people to their personal room after a meeting has started, copy the meeting link, lock the meeting, and enable Breakout sessions etc. There is also a Chat function at the bottom right of the window if the user would like to message other meeting participants.

Personal Room Meetings on Mobile

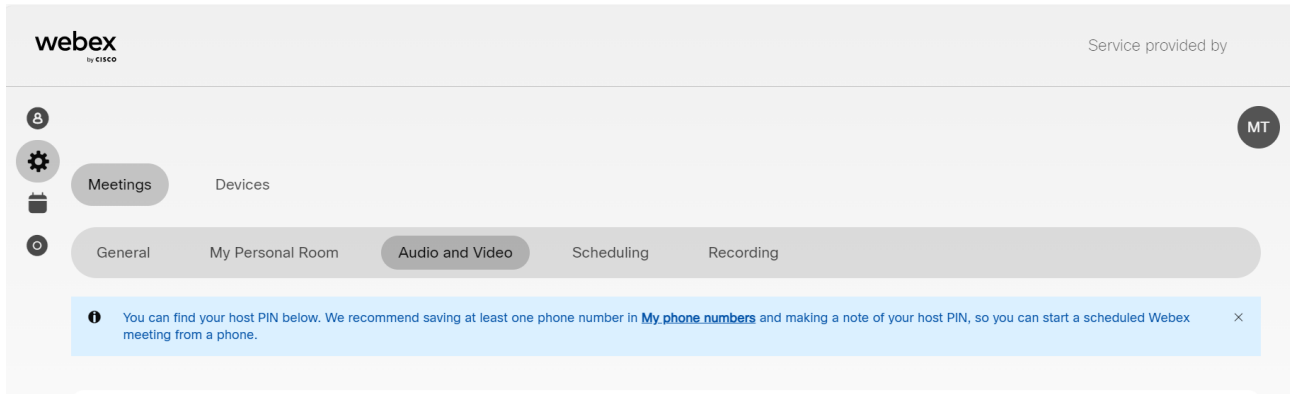
When the user first selects the option to run a meeting on their mobile using the Meeting icon, they will be asked to install the Webex Meetings application alongside their Webex application – this will enable the meeting to run within the Webex app. The user will need their email address, application username and password to set this up. The app can be downloaded from the device's App (iOS) or Google Play (Android) store by searching for Webex Meet.

Once set up, the Webex Meetings application will ask for permission to access the user's Webex calendar. This will enable the calendar functionality within the Webex App and sync any meetings within their calendar so they can be joined via the user's mobile app. The Webex app itself does not provide calendaring capability; it simply links to their existing calendar.

For further information please visit: [Use the Webex Meetings mobile app](#) and [Connect to Webex Meetings from a mobile device](#)

6.4.2 Dialling into a Meeting (Call Conferencing)

Any numbers mentioned below can be found within the Audio and Video tab in User Hub as shown below:



Host Enters the Meeting First

Host Enters

- The Host dials their personal conference number and hears the message:

“Welcome to Webex. Enter you access code or meeting number followed by the #”

- The Host dials their host access code and hears the message:

“The meeting has not started yet. If you are the meeting host, enter the host pin followed by a #. If you are not the host, press the # key”

- The Host dials the **Audio Pin** and hears the message:

“You are the first person to join the meeting, please stand by”

Guest Enters

- The Guest dials the host's personal conference number and hears the message:

“Welcome to Webex. Enter you access code or meeting number followed by the #”

- The Guest dials attendee access code provided by the host and hears the message:

“Enter your attendee ID number, followed by a #. If you are not the host, press the # key to continue”

- The Guest dials # and is then followed by an entry 'beep' and the meeting has started.

Host Leaves the Meeting

- Attendees hear message “The Host has left the meeting, this meeting will end in 5 minutes”

Guest enters meeting first

Guest enters

- The Guest dials the host's personal conference number and hears the message:
"Welcome to Webex. Enter you access code or meeting number followed by the #"

- The Guest dials the attendee access code provided by the host and hears the message:
"The meeting has not started yet. If you are the meeting host, enter the host pin followed by a #. If you are not the host, press the # key"

- The Guest dials # and hears the message:
"The host has not joined the meeting, please stand by." This is then followed by hold music

Host enters

- The Host dials their personal conference number and hears the message:
"Welcome to Webex. Enter you access code or meeting number followed by the #"

- The Host dials their host access code and hears the message:
"If you are the meeting host, enter the host pin followed by a #. If you are not the host, press the # key"


- The Host dials the **Audio Pin** and is added to the meeting/conference bridge.

