



# **WebEx Advanced Features Meeting Tools & Management – Level 2 –**

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DA WebEx Team Lead  
Slide Deck Version 04 • Sept 2023

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# Welcome/Introduction/Overview

# Welcome Back, Certified Hosts!

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- Thank you for your **continued dedication** to Democrats Abroad and working to help us communicate better as an organization.
- You are here as an experienced DA WebEx user - fantastic!
- **Level 2 Host Certification Training Objective:**
  - To give DA Certified WebEx Hosts more extensive training on **advanced meeting tools, moderation, and management**
- Expectations:
  - Be considerate, be patient, pay attention to details
  - Follow the rules and instructions!

# Training Overview: Take Away Lessons

## Level 2 – Moderating, Advanced Meeting Tools, & Management

### The training “Take Away Lessons” are:

- Reference prior Level 1 Training
- WebEx Apps: Shared Timer, Slido
- Navigating Screen Layout Views – Fullscreen layout options
- Supporting Roles during DA WebEx meetings
- Co-Hosts, Presenter, & Moderators – Scope and Capabilities
- WebEx Desktop App, Join Preview screen, and Browser Join
- Changing Participant Name and DA Naming Conventions
- Locked Meeting and the WebEx Lobby
- Purpose of Back-Channel Communication
- Breakout Sessions – How to setup and manage
- Creating and managing Webinar Events
- Combination Remote & In-Person Meetings: Set-Up, & Facilitation
- Live-Streaming WebEx meetings to Facebook Live and YouTube
- Create a WebEx Poll for participants
- Planning ahead with Sandboxes, time management, guest speakers, and when to consult the DA WebEx Team for help!
- Hands On: Facilitated Skills Practice

# Level 1 & Level 2 Training Differences

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## Level 1 Skills – Basics of Running a DA WebEx Meeting

- Scheduling DA WebEx meetings
- Managing the Host Role
- Understand WebEx Meeting Screen Layout
- Coordinating with Participants
- Requesting a Recording

## Level 2 Skills – Advanced WebEx Features & Moderation

- Video Layout/Display > Moving Speaker to Stage
- Supporting Participants > Joining WebEx
- WebEx Desktop and Mobile Apps
- Co-Host and additional Supporting Roles
- Meeting Moderator Skills and the Lobby
- Breakout Sessions and WebEx Polls
- Running a Webinar and Live-Streaming on YouTube or Facebook Live
- Combined In-Person and Remote meetings

## Level 3 – DA WebEx Team (Admins)

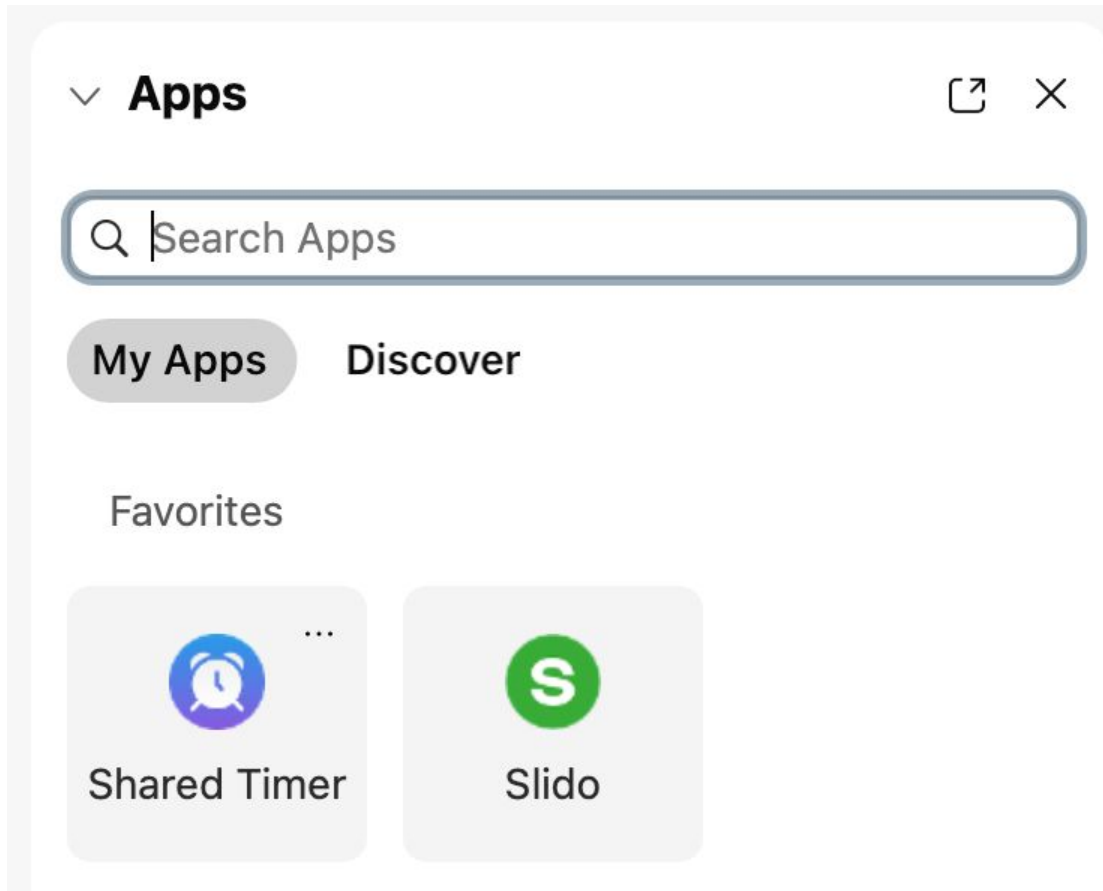
- **DA WebEx Global Team-Lead:** **Merrill Oates, Hungary**
- Send **ALL** DA WebEx queries to: [webex@demsabroad.eu](mailto:webex@demsabroad.eu)



New WebEx Apps – Limited Use

# New Feature: WebEx Apps

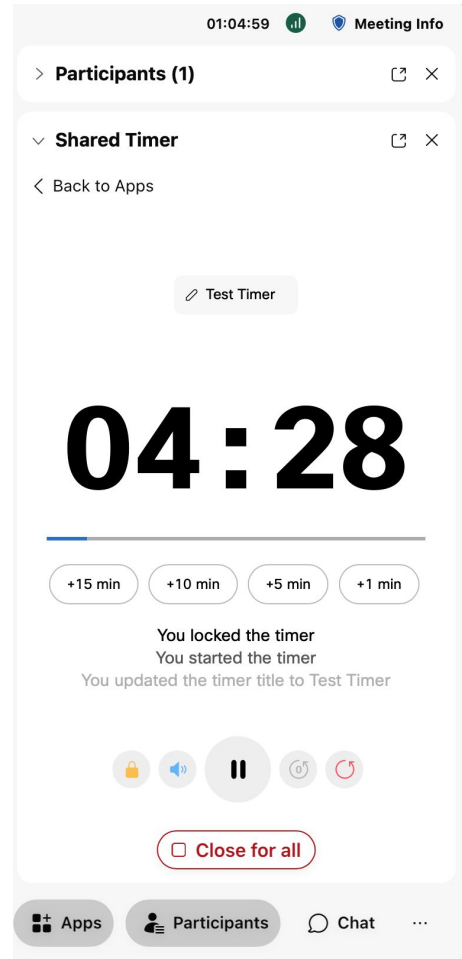
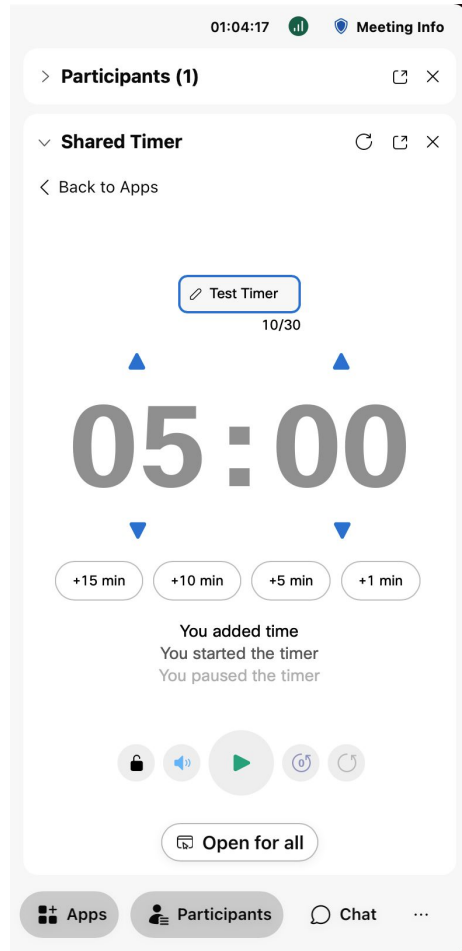
- WebEx Apps > New Embedded App Tools > Limited Use
  - Shared Timer
  - Slido > In-Meeting Polling, Participant Response, Q&A
- Requires WebEx Team Admin





# New Feature: WebEx Apps

- WebEx Apps > New Embedded App Tools
  - Shared Timer

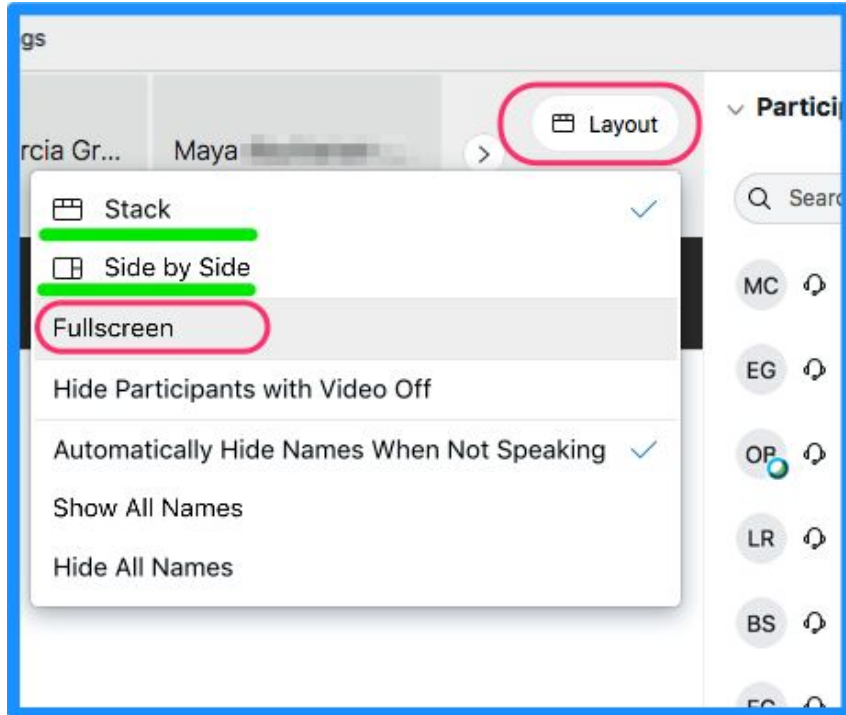




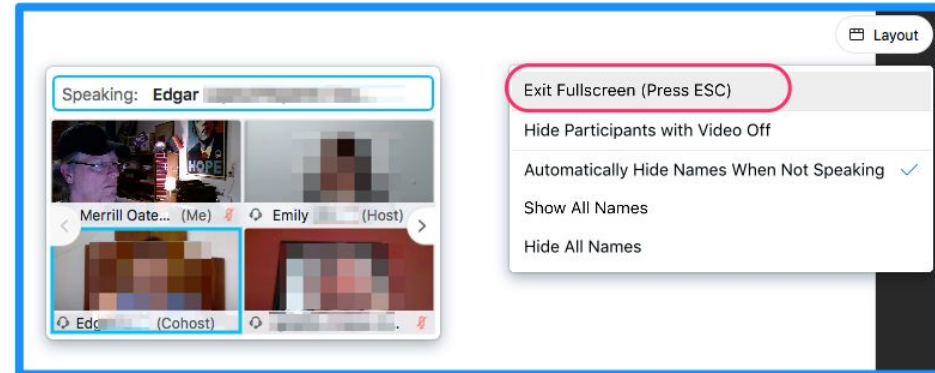
# Screen Layout View Options

# Default and Fullscreen Layout

## Screen Layout View Selector



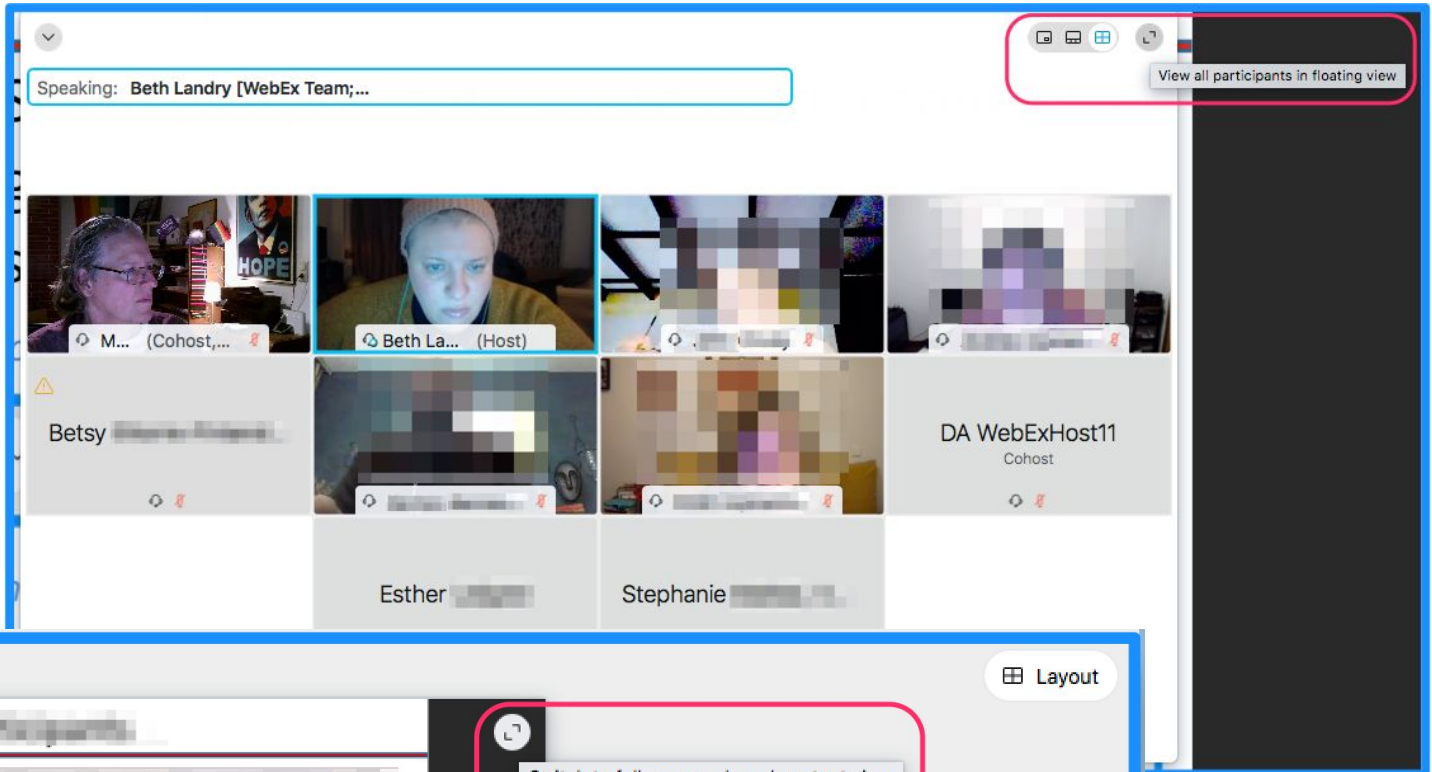
## Exit Fullscreen (ESC)



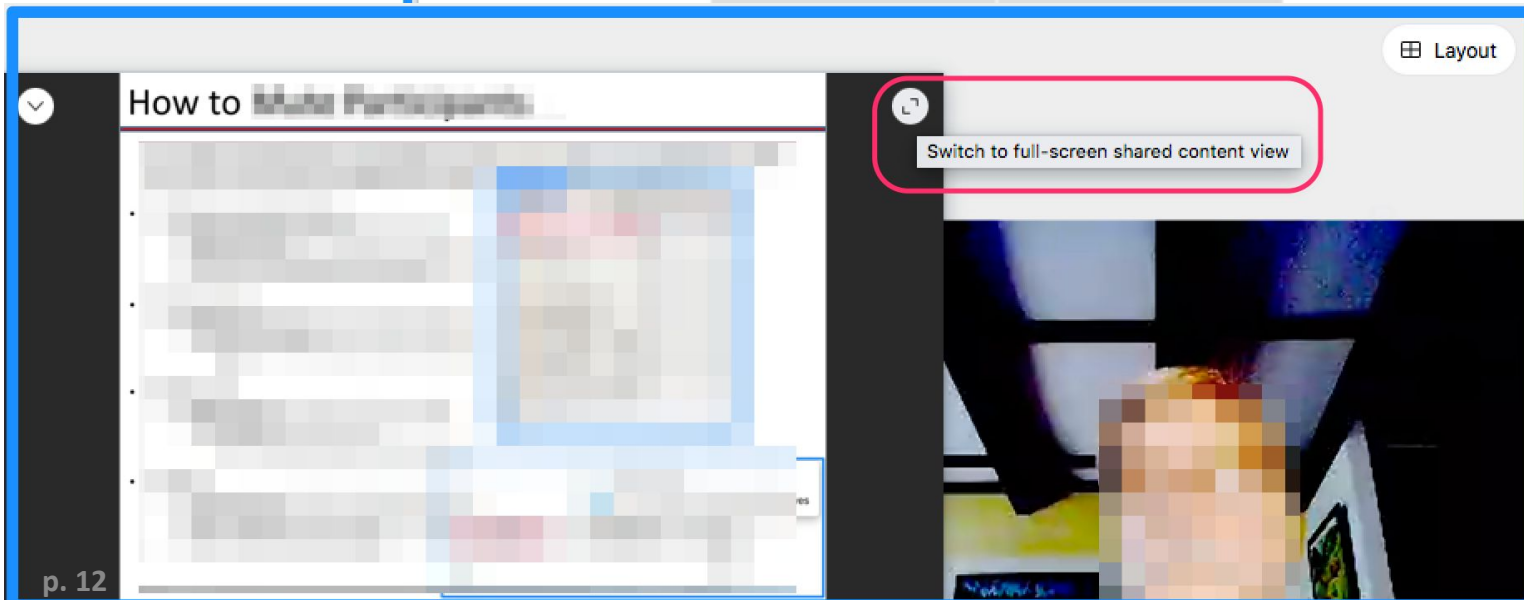
Use Fullscreen layout to have more control over viewing Participant videos, Presentation files, and Chat panel.

