WebEx – User Guide

Cloud Connected Audio Service Meeting Centre

Version 0.9

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CISCO Gold Partner

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Contents

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Purpose

The objective of this guide is to enable you to configure your WebEx account and use it to schedule WebEx meetings for yourself and/or a colleague.

Target Audience

This document is intended to serve anyone who is granted user privileges by their organization's WebEx administrator.

WebEx Meeting Room Types.

There are two types of Meeting Rooms, each of which has advantages and disadvantages.

- **A WebEx Meeting Room.** This room is created for you by default when an administrator first sets up your account with your user name and a default password.

    - You do not need to do anything special to set up or access it

    - Each meeting has its own access code so that users cannot access a meeting unless you invite them and provide the code

- **A Personal Meeting Room.** You create this room when you first access WebEx and customize your password.

    > **Note:** You must create a Personal Room.

    - The access code is stable, like the PIN for your personal audio conference sessions. You can change the code should you wish to do so.

    - Precise meeting start and end times are not needed; the room is always available

    - To use the room, a Host goes to WebEx, opens up **Meeting Info** and sends the information to colleague(s)

        - *Audio only participation:* Call the toll free number and enter the room's 9-digit access code

        - *Computer participation:* Enter room's URL, enter the 9-digit access code and then enter the 2-digit Attendee ID that will appear at the bottom of the meeting info that appears **Setting Up Your Account**
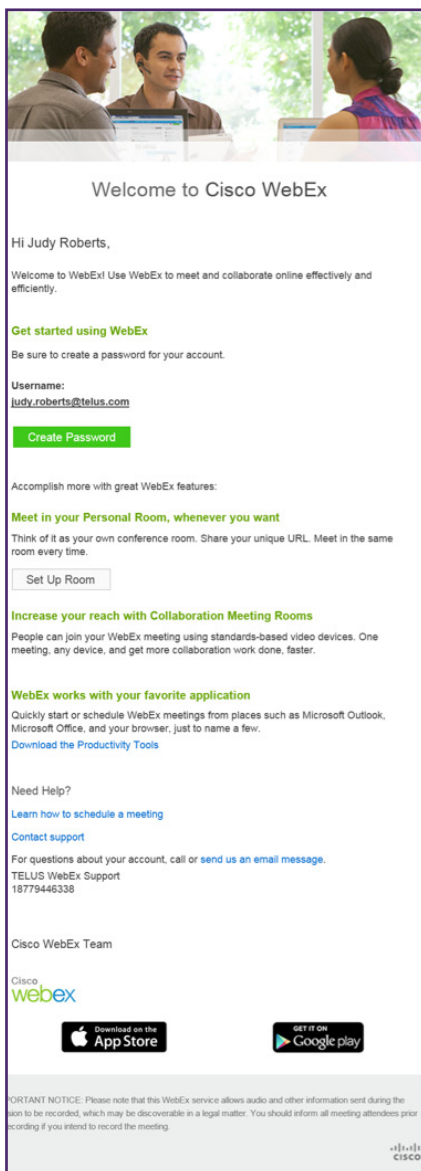
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Figure 1: Welcome Message

When the administrator sets you up, WebEx generates an automatic message welcoming you to the service (Figure 1).

- Click on the green **Create Password** button in Figure 1

- Create a customized password (PW) that meets the criteria shown in the WebEx popup

- It is not necessary to go back to this email to choose Set Up Room; you can do that in WebEx

> **Note:** Typically, your user ID will be your organizational email and your PW will be one you choose. If the feature has been enabled by your administrator, a **Single Sign-on** (SSO) option will be available that enables your corporate computer logon ID and PW to be applied to WebEx.
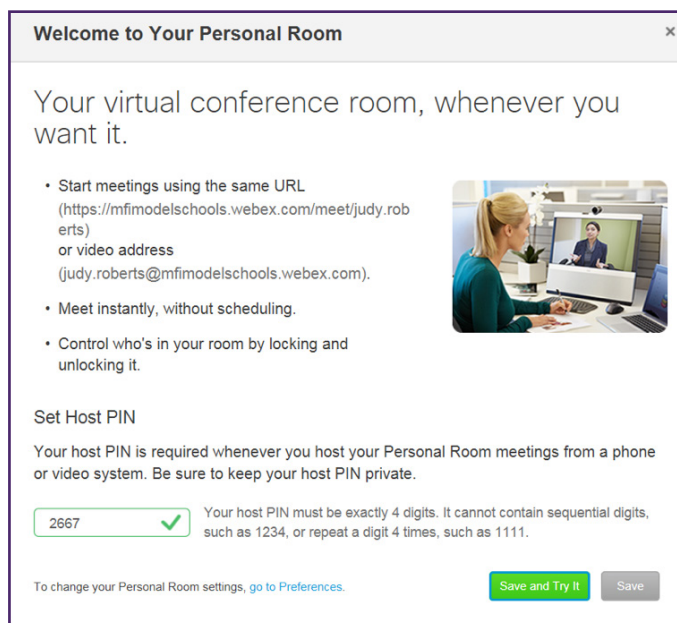

Figure 2: Welcome to your Personal Room

Once you have set your password, Figure 2 will appear on your screen. Make a note of the 4-digit Host PIN. As stated in the message in Figure 2, you will need to use it if you are dialing into your room from a phone or if you are entering the room using a video conference system instead of your laptop/PC. It is not necessary to return to this page to choose **go to Preferences** to set your room; you can do so from WebEx.

Review of Main Pages.

Log In Page.

Enter the URL of your site [e.g., abc.webex.com] and Figure 3 will appear. Push **Meeting Center** and Figure 4 appears.

> **Tip:** If you do not see the banner with options such as Meeting Center, look for a faint up arrow near the top of the image and press it. ⌃
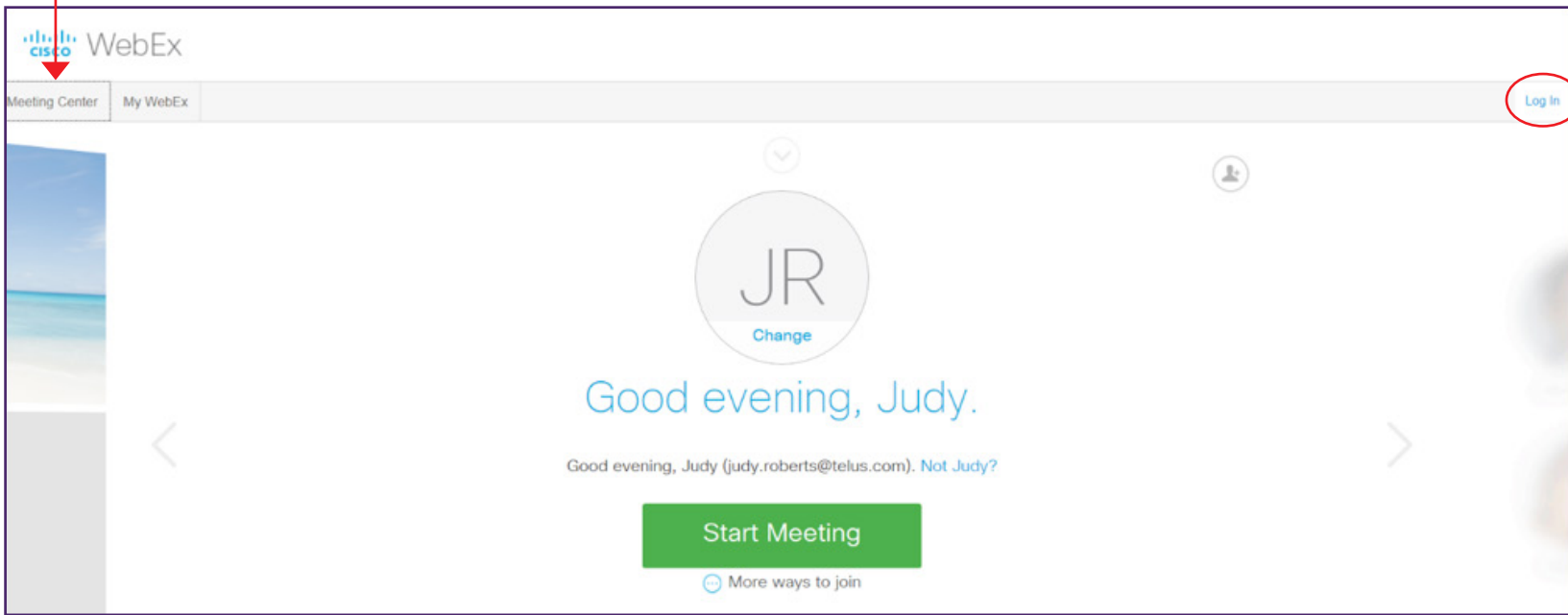

Figure 3: Initial WebEx Page with Log In Option

The options on this page are significantly more limited than those available to you when you login. The **Meeting Center** drop down menu provides a quick overview of your meetings and a few other options, several of which such as **Host a Meeting** require you to login (Figure 4). That **Login** menu is identical to the one accessed by the ⬚Log In button circled in red in screen's top right corner and to the one that appears if you select the **My WebEx** option next to the **Meeting Center** button.

