GUIDE FOR VCPH PROFESSORS AND TUTORS (HOSTS & PRESENTERS)

1. Roles in WebEx rooms:

Host: Has control of the room. Has the responsibility to open and close the session. There is only one host per session. The host has the most permissions.

Presenter: Is the person that is presenting in that moment, for example, power point slides that all participants will see in the whiteboard. Also, the presenter has additional options, such as looking at the order in which the participants have raised their hands, and assigning the chat permissions. Any participant (Host, Panelist or attendee) can be changed to Presenter at any given moment.

Panelists: They are the host assistants. Panelists can upload other slides while the Presenter is showing his presentation. Also, they can make annotations on the whiteboard.

Attendees: These are the participants or invited guests to the session. Attendees have the least amount of permissions, except if they are assigned as Presenter.

NOTE: The host, presenter and panelist have control of their own microphones. The host and presenter can open / mute the attendees' microphones. It is recommended that all microphones be muted except for the person who is talking, to avoid feedback and background noise.

2. Actions that must be completed by professors and tutors of WebEx sessions (Hosts, presenters, panelists)

Before the session:

- Request the room in advance (coordinators)
- Decide who will assume the role of Host
- Receive the host username and password. Receive the host link
- Receive and share the participants' link

During the session:

- **Open the room in time for the meeting:** The host link to open the room is NOT the same as the link of participants. The host must open the room before other participants can enter.

- **Coordination of the room:** We recommend that for sessions, one person be assigned as host, and another one as assistant / support.
- **Activate chat to all participants** (see steps below).
- **Open the microphones of participants when they need to speak.** When all the participants enter the session, they will have their microphones muted.
- **Be careful with their own microphones.** When the host enters the session, the microphone is open. Also, the microphones are activated when changing someone's role to Presenter, host or panelist.
- **Start the recording:** Must be started by the host or presenter.

After the session:

- **Close the session.** Must be done by the host. When the host closes his WebEx window, the session will end for all participants.
- **Request the recording link to the VCPH:** Recordings are not stored permanently. They are available for some time. Only the most important recordings (presentation by an expert in some topic, presentations of general interest, etc.) can be stored in another format (for example Youtube) and this represents specific work.

3. Options

Verify the following list, and in the following sections look for the options that you wish to review (including screenshots and brief explanations):

1. Opening the WebEx room and starting the session (can only be done by the host)
2. Helping participants who can't listen
3. Activating the chat to all participants (must be done by the Presenter)
4. Opening participants' microphones
5. Unmuting all microphones
6. Starting the recording (host)
7. Changing the role of presenter to another person
8. Recovering the presenter role (only the Host)
9. Sharing contents (Power Point slides, PDF, etc.)
10. Changing between tabs of shared contents
11. Moving between slides
12. Closing one of the tabs of shared contents
13. Showing the whiteboard in Full Screen
14. Activating the panels (chat, participants, microphone) when showing Full Screen
15. Sharing applications
16. Sharing my screen / desktop
17. Making annotations in the whiteboard
18. Opening a new blank page in the whiteboard
19. Selecting the recipients of chat messages
20. Sending a private chat
21. Changing an Attendee to panelist

22. Changing a participant to Attendee
23. Checking participants who have raised their hands
24. Using Yes / No answers
25. Closing the WebEx window
26. Ending the session for all participants
27. Changing the role of Host to another person

Other options:

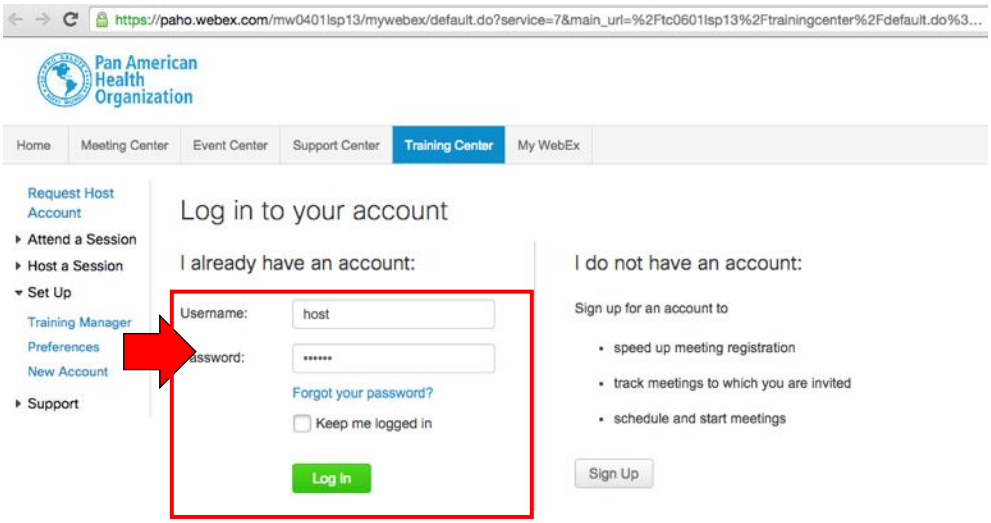
28. Adjusting the volume of the microphone and speakers
29. Testing the speakers and verifying microphone
30. Sending a reminder of the session while inside the room
31. Saving the contents of the whiteboard
32. Saving chat messages
33. Transferring a file to participants
34. Sharing a video
35. Monitoring the attention level of participants
36. Visualizing the list of participants

1. Opening the WebEx room and starting the session (can only be done by the host)

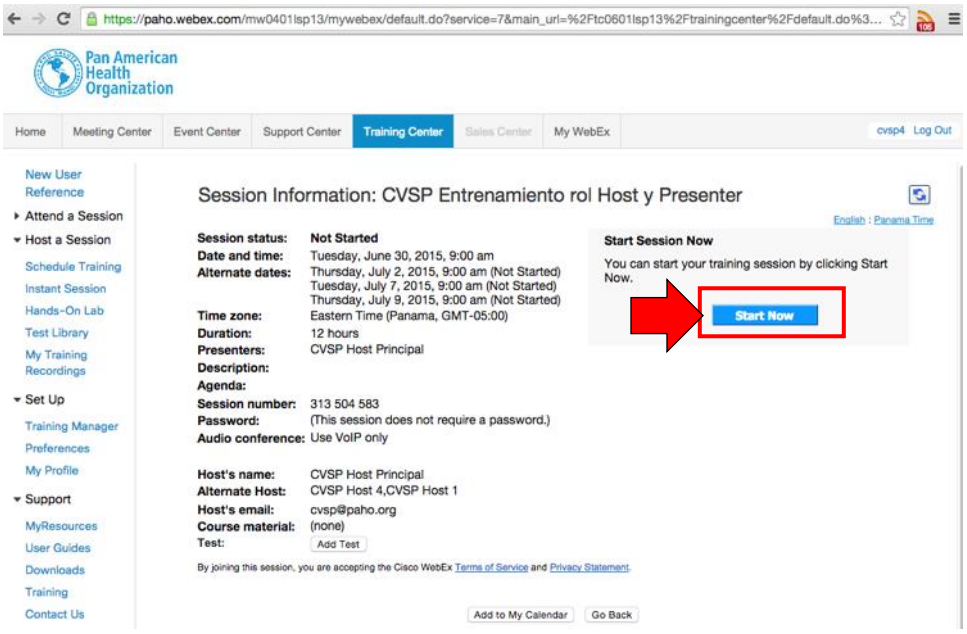
The person that will have the role of host must open the room before the other participants can enter. We recommend that the host enter the room at least 15 minutes before the scheduled time for the meeting.

The host will receive in an e-mail sent by the VCPH Regional team the instructions to open the Room. A username and password will be sent in order to have the Host role during the session, and the link to start the session (which is NOT the same as the participants' link). The username and password should NOT be given to other people.

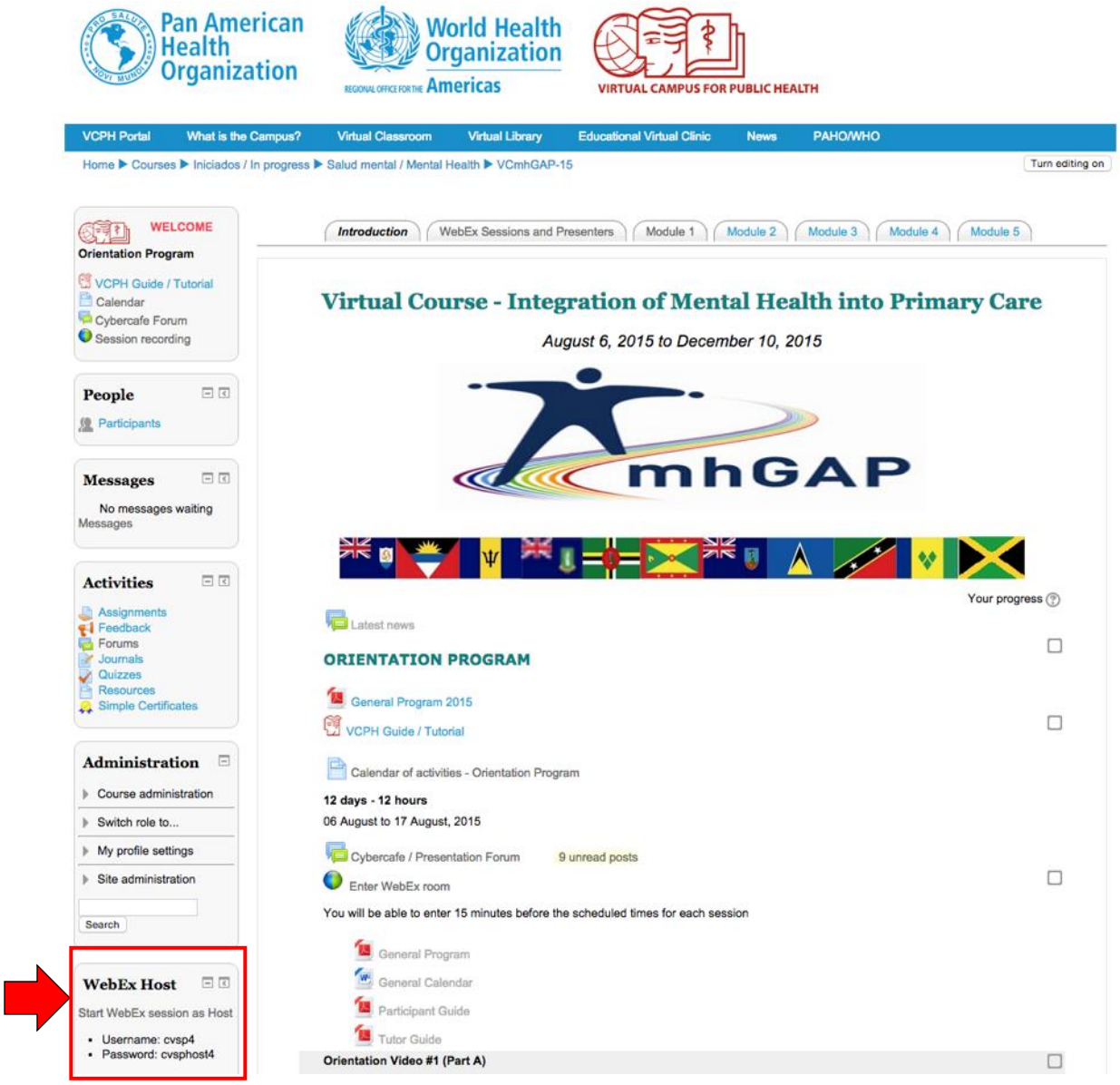
After opening the link, a window will open. Enter the username and password that you have received and press **"Log in"**:



Once you have entered the username and password, you will see a description of the Room (dates, hours, host names): Press the button **"Start Now"** to open the room.



In some cases, the Regional Team will add a block in the course (only visible to Professors / coordinators; or in some cases, visible also to tutors), with the link to open the room, and the username and password.



In all courses you will see the participants link, so that students can enter the session with the least amount of difficulties. In the case of the participant, it will not be necessary to enter a username and password. Only a name (which will be used to identify the participant inside the room) and an e-mail (to have the list of people who attended the session) will be requested.

2. Helping participants who can't listen

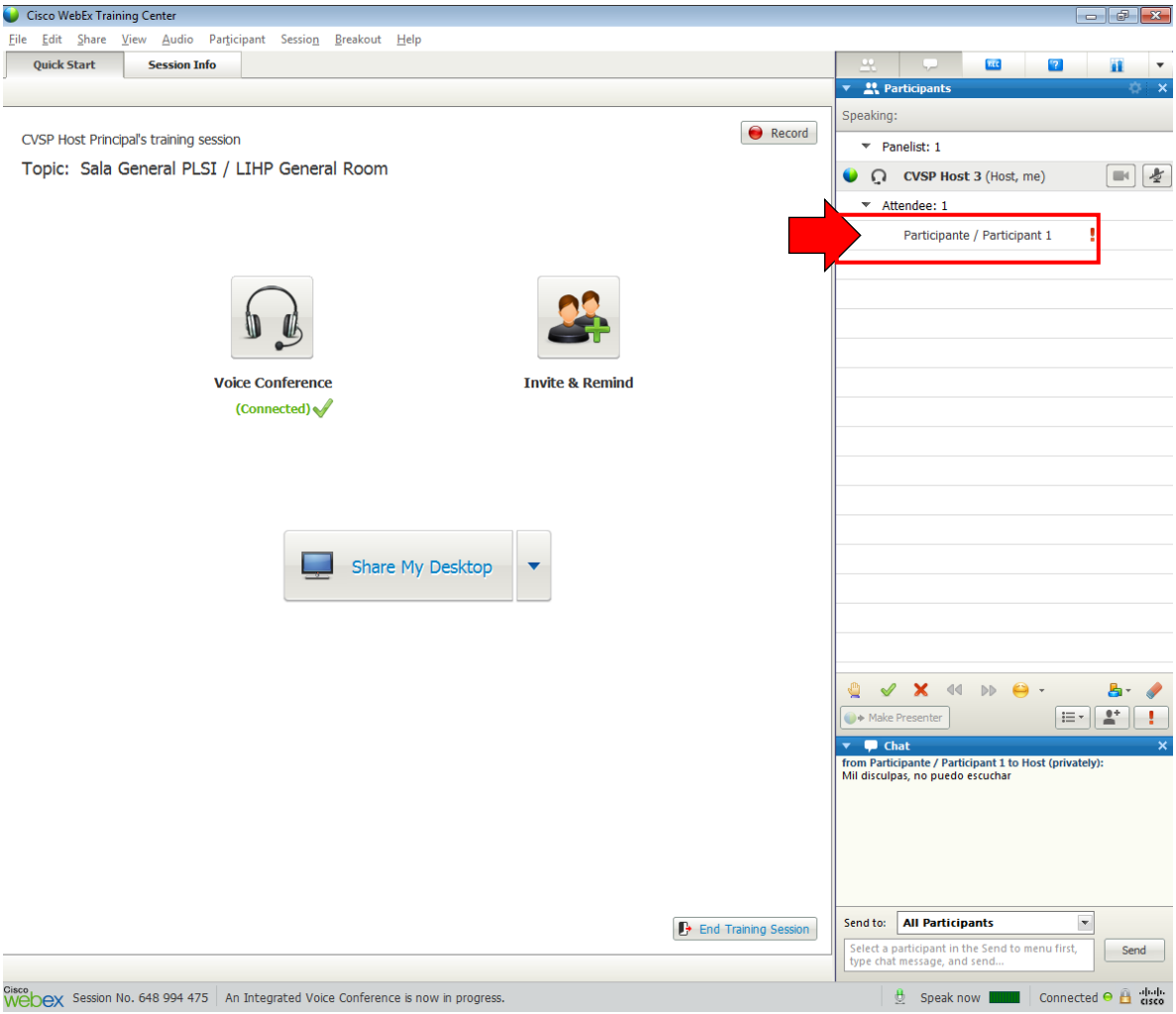
In some cases, the participants who enter the Room are not able to hear or listen.

Remember that when opening the room, a window appears that asks the participant to connect, with the following message:

"Join This Integrated Voice Conference: Your presenter has started an integrated voice conference. Do you want to participate?"

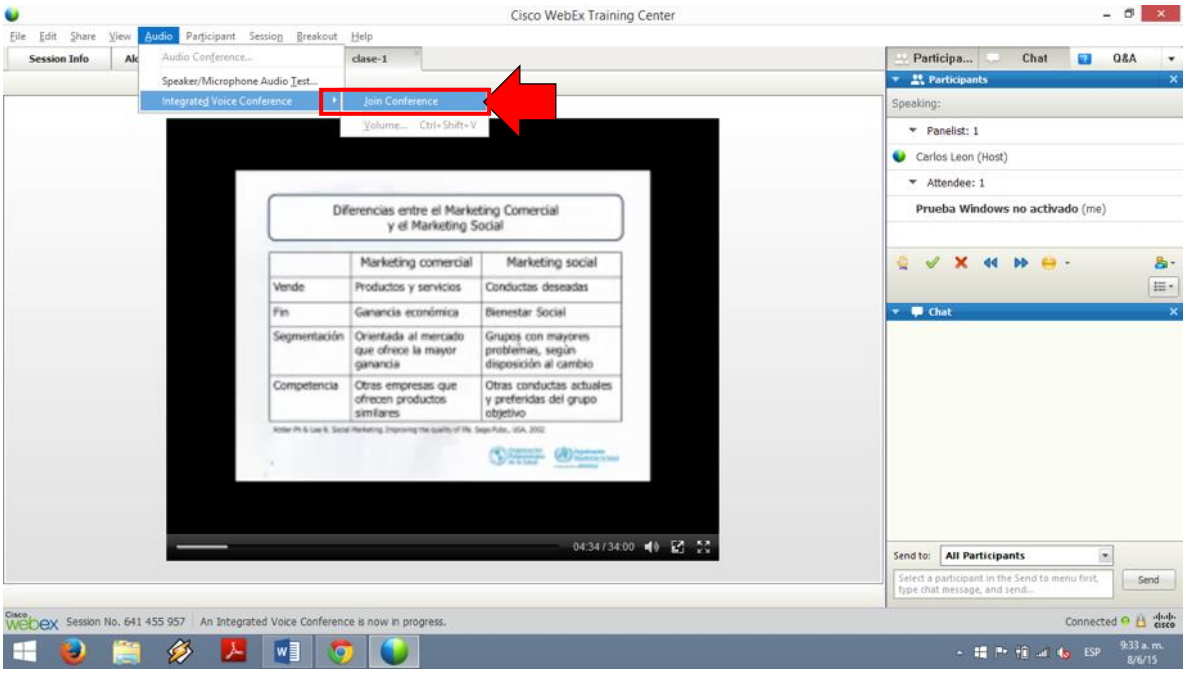
Select "Yes" to enter the Room and automatically activate your audio.

In the following image you can see that the user "Participante / Participant 1" is not listening, since next to his name (at the left), there is no headset icon.



When you identify these cases, please ask the participant who can't listen to try to go the menu **"Audio"**, then **"Integrated Voice Conference"**,

Finally, select **"Join Conference"** to begin listening.



Also, the participant can try closing the window and joining again.

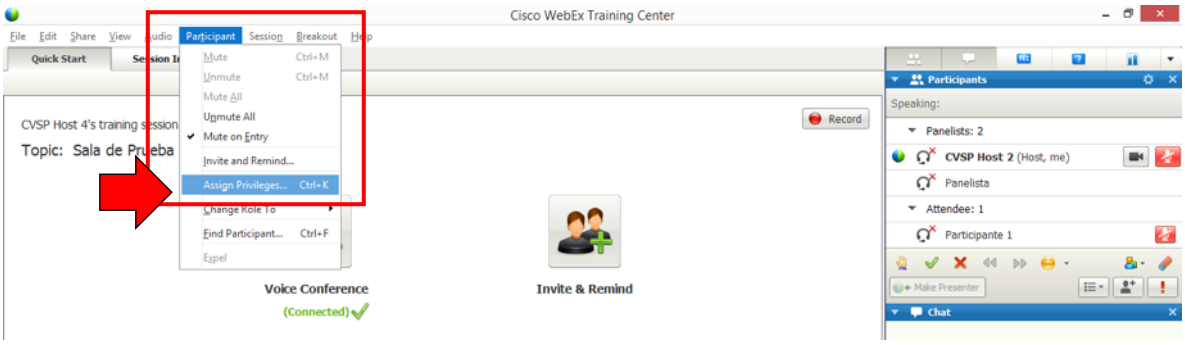
In other cases, the configuration / installation of the speakers and/or microphones in the computer can be the problem. It is recommended to ask for help to someone with more experience inn the use of technologies that is near.

