NIH Center for Information Technology

Getting Started Guide for
# WebEx Hosts and Presenters

Scheduling a Meeting in Outlook

First, install the [WebEx Productivity Tools](). Then you can schedule your online Meeting using Outlook just like you schedule an in-person appointment.

### To schedule a meeting using Outlook:

1. Open Microsoft Outlook.

2. Click the **Schedule Meeting** button in the Home tab of the Outlook toolbar.

3. Specify meeting attendees using their email address, your Outlook Address Book or the Global Address List (GAL).

4. Add a Meeting **Subject** and **Location** (Optional).

5. Set the Meeting's **Start and End** time.

Note: If you have scheduled dedicated meeting support, add **Web Meeting** as an email recipient. This will allow you to specify the Web Meeting team as an alternate host.
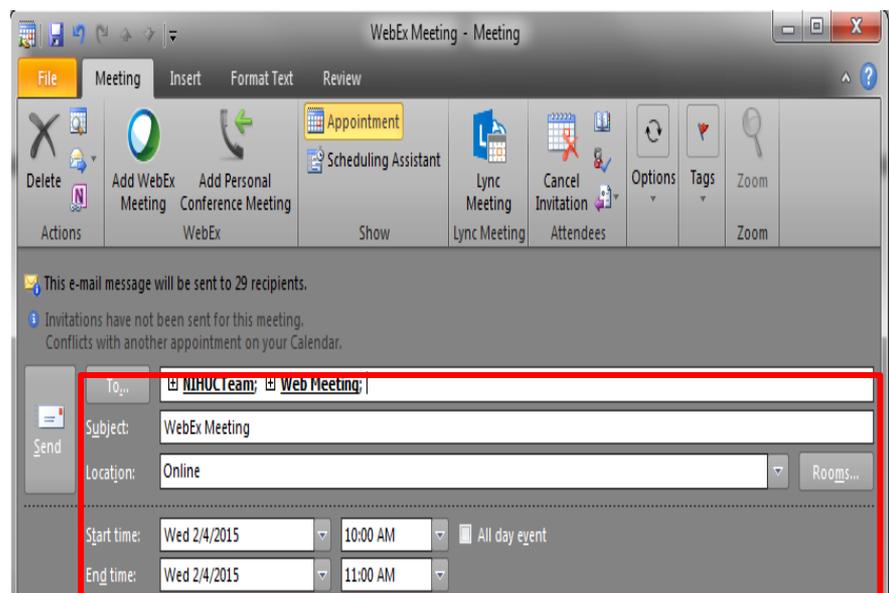
6. Click the **Add WebEx Meeting** button in the toolbar of your meeting scheduling window.

7. The WebEx Settings window will appear.
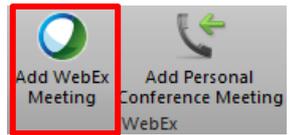
8. Specify the **Meeting Password**.

<u>Note</u>: The password must be at least four characters.

