Cisco WebEx: Introductory Guide for Hosts
# Table of Contents:

Overview .................................................................................................................. 1
Objectives .................................................................................................................. 1
What is Cisco WebEx? ............................................................................................... 2
What is needed in Terms of Hardware and Devices? ............................................. 2
Accessing the ETSU WebEx Site ............................................................................. 4
Finding Your Way in the WebEx Site ...................................................................... 5
The Difference between Meetings and Trainings .................................................. 6
Scheduling a WebEx Meeting .................................................................................. 7
Scheduling a WebEx Training .................................................................................. 9
Getting Your Computer Ready for a WebEx Session (Windows & Mac) ......... 15
Additional Training & Support .............................................................................. 17
Overview

Cisco WebEx is web-based conferencing software used to share information and host meetings over the internet. It can be used to communicate via text chat, audio and/or video. You can share visual media like presentations, documents, and videos. You can also provide interaction through other available features like polling, breakout groups, and Q&A. If you need to keep an archive of the meeting then you can record it for review at a later time.

Objectives

- Log into ETSU’s WebEx site and manage account settings and meetings
- Schedule a meeting, configure its settings, and invite others to join
- Download the necessary components to host a meeting
- Use the tools and features of WebEx to communicate, share multimedia, and interact with participants
- Make an archived recording of a meeting and share it with others
What is Cisco WebEx?

Cisco WebEx is a Java-based web conferencing application used by ETSU in order to conduct synchronous online meetings and presentations. WebEx allows you to meet with others online and communicate through audio and video. You can also share your desktop screen, digital documents, slide presentations, audio, video, and more, all without requiring any expensive hardware or software. You can also record meetings in order to share or review them later.

What is needed in Terms of Hardware and Devices?

Cisco WebEx is a hosted online service which has been purchased by ETSU. No software purchase is required for individuals in order to use the service, but you will need an account to host WebEx meetings. The Office of eLearning manages the ETSU WebEx site, and can create an account for you upon request.

Though you do not need to purchase any software, you may need to procure one or more of the following devices to communicate effectively:

1. A computer with a high-speed connection to the internet.
2. A microphone built-in or connected to your computer OR access to a telephone line
3. A web-cam (Optional: only for those wishing to be seen during the meeting.)

Once you have these items, you will want to make sure that they work prior to attending a Cisco WebEx meeting. This will be your responsibility to figure out—there is such a wide variety of devices that it is difficult to provide a step-by-step guide for every scenario. Generally, you should start by making sure that everything is properly connected, then test out your microphone and camera using either the software that came with them or your operating system’s device settings.
You Should Probably Use Headphones

Using headphones can be very important, because allowing your speakers to transmit sound into your microphone can cause a variety of frustrations for everyone involved in your meeting. When someone speaks into their microphone while using WebEx, their voice gets transmitted to everyone else and is output either to speakers or headphones (depending on what each person is using). If you are using speakers, then another person’s voice may come out of your speakers and then right back into your microphone. This can cause echoes, or, at the very worst, a horrible, high-pitched screeching noise (feedback). To avoid this problem, everyone should use headphones, which will safely deliver sound to each person’s ears without creating all of the unnecessary noise for the other meeting participants.

Exceptions and Workarounds

A/V Classrooms

Some rooms are equipped with special hardware that can handle using speakers and microphones simultaneously. At ETSU, there are several multimedia classrooms which have microphones, cameras, and speakers built into the ceiling. These rooms are equipped with microphones that should ignore most sound coming from the speakers as long as the sound isn’t too loud.

No Headphones Available

If your microphone and speakers are movable then you can try to position your microphone away from your speakers. For example, you could place the microphone close to you and position the speakers further away and point them away from the microphone. The microphone will likely still pickup sound as it bounces off the wall(s), but you may get better overall results.
Accessing the ETSU WebEx Site

Logging into Your Account

Before you can begin this step, you will need to have an ETSU WebEx account created for you. If you do not have an account then contact Academic Technology (ats@etsu.edu | 439-8611).

Your Cisco WebEx Account

Your WebEx account is not directly linked to other ETSU usernames and passwords you may have. It is managed by the Office of eLearning. If you have trouble accessing your account then contact ATS.

1. Navigate to the ETSU WebEx Login URL (http://etsu.webex.com/) and click on the Host Log In button

2. Enter your WebEx username and password and click Log In

Enter the username and password provided to you by Academic Technology. The username ought to match your ETSU username. If this is your first time logging in then you should be asked to change the default password to something unique to protect your account. Once logged in you will be able to set up meetings and manage your account.