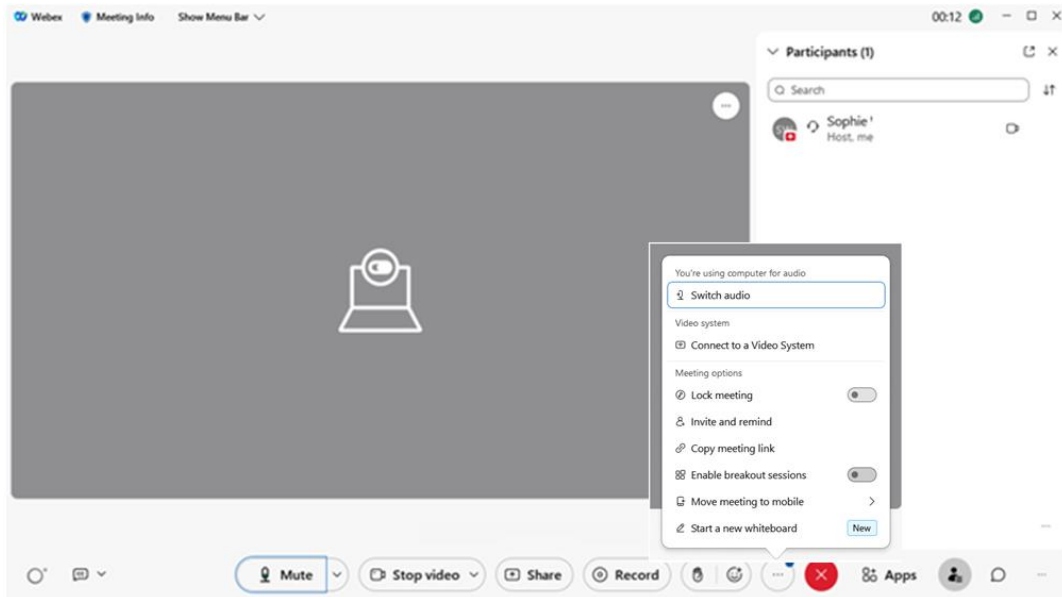
6.4.4 Breakout Sessions

Whilst in a meeting the user can use breakout sessions to split off from the main meeting. This is especially good for workshops or if a private conversation between a few participants is needed.

Hosts and co-hosts can create breakout sessions, assign participants* and start/end the sessions.

*only the host can preassign participants to a breakout session.

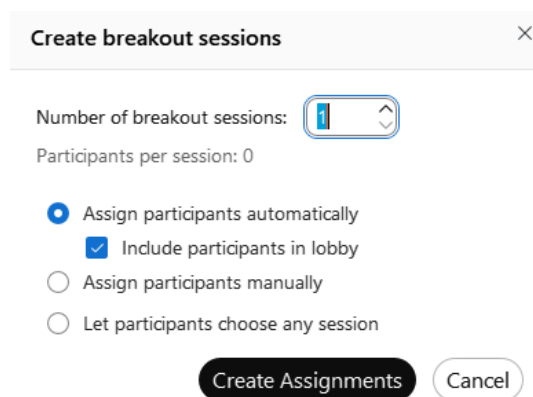
To start a breakout session from the ongoing meeting, click on the **more options**  button.



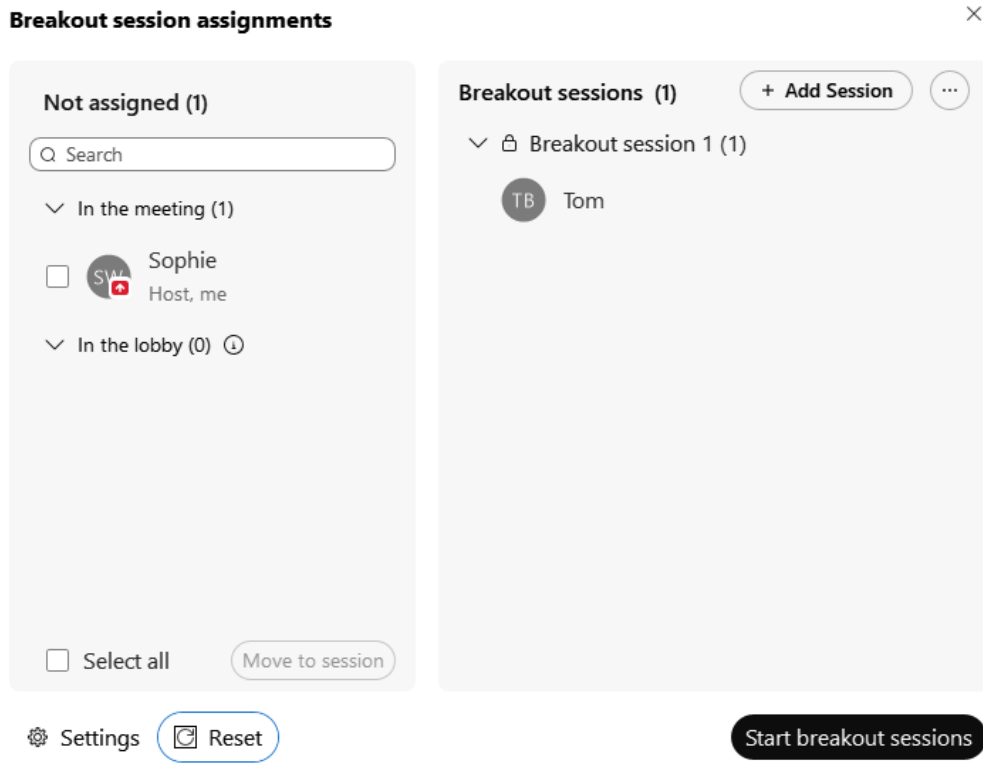
Then select **Enable breakout sessions**.

The user will then be met with the below pop up. From here the user can:

- Choose how many breakout sessions they want.
- Decide whether to assign participants to the breakout session manually, automatically or let the participants choose.
- Then click **Create Assignments**.