Observations:

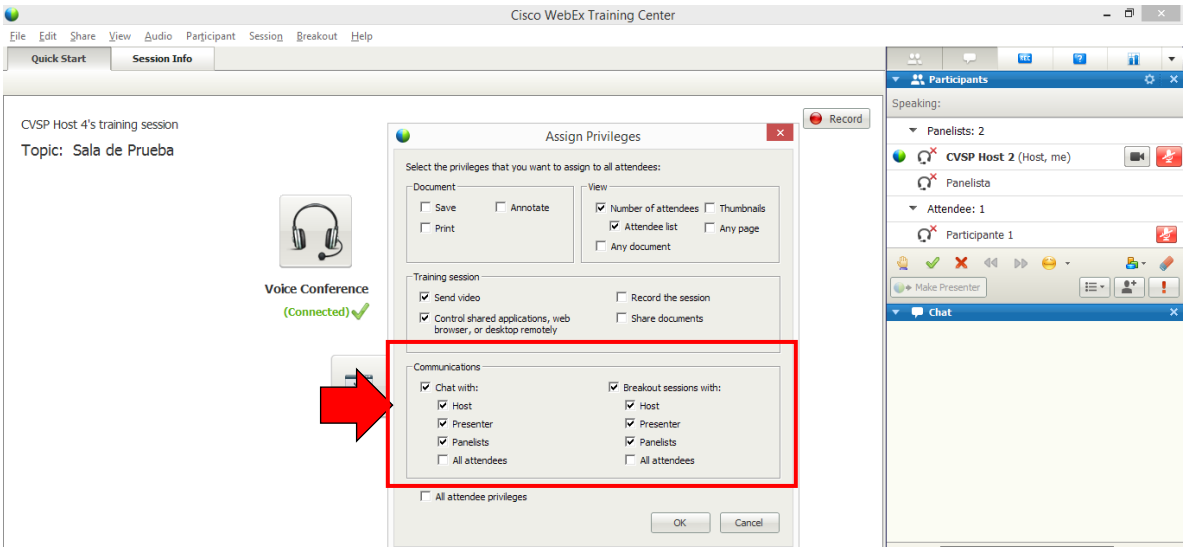
- Conflicts in activating audio have been detected when using the "Internet Explorer" browser (Windows).
- For users who join the session with mobile devices, the screens will be different. Please read the WebEx guide for mobile devices, available in the Campus Help Desk.

3. Activating the chat to all participants (must be done by the Presenter)

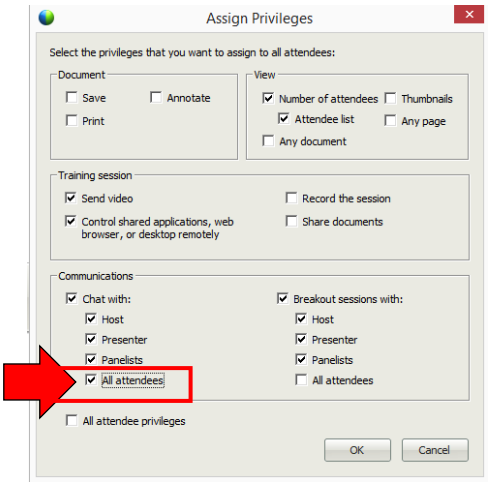
When you open a WebEx session, participants are not allowed to send chats to "All participants". To activate this permission, the Presenter must go the menu, **"Participant"** options, then **"Assign Privileges".**



A window appears to **"Assign Privileges",** look for the tab or section of **"Communications".**



Then, put a checkmark in the option **"Chat with:" "All attendees",** and press the **"OK"** button**.**



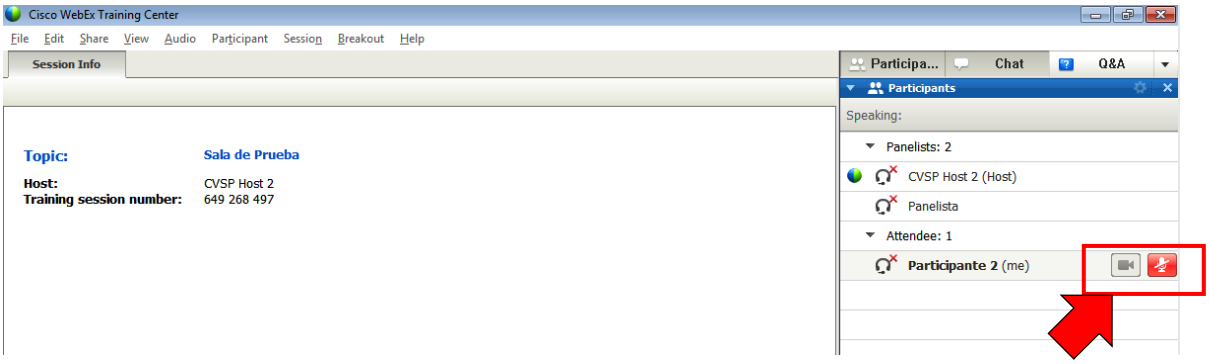
If you don't follow these steps, participants will only be able to send messages to the Host and panelists, and not to the rest of participants.

4. Opening participants' microphones

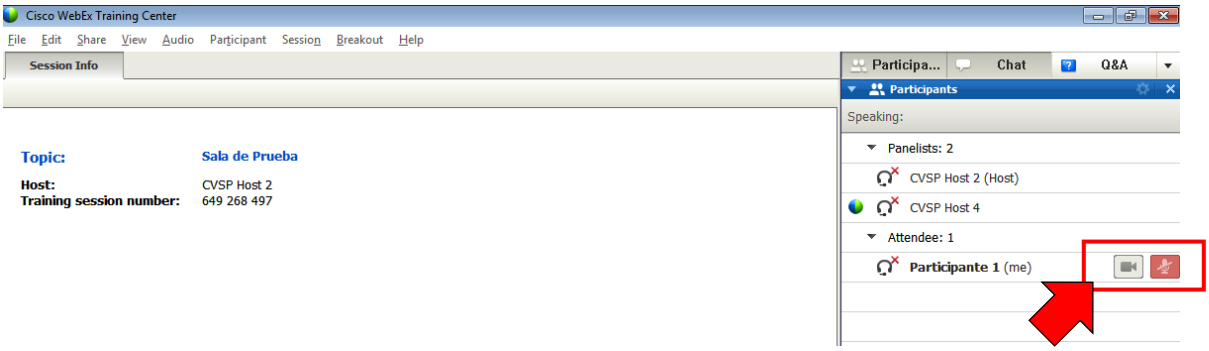
All WebEx rooms have the **"Mute on Entry"** option activated**.** This means that when participants (attendees) enter the room, they will have their microphones disabled and will not be able to speak. Remember that the host, panelists and presenter have control of their own microphones.

Once an attendee's microphone has been enabled, the participant can mute it by clicking on the microphone icon next to his/her name, at the right.

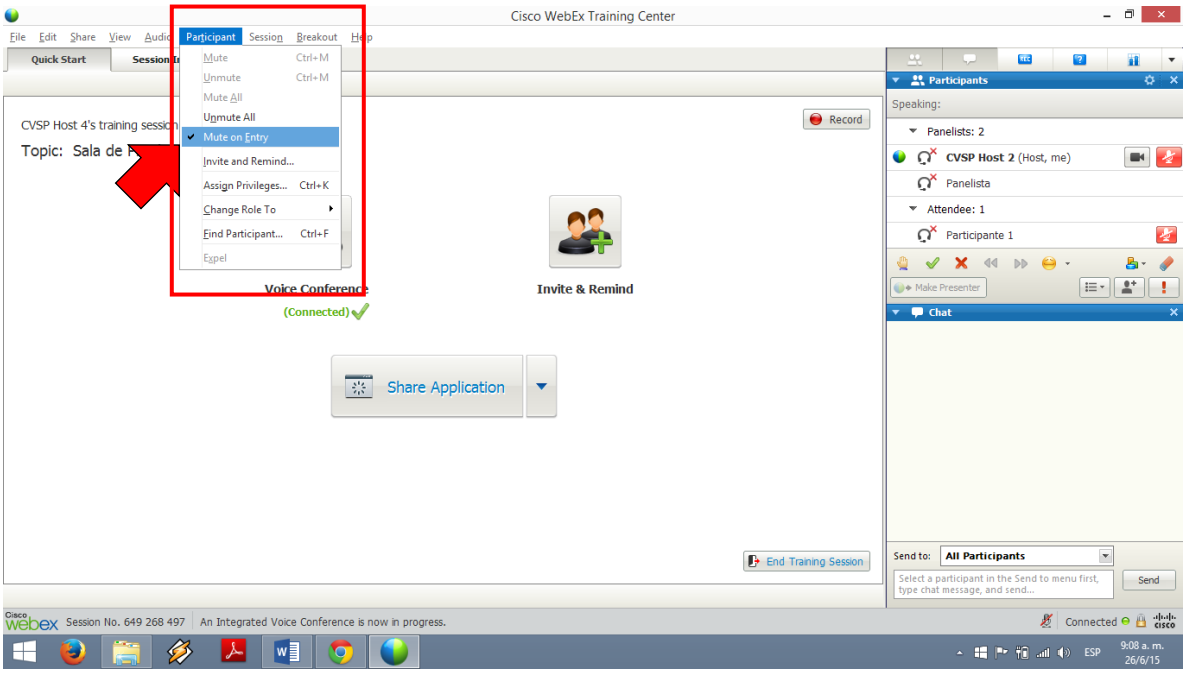
If the icon is in red, the microphone is muted.



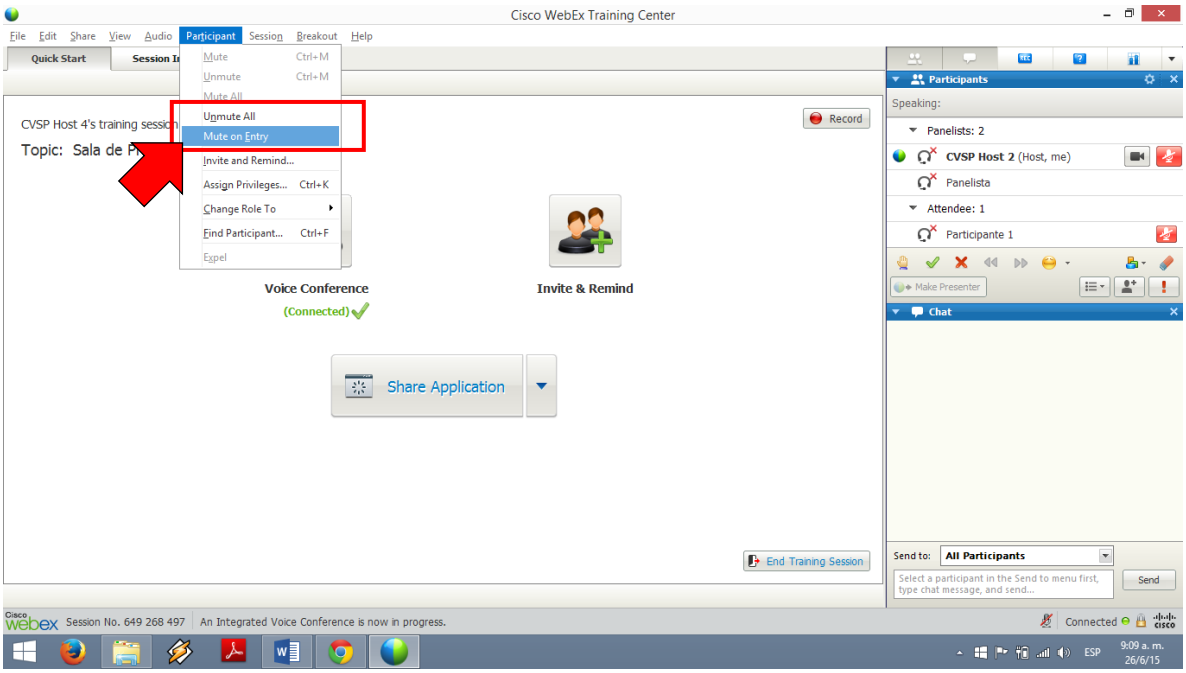
When activated, the icon will change to gray. If the host has disabled the microphone (by clicking on the icon next to the name of that person), then the icon will appear in a shaded red color, and the participant will not have the option to activate it and talk:



The option of muting all participants' microphones when they enter the room can be enabled / disabled in the menu, **"Participant"** options**,** then **"Mute on entry".**

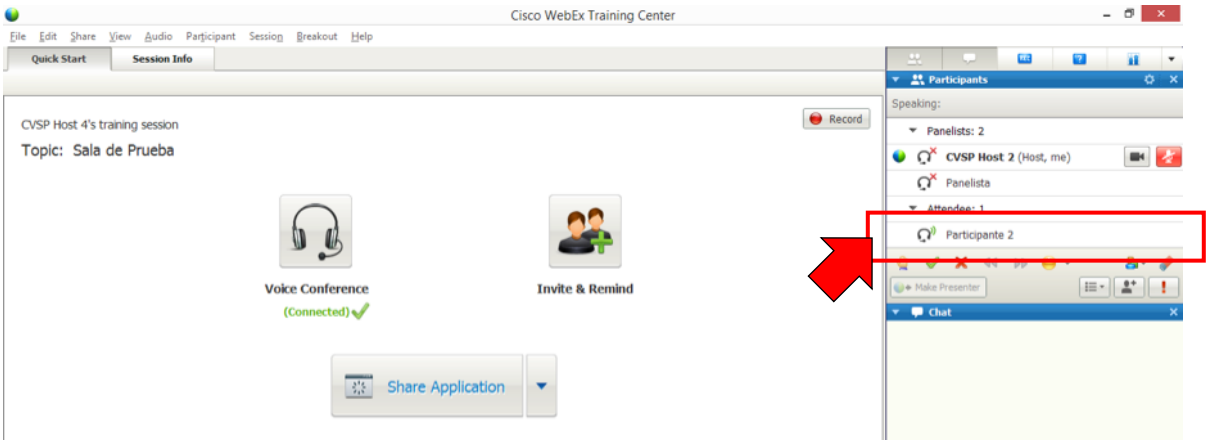


After clicking the option, the checkmark will disappear.



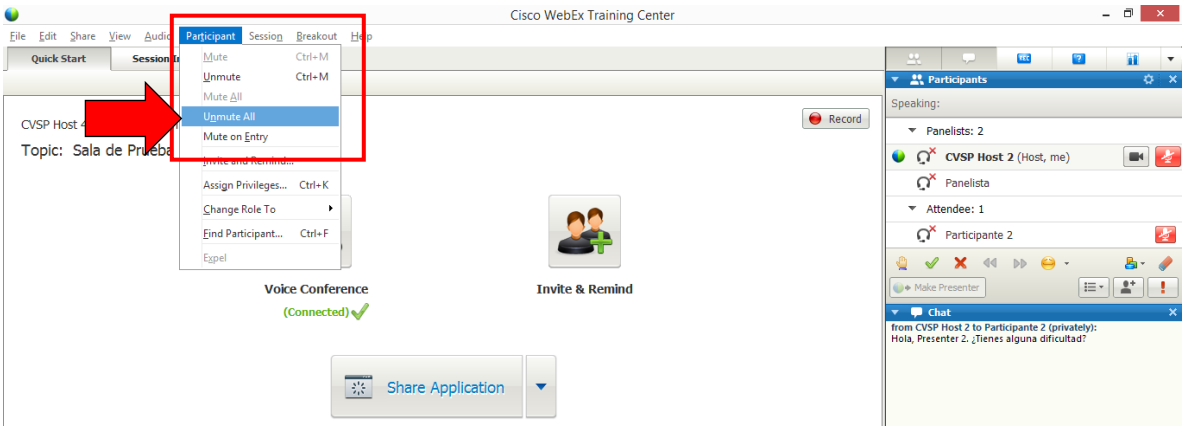
This option is recommended only for sessions with few participants or specific cases in which we need the participants to be able to speak when they enter.

We can see in the following example, in the case that the **"Mute on Entry"** option has been disabled**,** that **"Participante 2"** has just joined the session, and his / her microphone is already activated.



5. Unmuting all microphones

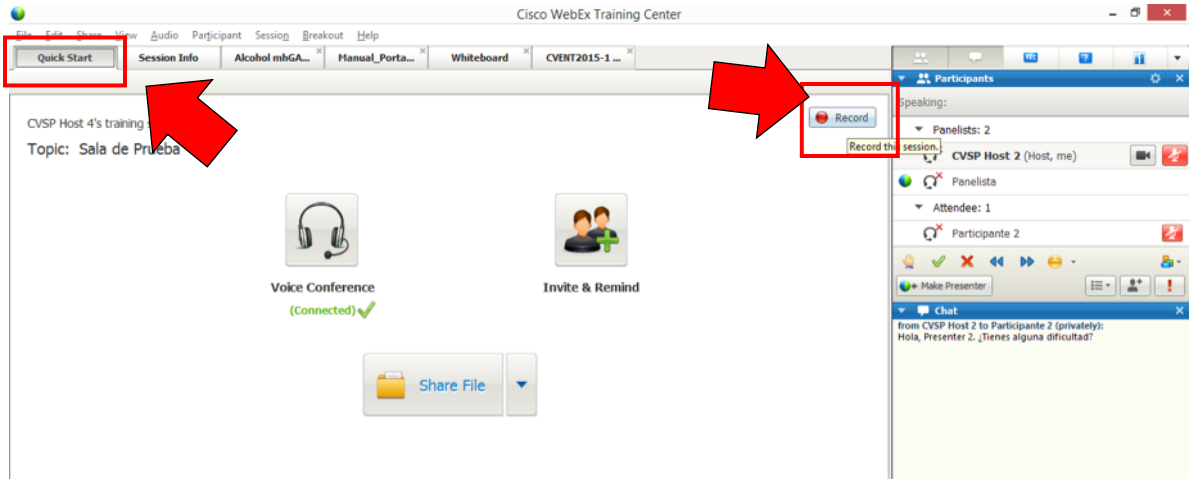
It is possible that at some point you need to press **"Unmute All",** to activate all microphones at the same time, and that each participant be able to mute / unmute on his own. This can be done through the menu, **"Participant"** option**,** then **"Unmute All".** This option is <u>not</u> recommended in most cases.



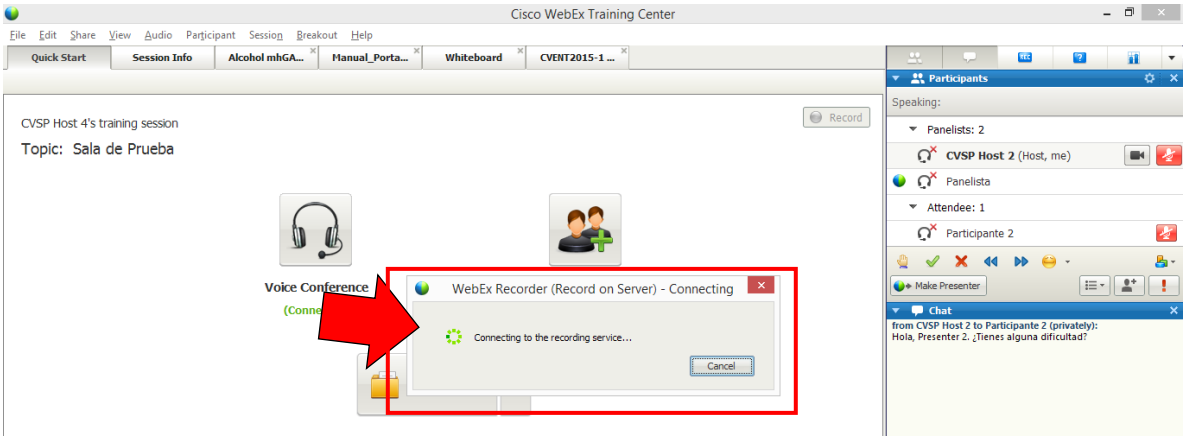
6. Starting the recording (host)

To start the recording, click on the menu, **"Session"** options**,** then **"Start Recording".**

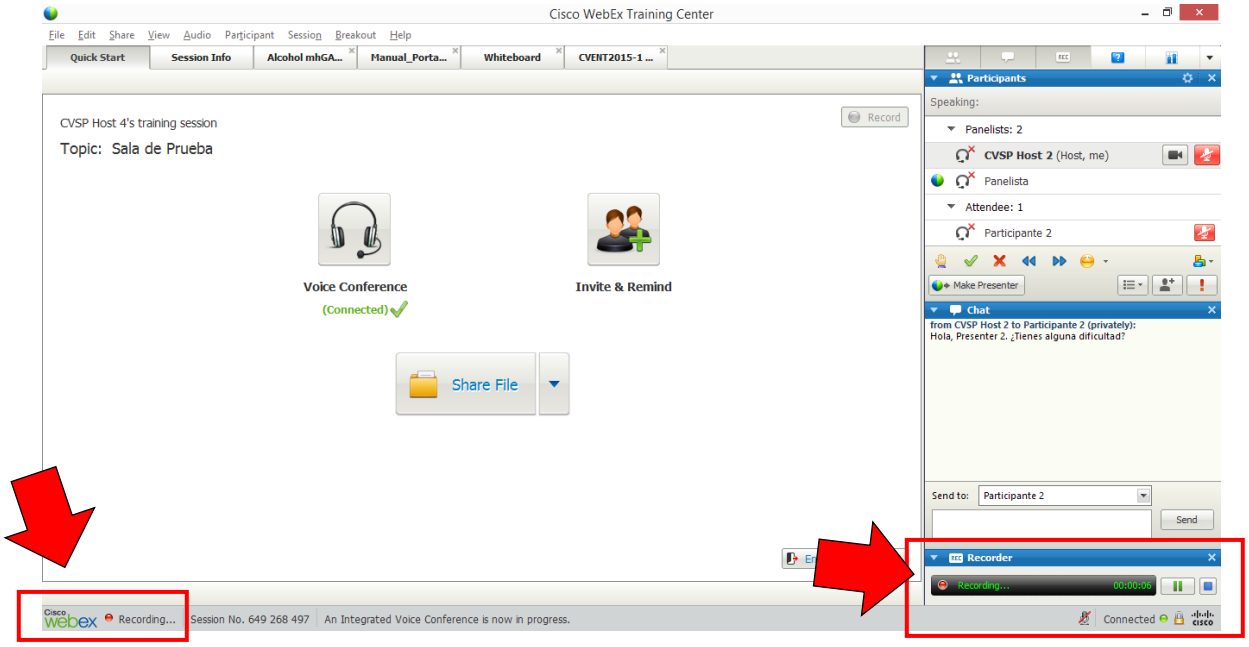
Also, you can go to the Quick Start tab, then the **"Record"** button**.**



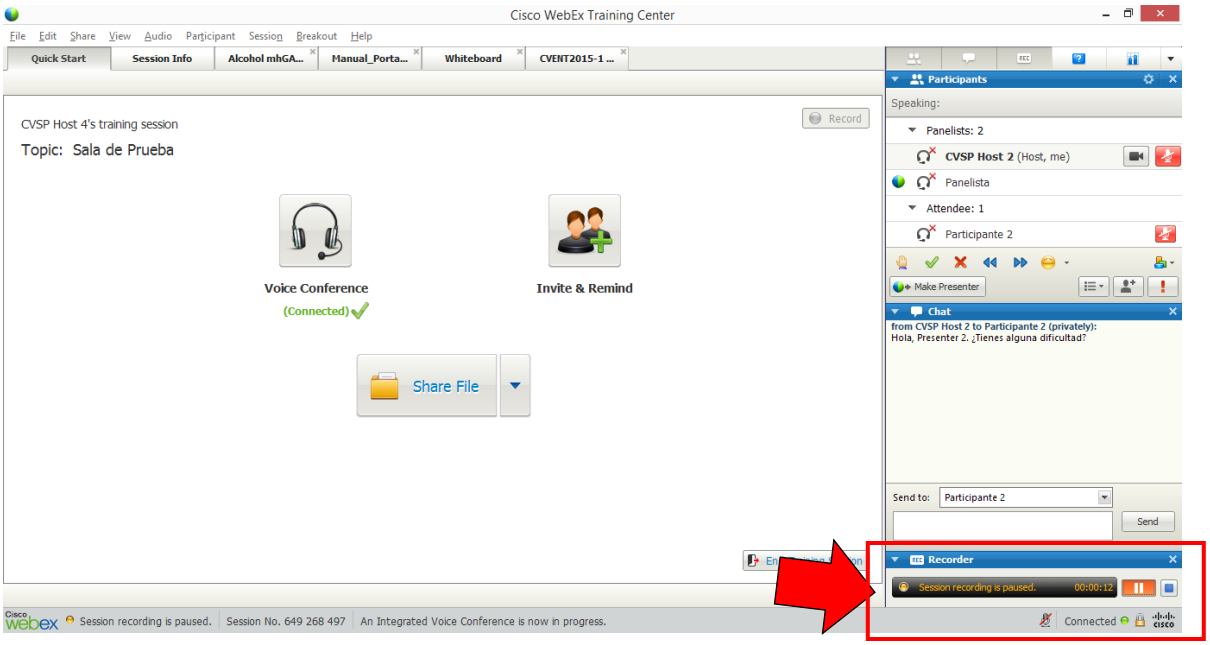
The recording will start.