9. Under the **Audio & Tracking** tab select the type of teleconference you would like to use.

10. Select the **Registration** tab in order to require attendee registration. (Optional)

<u>Note</u>: If you have scheduled dedicated meeting support, add the Web Meeting team as an **Alternate host** by selecting the **Resources** tab and clicking the checkbox next to **Web Meeting**.
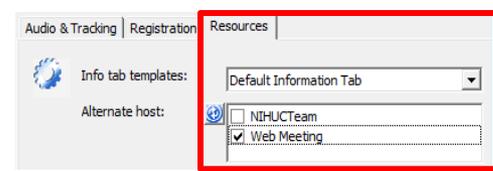
11. Click (💾) from the Quick Access Toolbar to add the WebEx Meeting to the body of the email.
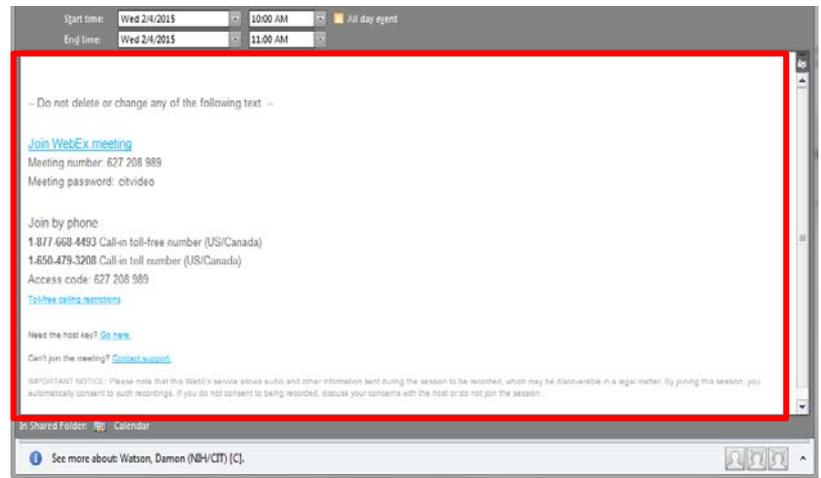
12. Click **Send** to schedule your meeting.
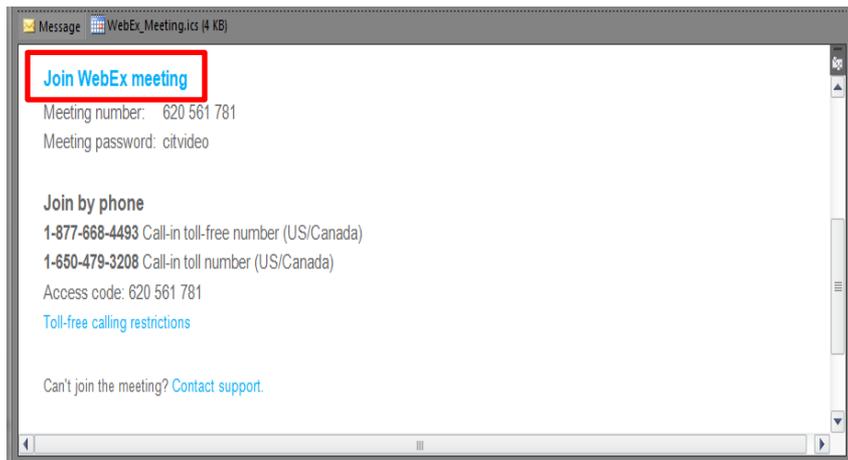
Start a Scheduled Meeting

When you schedule a WebEx meeting in Outlook, an invitation is added to your calendar. The invite includes a link that you can use to start your WebEx meeting.

To start a scheduled meeting:

1. Double-click the meeting entry from your Outlook calendar.
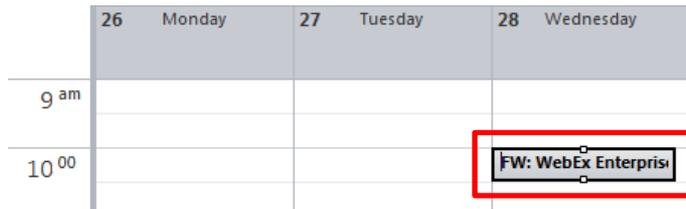
2. Click the **Join WebEx meeting** link from within the calendar invite.

3. Your WebEx meeting will now start. As the Host, click the "If you are the host, start your meeting" link below the Your Name and Email fields to start your meeting.

Start an Instant Meeting

A One-Click (or Meet Now) meeting is an instant meeting that you can start at any time, without having to schedule the meeting in advance.

To start an instant meeting:

1. From the Outlook Home tab, select the One-Click Meeting (or Meet Now) icon.

2. Your WebEx meeting will start.
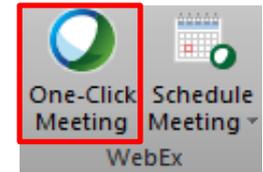
Personal Meeting Rooms

As a Host logging in for the first time, you will receive an introduction to your Personal Room. Each room has an identifier (called a URI) that's as unique as your phone number. Meeting instantly or scheduling a meeting is as simple as giving out your personal ID.

