

Guide for hosting a WebEx

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We would like to thank

Alison Ure, Project Manager, Keep Well Public Health and
Sandra Barber, Health Improvement Senior NW CHP, NHS GG&C
for sharing their WebEx guide with us.

INTRODUCTION

This guide is not exhaustive however it will give you the basics to getting started with WebEx. Includes some hints, tips or examples of application in pale blue.

What is WebEx?

Webex enables an individual to share their computer (desktop) with others while chatting (speaking/listening) over the phone. It therefore allows you to have a teleconference style meeting and share content (documents, presentations, demo websites, etc.) with others. If you are not sharing any content from your desktop then you may just want to use the teleconferencing system BT MeetMe which comes as part of your webex package.

What do I need to join?

- Access to PC or tablet with internet access
- Telephone positioned close to PC - can use mobile/smart phone.
- The host of the meeting will present documents or website on their computer or laptop
- If possible use a quiet room free of distractions where you can converse freely.
- Give yourself time to set up the meeting, e.g. book room 15-30 minutes in advance of the call and 15-30 mins after the call is due to end in case the meetings runs on, there are questions, etc.

Examples of use

Teams based in differing locations can meet to discuss and progress work, without requiring time to travel to a set location.

Teams (or participants) can discuss and share information on various projects without leaving the workplace. Saves time and ensures they are available for potential emergencies (other day-to-day work activities).

Training can be supported remotely by uploading learning (or educational) content/information and can be discussed via teleconference. This can be achieved on a 1-1 basis or small groups.

New documentation that requires consensus to progress can be viewed by all and contributions discussed to speed up the process of sending around to members and awaiting feedback.

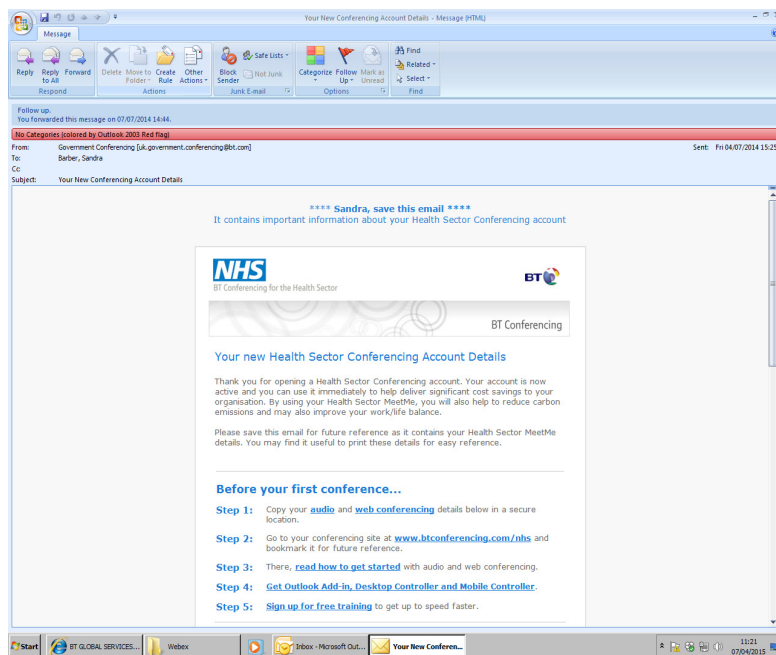
HOW CAN I ACCESS WEBEX

What do I need to host a WebEx meeting?

To host a meeting you require a login.

You need to contact your IT department about the process within your organisation

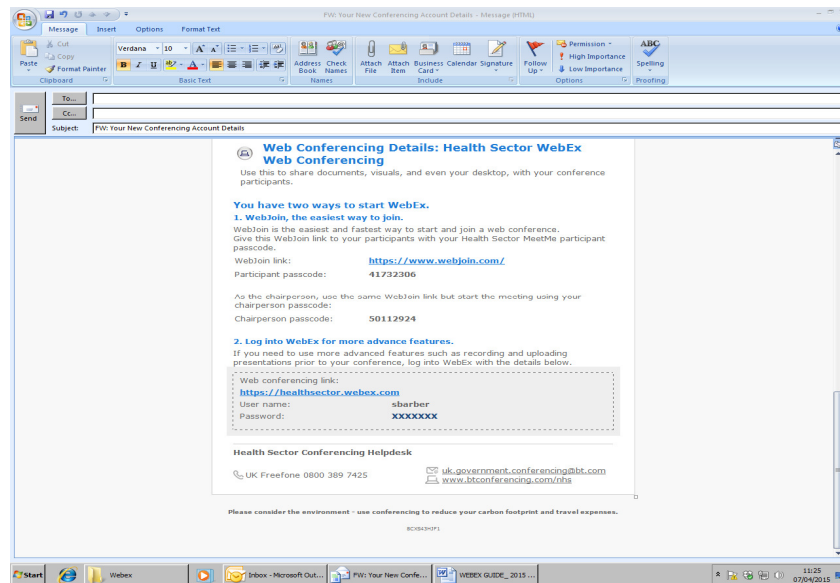
1.