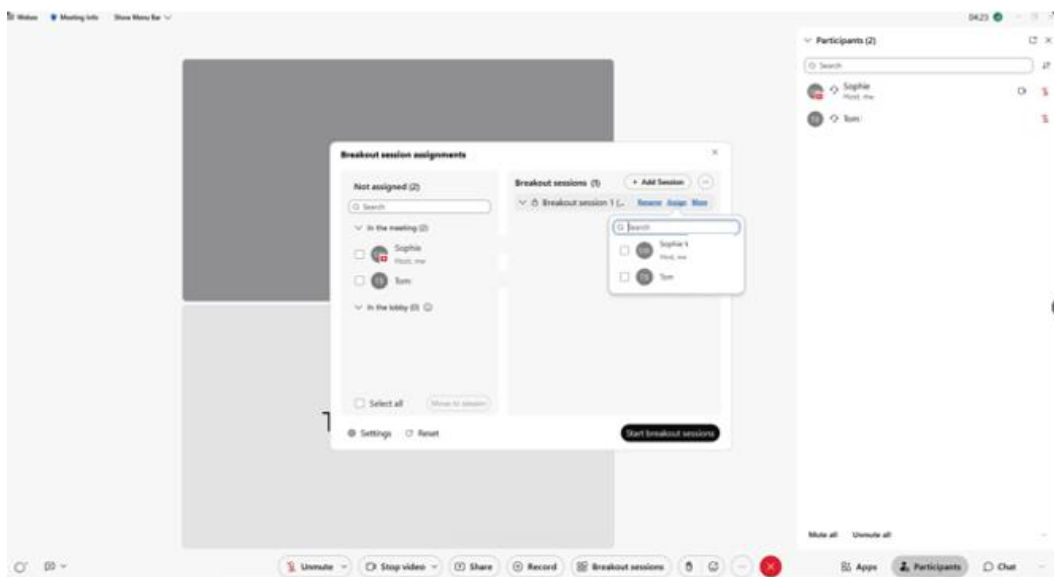


The below screenshot shows the participants assigned to the breakout session automatically. To start the breakout session, click **Start breakout sessions**.

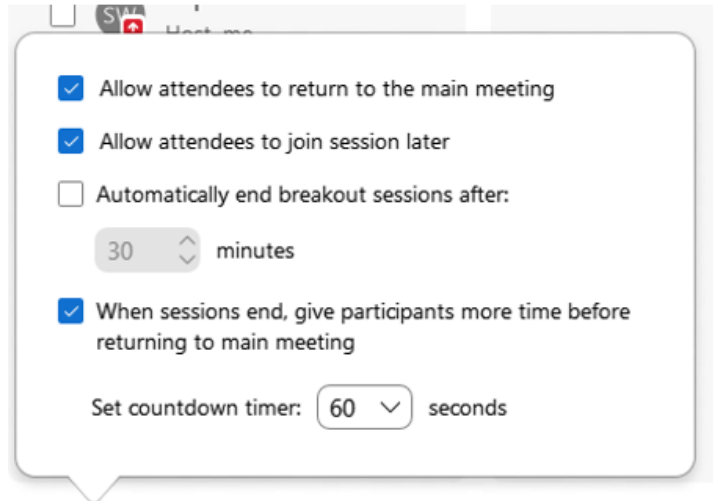


To manually assign participants to the breakout session, it can be done 1 of 2 ways:

- Select the names on the left-hand side of the participants required to be moved into the breakout session and click **Move to session**.
- On the right-hand side under **Breakout sessions**, click **Assign** and then select the participants.
- Once the user has manually selected the participants for each breakout session, click **Start breakout sessions**.



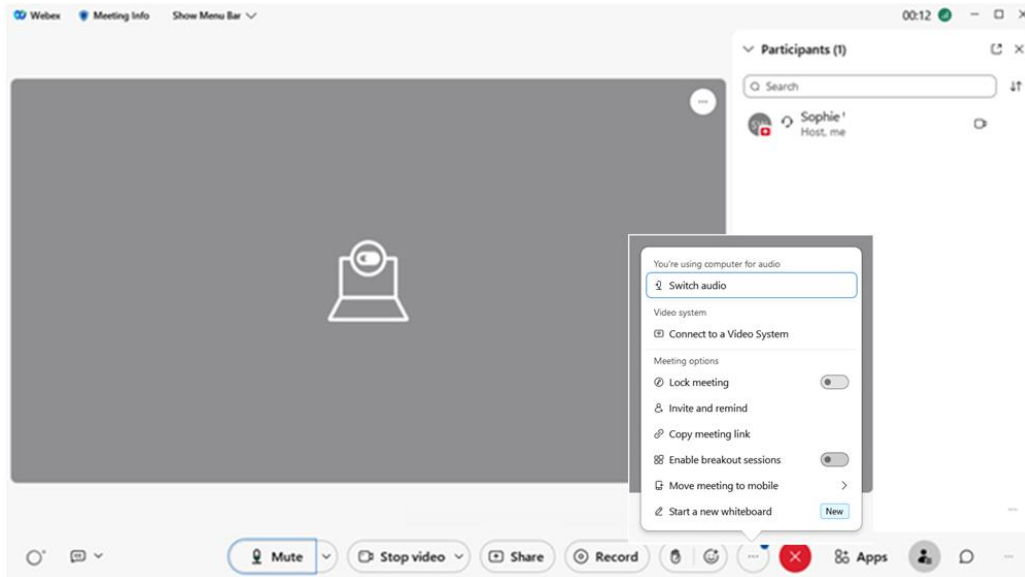
When ending a breakout session, the countdown timer is automatically set to 60 seconds. This can be amended in **Settings**.



