WebEx Instructions
WebEx Help Guide Sections

Instructions for SCHEDULING a WebEx Meeting

INCLUDES
• Schedule a meeting
• Edit a meeting
• Cancel a meeting
• Changing preferences

VIEWING
• As a Presentation
  • Click box above

• As a Hard Copy
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Instructions for HOSTING a WebEx Meeting

INCLUDES
• Starting the meeting
• Sharing your screen
• Managing the meeting/audio
• Changing roles

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Instructions for ATTENDING a WebEx Meeting

INCLUDES
• Signing in to the meeting
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Need additional support? Contact Cisco at 866-229-3239.
SCHEDULING

Instructions for HOSTING a WebEx Meeting

Instructions for ATTENDING a WebEx Meeting
Schedule a WebEx Meeting – NOT for UCNI

1. Go to msts.webex.com
2. Log in to WebEx
3. Click “Schedule”
4. Chose the Meeting Type
5. Enter meeting topic
6. Adjust the day and time
7. Check “Recurrence” if this will be a recurring meeting.
8. Do NOT add Attendees
10. Set “Guest can join the meeting” option.
11. Click “Start/Schedule”
12. Copy this information or copy from the email you should have received.

13. You will need the host key for the meeting.

14. Send an Outlook Meeting Invite to all attendees with the meeting information pasted in.
1. Go to msts.webex.com
2. Log in to WebEx
3. Click “Schedule”
4. Choose the Meeting Type
5. Enter meeting topic
6. Adjust the day and time
7. Check "Recurrence" if this will be a recurring meeting.
8. Do NOT add Attendees
9. Choose "Use VOIP Only" to allow audio via the computer.
10. Set “Guests wait in the Lobby until the host admits them” option. This is a required selection for any UCNI level discussion.

11. Click “Start/Schedule”
12. Copy this information or copy from the email you should have received.
13. You will need the host key for the meeting.
14. Send an Outlook Meeting Invite to all attendees with the meeting information pasted in.
Edit a WebEx Meeting

1. Click “Meetings”
2. Click on the meeting you want to edit.
3. Click the "Pencil"
Edit a WebEx Meeting

4. Select this meeting or entire series.
5. Click “OK”
6. Make edits.
7. Click “Save”
Cancel a WebEx Meeting

1. Perform steps 1 & 2 from editing a meeting
2. Select the meeting
3. Select the “trash can” icon
4. Select to cancel this meeting or the series
5. Select Okay
1. Click on Preferences

2. Click on Scheduling

3. Choose the NOT for UCNI meeting type.
Setting Preferences

4. Click “Schedule”
5. Choose the Meeting Type
6. Enter meeting topic
7. Adjust the day and time
8. Check “Recurrence” if this will be a recurring meeting.
9. Do NOT add Attendees
10. Choose “Webex Audio” to allow call-in/back function.
### Setting Preferences

<table>
<thead>
<tr>
<th>Setting</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exclude password</td>
<td>□ Exclude password from email invitation</td>
</tr>
<tr>
<td>Breakout sessions</td>
<td>□ Enable breakout sessions</td>
</tr>
<tr>
<td>Unlocked meetings</td>
<td>Everyone in your organization can always join unlocked meetings.</td>
</tr>
<tr>
<td></td>
<td>When the meeting is unlocked,</td>
</tr>
<tr>
<td></td>
<td>□ Guests can join the meeting</td>
</tr>
<tr>
<td></td>
<td>□ Guests wait in the lobby until the host admits them</td>
</tr>
<tr>
<td></td>
<td>□ Guests can’t join the meeting</td>
</tr>
<tr>
<td>Automatic lock</td>
<td>□ Automatically lock my meeting [0] minutes after the meeting starts.</td>
</tr>
<tr>
<td>Registration</td>
<td>□ None</td>
</tr>
<tr>
<td></td>
<td>□ Require attendee registration</td>
</tr>
<tr>
<td>Email reminder</td>
<td>□ 15 minutes before meeting starts</td>
</tr>
<tr>
<td>Meeting options</td>
<td>Edit meeting options</td>
</tr>
<tr>
<td>Attendee privileges</td>
<td>Edit attendee privileges</td>
</tr>
</tbody>
</table>

10. Set “Guest can join the meeting” option.
11. Click “Save as template”
HOSTING

Instructions for SCHEDULING a WebEx Meeting

Instructions for ATTENDING a WebEx Meeting
**Starting a WebEx**

**Before the meeting starts** ensure your computer/laptop is muted and your web cam is turned off. This means the device itself, not just your VDI.

1. Click “Start/Join Meeting”
Starting a WebEx

Follow steps to download WebEx Desktop Application or skip to next slide if already downloaded.

