This user guide is meant to provide you with information about all of the tools that are available and may be used during your committee meetings. If you would like to learn more about how to conduct effective meetings, please see our Member Training Page for upcoming training sessions.
Committees may require Webex registration, so be sure to read the Webex meeting notices carefully. If your committee uses Webex registration, you will receive an invitation email as shown. Register by clicking the button in the email. We recommend registering in advance of the meeting so that there are no delays accessing the meeting.
CHAPTER 1 GUIDANCE FOR WEBEX PARTICIPANTS

Registering for a Webex Meeting

On the Registration page, complete all required fields that are noted with a red asterisk.
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Registering for a Webex Meeting

Once you’ve clicked Register Now, you should see a confirmation page.

Note: Check your email on registration; you will receive an additional email notification with the access link to the Webex meeting. This is the link you will need to login and attend the meeting.
Registering for a Webex Meeting

Add to Calendar: Take advantage of the Add Meeting to Calendar link in the email. Using this option will add all of the meeting details, with access links, to your email client so that it will be easier to locate on the day of the meeting. Be sure to save this information to connect to the Webex during the actual meeting time.

**Note:** You can share your link with others, but they will also be required to register before they can join the meeting.
Download and Install the Webex Meetings Desktop App

The Webex Meetings desktop app automatically downloads after starting or joining a Webex meeting from a Webex site or email invitation. Click the installation file to install it.

To install the app without joining a meeting first:

1. Download Webex.
2. Under Webex Meetings, select Download for Windows or select the app for other products as needed.
3. Run the .msi (Windows) or .dmg (Mac) installation file and follow the instructions. The Webex Meetings desktop app opens when the installation is complete.
4. Once your download is complete, you’re ready for meeting day. This should make the meeting startup process more efficient. Simply click on your meeting link when it’s time.
CHAPTER 1  GUIDANCE FOR WEBEX PARTICIPANTS

Participant Login for Webex Meeting

Step 1
Click on the Webex link associated with your meeting.

Note: Participants using the Webex app cannot login until the host has started the meeting.
**CHAPTER 1  GUIDANCE FOR WEBEX PARTICIPANTS**

**Participant Login for Webex Meeting**

**Step 2**
Type your name as you would like it to appear to the host and other meeting participants, add your preferred email (this may need to be used if IT issues occur during the presentation), and click Join.
**CHAPTER 1 GUIDANCE FOR WEBEX PARTICIPANTS**

**Participant Login for Webex Meeting**

**Step 3A**
Select your audio preference. You can call in from a land line, have Webex call you at a preferred number, or use computer audio (see Audio Connection Options on page 13), then mute yourself and turn on/off video as desired. When you’re ready, click the green Join Meeting button to go into the meeting.
CHAPTER 1 GUIDANCE FOR WEBEX PARTICIPANTS

Participant Login for Webex Meeting

If you see this message or the one on the next page, please try again in a few minutes as the host may be trying to get the meeting started.
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Participant Login for Webex Meeting
Audio Connection Options

You can connect to the Webex meeting audio on your preferred device. Most feedback/audio interruptions are experienced when multiple users calling in through computer audio are unmuted. See the screenshot for three different options:

1. Use computer audio,
2. Have Webex call you at a preferred number, or
3. Call in using a provided number/participant code.

Tip
If a participant chooses to call in or have Webex call them and does not enter their participant number, their name will appear in the participant box without a phone connection next to it. They will also appear in the participant box as a callin user.
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Webex Meeting Center Controls
If you join the meeting and the host is not yet sharing their screen, the controls will appear in the bottom middle of your screen. Once the host starts sharing, the controls can be accessed from the same location, but you will need to hover your mouse over the shared content for the controls dialogue box to appear.

Audio Connection
The most feedback is experienced when participants use their computer for audio. If possible, have Webex call you back on your preferred device. You will still have all the same viewing and control capabilities as if you had called in from a computer.
Participant Voting Tools, Raise Hand Tool

If the participant box appears on the right side of your screen, hover your mouse over your name and click on the hand icon as shown to raise your hand. The host and presenter will see your hand raised, indicating you would like to speak or have a question. You will need to put your hand down once you are finished, just click again.
CHAPTER 1 GUIDANCE FOR WEBEX PARTICIPANTS

Participant Voting Tools, Raise Hand Tool

If the host is sharing their screen, you may need to access your controls differently. Simply hover your mouse over the screen where it is being shared, and the control panel will appear. Select the participant menu and you can raise your hand from there. You will need to put your hand down once you are finished.
PARTICIPANT VOTING TOOLS, PARTICIPATE IN A POLL

PC/Web View: Response 1

If the host does a poll, you will be prompted to participate. The next few screens show you how this will appear in Webex.
CHAPTER 1 GUIDANCE FOR WEBEX PARTICIPANTS

Participant Voting Tools, Participate in a Poll

PC/Web View: Response 2
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Participant Voting Tools, Participate in a Poll

PC/Web View: Response 3
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Participant Voting Tools, Participate in a Poll

App View: Response 1
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Participant Voting Tools, Participate in a Poll

App View: Response 2
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Participant Voting Tools, Participate in a Poll

App View: Response 3
Participant Note Taking

Participants who would like to take notes but want to keep the screen sharing live can use Notes. This will open a panel to the right under the participant box; there you can type live notes, which can only be seen by the individual participant, and save them in your own files as needed.
Options for Member to Start Meeting Without Host*

*Note:
This can only be done through a web browser and not the Webex app. You must first login as a meeting participant and then follow these steps to claim the host role.
CHAPTER 1 GUIDANCE FOR WEBEX PARTICIPANTS

Options for Member to Start Meeting Without Host

The Host key would need to be provided to others by the host prior to the meeting start.
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Options for Member to Start Meeting Without Host

If the Webex was created through the Outlook meeting calendar add-on, see the location of Host key at right.
CHAPTER 1 GUIDANCE FOR WEBEX PARTICIPANTS

Breakout Sessions

As a participant, you may be part of a meeting where the meeting host/presenter decides to use Breakout sessions.

