WebEx is a web conferencing tool. It allows instructors to hold ‘live’ classes, office hours or training over the Internet, and to record these sessions for later use. It can also be used for advising and other individual consultations. To host meetings and classes using WebEx, you will need to sign up for a Host Account. (Students and other participants in web meetings do not need a WebEx account.) At a minimum, participants should have a computer microphone and speakers or headphones. Instructors may also want to use a webcam.

This document outlines the basic steps for setting up a WebEx account and scheduling and accessing a basic meeting.

Quick Overview of Setting Up and Hosting a Meeting

Setting up a WebEx Account
1. Go to http://www.hartford.edu/mts
2. From the menu listed on the right, select WebEx.
3. To sign up for a new account, click on the Sign Up button under I do not have an account and complete the information on the Sign Up form.
4. Under WebEx Services, select Meeting Center. We recommend you start with this, as the Training Center is more advanced. When the form is completed, type in the verification words and then click Sign Up Now.
5. When the account has been created, you will receive an email confirmation for each service you selected, plus an email listing your log in information. This last email will provide you with your username, a link to set up a password and a link to the WebEx login page.

Important: It can take up to 24 hours for you to receive a confirmation email, especially if you sign up for an account outside of regular business hours.
Scheduling a Meeting

1. Go to http://hartford.webex.com
2. Click on the Login button and log in.
3. To preschedule an invitation-only meeting, click on Meeting Center. (You can also use My Personal Room to start a session immediately, but it will be open to anyone who finds it. If using Personal Meeting, select it from the left hand menu, and then jump down to step 9.)
4. From the left hand menu, select Schedule a Meeting.
5. Complete all information in the schedule meeting form. The password will be provided to meeting participants. You can add the participant’s email addresses under attendees, so that they get an invitation. The email invitation will include a link they can use to join the meeting. Option: Use Start Meeting to start a meeting immediately. This is the only option you will see if your ‘start time’ is less than fifteen minutes from the current time.

NOTE: The WebEx invitation email is very formal and can be difficult to read. We recommend that you use your own email address in step five and send it to yourself only. That way, you can edit the text, make it less formal, add some notes about what your students can expect, then forward it on to the participants.

6. The day of the meeting, go to http://hartford.webex.com. You can also get to this site by opening the email sent to you as host and clicking on the embedded link.
7. Select My Meetings.
8. Click on Start button next to your session.
9. To use a headset, select Call Using Computer. Participants should only use the phone call-in if they have trouble connecting to their computer audio. Remember, one-on-one meetings can use a regular phone.
10. Click on the dots to access “More” menu, then select Test computer audio. Be sure you choose which audio sources you are using (e.g., Logitech Webcam, etc.) from the dropdown menu next to Speaker and Microphone.
11. Click OK.

NOTE: All participants must click Call Using Computer to connect audio.

Hosting a Meeting

1. If you have a webcam, click on the video icon or Start My Video next to your name in the WebEx meeting room to begin sharing video.
2. Set all participants’ microphones to mute when they enter, so you can make opening remarks and explain how the meeting works. You can do this by going to **Participant ➔ Mute on Entry** at the top of the screen.

3. To invite participants, click on the “*Invite and Remind*” button, fill out the email addresses and click send. Alternatively, you can use “*Invite with your local email*”, which will open up Exchange with a read-made invitation text. (You might want to customize it for tone.)

4. Optional: Once participants are showing up, click on **Record Meeting** in the upper left hand corner of the main presentation screen.

5. Click on the **Chat** icon in the upper right (they are muted, so this will allow them to ‘talk’ using text).

6. To share documents or your desktop, click on the **Share Application** tab, select an open application (must be open ahead of time) and then click on the **Share** button.

7. Present content to participants, checking the text box every so often.

8. To make someone else the presenter, select the person’s name from the participants, and then click the **Make Presenter** button. You can always take the role back using the globe icon next to your name.