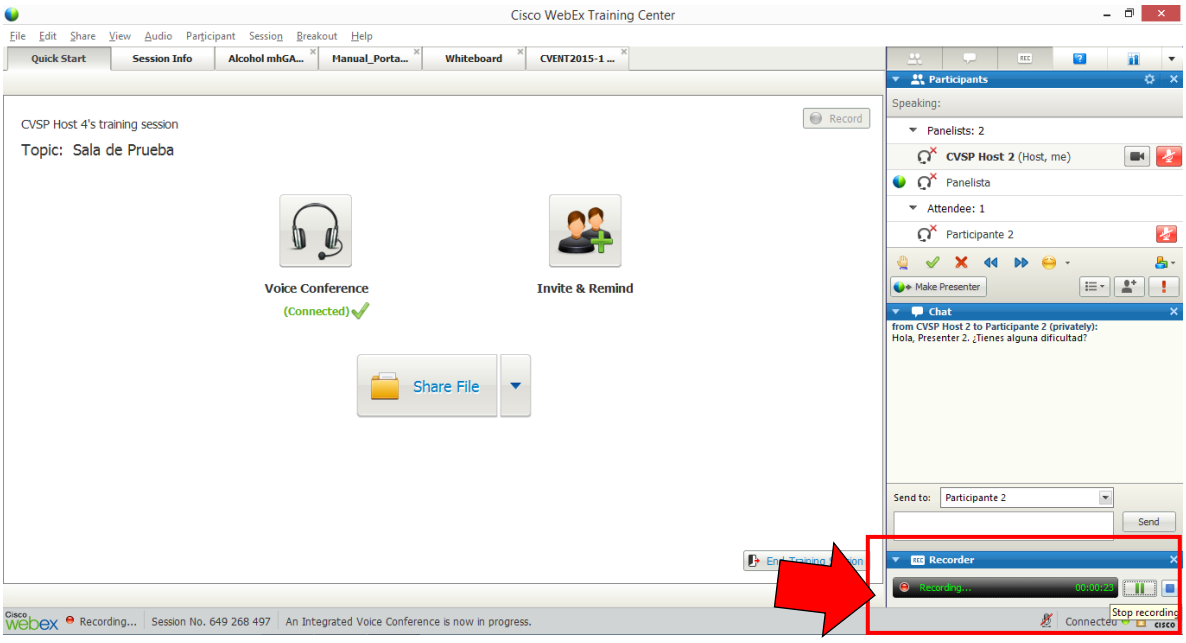
A message appears at the bottom indicating that the recording is in progress.



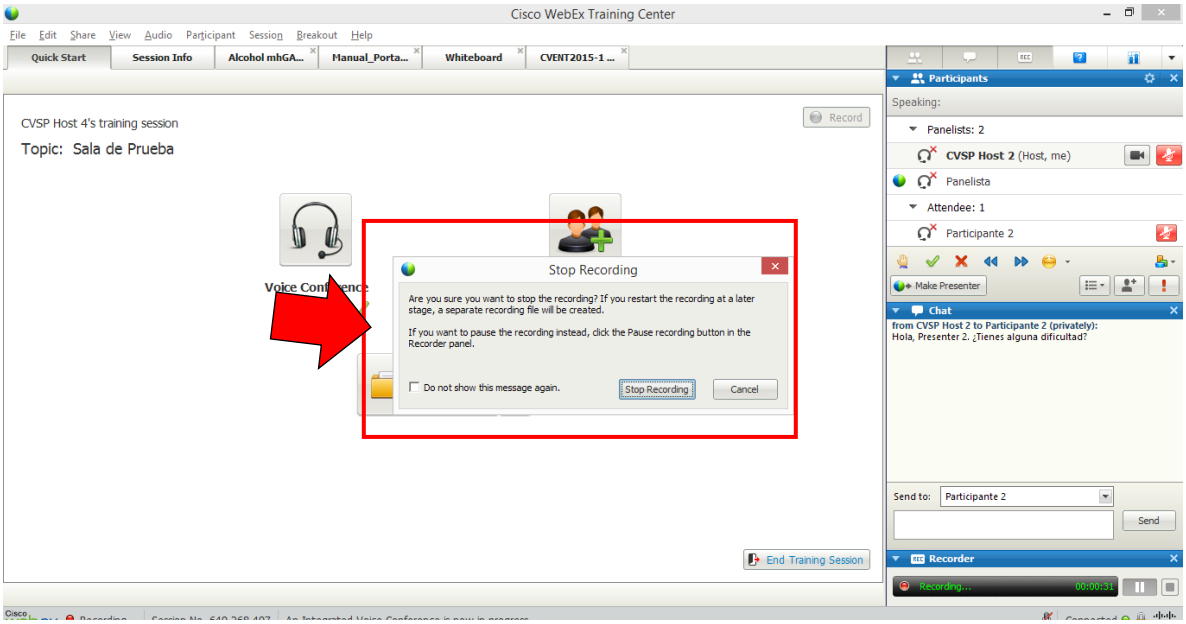
The recording can be paused.



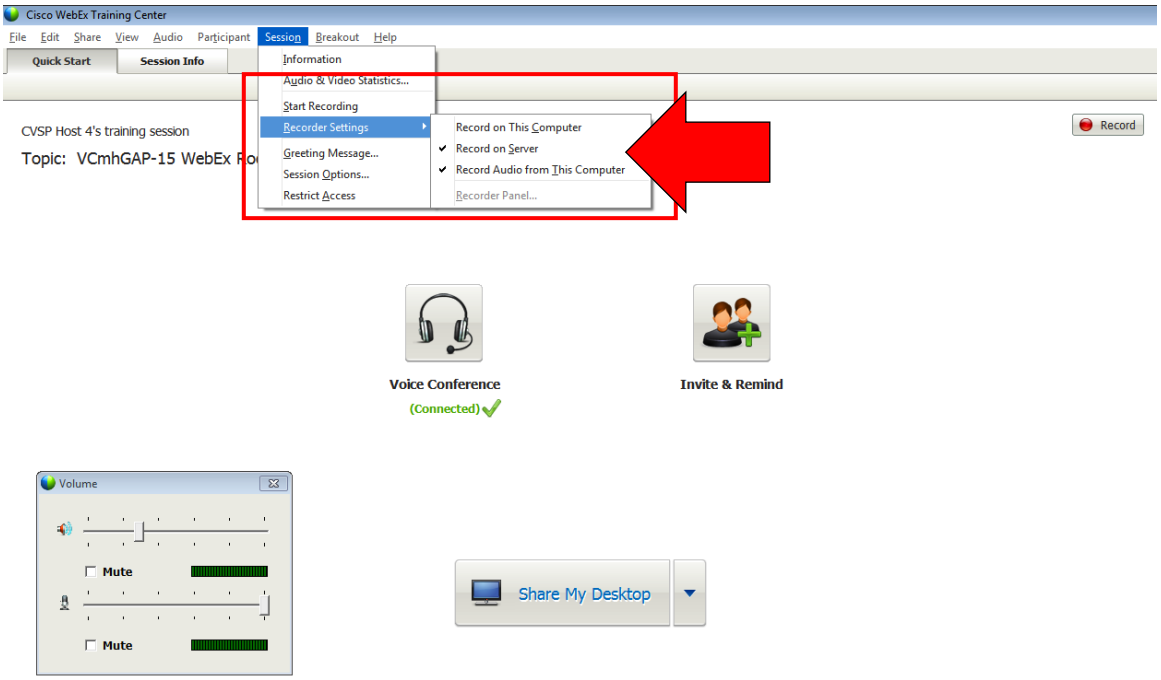
Also, the recording can be Stopped. Please note that if you stop the recording and start it again, then two different recordings will be saved.



For this reason, a warning appears to confirm that the recording will be stopped.



Before starting the recording, check in the **"Session"** menu, option of **"Recorder Settings"**, that the checkmark on **"Record on Server"** is activated**.**



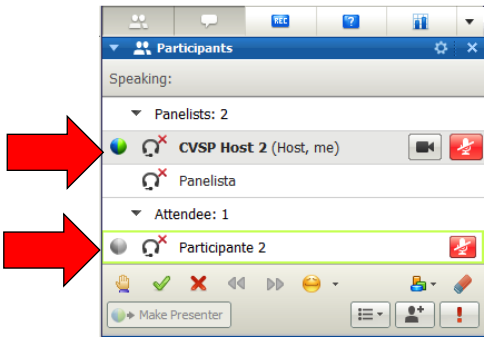
This will save the recording in the WebEx server. Afterwards, you must request the link to the recording to the VCPH team.

In case that the checkmark is in the option **"Record on This Computer",** then the recording would be saved on your own computer (in a file) and this is NOT recommended nor desired.

The host must start the recording. The presenter cannot use the Record on server option.

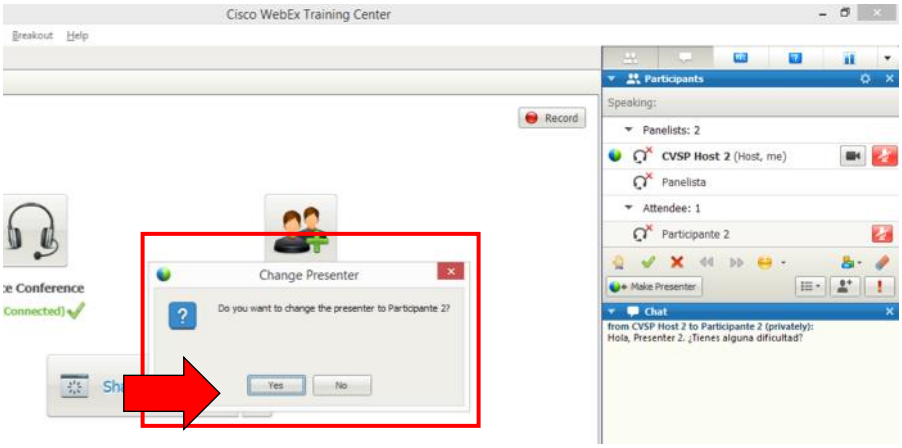
7. Changing the role of presenter to another person

To change a person to the **"Presenter"** role**,** drag the blue / green ball icon next to their name.

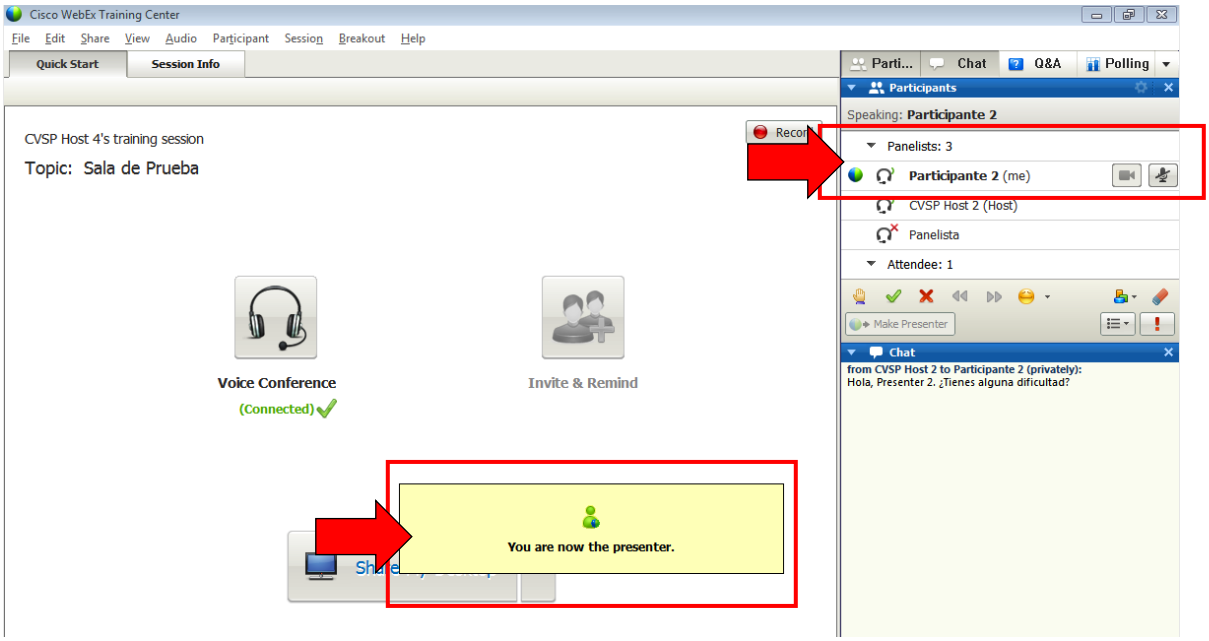


Or click on the name of that participant, then **"Change Role to",** and select **"Presenter".**

A confirmation message will appear: **"Do you want to change the presenter to Participante 2?".** Select **"Yes"** to proceed.

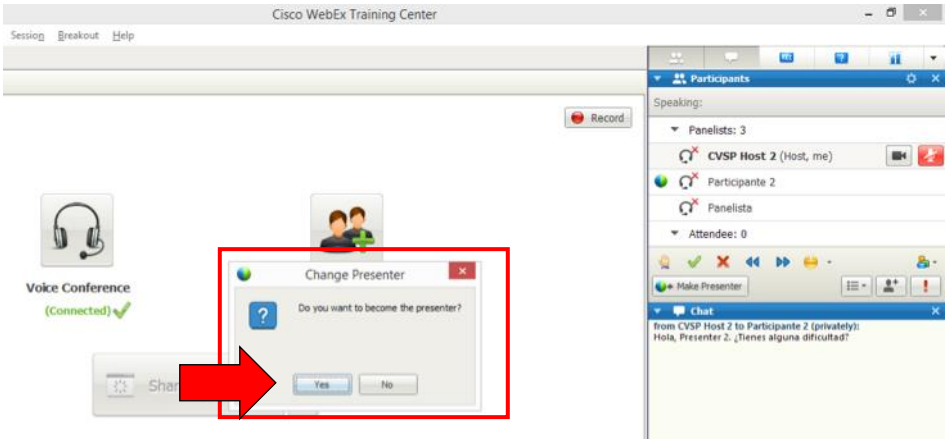


The participant who receives the presenter role will see the following message. Automatically, their microphone is activated and this participant becomes a "Panelist":

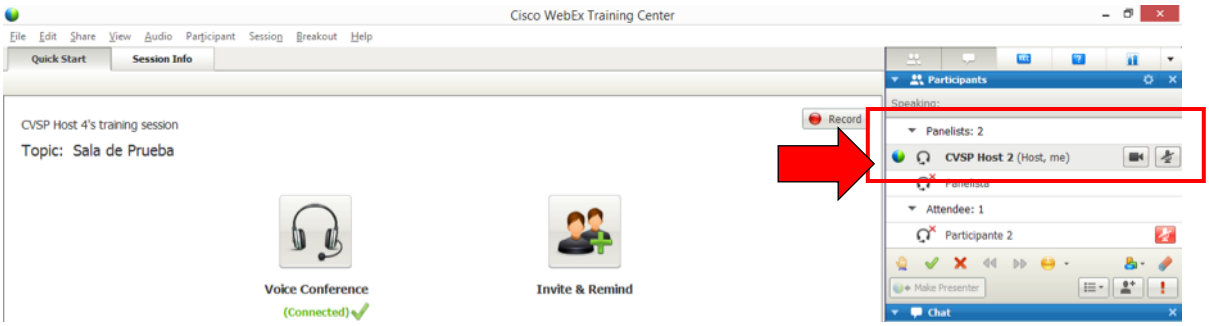


8. Recover the presenter role (only the Host)

If another person is the presenter, as a Host you can recover the role of presenter. Drag the same icon to your name. The confirmation message **"Do you want to become the presenter"**, appears and select **"Yes".**

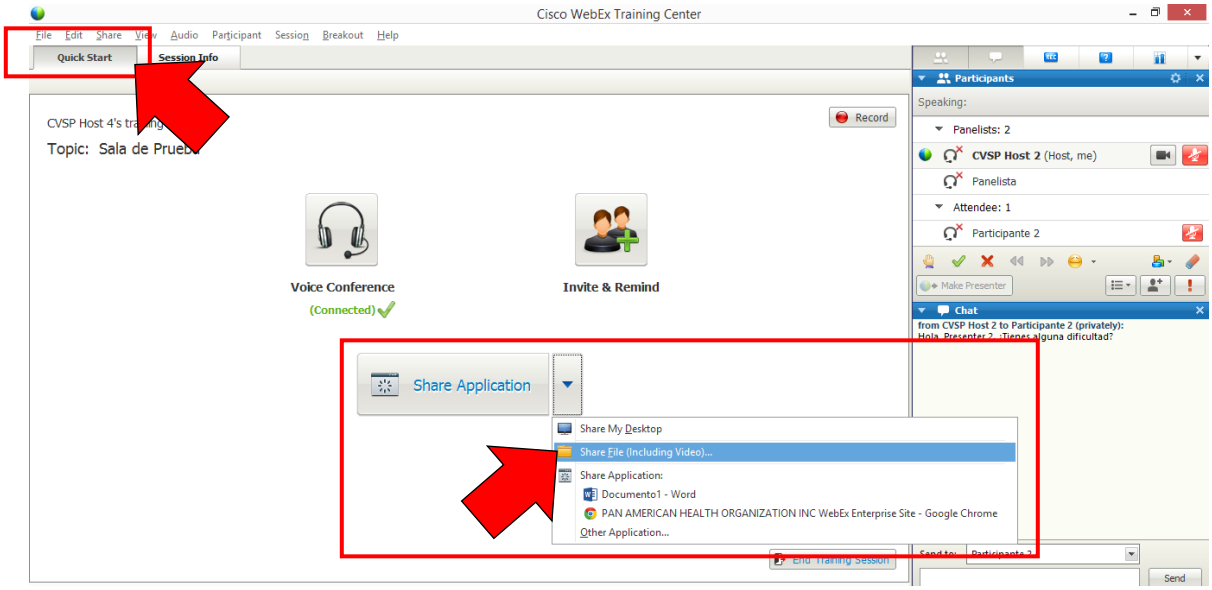


The ball icon will appear next to your name. Be aware that your microphone will automatically be activated.