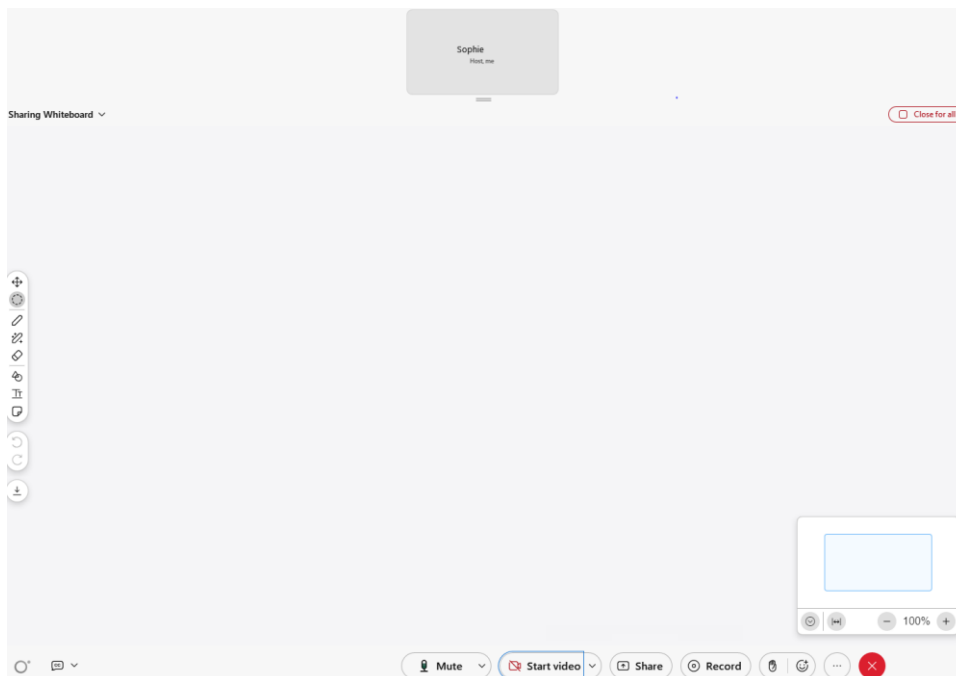
[Click here for further information on breakout sessions](#)

6.4.5 Whiteboards within Meetings

Whilst in a meeting, anyone can start a whiteboard and begin collaborating. There can only be one open whiteboard at a time. To open a whiteboard from the ongoing meeting, click on the **more options** button and select **Start a new whiteboard**.



The whiteboard will then be displayed:



On the left-hand side, the tool bar includes:

- **Selector tool:** allows the user to move multiple items at once.
- **Drag/Move:** allows the user to move items around the whiteboard
- **Pen tool:** hold and drag to draw a line
- **Magic pen:** make lines or shapes automatically smoother and straighter

- **Eraser:** erase any annotations on the whiteboard
- **Stickers:** add a sticky note, change the colour of it and annotate
- **Text:** add text onto the whiteboard
- **Shapes:** choose either circle, square or diamond


All whiteboards are auto saved and appear in the Webex Whiteboard site. There is also the functionality to save the whiteboard as a PDF document, however this then cannot be edited.

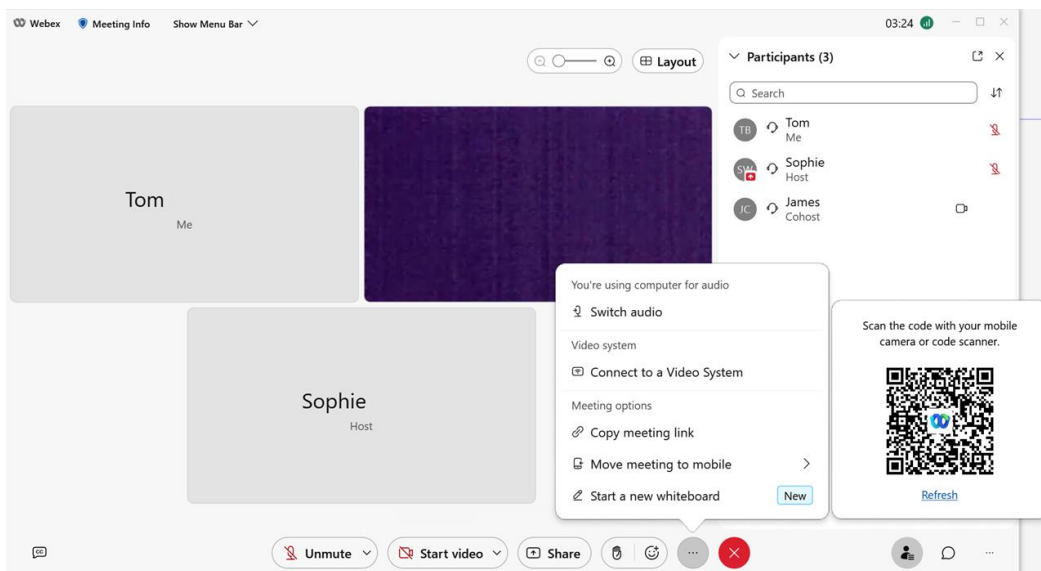
[Click here for further information on whiteboards](#)

6.4.6 Move Meeting to Mobile Phone

The user can move a Webex meeting from the desktop app to the Webex Meetings app on their phone without disrupting or disconnecting the meeting.

Note: it's best to have the Webex Meetings mobile app installed on the mobile device first before moving a meeting.