- You will receive an email with your personal login details for hosting a meeting. This can be found near the bottom of the email.

➤ [Save and add to your favourites.](#)

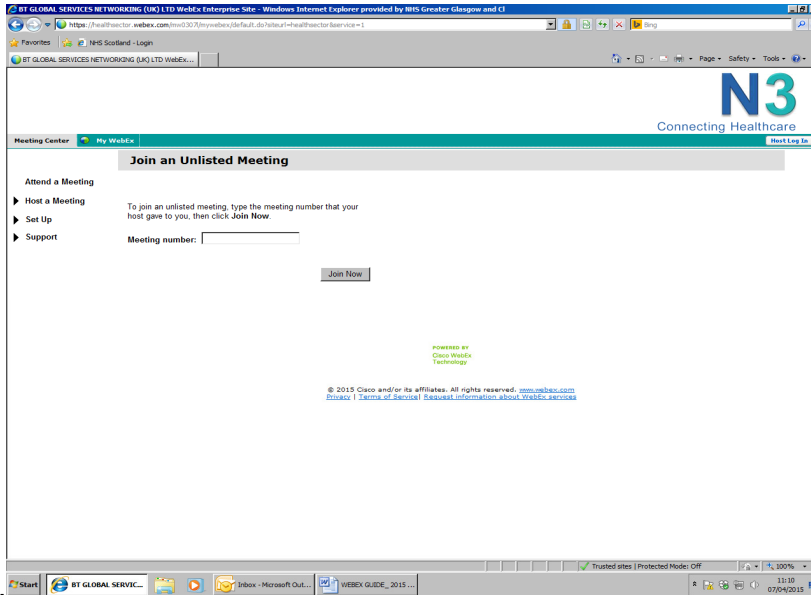
2.



- The following link found in the email will take you to the WebEx pages

➤ <https://healthsector.webex.com/mw03071/mywebex/default.do?siteurl=healthsector&service=1>

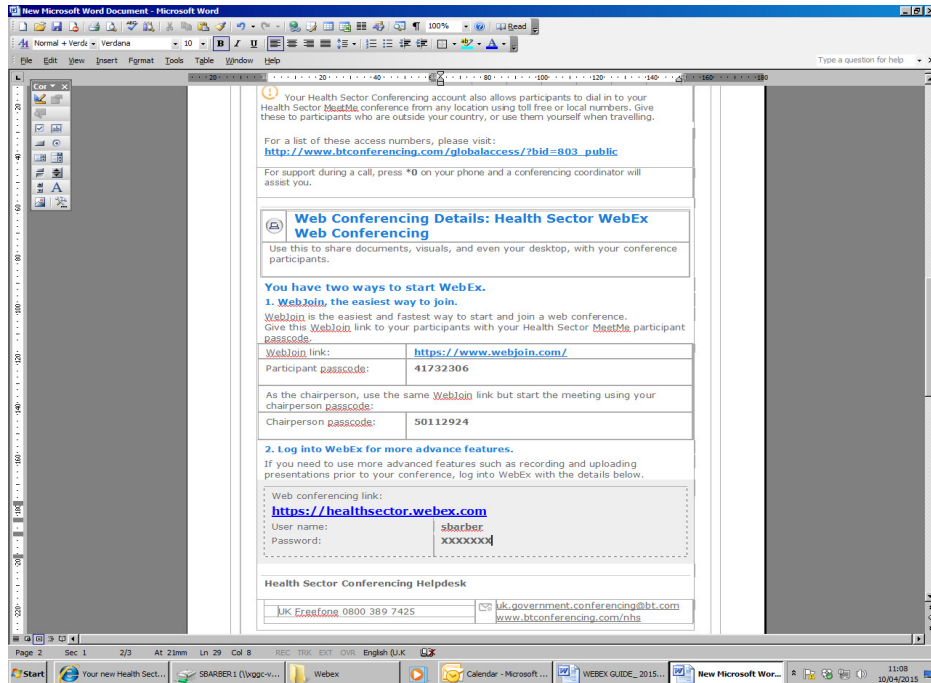
3.



