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 attend or run online teleconference meetings for your work at TriMet
3. Have a TriMet-issued laptop, TriMet mobile phone or a personal computer (laptop or desktop) from which to connect to Webex Teams when offsite

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 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:

- On the web, through the Okta web portal
- Using the Webex Teams app directly on your TriMet-issued laptop or device

NOTE: It is recommended that you use the Webex Teams app instead of the version on Okta. That’s because there is a richer set of features in the app.
How to log in to Webex Teams via Okta

1. Go to the TriMet Okta portal.
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 an individual or a group
- Attach files in chat
- Start a meeting
- Attend a 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](attachment.png)) 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 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 ( ![ellipsis](ellipsis.png)) 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 use. Do not edit that link.

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

**Start a meeting immediately**

Use this method to start a meeting immediately, rather than scheduling it in advance. In Webex Teams this kind of meeting is not a meeting but a **call**.

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**.
4. Click the type of call you want to start. It will start immediately. A video call will start your own webcam, so be ready for that!

**Run a meeting**

Whether you schedule a meeting in advance or start a meeting immediately (also 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 a call (an instant meeting), the meeting dialog box opens when you start the call.
2. A dialog box will open. Select your Audio and Video settings before clicking Join Meeting.

Example Meeting

1:30 PM - 2:00 PM

3. 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.

4. After you join, control the meeting with the following set of buttons, 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>Video</td>
<td>Toggle to share or block video of yourself</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>

If the Audio and Video buttons are red, those audio or video are muted/blocked.
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.

![Ellipsis button](image)

**Attend a meeting**

See the Run a meeting section earlier in this guide. Many of the controls and settings are the same, especially the audio and video settings before joining.

For more information, see [Choose Your Audio and Video Settings Before You Join a Meeting](https://cisco.com) on the Cisco website.

**For more information**

- See [Webex Teams](https://tri.net) on TriNet
- See [Webex Teams App](https://cisco.com) on the Cisco website for more step-by-step help articles