# Shared Content vs. All Participants

View all Participants in floating view



Switch to full-screen shared content view.



# Fullscreen Participants w/ Pop-out Chat

Speaking: Beth Landry [WebEx Team;...]

Participants in the grid:  
- Top-left: Beth Landry (Host)  
- Top-right: [Blurred]  
- Middle-left: [Blurred]  
- Middle-right: [Blurred]  
- Bottom-right: DA WebExHost11 (Cohost)



Chat

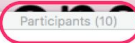
from Beth Landry [WebEx Team; Sweden] to Everyone: 7:31 PM  
\*\* hand up DEMO

from Beth Landry [WebEx Team; Sweden] to Everyone: 7:32 PM  
\*\* hand down DEMO

from John [Redacted] to Everyone: 7:56 PM  
\*\*hand up

Send to: Everyone

Enter chat message here



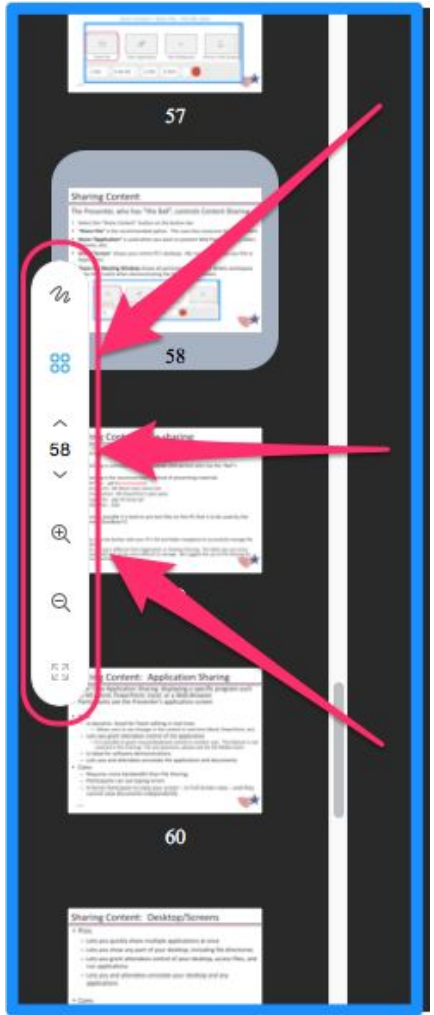
Participants (10)

Search

- Merrill Oates [WebEx Team Le... Cohost, me]
- Beth Landry [WebEx Team; S... Host]
- DA WebExHost11 Cohost
- Andrew [Redacted] Cohost
- Betsy [Redacted]
- Esther [Redacted]
- John [Redacted]
- Ken [Redacted]
- Kristi [Redacted]
- Steph [Redacted]

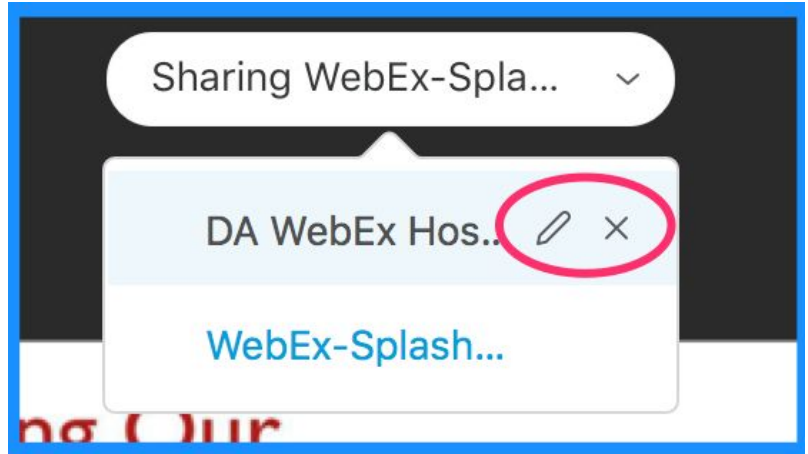
Mute All Unmute All

# Navigating Shared PDF Files



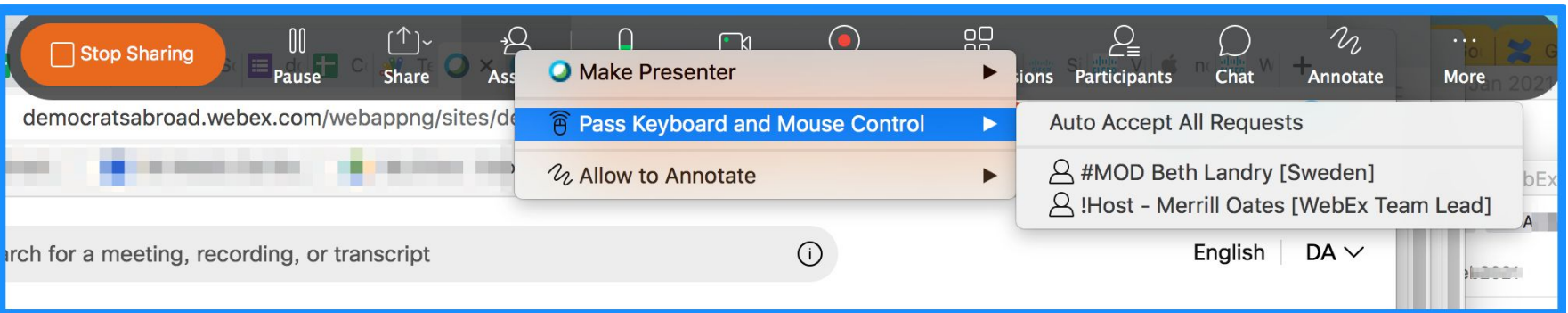
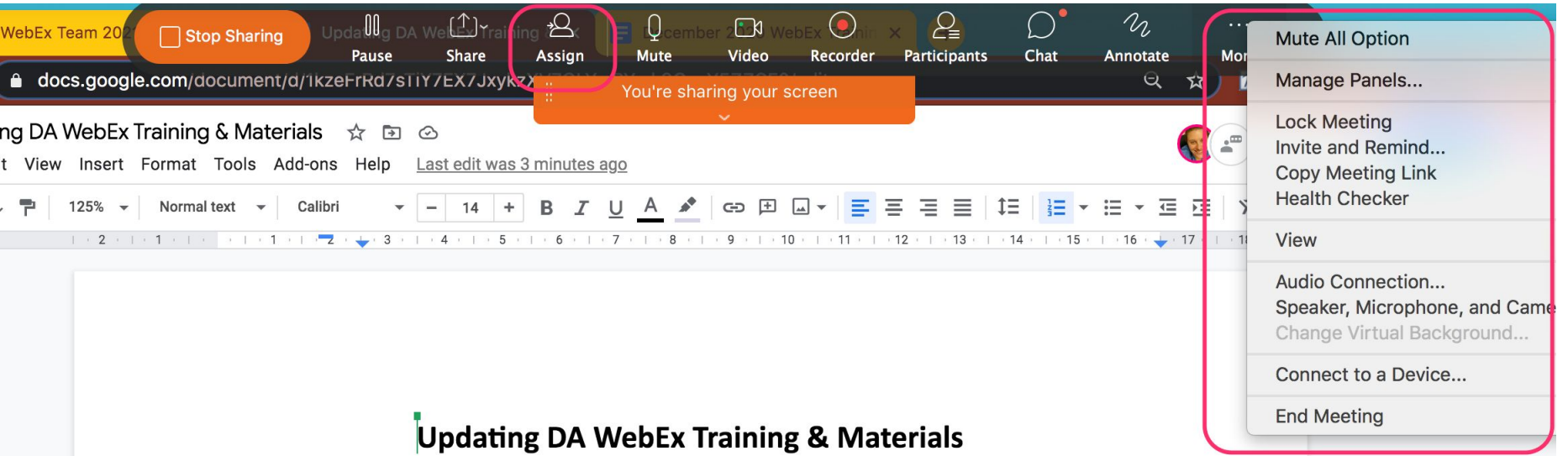
- Annotate
- Thumbnail View
- Select Page #
- Zoom-In,
- Zoom-Out

View available PDF Shared Files



(Removing shared content will revert to Participants-only view)

# Application Sharing – Pass Control



Caution: Sharing Keyboard and Mouse Control will enable user to have full access to your desktop or App, whichever you have shared.



# Supporting Roles & Privileges



# WebEx Supporting Roles – Overview

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**Co-Hosts:** Assigned by the Host (**NEW WebEx role**)

- Able to mute Participants and assign Presenter
- Can create Breakout Sessions and move participants to the Lobby

**Presenter:** Controls document presentations and screen sharing during the meeting

- Shares & Manages files/materials
- Has “the Ball” and can pass “the Ball” to others
- **The Ball** controls shared/viewed content
- Host & Presenter are 2 separate roles - However, these can be one person or different people

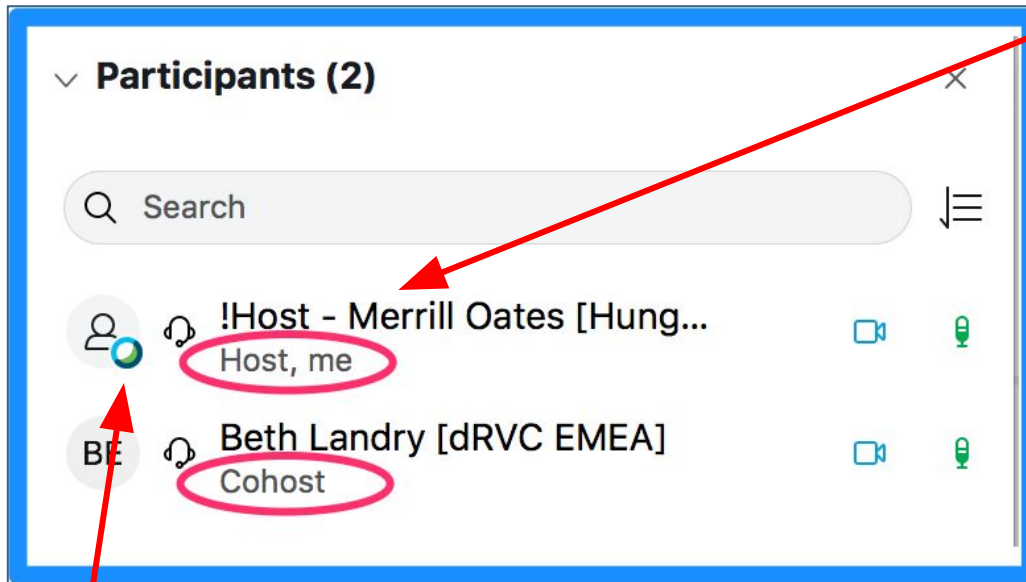


**Moderators:** Support the Host in managing the meeting

- Monitor the **\*\*Hand Up** Chat Discussion Queue – Provide “Q:” status updates
- Notify Host, Co-Host(s), and/or Presenter of meeting issues
- Anticipate/identify needs and support participants with troubleshooting

# Who is the Host, Co-Host, or Presenter?

From the Participant's List, look for the word Host or Co-Host



**Example:**

- **Merrill is both the Host and Presenter**
- **Beth is a Co-host**

## Who's the Presenter?

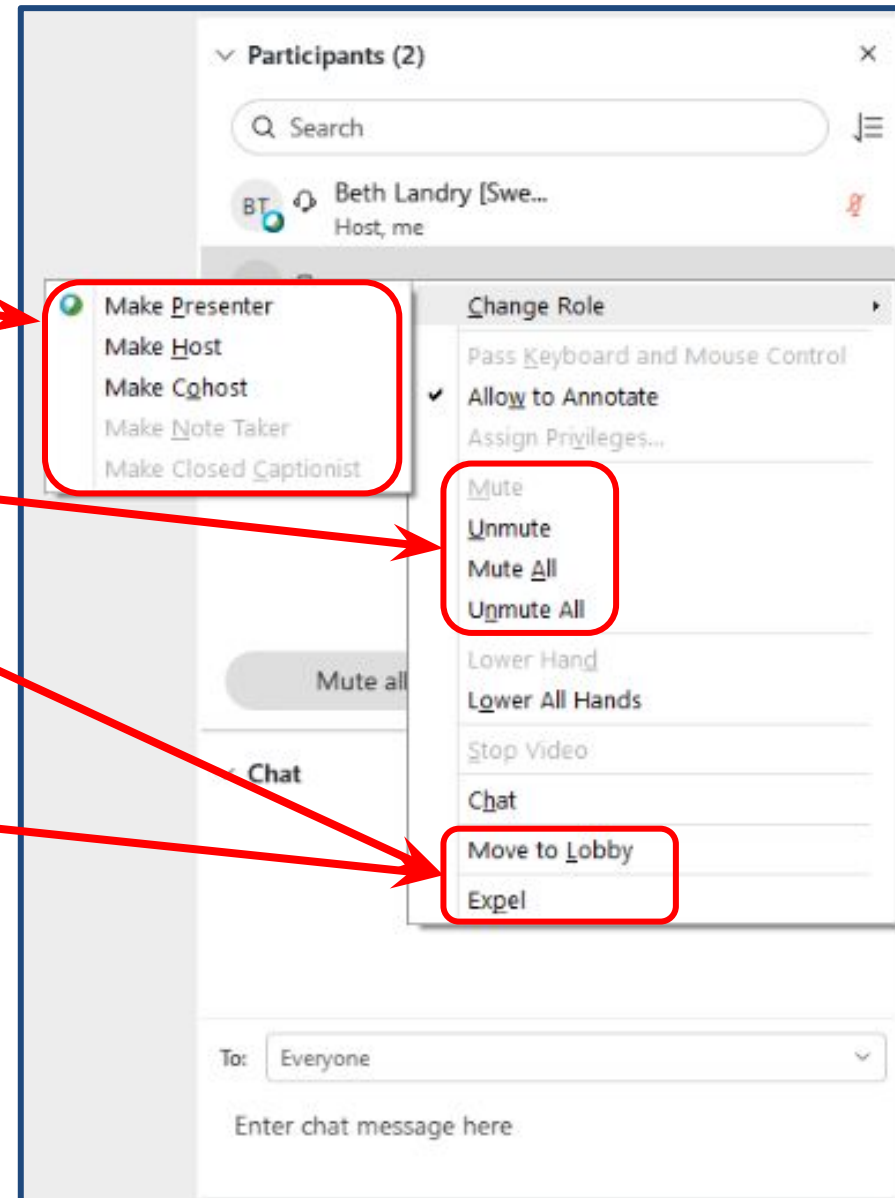


- The Presenter will have “the Ball”
- **The Ball** can be assigned to ANY meeting participant

# Administrative Tasks Using Participant List

You can select an individual participant to adjust their permissions.

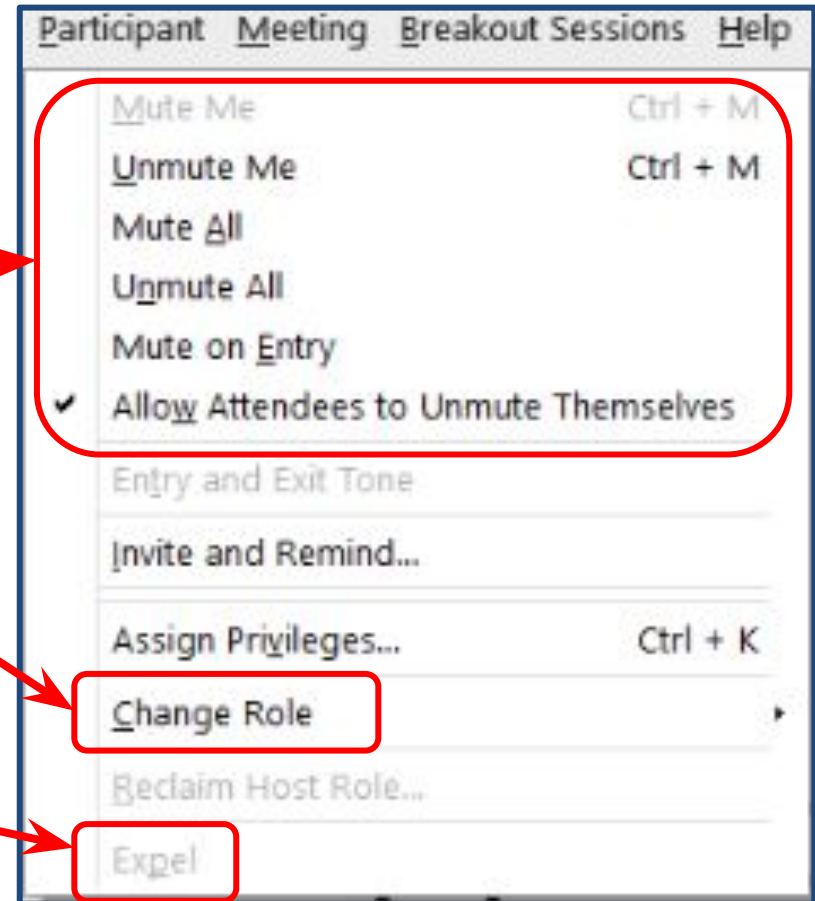
- Changing a person's role
- Muting options
- Moving someone to the lobby
- Expel a Participant



# Assigning Meeting Privileges - Participant Menu

You can navigate to the **Participant Menu** and adjust permissions for one or all attendees.