Changing Your Account Password

When you log in for the first time you will be prompted to create a unique password for your account. You can reset this password if you forget it by clicking the Forgot your password? link on the login page.

If you ever experience trouble logging into the WebEx system then please contact ATS (ats@etsu.edu | 439-8611) for assistance.
Finding Your Way in the WebEx Site

Just Add “Center”

Once you’ve logged into the WebEx site and have had a look around then you will immediately notice that Cisco is fond of the word “center”. There are a bunch of centers here. “But what does it mean?” you may ask. Each center relates to a different product within WebEx—a different kind of web conference which can be created. There are no hard and fast rules with regard to the kinds of conference you have to create, but as a standard practice we recommend using the Meeting Center for creating regular everyday meetings, and the Training Center for creating class meetings and training sessions. There are other available products—Event Center and Support Center—but most users will not have need for these except for special circumstances, and so access to these have been disabled by default.

Inside a Center

Once you have navigated to a center, you will see a table of upcoming web conferences that you or others have scheduled. While this product is in its early stages of use at ETSU you may find that in most circumstances the number of sessions listed here is low. However, if you are looking for a session that you or others have created then this is one place where you can look.

Along the left you will see several links arranged vertically in a column and separated into categories. In the image above, I have collapsed these categories so that you can see the basic groups: Attend a Meeting, Host a Meeting, Set Up, and Support. These categories are somewhat self-explanatory even though they are presented in a visually unintuitive way. If this is your first time visiting a center on a the computer you are using then you may want to explore the Set Up section first, as it will help you install the necessary plugins and components which are necessary to participate in web conferences. Each center has its own requirements, so you may find different setup processes in the meeting and training centers.
What is *My WebEx*?

_My WebEx_ is an area of the WebEx site which contains settings and information specifically relating to your personal account and WebEx usage. Your account profile information can be found and edited here (password, basic contact information, etc.), and you can also find other helpful items such as your personal WebEx conference number and meeting usage reports.

You can also find your “personal meeting room” from this area of the site. This is a page of the ETSU WebEx site which is set apart for you to share your meeting information and files with others. If you are interested in learning more about _My WebEx_ then you can read more in chapter 20 of Cisco’s _Meeting Center User Guide_. (URL: https://www.intercall.com/files/Meeting_Center_User_Guide.pdf#page=245)

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### The Difference between Meetings and Trainings

*Meeting Center* and *Training Center* are different products in the WebEx family, and they contain different features. The bulk of the differences will go unseen by most users, because they relate to how each type of session can be delivered. However, there are some in-session feature differences which may affect which product you want to use. Here is a non-comprehensive breakdown of what you’ll find within each session type:

<table>
<thead>
<tr>
<th></th>
<th>Voice</th>
<th>Video</th>
<th>File sharing</th>
<th>Screen sharing</th>
<th>Polling</th>
<th>Recording</th>
<th>Breakout rooms</th>
<th>Q&amp;A</th>
<th>Attentiveness monitor</th>
<th>Quick feedback</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Meeting</strong></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Training</strong></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>

The extra features available inside a training aren’t necessities for most people who need to create a web conference, but they can be helpful in a learning environment. This is why we recommend trainings for courses, but either product can be used.
Scheduling a WebEx Meeting

In WebEx terms, meetings are good for everyday get-togethers, and trainings have features which are better for courses. If you are setting up a place for your online course to meet, or you are going to be doing a training, then you may want to jump to the next section on Scheduling a WebEx Training (p. 9).

1. Login to ETSU's WebEx Site

To schedule a WebEx meeting, first log in to your WebEx host account (URL: http://etsu.webex.com/)

2. Go to the Meeting Center and Find the Scheduler

Click on the Meeting Center link at the top left of the account dashboard welcome screen (1), and then click on the Schedule a Meeting link from the meeting center (2). (See image to the right).

3a. Set Your Meeting Options

Once you begin the scheduling process you will be presented with a menu that contains several options. However, the default “Quick Scheduler” only asks for very basic information:

<table>
<thead>
<tr>
<th><strong>Meeting Topic:</strong></th>
<th>You are required to give your meeting a name, but there is no requirement regarding what the name must be.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Password:</strong></td>
<td>Your meeting password must contain at least 4 characters, but there are no other requirements.</td>
</tr>
<tr>
<td><strong>Date/Time/Duration:</strong></td>
<td>By default, the closest quarter-hour is selected. If you don’t change this then your only option will be to start the meeting immediately. However, you can designate a future time instead, and schedule the meeting for later. As the host, you can enter your meeting before or after its official starting time.</td>
</tr>
<tr>
<td><strong>Attendees:</strong></td>
<td>Provide an email address for each person you want to invite. WebEx will send an invitation email to each person when the meeting is started or scheduled. Be sure to place a comma or semicolon between each recipient’s email address.</td>
</tr>
<tr>
<td><strong>Audio Conference:</strong></td>
<td>By default, WebEx uses WebEx Audio, which integrates both IP (internet) and phone conference audio into the meeting. This means users can call in using their internet-connected device or a telephone. If you want to change or remove these audio options you can do so here.</td>
</tr>
</tbody>
</table>
3b. Advanced Options