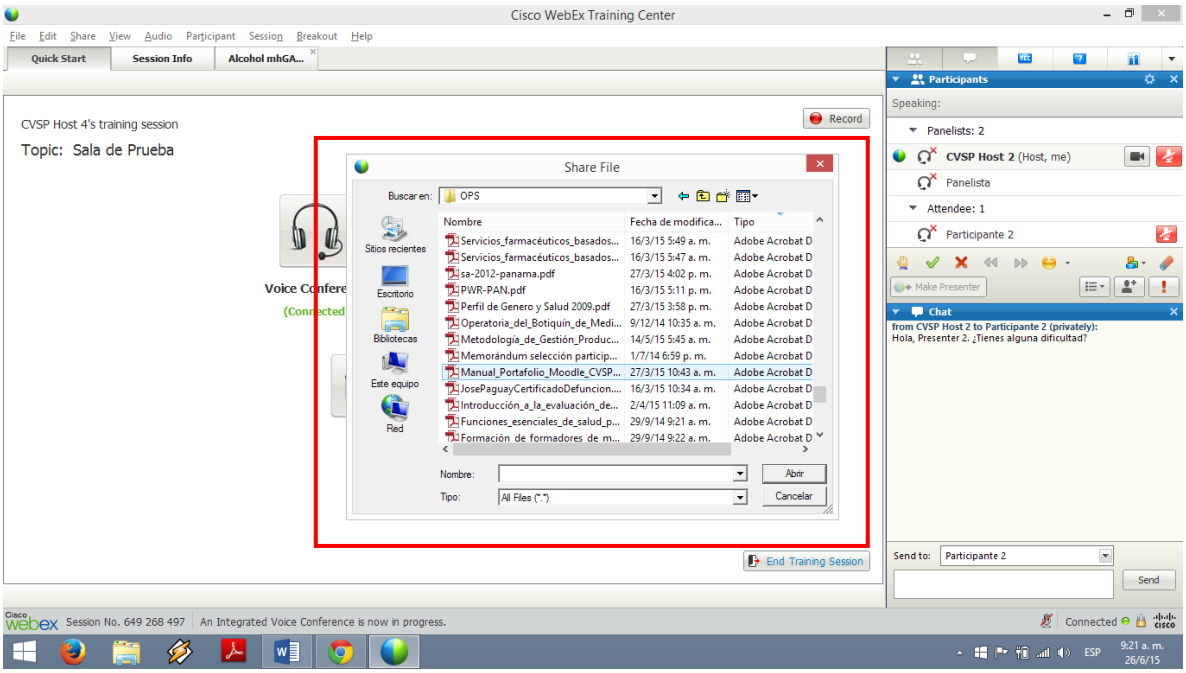


9. Sharing contents (Power Point slides, PDF, etc.)

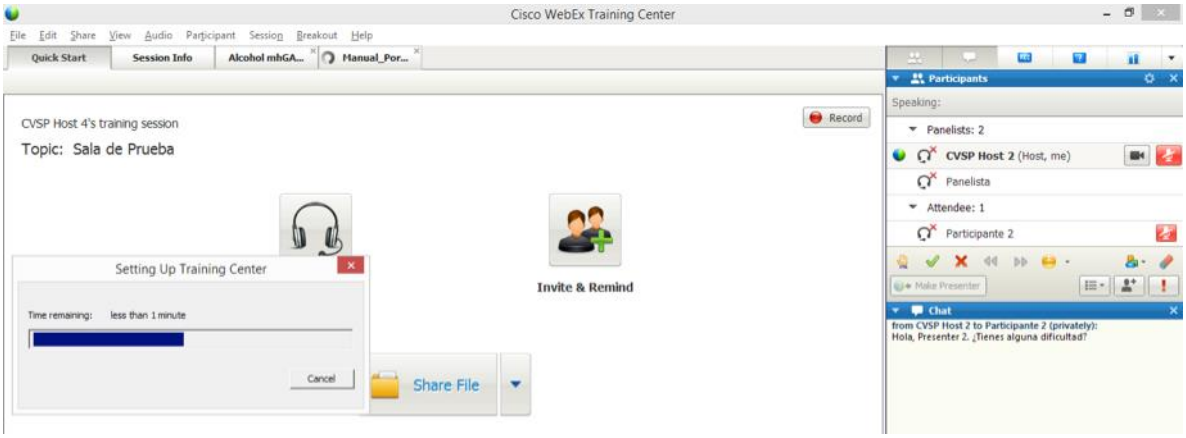
To upload contents, click on the **"Quick Start"** tab. Then, click on the arrow next to **"Share Application",** and select **"Share File".** For example, you can share PDF or Power Point slides. You can also use the **"Share"** menu**.**



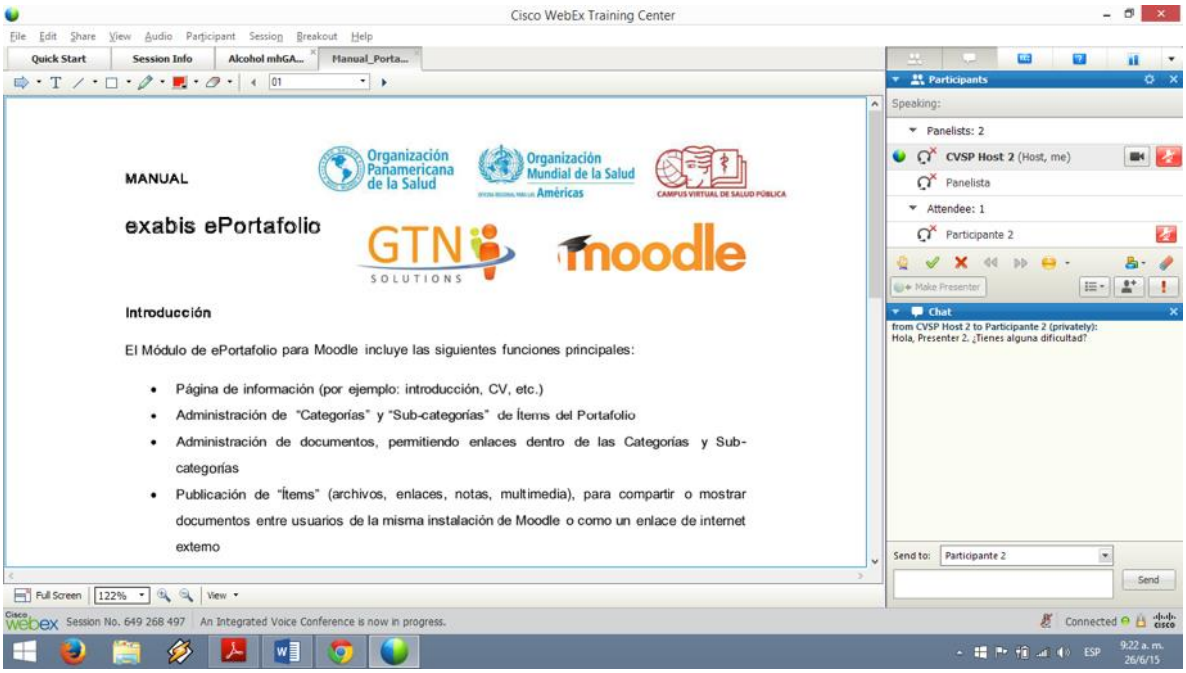
After clicking on **"Share File (Including Video…)**", look for the document in your folders.



A progress bar will appear indicating that the document is uploading.



In this example, the PDF document titled “Manual_Portafolio” has been uploaded. Each page of the document will be uploaded and the different pages can be shown.

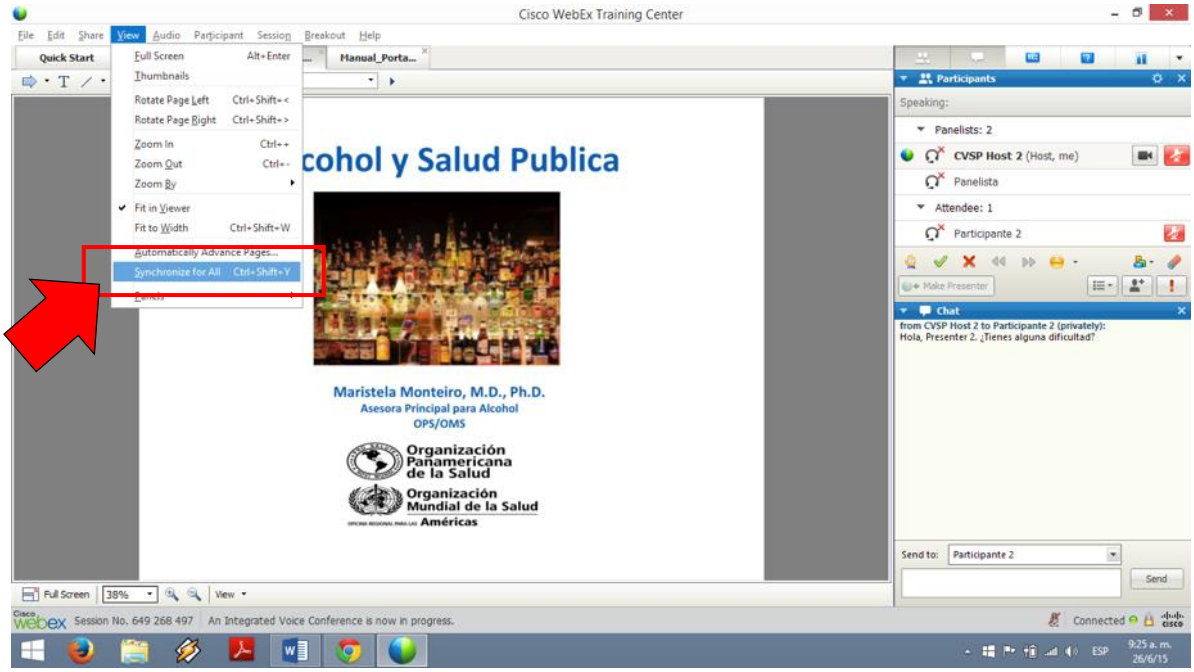


10. Changing between tabs of shared contents

If several contents have been shared, then you can alternate between tabs, and the whiteboard for all participants will change to the tab that the Presenter is showing. Just click on the tab that you wish to show.

The other panelists can open other tabs, but all participants will see the one that the Presenter has opened.

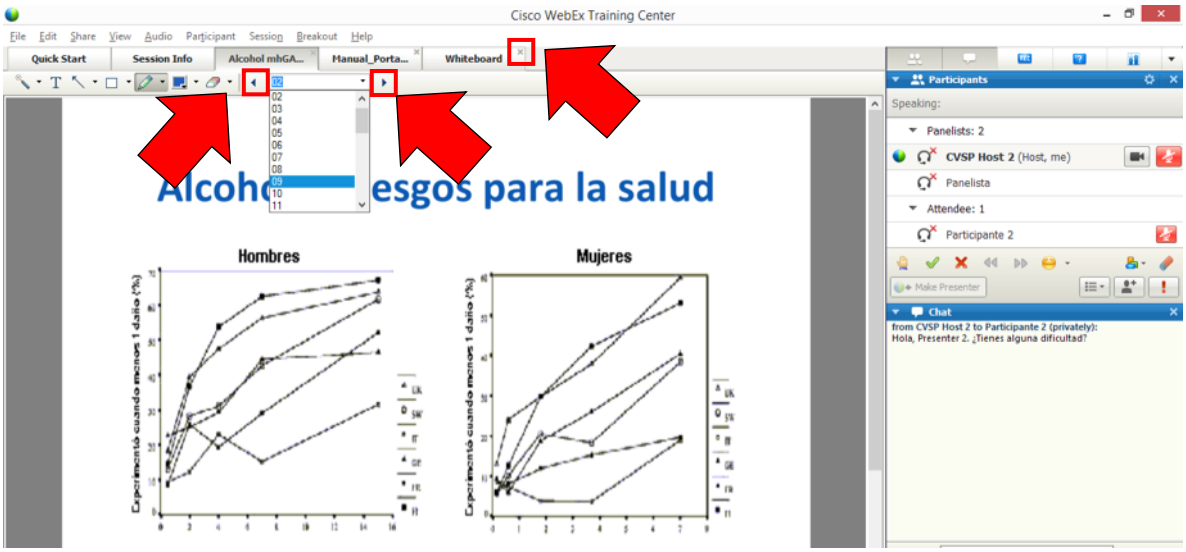
If the presenter wants all the panelists to return to the same window, then the option in the menu "**View", "Synchronize for All"** option can be used**.**



Sometimes, several tabs can be uploaded, and you will need to click on the arrow to see the other contents.

11. Moving between slides

With the left / right arrows you can move between the slides back / forward, or select a specific page.

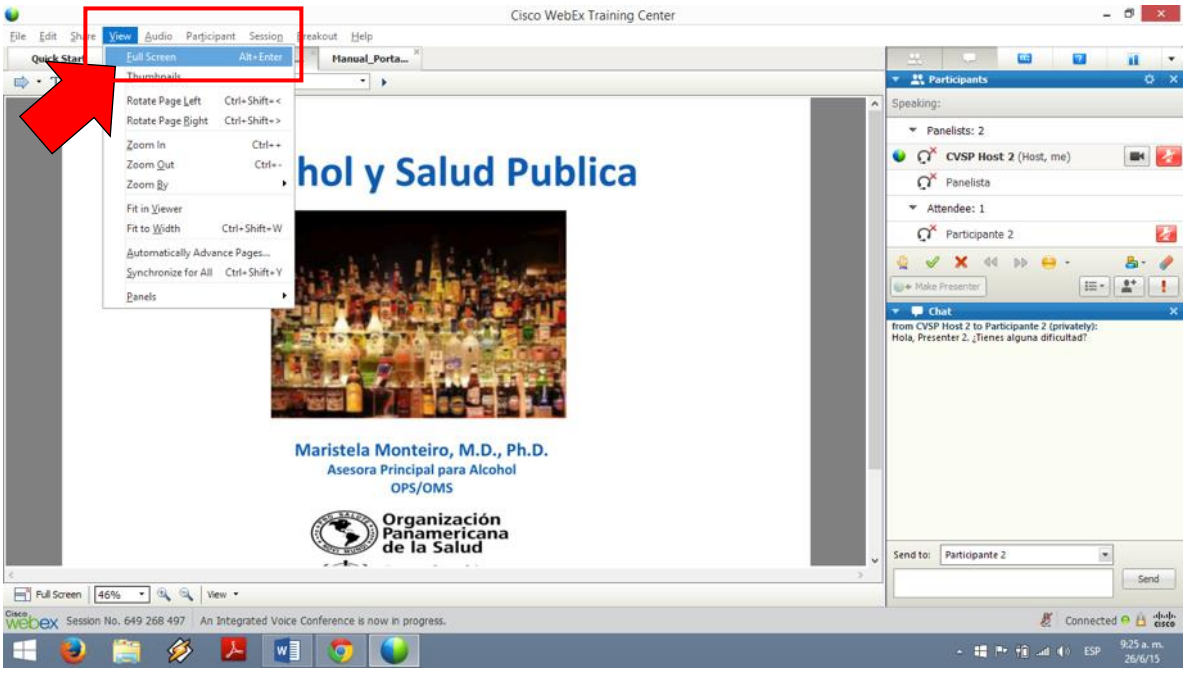


12.Closing one of the tabs of shared contents

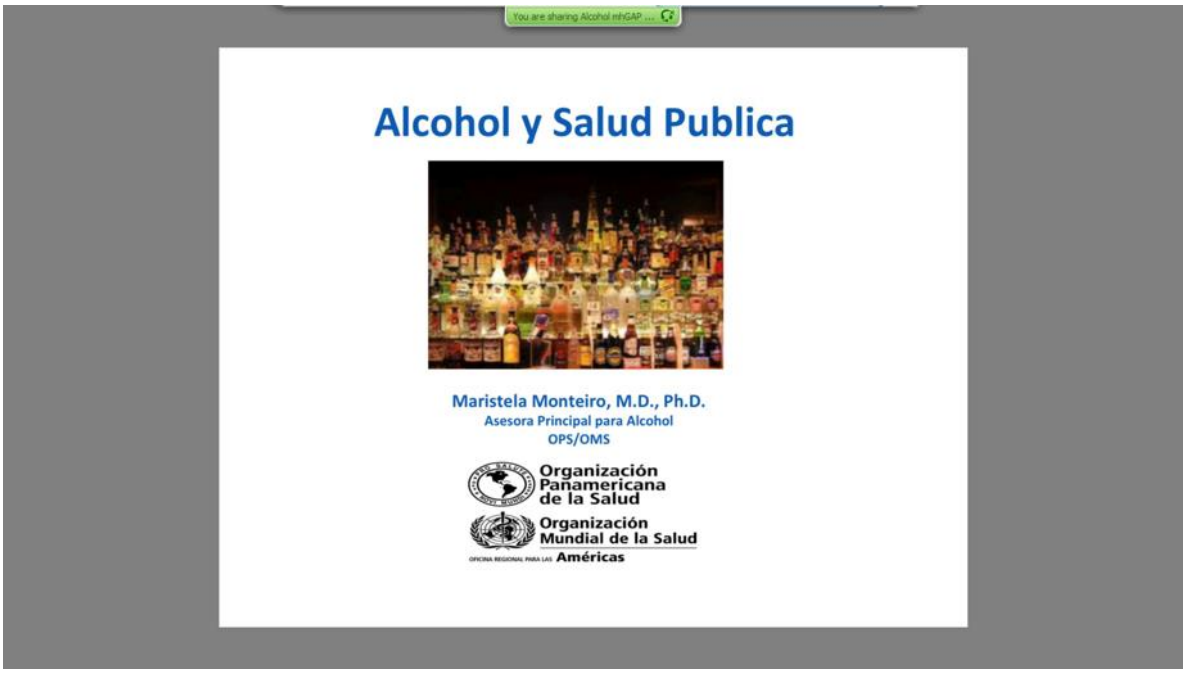
Click on the X of each tab to delete it. The system will ask you if you wish to save the document in your computer. In some cases, you will need to go back to the same contents later. If this is the case, then instead of closing the tab, you can change between the different contents.

13. Showing the whiteboard in Full Screen

The presenter can also click on **"View",** and then the **"Full Screen"** option**.**



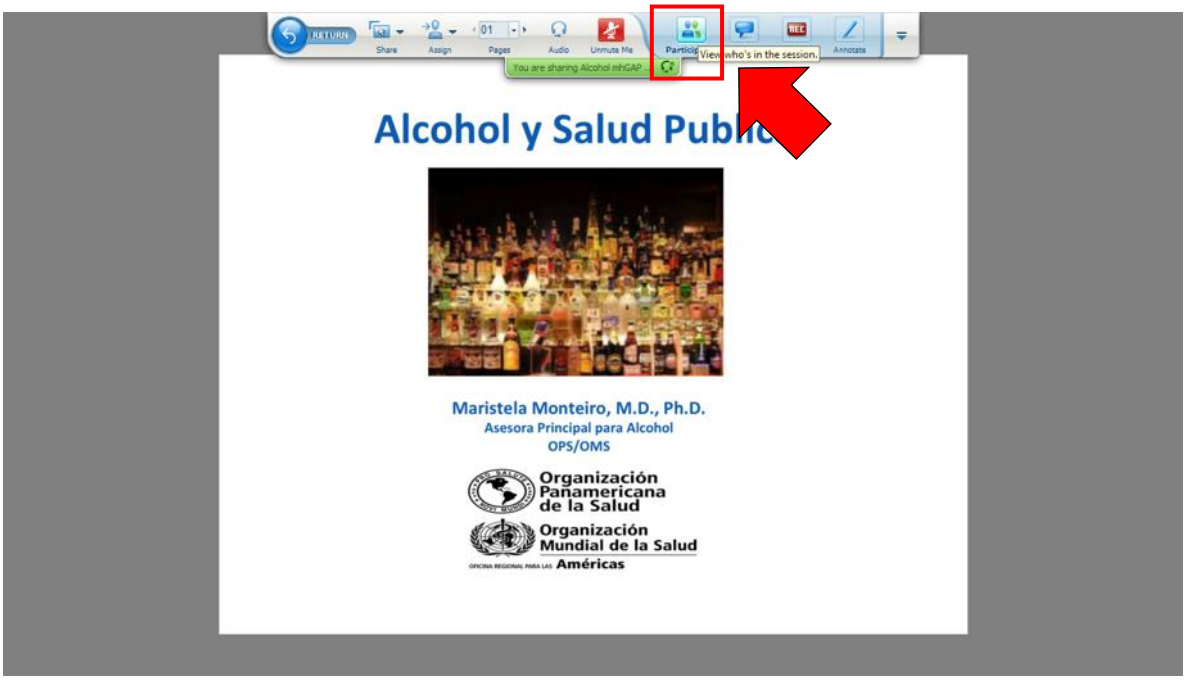
All participants will see the slides in full screen.



14. Activating the panels (chat, participants, microphone) when showing Full Screen

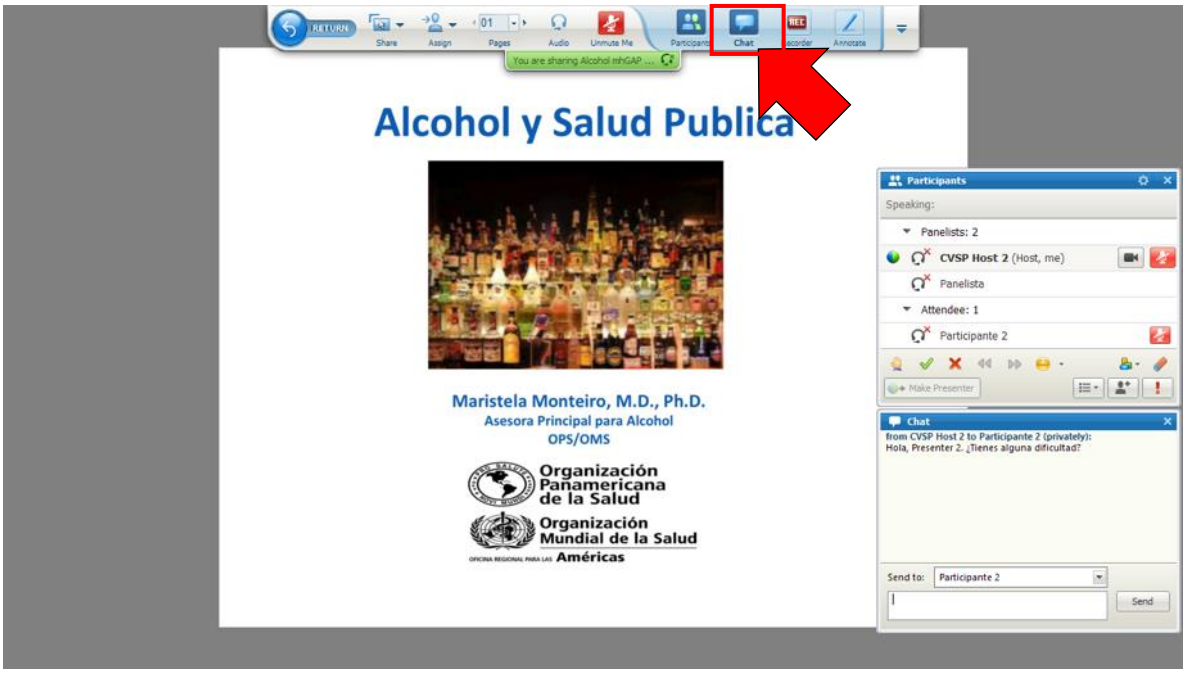
To view the chat, participant panels, and to activate/mute your microphone, hover the mouse over the green bar, and the different options will appear. You must explain this to the other attendees also.