- **Muting options**
- **Changing a person's role**
- **Expel a Participant**





# WebEx Co-Hosts

# Co-Host Meeting Contributions

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## What can a Co-Host do?

- As a platform-assigned WebEx role, a Co-Host can:
  - Mute/unmute meeting attendees
  - Admit attendees from the Lobby
  - Place current attendees into the Lobby
  - Assign, or reassign, the Presenter role
  - Initiate, manage, and end meeting Breakout Sessions
  - Independently circulate between Main & Breakout Sessions
  - Expel meeting attendees
  - Lock the meeting

# Co-Host Meeting Contributions

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**Some things a Co-Host CANNOT do.**

**Only the meeting Host Can:**

- Assign someone else as a Co-Host
- Start, Pause/Resume, or Stop a meeting recording
- Send a broadcast message to participants in Breakout Sessions
- Receive HELP requests from those in Breakout Sessions

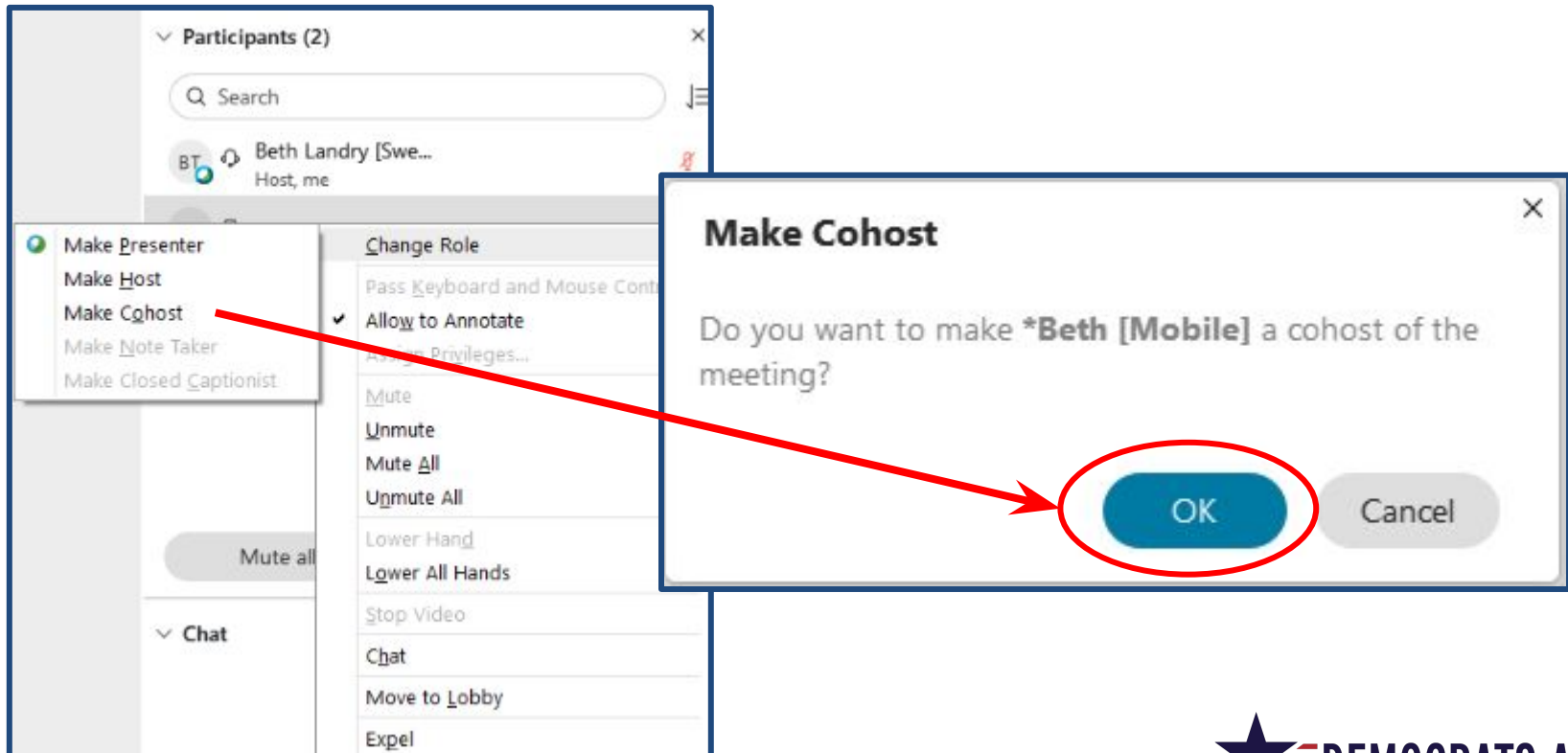
**Additionally, ONLY the Original Scheduling Host should:**

- Request cancellation of, or changes to, a scheduled meeting
- Request a meeting recording

# How to Become a Meeting's Co-Host

## If you are the Meeting's Host:

- You will need to assign Co-Host role to other participants
- They should be at least a Level-1 Certified Host
- The role of Co-Host is platform-assigned within WebEx





# How to Become a Meeting's Co-Host

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## Coordinate with Meeting Host:

- If you are asked to help Co-Host a meeting, understanding the meeting content is crucial
- Make sure you are aware of:
  - The meeting's agenda
  - Others in the meeting with delegated roles e.g. the Presenter
  - Resources/links to be shared during the meeting, if any
  - Who anticipated attendees are
  - Action items related to your role as a Co-Host
    - Before, during, and after the meeting



WebEx Presenter

# Presenter Meeting Contributions

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## What does having a Presenter add to meetings?

- Presenters are the meeting's **primary shared content manager**
- Only one (1) Presenter at a time in a meeting outside Breakouts
  - More about the Presenter role in Breakouts later!
- The Presenter can also be the Host or a Co-Host simultaneously
- Meetings with presentations, applications to view, etc. are assisted by having a person delegated specifically as a Presenter

## What can a Presenter do?

- Presenters, once assigned “the Ball,” can:
  - Share files as presentations
  - Share Applications and/or their Desktop screen
  - Move between different types of shared content ad hoc
  - Re-assign “the Ball” for another person to become Presenter



# Presenter Meeting Contributions

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## **Unless a Presenter is also the Host, they CANNOT:**

- Assign anyone else as a Co-Host
- Start, Pause/Resume, or Stop a meeting recording
- Send a broadcast to attendees in Breakout Sessions
- Receive/respond to HELP requests from those in Breakout Sessions

# How to Become a Meeting's Presenter

## If you are the Meeting's Host:

- You will need to delegate this role to other DA Leaders in advance
- In complex meetings, Presenters should be at least a Level-1 Certified Host
- The role of Presenter is a platform-assigned WebEx role

The image is a composite screenshot of the WebEx interface. On the left, a 'Participants (2)' list shows 'Beth Landry [Swe... Host, me]'. A red arrow points from the 'Make Presenter' option in the 'Change Role' menu to the 'Yes' button in the 'Change Presenter' dialog box. The dialog box asks 'Do you want to change the presenter to Beth?' and has 'Yes' and 'No' buttons. Below the dialog, the participant list is shown again, with 'Beth Landry [Web... Host, me]' and 'Beth - WebEx Training Demo' highlighted by a red box.

# How to Become a Meeting's Presenter

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## Coordination with the Meeting's Host as a Presenter:

- If you are asked to help as a Presenter, make sure you have:
  - The meeting's agenda
  - Files and applications ready to be shared
  - Closed out of ALL unnecessary tabs, apps, personal & confidential information you don't want to be inadvertently shared
  - Action items related to your role as a Presenter
    - Before, during, and after the meeting

# Re-Assignment of the Host Role

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## **IMPORTANT NOTE!!!**

Once the meeting has started...

- **Re-assignment of the Meeting's Host role, or**
- **Any person reclaiming the Meeting's Host role**

**...MAY REMOVE Co-Host and Presenter roles from facilitators!**

- This may cause Presenter content to **STOP being shared!**
- Meeting Hosts should be prudent with sharing the Host Key
- If you have the Host Key, have discretion in sharing with others and check with the Meeting's Host first before sharing elsewhere



# Meeting Moderators



# Meeting Moderator Contributions

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## What does having Moderators add to meetings?

- If you are a meeting Moderator, this is a **very important role**, and you will be the “eyes and ears” of the meeting Host & Co-Hosts
- As a Moderator, you are responsible for facilitating a smooth meeting

## What does a Moderator do?

- A Moderator is a Democrats Abroad-assigned meeting role:
  - Monitor the **\*\*Hand Up** Chat Discussion Queue
  - Provide “Q:” speaker status updates
  - Facilitate the meeting discussion
  - Post relevant info/links into the meeting chat
  - Be a meeting time-keeper
  - Relay actual or anticipated needs of attendees to meeting Hosts/Co-Hosts
  - Facilitate Breakout Sessions (needs to be assigned to a Session)

# How to Become a Meeting Moderator

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## If you are the Meeting's Host:

- You will need to delegate this role to other participants
- They should be at least a Level-1 Certified Host
- Moderators are Democrats Abroad meeting assigned roles
- Moderators can also be assigned as a Co-Host role

## Coordination with Meeting's Host:

- If you are asked to help Moderate a meeting, make sure you know:
  - The meeting's agenda
  - Who anticipated attendees are
  - Who or what you are specifically helping to facilitate
  - Action items related to your role as a Moderator
    - Before, during, and after the meeting

# Q's: Supporting Roles

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Q: Which WebEx roles are able to mute participants?

Q: Which WebEx roles can access the Breakout Sessions menu?

Q: Meeting Presenters should make sure to have \_\_\_\_\_ in advance?

Q: Which of the supporting roles is NOT a platform-assigned WebEx role?

# A's: Supporting Roles

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Q: Which WebEx roles are able to mute participants?

A: Hosts and Co-Hosts are able to mute participants.

Q: Which WebEx roles can access the Breakout Sessions menu?

A: Hosts and Co-Hosts can access the Breakout Sessions menu.

Q: Meeting Presenters should make sure to have \_\_\_\_\_ in advance?

A: Presenters should have the meeting agenda, files and applications, and knowledge of action items for before/during/after the meeting.

Q: Which of the supporting roles is NOT a platform-assigned WebEx role?

A: The Moderator role is NOT a platform-assigned role in WebEx.



# Name Change & Naming Conventions

# WebEx Site – Public Meetings List

## 3) <https://democratsabroad.webex.com/>

**Public Meetings**

01/07/2021 - 01/13/2021  Show earlier meetings

DW	1:00 PM - 3:00 PM Thu, Jan 7	DA Lyon First Thursday of January DA WebExHost11
DW	1:00 PM - 3:00 PM Fri, Jan 8	Heidelberg Chapter DA WebExHost11
DW	2:00 PM - 3:30 PM Mon, Jan 11	DA Sweden ExCom DA WebExHost11
DW	8:00 AM - 10:30 AM Tue, Jan 12	Jan. 12 2021 DA W DA WebExHost22
DW	8:30 AM - 10:00 AM Tue, Jan 12	Global Caucus Lead DA WebExHost11

**DA Lyon First Thursday of January**

Hosted by DA WebExHost11

1:00 PM - 3:00 PM | Thursday, Jan 7 2021 | (UTC-05:00) Eastern Time (US & Canada)

**Join Meeting** ▼

Use desktop app ✓

Use web app

OK

Home

Meetings

Support

Feedback

Download

DemsAbroad Links

**Once you fill in the meeting password and select Join Meeting, you should be prompted to enter your name and email prior to entry.**

# Changing Your Name for a WebEx Meeting

## 3b. Join via Web Browser:

 <https://democratsabroad.webex.com>

In the DA WebEx website enter the 10-digit meeting number

> Enter meeting information

Enter your Participant Name and the meeting password when prompted.

## Join a Meeting ⓘ

Enter the 10-digit Meeting Number HERE then click [Join](#)

# Roles & Meeting Naming Conventions

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## The Host and Co-Host(s):

- As platform-assigned roles within WebEx meetings, Host and Co-Host will appear next to your name and bump you to the top of the Participant attendee list

## The Presenter:

- The Presenter is a platform-assigned role in WebEx meetings
- If the Presenter is not the Host or Co-Host, you will have “the Ball” next to your name and be bumped to the top of the Participant List

## Meeting Moderator(s):

- As Democrats Abroad-assigned roles, Moderators will **not be known automatically** to attendees nor will their names be bumped to the top of the Participant attendee list



# How Can You Make Your Moderators Visible?

## Adoption of Naming Conventions:

- To ensure that your Moderators can be easily found in the Participants List, use the DA standardized naming convention in WebEx

## Naming Conventions & Examples:

- Usage of symbols in front of a person's name during the meeting will bump that person nearer to the top of the Participant attendee list
- This is especially helpful if you have many attendees, and makes it much easier to find these persons in the Participant list
- Asking your Presenter or Mods to re-format their names before entering the meeting, such as:
  - **!HOST - Jordan Smith [Country]**
  - **#MOD - Jane Smith [Country]**

A screenshot of a WebEx interface showing a 'Display name' input field. The field contains the text '#MOD Beth Landry [Sweden]'. The text is highlighted in a light grey box, and the entire input area is enclosed in a blue rectangular border.

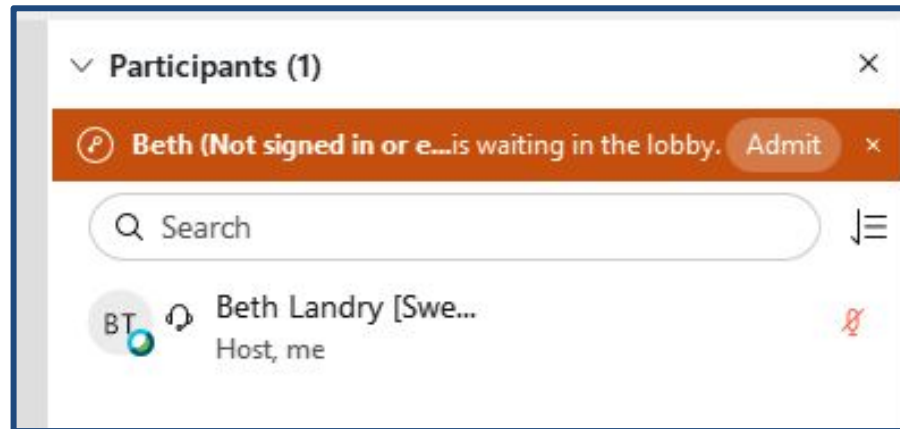


# The WebEx Lobby

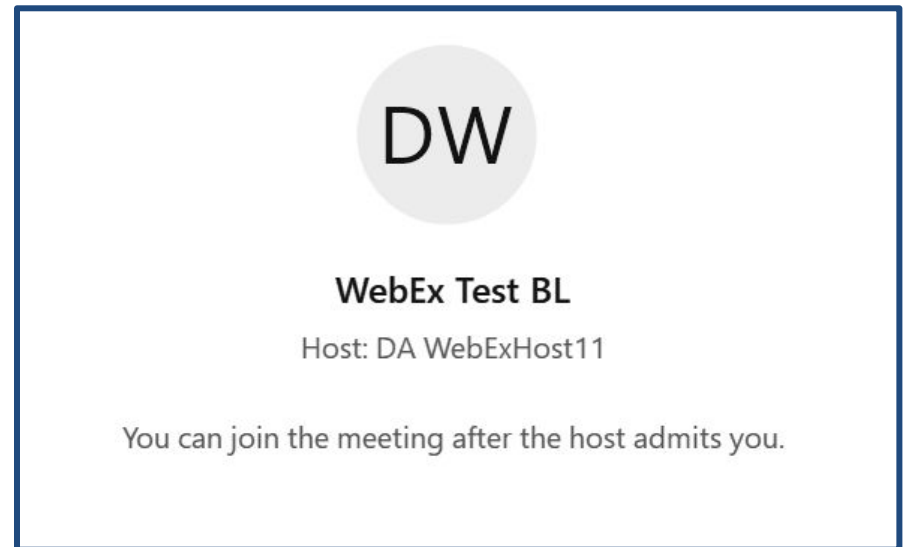
# The WebEx Lobby - What is it? What do we see?