There are several more ways that you can customize the features and function of your meeting. For example, you can set up a recurring schedule, require registration, preload an agenda and/or documents, customize attendee privileges, and more. However, you will not find any of these options inside the default “Quick Scheduler”. If you want to see these extra settings then you will need to switch to the “Advanced Scheduler”, which you can do by clicking on the Advanced Scheduler link at the top of the scheduler window. (See image below.)

Once you are inside the advanced scheduler window you will see that the settings have been broken into categories along the right side. You can switch between category settings by clicking on each category’s respective name. (See image below.)

4. Start or Schedule Your Meeting

Depending on the time of your meeting, you will either be presented with the option to Start Now or Schedule Meeting. When all the necessary options are set, go ahead and click on the blue button to start or schedule your meeting. If you are starting your meeting and need help using the meeting space then skip down to page _______
Scheduling a WebEx Training

Note: Trainings are recommended for courses, workshops, seminars, etc., because they include features which might be helpful in a learning environment.

1. Login to ETSU’s WebEx Site

To schedule a WebEx meeting, first log in to your WebEx host account (URL: http://etsu.webex.com/)

2. Go to the Training Center and Find the Scheduler

Click on the Training Center link from the top navbar (1), and then click on the Schedule a Meeting link in the left column (2). (See image on right).

3. Set Your Training Options

Once you begin the scheduling process you will be presented with a menu that contains a daunting number of options. Unlike the meeting center’s “quick scheduler”, the training scheduler will present you with all of the options for trainings. You do not have to be concerned with every setting. You can just give your training a name and a password and move on. However, the options are described here to satisfy inquiring minds.

<table>
<thead>
<tr>
<th>Session and Access Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Meeting Topic:</strong> You are required to give your meeting a name, but there is no requirement regarding what the name must be.</td>
</tr>
<tr>
<td><strong>Password:</strong> Your meeting password must contain at least 4 characters, but there are no other requirements.</td>
</tr>
<tr>
<td><strong>Listing Options:</strong></td>
</tr>
<tr>
<td>· <strong>Listed for all</strong></td>
</tr>
<tr>
<td>All users will be able to see this training on the ETSU WebEx site calendar. However, none can enter without the password.</td>
</tr>
<tr>
<td>· <strong>Listed for authorized users only</strong></td>
</tr>
<tr>
<td>Invited attendees will see this training on the WebEx calendar, but no one else.</td>
</tr>
<tr>
<td>· <strong>Unlisted</strong></td>
</tr>
<tr>
<td>No one will see this training on the ETSU WebEx calendar.</td>
</tr>
<tr>
<td><strong>Additional Session Options</strong></td>
</tr>
<tr>
<td>· <strong>This session will have over 500 attendees</strong></td>
</tr>
<tr>
<td>Trainings can support 1,000 attendees, but if you have more than 500 then sharing limitations will be imposed to save bandwidth.</td>
</tr>
<tr>
<td>· <strong>Automatically delete session after it ends</strong></td>
</tr>
<tr>
<td>When you close the session it will be obliterated.</td>
</tr>
<tr>
<td>· <strong>Send a copy of the attendee invitation to me</strong></td>
</tr>
<tr>
<td>You will receive an email with the training session information.</td>
</tr>
</tbody>
</table>
**Start Your Session Quickly**

If you don’t want to bother with the plethora of other options then you can start your session right from the top of the options menu by clicking on the *Start Session* button. (See image below.)

![Start Session Button](image)

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### Audio Conference Settings

**Select conference type:**

By default, WebEx uses *WebEx Audio*, which integrates both IP (internet) and phone conference audio into the meeting. This means users can call in using a microphone-enabled internet connected device or a telephone. You can change this option to use a third party conference call service, VoIP only, or no audio.

**Additional calling options:**

- **Display toll-free number**
  By default, a toll-free number will be displayed to all meeting participants so that they can call in using a telephone.

- **Display global call-in numbers**
  International callers will be given separate call-in numbers by default

- **Mute attendees upon entry**
  In WebEx, users are able to speak upon entry into the audio conference. If you would prefer that participants not speak unless permitted, then you can mute attendees upon entry.