If you wish to see the list of people, select the **"Participants"** icon**.**

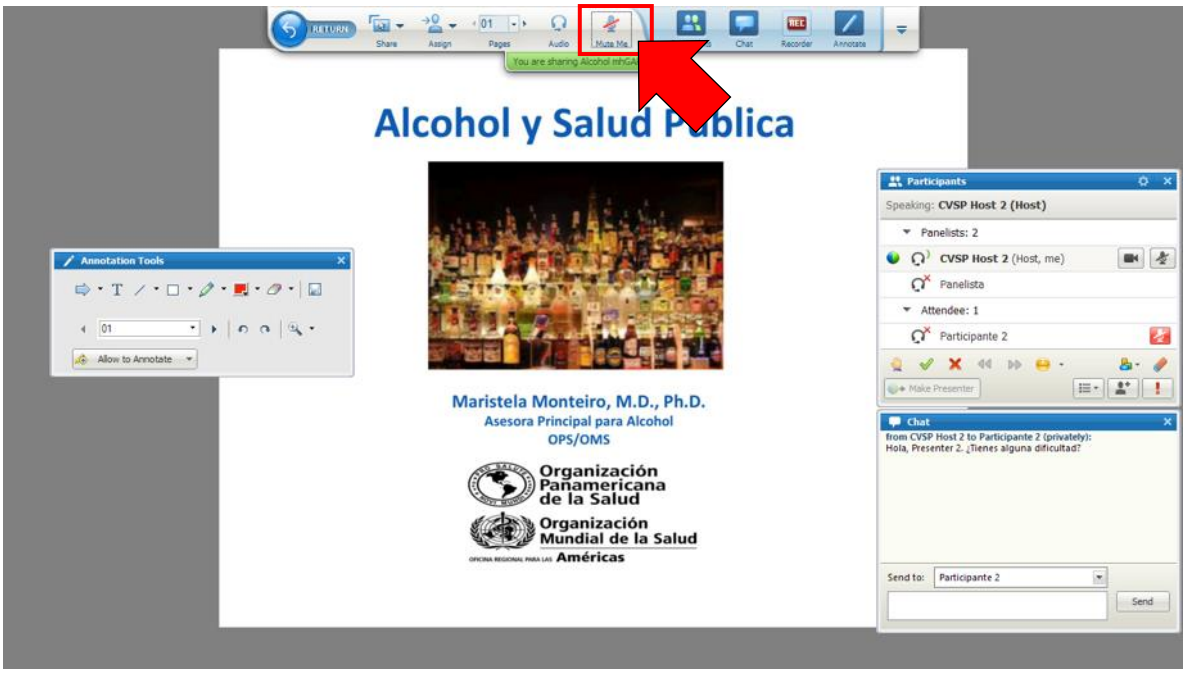


The panel will appear at the right hand side. You can move it around to the desired space.

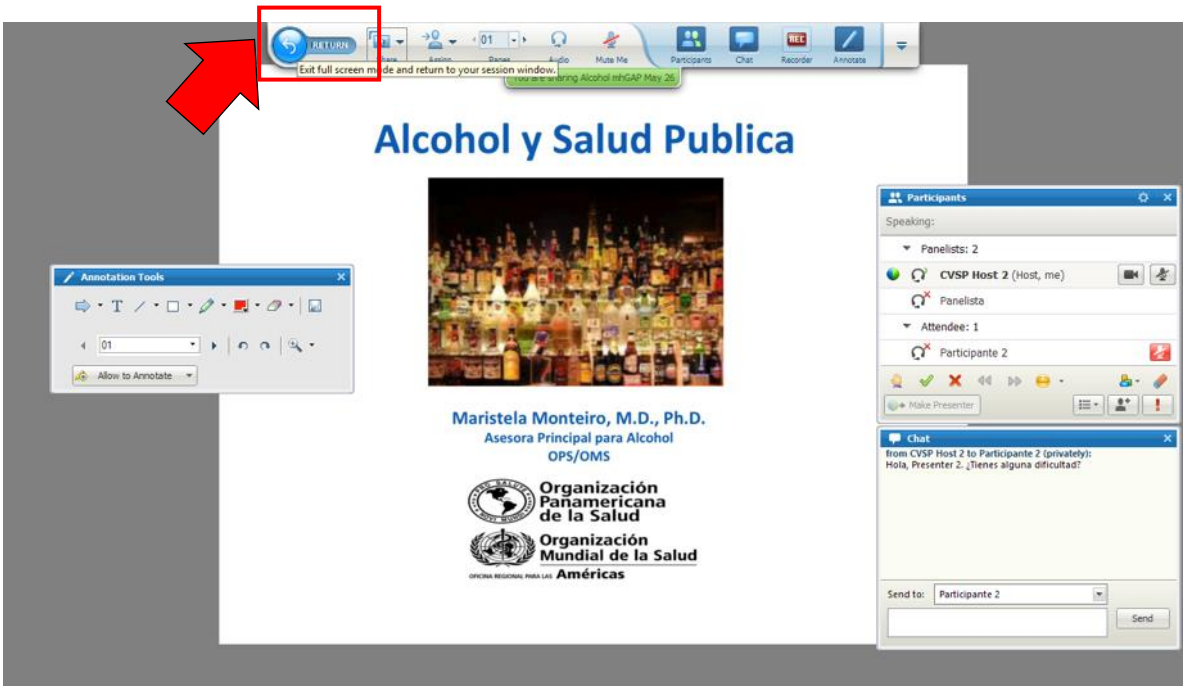
The **"Chat"** button does the same.



If you click on the microphone, then you can activate / mute your microphone.

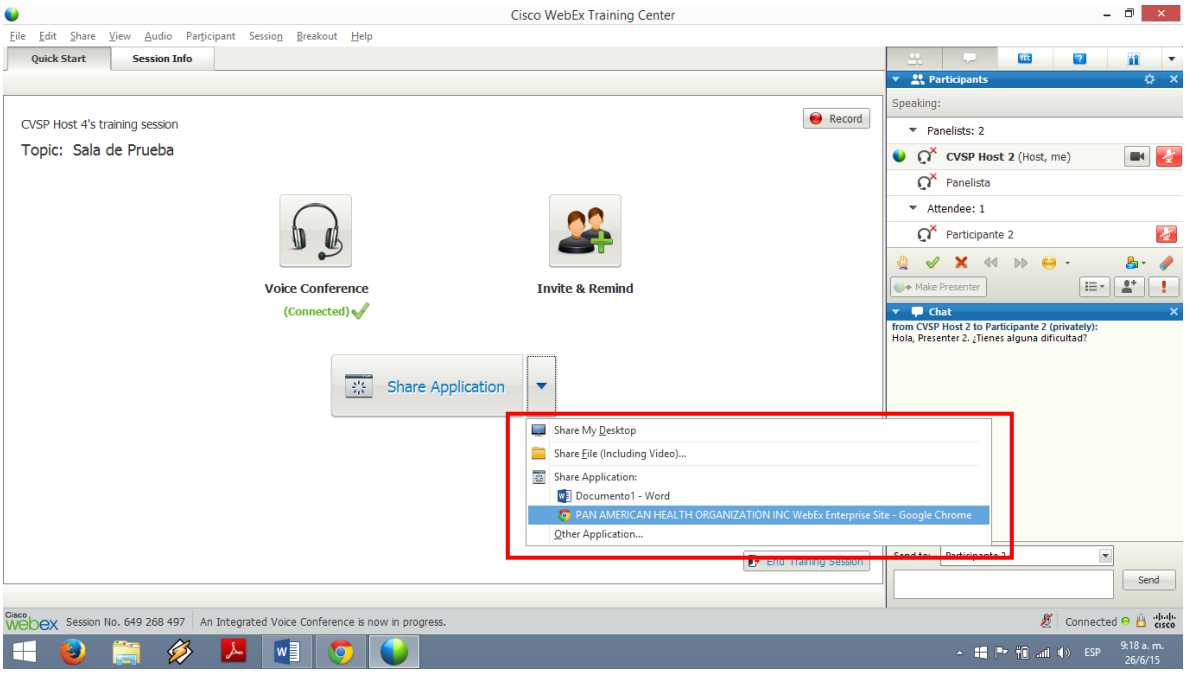


With the **"RETURN"** button**,** you will exit the full screen mode and return to the original window.



15. Sharing applications

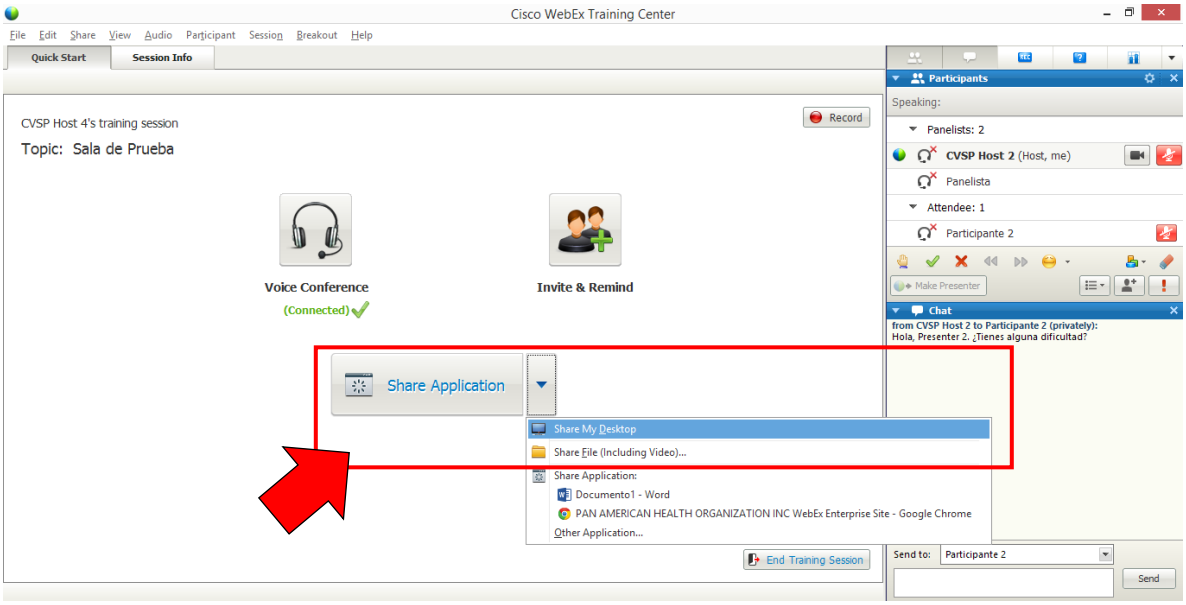
You can also share a specific application, for example, share your Google Chrome browser, or your Excel application window.



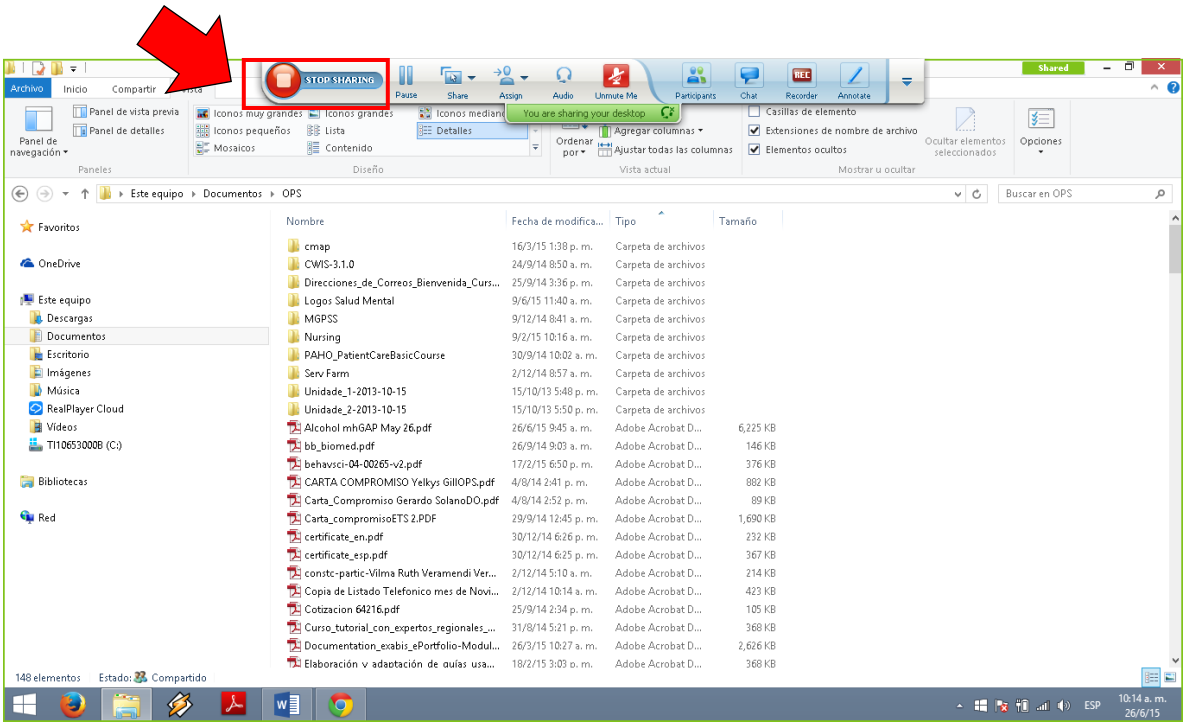
16. Sharing my screen / desktop

As a presenter (when you have the green/blue ball icon), you can click on the **"Quick Start"** tab**,** then the arrow next to **"Share Application",** and then **"Share My Desktop",** to share your desktop / screen.

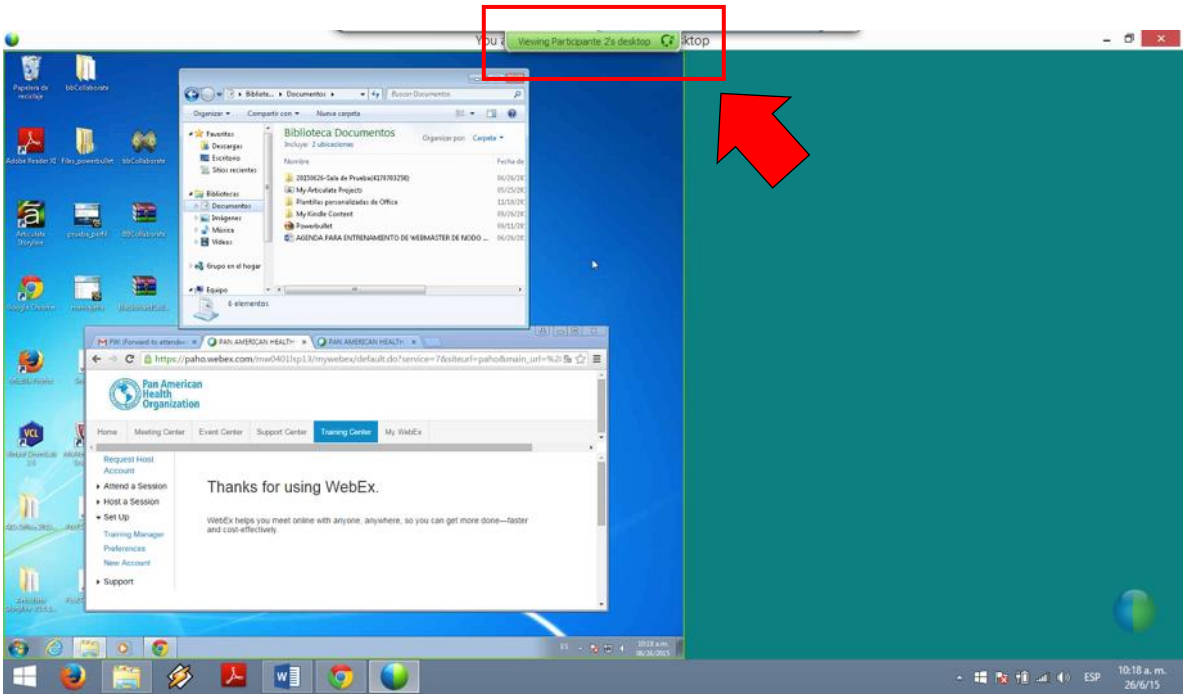
The other participants who are panelists in the room but don't have the Presenter role can only upload contents, they can't share their desktop or an application.



The window that the presenter has open in his / her computer, will be shown to all participants, in full screen. Click on the "**STOP SHARING**" button to exit.



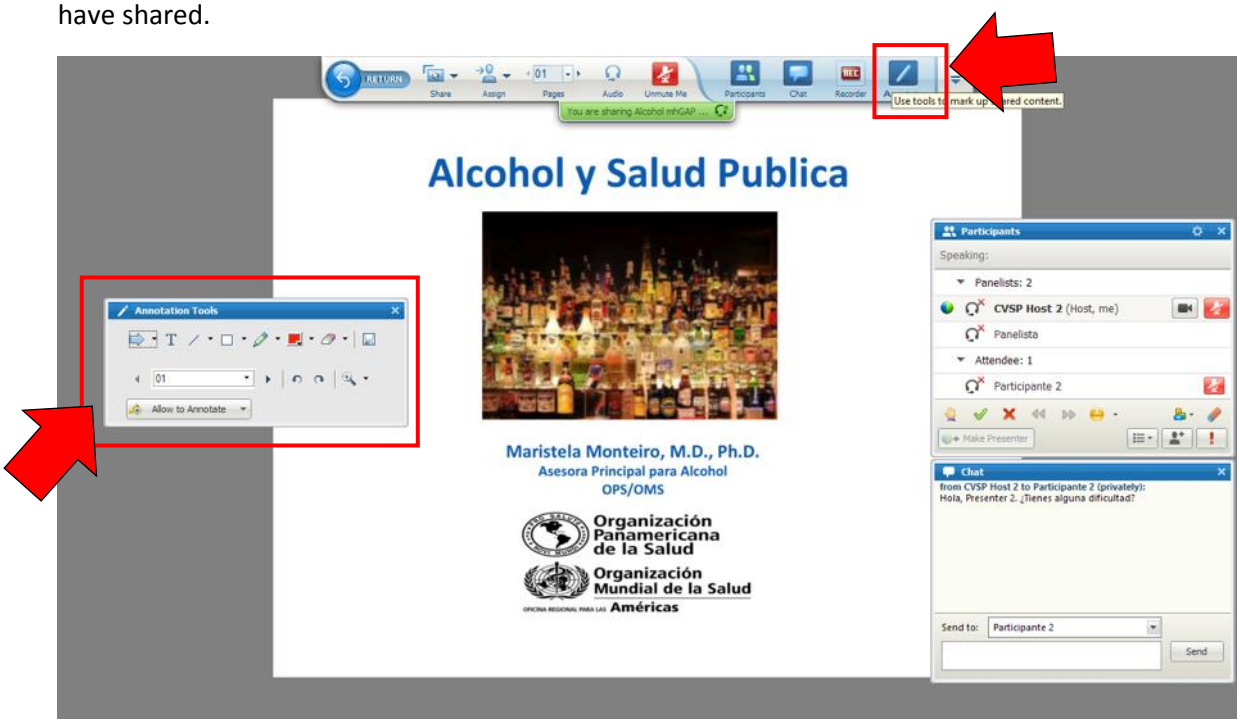
This is an example of what you will see when another person shares the screen:



Remember that the panels (chat, participants) disappear but you can enable them by hovering your mouse over the green bar.

17. Making annotations in the whiteboard

With the **"Annotate"** button**,** you will have different buttons to add marks in the contents that you have shared.



The other panelists can also place marks in the content being shared by the Presenter.

The participants can't make annotations.

Marks:

In the **"Annotation Tools"** options**,** the first button is used to place an arrow to highlight an important aspect. The name of the panelist who has placed the arrow will appear.