Once you are in a breakout room, anyone can grab the Webex blue-green “ball” icon and share their screen if needed. The meeting host can end the Breakout sessions at any time and bring you all back to the main room. There will be a minute delay from when they select to end the session and when you are moved back into the main room. This is to help you conclude your conversations.
CHAPTER 1  GUIDANCE FOR WEBEX PARTICIPANTS

Breakout Sessions

To join the Breakout session when it starts, click **Join now** in the message that appears.
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Breakout Sessions

To join the breakout session after it is in progress, go to the Participants panel and click Join.

When you join the breakout session, your audio switches from the main meeting to the breakout session.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

How to Start Your Webex Meeting in Three Steps

Step 1
Click on the meeting link.

Step 2
Select audio connection, turn video on/off, and then click Start Meeting.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

How to Start Your Webex Meeting in Three Steps

Step 3
When you are ready to start sharing content, click on the share screen control (select screen 1 if you want to share whatever is on your desktop or select application if you only want to share one specific document.)

Note: If you plan to switch between files, select Share desktop or Share screen 1.
CHAPTER 2  GUIDANCE FOR WEBEX MEETING LEAD/HOST

Accessing Controls While Hosting

**Step 1**  
Hover your mouse over the 'You’re sharing your screen' button in the top center of screen.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Accessing Controls While Hosting

Step 2
Clicking the You’re sharing your screen button will show a menu; from there, select what you need.

Note: The participant box will cover the screen if you’re sharing.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Mute/Unmute Participants

As the host of the meeting, you can mute/unmute participants. You can do so from the participant box that is either on the right-hand side, or if you’re already sharing, hover over the orange box at the top center of your screen that says, “You’re sharing your screen.” From there, click on participants and then next to each person’s name in order to mute/unmute as shown.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Mute/Unmute Participants

To identify the source of background noise, look for the curved line icon or the green microphone to the right of a participant’s name.
Transfer Presenter Role

To give someone the presenter role, you can simply click and drag the Webex blue-green “ball” as needed to the participant who should be presenting. That person would need to click “share” once they have the presenter role. If you need to take back the presenter role, you can click and drag the Webex “ball” again.

Another option is to right-click on whoever should be the presenter and then click change role. Then, right-click on your own name in the participant box, hover over Change Role To and then click Presenter.
CHAPTER 2  GUIDANCE FOR WEBEX MEETING LEAD/HOST

Presenter Role

Be sure to unmute your system when you are ready to begin presenting/speaking.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Voting Options: Roll Call, Raise Hand Tool, or Polling

Option 1: Roll Call Vote
Use the Webex participant box and a copy of the committee attendance sheet to record votes by person (confirming official votes as you go). Please note this is recommended for groups of 25 or less.

Option 2: Host Polling
To start a poll in Webex, if you do not see “Poll” in the right control panel, you may need to add the poll panel as shown.
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Voting Options: Roll Call, Raise Hand Tool, or Polling

**Option 2: Host Polling**
If host is voting, their vote must be manually added to numbers. Presenters’ votes are included.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Voting Options: Roll Call, Raise Hand Tool, or Polling

**Option 2: Host Polling**
Once the poll panel is open, the host can add questions and answer options as needed.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Voting Options: Roll Call, Raise Hand Tool, or Polling

Option 2: Host Polling
When ready, click Open poll.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Voting Options: Roll Call, Raise Hand Tool, or Polling

Option 2: Host Polling
The host will need to add their own vote manually at the end since they cannot participate in the poll. However, they will be able to see voting results live. The poll will automatically remain open for five minutes but can be closed at any time.
Voting Options: Roll Call, Raise Hand Tool, or Polling

Option 3: Raise Hand Tool
Raise Hand Tool (accessed next to participant name; use control panel instructions on page 15 if unable to locate hand raise feature).

Note: The host cannot raise a hand so their vote would need to be manually added. The presenter does have access to raise hand tool. Only the host and presenter can see raised hands.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Voting Options: Roll Call, Raise Hand Tool, or Polling

A Note about Saving Polls
The host can save the results if needed. By selecting Individual Results, votes can be validated after the meeting to confirm that only official voters participated. To save, click on the download option shown.

Accounting for Proxies
Ideally, all proxies would be submitted via email prior to the start of the meeting (consider assigning a deadline). Depending on what option you choose, roll call voting being the exception, a separate call for proxy voters is recommended. Both the polling function and the hand raise are only calculated once, so if you know you have proxies you call for them (in favor, opposed, abstaining) and add them to your count. Access the Proxy Form.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Breakout Sessions

The meeting host can initiate Breakout Sessions. To access this feature, select the Breakout link from the menu options, and then click Enable Breakout Sessions.
Breakout Sessions

Click the **Breakout Session** icon in the control panel. You can manually move certain participants into each Breakout and add as many breakouts as needed. You also have the option to have the system just break up your participants into groups automatically. When ready, click **Start Breakout Sessions**.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Breakout Sessions

Once the sessions have started, the host can pop in and out of each session or remain in the Main Room. Anyone in the individual Breakouts can grab the WebEx blue-green “ball” icon and share their screen if needed. Once you are ready to end the Breakouts, simply click End all breakout sessions.
CHAPTER 2 GUIDANCE FOR WEBEX MEETING LEAD/HOST

Breakout Sessions

Participants in each room will have one minute to finish their conversation before returning to the original Webex meeting.