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If you press the green **Start Meeting** button before you log in, the Login screen (Figure 4) will appear requiring you to log in.
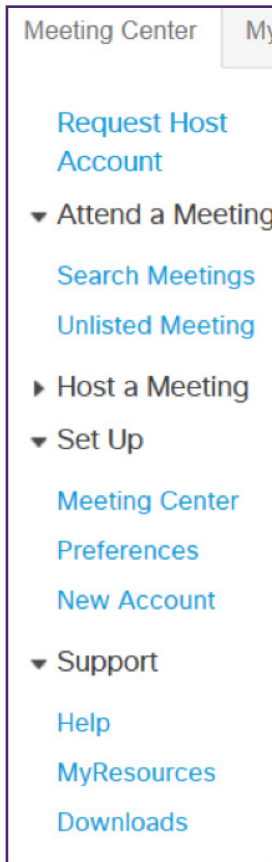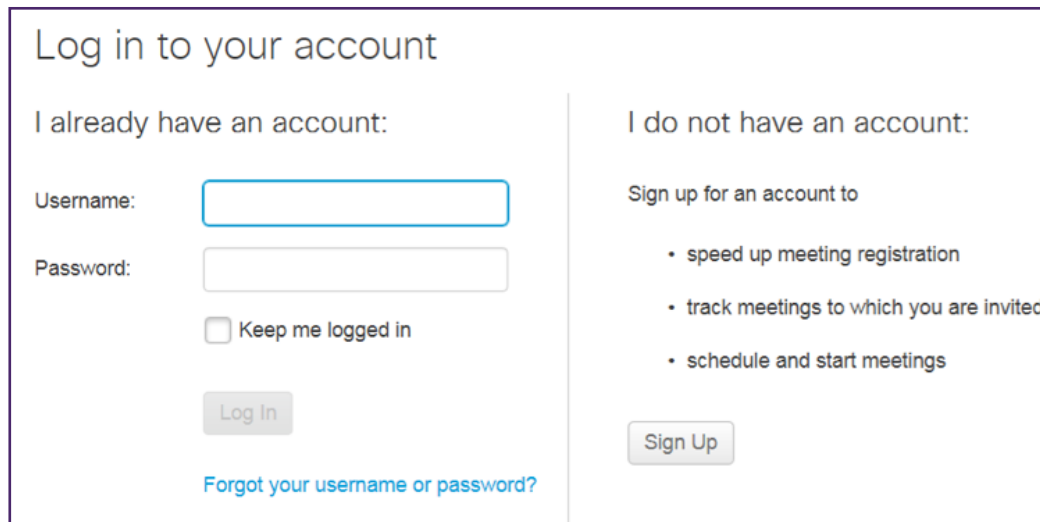

Figure 4: Meeting Center

Figure 5: Login In / My WebEx / Host a Meeting

Main Page

When you login to your account, the menu in Figure 6 will appear. Note that the only two menus to be used are the **Meeting Center** and **My WebEx**. (You will not see the **Site Administration** option if you do not have administrator rights to your WebEx service.)
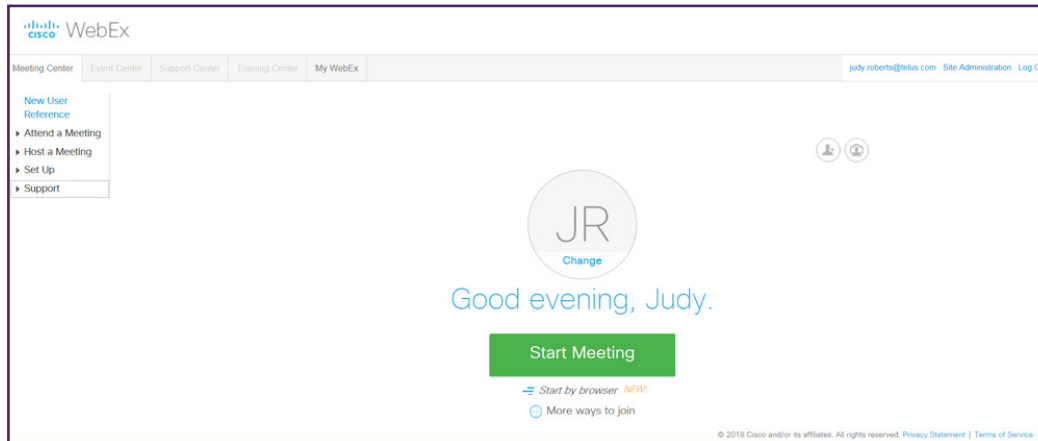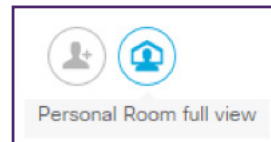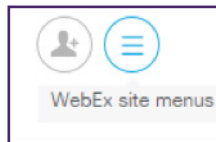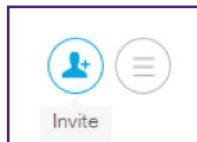

Figure 6: Home Page once Logged In

There is also a blue forward arrow ❯ that accesses a list of Personal Rooms that you have visited (Figure 7).

Figure 7: Recent Personal Rooms

There are two faint icons on this page:

One allows you to invite participants; the other activates the WebEx Menus.

Once you access the menus shown in Figure 6 above, the icon changes to tell you that you are in your personal room.

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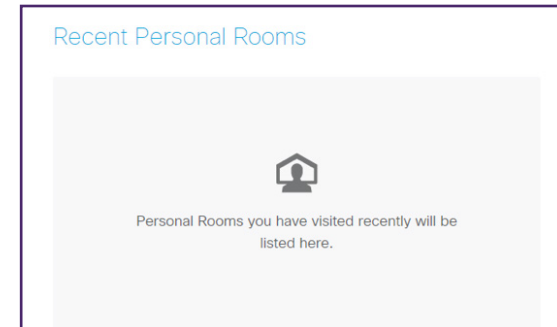
Productivity Tool

The **Productivity Tool** is an application that can be added to your Outlook to facilitate adding WebEx to any meeting that you book in Outlook. The menu in Figure 8 enables you to download and install the application as part of your initial WebEx set up.

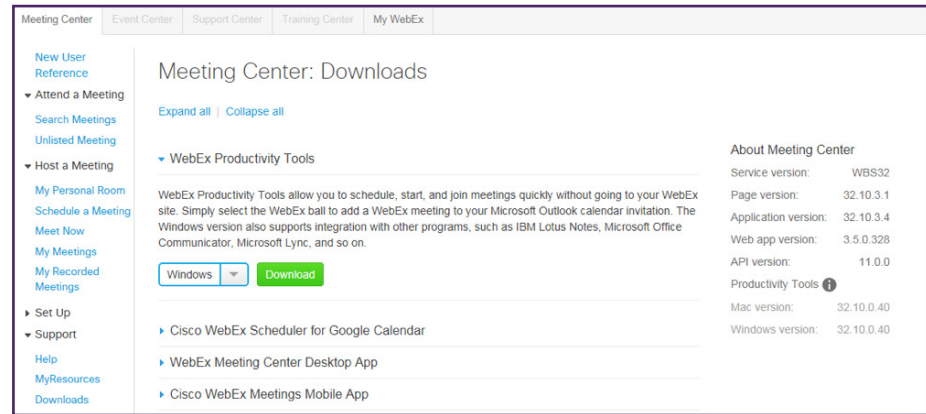Figure 8: Productivity Tool Installation Menu

Figure 9: Meeting Center: Downloads WebEx Productivity Tools

If Figure 8 does not appear automatically when you are setting up your WebEx account, follow these steps:

- Go to your company's WebEx site [e.g., abcbank.webex.com]
- Choose **Support → Downloads → WebEx Productivity Tools** from the **Meeting Center** drop down menus
- Choose Windows or Mac as appropriate and then press the Download button (Figure 9)
- Follow the prompts to install and save the **Tools** and the icons shown in Figures 10 and 11 will appear automatically in your **Outlook** email and calendar menus
- Consult an appropriate internal resource if you need assistance installing the Tools

> **Tip:** If the icons shown in Figures 10 and 11 do not appear automatically, close and re-open Outlook.
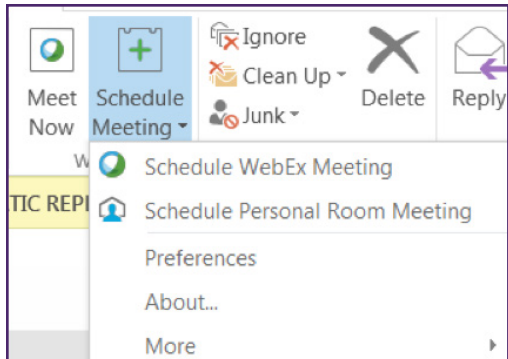
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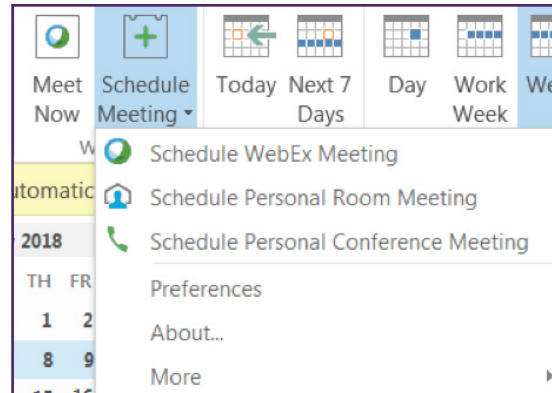
Figure 10: Icons in Outlook Email

Figure 11: Icons in Outlook Calendar

Figure 12 shows the generic information provided when **Preferences** (Figures 10 and 11) is chosen. Figure 13 shows the options available when **More** is chosen from either Figure 10 or Figure 11.