**Entry and exit tone:**

By default you will hear a beep tone when users enter and exit the audio conference. You can change this to a name announcement or turn it off.

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### Date and Time

**Time:**

By default, the closest quarter-hour of the current day is selected in the EST or EDT time zone (GMT -04:00).

Attendees are allowed to join as early as five minutes before the scheduled start time by default, but you can allow them to enter as early as 30 minutes beforehand. Alternatively, you can disallow anyone to enter the meeting before the start time.

**Occurrence:**

If this training will occur multiple times or over multiple sessions then you can schedule a recurrence pattern. By default trainings are set to be single-session, but you can change them so that you can use the same meeting space for multiple sessions without having to create separate WebEx trainings.

**Duration:**

Your session will not be forced to end if it exceeds the estimated duration.
# Registration (Optional)

## Require registration:

By default, anyone with the correct URL or meeting number and the correct password is able to join a WebEx meeting or training. However, you can instead require attendee registration, limiting access to a specific number of pre-registered users. **To require registration, simply click in the “Require attendee registration” check box.**

When you require registration, users are sent an invitation with a link to a form which they have to fill out prior to attending the meeting. Upon filling out the form, they are emailed another unique URL which allows them to enter the meeting as a registered user.

By default, the registration form requires that users provide their name and email address, but you can customize the registration form and ask for more information if necessary. To do this, click on the Customize form link (shown in the image above).

## Registration Approval:

If you do not check the “Automatically approve all registration requests” box, then you will have to manually approve of all registration requests. In most cases manual approval is probably not necessary, so you can check this option so that WebEx automatically adds registrants to the attendee list.

## Registration password:

You can optionally designate a registration password if necessary. This means that users have to enter your password just to register for the training. Superfluous? Probably…

## Registration Close Date:

You can close registration up to 11 days prior to the time of your scheduled training, or allow registrations up to the start time of the event.

## Maximum Registrants Allowed:

Trainings can have up to 1,000 attendees. This option indicates that you ought to “leave [it] blank for unlimited” registrations. The author of this guide does not know whether more than 1,000 attendees can register if no value is set here. If your training is going to be that popular, why not offer two sessions?

### Waitlist signups

If you are restricting the number of attendees to your training then you will have the option to enable a waiting list. This will allow individuals to register for your training even after it has reached its attendee limit. You must first enter a value in the “maximum registrations allowed” box and then you can check the “allow waitlist signup” box.

By default, users will automatically be added to the training if another user cancels, but you can manually register “waitlisters” if desired. Make sure to enable attendee cancellation (next option) if you want automation.

## Attendee can cancel registration:

You can allow attendees to cancel their registration up to 11 days prior to the training. Registrants will be given a cancellation URL with their registration confirmation email.
Attendees & Presenters

Invite Attendees / Presenters:

Do you like to have people at your trainings? Then this step is important! Attendees are allowed to speak and chat, but are otherwise considered consumers in the meeting, while Presenters will have greater ability to share information in the training interface. To invite people to your training:

a. Click on either the Invite Attendees or Invite Presenters button. A window will open allowing you to invite users using two different methods…

1. Type in your invitee’s contact information. (If you want to add them to your WebEx address book then check the corresponding box below the contact information area. If you want the invitee to also have host privileges then check the “invite as alternate host” box.) Then click on the Add Attendee button. (See image below.)

2. If your invitee’s information is already added to your WebEx address book then you can click on the Select Contacts button at the top of the window and add them from your contacts list.

b. Once you’ve added attendee information, click the Select All button and then click the Invite button.
**Session Options**

**Available Features:**
There are several odds and ends in this area. You can turn on and off several in-session tools and features (e.g. Chat, video, file transfer, document printing, etc.) and enable some security measures if security/privacy is a concern.

The most commonly adjusted setting here might be the attendee document privileges. You can give attendees the ability to save, print, annotate, and navigate through documents within these options. These abilities are turned off by default.

**Destination address (URL) after session:**
Users will be taken to a feedback form by default when a training session is ended. However, you can provide a unique URL if desired which users will be redirected to once the training closes.

**Greeting message:**
By default, greeting messages are turned off, but if you want your attendees to receive an automated message upon arrival then you can click the Customize greeting message when attendee joins link and type your message.

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**Breakout Session Assignments Settings**

**Options:**
You can enable breakout sessions in the middle of a training session from inside the training session interface. However, if you would prefer that breakout groups be created before the training starts then you can enable that option here. You can have WebEx automatically create these breakout groups or you can assign them manually based on the pre-session registrant list.