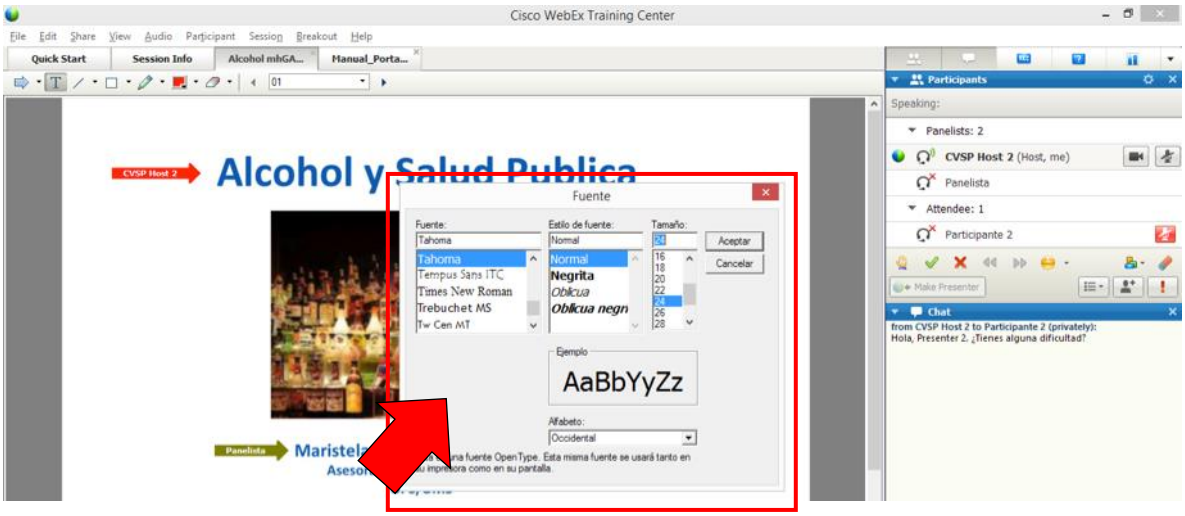
In this example, two panelists have placed marks.

Texts:

You can also add texts. Select the T icon. Click on where you want to add text. After you finish writing, click on any place outside, and the text will appear for all participants.

If you go to the menu, **"Edit",** then **"Font…",** you can change the style and size of the letters.

The texts that you add after configuring the options will have the selected font and size (the previous texts don't change, you would need to delete them and add them again).



Annotation Colors:

If you click on the following button, you can change the color of your annotation.

Eraser:

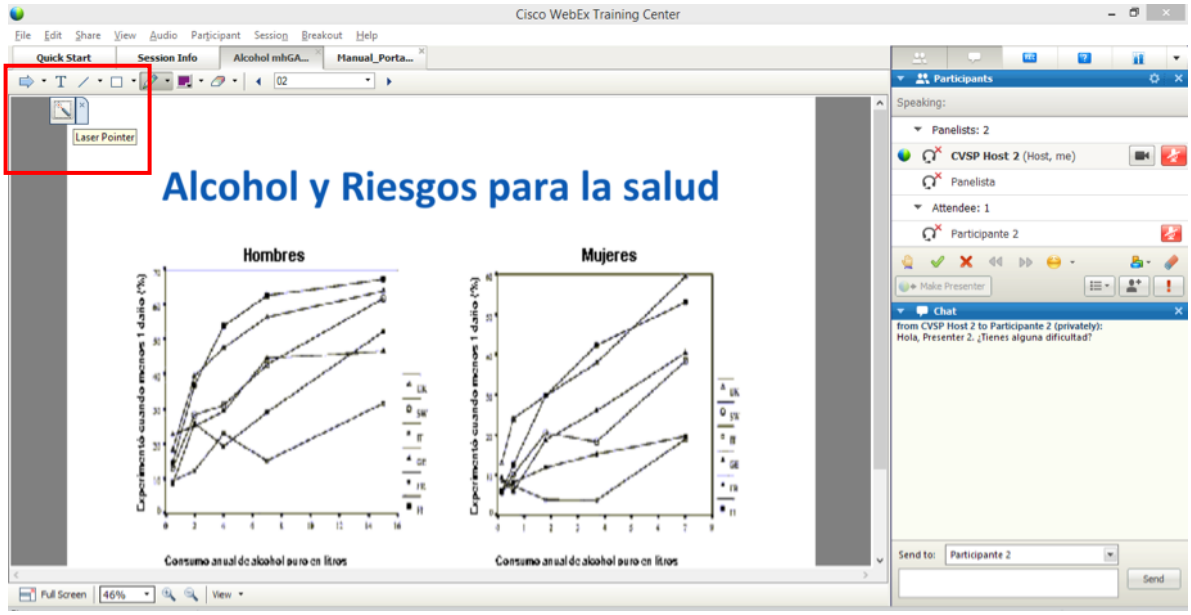
To delete one of your marks, click on **"Eraser".** Hover your mouse over the mark you wish to delete, and then click.

Pen/highlighter:

With this other icon, you can use a pen or highlighter, also selecting the color. In this example, we are highlighting the word "Alcohol" in green.

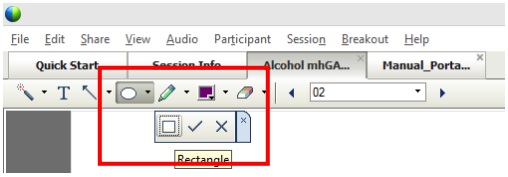
Laser pointer:

If you click on the arrow next to the first icon, while being the presenter, you will have another option called **"Laser Pointer".** This places a red dot in the whiteboard of all participants in the location of your mouse. This can be useful in case you want to signal specific aspects, for example in a graph.

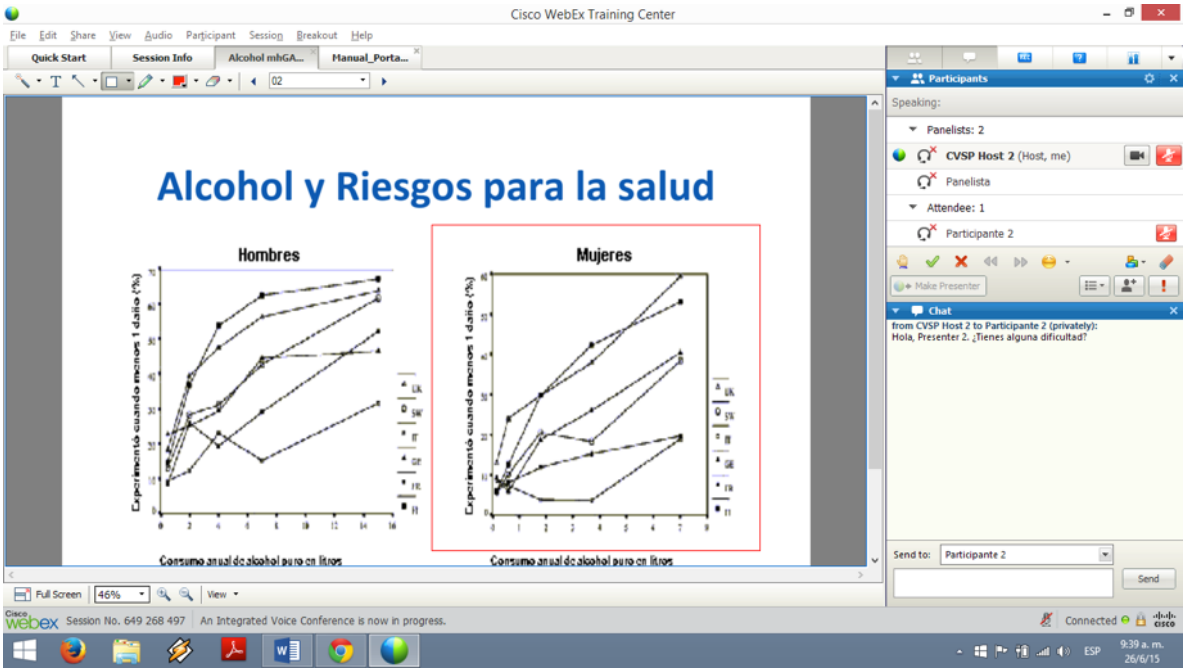


Shapes:

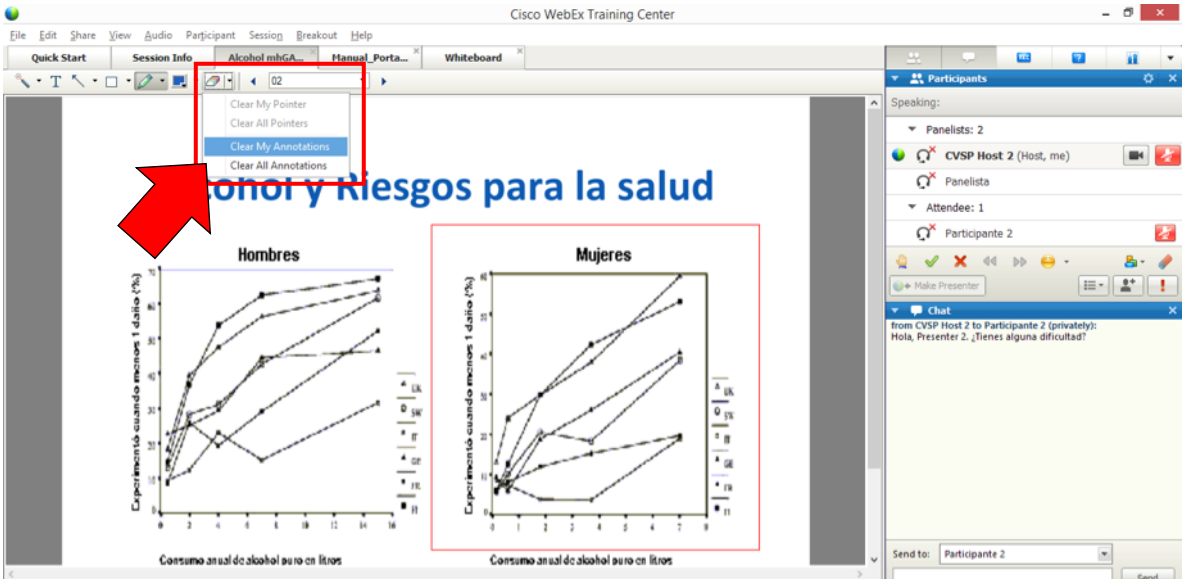
This button allows you to add rectangles, squares, etc.



For example:



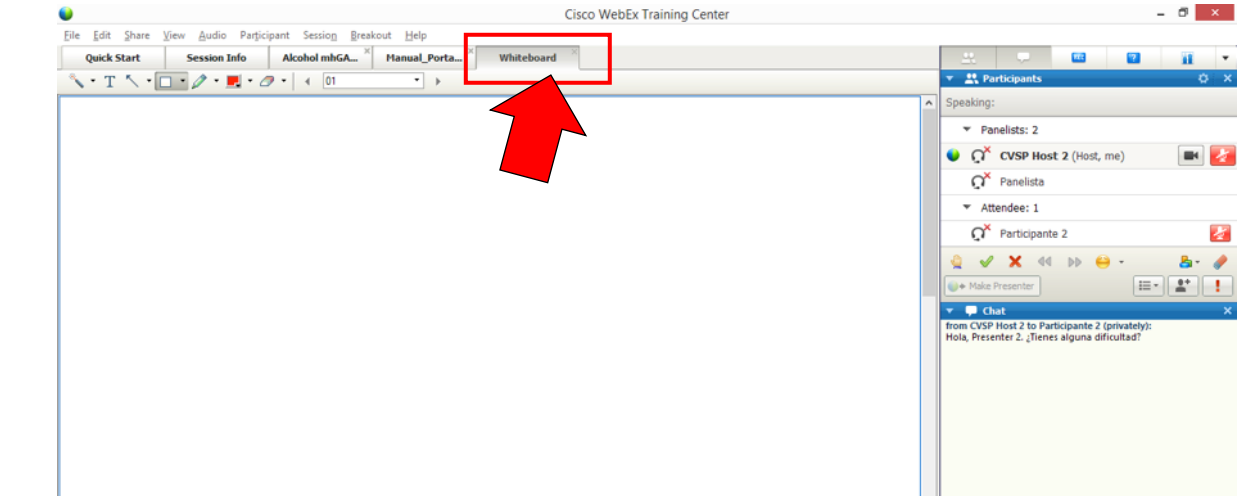
To delete all your annotations, click on the arrow next to the delete button, then **"Clear My Annotations"**, or, if you are the presenter, click on **"Clear All Annotations",** to delete the annotations added by all panelists.



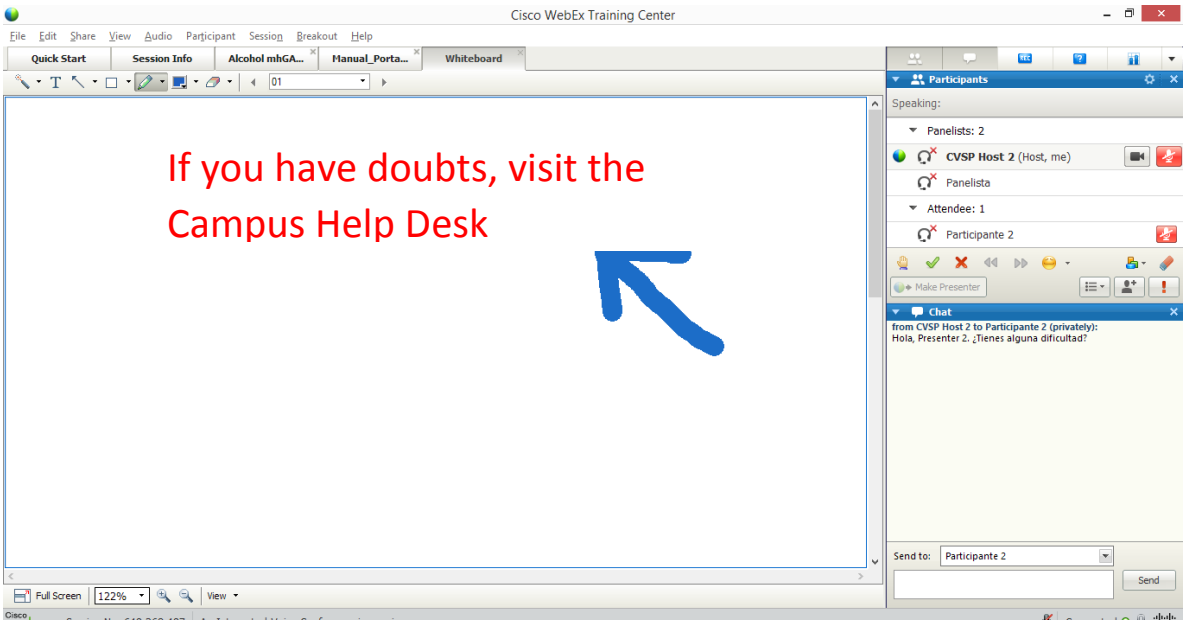
18. Opening a new blank page in the whiteboard

To open a new blank page, click on **"Share",** then the **"Whiteboard"** option**.**

This will open a new tab called **"Whiteboard".**



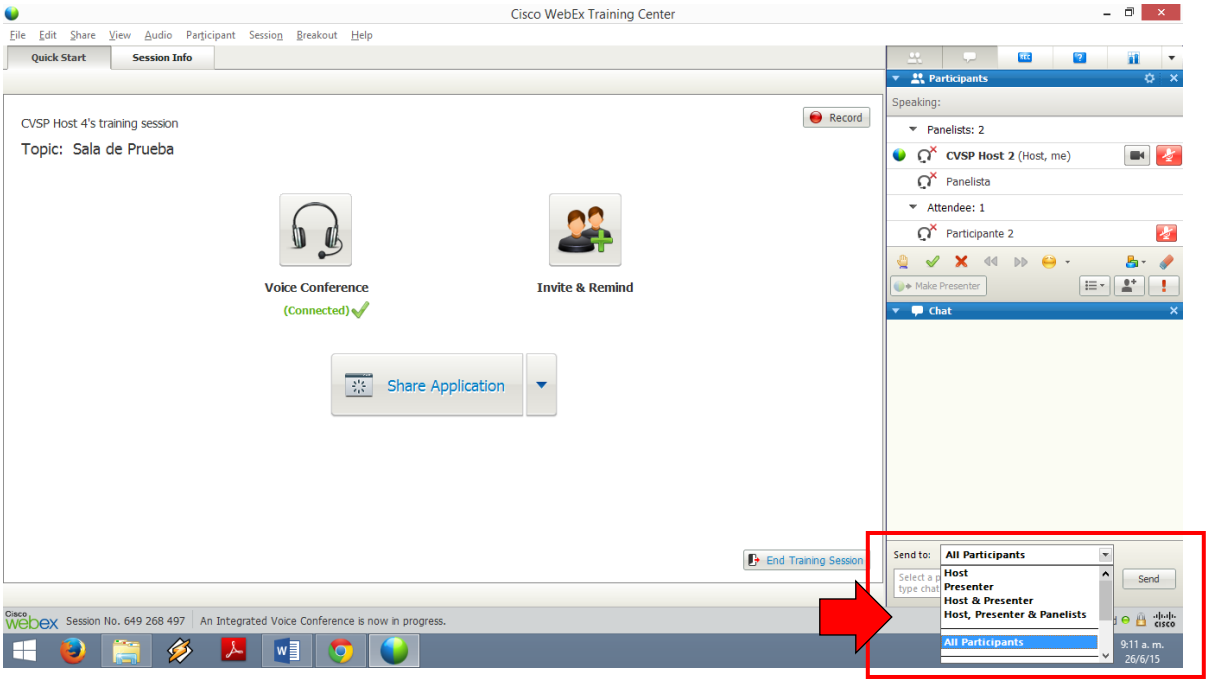
You can use all the tools that have been explained.



19. Selecting the recipients of chat messages

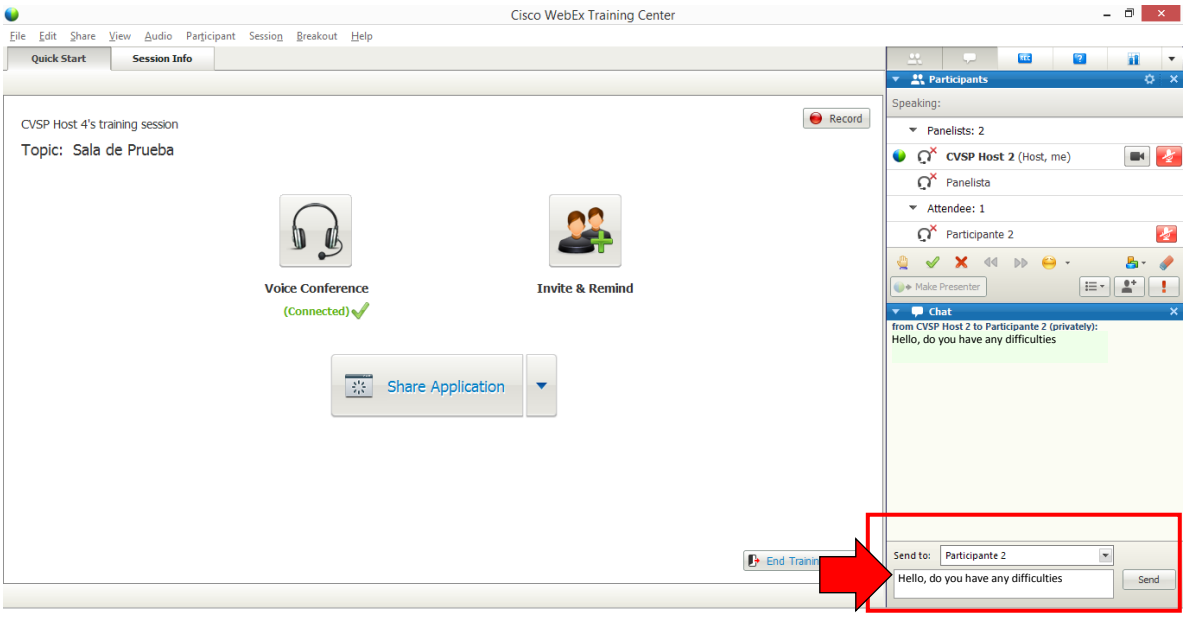
In the chat box, you can select whom you want to send the messages.

There are several options. You can select **Send to:** “Host”, “Presenter”, “Host & Presenter”, “Host, Presenter & Panelists”, “All Participants”, “All Panelists”, “All attendees”.



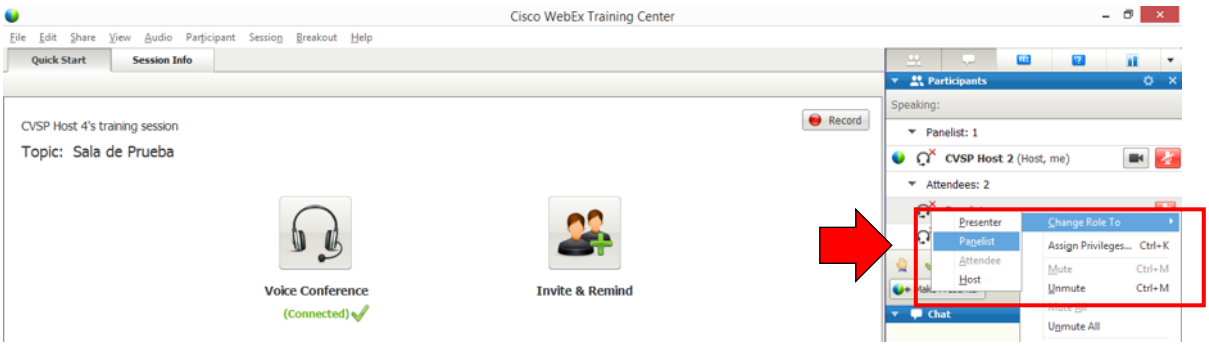
20. Sending a private chat

You can also select one person. In the following example, we are sending a private message to "Participante 2", asking if there are any difficulties:

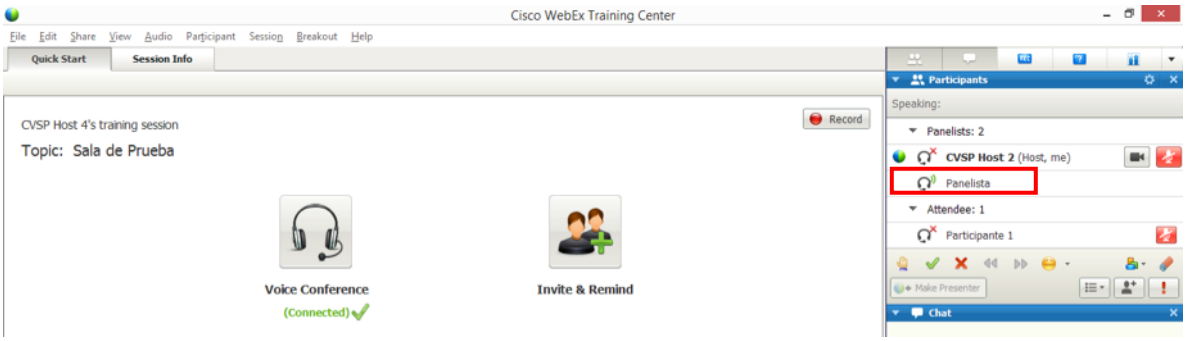


21. Changing an Attendee to panelist

To change a participant to the role of Panelist, right-click on their name, then select **"Change Role To"** and the option **"Panelist".**



Immediately, that person's microphone is activated (they should mute it if they are not speaking). The new panelist will have the additional options that have been explained.