Joining attendees are placed in the Lobby when meeting is Locked

What a Host/Co-Host sees:

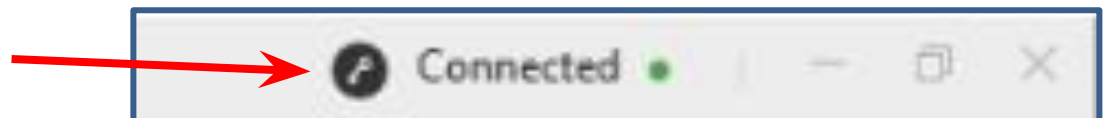


What an attendee in the Lobby sees:



When a meeting is locked, it looks like this in the top right:

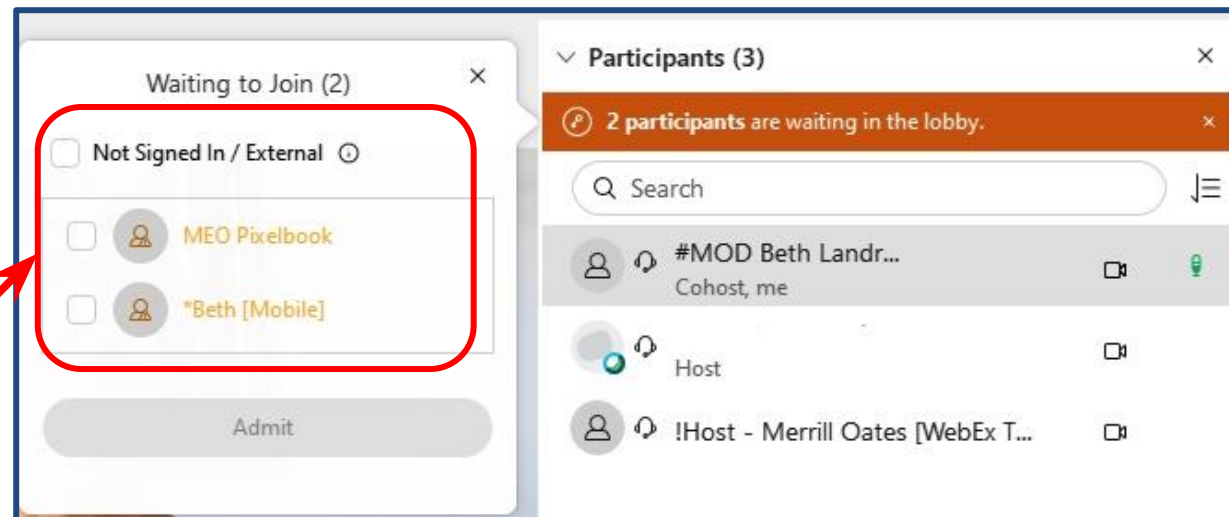
Meeting locked symbol



# The WebEx Lobby - How do we use it?

## Managing the Lobby Before a Meeting:

- Prior to a meeting's start, the Host or a Co-Host has the ability to **Lock the meeting** - this puts up a "gate" for incoming attendees
- All incoming attendees after the meeting is locked will encounter the Lobby waiting area message before being manually admitted



## The Host or Co-Hosts can choose to admit:

- One attendee at a time
- A selection attendees, or
- ALL pending attendees

# Using the WebEx Lobby After a Meeting's Start

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## **Managing the WebEx Lobby During a Meeting:**

- If the meeting is **locked**, the “gate” remains in place
- Further incoming attendees will see a Lobby waiting area message prior to being admitted to the meeting
- It is important to delegate a Co-Host, to monitor and admit attendees from the Lobby
- If you see an attendee re-join a meeting after having been admitted, they might be having connectivity issues or need additional assistance - send a private message to ask!

## **Moving Meeting Attendees to the Lobby:**

- Attendees in a meeting can be moved to the Lobby at any time
- These attendees will need to be readmitted to the meeting by the Host or a Co-Host



# Back-Channel Communication

# Back-Channel Communication - It's helpful!

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## If you are the Meeting's Host:

- You may wish to initiate back-channel communication for your fellow meeting facilitators to make sure everyone is on the same page prior to, and during the meeting
- This might be **Skype, Slack, WhatsApp, Signal**, etc.
- Be sure to *mute message signals* to avoid disrupting the meeting
- Unless already established, obtain consent from fellow facilitators to join the chosen back-channel communication method
- It is the responsibility of the meeting's Host to ensure that fellow meeting facilitators are adequately prepared and kept up to date on meeting needs

## Coordination with Meeting's Host:

- If one of your peers has asked if you can help facilitate their meeting, ask if there is a meeting back-channel communication venue

# Back-Channel Communication - It's helpful!

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## Why not just use the WebEx Chat Box?

- The WebEx Chat Box can only send direct/private messages to one person at a time, not a group of people
- It is helpful to separate the meeting's Chat Box from back-channel communication
- Recommend you use a second device, e.g. smartphone or tablet to monitor back-channel communication  
(Again, be sure to *mute audio notifications.*)

## Aide to Presenters

- Presenter may not be able to see WebEx Chat Box
- Caution with on-screen pop-up messages if sharing Desktop
- Recommend sharing static PDF files for presentation



# Q's: Comms, Naming & Lobby

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Q: Who is responsible for setting up a Back-Channel Communication?

Q: How can you ensure that participants can easily find your meeting Moderators?

Q: Which WebEx roles can admit participants from the Lobby?

Q: Do multiple participants in the Lobby need to be admitted to the meeting all at once?

# A's: Comms, Naming & Lobby

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Q: Who is responsible for setting up a Back-Channel Communication Channel?

A: The Host should set up the Back-Channel Communication.

Q: How can you ensure that participants can easily find your meeting Moderators?

A: Have Moderators use the DA naming protocols by starting with a symbol e.g. #MOD to be easily visible in the participant list.

Q: Which WebEx roles can admit participants from the Lobby?

A: The Host and Co-Hosts can admit participants from the Lobby.

Q: Do multiple participants in the Lobby need to be admitted to the meeting all at once?

A: No. Participants can be admitted to the meeting as necessary.



# WebEx Breakout Sessions

# Purpose of Breakout Sessions

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**Breakout Sessions are a great way to have a large group of attendees divide up into smaller groups during a WebEx Meeting.**

- It's easier to have engaging discussions when you have smaller groups broken out from the larger general attendance
- Attendees can build and strengthen relationships with one another in smaller group settings
- If desired, you can have Breakout Sessions discussing one topic in smaller groups, or you can have several Breakout Sessions with several different topics being discussed simultaneously
- Can you think of any other reasons to use Breakout Sessions?

# Quick Facts about WebEx Breakout Sessions

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- **How many WebEx Breakout Sessions can you make?**
  - The maximum number of Breakout Sessions is 100!
  - This is a lot of possibility - we recommend making the number that you need to keep it manageable
- **Can you rename Breakout Sessions?**
  - Yes! In the Breakout Sessions menu, you can edit these before and after launching Breakout Sessions themselves.
- **Can you add more Breakout Sessions once they're launched?**
  - No! Once you enable Breakout Sessions, you cannot add additional Sessions to the list.
- **Does it take a lot of time to set up Breakout Sessions?**
  - It can take 5-10 minutes to set these up, especially if you're new to the process. Set aside time to do this!

# Breakout Sessions - Before Your Meeting

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## Things to consider if you plan to use Breakout Sessions:

- It is a good idea to ask for attendees to RSVP so you can anticipate several aspects of the meeting, including how many facilitators you may need to help you
- Monitor how many are RSVPing for your event
  - Most likely not all will show up, but it's better to be prepared for everyone who said they're planning to come!
- What kind of experience do you want attendees to have?
  - Are you planning for attendees to have similar experiences, but just in smaller groups?
  - Are the Breakout Sessions intended to be on different subjects altogether?
  - Will Breakouts be facilitated discussions?

# Breakout Sessions - Before Your Meeting

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## Things to consider if you plan to use Breakout Sessions:

- How many people do you have helping you facilitate the meeting and for each Breakout Session?
  - What kind of ratio do you need?
  - Have you coordinated with those facilitators?
- How long will your Breakout Sessions last?
  - This will determine if and how many times a reminder can be sent to everyone in Breakout Session
  - Examples:
    - Breakouts are 10 minutes long, send your reminder at 7 minutes
    - Breakouts are 30 minutes long, send a reminder at 15 minutes and then again at 25 minutes

# Breakout Sessions - Before Your Meeting

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## Things to consider if you plan to use Breakout Sessions:

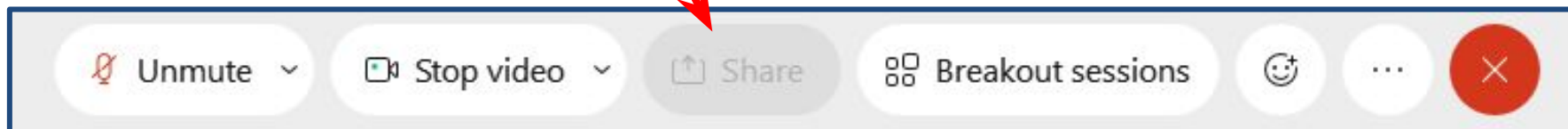
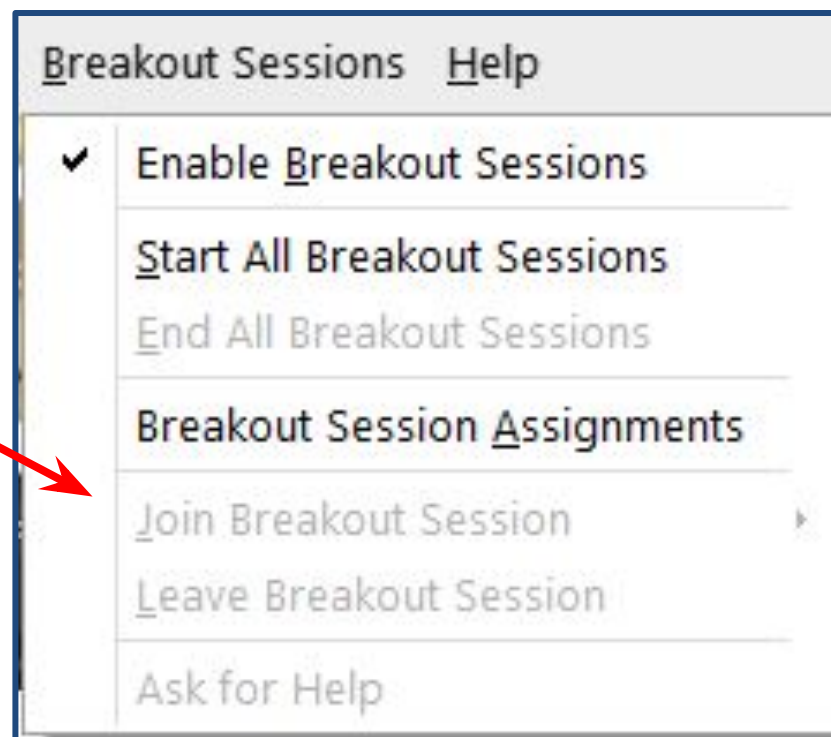
- **ONE PERSON can open the Breakout Sessions menu at a time!**
  - Coordinate in advance with meeting facilitators to have a primary (and perhaps a secondary) person to manage the Breakout Sessions menu
  - This is a great role for meeting Co-Hosts!
- **Do you need a “Circulator” for your Meeting?**
  - e.g. someone who can move from the Main Room to Breakout Sessions independently to check in on attendees?
  - This can be especially helpful for longer Breakout sessions
    - We encourage having a meeting Co-Host who has a role as your Meeting Circulator for meetings with extended Breakout Sessions (15 minutes or more)



# Launching Breakout Sessions

As a Host or Co-Host, you will see a new menu for Breakout Sessions appear in the Menu Bar, as well as in the bottom Button Panel

 Are features greyed out? Consider what your WebEx Role is and whether you need to change your permissions in the meeting!



# Launching Breakout Sessions

Breakout session assignments

Number of breakout sessions: 1

Participants per session: 1

Assign participants automatically

Assign participants manually

Let participants choose any session

Create Assignments Cancel

**Automatic Assignments:** This will split your whole group of attendees into the number of groups you decide

**Manual Assignments:** This will split your whole group of attendees into the number of groups decided, and you will be able to determine which attendees go into which assigned groups

**Participants Choose:** This will allow participants to assign themselves to Breakout Sessions independently.

# Launching Breakout Sessions

The Settings menu for Breakout Sessions can be found here:

- Do you want attendees to be able to return to the Main Meeting?
- Do you want attendees to be able to delay joining Breakout Sessions?
- How long do you want your Breakout Sessions to last?
- Do you want attendees to have additional notice time before rejoining the Main Room?

Breakout session assignments

Not assigned (7)

Search

Beth Landry [Sweden; W...  
Cohost, me

KF  
Host

Breakout sessions (4)

+ Add Session

Breakout session 2 (0)

Breakout session 3 (0)

Work Group 01 (0)

Allow attendees to return to the main meeting

Allow attendees to join session later

Automatically end breakout sessions after:

30 minutes

When sessions end, give participants more time before returning to main meeting

Set countdown timer: 60 seconds

Settings Reset Start breakout sessions

# Launching Breakout Sessions

Attendees can opt to join Breakout Sessions at the start or later:

This screenshot shows a notification and a main interface for breakout sessions. The notification at the top right states, "You're assigned to the **Breakout Session 1** session." with a blue "Join" button. The main interface has the heading "Breakout sessions have started" and the text: "You're assigned to the **Breakout Session 1** session. You can join now, or you can join later from the participants list or the **More options** menu." Below this text are two buttons: "Join now" (blue) and "Join later" (grey).

In the Breakout Sessions assignments screen, you will also see those waiting to be admitted from the lobby - however, they will be greyed out prior to being admitted to the meeting

This screenshot shows a participant list titled "Not assigned (2)" with "Selected: 1". It includes a search bar and two entries. The first entry, "Beth Landry [Sweden; W...]", is selected with a blue checkmark and has a "Host, me" label. The second entry, "Beth", is greyed out and has an "In lobby" label. This second entry is circled in red.

# Sharing Content in Breakout Sessions

---

**The Presenter Role and Sharing Content in Breakout Sessions is different than in meetings not launched into Breakout Sessions.**

- **Obtaining the Presenter Role:**
  - A Breakout Session “Ball” appears once Breakout Sessions are launched and at least one attendee joins the Session.
  - Ensure one of your Meeting’s Co-Hosts is in **each** Breakout Session where content will need to be shared so they can obtain or assign the Presenter Ball as needed.
- **Content Shareable:**
  - A Presenter can share their screen and applications during Breakout Sessions
  - It is **NOT possible** in Breakout Sessions to share static files e.g. PDFs. It is also **NOT possible** to load static files prior to Breakout Sessions and later share the file once Sessions are launched.

# Sharing Content in Breakout Sessions

**Reviewing the Presenter Role in all of the launched Breakout Sessions takes place from the Breakout Sessions assignments menu.**

From **the view of the Meeting's Host**, we are looking at the Breakout Sessions assignments window and can see three meeting attendees. We, as the host, are assigned to Breakout Session 1 but not located there and in gray.

In Breakout Sessions 2 and 3, there is one attendee in each, and both attendees have the Presenter Ball. **The attendee in Breakout Room 3 is one of this Meeting's Co-Hosts.**

For efficiency of your meetings, **delegate a Meeting Co-Host to each Breakout Session where content needs to be shared** so the Co-Host can either assume the Presenter role, or assign the Presenter Ball to another participant in the Breakout Session.

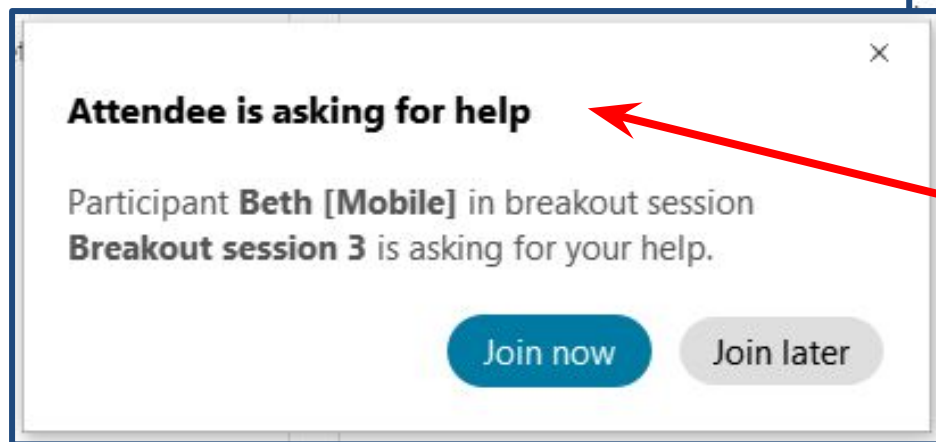
**Breakout sessions (5)** ...

- Breakout session 1 (1) Join
  - Beth Landry [WebEx Team; Sweden] BS  
Host, me, not in session
- Breakout session 2 (1) Join
  - \*Beth [Mobile]
- Breakout session 3 (1) Join
  - Beth Landry BL  
Cohost
- Breakout session 4 (0) Join
- Breakout session 5 (0) Join

# Answering Help Requests in Breakout Sessions

While attendees are in their respective Breakout Sessions, they can request help from meeting facilitators.

What the Meeting's Host Sees:



A Pop-Up window will appear for **ONLY** the Meeting's Host that an attendee is asking for Help.

The speech bubble with a question mark inside will appear next to the participant's name on the Participant List.

The Host will most likely be busy managing the meeting, so delegating help to the attendee from a Co-Host might be a possibility.

**Let attendees know at the start of the meeting they can press the button for help if they need it!**

# Sending Broadcasts to Breakout Sessions

## Sending an announcement to all meeting attendees:

- **The meeting's Host** has the ability to send a broadcast to all attendees in Breakout Sessions, depending on the context of the meeting and Breakout Sessions themselves

**Broadcast to:**

Breakout Session 1

All participants

This is a sample broadcast message to all participants in Breakout Session 1.

