WebEx Fundamentals
User Guide

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Table of Contents
Account Initial Setup ....................................................................................................................... 4
Accessing KSU WebEx ..................................................................................................................... 5
WebEx Meeting Center ................................................................................................................... 6
Hosting Meetings ............................................................................................................................ 6
  Schedule a Meeting ..................................................................................................................... 6
  Quick Scheduler ........................................................................................................................ 7
  Advanced Scheduler ................................................................................................................ 9
Start a Meeting ............................................................................................................................. 19
  Instant Meetings ....................................................................................................................... 20
  Meet Now .................................................................................................................................. 20
**Account Initial Setup**

Before using WebEx Meeting, an account must be created to allow a Host to initiate the meeting. To have an account created, a Help Desk ticket must be opened at [support.kent.edu](http://support.kent.edu). The support team will contact WebEx to request an account.

An e-mail from the Kent State University Technical Support department will confirm the new account and deliver your WebEx Account ID Username, and provide a “Password” link. Click the link to open an internet browser and go to the site kent.webex.com where a password must be created for the User ID provided.

The WebEx account is now active and may be used to host meetings.

Once an account is established, meetings can be scheduled or started by accessing the WebEx server for Kent State University, and using the various tools in the application to communicate with others at the university.
Accessing KSU WebEx

WebEx at Kent State University can be accessed from a web browser using the address:

https://kent.webex.com

Clicking the Login button in the top, tight corner of the screen allows you to enter your account credentials and launch the application.

Enter your Username and Password, and select the Log In button to be directed to the WebEx Meeting Center for your account at Kent State University.
WebEx Meeting Center

The Meeting Center is most commonly used section in WebEx. It allows users to easily access the items to initiate meetings through the service. A menu on the left of the screen offers access to the many actions you may need to perform.

The most frequently used items are in the Host a Meeting section. The items in this section allow you to Schedule a meeting for a future date, start scheduled meetings and instant meetings, and review previously recorded meetings.

Hosting Meetings

Many times meetings can be scheduled in advance, using the Schedule a Meeting section, and attendees invited via email. These one-time meetings can be easily scheduled and invitations created to notify the attendees of the date and time, and how to access the electronic meeting. If the same meeting is held on a continued basis, these regular meetings can be scheduled using the Advanced Scheduler to allow for consistent meeting information. If an ad hoc meeting is needed, the Meet Now and My Personal Room options allow users to instantly create a meeting venue and immediately invite others to attend.

Schedule a Meeting

If a meeting is to be planned ahead of time, it can be scheduled, with invitations sent to those who should attend, offering advance notice and instructions on how to enter the electronic meeting, and sending any meeting documents through email.

The WebEx Quick Scheduler screen allows a host to enter the appropriate information for the meeting into a template. If changes to the template are made the updated form may be saved as a personal template to be used in the future.

Additionally, an Advanced Scheduler is available to walk users through a scheduling wizard to plan the meeting. This will display the detailed options for event creation.
Quick Scheduler

To schedule a meeting using the basic scheduling page, the following two steps can be taken to Plan the Event and Invite Attendees.

1. Fill in the data needed for the necessary meeting details.
2. Forward the information to the suggested attendees

Plan the Event
- Type the meeting name (topic)
- Create and confirm a password for the meeting if desired. A password is not required.
  - (This is optional and not recommended)
- Specify the date, time, of the meeting
- Note the expected length of time for the meeting (duration.)
- Enter the attendees email addresses if they are readily available.
  - (It is often easier to include attendees in Microsoft Outlook in a later step)
- Check the “Send a copy of the invitation email to me” button
- Select the Audio type
- Click the Schedule a Meeting button to plan the meeting

With the event created successfully, a confirmation screen appears, verifying the information and giving the option to Add to My Calendar.
Invite Attendees
A WebEx meeting invitation will be sent to the meeting scheduler that may be forwarded to participants through KSU email, as a meeting invitation, which allows the use of the KSU Contact Lists to locate and include invitees.