Note that configuring a **Personal Conference Meeting Number** must be included in a signed SOW and set up in WebEx before it can be scheduled. It is audio only, uses an 8 digit (instead of standard 9-digit) code and, unlike the other WebEx meeting types, cannot upgrade from audio to content sharing (websharing) during a meeting.
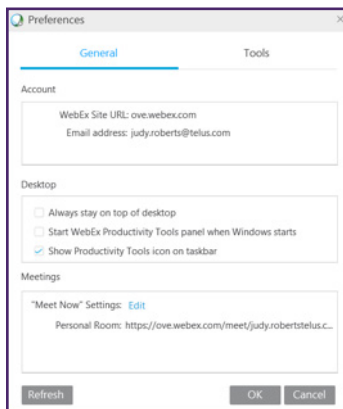

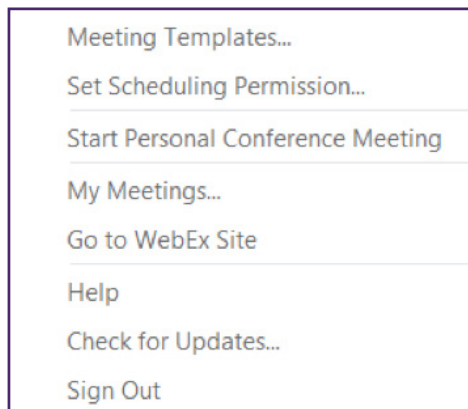**Figure 12: Preferences**

Figure 13: More

Meeting Templates and Scheduling Permissions are created in WebEx (see information related to Figure 21).

Tip: Do not use the **Sign Out** option in Figure 13.

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Scheduling WebEx Meetings.

Once the **Productivity Tool** has been installed, you can schedule your meetings for a future date and time:

- Using Outlook from either your email or from your calendar or
- Directly in WebEx

The meetings can use either a WebEx Meeting Room or your Personal Meeting Room.

It is also possible for one person to book another person's Personal Meeting Room. For example, an Executive Assistant (EA) could book an Executive's Personal Meeting Room once the following three prerequisites are met:

- Each person must have a WebEx host account with a Personal Meeting Room
- The EA must have complete access to the Executive's Outlook calendar
- The EA or the Executive needs to go to the Executive's WebEx, choose **My WebEx → Preferences → Scheduling Options**, add the EA's email address in the Scheduling Permission box (Figure 14) and press Save
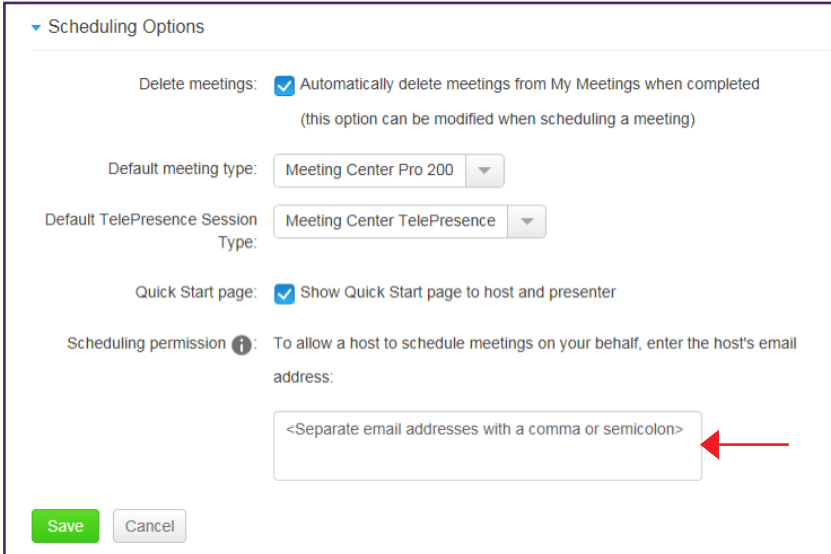

Figure 14: Configuring Alternate Host for Personal Room

Once these steps are completed, the EA can schedule a meeting from the Executive's calendar; the invitation will invite participants to the Executive's Personal Meeting Room. For convenience, the remainder of this section uses language assuming that someone is booking their own Personal Room, but the content applies to an EA booking a meeting for an Executive.

Both Outlook and WebEx scheduling options are described in this section. It is **highly recommended** that you use Outlook. With each of these scheduling options, you can use either a WebEx Meeting or your Personal Room. Note also that you can start meetings right away in either Outlook or WebEx (see Figures 25 and 26).

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Using Outlook

WebEx Meeting

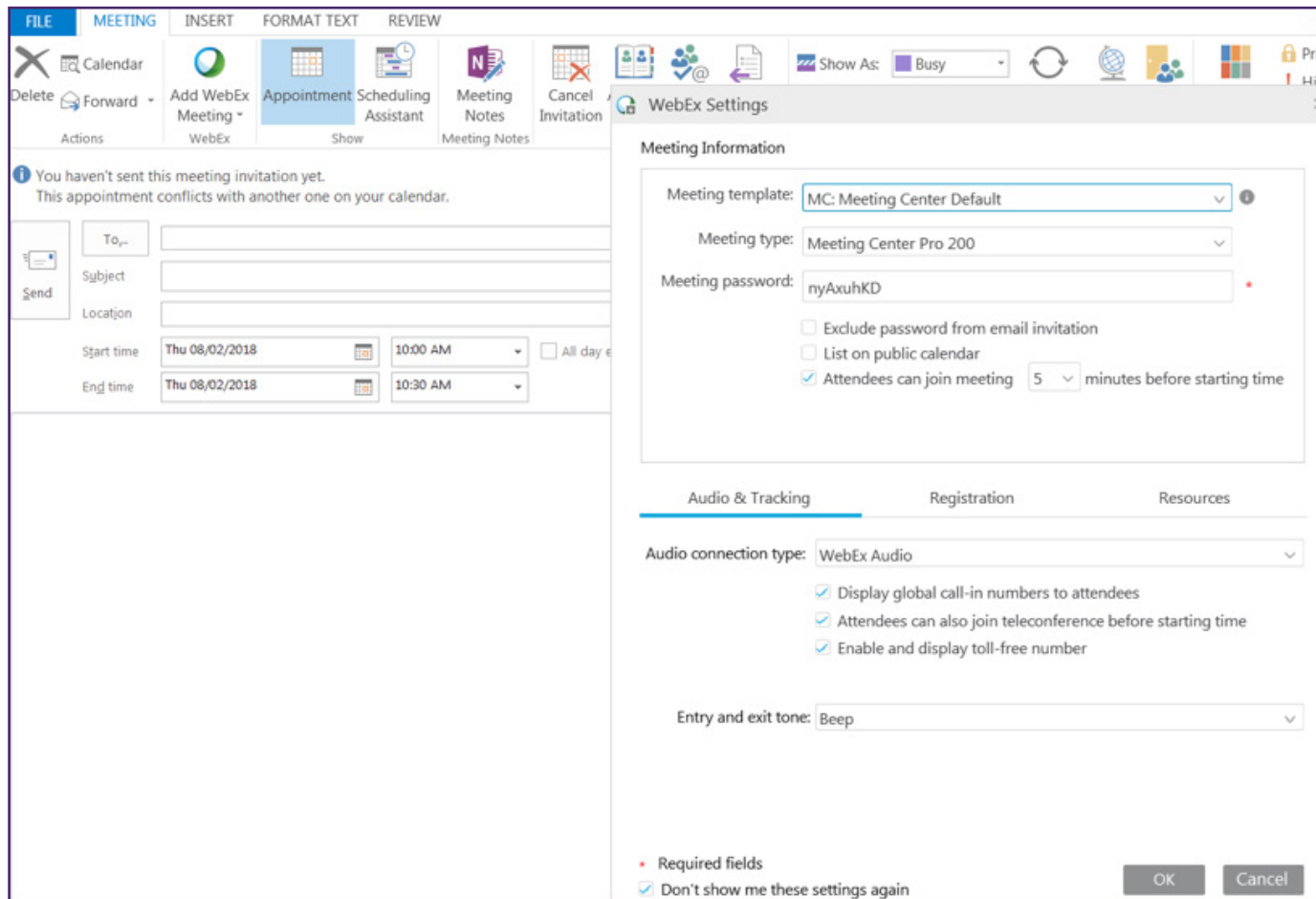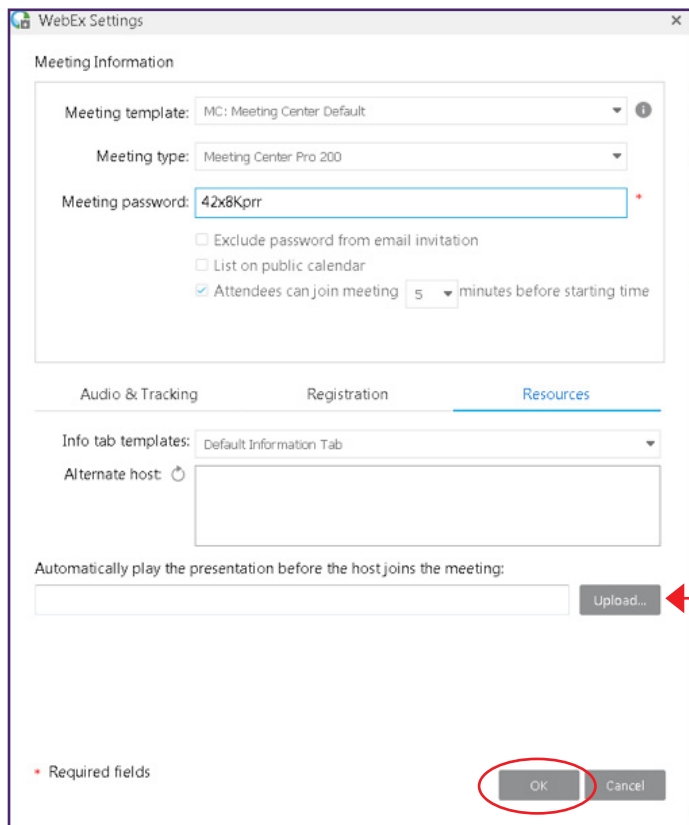In your email choose **Schedule Meeting** → **Schedule WebEx Meeting**. Figure 15 will appear.