**Choose to send your Broadcast to:**

- “All Participants”
- “All Co-Hosts and Presenters”

Send Cancel

DEMOCRATS ABROAD

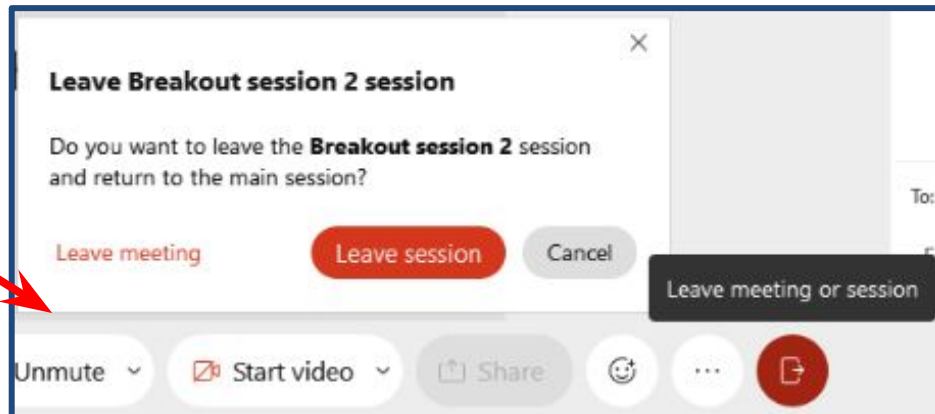
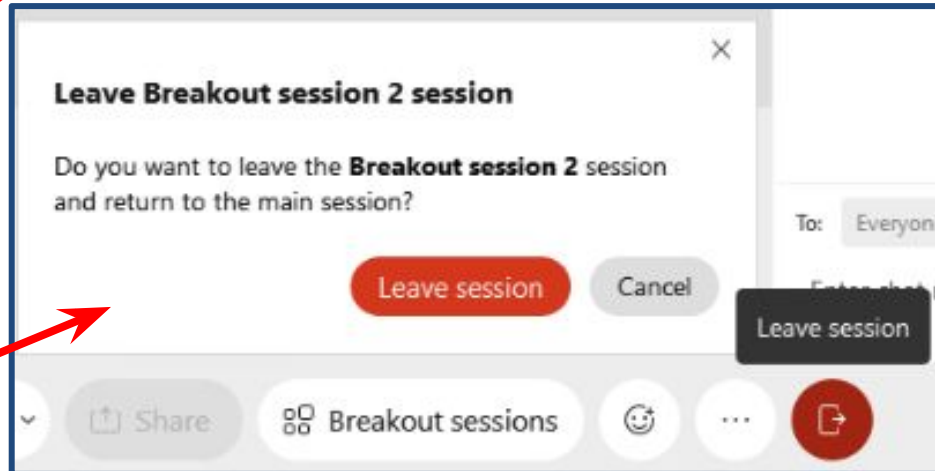
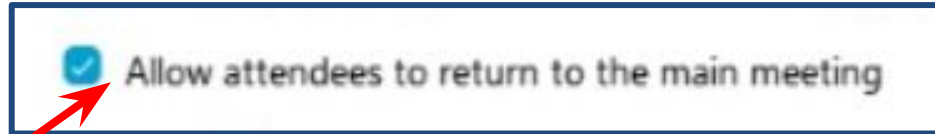


# Leaving Breakout Sessions Early

Meeting attendees can leave Breakout Sessions early, and they can return to the Main Room if that option is selected in the Breakout Session assignments menu.

The Red X Button turns into a Door button when attendees are in a Breakout Session.

- Option from the Breakout Session Assignments window (in the “Settings” section) letting attendees return to the Main Room
- What the Host and Co-Hosts see if they click on the Door button to leave the Breakout Session.
- What participants see when they click on the Door button to leave the Breakout Session.



# Ending Breakout Sessions

Once you've given attendees due warning of breakouts ending:

- End the Breakout Sessions by using one of these menus:

The image shows two screenshots from the Zoom interface. The left screenshot shows the 'Breakout Sessions' menu with 'End All Breakout Sessions' highlighted in a red box. A red arrow points from this menu item to the 'End all breakout sessions' button in the right screenshot. The right screenshot shows a toolbar with 'Settings', 'Broadcast', and 'End all breakout sessions' buttons. A red arrow points from the 'End all breakout sessions' button to a confirmation dialog box. The dialog box has the title 'End all breakout sessions' and the text 'Do you want to end all breakout sessions? All participants will return to the main meeting.' with 'End sessions' and 'Cancel' buttons. A red arrow points from the dialog box back to the 'End all breakout sessions' button in the toolbar.

Then confirm your choice when the pop-up menu appears on your screen

# Main Plenary After Ending Breakout Sessions

---

## Once your attendees have re-joined the Main Room:

- Incorporate into your meeting agenda a minute or two to give time for attendees to rejoin to the Main Room
- Take a moment to welcome attendees back and make sure everyone was able to rejoin the Main Room
  - Depending on the number of attendees, this might be easiest completed by checking the number of returned participants
- Returning attendees may have had their cameras on and mics unmuted in a Breakout Session, but wish to adjust their settings upon returning to the Main Room
- It is a good idea to **remind returning attendees to review the status of their cameras and microphones**, for example to mute their microphone again and/or turn their camera off.

# Re-Launching Breakout Sessions in Meetings

## Want to re-launch Breakout Sessions again during the same meeting?

If during your meeting you wish to have more than one set of launched Breakout Sessions, you can return to the Breakout Sessions assignment menu and re-launch Breakouts.

## Helpful Hint! The number and names of Breakout Sessions will remain intact from the first set of launched Sessions!

- Unless you **RESET** your Breakout Session settings, you can re-use the same number and names from before.
- On the initial launch of Breakout Sessions, you may wish to go ahead and set up the number and names of ALL Breakout Sessions you wish to use in advance for one less step in set-up.
- Keep these things in mind when determining if you are planning to use automatic, manual, or self-assigned Breakout Sessions.



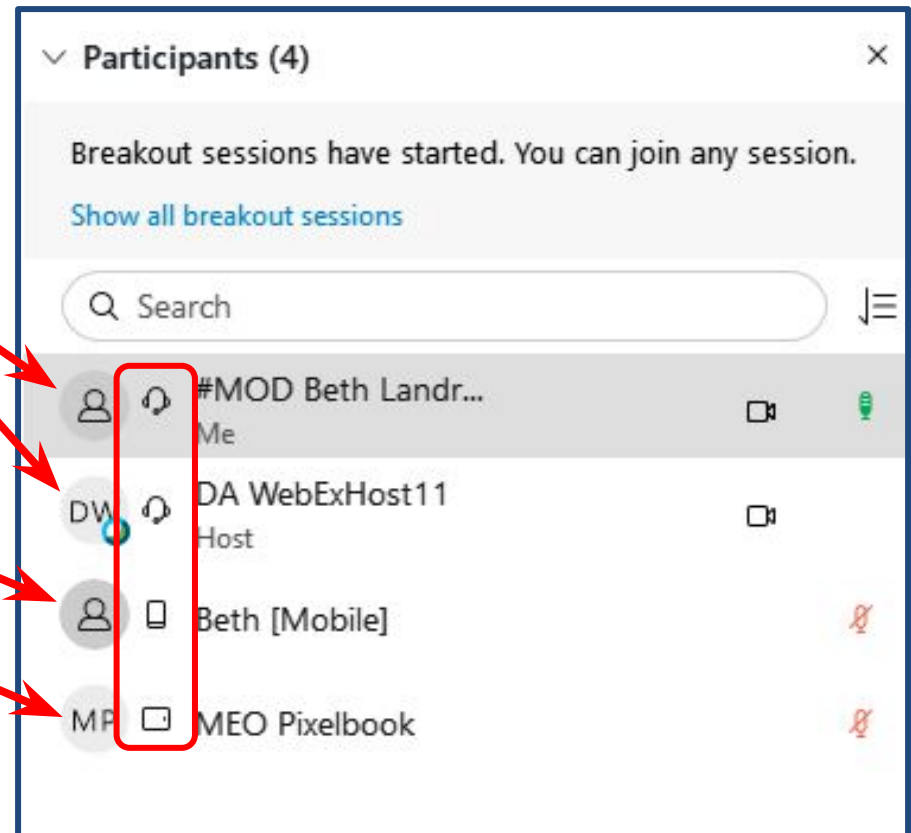
Reset Menu Button located in the Breakout Session Assignments menu during unlaunched Breakouts. This space is later occupied by the **Broadcast function** with launched Breakout Sessions.

# Breakout Sessions - Attendees with Other Devices

## What do we mean by “other devices”?

- You might have attendees join your meeting who join using a smartphone, tablet, etc.
- These attendees might need additional assistance participating in your meeting that utilizes Breakout Sessions depending on their device

- These attendees are connected with a laptop or computer (headset icon)
- This attendee is connected on a smartphone
- This attendee is connected on a tablet, Chromebook, or similar device



# Q's: Breakout Sessions

---

Q: What can you monitor to help decide how many Breakout Sessions to have?

Q: What are the 3 types of Breakout Session assignments?

Q: Which WebEx roles can independently navigate to all Breakout Sessions?

Q: How can you notify attendees Breakout Sessions will soon close?

# A's: Breakout Sessions

---

Q: What can you monitor to help decide how many Breakout Sessions to have?

A: Set your event up to receive, and then monitor, RSVP numbers.

Q: What are the 3 types of Breakout Session assignments?

A: Automatic, Manual, and Participant-Chosen.

Q: Which WebEx roles can independently navigate to all Breakout Sessions?

A: Hosts and Co-Hosts can independently navigate to all Breakouts.

Q: How can you notify attendees Breakout Sessions will soon close?

A: The meeting's Host can send a Broadcast message to all attendees in Breakout Sessions a short time before sessions are to close.



# Webinar Event Meetings



# WebEx Meetings as Webinars

---

## A Webinar is a WebEx Meeting with:

- Selected Panelists or a VIP Guest Speaker,
- Presenting to a larger limited-participation audience.

## A Webinar may:

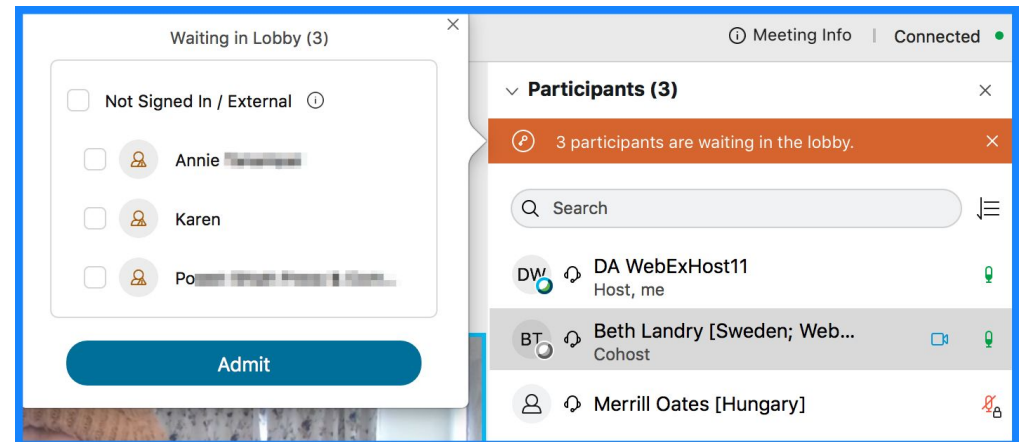
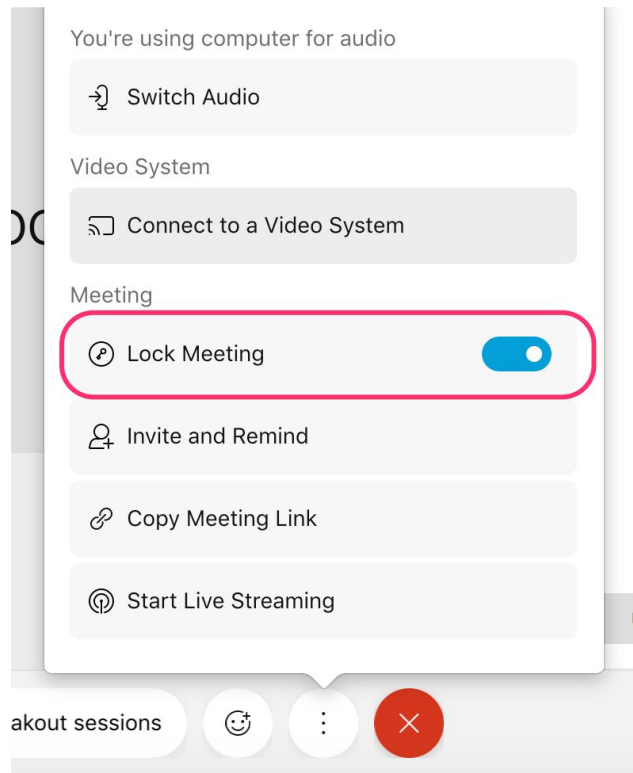
- Limit the ability to view All Participants, and Mute all Participants
- Limit Chat messages to only Host and Presenter
- Select a Grid, Stage, or Focused Video layout for the recording
- Indicate that a Webinar setup template be applied to create the Webinar-type event

## Meeting Host **MUST** notify the DA WebEx Team to create a Webinar.

- When scheduling an event, the Host must notify the WebEx Team and request a Webinar-specific setup for the meeting.

# Lock Meeting Prior to Public Start

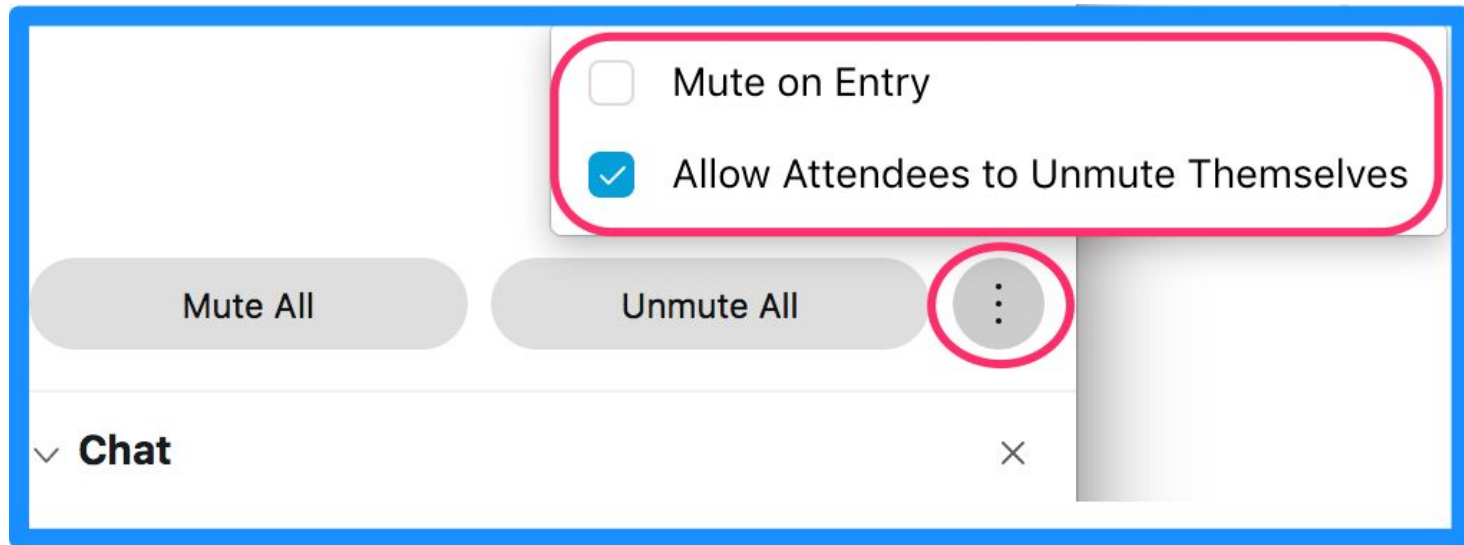
## Admit Guest Panelists Early and Lock Meeting