To access your Personal Room:

1. Go to https://nih.webex.com

2. Log in with your NIH username and password.

3. Select the **Meeting Center** tab from the top menu bar.

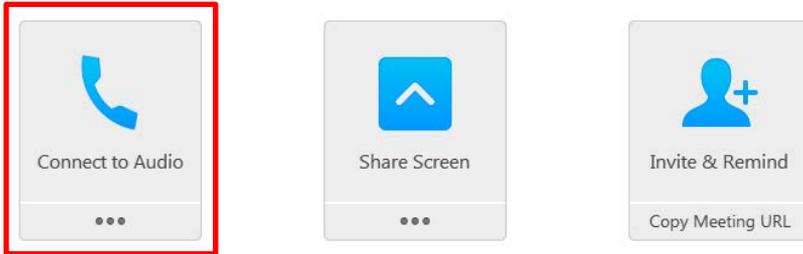4. Click the **Enter Room** button to access your Personal Meeting Room.
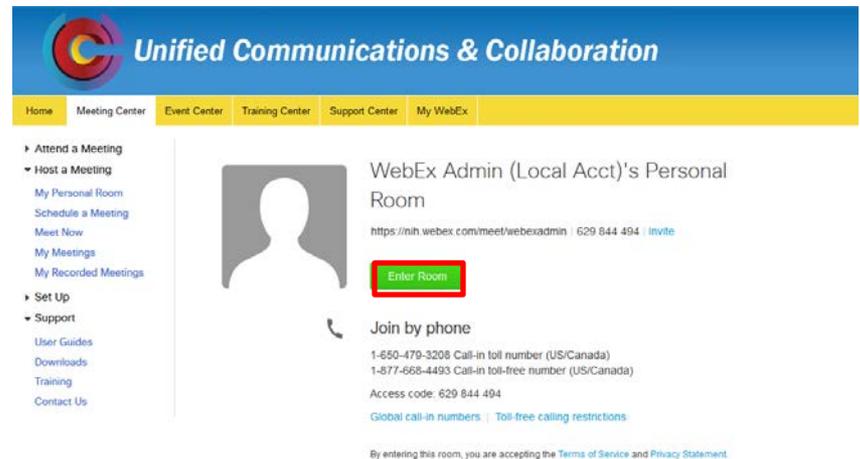
Start the Audio Conference

After you start the meeting, you will need to connect to the audio conference with a telephone or with a computer using [Integrated VoIP](#) (Voice over Internet Protocol).

To connect to the meeting audio:

1. Click the Connect to Audio button.

2. Select one of the following audio options:

Select audio option...	Then...
Call Me	1. Select the check box **Remember phone number on this computer** if you would like to store this number for future meetings. 2. Click **Call Me**. *You will receive a call and may be prompted to press 1 to connect.*
I Will Call In	1. Dial the phone number listed, enter the meeting access code, and enter the attendee ID #. 2. Close the window.
Call Using Computer	1. Click **Call Using Computer**. *You are connected to the audio conference.* 2. Adjust your speaker and microphone settings as needed.

Share Content

As a Presenter, you can access options for sharing content during your meeting from the **Share** menu or from the sharing panel located on the Quick Start tab.
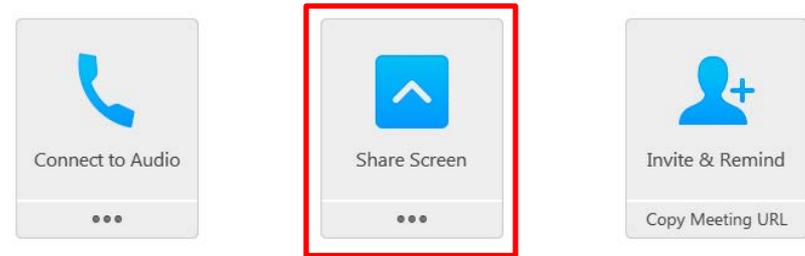

To share content during the meeting:

Select...	To share...
My Screen	Your computer's desktop. *All open applications and icons on your desktop are visible to other participants.*
File (including Video)...	An open file on your computer in the Content Viewer. Use this option to share a presentation, such as a PowerPoint file or a Word document.
Application	An application on your computer. *Meeting attendees can view the application, even if not installed on their computers.*
Whiteboard	A whiteboard and annotation tools. You must grant annotation privileges to other participants to give them access to the tools.
Web Content	A website that attendees can navigate in the Content Viewer. For example, you can use this option to let participants fill out a form individually.
Web Browser	A website that you can navigate while attendees watch you.
My Meeting Window	Your host view of the entire meeting window. Close any private chat conversations before sharing your meeting window.

Navigate the Meeting Window

As a meeting Host, your responsibilities include overall management of the meeting.