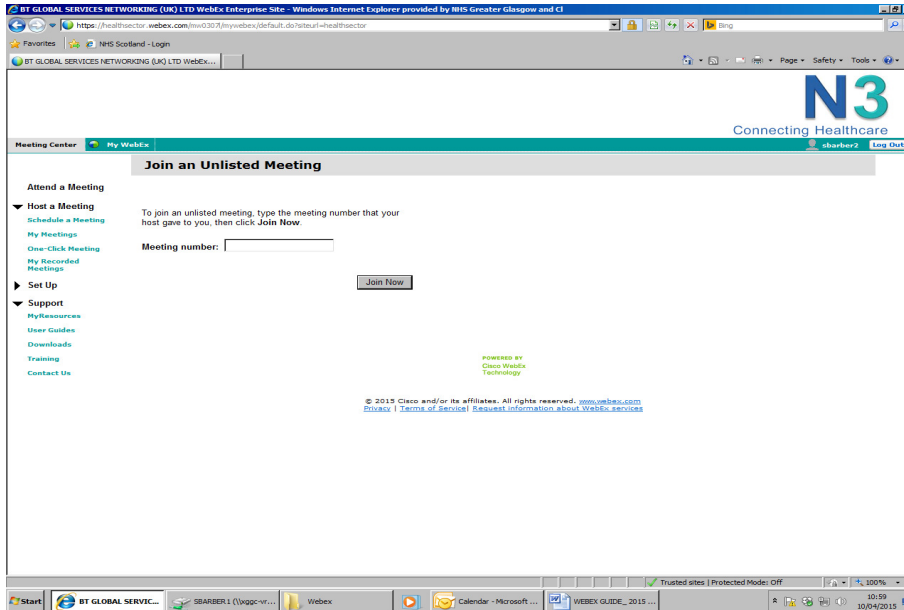
SETTING UP A WEBEX SESSION AS A HOST

From your personal log in details email you can click on the link <https://healthsector.webex.com>

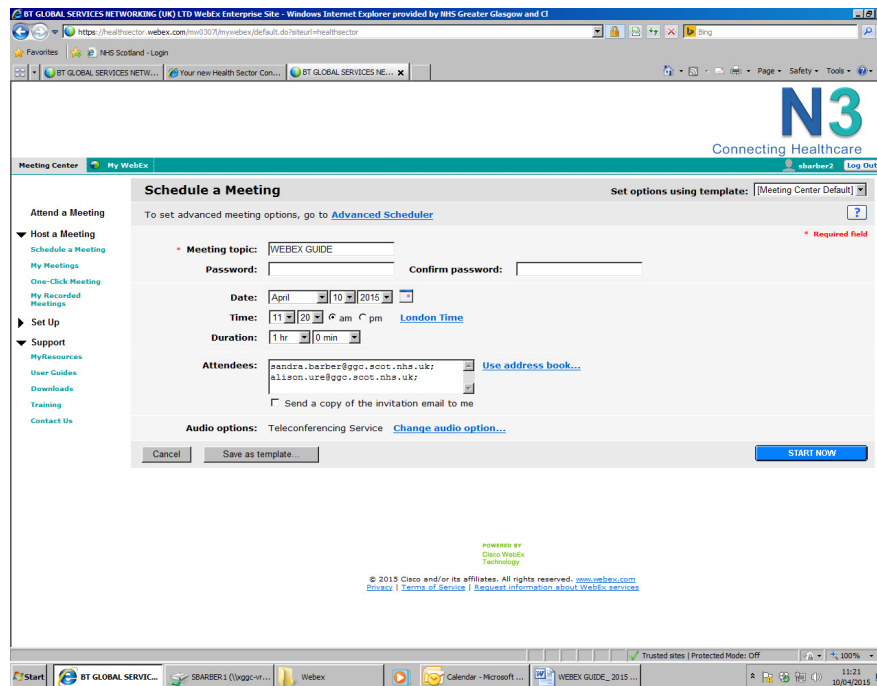
11.