The meeting details may be viewed and edited from the My Meetings list in WebEx. If the event was added to a personal calendar, it may also be viewed as an appointment in the computer calendar application.
Advanced Scheduler

Selecting the Advanced Scheduler walks step by step through the various options of creating a WebEx event, separating the information needed into multiple sections based on the Meeting type selected in step one.

Required Information

**Meeting Type**: the drop down selector is used to choose the meeting type and view the steps included in each.

### Meeting Center Pro

1. Required Information
2. Date & Time
3. Audio Conference
4. Invite Attendees
5. Registration
6. Agenda & Welcome
7. Meeting Options
8. Attendee Privileges
9. Review

### WebEx Personal Conference

1. Required Information
2. Date & Time
3. Audio Conference
4. Invite Attendees
**Meeting Topic:** A name or description of the meeting is entered.

**Meeting Password:** A password may be created to secure the meeting to only those who have been invited and have been given the password. This feature is rarely used and it is not recommended.

**Save as Template:** The selections may be saved as a template for future use in the Quick Scheduler or Advanced Scheduler. The template will be available in the dropdown in the top, right corner from any stage in the scheduler. Next: Clicking the Next button saves the selection and navigates to the next page in the selected scheduler.
Meeting Date: The date of the event is entered.

Meeting Time: The time of the event is entered, changing time zones if necessary.
- Mark the check box and choose from the drop down to select when attendees can join the call.
- Mark the checkbox to allow attendees to connect to the Audio portion of the conference as well.

Estimated Duration: The estimated length of time of the meeting is entered.

Email Reminder: An optional email message can be sent to attendees to remind them of the event. If no message is to be sent, None can be chosen from the dropdown list.

Recurrence: Recurring events can be scheduled using the radio dial button selections.
When the option of Daily, Weekly, Monthly, or Yearly is selected, additional details regarding the recurrence may be entered.
Audio Conference Settings

Select Conference Type: From the dropdown, the audio type that attendees can use to call in is selected.

- **WebEx Audio**: Attendees connect to audio portion using telephone or computer.
- **Use VoIP only**: Attendees can only connect via computer.
- **None**: Attendees listen only.

Entry and Exit Tone: From the dropdown, what, if any, notification to be presented when an attendee joins or leaves the meeting is chosen.

- **Beep**: a tone is heard
- **Announce Name**: the attendees name is stated
- **No Tone**: no sound is made
Invite Attendees
Attendees may be added to the meeting, the same ways as with the Quick Scheduler, by adding email addresses in the Attendees box. It is often easier, however, to select the check box for the option to “Send a copy of the invitation email to me”, and forward the invitation in order to use the KSU directory in Kent State University email.

Attendees: Email addresses of attendees can be entered.

Select Attendees: This link allows the event creator to add attendees or additional Hosts from their WebEx Contact List. As stated earlier, using the KSU email contact list is recommended for adding invitees.

Send a copy of the Invitation to Me: allows the event creator to receive a copy of the invitation to forward to invitees.

Security: If a password is being used, the meeting creator could opt to withhold it form the invitation email by using the checkbox as such. The option to “Require attendees to have an account on this Website” is not applicable at Kent State University.
Registration
In rare instances, registration is desired for an event. For this option, a password must be created and attendees must register. This feature is not widely used at KSU.
**Agenda & Customizable Welcome**

**Agenda:** A meeting agenda may be typed in the entry field.

**Info tab Templates:** Only the Default tab is available.

**Documents:** Documents may be added for use in the meeting, though they will need converted to a file with a “*.ucf” document type to be used in WebEx. Thus, it is simpler to attach any documents to the KSU email message when sending the invitation.
Meeting Options
There are many options that you, as the Host, can decide whether or not the attendees can access and utilize.

Chat: This allows attendees to type questions and input to the meeting.