Figure 15: Schedule WebEx Meeting via Email

WebEx Settings

The Audio & Tracking menu appears by default. Two categories may need to be adjusted:

- Meeting Template: If you have not created custom templates in WebEx (see Figure 21), the default template will appear. If you have other templates, the most recently used template will appear and you may need to change the template to be used.
- Audio Connection Type: WebEx audio appears be default and is the recommended option. You can customize the audio to another teleconference service or VOIP. Consult your administrator for guidance.

Figure 16: WebEx Settings - Resources

Adding a Document.

The **Resources** section (Figure 16) enables you to specify an alternate host and to upload a file (PDF, PPT or MP4 format) that participants can access before the host joins the meeting. Enter the URL of the file in the **Upload** line and then press the **Upload** button.

When you have completed either the **Audio & Tracking** and/or **Resources** sections, press **OK** and Figure 17 will appear. The information at the bottom of the message is added automatically by WebEx.
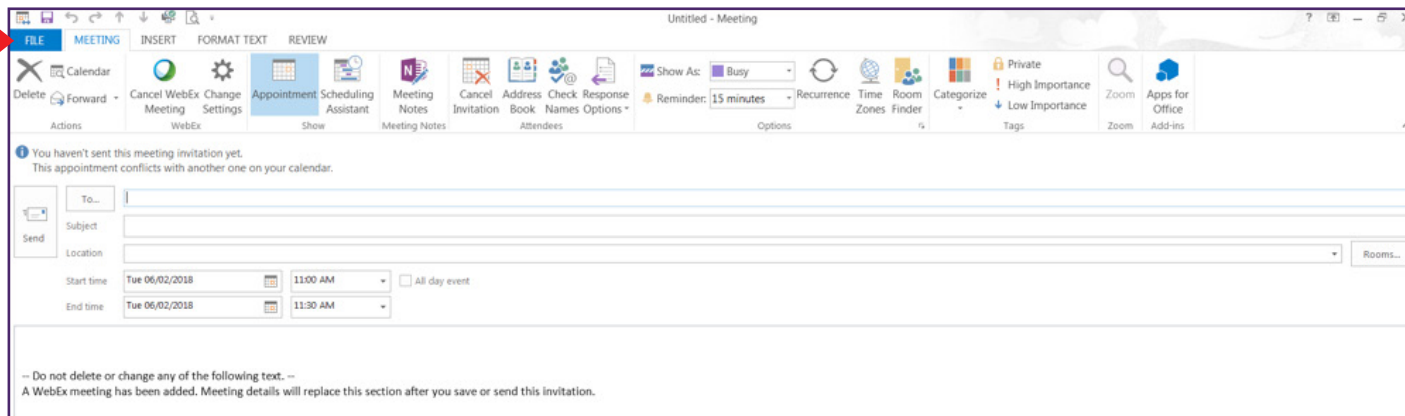

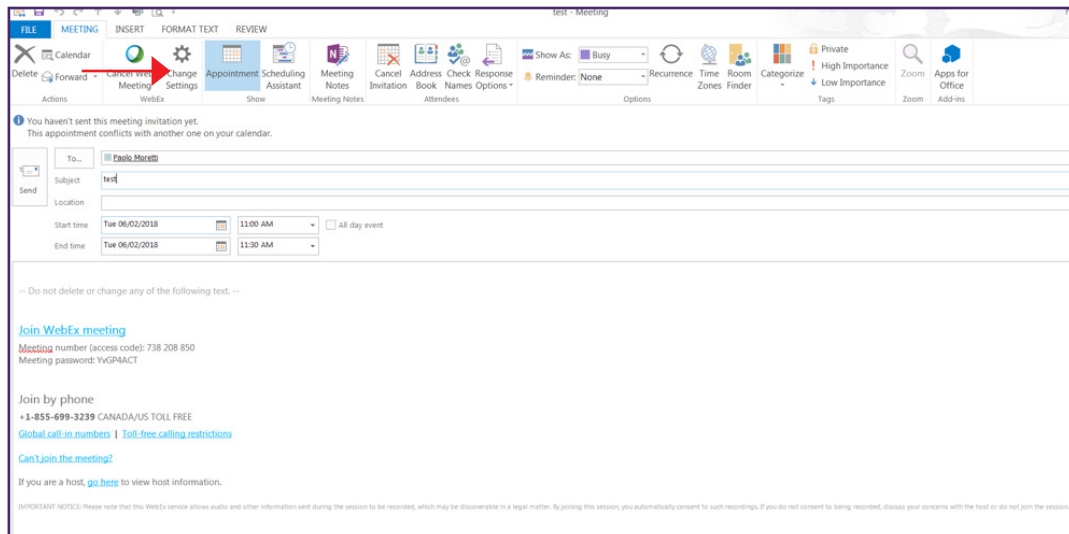Figure 17: Scheduling a Meeting in Outlook Email

Figure 18: Populating a WebEx Meeting Invitation

Once you add a name and subject and press the **Save** icon in Figure 17, the more detailed information in Figure 18 appears as your draft email.

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Unless your organization has a customized service, the invitation is pre-populated with a Canada/US toll free number and hyperlinks to lists of **Global Call-in Numbers** and **Toll-free numbers** that are part of TELUS' standard WebEx offering. Consult your administrator if you need a number that is not on the list. Figure 18 uses a default template; your organization may have created a customized template.

> **Tip:** You cannot change this type of template; a WebEx adminstrator in your organization has to do so.

To schedule in your calendar, choose **New Appointment** → **Add WebEx Meeting** → **Add WebEx Meeting**; Figure 17 will appear. Once you add a name and subject and press the **Save** icon in Figure 17, the more detailed information in Figure 18 appears in your draft email. To access the **WebEx Settings** menu from the calendar, click on the gear **Change Settings** icon in Figure 18.

> **Tip:** The **Join WebEx Meeting** information will always appear if you have to circulate a revised invitation, regardless of any other types of changes you make to the meeting invitation.

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Personal Room

In either your email or your calendar, follow the processes above but choose **Schedule/Add Personal Room** instead of **Schedule/Add WebEx Meeting**. Figure 19 will appear, pre-populated with information similar to that in this sample invitation.
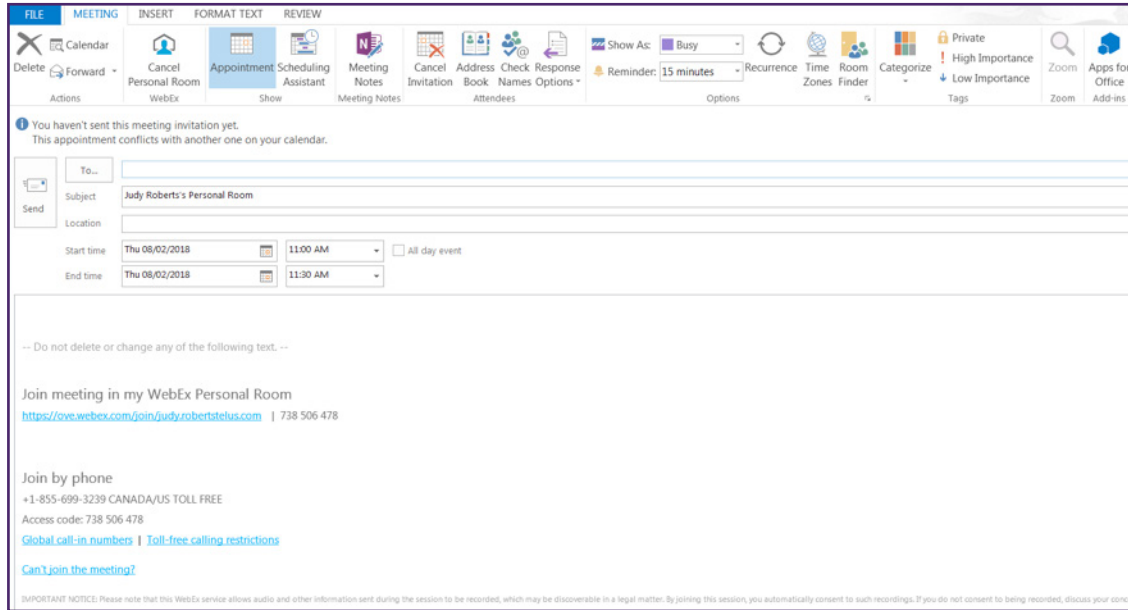

Figure 19: Personal Meeting Room Invitation

Adding a Document.

