

Contents

Page 1

Installing WebEx and Scheduling Meetings

- How do I install WebEx?
- How do I schedule a meeting?

Page 2

Starting a Meeting and Using Quick Start Options

- How do I start a meeting?
- How do I use the Quick Start options?

Page 3

Managing WebEx Sessions

- How do I use the Participant panel and menu?

Page 4


Managing WebEx Sessions (continued)

- How do I use the Sharing Toolbar?


Installing WebEx and Scheduling Meetings

How do I install WebEx?

Create Password:

1. From the New Account for Enterprise e-mail you receive from the administrator, click . The *Change Password* screen displays.

Note: Your **Username** is provided within the e-mail message.








2. Type a password in the **New Password** and **Confirm Password** fields and then click .

Note: You will receive an e-mail message from WebEx confirming your password has been changed.

Download Productivity Tools


1. From the New Account for Enterprise e-mail you receive from the administrator, click the **Download the Productivity Tools** link. Your browser's file download message appears.

Note: Be sure to close all Office programs, including Outlook, during the installation process.

2. In the *Open File* dialog box, click  to run the *ptools.msi* program. The *WebEx Productivity Tools – InstallShield Wizard* appears.
3. Click . The *License Agreement* appears.
4. Click the radio button to accept the license agreement terms.
5. Click . The *Change Destination* screen appears.
6. Click . A status bar appears showing the installation progress.
7. Click  to complete the installation. The *WebEx Productivity Tools* dialog appears.
8. Type your WebEx Site URL and click .
9. Type your network **Username** and **Password**, then click . The *WebEx Productivity Tools are installed* page appears.
10. Click the **X** in the upper right corner of the screen to close the dialog box.
11. Click the **X** to minimize the *WebEx Productivity Tools* screen

How do I schedule a meeting?

Add WebEx Meeting

1. From Outlook, click the **New Item** drop-down and select the **Appointment** menu option.
2. Click . The *WebEx Settings* dialog box displays.

Select WebEx Settings



1. Review and select the following WebEx setting options as necessary:

Option	Description
Meeting Password	Enter a password if you require participants to enter a password to the join the meeting.
Exclude password from email invitation	Select this option if you want to exclude the meeting password from the email message that is sent to everyone you invite to your meeting.
Attendees can join meeting 5 minutes before starting time	Select this option if you want to allow the meeting attendees to join the meeting prior to you starting the meeting. Note: Click the drop-down if you want to select 10 or 15 minutes.
Display global call-in numbers to attendees	Leave this option selected to provide a link with global call number in email invitations.
Attendees can also join teleconference before starting time	Leave this option selected to allow participants to join audio portion of meeting prior to the host joining.
Display toll-free number	Leave this option selected to provide a link with toll-free call number in email invitations.
Entry and Exit Tone	Select one of the tone options to indicate participant entry into the meeting.



2. Click .

Note: A message appears in the body of the appointment e-mail. As stated do not delete this text, meeting details are added after the invitation is sent.


Invite Attendees

1. Click .
2. Type the meeting attendees in the **To** field and type meeting topic in the **Subject** field.
Note: If you want to designate an alternate host for the meeting, refer to the *Add Alternate Host* section below.
3. Select the meeting **Start** and **End** date and time.
4. Click .
5. Email recipients receive a WebEx invite with links to join the meeting and audio.

Add Alternate Host (as necessary)

1. Click . The *WebEx Settings* screen displays.
2. Click the **Resources** tab.
3. Click the checkmark on the left side of the attendee's name that you are designating as an alternate host in the **Alternate Host** field. Multiple attendees can be selected as alternate hosts.
4. Click .

Changing a Meeting

1. Access the meeting you want to change from your calendar.
2. Make the necessary changes to the attendees, start and end date and time.
3. Click . Email recipients receive an updated WebEx invite with links to join the meeting and audio.

Cancel a Meeting

1. Access the meeting you want to cancel from your calendar.
2. Click  and then click . Email recipients receive a WebEx cancellation e-mail.

WebEx Host Quick Reference

Contents

Page 1

Installing WebEx and Scheduling Meetings

How do I install WebEx?

How do I schedule a meeting?

Page 2

Starting a Meeting and Using Quick Start Options

How do I start a meeting?

How do I use the Quick Start options?

Page 3

Managing WebEx Sessions

How do I use the Participant panel and menu?


Page 4

Managing WebEx Sessions (continued)

How do I use the Sharing Toolbar?