Video: to select if attendees can view video, and what quality, in addition to video thumbnails.

Notes: To choose if any or all attendees are able to take notes via WebEx and save them to their computer.

Enable Closes Captioning: To allow the closed captionist to transcribe notes during the meeting.

File Transfer: To allow the presenter to publish files that attendees can download during the meeting.

Enable UCF media: to allow attendees to share Universal Communications Format (ucf) media files. *Sharing files in email with the invitations is easier.*
Attendee Privileges
Decide what actions attendees can access during the meeting.

Click the selected check boxes to allow attendees to perform certain actions during the event.
Review
The **Review** screen allows the event creator a chance to view the selected meeting options before scheduling the meeting.

Click a number on the right side to change any of the specified information or settings.

Click the **Schedule Meeting** button to accept the information and display the notification that the meeting has been scheduled.

Several options are available from this page including links to **Edit**, **Cancel Meeting**, and **Add to My Calendar**, as well as a button to **Start** the meeting.
Start a Meeting
As the meeting host, you are tasked with starting the meeting. With the meeting number and Host ID you can begin the event in a few different ways.

Hi, John Smith,

You are the host for this WebEx meeting.
Host key: 322578 (Use this to reclaim host privileges.)

Test
Tuesday, March 7, 2017
6:00 pm  |  Eastern Standard Time (New York, GMT-05:00)  |  1 hr

Join WebEx meeting
Meeting number: 715 433 662

Join by phone
1-850-479-3208 Call-in toll number (US/Canada)
Access code: 715 433 662
Instant Meetings

Meet Now

Clicking the **Meet Now** link in the Host a Meeting menu allows you to immediately start a meeting without having to schedule it in advance. Selecting the link opens a meeting with all of the standard features.

With a meeting started, the host can choose call in options, screen sharing, and can invite others to join the meeting.
Call In Options

Clicking the ellipses button in the call in options pane will reveal more options to connect to the audio portion of the meeting. As host, options will be available to use the telephone or computer for audio, based upon selections made in the Meeting Center menu through the Set Up options, under Preferences.

Share Screen

Participants see their Quick Start screen until you as host select the Share Desktop icon. Participants will then see

*Whatever is shown on your screen!*

** Make sure only items you want to display are open on your computer.

When in desktop sharing mode, WebEx controls reduce to a pop-down panel at the top of the screen. Rolling the mouse up to the top edge to make the panel appear. All of the WebEx controls may be accessed via this panel.
Invite & Remind
Several methods are available to invite others to join the WebEx meeting. The most convenient at Kent State University may be to, again, use the “Forward To Others” Email that will automatically be sent to the Host. The **Invite & Remind** button also allows the Host to add people to the WebEx meeting in a couple of different ways.

Clicking the **Copy Meeting URL** button at the bottom of the **Invite & Remind** pane adds the meeting link to the computer clipboard and may be pasted in electronic communication for others to use to join the meeting.

Clicking on the top portion of the **Invite & Remind** pane offers fields to enter the email addresses, or text messages, to invite attendees. This information will have to be entered individually or selected from the **My Contacts** list by the host, if it has been set up.

Additionally, if the meeting was set up previously, a **remind** option is available to send a message to those who have already been invited to the meeting.
End a meeting

When the meeting is finished, the host can end the WebEx with a couple of quick steps. First, the screen sharing should be stopped by clicking the red \textit{Stop Sharing} button located in the WebEx control drop-down at the top of the screen. This will cause the \textbf{Quick Start} tab to reappear, from which the meeting can be ended.

Clicking the \textbf{End Meeting} button, will display a confirmation pane to verify the meeting is to end. (The button may say \textbf{Leave Meeting}, which also works.)

Alternately, the meeting can be ended through the WebEx \textbf{File} menu, and selecting \textbf{End Meeting}.

\textit{For help with and more information about using WebEx, visit support.kent.edu and search for ‘WebEx’}. 