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**Email Options**

**Edit Email Options:**
WebEx automatically generates several emails at different points in the process of inviting, updating, registering, and/or reminding users about training sessions.

**Disable Specific Email Types**
By default, every possible auto-emailing option is turned on. If you think that users could stand to receive fewer emails then you can disable auto-emails.

**Change Email Messages**
If you want to keep the auto email(s), but you want to change the message(s), then you can do that as well. From the edit email options menu, click on the email type that you want to change and then edit the default message and click Update.
Session Information

Agenda / Description / Graphics:

All three of these optional fields will appear in the pre-session information page. (See image below.) Unfortunately, they will not appear anywhere else, so your meeting attendees might not see this unless they are trained to do so.

You can optionally add HTML in these text fields if you want to add some formatting. The supported elements and attributes are listed if you click on the question mark icons to the right of each text field.

Course Material

Files:

The WebEx system allows you to upload files to the site to share with others before a session begins. If you are using WebEx in conjunction with a course then you ought to just use D2L to share files. However, if you are using WebEx to host a training session outside of a normal ETSU course then you can use the course materials option to share files. (Note: You have a limit of 2GB for file sharing in WebEx.)

Tests

Add a Test:

Similar to the “Course Materials” option, tests are something best left to D2L (or ExamSoft if that’s more your thing). This option only allows you to add a test that you have already built inside the WebEx system. If you are interested in building a test for a WebEx session then you can read the Cisco documentation on how to do so. (URL: https://www.intercall.com/files/Training_Center_User_Guide.pdf#page=335)
4. Start or Schedule Your Session

Once you have selected all the necessary options, click on the Schedule or Start Session buttons at the bottom of the page. This will kick off automated emails (assuming you didn’t turn them off) to you as well as to all invited attendees and presenters containing basic session information, and will either launch your training session or add it to your WebEx calendar.

**Getting Your Computer Ready for a WebEx Session (Windows & Mac)**

If you have never hosted or attended a WebEx session before then your computer probably doesn’t have all the necessary software and plugins. If you are preparing to attend or host a WebEx session in the future then you will benefit from doing some setup before your session begins.

1. From your web browser, navigate to the ETSU WebEx site (URL: [http://etsu.webex.com](http://etsu.webex.com))

2. Go to Meeting Center (1), and select Setup > Meeting Center from the left navigation menu (2)

   Once you arrive at the Meeting Center page, you may need to click on the Set Up category to expand the list of options under the category.

3. Run the Set Up process
There are a couple of things you will want to check on this page, but click on the Set Up button first. This will run a quick program which will prepare your computer for WebEx. If your browser does not automatically run the file, but instead places it in your downloads folder, then be sure to locate and run the file.

If everything went well then you should see a message saying “Setup is complete.” Click on the OK button to return to the Meeting Center page.

If you encountered an error then you can contact ATS (439-8611 | ats@etsu.edu) or Cisco WebEx technical support (1-866-229-3239).

4. Return to the Setup > Meeting Center page and click on the verify your rich media players link

This will take you to a page which helps you determine whether or not you have installed several common media players. It isn’t necessarily a requirement that you have each media player installed on your computer. You really only need them if you or your host plans to share media requiring one or more of these players.

If you aren’t sure whether or not you need these, then you might want to “over pack” and install all of them just to be sure you have them for later.

Clicking on the Check Now links will open a window which will attempt to play a media file associated with each player. If no media plays then you will be given a link to download the corresponding media player. Installing all three of these media players could take time depending on your internet connection and computer’s processing speed.
Additional Training & Support

There are a lot of topics related to WebEx which are not covered by this document. If you have questions or need training or support then you have a couple of options.

Cisco Training and Support

Cisco has provided many training resources—perhaps too many even—on the web. You can find many documents, videos, and articles describing all facets of WebEx right from the ETSU WebEx site. To find these, use a web browser to navigate to http://etsu.webex.com/ and go to either the meeting or training center. Once there, look to the Support category in the left navigation. (See image below.) You can find many voluminous training materials inside this category.

Academic Technology Support at ETSU

Do you need personal assistance? No problem! Contact the ATS office. We can schedule a one-on-one training, register you for a workshop, send someone out to help you, or just give you some over-the-phone support.

You can also check the Cisco WebEx page of the ATS website, which will be updated with other training materials (documents, links, videos) and resources that may help you. Our training materials are developed for our context, so they may be more directly applicable to your scenario (i.e. they are often more concise and direct).

ATS Office

Sherrod Library, First Floor #118
439-8611
ats@etsu.edu

Support Contact: Daniel Gibson (gibsondv@etsu.edu; 439-8244)