12. Host screen



13. Click on schedule a meeting



- Name your meeting
- Complete the date and time fields remember to change time zone
- Duration of meeting
 - Extend the time in case meeting runs over.
- Add email address of attendees
 - For ease; have all emails for members attending the meeting in a word doc, copy and paste into this box.

➤ Alternatively when you receive the email notification forward it to participants – this way you can add further information about the meeting. Suggest simplifying the message in the email as it can be confusing.

- Use advance options to select if you want people to be announced on joining or leaving the meeting, otherwise the system will just bleep when people join or leave.
- Click on start now
- Automated email will be sent to all attendees

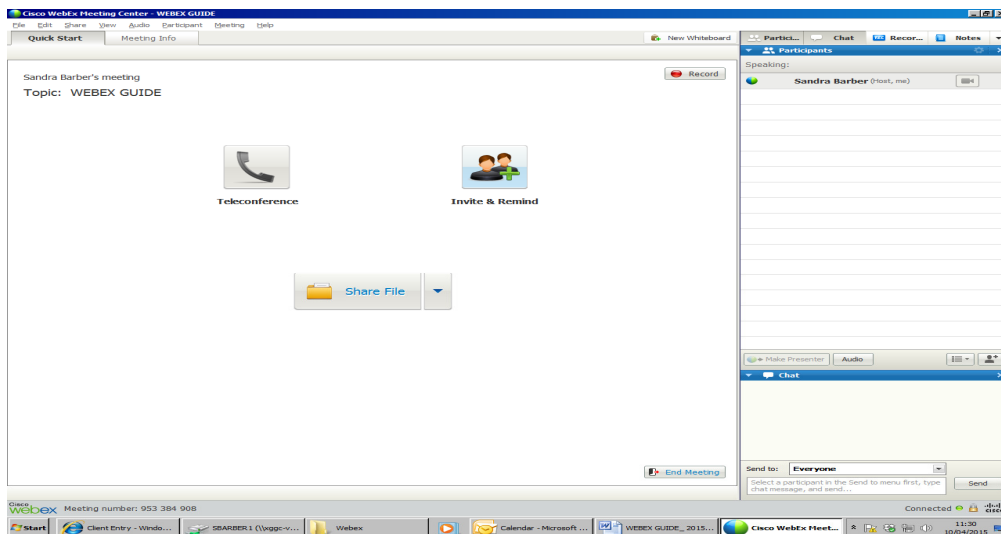
➤ If this is new it may be best to start with manageable numbers in the first instance e.g. 6-7 people joining but you can have many people joining though in our experience can be problematic with over 70 people.

When it is time to open your WebEx click on the link in the email and use dial back OR call the freephone number.

Benefits of using call back

Using this functionality makes it easier for the facilitator to identify who is speaking as names are only displayed once and is very useful for mobile phones users as it saves them having to dial an 0800 number.

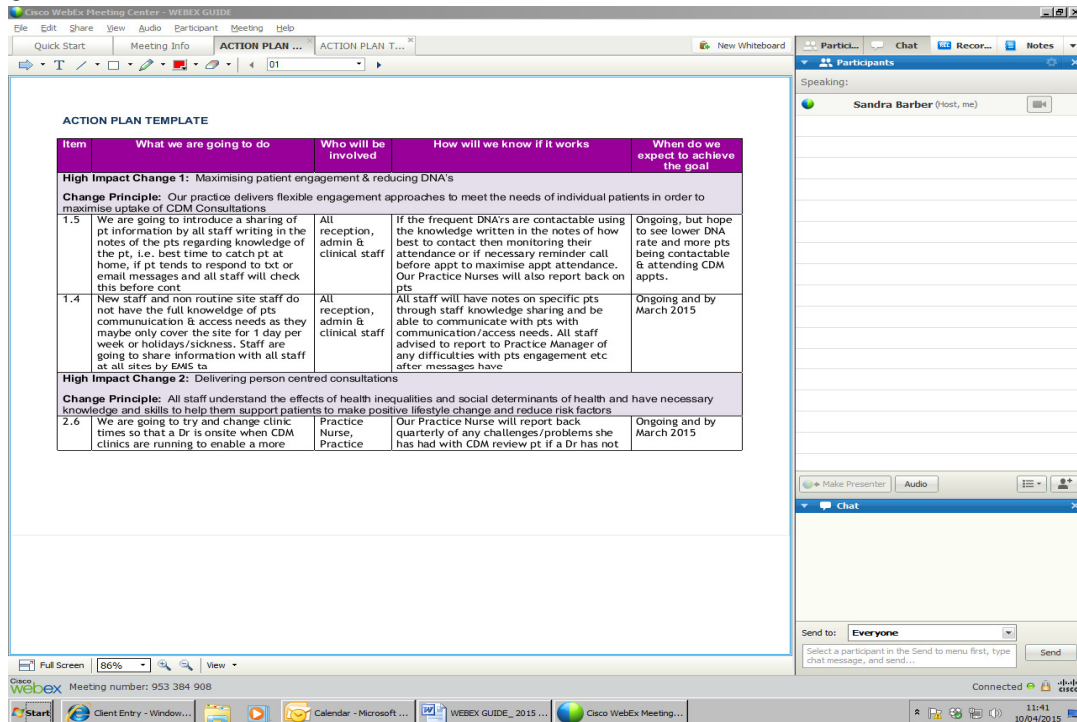
14.