When scheduling a meeting using a **Personal Room**, the document needs to be attached to the invitation following normal practice; it is not possible to use the **WebEx Settings** menu.

Using WebEx

Use the **Meeting Center → Host a Meeting → Schedule a Meeting** path to access Figure 20 to schedule a meeting. Many of the features described in this section apply to the next section regarding starting a meeting right away.

To schedule the meeting, enter the required **Meeting topic** and **Password**.

Tip: You can change the password that automatically appears to anything you wish. The **Date**, **Time**, **Duration** and **Attendees** also need to be populated. Other attendee features are optional.
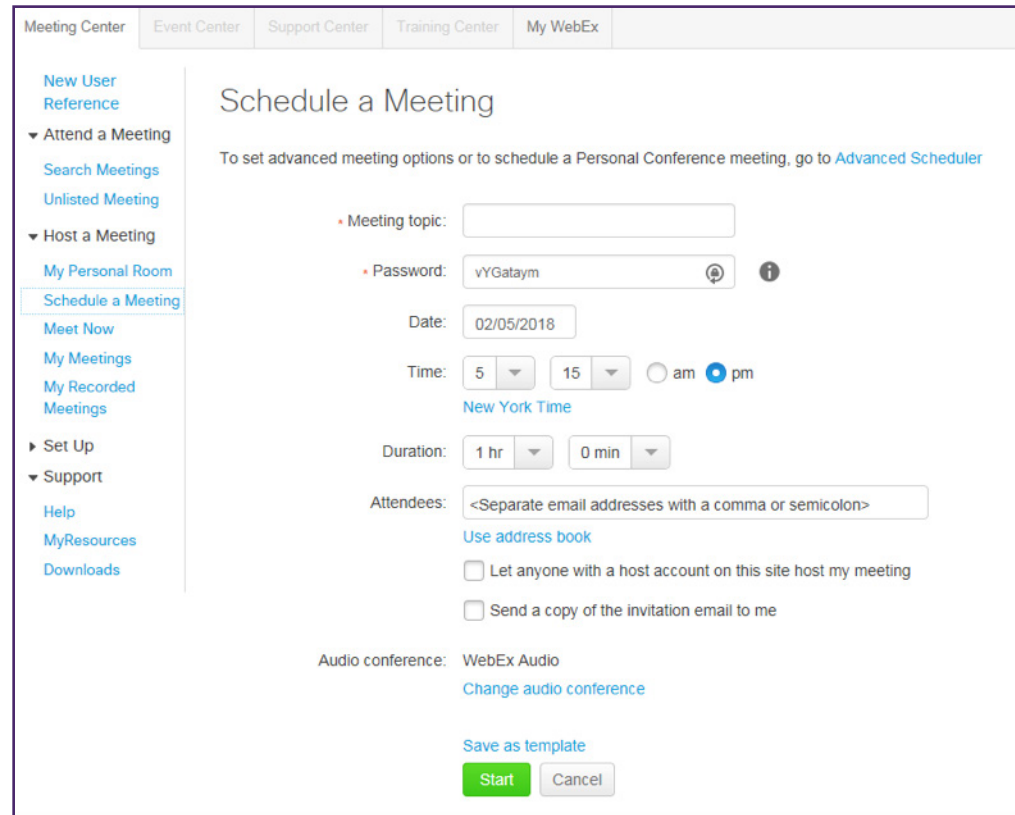

Figure 20: Schedule a Meeting in WebEx

Special Features

The balance of this section will now examine three special features:

- Advanced Scheduler
- Address Book
- Adding a Document

Advanced Scheduler

Figure 21 shows the **Advanced Scheduler** menu; specialized features are described on the following page.

Figure 21: Advanced Scheduler Menu

Meeting Type: Leave at Meeting Center Pro 200 unless directed to do otherwise by your administrator.

Audio Conference: This hyperlink takes you to the same options (Figure 22) as in the standard scheduling menu (Figure 20).

WebEx Audio gives the option that WebEx will call out to participants at whatever number they provide; Other *teleconference* means that you could use another service such as a proprietary conference bridge, *VOIP* enables you to use the built-in mic on your laptop or *None* is also an option.

Figure 22: Audio Conference Settings

Invite Attendees: There are some options to choose from in terms of letting someone else host the meeting or excluding the PW from the invitation.

Registration: The default is best left at **None**.

Agenda and Welcome: This tab enables you to upload a file to include with your invitation so that it can download automatically when a meeting starts.

Meeting Options: Unless there is a reason not to, do not change the default settings.

Attendee Privileges: Review these carefully to choose what you might want to add to the default options of allowing people to see the participant list, to remotely control someone else's presentation and to allow everyone to chat.

Template Option: Note that you have the option to review your invitation before sending it and to save its parameters as a template for future use.
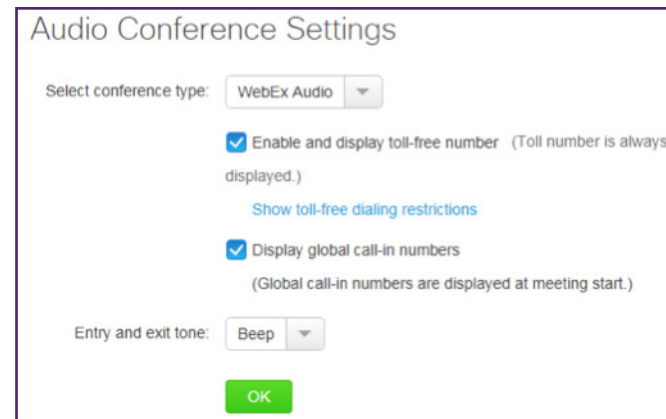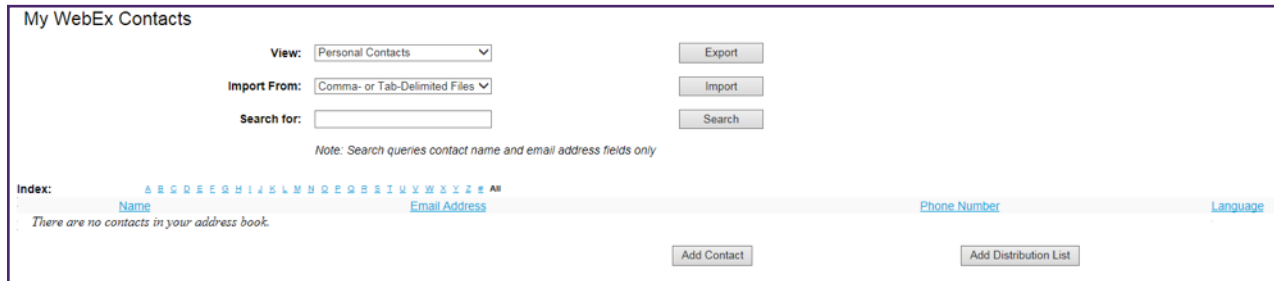
Address Book

You can create an **Address Book** by going to **My WebEx → My Contacts**. When Figure 23 appears, add names by pressing the **Add Contact** button as often as necessary.
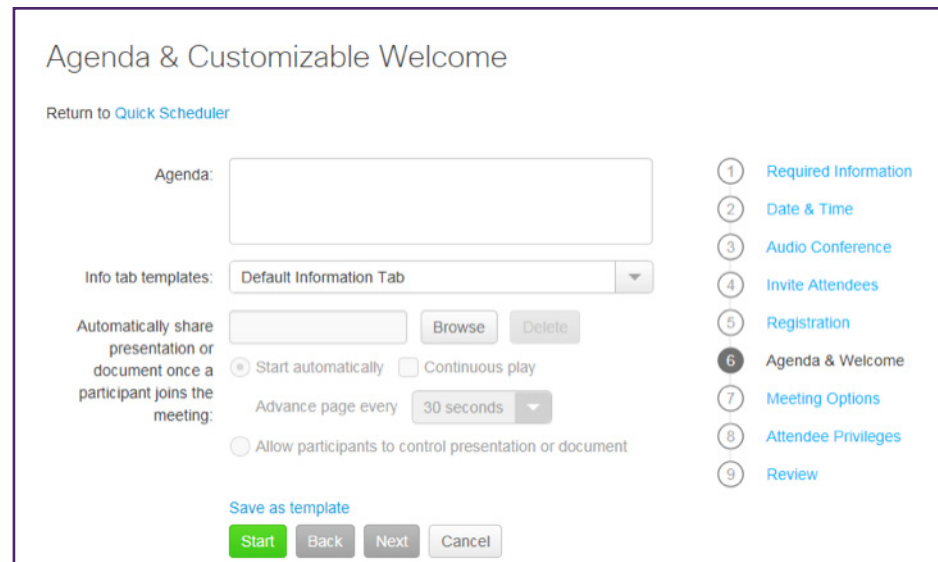

Figure 23: Creating an Address Book

Adding a Document.

