



TELUS Cloud PBX Collaboration with Cisco Webex:

The Essentials



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 TELUS Cloud PBX Collaboration.

Do you manage projects, people, sales, customers or technical tickets? Do you need to communicate more effectively with colleagues or students? This essential guide will show you how TELUS Cloud PBX Collaboration can easily fit into your workday by streamlining messaging, meetings, whiteboards and file sharing all in one app.

Here's what's included:

- Overview of TELUS Cloud PBX Collaboration
- Who can use TELUS Cloud PBX Collaboration
- How to quickly install and customize the tool
- How to use messaging, searching and meetings
- How to seamlessly use a video device with TELUS Cloud PBX Collaboration
- Useful links and handy tips

TELUS Cloud PBX Collaboration works for all types of teams

The growing team

- People come and go. New hires need a smooth joining experience.
- Securely exchange personal information with the company and easily access information to quickly be productive.
- Meet the team as a group and have one-on-one mentoring sessions.
- Enrich the hiring process, from interviews to contract signing and orientation information.
- Answer questions quickly from your mobile device, at any time of day.
- Make virtual leaders more present and involved while avoiding information overload.

The creative team

- You need to keep the 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 describe ideas and provide feedback.
- Have impromptu or scheduled video calls easily with any internal or external stakeholder to review documents live and see facial reactions.

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 TELUS Cloud PBX Collaboration through the desktop, mobile or web apps to get information quickly, seamlessly and securely.
- No matter where you are, your team can collaborate.

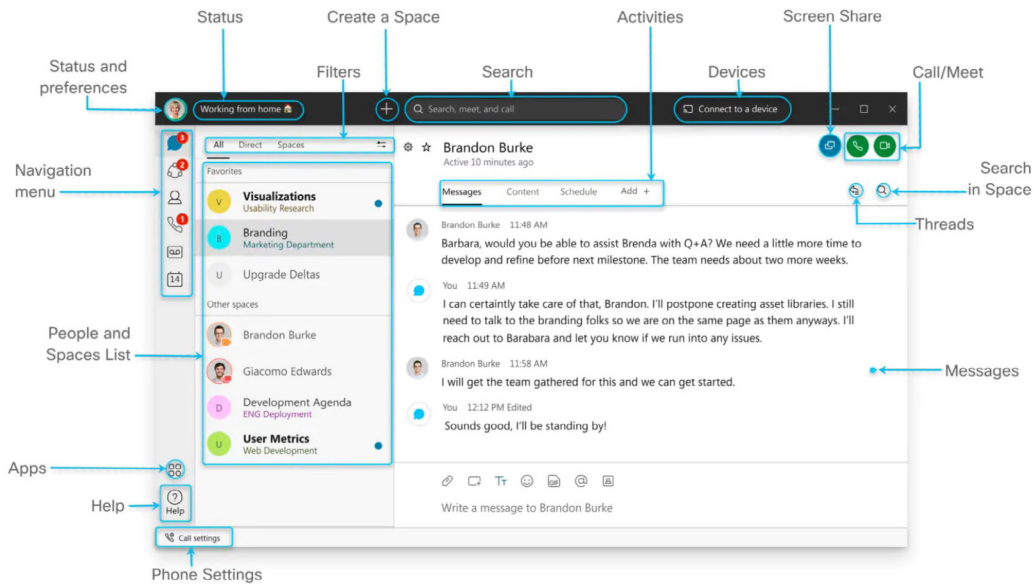
The project team

- Task-oriented and deadline-driven. Great team coordination is necessary as well as regular sync-up 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.

The distributed team

- Your team is spread around the world, 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 all over the company.

Getting started: Get to know TELUS Cloud PBX Collaboration



Customize the app

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

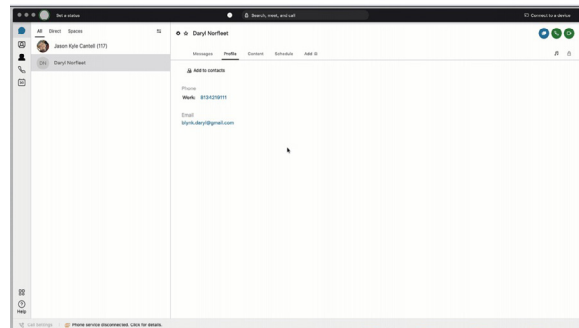
Click on your initials in the window that opens.