The meeting window provides a forum for you to manage all aspects of the meeting and enable participants to chat, send video, share information, and interact with each other via documents, presentations, whiteboards, applications, and more.
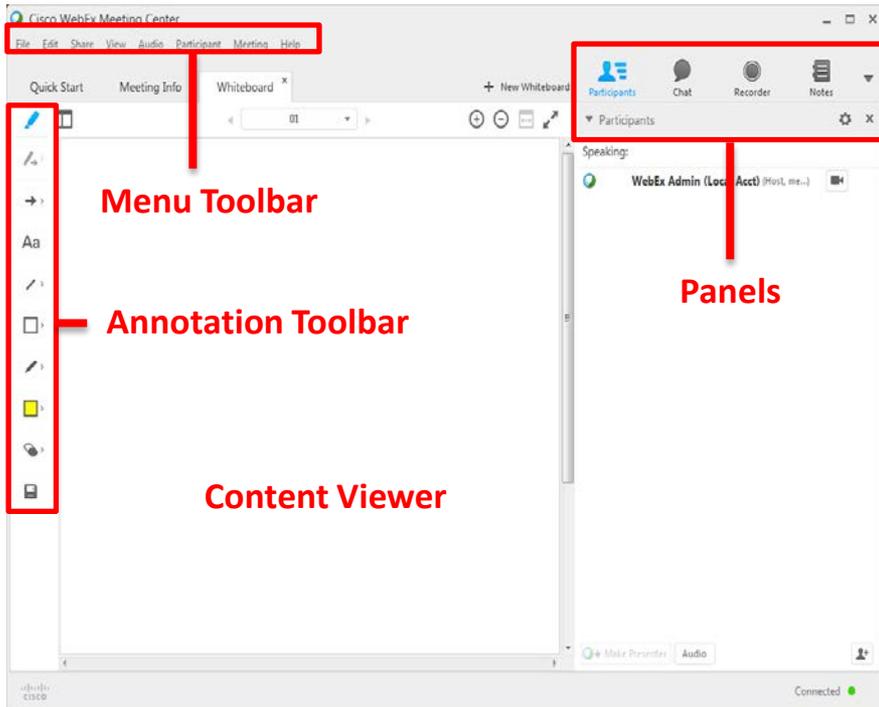
- **Content Viewer**: Displays presentations, documents, video files, whiteboards, and Web content.
- **Panels bar**: Provides areas for chat, polling, Q&A, names of participants, and the recorder.
- **Menu Toolbar**: Allows access to Meeting Center tools and functions.
- **Annotation Toolbar**: Lets participants annotate files and whiteboards shared during a meeting.

Using the Participants Panel

Icons in and below the Participants panel let you control your audio and video, as well as interact with the Host, Presenters, and Participants. You can also access additional functions by left-clicking a panel with your mouse.

From the Participants panel:

Click this...	To do this...
	Start/stop sending your video.
	Mute/unmute your audio.
	Switch to full-screen video.

**On the icon bar beneath the Participants panel:**

Click this...	To do this...
Make Presenter	Make the selected participant the presenter.
Raise Hand	Raise/lower your hand.
Audio	Control your audio connection.
	Change how participants appear on your screen (List or Video view).
	Set the video options from your computer.
	Invite and remind others to join (available to the Host only).

Changing Presenters

During a meeting, you can make any meeting participant the Presenter – this is also referred to as *passing the ball.* Any Presenter can also pass the ball to make another meeting participant the Presenter. As a meeting host, you can make a participant the Presenter *before sharing* or *during sharing.*
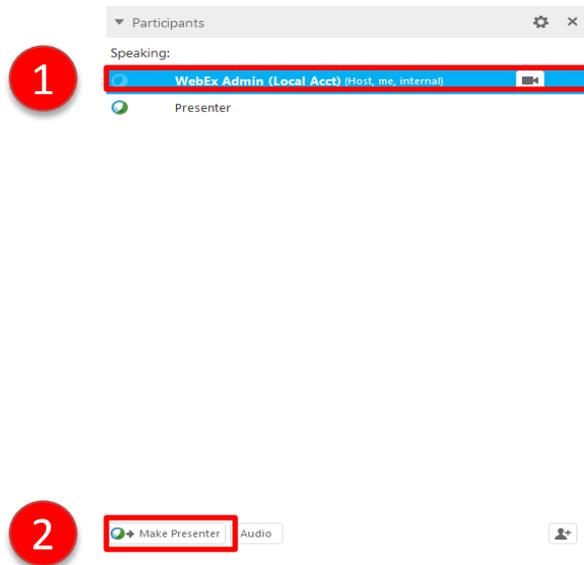
To make another participant the Presenter:

Drag the ball to the next presenter.
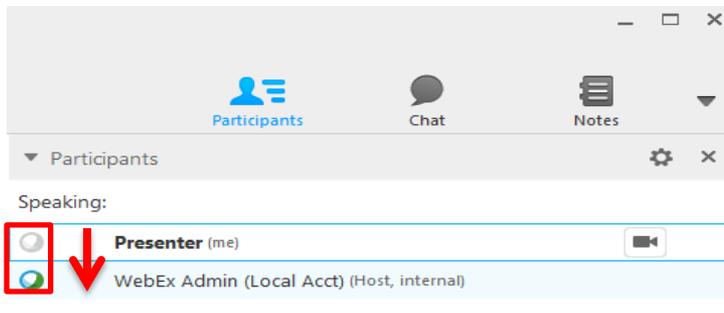
- OR -

Choose a name from the Participants list and select the **Make Presenter** button.

Transfer the Host role

As a meeting host, you can transfer the Host role – and thus control of the meeting – to a participant at any time. This option can be useful if you need to leave a meeting for any reason.

To make another participant the Host:

1. Right-click on a participant name or thumbnail.
2. Select the **Participant** menu.
3. Select **Host** from the **Change Role To** menu.
4. The word **(Host)** appears to the right of the attendee's name in the participant list.
5. The selected participant is now the host.

Note: If you plan to reclaim the Host role at a later time, write down the host key that appears on the Info tab in the Content Viewer.
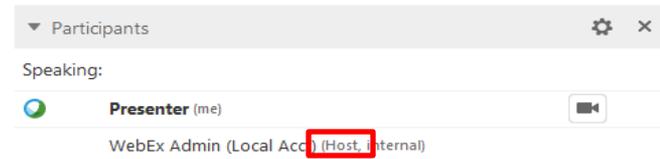
Reclaim the Host role

If a participant has control of a meeting, you can assume control of the meeting by reclaiming the Host role.

To reclaim the Host role:

1. In the participant list, select your own name.
2. From the menu, select the **Participant** drop-down menu and choose **Reclaim Host Role**. The Reclaim Host Role dialog box appears.
3. Type the host key in the Host key box.
4. Click **OK.**
5. In the participant list, the word (Host) appears to the right of your name.

Note: If you did not write down the host key before transferring the Host role to another participant, you can ask the current Host to send you the host key in a private chat message.

Using Video

Participants with a webcam can share and view their video during a meeting.

To start and stop your video:

Click the camera icon ( ) in the Participants panel. The icon turns green, and your video feed appears at the top of the Participants panel. Click the camera icon again to stop your video.

Video options

You can control video settings, as well as switch between cameras connected to your computer, by clicking the Set Video Options icon ( ) beneath the Participants panel.

Video view and list view

To see the thumbnail images of other participants video, select the **Video Thumbnails** icon by moving your mouse over the Participants panel.

Full screen mode

You can expand the video image to full-screen mode by clicking the active speaker icon ( ) on the Participants panel. To leave full-screen mode, click **Exit Full-Screen View**. To end your video while in full-screen mode, click **Stop My Video**.
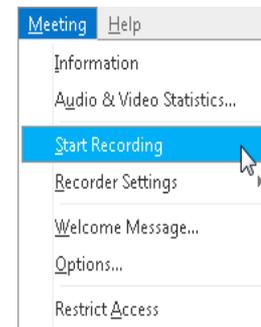

Recording your meeting

The Network-Based Recorder captures screen activity and audio using the WebEx recording server. The server processes your recorded data, and then sends the recording file to your personal recordings folder on the NIH WebEx site. Recorded files are saved in the Advanced Recording Format (.arf), a proprietary WebEx format.

To use the recorder:

1. Start your meeting.

2. If the Quick Start page is displayed, click **Record**. Or, on the **Meeting** menu, select **Start Recording**.

3. Once a connection is established, the Recorder panel opens and recording begins.

4. Click the **Pause** button ( ) when you want to stop recording briefly, and click it again to re-start.

5. Click the **Stop** button ( ) to end the recording completely. *You are prompted to confirm that you want to stop recording.*

6. After your meeting is complete, log in to nih.webex.com and select **My WebEx > My Files > My Recordings** to access your recording.

Watch the How to record a meeting video to learn more.