2. Once download begins click “Save”
3. Click “Open”

Install the Cisco Webex Meetings app and start collaborating.
Starting a WebEx

Follow steps if you already have WebEx Desktop Application downloaded.

2. Click “Open Cisco WebEx Meeting”
3. Or click “open the desktop app”
Starting a WebEx

4. Turn your video off or on, depending on your capabilities and location.
5. Click the audio arrow.
Starting a WebEx

6. Select your audio preference:
   A. Only select this option if you have a high quality headset or are in a Meeting FOR UCNI, PII, and/or PHI. Do not use your PC mic and speakers.
   B. PREFERRED choice. Enter your phone number.
   C. Alternate Choice.
   D. Do not use this option unless you are not listening or speaking. Calling in separately and clicking this option uses two licenses.

NOTE: WebEx will save your audio preferences. After joining your first meeting, it should continue to select your chosen audio for you.
Starting a WebEx

7. Click “Start Meeting”
8. WebEx will call you.

NOTE: The host has to be present for the meeting to occur.
9. Click here to share your screen or a specific document or program.
Starting a WebEx

10. If sharing multiple documents, we recommend sharing your screen to allow for easy switching between programs/documents.

11. If sharing one document only, you may select just the open program.

NOTES: The application or document must already be open before clicking share if you only want to share one document. Anything besides the selected program will appear to be a black or grey box for participants.

Also, sharing your screen will allow participants to see everything on your screen.
Starting a WebEx

12. Attendees will appear on the side bar.
13. Right click on individuals to change their permission.

NOTE: Individuals’ names will only appear here if they have an account or they update it when signing in.
Starting a WebEx

14. Click here to chat with the group.
15. Click the “Participant” drop down for additional meeting settings.
16. Enjoy your meeting!
17. Click X to end the meeting.
Managing Audio

- As users talk during the meeting, it will be indicated with blue waves next to their name.
- This can help identify who is not muted in a meeting.
Managing Audio

• Users who join by phone and then WebEx will show up twice on your attendee list.
• Only one account should connect with audio.
• Encourage all attendees to join on WebEx and then have WebEx call them for the best audio quality.

NOTE: Major audio issues may occur if someone uses their computer and their phone for audio.
• To identify users who join by the phone, only you can rename them once you have determined who they are.
• Right click on their name and select rename.
Managing Audio

- Joining WebEx and then having WebEx call you will appear like this.
- Only calling in looks like this.
- Calling in and then connecting with audio will result in two listings for the same user.
Managing Audio

• Prior to the meeting, mute all users on entry to prevent any audio.
• Anyone who needs to speak can unmute themselves.
Managing Audio

- During a large meeting it may be difficult to determine where feedback is coming from.
- You can pin your speakers here.
- When an audio issue occurs, quickly mute all and then unmute your speaker.

NOTE: For a successful meeting, one individual should manage the audio while another shares any slides.
Changing Roles: For Original Host

Before the meeting starts, start the meeting and have the future host or presenter join the meeting for testing.

1. Right click on the individual you would like to be the new host or presenter.
2. Click “Change Role To”
3. Click “Presenter” or “Host”

NOTE: Selecting “Presenter” will give them the power to present only. Selecting “Host” gives them full control of the meeting and you can leave the meeting if needed.
Changing Roles: For New Presenter

1. You will get a pop up that reads “You are now the Presenter.”
2. Under your name in the participant list, it will say “me, Presenter.”
3. You will have the ability to present.
Changing Roles: For New Host

1. When you are made the host, there is no major notification.
2. In the participant list under your name, it will say “me, Host.”
3. You will have full control over the meeting.

NOTE: Ensure that you can present and all controls work before the original host leaves the meeting.
ATTENDING

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Attending a WebEx

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Attending a WebEx

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Install the Cisco Webex Meetings app and start collaborating.
Attending a WebEx

Follow steps if you already have WebEx Desktop Application downloaded.

2. Click “Open Cisco WebEx Meeting”
3. Or click “open the desktop app”
4. Turn your video off.
5. Click the audio arrow.
Attending a WebEx

6. Click “Call me at”
7. Enter your phone number.

NOTE: If this is a Meeting FOR UCNI, PII, and PHI then the “Use computer for Audio” will be the ONLY available option.
8. Click “Start Meeting”
9. WebEx will call you.

NOTE: The host must be present for the meeting to start.
Attending a WebEx

10. Screen share will appear here.
11. Attendees will appear here.
12. Enjoy your meeting!

Don’t forget to mute your phone when you’re not talking!
If you require additional support, please contact Cisco at 866-229-3239.

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