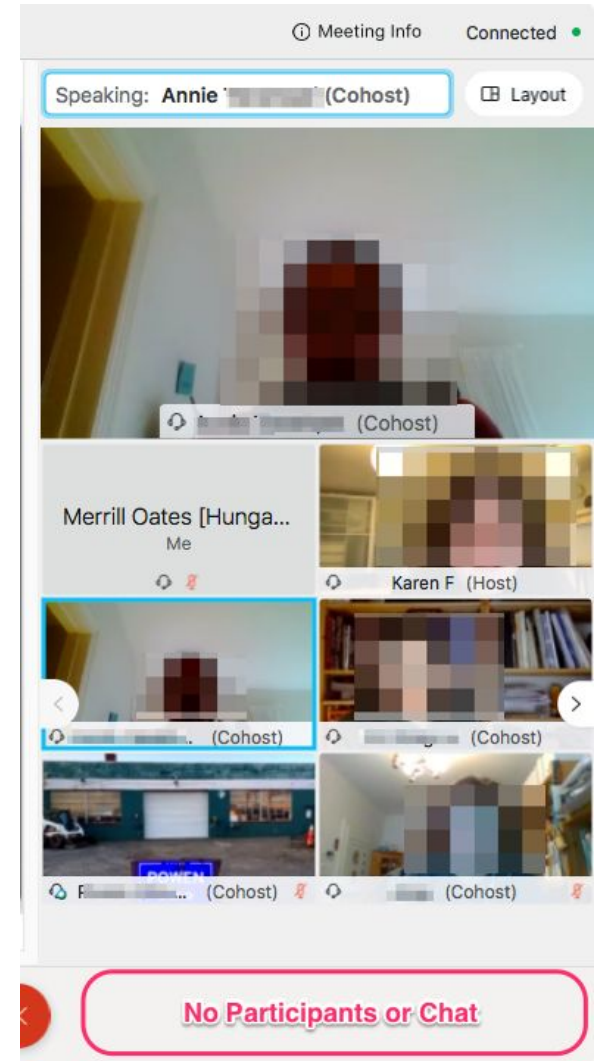
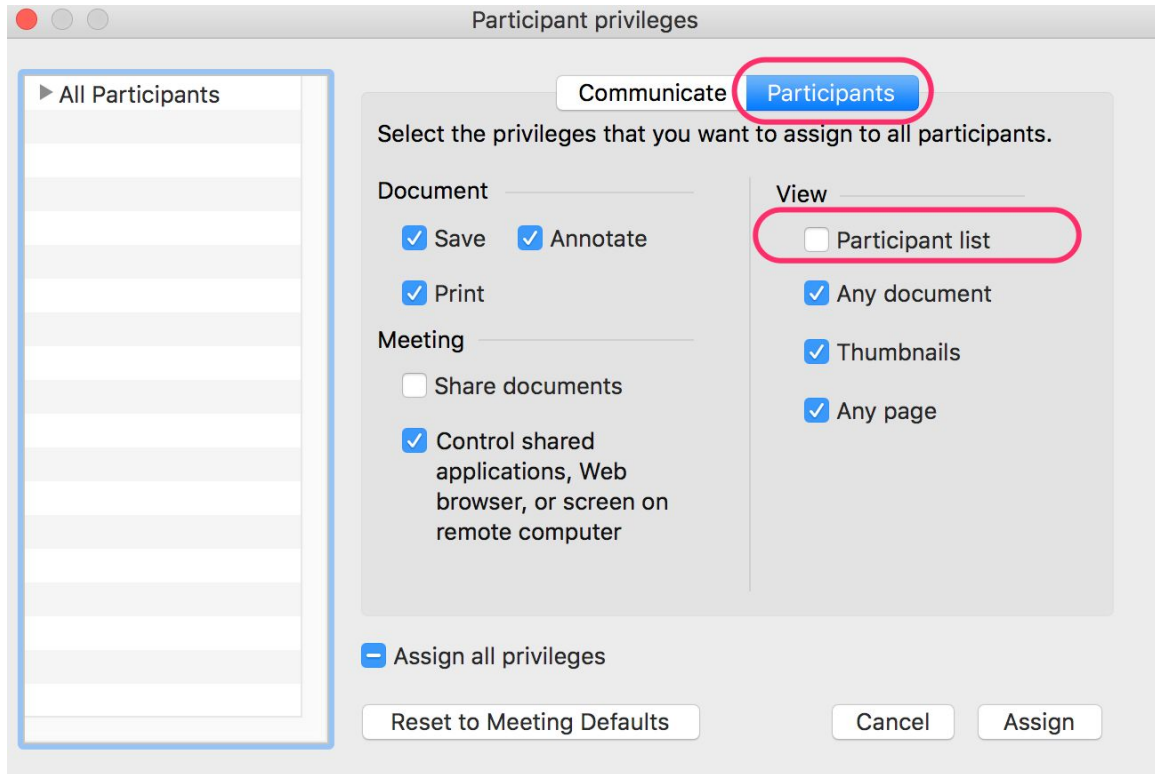
# Set Mute On Entry and Disallow UnMute

If Guest Speaker or Panelists are presenting to a large audience,  
You may wish to set:

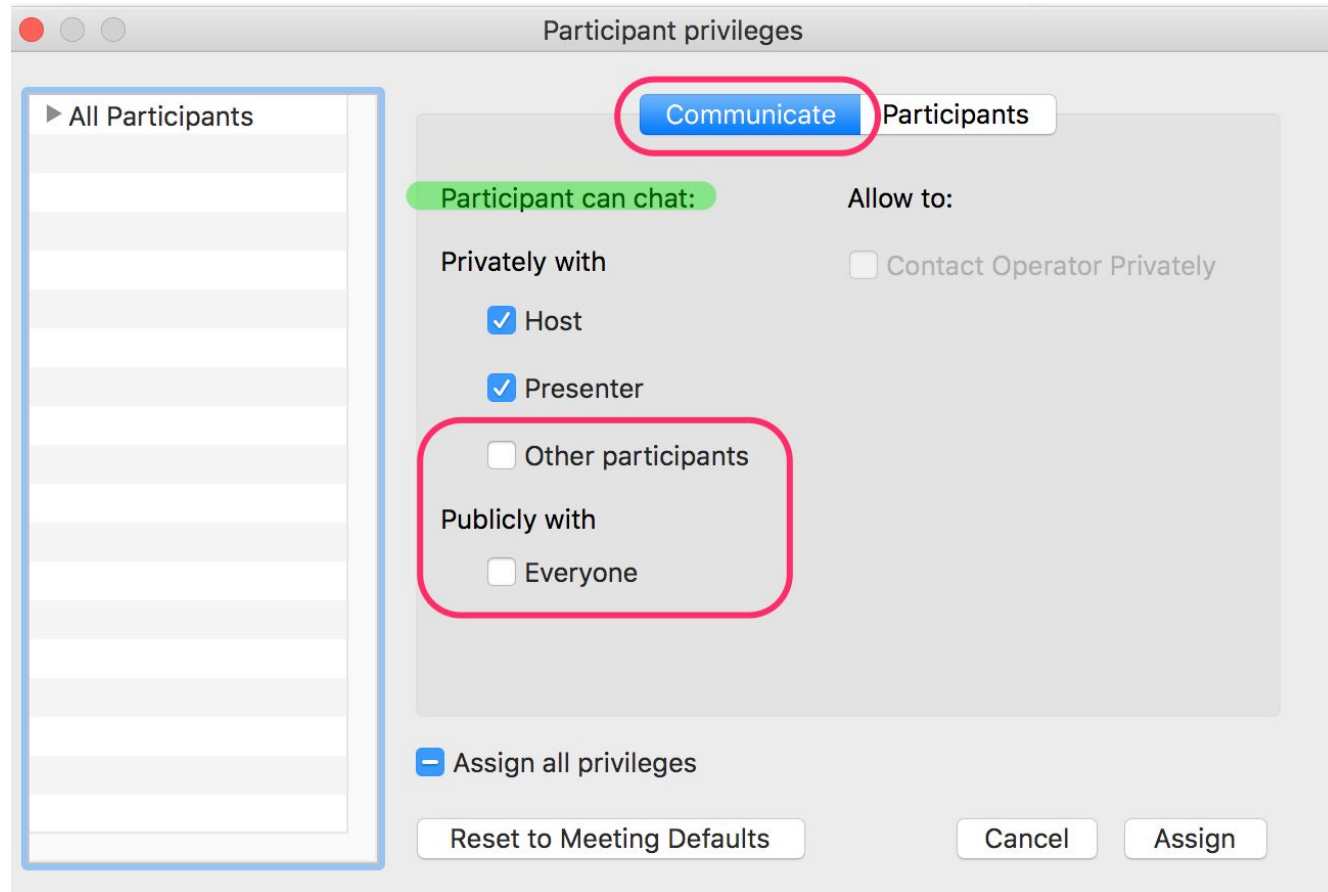
- ❖ Mute on Entry
- ❖ Prevent participants from Unmuting themselves



# Assign Meeting Privileges - Participants Menu



# Assigning Meeting Privileges - Participant Menu



# Webinar Video Recording Layout Options

Notify the WebEx Team in advance of your Recording Layout preferences.

- ❖ **Grid** layout is the default.
- ❖ **Stage** or **Focused** may be more suitable for a guest speaker
- ❖ Recording preferences **cannot** be changed in the meeting.

The screenshot shows the 'Recording' tab in the WebEx Preferences window. It includes sections for 'Recording transcripts' and 'Recording layout'. The 'Recording layout' section is divided into two scenarios: 'When the meeting has shared content' and 'When the meeting has no shared content'. In the 'shared content' section, the 'Stage' option is selected, and the 'Focused content with active speaker' option is highlighted with a red box. In the 'no shared content' section, the 'Grid' option is selected, and the 'Stage' option is highlighted with a red box.

This diagram provides a detailed view of the recording layout options. It is organized into two main sections: 'When the meeting has shared content' and 'When the meeting has no shared content'. Each section contains three layout options: 'Stage', 'Focused content with active speaker', and 'Focused content (no participant video is recorded)'. The 'Stage' option in the 'no shared content' section is highlighted with a green box, while the 'Stage' option in the 'shared content' section is highlighted with a red box. The 'Grid' option in the 'no shared content' section is also highlighted with a green box.



# Live-Streaming WebEx Meetings

# Live-Streaming DA WebEx Meetings

## WebEx can now Live-Stream to Social Media

**LIVE**

WebEx now offers the capability of sending a real-time Live-Stream feed of your meeting to Social Media channels like:

- Facebook Live
- YouTube
- Twitter
- Vimeo



## What is required?

You will need full editor access to the destination Social Media account and provide the

- Target Stream Link and Stream Key

**Other streaming service information**

To learn how to find this information for your service, see <https://www.cisco.com/go/webex-live-stream>.

**Streaming service** (example: YouTube Live)

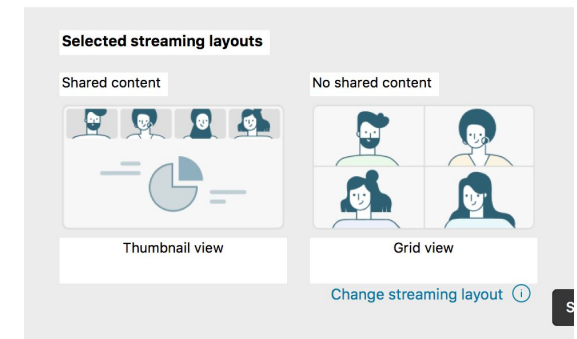
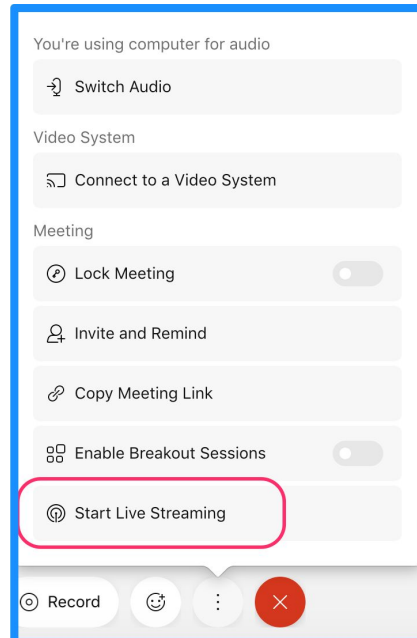
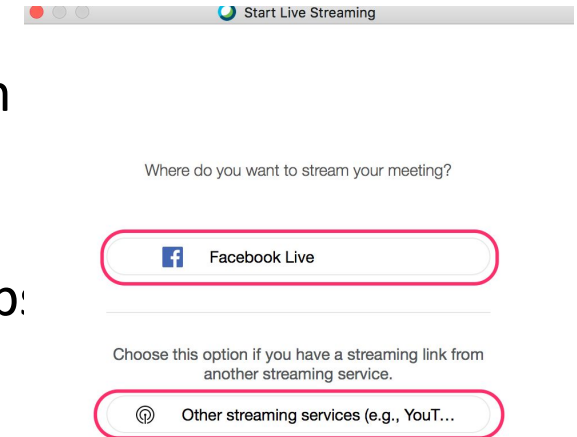
  
**Target stream link**  
**Target stream key** (optional)



# Live-Streaming Prep w/ WebEx Team

## Advance Coordination with DA WebEx Team

- Live-Streaming from WebEx can only be setup with WebEx Host Admin Accounts
- Currently working with DA Comms & Caucus Group: streaming solution
- **Notify the DA WebEx Team in advance to plan for event.**





# Combined In-Person & Remote Meetings

# Combined In-Person & Remote Meetings

---

**WebEx can be used to facilitate meetings that combine both In-Person/On-Site participation with individuals who are also joining remotely – from across town, or around the globe**

- A key priority is to ensure that all attendees, both in-person and those attending remotely, can hear and interact with one another – as if everyone were in the same room
- Combined in-person and remotely attended meetings require additional needs and advance preparation
- Including:
  - technical preparation
  - venue coordination
  - moderator training and coordination

# Combined In-Person & Remote Meetings

## Attendance Hall Combined Meeting:

- Combined In-Person meeting room with remote participants joining online.
- Objective is to ensure that remote participants can fully participate with two-way audio and video connection with the room.
- Requires advance setup of technical equipment to integrate microphones, speakers, webcams, projectors, computers, and Internet connections
- Requires active Moderators to monitor the Chat, provide support for remote participants, and to keep the room and remote participants in sync.



# Combined In-Person & Remote Meetings

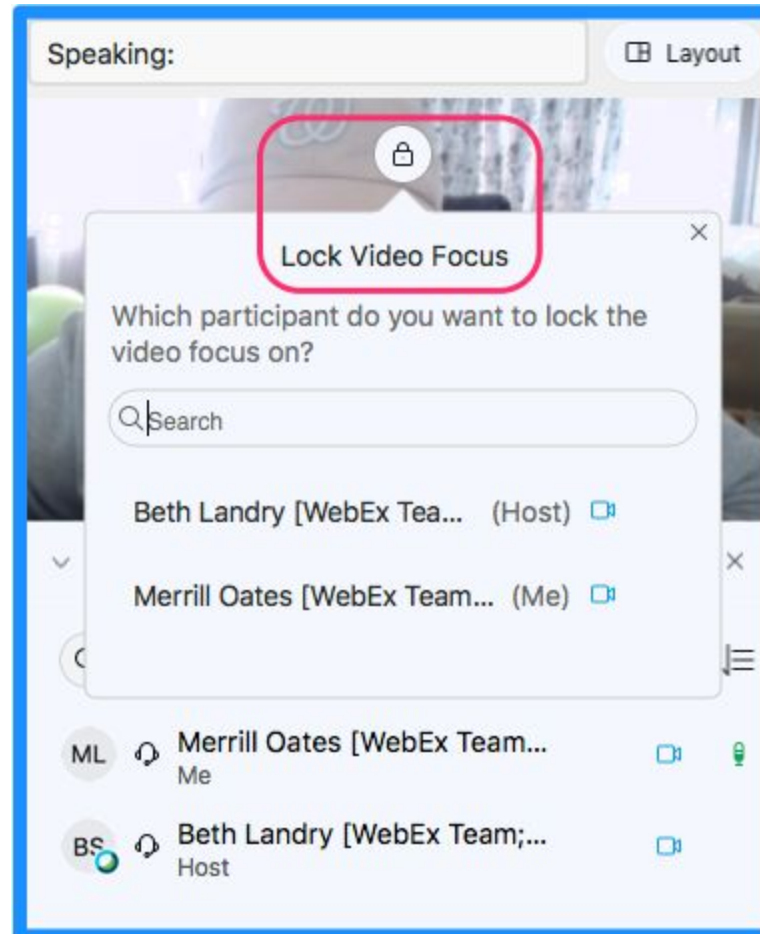
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## Checklist for Advance Meeting Preparation

- ✓ Review *In-room Moderator Tips & Guidance* in DA Wiki  
<https://wiki.democratsabroad.org/display/WebEx/In-room+Moderator+Tips+and+Guidance>
- ✓ Confirm In-room Internet capacity (WiFi and UTP cables)
- ✓ A designated Host computer to **anchor** meetings at all times
- ✓ Additional on-site computers for Web-cams, Podium, Projector, and stationed Moderators
- ✓ Audio and Video set-up, including: soundboard, projector, podium and roving mics, tripods, and connection cables
- ✓ Electrical outlets for all devices and In-person participants
- ✓ Sandbox testing sessions for all connections with both in-person attendees and remote participants

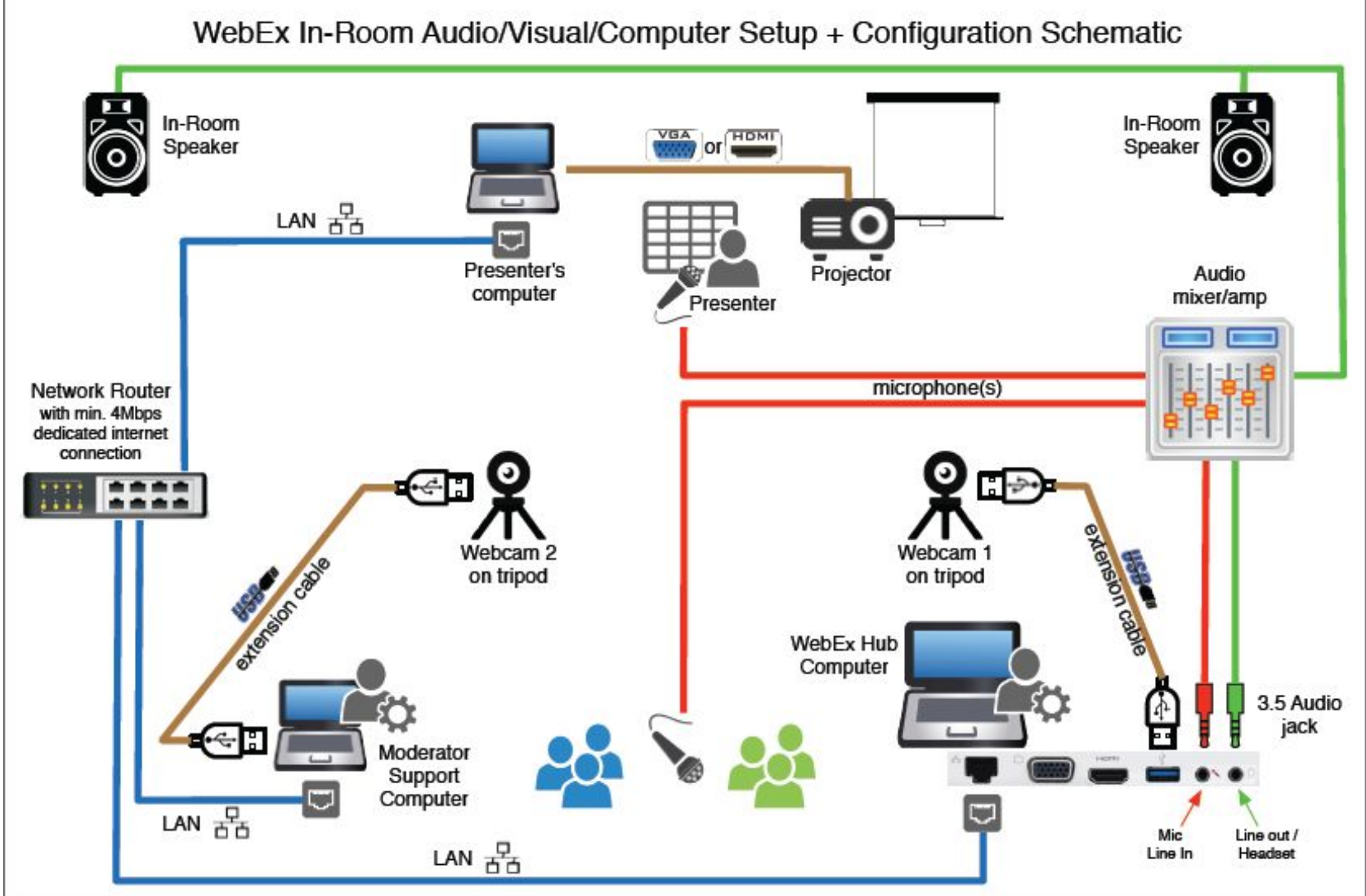
# Lock Video Focus - In-Room Speaker

- Default Video Focus automatically changes to the Active Speaker
- You may need to set focus to Front of Room Speaker
- During meeting breaks can be useful to focus on in-room for remote participants



# DA WebEx In-Room A/V/PC Setup

## Schematic Lavout: Audio/Visual /Web-Cam & PC





# Posting Meetings to Hosted Sites



# Posting Meetings to Hosted Sites

---

## Streaming Recording vs. Downloadable MP4 Video file

WebEx meeting recordings are typically provided as a Streaming link from the WebEx recording archive.