9. When the meeting is finished, select **Leave Room** and send documents to participants.

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**Detailed Description of Setting Up and Facilitating a Meeting**

**Logging in to WebEx**

To log in, go to [http://hartford.webex.com](http://hartford.webex.com) and click on **Log In** on the upper right corner of the screen. When you first log in, WebEx may ask you if you want to set up desktop Productivity Tools. Select “Later” for now.

Click on the **Meeting Center** tab at the top if you are not already on it.
You can schedule an impromptu meeting right away using the default **Enter Room** under Meeting Center. Please skip to page 7 if using this option.

![Quickly Starting a Meeting with Personal Room]

To set up a scheduled meeting for some time in the future (has to be at least fifteen minutes from current time), click on **Schedule a Meeting Center** in the tabs across the top. You will see the calendar of scheduled meetings. Before you begin setting up your own meetings, you may want to visit the following menu items:

- **New User Reference** access how-to guides and help in a new window.
- **Attend a Meeting** lets you browse open meetings and join them.
- **Host a Meeting** is what you use to set up a pre-scheduled meeting. It also allows you to establish preferences and check your media players prior to entering a WebEx session (recommended).
- **Support** has lots of excellent resources. It is recommended that you attend the live trainings, as WebEx conducts these using WebEx itself. They are very good, as are the User Guides. MyResources is an end-user support site. The host/administrator can access this using the same credentials as the host account; others can create their own account on MyResources. MyResources will provide the host with a record of invoices, knowledge base, etc. Other non-hosts probably get some, but not all these options.

**Setting up a Meeting or Training Session**

To set up a basic meeting, log in to WebEx and click on the **Meeting Center** tab, then **Schedule a Meeting**. If you want to use polling or other advanced features during your session, select the **Training Center** tab instead.)
Fill in the following information:

- **Schedule for:** - Pick a name from the dropdown menu.
- **Meeting Type** - Leave on Meeting Center.
- **Meeting Topic** - Fill in a topic that will make sense to you and attendees. By default, it will be listed on public calendar – deselect if you want it unlisted.
- **Meeting Password/Confirm Password** – This should not be your WebEx password, but rather a password for participants to log in to your meeting.
- **Meeting date and time** – If you do not fill in these details, WebEx will assume you want to start the meeting immediately.

At any time hereafter, you can click **Start** to start the meeting, or select next to provide more set up details.

- **Meeting Date/Meeting time** – Be sure you leave yourself 15 minutes prior to actual start time you put in here, so you can be ready when participants join.
- **Estimated Duration** – By default, the duration is one hour. Your meeting will end automatically at the scheduled end time.
- **Email Reminder** – WebEx will send a reminder at the time you suggest here.
- **Recurrence** – If daily or weekly, indicate it here.
- **Select Conference Type** – Since your University department gets charged if you use WebEx Audio, please select WebEx Audio, but be sure to tell attendees NOT to use the toll free number unless they have no alternative. They should use headsets on their computer whenever possible. If you want to avoid charges, deselect *Display toll-free number and global call-in numbers*.
- **Beep** - This sets up the sound heard when participants enter and leave a meeting.
- **Attendees** – Enter the email addresses of the attendees, separated by a semicolon. WebEx will send an email invitation to all attendees. If you do not enter any attendees, you will receive an email invitation that you can forward along to the participants.
- **Security** – Skip over these options.
- **Registration** – We do not recommend required registration.
- **Agenda and Customizable Welcome** – Definitely want to set this up, adding a welcome announcement, along with information about muted audio, how to chat, testing audio, how to get help, etc. You can also attach a PowerPoint presentation or other file, so it will already be ready when you start your presentation. Ignore the auto-advance options; these are for training sessions that have to be timed to fit regulations.
- **Meeting Options** – Select all of them; doesn’t mean you have to actually use them…
- **Privileges** – The default should work fine...but customize as it suits your purpose. This is what you are going to allow participants to do during the meeting. Remember, if you
want them to have privileges or share a document, this can easily be done during a meeting by giving them the presenter role on a temporary basis.