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.

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**.

Test your 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**.

Check your camera

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

Step 1

Click **Video**.

Step 2

Select your webcam from the drop-down list.

Step 3

Click **Save**.



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.

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 who have “Smart Notifications” set up will get a ping that their team is meeting. The green meet button will appear next to the space. They only have to click to join in.

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

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.

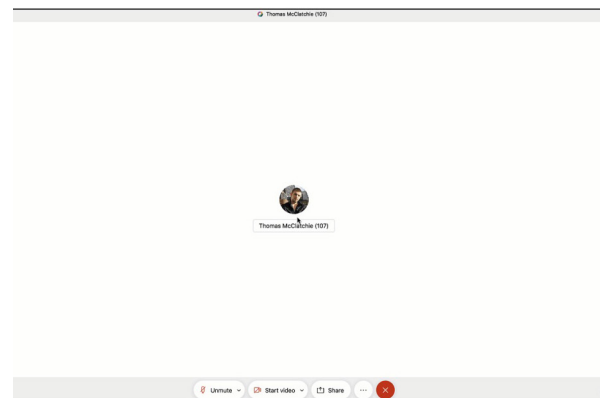
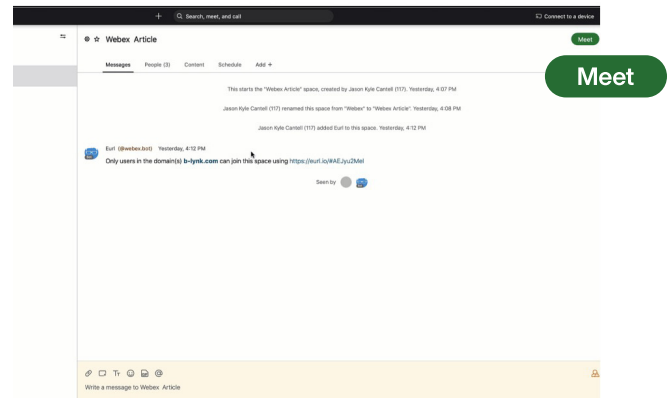


Step 2

Click **Invite guests to meeting**.

Step 3

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



Co-create with whiteboarding and screen sharing

Whiteboards are powerful and simple tools to convey visual ideas and brainstorm on projects. Within TELUS Cloud PBX Collaboration, 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.

Invite someone within a 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.

Share screen

In TELUS Cloud PBX Collaboration 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

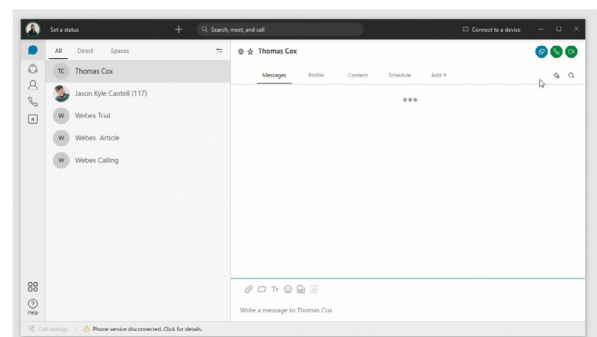
If you are planning to share a video, check **Share computer audio** and **Optimize for video** on top of the screen.

Step 3

Select the screen you want to show.

Step 4

Click **Stop** in the orange bar to stop sharing.



Be a TELUS Cloud PBX Collaboration master: Spaces tips and tricks

Add an external participant to a space

You're 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 favourites 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 favourites list by clicking the star in front of the space name.

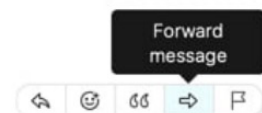


Add integrations to your space

You can see directly in the TELUS Cloud PBX Collaboration 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 [Cisco 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 people status

Knowing if people are available is important when you need to communicate with them. With TELUS Cloud PBX Collaboration, 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. |

For more information visit www.telus.com/business.

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**.