22. Changing a participant to Attendee

To change someone to just an Attendee, right-click on their name, select the option **"Change Role To"** and then **"Attendee".**

Immediately, their name appears at the bottom.

23. Checking participants with raised hands

The Presenter and Host can see a number next to the raised hands, indicating the order in which the have raised their hands.

24. Using Yes / No answers

The panelists can see the number of participants who have selected each answer, by clicking on the button signaled in red. To clear the answers, click on the other button:

25. Closing the WebEx window

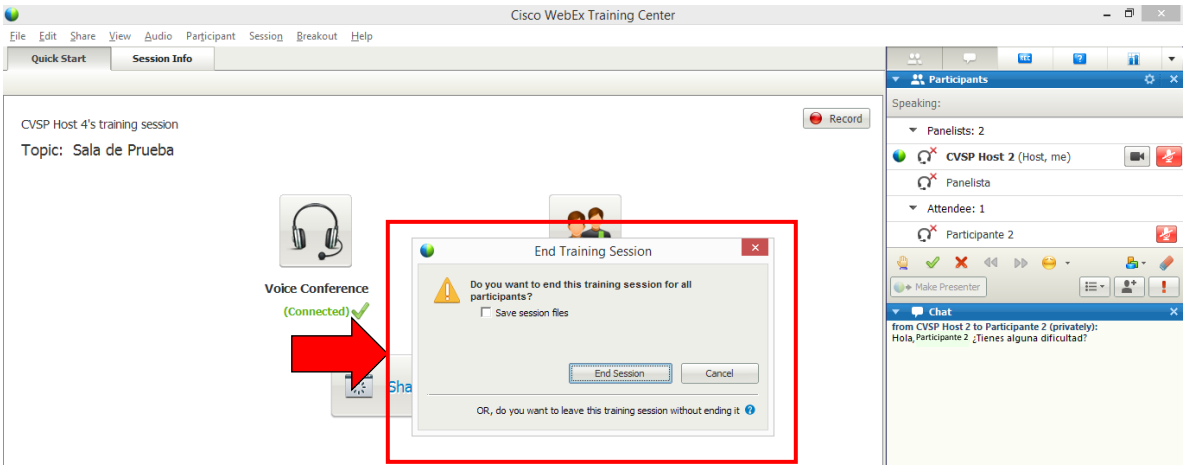
You can press the X button of your window. Or you can go to the menu **"Audio",** then **"Integrated Voice Conference",** then **"Leave Conference"** to exit.

26. Ending the session for all participants

If you are the Host of the session, you need to be careful because if you close the window, then the session will end for everyone. For this reason, you will see a warning message.

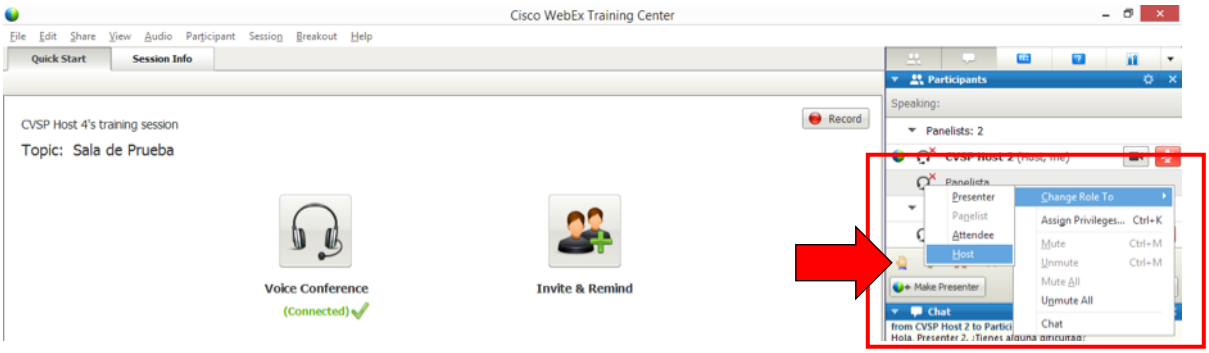
"Do you want to end this training session for all participants?"

In the case that you don't wish to end the session for everyone, you will need to pass the Host role to someone else (for example, another tutor or course coordinator).



27. Changing the role of Host to another person

To change the role of Host to another person, right click on their name, select **"Change Role to"**, then **"Host"**.



Observation: Once you have passed the Host role to another person, you can't recover it, except if that person returns the role to you.

Other options

28. Adjusting the volume of the microphone and speakers

Remember that through the menu **"Audio"**, option "**Integrated Voice Conference"**, then **"Volume"**, you can adjust the volume of your microphone and speakers. We recommend using headsets instead of computer speakers to avoid feedback and noise.

29. Testing the speakers and verifying microphone

You can also do a test of your audio, using the **"Speaker / Microphone Audio Test…"** option**.**

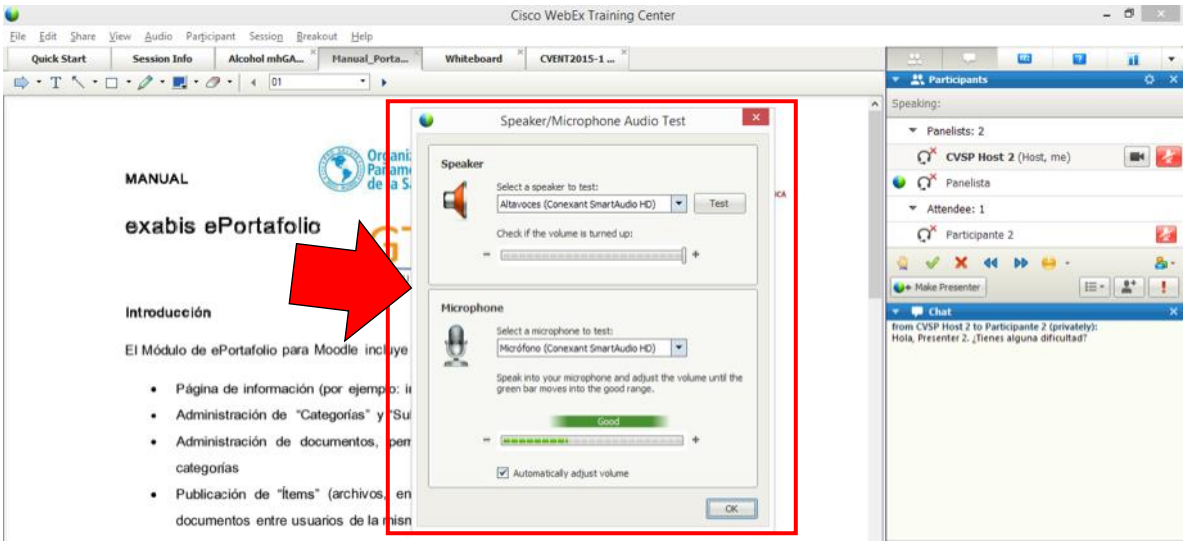
The **"Audio Test"** window appears. You can select the **"Speaker"** and the **"Microphone"** installed in your computer. You can change the volume.

Use the **"Test"** button in the Speaker section to hear a sound and be sure that you can listen.

In the case of the microphone, if you see that the bar moves to the green area, this means that your voice is being received with proper volume.

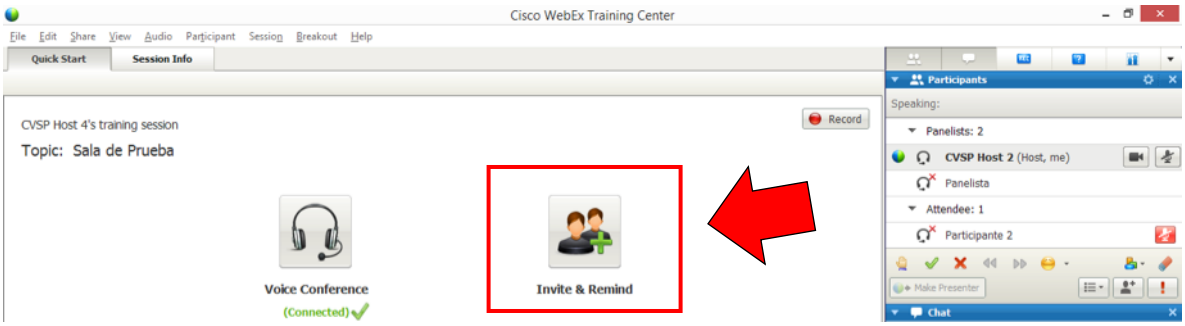
If the bar doesn't move, then select another microphone from the list. It is also possible that your microphone is not correctly connected or configured in your computer.

If you continue having difficulties and cannot solve the issues with your audio, ask for help from a technician or someone with more experience near you.

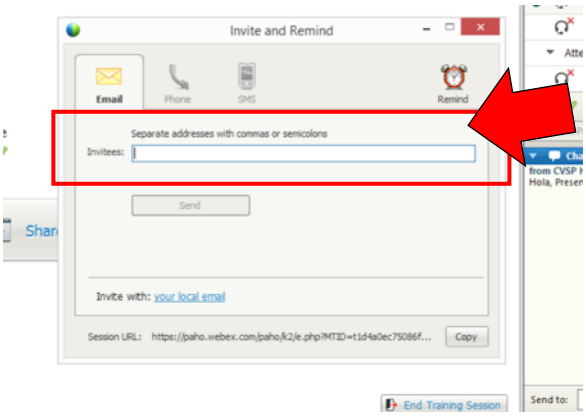


30. Sending a reminder of the session while inside the room

You can also send a reminder to the participants of the session. In the **"Quick Start"** tab, select **"Invite & Remind":**



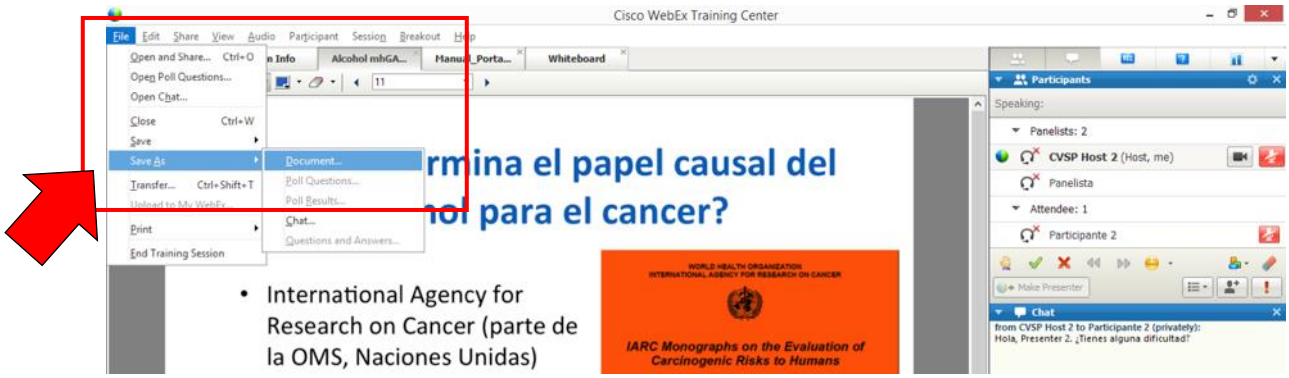
Then write the e-mail addresses, separated by a comma.



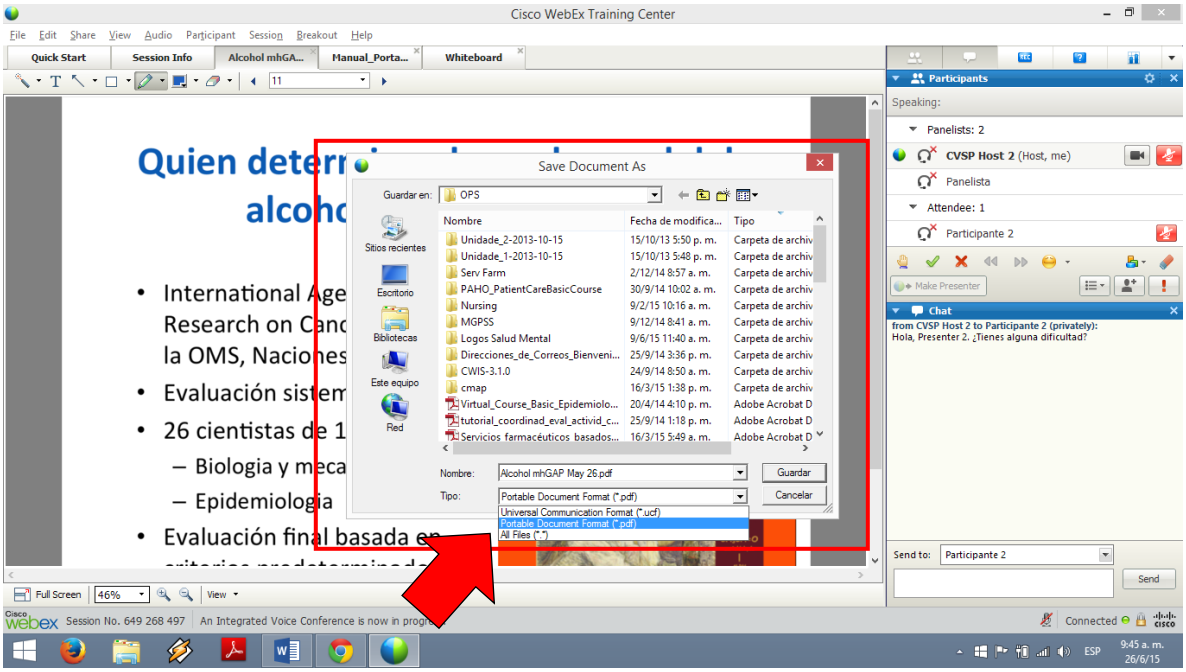
31. Saving the contents of the whiteboard

You have the option of saving the documents shared in the whiteboard.

Click on **"File",** then **"Save As".** Select **"Document".**

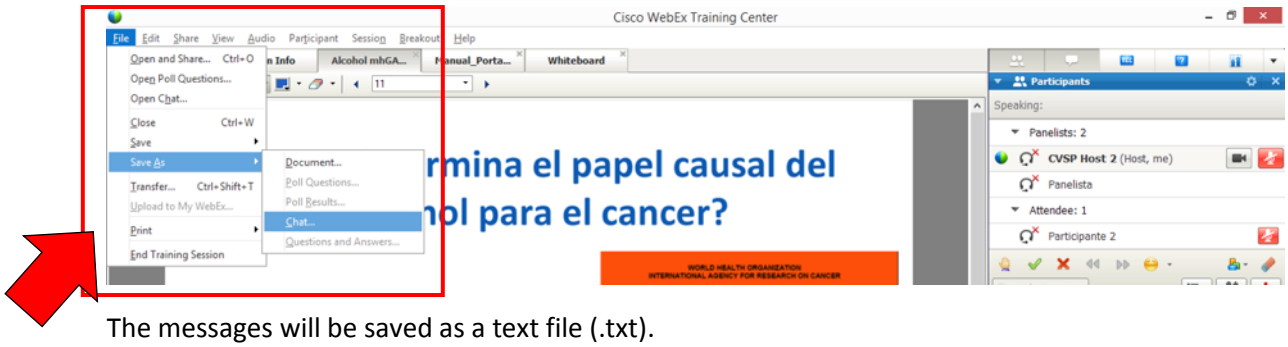


Select for example the option of saving as a PDF document.

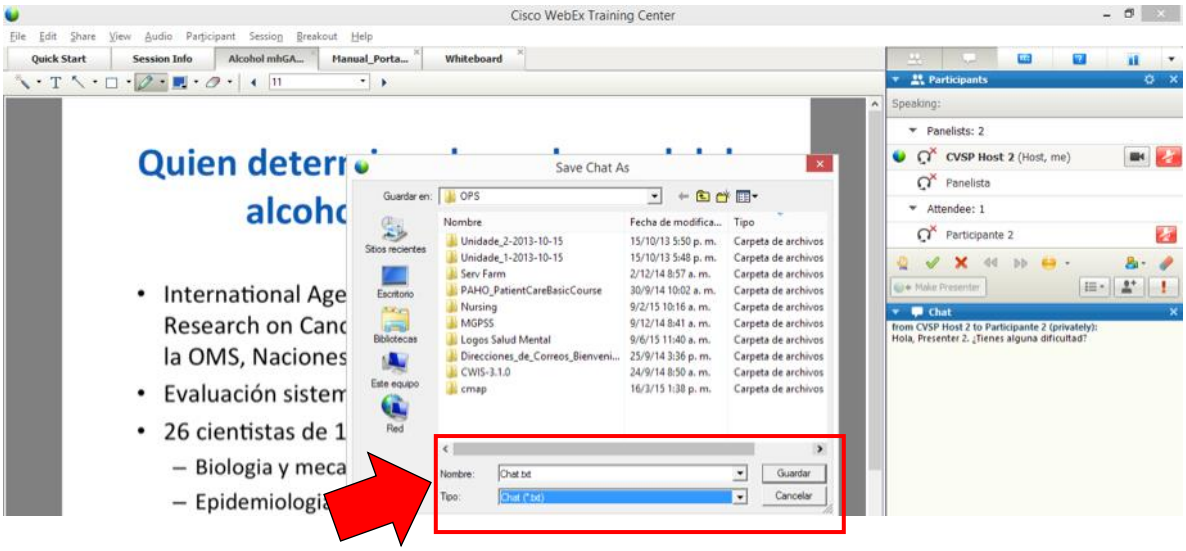


32. Saving chat messages

Chat messages can also be saved. Select **"Chat".**

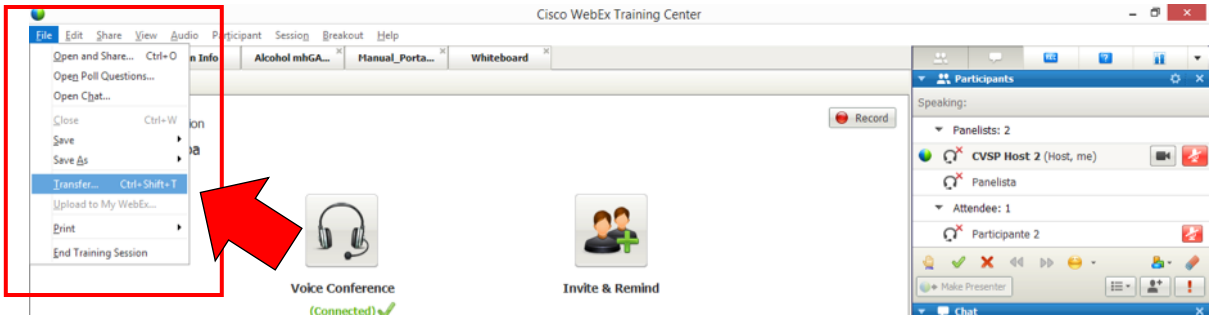


The messages will be saved as a text file (.txt).

