Webex Teams
Access and Installation Guide

This guide provides an introduction to Cisco Webex Teams. It describes how to access and install the tool, and provides a description of its basic functions.

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What is Webex Teams
Webex Teams is chat and team collaboration software published by Cisco. It can be used to set up chatrooms, share files, run online meetings, and other functions.

Who should use this guide
Use this guide if you:

1. Have a TriMet network account
2. Need to do one or more of the following for your work at TriMet:
   - Attend or run online teleconference meetings
   - Share files, text, or collaborate in real time
3. Have one of the following for connecting to Webex Teams:
   - A TriMet-issued laptop
   - A TriMet mobile phone
   - A personal computer (laptop or desktop)
   - A personal mobile phone

**NOTE:** You do not need additional remote access permissions to access Webex Teams

System and user requirements
You must have a TriMet network account and a computer that runs Windows 7 or later or Mac OS X 10.13 or later.

For more about system requirements, see [System Requirements for Cisco Webex Teams](https://www.cisco.com) on the Cisco website.

How to access Webex Teams
Because you have a TriMet network account, you are authorized to install and use Cisco Webex Teams. You do not need to file an IT service request to gain access.

How to install Webex Teams
How you install Webex Teams depends on whether you are installing on a TriMet device (laptop or desktop computer) or a personal device.

How to install Webex Teams on a TriMet device

1. On the **Start** menu, type **Software Center** then click the **Software Center** icon.
2. In Software Center, make sure you have Webex Teams installed. Installed software does not have a gray square behind its icon.

3. If it does have a gray square behind its icon (as shown above), click the icon and then click the Install button.

How to install Webex Teams on a personal device
1. Open the Cisco Webex Download page.
2. Click the Webex Teams download option suitable for your personal device.

How to log in to Webex Teams
You can log in to Webex Teams two ways:
- Using the Webex Teams app directly on your TriMet-issued laptop or device
- On the web, through the Okta web portal

NOTE: It is strongly recommended that you use the Webex Teams app instead of the web-based version on Okta. That’s due to both better performance and its richer feature set.
How to log in to Webex Teams via Okta

2. Enter your user name and password to log in.
3. Click the WebEx Teams button.
4. Type your email address, and then click Next.

How to log in to Webex Teams on your TriMet-issued device

- If you have already installed Webex Teams, simply log on to your TriMet-issued device and Webex Teams will start automatically

Features of Webex Teams

This image from the Get Started with Webex Teams page on the Cisco website provides an overview of the Webex Teams user interface.
Common tasks in Webex Teams

Webex Teams has many functions. Here are a few of the common thing you can do in Webex Teams:

- Chat with a person or group
- Share files with a person or group
- Schedule a Webex meeting
- Start a Webex meeting immediately
- Run a Webex meeting
- Attend a Webex meeting

NOTE: These procedures describe these features in the Webex Team app. Similar -- but not exact -- steps can be taken in the web-based version of Webex Teams in Okta.

Chat with a person or group

1. Find the person or group to which you want send a message in the list of recent contacts. These are shown as Spaces in the Webex Teams user interface image above.
2. If you do not see the person or group you want, Use the Search box at the top of the list to run a query.

3. Select the person or group to which you want send a message, and then type your message at the bottom of the Messages area.
4. Press the ENTER key to send your message to the person or group.
Share files with a person or group

1. Find the person or group to which you want to send a message in the list of recent contacts. These are shown as **Spaces** in the Webex Teams user interface image above.

2. If you do not see the person or group you want, use the **Search** box at the top of the list to run a query.

3. Select the person or group to which you want to send a message, and then click and drag your file to the bottom of the **Messages** area.

4. Alternatively, you can click the paperclip icon ( ![paperclip](image)) and then browse to find the file you want to attach.

5. Press the ENTER key to send your file to the person or group.

Schedule a Webex meeting

Meetings are an important feature in Webex Teams. Meetings are online teleconference meetings. Unfortunately, there are multiple ways to set up & run meetings. Use this method to schedule a meeting in advance.

1. Find the person or group you want for your meeting in the list of recent contacts. These are shown as **Spaces** in the Webex Teams user interface image above.