If a member hasn't joined you can send a reminder by clicking on the invite and remind icon.

As host you can share numerous files as mentioned; e.g. pdf, doc, excel, power point. Go to Share File options, and select the application you want to share. Also you can use Alt/Tab on keypad to flit between different files, programmes.

15.



To the right hand side of the screen above (15) see the icon participants the names of members will come up who have joined the session.

The bottom right box of participant section can be clicked on by members this will show hand icon. Allowing the host to be aware someone would like to contribute to the discussion.

- Remind member to click again to remove when finished adding to the discussion.

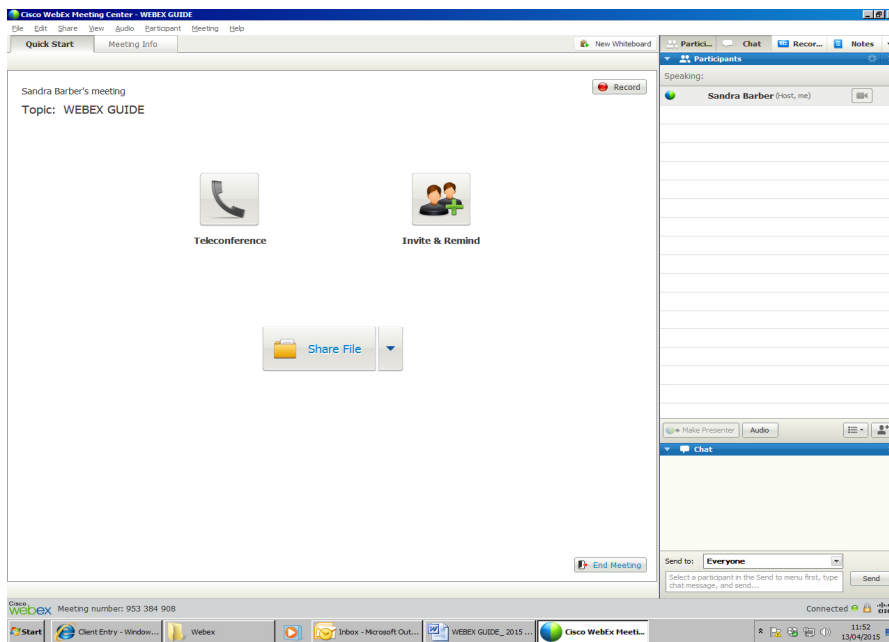
Chat box at bottom right of the screen can be used to send a message to everyone or via the drop down box individuals at your meeting.

- E.g. this can be useful if having a problem with telephone to highlight to host without interrupting the flow of discussion.
- It is useful to add a welcome message to participants and remind them of the number to call and the code.

You can hand over host rights during the meeting by moving the round presenter ball to another name on the list of participants.

You can record meetings using *8, see help on WebEx system to do this.