- Join the meeting on the desktop app
- Select the **more options** button  and click **Move meeting to mobile**
- Scan the QR code with device's camera



[Click here for further information on moving meetings from desktop to mobile](#)

6.4.7 Single Meeting Experience Q&A

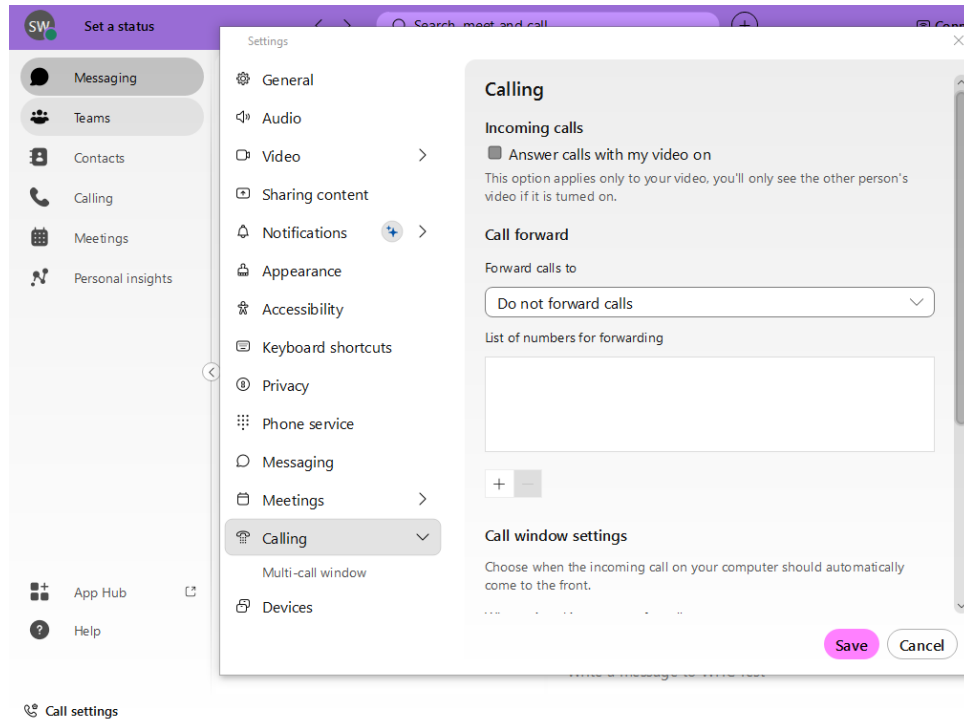
<p>Q: Do Basic user meetings allow guests & dial in now?</p>	<p>A1: Yes, Basic user meetings allow guests, even in Spaces. Guests can be added to an invite and will be able to join the meeting but will not be added to the Space.</p> <p>A2: No, Basic meetings are VoIP only and do not offer a dial in option.</p>
<p>Q: Will Webex Basic users have true PMR now?</p>	<p>A: Yes, they will have a personal meeting room where they can host meetings outside of Spaces.</p>
<p>Q: What are the participant limits?</p>	<p>A: Participant limits for Space meetings are the same as those for regular meetings based on a user's package. Basic 100, Standard 100, Premium 1000.</p>
<p>Q: Is screensharing still supported for Basic users?</p>	<p>A: Yes, they will retain all the functionality currently available, we have just highlighted the new capabilities in this presentation.</p>
<p>Q: Will we still be able to start a Space meeting ad-hoc, by pressing the meet button?</p>	<p>A: Yes, both internal and external participants can start ad-hoc meetings.</p>
<p>Q: Can a Standard or Premium user schedule a meeting and assign a Basic user as a co-host?</p>	<p>A: Not while scheduling the meeting. To assign a co-host at scheduling they must be on the same site. Once the host has started the meeting, they can then set a Basic user as a co-host.</p>
<p>Q: Will there be any changes to Space Sponsors? Right now, it randomly selects Space sponsors.</p>	<p>A: No, currently the Space sponsor is the person who created the Space, and Space meetings get their feature functionality and capabilities from that Space sponsor. If the sponsor leaves the Space, it will randomly select another sponsor. The Space sponsor assignment will not change but what is changing is that the Space meetings will no longer get the feature functionality entitlements from the Space sponsor, they will get them from the meeting host (person who starts or schedules the meeting). The Space sponsor will no longer affect the Space meeting experience.</p>
<p>Q: Is the 40-minute time notification customisable?</p>	<p>A: No, Cisco have ensured that the language used is applicable across all customer bases that this affects.</p>
<p>Q: If it is not customisable, can we include working that mentions the package type upgrade can fix the problem?</p>	<p>A: The warning message to meeting hosts scheduling meetings longer than 40 minutes does include a prompt to contact their administrator if they need longer meetings.</p>

Key Resources


- [Cisco Article | Improved meetings associated with a space](#)
- [WHC Standard/Premium \(Cisco Standard/Premium\) Full-Featured meetings](#)
- [WHC Basic \(Cisco Basic\) Meetings Features](#)

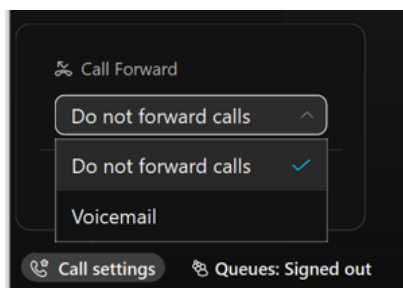
6.5 Call Settings

Call settings are located at the bottom left-hand side of the Webex application, where users can manage and change specific call settings. Here they can set preferences for how calls are received and change call forwarding and voicemail settings.