2. If you do not see the person or group you want, use the **Search** box at the top of the list to run a query.

3. Select the person or group you want for your meeting, and then click the ellipsis at the top right ( ⋱ ) to open the **Activity Menu**.

4. In the **Activity Menu**, click the **Schedule** button.
5. Click the **Schedule a meeting** button.

6. A meeting request will open in Outlook that will contain the person or group as attendees and the Webex space as the location. The meeting request will include a link to your meeting for attendees to user. Do not edit that link.

**NOTE:** Webex has another tool called Webex Meetings that has more meeting functionality than Webex Teams.

**Start a Webex meeting immediately**

Use this method to start a meeting immediately, rather than scheduling it in advance.

1. Find the person or group you want for your meeting in the list of recent contacts. These are shown as **Spaces** in the Webex Teams user interface image above.

2. If you do not see the person or group you want, use the **Search** box at the top of the list to run a query.

3. Click to select the person or group you want for your meeting, and then click the **Call** icon at the top right. The icon will expand to show two **Webex Teams Call** options, **Audio Call** and **Video Call**.

   ![Webex Teams Call](image)

   **IMPORTANT:** Unfortunately, Webex Teams sometimes uses different words within the user interface to refer to the same thing. In this case, Webex Teams refers to this kind of unscheduled meeting as a **Call** (in a 1-to-1 space) and a **Meet** (in a group space).

   ![Meet](image)

   It’s very easy to get mixed up by this. However, a **Call** and a **Meeting** do the same thing and they provide very similar buttons and controls.

4. Click the type of call you want to start. If you start a 1-on-1 call, Webex Teams opens a dialog box immediately. If it is a group meeting, Webex Teams opens a meeting dialog box as shown in step 2 in the next section, **Run a Webex meeting**.

   **NOTE:** A 1-on-1 video call will start your own webcam without additional warning, so be ready for that!

**Run a Webex meeting**

Whether you schedule a meeting in advance or start a meeting immediately (sometimes known as a ‘call’), the connection method and controls you after joining the meeting are very similar.
1. To join a scheduled meeting, in the Spaces area of Webex Teams, find the person or group you sent the meeting to, and then click the Join button. For an immediate meeting (sometimes known as a call), the meeting dialog box opens when you start the call.

2. A meeting dialog box will open. Do not click Join Meeting yet.

Make sure to select your audio and video settings first — before you click Join Meeting. Here is a view of your audio options.

**NOTES:**
- If you select Call me at, be sure to include hyphens in the telephone number. For example, 503-555-5555.
- If you select Call In, Webex will provide the number to call, access code and attendee ID after you click Start Meeting.

For more information, see Choose Your Audio and Video Settings Before You Join a Meeting on the Cisco website.

3. After you set your video and audio options, click Join Meeting.
4. After you join, control the meeting with the following set of buttons, described below from left to right
<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio</td>
<td>Toggle to mute or unmute your microphone.</td>
</tr>
<tr>
<td></td>
<td>If the button is red, it means you are muted.</td>
</tr>
<tr>
<td>Video</td>
<td>Toggle to share or not sure video of yourself.</td>
</tr>
<tr>
<td></td>
<td>If the button is red, it means you are not sharing video.</td>
</tr>
<tr>
<td>Share content</td>
<td>Display your desktop or select individual programs to display</td>
</tr>
<tr>
<td>Attendees</td>
<td>Toggle to display attendees in a list</td>
</tr>
<tr>
<td>Text</td>
<td>Toggle to display text messages in a scrolling list</td>
</tr>
<tr>
<td>Ellipsis</td>
<td>See below</td>
</tr>
<tr>
<td>Close meeting</td>
<td>Click the big X to close the meeting</td>
</tr>
</tbody>
</table>

The **Ellipsis** button contains several functions as shown here. During a call or instant meeting, the ellipsis contains only the **Add guest** and **New Whiteboard** options.

Attend a Webex meeting
See the [Run a Webex meeting](#) section earlier in this guide. Many of the controls and settings are the same, especially the audio and video settings before joining.

**NOTE:** If you use the phone number and access code provided in the Outlook invite for a scheduled Webex meeting, Webex labels you as **Call_in_User_X** rather than by your name.

For more information
- See [Webex Teams](#) on TriNet
- See [Webex Teams App](#) on the Cisco website for more step-by-step help articles

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