When you have completed all the options, click on the blue Schedule Meeting button. If you are using Outlook or Google for your email, you will have options to add the meeting to your calendar automatically.

**The Meeting Confirmation Email**

When you schedule your meeting, you will receive a confirmation email that you can forward on to your participants. It contains the following important information:

- **Host Key:** If your computer crashes, you will need this number to re-enter the meeting as the host. (Your students do not need this number.)
- **Logistics for Meeting** date and time, duration.
- **Join WebEx meeting button** make sure participants read the password information before clicking this button!
- **Meeting Number:** If a participant is logging in on an iPad or cannot click on the meeting link, he or she will need to enter this number on http://hartford.webex.com to enter the meeting.
- **Meeting Password:** Make this something easy, such as 1234.
- **Audio conference and access code information:** Use these if you plan to connect to the conference via phone. However, please note that your University department will be charged each time this is used, so it is recommended that you use the computer audio instead whenever possible.

**Accessing Your Meeting**

About 15 minutes prior to the start of your meeting, log in to WebEx and click on My WebEx in the top margin. From the menu on the left, select My Meetings. Locate your meeting in the calendar, and then select Start.
Participants will use the email invitation to join the meeting. It’s a good idea for them to try to join 15 minutes ahead of time as well, so you can provide assistance should they need it. (It might take a minute for the session to load.) Although the phone call-in number is posted in the invitation, it costs your University department money to use it, so try to use it only as a last resort for those unable to get computer audio. Use chat to communicate with those who are having trouble with their mic.

Once the meeting room opens, all participants should select **Call Using Computer**.

After connecting, you should test your audio. Click on the three dots to access the ‘more’ menu, then click **Test computer audio**. The lines underneath **Speaker** and **Microphone** should move when you speak or someone else is speaking. If not, make sure you have correct audio source selected. You can check this by selecting the dropdown menu net to each audio icon.

Click **OK** once you know you can be heard and can hear others.

You can also use the Audio dropdown menu at the top of the screen -> **Test Computer Audio**.

**The Meeting Room**

Once in the meeting room, the screen is divided into sections. Across the top left are dropdown menus with all meeting options. In the middle is **Share Application**, which allows you to easily share a file or application from your computer (so long as the application is already open). In the upper right hand side are basic meeting tools, including the ‘roster’ of participants, the chat tool, the recorder tool, and notes. If you wish to share more than just an application, select the **Share** dropdown menu at the upper left of your screen. Basic sharing types are listed below:

- **Share File** – Present a file from your computer (i.e., PowerPoint). This automatically opens up on a Whiteboard, so you can annotate the file, etc.
- **Share Application** – Presents a shared application, but not your entire desktop. The advantage here is that no one will see other things that might accidentally popup, like an IM from your kid at school, etc.
- **Share Web Browser** – For showing participants websites.
- **Share Meeting Window** – Presents your entire desktop (be careful!).
You may find it helpful to share a few PowerPoint slides or a document at the beginning to point out the basics of WebEx (using the chat, Whiteboard, etc.). After that, you can begin sharing a file or application as part of the meeting. To do so, be sure your PowerPoint is open, and then select **Share Application** to access your PowerPoint slides.

If you are sharing your desktop or an application, the WebEx window will shrink into a collapsible menu at the very top of your screen. It will expand if you click on it. The first button on this menu is used to stop sharing and return to your ‘meeting room’, and the rest are for opening up the panels you need: chat, video, etc., as needed.

There is also a **Record** button, which you can use to record your session. The recording will save a video of the meeting, plus transcripts of any chats and copies of any shared files or Whiteboards. You can find the Record button by clicking on the **Quick Start** tab or by going to **Meeting ➔ Record**.