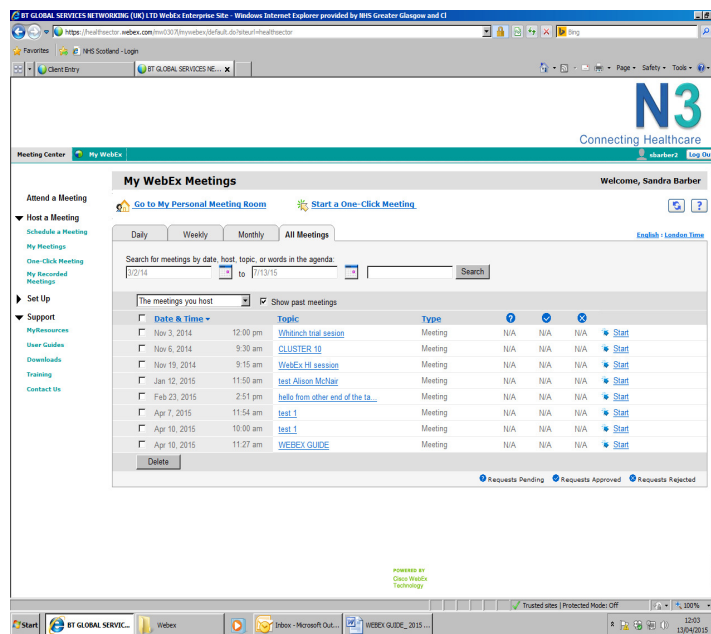
16. Close meeting



When your meeting is finished you may want to recap on any outcomes/ actions.

Inform participants the meeting is ending. Participants hangs up from teleconference and you click end meeting at the bottom right hand side 'End meeting'

17. Check the meetings you have hosted



When in the host screen (12) click on my meetings, to the left of the screen, choose from options; all meetings, monthly, weekly or daily.

If choosing option all meetings you can enter a date range to narrow you search as shown above.

HINTS AND TIPS SHEET

Preparation

Set up a meeting on BT WebEx system, remember to change the time zone to London. If you are using a shared login details check no other meeting is booked as only one can be hosted at a time on an individual username.

Send invite in advance so users have time to test the functionality from their pc or mobile device by providing the test url link. It is best to simplify the email before forwarding to participants Provide a meeting number because for some people who have difficulty accessing WebEx it is an easier way to join. All browsers should now work but if problems advice use of Internet Explorer.

- Send a reminder on the day.
- Send agenda and slides in advance to participants if possible/appropriate
- Read over your documentation to familiarise with content.
- Prepare any questions prior to meeting to encourage discussions.
- Situate in a quiet room free from distractions (where possible). Background noise can be distracting to you and difficult for others joining the session.
- Dial in 10 mins before start of the session.
- Keep phone on mute when not speaking....
- Opportunity to share your ideas and hear about others ideas
- Ask members to jot down questions to ask when it's their turn or to use raise hand icon to contribute earlier where appropriate.
- Problem solving within the members attending the meeting.
- Build confidence in practical use of WebEx.

To ensure you have a process to go round all members involved in the session it may be helpful to set up a wee template to jot down responses and questions from your sessions.

Meeting Etiquette

Introduce WebEx etiquette –

- Ask participants to clear distractions and silence mobiles as they would in a face to face meeting
- Ask them to mute their phone when not speaking to prevent interference on the call – use mute button or *6 or the host can use *5 to mute all phones
- Be considerate to all members of the session.
- Avoid talking over members.
- Remember you all have an opportunity to contribute.
- Tell them how to use the slide bar at top to see participants and chat box,
- Tell them how to use the hand to ask questions,

Remember to get permission if you plan to record session.

Technology

Remember, if you need any help just key *0 for Operator assistance.

Key #1 to check all participants are on the call

Key *6 to mute your line and *5 mutes all other phones – tell participants to use raise hand button to ask a question.

Key #2 to find out how many people are on the call; for security reasons, you may want to know who's listening.

Share the necessary applications on your desktop before people join so you are ready to present and you can easily move between screens.

Practice passing the controls to others if this is part of your meeting; remember any slides have to be on their computer.

Recording - To record the call use *8 but remember to ask permission of attendees to record conversations.

Running the meeting

Take list of attendees to review if people have signed in.

Begin with a slide with your photo to introduce yourself

If possible ask everyone to introduce themselves – it is helpful to encourage everyone to speak early so they are more likely to contribute and ask questions.

Use a mix of slides and live demo as appropriate

Use the Poll option to engage attendees or to get feedback at the end of the session – it is easy to paste your question and reply options into the system. Go to the Help on the WebEx system for guidance. It is best to open the call early and enter the questions and answers in advance.

To close the meeting

To close, summarise key actions and agree next meeting times as appropriate.

Key ## to end call

Remember to END Meeting and log out of WebEx.