6.5.1 Call Forward

- Selecting the "Call Settings" button directly will open the pop-up window below, enabling users to quickly begin forwarding incoming calls to voicemail or keep receiving calls as normal by selecting "Do not forward calls".
- By selecting the "Open call preferences" option instead, the main "Calling" settings window will open.
- Here users can add/remove numbers  to forward calls onto. Any numbers added here will be available to select within the quick "Call Forward" drop down shown below.
- For more information please visit: [Webex App | Forward your phone calls](#)



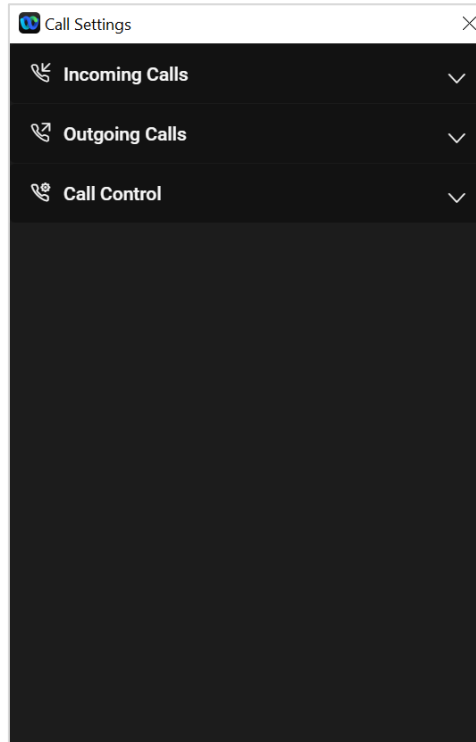
6.5.2 Call Preferences

By selecting "Open call preferences" users can:

- Choose to answer incoming calls using video by default by ticking/unticking “Answer calls with my video on”
- Manage their Call Forward settings as per the above
- Select “Call window settings” to choose when incoming call pop-up windows should show at the front of user’s desktop or Webex-compatible device (i.e. desk phone or video device)

Advanced Call Settings


- Users can also manage more advance call settings as below using the “Advanced call settings” link at the bottom of the main Call Settings window to toggle specific settings on/off including Do not Disturb, Anonymous Call Rejection, and Sequential/Simultaneous Ring, etc.
- Full details on all options including how to enable each can be found using the following link: [Webex App | Manage your advanced call settings](#)



6.6 Using Webex Calling Widget with Microsoft Teams

If the user is a Microsoft Teams user, the great news is that Webex can be added to Microsoft Teams enabling the user to make and receive audio and video calls using the WHC with Webex service.

To do this, the users' Microsoft Teams administrator will need to have allowed Webex Calling within MS Teams.

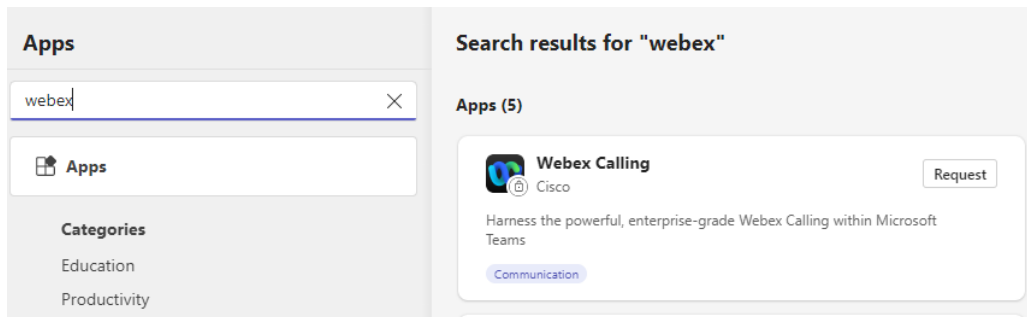
This can be checked by clicking on the **Apps** icon or the search dots  with Microsoft Teams and search for Webex Calling. If it doesn't appear the Administrator needs to add it.

If Webex Calling is available, then this can be added to MS Teams.

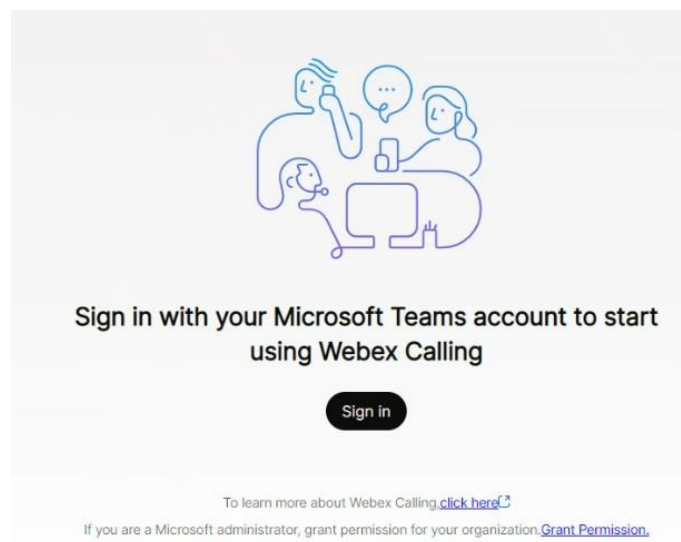
However, the user must be a Webex user to use the Webex Calling App.