Starting a Meeting and Using Quick Start Options

How do I start a meeting?

1. Access the meeting you want to start from your calendar.
2. Click the **Join WebEx Meeting** link. The WebEx meeting website displays.
3. Click the **If you are the host, start your meeting** link. The *Log in to your account* screen displays with your **Username** and **Password** defaulted.
4. Click  to start the meeting.

How do I use the Quick Start options?

When you start or join a meeting, your meeting window opens with the *Quick Start* area on the left side of the screen.

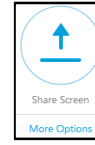


I Will Call In

1. Click the **More Options** link to connect to the audio by selecting one of the following options:

Options
Call Me <ol style="list-style-type: none"> 1. You will receive a call and may be prompted to press 1 to connect. 2. Select Remember phone number on this computer if you want to store this number for future meetings.
I Will Call In <ol style="list-style-type: none"> 1. Dial the phone number listed; enter the meeting access code and your attendee ID #. 2. Close the window.
Call Using Computer <ol style="list-style-type: none"> 1. You are connected to the audio conference using your computer microphone and speaker or headset. 2. Test and adjust your speaker and microphone settings as needed.

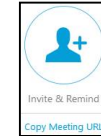
Note: The audio button on the *Quick Start* page indicates how you are connected to the audio



Share Screen

Click the **More Options** link to share files by selecting one of the following options:

Options
Share My Screen Use to share your desktop, allowing access to any application on your computer.
Share File (Including Video) Use to share a file, such as a document, presentation or video that resides on your computer. One or multiple files can be selected to share. Note: The files load one at a time, and a status indicator appears in the content area. The shared file appears in the content viewer for participants to view.
Share Application Use to share a software application or a web browser. At any time during a meeting, you can grant participants privileges that allow them to annotate and access the shared application.



Invite & Remind

1. Click **Invite & Remind** to invite participants to the meeting after it has started, by selecting one of the following options:

Options
Email Use to invite people to the meeting using e-mail. <ol style="list-style-type: none"> 1. Enter one or more email addresses (separated by commas or semicolons) in the <i>Invitees</i> section 2. To send have WebEx send the email message click Send. OR To send the email from your Outlook email, click the Invite with your local email link.
Phone Use to invite people to the meeting by phone call. <ol style="list-style-type: none"> 1. Enter the name of the person you want to invite to the meeting in the Invitee Name field and their phone number in the Phone Number field. 2. Click Call. WebEx calls the invitee using the phone number provided. Note: The invitee will only enter the audio portion of the WebEx session.
Remind Use to send a meeting reminder to participants that have not yet joined. <ol style="list-style-type: none"> 1. All invitees not in the meeting are selected to receive the reminder. Uncheck the box for each person that you do not want to remind. 2. To have WebEx send the reminder, click Send Reminder. OR To send the reminder from Outlook email, click the link Remind with local email link.

WebEx Host Quick Reference

Contents

Page 1

Installing WebEx and Scheduling Meetings

How do I install WebEx?

How do I schedule a meeting?

Page 2

Starting a Meeting and Using Quick Start Options

How do I start a meeting?

How do I use the Quick Start options?

Page 3

Managing WebEx Sessions

How do I use the Participant panel and menu?

Page 4











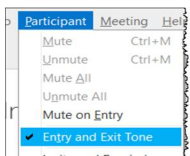
Managing WebEx Sessions (continued)

How do I use the Sharing Toolbar?

Managing WebEx Sessions

How do I use the Participant panel and menu?

The list of participants in the meeting appears on the right-side of the screen. Use the Participant panel and Participant menu to manage the following functionality:

Function	Actions
Video Conferencing	<ul style="list-style-type: none"> Click  (Start My Video) to open the video conferencing feature. When a participant has clicked on the video conference feature the video icon appears in green  on the right side of their name in the Participant panel indicating the user is sending video. To stop video conferencing, click  (Stop My Video) To change your video conference options, click  (Set Video Options) in the upper-right corner of the screen. <ul style="list-style-type: none"> Use the <i>Start my video in all meetings</i> option, to activate/deactivate the automatic starting of the video feature in all meetings. Use the <i>Don't show video reminder when meeting starts</i> option, to activate/deactivate the video reminder message that appears when all meetings start.
Muting/Unmuting	<ul style="list-style-type: none"> Click  (Mute) to mute your microphone. Click  (Unmute) to unmute your microphone. To mute a participant's microphone, select the participant's name and click  (Mute) To unmute a participant's microphone, select the participant's name and click  (Unmute) To mute all participants, right-click your name as the Host and select the Mute All menu option. To unmute all participants, right-click your name as the Host and select the Unmute All menu option.
Hand Raising	<p>If a participant clicks  the hand raise icon, it will appear next to the participant's name. This feature is an effective way for the participant to call attention to themselves, if they have been placed on mute.</p>
Changing Participant Roles	<p>You can drag and drop the  (WebEx) icon to assign the presenter role to another participant.</p> <p>Notes:</p> <ul style="list-style-type: none"> The host is assigned the presenter role when a meeting starts. The host can pass the presenter role to any participant at any point in the meeting There can be only one presenter at time within a meeting
Turn Off Entry and Exit Tones	<p>To turn off entry and exit tones (beeps) during a meeting, click the Participant option in the menu bar at the top of the screen and click Entry and Exit Tone to deselect.</p> 



WebEx Host Quick Reference

Contents

Page 1

Installing WebEx and Scheduling Meetings

How do I install WebEx?

How do I schedule a meeting?

Page 2

Starting a Meeting and Using Quick Start Options

How do I start a meeting?

How do I use the Quick Start options?

Page 3

Managing WebEx Sessions

How do I use the Participant panel and menu?

Page 4

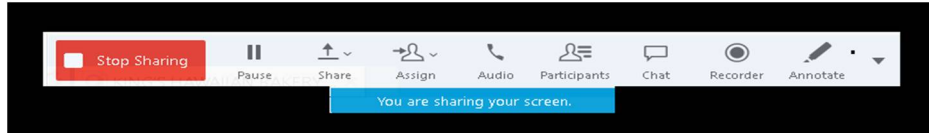
Managing WebEx Sessions (continued)

How do I use the Sharing Toolbar?

Managing WebEx Sessions (continued)

How do I use the Sharing Toolbar?

File sharing is ideal for presenting information that you do not need to edit during the WebEx session, such as a presentation. Participants can view shared files in their content viewers without the need for the application with which it was created. The Sharing Toolbar appears when sharing an application. It may be moved anywhere on the console.



Stop Sharing



Click the **Stop Sharing** to stop sharing your desktop or application window with participants and return to the *Quick Start* screen.

Note: This does not end the WebEx session.

Pause/Resume



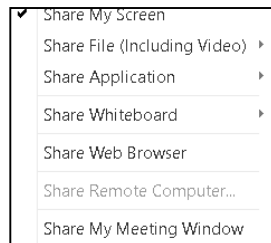
This is a toggle button used to pause and resume sharing.

- Click the **Pause** button to freeze the participant view of the desktop or application window you are sharing.
- Click the **Resume** button to unfreeze the participant view and continue sharing the desktop or application.

Share



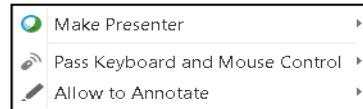
Click the **Share** drop-down to switch between sharing one of the following:



Assign



Click the **Assign** drop-down to allow a participant to do the following:



Audio

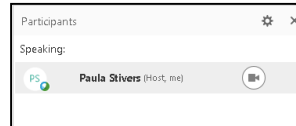


- Click the **Audio** button to bring up the *Audio Connection* dialog box.
- Click the **X** in the upper right corner to close the dialog box.

Participants



Click **Participants** to display the WebEx *Participants* list box.



Click the **X** in the upper right corner to close the *Participants* list box.

Annotate



Click the **Annotate** button to display an annotation toolbar with writing/drawing tools that allows you to annotate on your shared screen.

Note: Any WebEx meeting controls, panels and notifications that are open while you're sharing your screen will block participant's view of the shared screen. To clear the items from the view, press **Ctrl+Alt+Shift+H**. Press **ESC** to exit clear view mode.

Chat



Use this to display the chat message box.

- Type messages for participants in the textbox.
- Click in the **Send to** field and select **Everyone** to send to all participants or select the specific participant from the list.
- Click **Send**.
- Click the **X** in the upper right corner to close the *Chat* message box.

Recorder



To record a meeting:

- Click **Recorder** to display the recorder control box and record a session.



- Click to start the recording
- Click to pause/resume recording
- Click to stop the recording.

To access a recorded meeting:

- From the WebEx website click the **Meeting Center** tab
- Click the **My Recorded Meetings** menu option. The list of your recorded meetings display.
- Click to play the recording
- Click to send the recording as an email link
- Click to download, modify, disable or delete the recording.