- On special request, the WebEx Team can provide an exported MP4 video file for personal archiving, or for
- Posting to the Websites, Facebook, YouTube, Vimeo...

## Submit request to DA WebEx Team

<https://wiki.democratsabroad.org/display/WebEx/Meeting+Change+or+Recording+Request+Form>

- Request an MP4 download file

## Planning Ahead

- Sandbox Sessions
- Time Management & Agendas
  - Guest Speakers
- When to Contact the DA WebEx Team

# Getting Prepared with a Sandbox Session

---

**Are you getting ready for a complex meeting e.g. Webinar?**

**Set up a Sandbox to make sure you have everything ready!**

- Schedule a Sandbox Session in the meeting request scheduling form
- Schedule the Sandbox in enough advance to ensure meeting materials, website links, meeting event page, etc. are as needed

**What are suggested items to complete during a Sandbox Session?**

- Test loading files and sharing applications/screens
- Practice changing facilitator roles and managing the chat
- Practice maneuvering within and launching Breakout Sessions
- Build WebEx Polls in advance
- Practice a demo Webinar or Livestreamed meeting
- Practice Back-End Communication with meeting facilitators
- **Have peer facilitators join you to make sure everyone is able to carry out their roles when the meeting time comes!**

# Time Management & Agendas

---

**Are you getting ready for a complex meeting e.g. Webinar?**

**Set up your meeting agenda in advance and share with your team!**

- You may want to have an “official” agenda as well as a more detailed “facilitator agenda” e.g. time-blocked meeting management
- Review your entire meeting agenda and divide up the time based on elements within the meeting
- Build in extra time to allow for longer than foreseen setup, discussions, and within-meeting changes
- Coordinate with all facilitators and speakers for each segment’s length of time
-

# Prepare with Backup Plans!

---

**Are you getting ready for a complex meeting e.g. Webinar?**

**Have a backup plan for last-minute changes and the unexpected!**

- Plan for how you want the meeting to go, as well as for what to do if something doesn't go as planned!
  - What will you do if:
    - Your Moderator can't change their name?
    - You have to rearrange the agenda during the meeting?
    - One or more facilitators can't join?
    - The meeting's Host, Co-Hosts, Presenter get kicked offline or has an emergency?
    - The planned presentation doesn't load?
    - Your device's battery dies?
    - More attendees show up than you planned?
    - You have a meeting participant trolling the meeting?

# Hosting & Supporting Guest Speakers

---

**Are you getting ready for a complex meeting e.g. Webinar?  
Ensure your guest speakers are ready!**

- Taped guest speakers:
  - Ensure the video works properly for sharing and for attendees
- Live guest speakers:
  - Declare a point person for coordinating with the guest speaker
  - Ensure your speaker is able to load WebEx to join you, and **testing of your speaker's devices and connection in advance is crucial**
  - Provide the speaker with all pertinent meeting information, including the link, meeting number, and the back-up dial-in number to join
  - Who will be managing the speaker's presentation (if not them)?

# When to Consult the DA WebEx Team

---

## When **MUST** you contact the DA WebEx Team?

- Requesting a meeting recording streaming link ([FORM](#))
- Requesting a meeting change or cancellation ([FORM](#))
- Signing up to attend DA WebEx Training ([FORM](#))
- If you have a meeting to schedule **longer than 4 hours**
- If you are **setting up a Webinar** and need meeting settings adjusted
- If you are planning to **livestream your meeting**
- If you are **not able to schedule a meeting** or **cannot access your scheduled meeting**

## When **SHOULD** you contact the DA WebEx Team?

- Ask us to participate in a Sandbox session with you to troubleshoot a problem you might be having!
- When planning a larger meeting with special needs, or a combined In-Person/Remote meeting

# Q's: Live-Streaming & Planning Ahead

---

Q: What email title should you use to request Webinar settings?

Q: Which preparation tactic will help ensure a larger and more complex meeting, such as a combined in-person and remote meeting, takes place smoothly?

Q: What are some of the special settings used for Webinars?

Q: For combined meetings, a designated Host computer is needed to \_\_\_\_\_ at all times.



# Q's: Livestreaming, Hosted Sites, & Planning Ahead

---

Q: What email title should you use to request Webinar settings?

A: "Time Sensitive: Webinar Request for Meeting # \_\_\_\_\_"

Q: Which preparation tactic will help ensure a larger and more complex meeting, such as a combined in-person and remote meeting, takes place smoothly?

A: A Sandbox Session - which may be an actual event

Q: What are some of the special settings used for Webinars?

A: Some of these include: audio and video settings for participants, chat functionality, who can see the participant list, etc.

Q: For combined meetings, a designated Host computer is needed to \_\_\_\_\_ at all times.

A: Anchor meetings.



# Managing WebEx Polls

# Managing WebEx Polls

---

**During your meeting, you can open Polls for participants to answer questions.**

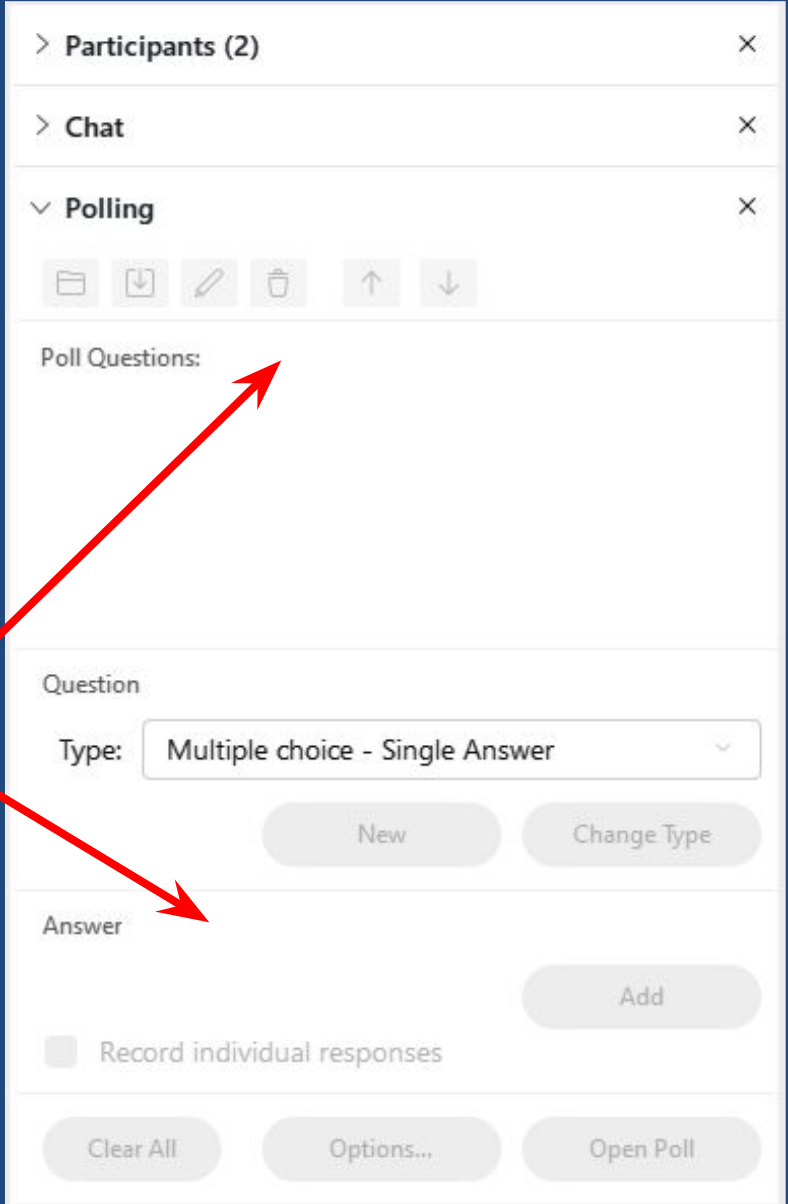
- **Step 1:** Enable the Polling Panel, if it is not already enabled
- **Step 2:** Where the Participant List and Chat Box menus are nested, the additional Polling Panel can be opened and the process of taking a Poll started.
- **Step 3:**
  - **Method A:** The Presenter can build a Poll during a meeting, or in the pre-meeting, prior to attendees joining.
  - **Method B:** A meeting facilitator can also set up a Sandbox Session well in advance of the meeting to build one or more Polls within WebEx, and save the Poll files for future use. The Poll can then be loaded when appropriate in the meeting.

# Managing WebEx Polls

**WebEx Polls are shared content, and connected to the Presenter Role!**



The meeting's Host will be able to view the interacting with and managing the Poll itself inaccessible.

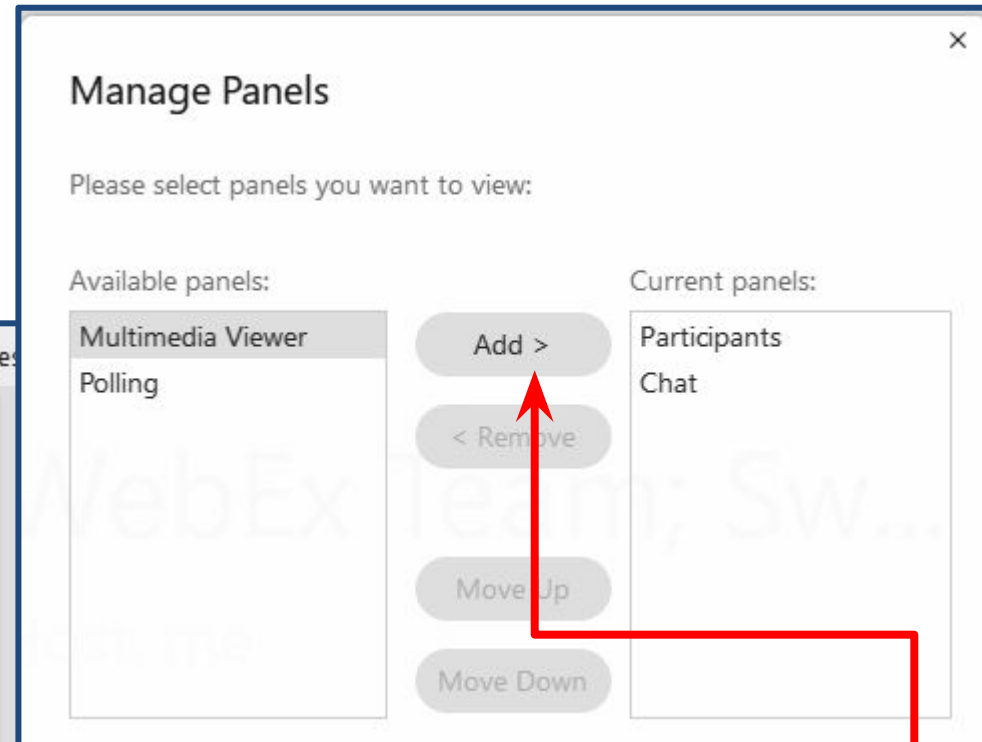
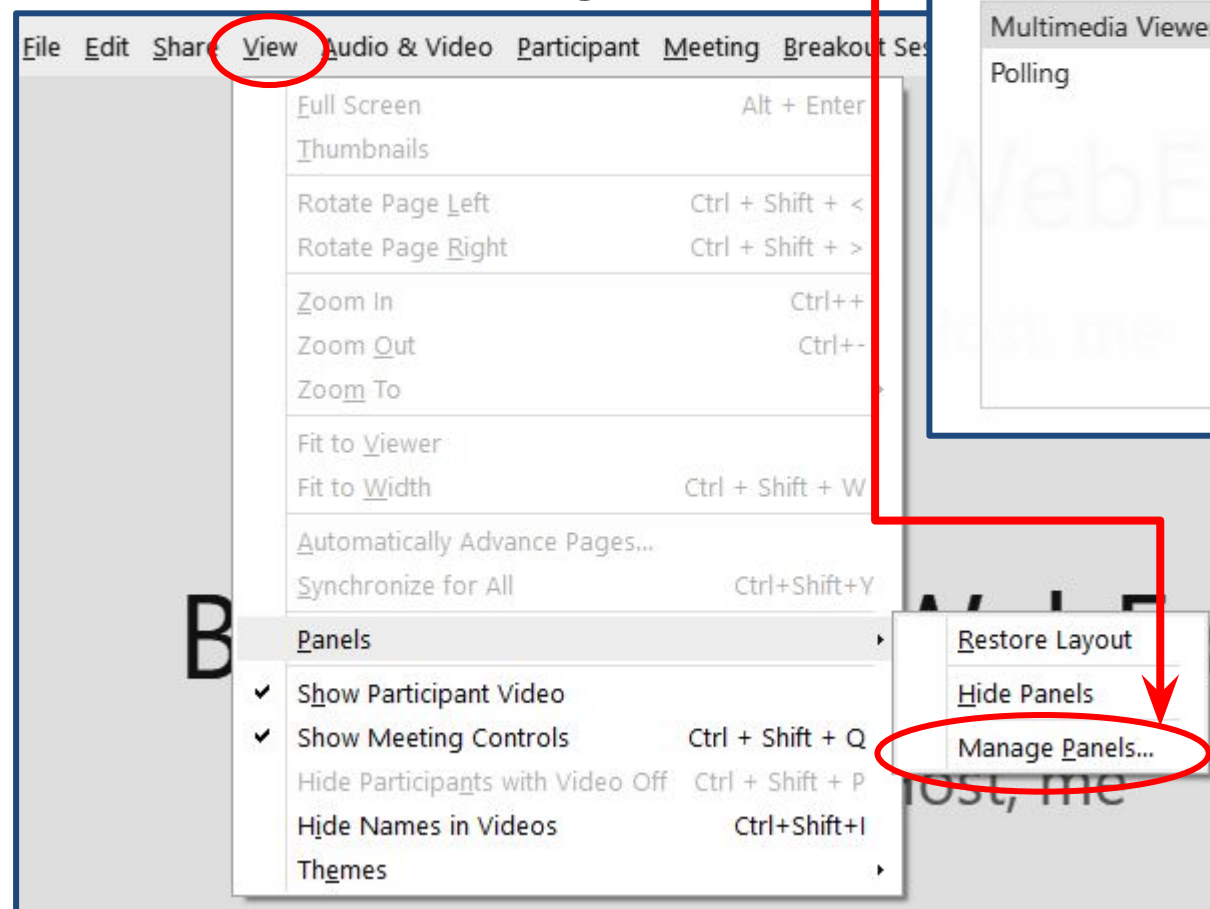


The screenshot shows the WebEx interface for managing polls. At the top, there are tabs for 'Participants (2)', 'Chat', and 'Polling'. The 'Polling' tab is active and expanded, showing a toolbar with icons for adding, downloading, editing, deleting, and navigating. Below the toolbar, the 'Poll Questions:' section is visible. The 'Question' section includes a 'Type:' dropdown menu set to 'Multiple choice - Single Answer', with 'New' and 'Change Type' buttons. The 'Answer' section has an 'Add' button. At the bottom, there are 'Clear All', 'Options...', and 'Open Poll' buttons. A red arrow points from the text 'interacting with and managing the Poll itself inaccessible' to the 'Polling' tab and its content.