To add Webex to Microsoft Teams:

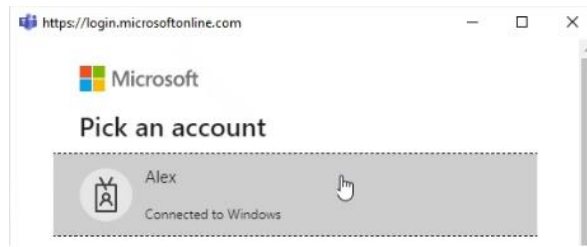
- Click on the **Apps** icon
- Search for Webex



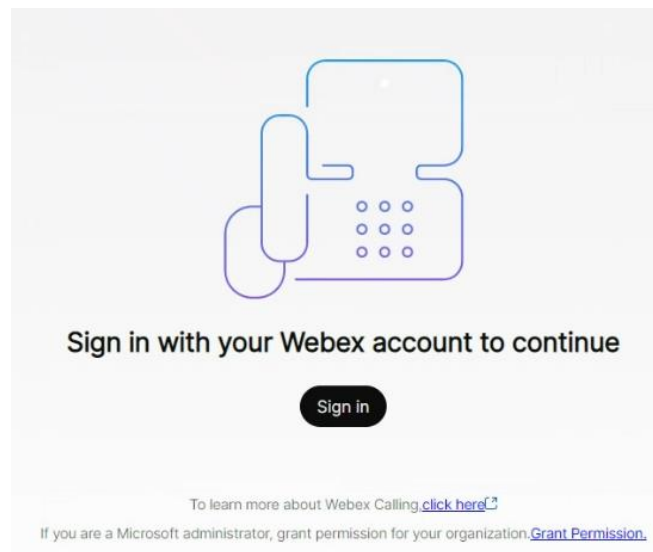
- The following Webex Calling pop up will appear. When ready click the **Sign In** button.



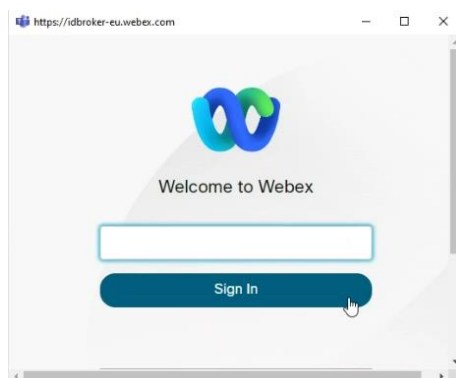
- The user will be required to enter their Microsoft Teams/365 username and password credentials to connect Microsoft Teams with the Webex Calling widget.



- Once entered please click **Sign in**.



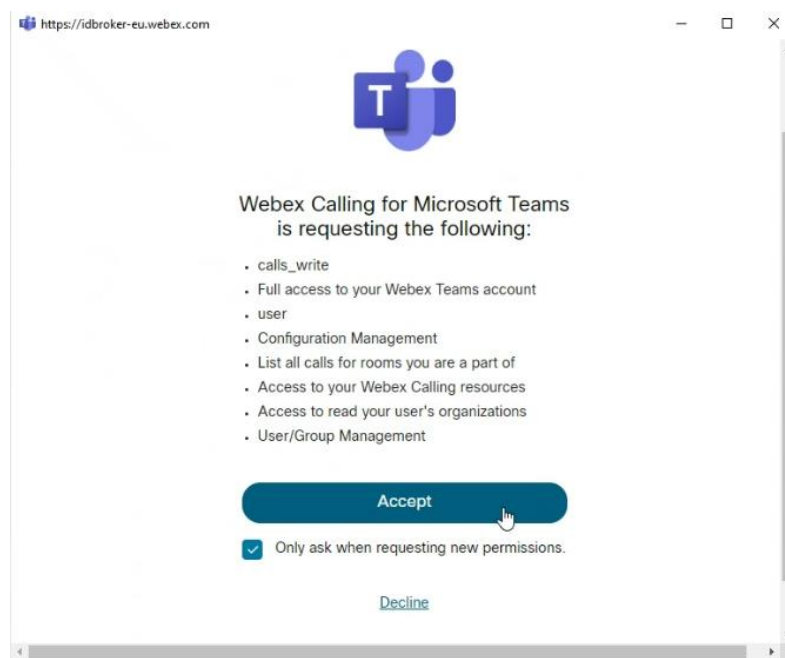
- The user should enter their email address and click **Sign In**.



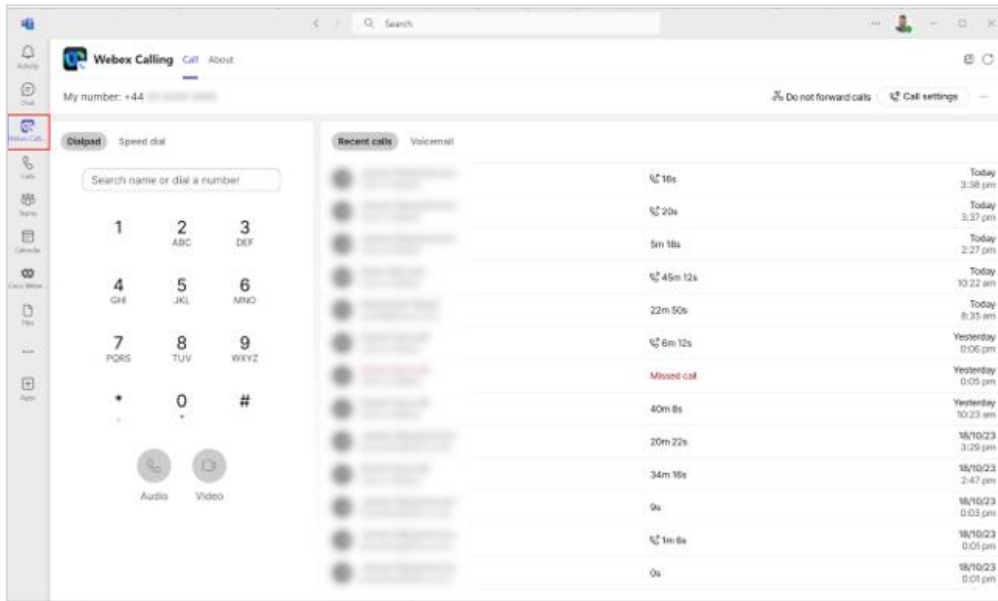
- Enter their password and click **Submit**.