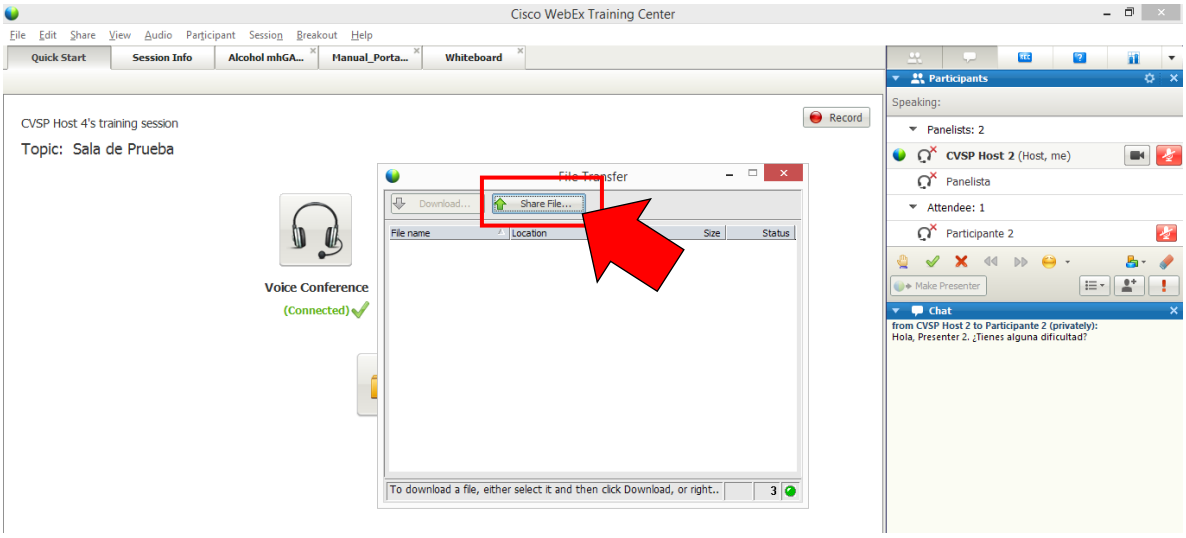


33. Transferring a file to participants

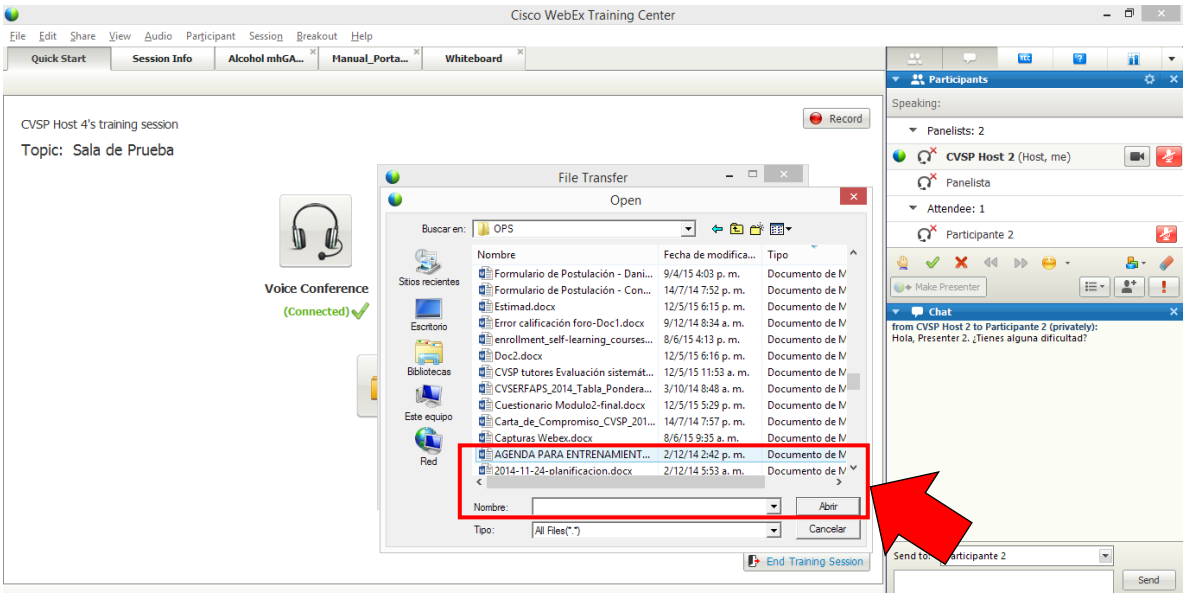
You can transfer a file to all participants. Select in the menu **"File"**, then **"Transfer…"**.



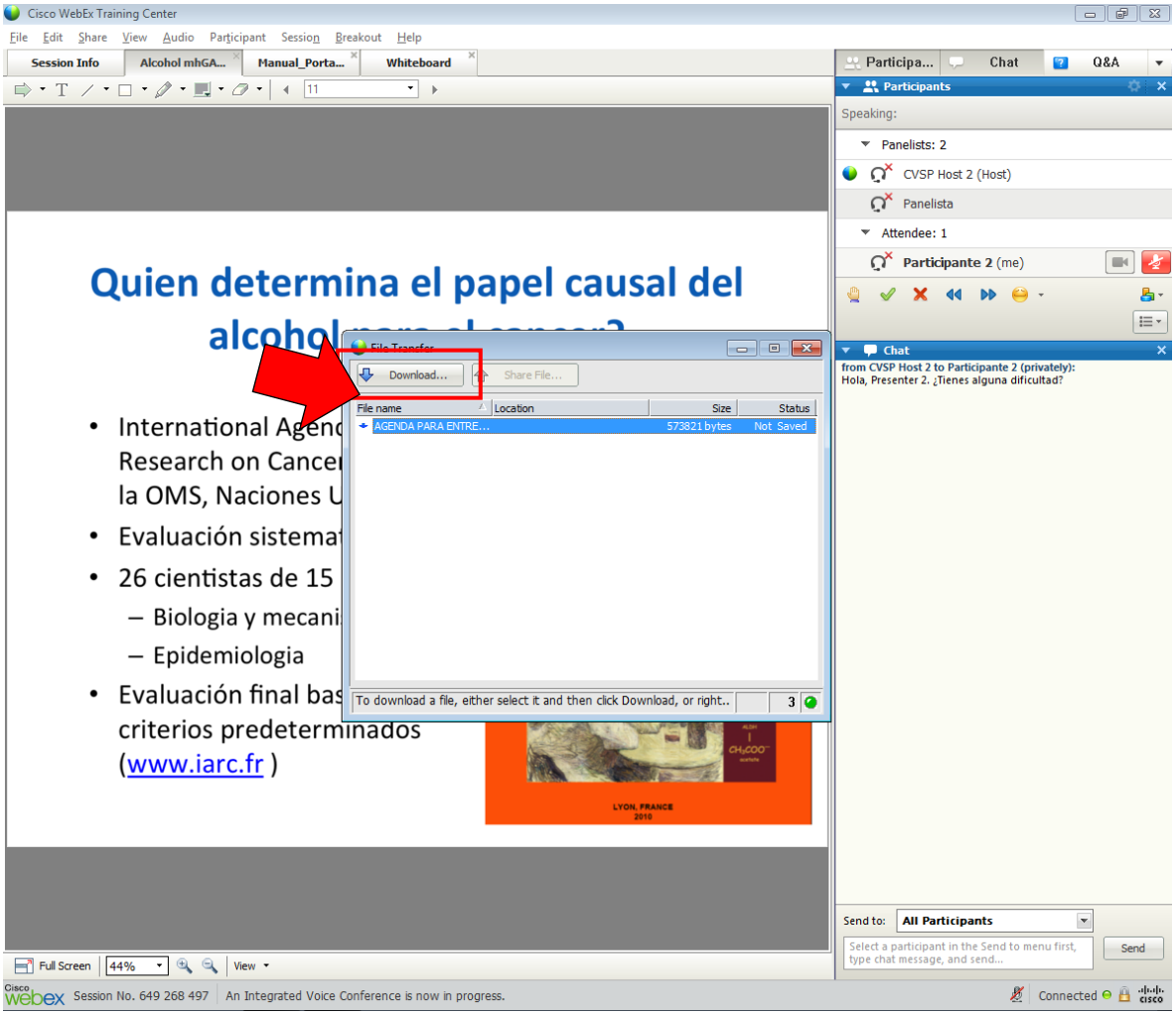
In the window that appears, select **"Share File…"**



Search for the file in your folders and press **"Open"**.

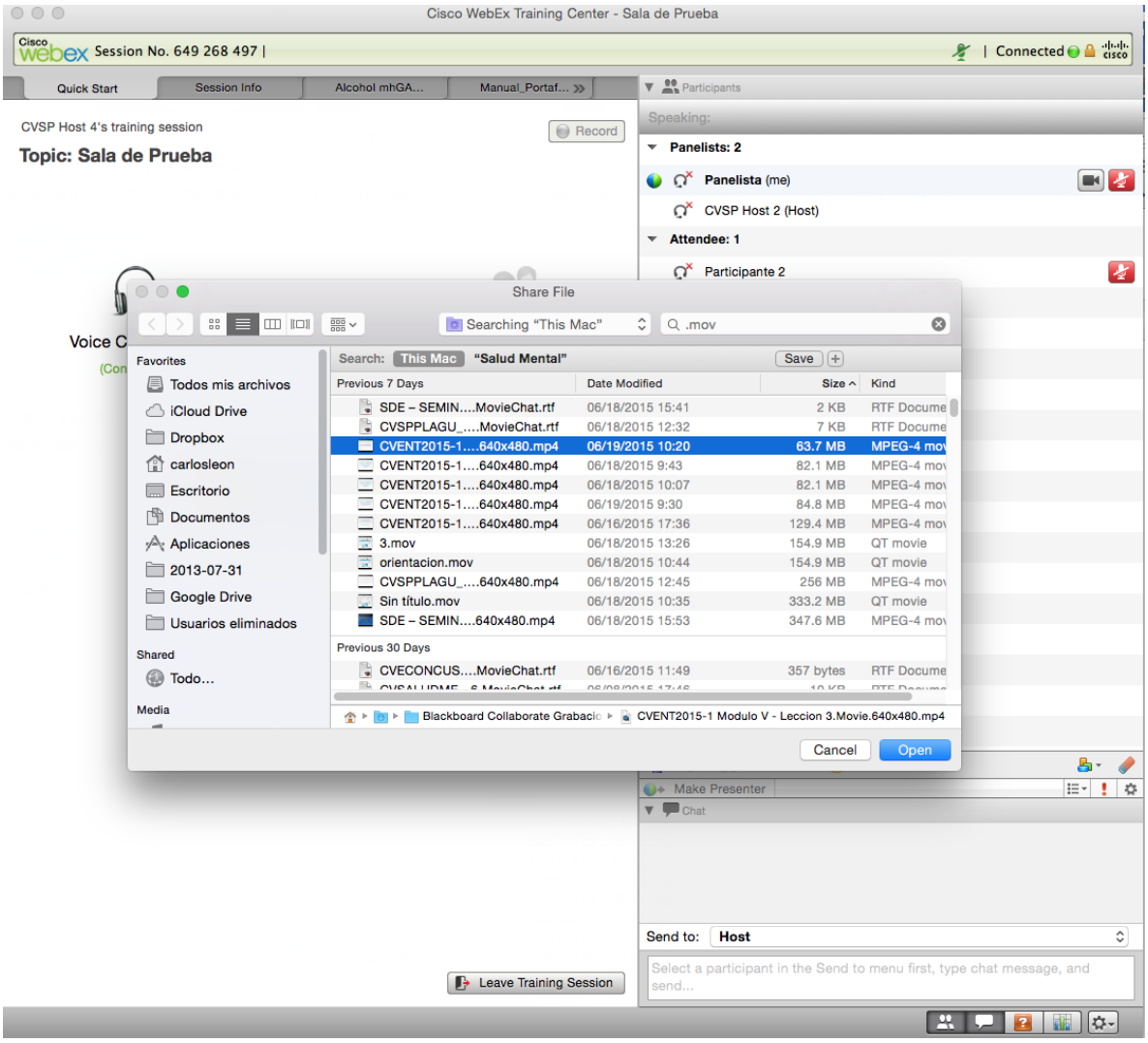


When a file is transferred, the participant has to click on **"Download".** This is the window that the student will see:



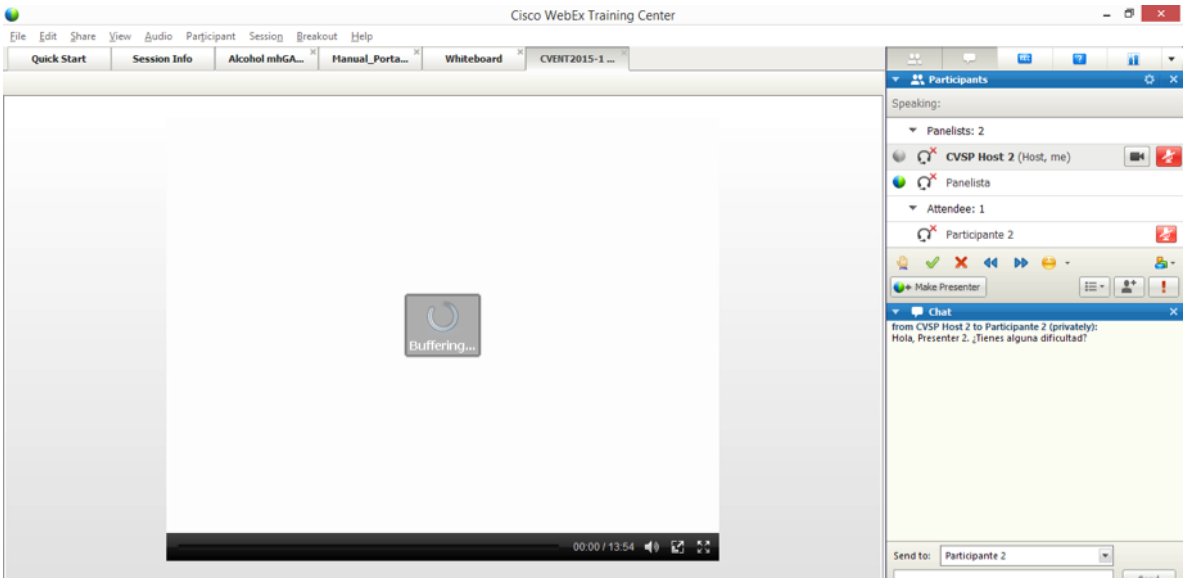
34. Sharing a video

A video can also be shared and streamed for all participants. For example, a file with the ".mp4" format.

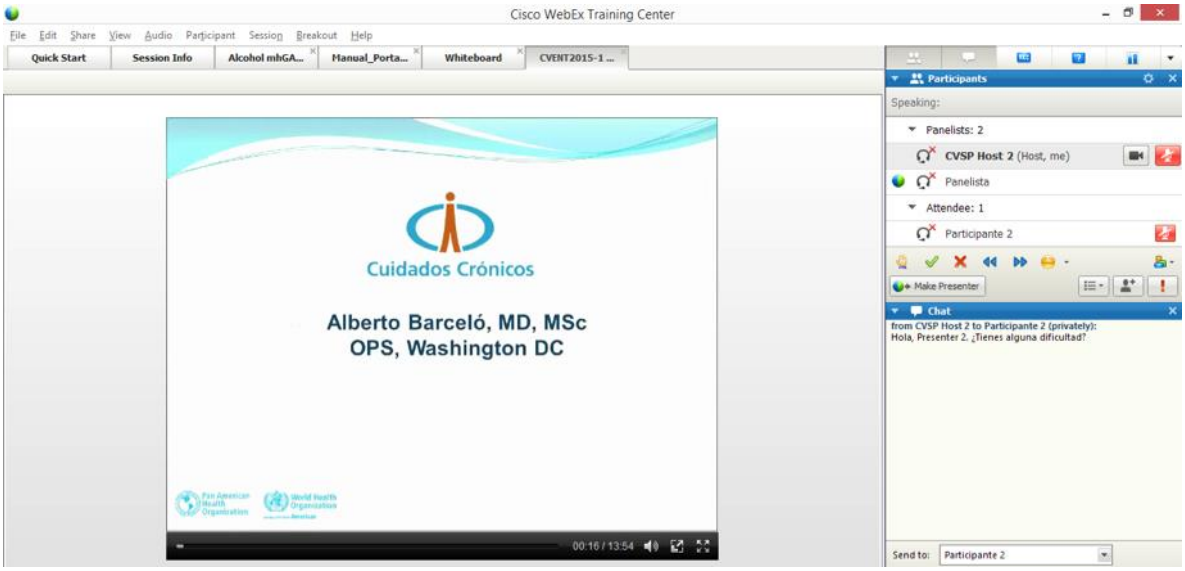


Only the presenter can share videos. The other panelists can upload contents (PDF, PPT), while the Presenter is sharing the content that all participants see.

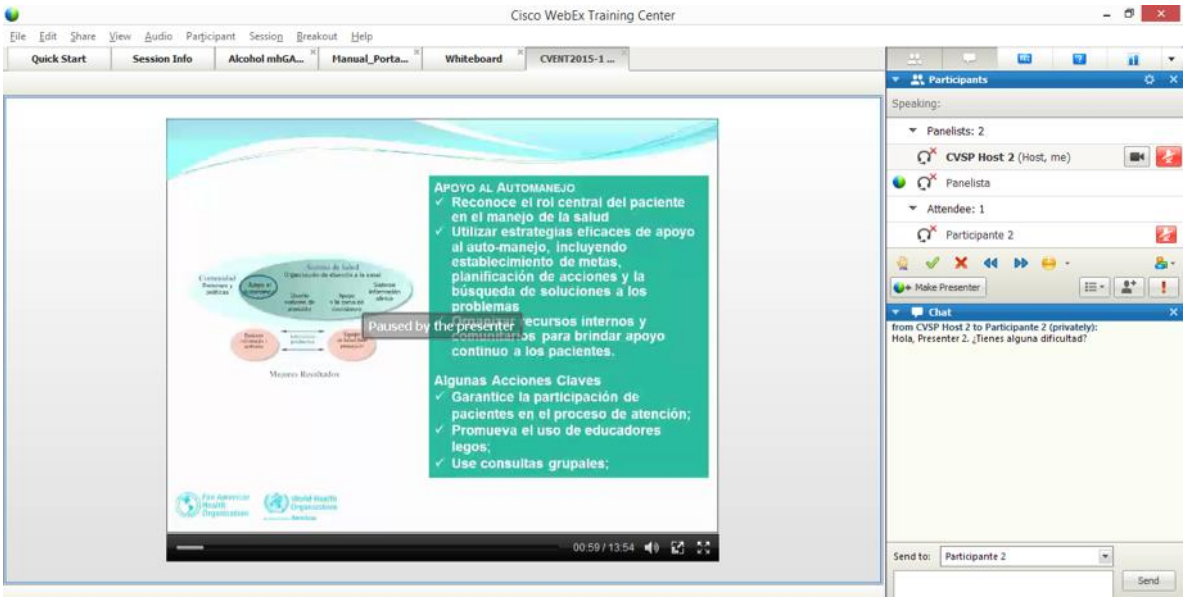
The video will begin downloading and when the presenter starts playback, all participants will watch the video “streaming”.



When the video has loaded (depending on the internet connection) it will start playing.



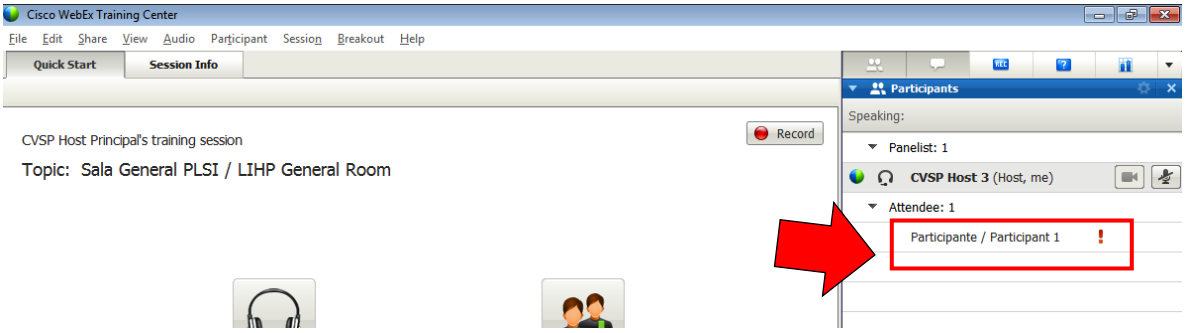
If the presenter pauses the video, it will be stopped for all participants:



35. Monitoring the attention level of participants

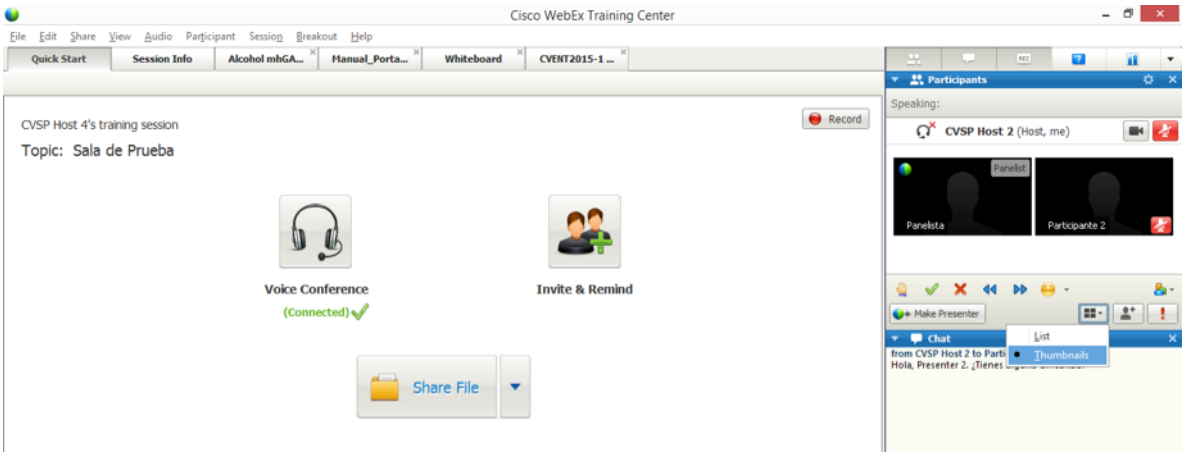
If you click on the red exclamation button, you will see the level of attentiveness of all attendees.

When a red admiration sign appears next to a participant's name, this means that he / she has changed to a window different from the WebEx room (is not paying attention).



36. Viewing the list of participants

You can also show the list of participants in panels.



In this example, one of the participants has turned on his webcam. Only the webcam of the person who is talking will be shown.