If you want participants to be able to download a document at the time that they log into the meeting and to have the presentation start automatically, use the **Advance Scheduler** option to schedule your meeting and add the file in the **Agenda and Welcome** menu (Figure 24).

Browse to the file that you want to add to the meeting invitation and upload it. PDF, PPT and MP4 files are supported.

Figure 24: Agenda & Customizable Welcome Menu

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Scheduling a WebEx Audio Call.

You can schedule an audio call using the telephone information displayed in any meeting invitation by copying the relevant toll free or other telephone number into a standard email invitation and adding the 9-digit access code of your personal meeting room.

> **Tip:** If you wish to record an audio-only call, you must use the standard WebEx invitation and someone must go into the WebEx menu (Figure 32) to start the recording.

Starting a Meeting Now.

If required, you can also start a WebEx meeting immediately rather than scheduling it for a future date and time. This section describes how to start a WebEx meeting immediately using either Outlook or WebEx.

In Outlook

Use the process described in the **Scheduling a Meeting** section with immediate dates and times.

In WebEx

Press the **Invite** icon (Figure 25) on your **Login Page** (Figures 3 and 6) and follow the instruction to enter the email addresses of those you wish to invite.
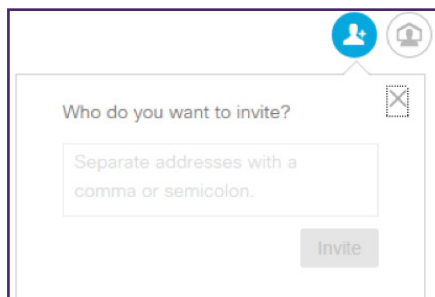
Figure 25: Invite icon

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Invitee(s) will receive an invitation to your personal meeting room such as the example in Figure 26. You can start the meeting for them by pressing the green Start Meeting button on your main page (Figure 6).
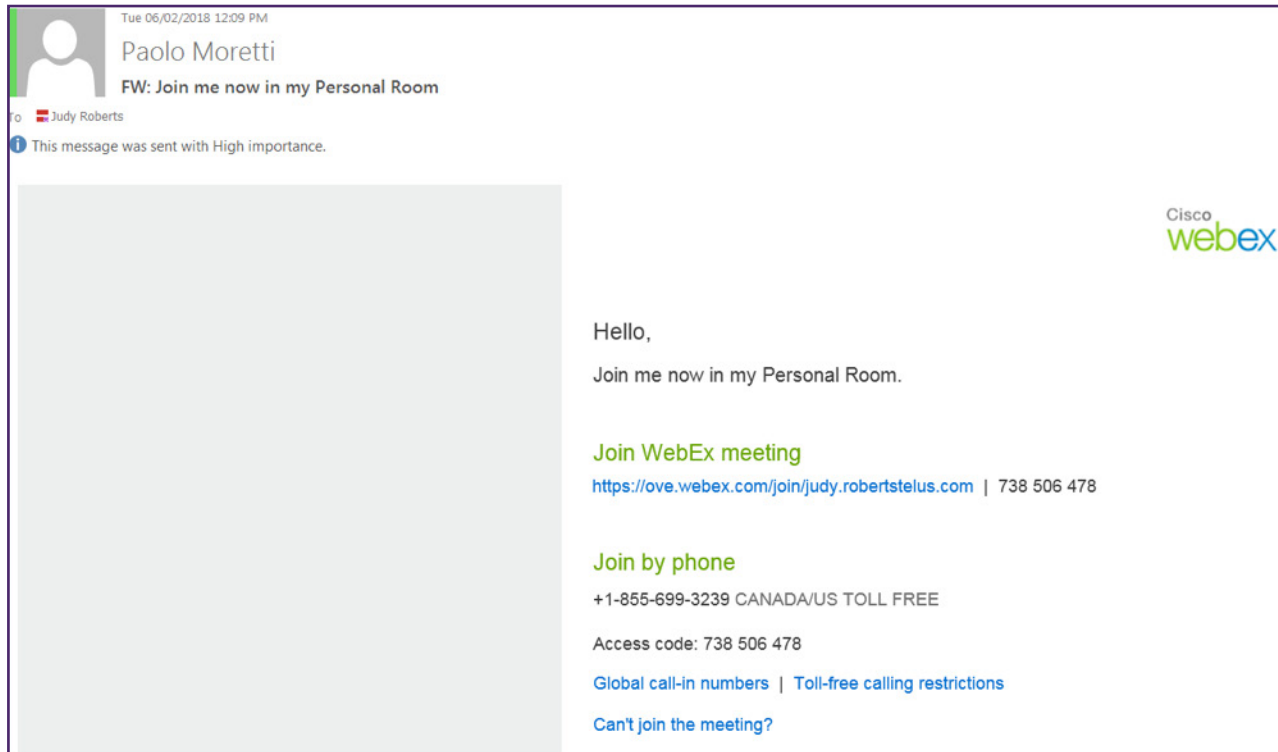
Figure 26: Start Now Meeting Invitation

Accepting a WebEx Meeting Invitation.

With Productivity Tool.

Accept the standard meeting invitation that you receive and the meeting will automatically appear in your calendar if you chose to **Accept** or to be **Tentative** (Figure 27).

> **Note:** Meetings will also automatically appear in your calendar if you are using Google.
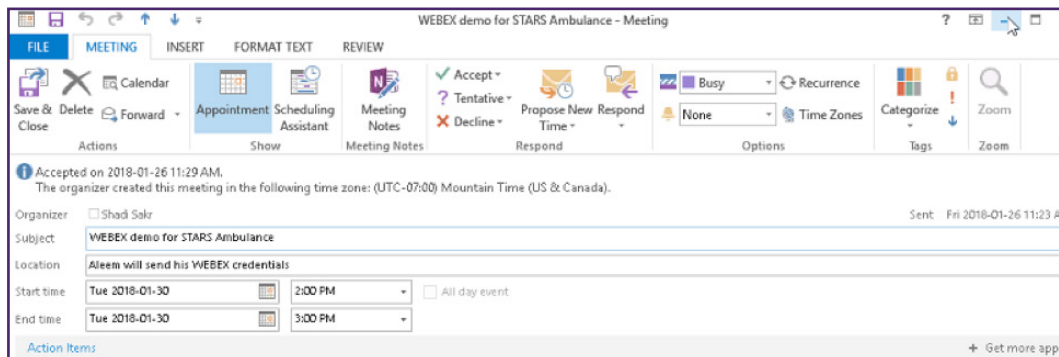
Figure 27: Accepted WebEx Meeting Invitation – Productivity Tool Calendar View

Without Productivity Tool.

If you do not have the Productivity Tool, you will receive an invitation resembling Figure 28 that requires you to manually add the meeting to your calendar as directed and then double click on it to get the options shown above in Figure 27 to accept, be tentative or decline.

Figure 28: Meeting Invitation without Productivity Tool

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Starting / Entering a WebEx Meeting.

Waiting in the Lobby.

If someone comes to a Personal Meeting Room before the host starts it, the participant will see a message on the WebEx screen saying that s/he is waiting in host's personal lobby and the host will receive the email message in Figure 29. Participants will be able to join as soon as the host starts the meeting or if the host presses the **Enter Room** button in the email.
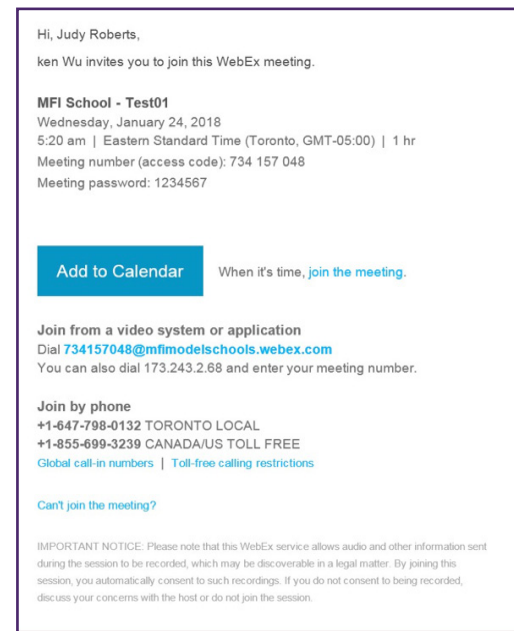
Joining the Meeting.

When entering the meeting, the popup in Figure 30 will appear. The first time it appears, the box that now shows a number will be empty. Once it is populated the first time, it will always be populated as shown in this menu. If required, the number can be changed meeting by meeting. As needed, select a video camera to be used during the meeting. As shown in Figure 30, this phase can be skipped.

Figure 29: Participant Waiting in the Lobby

> **Tip:** Note that if you join the meeting from the link in the invitation you sent/received, you will not be prompted to enter a password because it is embedded in the invitation. If you enter the meeting via the generic WebEx site (www.webex.com), then you will be promoted for the 9-digit meeting ID and the password.