# Managing WebEx Polls - Step 1

The panel for polls must be opened to use for participants.

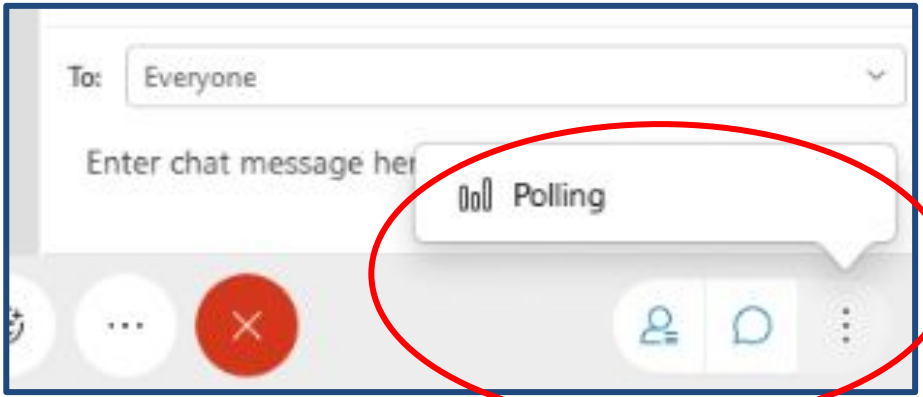
1. Under the View menu, navigate to Panels, and then **Manage Panels**.



2. Click on “Polling” then ADD from Available Panels to Current Panels and then click OK

# Managing WebEx Polls - Step 2

With the Poll Panel activated, select the "More" button to start managing your Poll:



Left to Right:  
Open, Save, Edit, Delete, and Move Up/Move Down

A screenshot of the WebEx Polling management interface. At the top, there is a 'Polling' header with a dropdown arrow and a close button. Below the header is a toolbar with six icons: a folder icon, a download icon, a pencil icon, a trash can icon, an upward arrow icon, and a downward arrow icon. This toolbar is circled in red. Below the toolbar, there are two poll questions. The first question is '1. This is Question 1.' with three radio button options: 'A. Yes', 'B. No', and 'C. Maybe'. The second question is '2. This is Question 2.' with two checkbox options: 'A. Maybe.' and 'B. Yes.'. Below the questions is a 'Question' section with a 'Type:' dropdown menu set to 'Multiple choice - Single Answer'. There are 'New' and 'Change Type' buttons. Below that is an 'Answer' section with an 'Add' button. At the bottom, there are 'Clear All', 'Options...', and 'Open Poll' buttons. A vertical scrollbar is visible on the right side of the interface.

# Managing WebEx Polls - Step 3/Method A

Determine the types of questions/answers you want:

Question

Type: Multiple choice - Single Answer

Multiple choice - Single Answer

Multiple choice - Multiple Answer

Answer

Short answer

Record individual responses

The Polling Options button sets a timer for your Poll:

Polling Options

Timer

Display

Alarm: 5.00 minutes

OK Cancel

▼ Polling

Poll Questions:

1. This is Question 1.

A. Yes

B. No

C. Maybe

2. This is Question 2.

A. Maybe.

B. Yes.

Question

Type: Multiple choice - Single Answer

New Change type

Answer

Add

Record individual responses

Clear All Options... Open Poll



**When you are ready,  
OPEN your Poll!**

# Managing WebEx Polls - Step 3/Method B

Determine the types of questions and answers you want:

A screenshot of a dropdown menu for selecting question and answer types. The menu is titled "Question" and "Answer". Under "Question", there are three options: "Multiple choice - Single Answer" (highlighted), "Multiple choice - Multiple Answer", and "Short answer". Under "Answer", there is one option: "Short answer". A checkbox labeled "Record individual responses" is at the bottom.

Save your Poll by downloading the file for future use.

If you have more than one Poll to build in advance, save the first Poll file and then "Clear All" to reset and continue making additional Polls.

A screenshot of the WebEx Polling interface. At the top, there is a "Polling" header with a close button. Below it are icons for adding, editing, deleting, and moving polls. The main area shows "Poll Questions:" with two questions. The first question is "1. This is Question 1." with three radio button options: "A. Yes", "B. No", and "C. Maybe". The second question is "2. This is Question 2." with two checkbox options: "A. Maybe." and "B. Yes.". Below the questions is a "Question" section with a "Type:" dropdown menu set to "Multiple choice - Single Answer". There are "New" and "Change type" buttons. Below that is an "Answer" section with an "Add" button. At the bottom, there are "Record individual responses" checkbox and "Clear All", "Options...", and "Open Poll" buttons.



# Managing WebEx Polls - Polling in Progress

▼ Polling

Poll in progress:

Questions

1. This is my first poll Quest...  
Yes, this is my first poll ...

2. This is my Second ...  
A. True 0/0 (0%)  
B. False 0/0 (0%)

Polling status

Not started	...	0/0 (0%)
In progress	...	0/0 (0%)
Finished	...	0/0 (0%)

Remaining time: 4:42 Time limit: 5:00

New Poll Edit Questions Close Poll

Its coming back in the Polling Panel. If you want to select "Close Poll"

LIVE RESULTS!

▼ Polling

Save icons

Click the Save Icon to Save Poll Results. If you want to edit questions or launch a new Poll, go to the button bar at the bottom of the Poll Panel. You have the option to share Poll results, including individual results, with meeting attendees.

Polling status

0 of 0 attendee has responded

Remaining time: 4:58 Time limit: 5:00

Share with attendees

Poll results

Individual results

Apply

New Poll Edit Questions Close Poll



# Facilitated Skills Practice

# Facilitated Skills Practice

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- **Skills 1**
  - Assigning another participant as Host
  - Assigning another participant as Co-Host
  - Assigning another participant as Presenter
  - Initiating the Lobby - locking a meeting
- **Skills 2**
  - Admitting/Readmitting participants from the Lobby
- **Skills 3**
  - Initiating Breakout Sessions
  - Sending a Broadcast to Breakout Session Participants
  - Ending Breakout Sessions
- **Skills 4**
  - Navigating between Main Room & Breakout Sessions

# Questions?

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It's very helpful for your DA WebEx team to receive feedback after these sessions. Please take a minute to send us your thoughts on what was good and what we can improve on:



[webex@demsabroad.eu](mailto:webex@demsabroad.eu)

**Thank you for contributing  
to the work of Democrats Abroad!**



**POST-TRAINING SLIDE DECK:  
Reference Resources & Web Links**

# Bookmark These URLs!

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- DA WebEx Host Certification Training Slides
  - <https://wiki.democratsabroad.org/display/WebEx/Host+Certification+Training+slides>
- DA Wiki Help Pages:
  - <https://wiki.democratsabroad.org/display/WebEx/WebEx+Help+Pages>
- DA WebEx Meeting Calendar:
  - <https://wiki.democratsabroad.org/display/WebEx/WebEx+Meeting+Calendar>
- DA WebEx Scheduling Form:
  - <https://wiki.democratsabroad.org/display/WebEx/WebEx+Scheduling+Form>
- Time Zone Calculators:
  - <https://www.timeanddate.com/time/map/>
  - <https://www.worldtimebuddy.com/>
- WebEx Test Meeting:
  - <https://www.webex.com/test-meeting.html#>

# Daylight Savings Time

Knowing when the clocks change can be a bit of a nightmare, especially when trying to schedule DA WebEx meetings across 2 or more time zones.

US Daylight Savings Time (DST) change dates can be from 1 to 3 weeks different from Europe or other Countries that do observe DST. You should always check your scheduling times in advance with a world time/date calendar on the web.

- **Americas**

- [United States](#), Most locations do observe DST
- (Note: [Hawaii](#), most of [Arizona](#) No DST)
- [Mexico](#) Most locations,

- **Europe**

- [United Kingdom](#), All locations
- [Germany](#), [Greece](#), Central Europe, All locations
- Europe may eliminate DST in 2020

- **AP**

- [Japan](#), All locations, No DST
- **China** - All locations, No DST
- **Australia** – Most locations do observe DST
- **New Zealand**– Most locations do observe DST

## Calendars and World Time Utilities

[www.worldtimebuddy.com](http://www.worldtimebuddy.com)

<https://www.timeanddate.com/worldclock/>

<https://www.timeanddate.com/time/dst/2019.html>

<https://www.timeanddate.com/time/dst/2020.html>

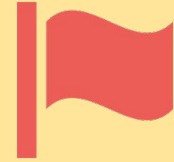
<https://www.timeanddate.com/time/dst/2021.html>

Note: DA WebEx meetings are **always** scheduled in US Eastern Time (ET or EDT)  
–Washington D.C. Local time zones are up to the Host to determine.

# Six Tips & Tricks for Video and Audio Setup

1. Run a test WebEx Session at least two hours before your scheduled meeting to give you some time to resolve audio and video issues if they come up.
2. Test your bandwidth ([www.speedof.me](http://www.speedof.me)) If you have less than 4mbps, consider limiting application sharing
3. Test your audio devices. If the speakers/headset/mic work on Skype, they will work on WebEx
4. Use a headset & mic  
(see Audio and Video Troubleshooting section)
  - USB headset or mobile phone headset with mic can work well
  - Test it before you start
5. It is NOT uncommon for the initial video and audio set up to take 15-30 minutes to complete. Setup in advance!
6. Have Skype or other text messenger app as a back channel to other participants. Do not use text Instant Messages (not audio).

[webex@demsabroad.eu](mailto:webex@demsabroad.eu)



Video takes more computing power than email or document processing.

To reduce potential problems, shut down all other programs or even restart your computer!



# Troubleshooting: WebEx Health Checker

- Identify any potential problems on your PC with Health Checker under the “Help” menu

The left screenshot displays the 'Audio & Video Statistics' window. It shows overall CPU usage at 10% and Webex CPU usage at 24.6%. Overall memory utilization is 95% (15690MB/16384MB) and Webex memory utilization is 1.6% (257MB/16384MB). Under the 'Audio & Video Connection' tab, it lists video codec as H.264 and VoIP codec as Opus. Connection ports are Audio: UDP (59636) and Video: UDP (60432). A table shows network statistics:

	Send	Receive
<b>General</b>		
Bandwidth	76 kb/s	84 kb/s
<b>Audio</b>		
Latency	50 ms	40 ms
Jitter	7 ms	1 ms
Packet loss	0%	0%
<b>Video</b>		

The right screenshot shows the main 'Health Checker' dashboard. It features a 'Meeting Quality' section with a 'Test' button and a 'System information' section with a 'Refresh' button. A status list shows: Network connection (green dot), Meeting service (green dot), Audio (green dot), Video (red dot), and Share content (dash). System information shows Total CPU usage at 100.0%, Memory utilization Total at 71%, and Webex Meetings at 2.3%. A 'Health Status' section includes a 'Problem summary' (High CPU usage may be causing some limitations for your meeting video.) and 'Actions' (Check your CPU usage. If problems persist, stop showing your video in the meeting, and then try starting it again later. Close any other applications that are open on your computer.) A 'Send Problem Report' button is at the bottom.

*Audio & Video Statistics can give you further details on any potential problem.*

# Troubleshooting: Participant Testing

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- Try to have all users (Hosts, Presenters, Participants) join a test meeting (or 2) before attempting to join a real one for the first time
- Try not to focus on one user at the expense of the rest of the meeting (where possible)
- Report any serious issues to the DA WebEx Team



**POST-TRAINING SLIDE DECK:  
Level 1 Host Training Refresher**

# Level 1 Host Training Refresher

## Things to keep in mind:

- Democrats Abroad uses WebEx differently than most other organizations
- WebEx accounts are shared between all of Democrats Abroad
- The Host must “End” their meeting or it may disrupt the next one
- Meetings must be scheduled online via the **DA WebEx Scheduling WebForm**
- Everyone - Hosts and Participants - **FIRST** log on as a Participant
  - **NO ONE LOGS ON AS HOST**
- Hosts receive 2 emails when a meeting is scheduled
  - **Participant Invitation Email:** forward to invite your Participants
  - **Host Key Email:** allows the Host to “reclaim the Host role”
- Use Computer Audio
  - Using Computer Audio is free to DA
    - Calling on a phone costs Democrats Abroad a per minute charge
- Use Sandbox Sessions to test shared content, as well as ensure that A/V connections are operational prior to your meeting

# Level 1 Host Training Refresher

- DA uses shared accounts for all DA meetings
  - Be considerate of users globally across the organization
  - We now have multiple licenses to allow for meeting overlaps
- DA WebEx meetings “auto start” and are available for login **15 minutes prior** to the scheduled start time
- To avoid scheduling conflicts and overlaps we require:
  - **At least ½ hour** gap before and after each meeting *per account*
  - It’s up to you if you are the Host to schedule accordingly
- Please (PLEASE!) be mindful that there may be a meeting following yours. You, as the Host, are responsible for:
  - **Ending your Meeting, and ending it on time!**

# Level 1 Host Training Refresher

- Use same “d\*\*\*” Password for most all meetings
  - It is better for most DA participants to already know the PW
- Use Full Name and DA Country/Position as login name:
  - We need to know who has joined our meetings – not just Bob or Sally
  - Participant display name is entered or changed before joining meetings
  - Ask participants to re-join the meeting with full name and CC/position
- Use a distinct and logical name for your meeting title:
  - Use a title that identifies your group – not just “ExCom Meeting”
  - Our WebEx meetings are shared by all DA leaders and listed on a collaborative calendar
- Share your video when speaking
  - Participants want to get to know (or get to know!) who is presenting
  - This builds familiarity and collegiality

# Level 1 Host Training Refresher

## Meeting Capacity (2021)

- Our DA WebEx license has **3 Host accounts** with up to **1000 participants each** in a single meeting
- No per-meeting Costs
  - Democrats Abroad pays a fixed monthly fee for WebEx
  - Our organization is not charged per meeting
- Join on WebEx via Computer, Tablet or on Mobile devices
  - Only use dial-in phone number in the event of an emergency
  - **Do NOT** Host a meeting on Mobile or Tablet device or with a Web Browser login
- Note: The WebEx user interface continues to change and evolve – some features may be different on your next meeting.

# Level 1 Host Training Refresher

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WebEx has the ability to Record your meetings as they happen—and to provide you with a recorded playback link.

- **IMPORTANT NOTICE:** Please note that this WebEx service allows audio and other information transmitted during the session to be recorded, which may be discoverable in a legal matter.
- Recording is started by the Host
  - It is not “Automatic”
- **Required:** Inform **all participants** that the meeting is being recorded prior to recording the session





POST-TRAINING SLIDE DECK:  
Audio & Video  
Troubleshooting Resources

# Audio Echoes

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## Issue:

- Echoing is heard in the conference

## Cause:

- Echoing is generally caused by a participant in the teleconference on an open mic creating an audio feedback loop
- A mic of one of the members of the meeting (*Participant, Host, Presenter*) is picking up the teleconference and rebroadcasting it

## Steps to resolve:

- Mute **ALL** lines in the teleconference (Participants, Speaker, Host)
- Unmute one active speaker
- If the issue does not reoccur when the active speakers are unmuted, begin unmuting attendees to determine which attendee is the cause of the audio feedback loop
- If you are able to isolate an individual attendee as the cause, ask the attendee to manually mute their mic, do not use an open room mic (use a headset instead), or leave the attendee muted in the teleconference

NOTE: For conferences of more than two people, using headphones can help prevent echo and/or feedback

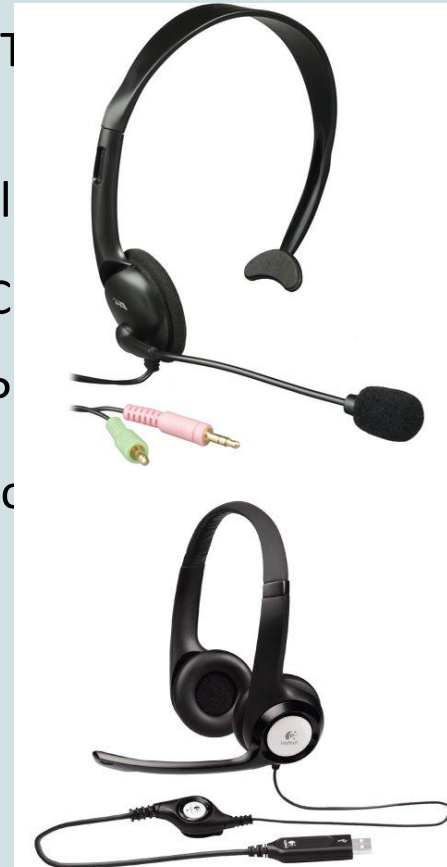
# A Short Note About Headsets

Why do I need a headset if my laptop has its own mic & speakers?

- One of the challenges, when conducting meetings where people have “open” mics and speakers, is ambient noise. This can be anything from typing on the keyboard to road sounds. One of the main culprits is fan noise (even from your laptop)
- In most cases a reasonable headset/mic combo will mitigate the problem

Note: the headset connection **needs to match** the port on your PC. There are three of the most common types:

- **Top:** this is a standard 4-ring connector, iPhone headset. This will work with a single audio port.
- **Middle:** This is an older, dual jack, PC headset. It requires the PC Speaker and Mic ports (note pink/green jacks)
- **Bottom:** This is a USB headset. You can attach this to most any PC in the last 10 years
- **Bluetooth (not shown)** If your PC supports BT this is a great option, but it is tied *too closely* to the computer



# DA WebEx In-Room A/V/PC Setup

## Example Setup: Audio/Visual /Web Cam & PC setup

→ Schedule a chat with the DA WebEx team to plan for a successful meeting