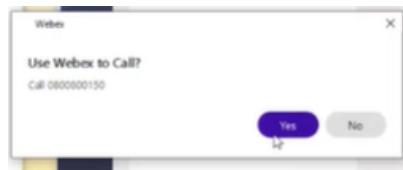
- The user will need to review the following permissions required to proceed and if happy to proceed click **Accept**.



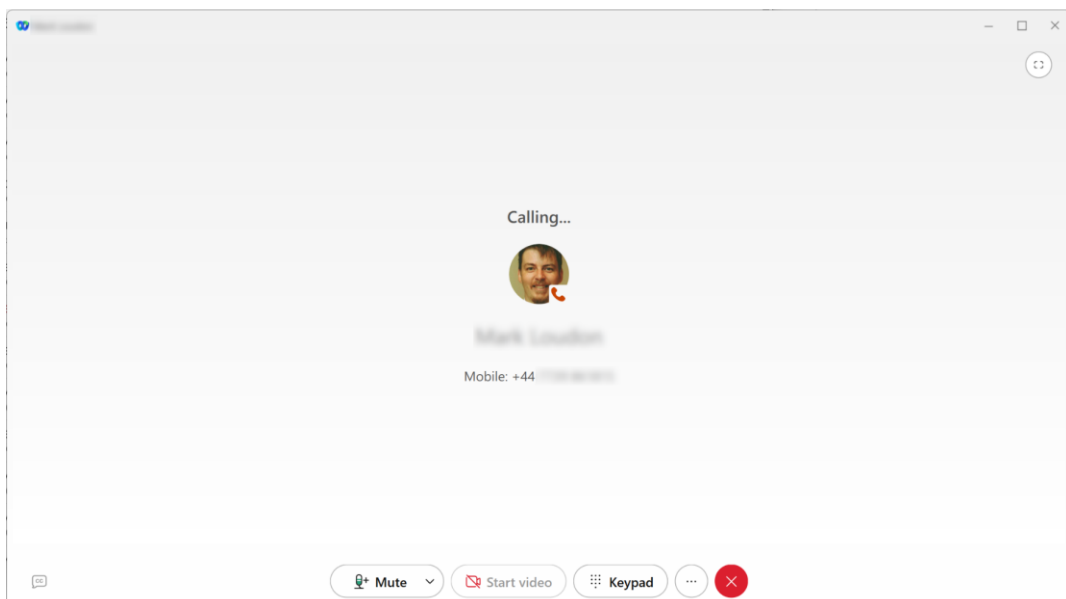
- The user should now be connected and the Webex Calling app will be installed on Microsoft Teams. The Webex Calling widget will also appear on the application bar once this is pinned.



- The user should then be able to make and receive calls using the dial pad or speed dial of their contacts, within the Microsoft Teams application. Once entered, the user can choose whether to call via audio or video.
- A pop up may be displayed asking the user to confirm whether to call via Webex. Click **Yes** to proceed.



- The call will then proceed with full in call controls.



7 Important information

7.1 Logging In/Out

When using the Webex Desktop App clicking **“Exit Webex”** will close the application but the user's login details are remembered for when they re-start the app.

If the **“Sign Out”** function is selected, it will completely sign the user out of Webex and they will have to log in again using their application credentials.

On a mobile device, closing the Webex app window (e.g. swipe right/up) will perform the same function as **“Exit Webex”** on the desktop version and the user will not need to log back in. However, as per the desktop version, if the user selects **“Sign Out”** in the app, their log in credentials will be required to sign back in.

Please ensure users keep a record of their Application Username and Password, as there will be instances where this will be required.

Application password can be reset on the Business Portal.

Business Portal passwords for users, can be reset by their company administrator on the portal.

7.2 What's New

Updates or releases included in the What's New pop up within the app (generated after the user opens their app following each monthly app update) are general Webex application updates across the Cisco Webex application. These do not necessarily reflect updates which BT, as a service provider, have made to the WHC Webex application – for the most accurate updates/releases within the BT version of Webex app please refer to the WHC Release Briefings available on the Onecom Partners SharePoint site.

8 Known Issues

8.1 Registration Email

It is required for each user to provide a unique email address which is not registered with any other Webex account to proceed with the WHC Webex set-up process. They will need to cease any accounts registered with their chosen email and re-register with WHC Webex for that email to be accepted as part of the set up.

8.2 Conference Calling

Conference calling will only allow 3 parties in the conference call, the 4th party automatically gets placed on hold when calls are merged.