> **Tip:** If a host is unable to open his/her meeting, an EA can open the WebEx meeting and be called at the standard number chosen in Figure 30 and then forward that call to an executive's cell phone. Other attendees will be able to dial in/ be called as normal.
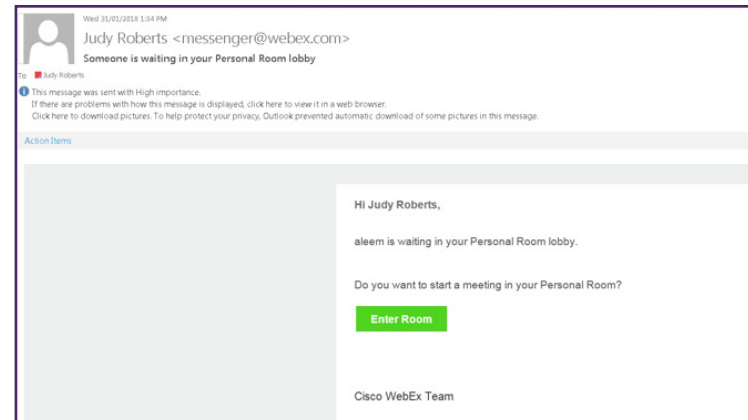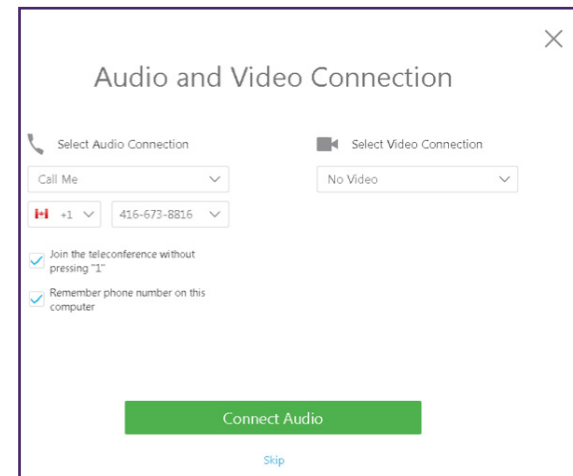

Figure 30: Audio and Video Connection Menu

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Audio only

If either the host or a participant does not have access to full WebEx, s/he can dial the toll free number in WebEx meeting invitation and, when prompted, enter the 9-digit meeting code.

Cell Phone Tips.

From your cell phone, go to the App store, search for Cisco WebEx Meeting and download the app. There are two participation options:

- From the app, click on the phone icon and choose **Call Me**. If auto call me is enabled, the app will always call that number as soon you enter a WebEx meeting.
- From the app, if **Call In** has been chosen, all the numbers and codes will populate automatically

> **Tip:** If calling in from a mobile phone that has the WebEx app, the incoming call will automatically be muted regardless of which of the two participation options has been used. Unmute yourself within the app, not from the mute function on your phone. To remove this function, click the gear icon on the top corner of the app, scroll down to **Mute on Entry**, and turn it off.

Upgrading from audio to websharing.

If a participant wants to change from audio-only to full WebEx participation, the host must email the personal room's URL to that audio participant, who can then add video without having to hang up and dial in again.

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International Calling

Security

For WebEx data, Cisco has achieved ISO 27001 for the WebEx Services on October 2012. Certification is renewed every three years with an annual interim external audit. ISO 27001 is an information-security standard published by the International Organization for Standardization (ISO) that provides best-practice recommendations on creating an information-security management system (ISMS). An ISMS is a framework of policies and procedures that includes all legal, administrative, physical, and technical controls involved in an organization's information risk-management processes. According to its documentation, ISO 27001 was developed to "provide a model for establishing, implementing, operating, monitoring, reviewing, maintaining, and improving an information-security management system." Refer to this link for additional information on ISO 27001 and 27002: http://www.27000.org/.

The phone call has standard international call security with no special enhancements.

Calling Codes

Cisco has provisioned toll free dialing for 100 countries. Every meeting invitation is prepopulated with the international list + a 61 page Cisco guide. If there is no code for a country in that drop down list, complete the **Call Me** line in the **Audio and Video Connection** menu (see Figure 30) to be called.

Reminding Missing Participants.

Press the **Invite & Remind** icon on the main screen (Figure 32). As shown in Figure 31, a number of options are available to reach out to participants who are not yet in the meeting.
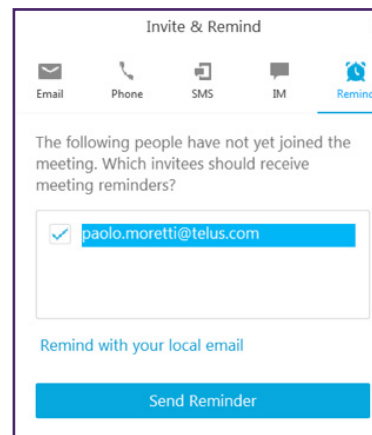

Figure 31: Host Invite & Remind Menu

Managing your WebEx Meeting.

Figure 32 appears when the host joins the meeting; participants have a very similar screen.
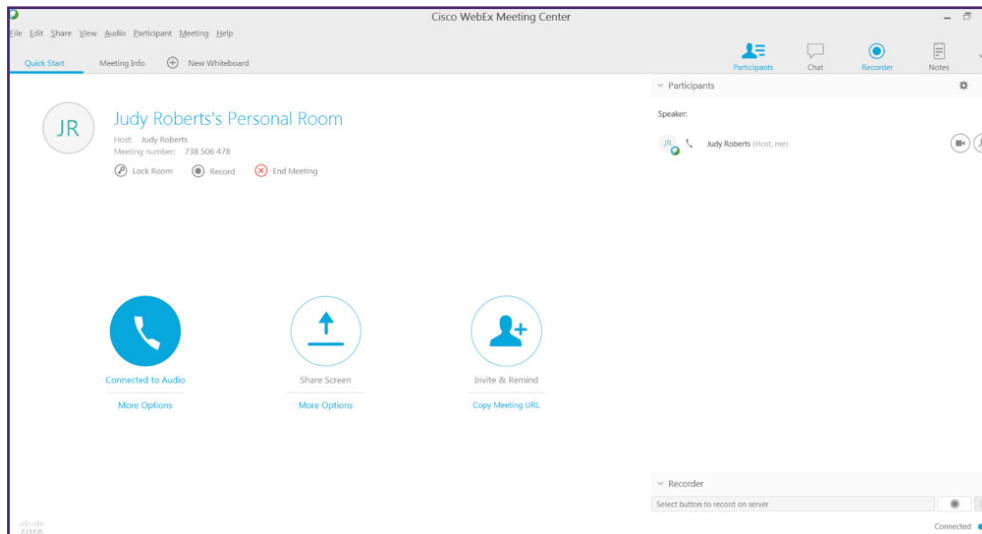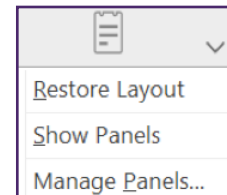

Figure 32: Host's Initial Screen after Joining Meeting

Note that this specialized menu appears when the down arrow next to the **Notes** icon is pressed. The **Manage Panels** is an advanced function that should only be used by an administrator who may or may not need advice from TELUS.

Sharing & Annotating a Presentation.

Press the **Share** icon in the top task bar to see the list of available options. **My Screen** or an **Application** are two of the most commonly used options.
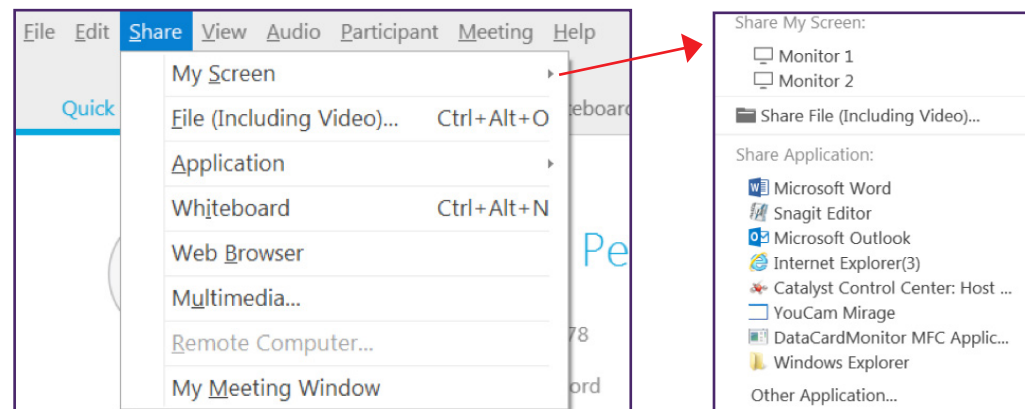

Figure 33: Share Options

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Figure 32 appears when the host joins the meeting; participants have a very similar screen.
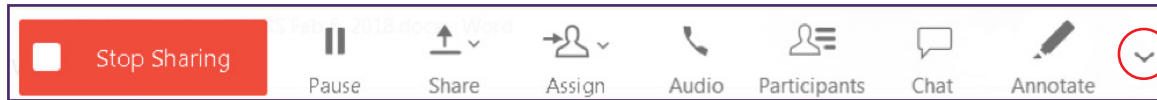

Figure 34 appears when the down arrow at the extreme right of the floating bar is pressed. This same list may appear on other drop down menus.