On the right hand side of the screen, you will see the participants who joined the session, along with a chat panel. As people join the session, they will show up in the participant panel. You can mute them, or make them temporary presenters so they can share their desktop. If any participants are connected using an iPhone or iPad, a mobile phone icon will appear next to their name. If a webcam is attached, the participant will be asked if he or she would like it turned on. This is recommended only in cases where there will be conversation between a few participants – and the conversation is the focus of the meeting.
Communicating with Participants

There are two ways to communicate with participants in your meeting: via audio (using a microphone and a webcam if desired), or via chat. You can use a combination of these in a single meeting. If you have a large group, it is recommended that the presenter speaks using a microphone while the participants communicate in the chat.

Mute on Entry is a useful tool, as it blocks out background noise and also because participants don’t always know that their microphones are live and can be heard by everyone. To mute all participants on entry, click on the Participant tab at the top left of the screen. Participants can unmute their microphones by clicking on the microphone icon next to their names in the Participants window on the right of the screen.

If participants are muted, they can ‘raise their hand’ and be granted permission to speak by the Presenter.
If you want to use a webcam during your meeting, click on the Video icon next to your name. If the camera was already on and active, the video should show up automatically. It is recommended that you turn on your webcam before entering the meeting room to avoid crashing the webcam software. **Important:** Only six participants can use their webcams at any given time, but you can swap them in and out by participant.

**The Participants Window with Activated Cameras**

To chat, simply type in the chat box at the bottom of the screen and select Send. It is possible to send private messages, but if you share the transcript at the end, all messages will show up, including private ones.

**Using the chat tool**
It is possible to make someone else a presenter. To do so, select the person’s name from the participants, and then click **Make Presenter**. Remember that presenter and host are not the same thing. The host is the only person with ability to start and end meetings. Should the host computer crash, the next person to have logged in is assigned host (or you can assign an alternate host in advance). Once the real host returns, he or she can use the **Reclaim Host Role** button.

**Finishing the Meeting**

When you are done presenting, you can share any documents used during the presentation, as well as send a transcript to the participants. Use the **File ➔ Transfer** menu to upload and share documents. As soon as you do this, the sharing window automatically opens up on the participants screen and they can then download the files. The files will automatically be saved to the participant’s **My Documents** in a folder labeled with the meeting name. Use the **File ➔ Save** menu to save the transcript of the chat, polls, etc. Next click **End Meeting** from the File dropdown menu options. You are prompted to save any work, if you didn’t already do so. It is recommended that you save files as a PDF, as this is the easiest option for most users to access.

Any meetings you have recorded will play back the screen shots, as well as the conversation. These are sent to the participants as a website link. Click on the link and the session is streamed.
Getting Help with Technology at the University of Hartford

**Faculty Center for Learning Development (FCLD)**
FCLD provides consulting and instructional support to faculty and staff who are using technology in teaching and learning. The FCLD Faculty Lab in Mortensen 203a is available for faculty support and use and is equipped with instructional technology-related equipment including: PCs, Macs, scanners, and projectors as well as support staff. Faculty wishing to use the lab may contact FCLD.
**Phone:** (860) 768-4661  **Email:** fcld@hartford.edu  **Website:** http://uhaweb.hartford.edu/fcld/

**Information Technology Services (ITS)**
**ITS Help Desk**
For general computer and Internet/network support questions (e.g., passwords, Internet/email problems, Banner, PC issues, campus Facebook).
**Phone:** on-campus (860) 768-4357 off campus (844) 292-3213  
**Email:** its@hartford.edu  **Website:** http://uhaweb.hartford.edu/its/

**Media Technology Services (MTS) – Harry Jack Gray Center E113**
MTS maintains and installs classroom equipment, such as projectors, Sympodiums, and interactive whiteboards, delivers and sets up technology needed for classes such as laptops, overhead projectors, microphones, sound systems, DVD/VCRs, digital cameras, etc., and provides instruction on its use. MTS is also responsible for overseeing ECHO360 Lecture Capture classrooms and administers WebEx web conferencing accounts. For more information, see their website: www.hartford.edu/mts