To share multimedia directly instead of from your screen, enter the URL of the site you wish to view in this menu that appears when you select Multimedia from the **Share** drop down menu (Figure 33). The **Multimedia Viewer** will appear (Figure 35). Once a file starts playing, Figure 35 appears.
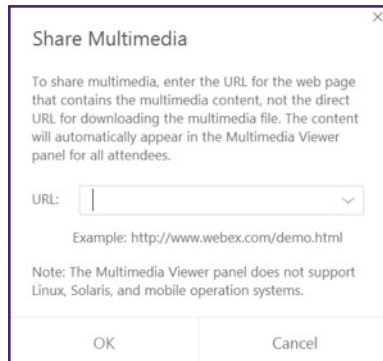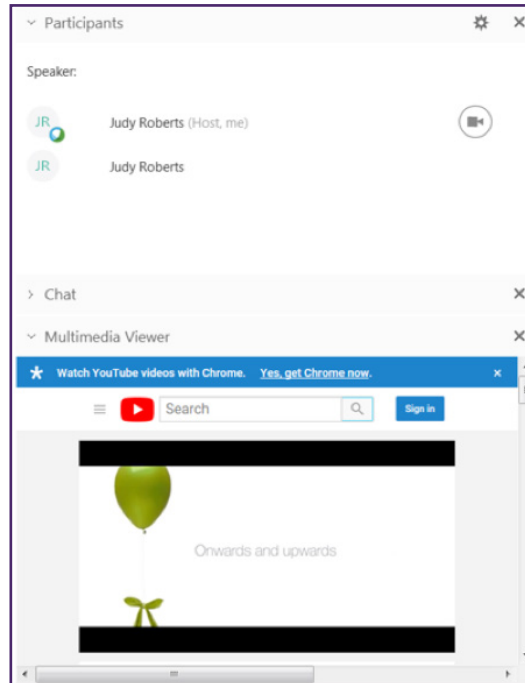

Figure 34: Other Choices

Figure 35: Share Multimedia

Figure 36: Multimedia Viewer

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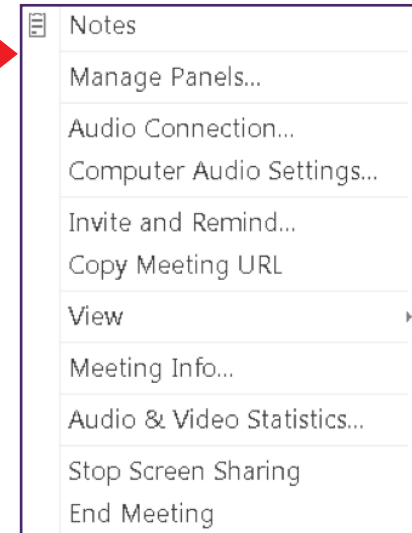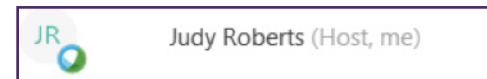
Assigning Presenter Privileges.

When a session first starts, the host is, by default, the presenter as indicated by a "WebEx ball icon" beside the host's name. The phone call has standard international call security with no special enhancements.

Presentation rights can be transferred to any participant in the list by dragging and dropping the ball; either the host or a participant can make that change. The floating bar in Figure 37 appears when someone other than the host is sharing a presentation.

Figure 37: Floating Bar during a Participant Presentation

Sharing Control

When the floating bar in Figure 37 disappears, Figure 38 appears with icons enabling the host to **Ask for Annotation** permission and to **Ask for Control** during a participant's presentation. Once the participant agrees, the host can control the participant's computer.
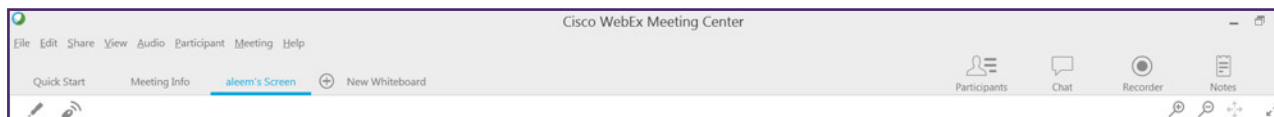

Figure 38: Host View during a Participant Presentation

Notes

The **Notes** option is always available. Type your notes then save them.   WebEx automatically gives an option on your computer to save in .txt format.

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Whiteboarding

When you click on **New Whiteboard** (Figure 32), Figure 39 appears with annotation options and the ability to open a new whiteboard. The controls on the right are zoom in & out, as well as enlarge to full screen.
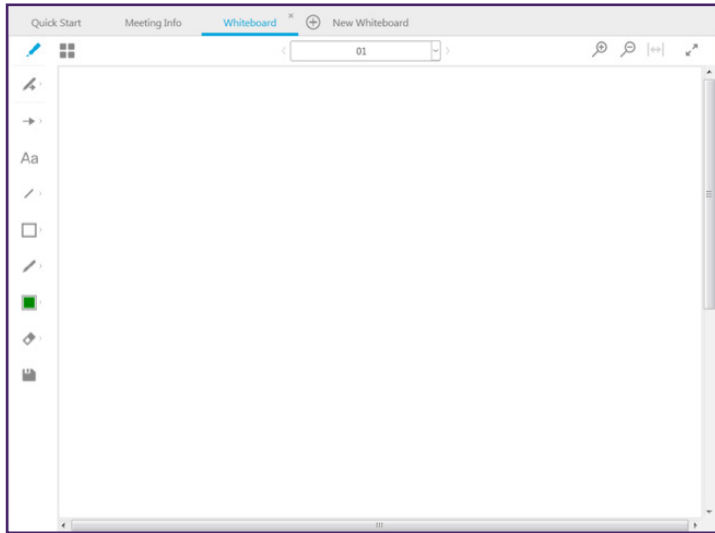

Figure 39: Whiteboard Menu

Using Chat

When the **Chat** icon in the top task bar is pressed, it turns blue and a chat menu appears at the bottom right of the screen enabling messages to go to everyone or to a chosen individual. If you have a message waiting, the icon will be red. Press the blue **Chat** icon to make the menu disappear.

Tip: Go to Edit → **Preferences** if you want to hear a beep every time someone sends you a message.
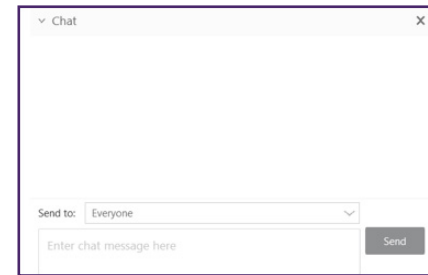
Managing Audio

Volume

The host and each participant should manage the sound that they hear using the incoming volume control on the telephone/audio device that they are using in the meeting.

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Muting

Host Controls

Select **Participant** from the top Task bar and either mute participants individually or choose **Mute all**.

Participant Controls

Depending on the audio device that used, participants should be able to mute themselves using the controls on the device or by pressing the mic icon on their name bar in the participants list.


Managing the Camera.

If you have a camera associated with your laptop and press the grey camera icon opposite your name in the participant list, your image will appear as shown in the example below. You may stop and restart sharing your image by pressing the camera icon.
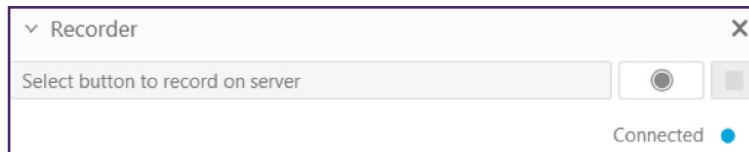

Tip: Press the gear icon to the right in the participants bar to configure your video options.

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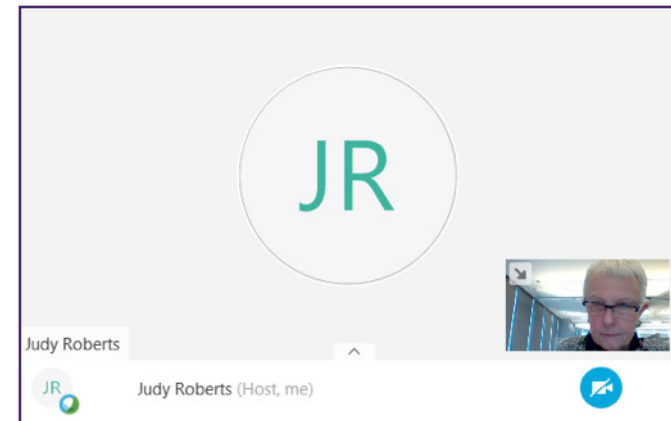
Recording a Meeting.

Push the **Recorder** button in the top navigation bar; it will turn blue and this menu will appear at the bottom of the screen.

Press the circle; you will then get a message saying that the connection is being made to the server and a small red circle will appear in the lower left of the meeting screen. Icons enabling a host to pause and stop the recording will appear in the image above. Both audio and video are recorded.

> **Tip:** You must use menu to record an audio-only conference even though you do not use any other WebEx meeting feature.

When the recording stops, an email link to the recording (which is in MP4 format) is sent to the host, who can forward the message to all/selected participants and/or post the recording internally on a suitable central location.

> **Note:** If a host chooses to record the session on his/her own computer, then s/he must manage the quality, distribution and other steps.

Technical Support

For technical support, please call **1-877-944-6338** or push ***0** if you are on the WebEx audio bridge.

> **Tip:** *0 will not work if **Computer for Audio** is selected.

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