WebEx Training Basics: Getting Started Guide

WebEx Training is an online instruction platform that offers an interactive educational experience to engage learners. If you need additional assistance, contact Schaffer Library of Health Sciences at library@amc.edu or call 518-262-5532 to speak with a librarian, Monday – Friday, 9:00 AM – 5:00 PM

Creating a Training Session: Instant Session – Role: Host

An instant session allows an instructor to invite attendees immediately. Attendees are invited after a session is started.

Hint: Instant session can only be used for immediate session, not for scheduling future sessions.

1. Go to: https://albanymed.WebEx.com/
   - Albany Med devices use Explorer as the default browser for all WebEx platforms
2. Click the Log In button on the upper far right of the menu bar
3. Sign in with your Albany Med email address and password
4. From the selection tab menu, click on WebEx Training
5. From the left navigation menu, find Host a Session on the left navigation menu
6. Click Instant Session
7. On the Start an Instant Training Session pop-up complete the following:

   ![](image)

   - Topic: Add a name for the session
   - Set session password: Add an optional password
   - Listed on public calendar: Uncheck if desired
   - Audio Conference: Always check

1. Click Start Session icon
2. Accept automatic settings in Audio Conference Settings box

   ![](image)

   - Select Mute attendees upon entry if desired
3. Click on OK
Creating a Training Session: Schedule Training – Role: Host

Schedule training is more complex than Instant Session, but provides an instructor/host with the ability to invite attendees, create breakout rooms, and send agenda & documents prior to the session. Can be used to schedule future or immediate training sessions.

Hint: Use the advanced registration sparingly as it adds another level of complexity for the attendees and host.

1. Go to: https://albanymed.WebEx.com/
   - Albany Med devices use Explorer as the default browser for all WebEx platforms
2. Click the Log In button on the far right of the menu bar
3. Sign in with your Albany Med email address and password
4. From the selection tab menu, click on WebEx Training
5. From the left navigation menu, under Host a Session
6. Click Schedule Training
7. On the Schedule Training Session pop-up complete each section as outlined below:

<table>
<thead>
<tr>
<th>Session and Access Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic:</td>
<td></td>
</tr>
<tr>
<td>Set session password:</td>
<td></td>
</tr>
</tbody>
</table>

This training session is:
- Listed on public calendar
- Listed for signed-in users
- This session will have over 500 attendees
- Automatically delete session after it ends
- Send a copy of the attendee invitation to me

- Topic: Enter the session/class name
- Set session password: Enter a password if desired (optional)
- Check the following boxes:
  - Automatically delete sessions after it ends
  - Send a copy of the attendee invitation to me
- Hint: If you choose to click the Start Session icon now the defaults for the other sections will be in place. Continue to the review the other boxes.

<table>
<thead>
<tr>
<th>Audio Conference Settings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select conference type:</td>
<td>Webex Audio</td>
</tr>
</tbody>
</table>
- Enable and display toll-free number
- Display global call-in numbers
- Mute attendees upon entry
- Entry and exit tone: Beep

- Keep default settings
- Select Mute attendees upon entry if desired
• Enter the date and time information for the class”
• Time zone will adjust for students calling in from other time zones
• Attendees can also connect to audio conference should always be checked
• Occurrence specifies if the class will be multiple sessions or the same session offered multiple times
• Estimated duration indicates how long the class will last

• Do NOT require attendees to register unless absolutely needed as this adds an additional layer to the process
• If you do need a registration select Automatically approve all registration requests
• Hint: do not select registration if the session is scheduled to begin immediately

• Click on Invite Attendees button
Invite Attendees

Provide new attendee information here or select contacts from your address book.

Attendees to Invite

<table>
<thead>
<tr>
<th>Name</th>
<th>Email address</th>
<th>Phone number</th>
<th>Language</th>
<th>Time Zone</th>
<th>Locale</th>
</tr>
</thead>
</table>

No contacts selected.

New Attendee

* Full name: 
* Email address: 

Country/Region: 
Number (with area/city code): 

Phone number: 
Time Zone: New York (Eastern Daylight Time, GMT-04:00) 
Language: English 
Locale: U.S. 

- Add new attendee in my address book
- Invite as alternate host

Add Attendee

- An Invite Attendees and New Attendee pop-up box will appear
- For new attendees fill in each of the required boxes: Full name and Email address
- Select Add new attendee in my address book if you anticipate adding to future training sessions
- Click on Add Attendee icon
- Use the Select Contacts... icon on the upper right-hand side of the screen to add attendees who have been previously saved
  - Click the checkbox beside the attendee name(s) to invite
  - Select Add Attendee button when finished
- Attendees’ names will now appear in the Invited Attendees box on the main screen

Follow instructions to add presenters
- Presenters can also be assigned within the training session
Session Options

| Available features: | Chat, Poll, Video, View video thumbnails, Number of attendees, Send video, Attendee List, File Transfer, Presentation, App |

Destination address (URL) after session: [Edit Options...]

Greeting message: Customize greeting message when attendee joins

- Keep the default
- Optional: Add a personalized greeting by clicking Customize greeting message when attendee joins

Breakout Session Assignments Settings

In-session assignments (automatic or manual attendee assignments during the session) are always available. Participants on some mobile devices cannot join breakout sessions.

Options:
- Enable Pre-Session Assignment (specify automatic or manual attendee assignments before starting the session)
  - Automatically assign attendees during the session
  - Set the number of breakout sessions
  - Set the number of attendees in each breakout session
  - Manually assign registered attendees to breakout sessions (requires attendee registration to be enabled)

- Automatically assigned pre-session breakout sessions are useful if attendees aren’t required to be in the same breakout groups
- Use caution if choosing to manually assign registered attendees to a breakout session in advance as attendees must register first
- Recommended: Manually assign breakout groups in the active training session if possible

Email Options

You can select the types of email messages that you want to send by clicking Edit Email Options.

- Select additional e-mail options by clicking on the Edit Email Options buttons
- Keep default of all options selected
- Click on option to edit the email content
- Hint: Provides automatic e-mails for certain system functions, such as, inviting, reminding, and rescheduling training sessions
• The final three sections, **Session Information**, **Course Material**, and **Tests**, provide the opportunity to add an agenda, session description, attach documents, and add pre/post-tests to the session

• **HINT:** Presenters can share their screen within the session, so required material that is in Sakai can be shared to all attendees without having to attach documents to the invitation

8. Save template for future use by clicking on the **Save as Template** button

9. Finalize by selecting either **Schedule** for a future session or **Start Session** to begin immediately
WebEx Training: Main Panel Presentation

All the teaching functionality you need to run a session is found on the first page that opens. Only the panelists see this page, the attendees do not.

Hint: Consider having two panelists: one as the presenter who teaches the training session, and another, who can take care of the non-instructional functions such as adding attendees to breakout rooms, changing roles, and monitoring the chat for questions.

Additional information: https://help.WebEx.com/ld-mzc23k-CiscoWebExTraining/WebEx-Training#Get-Started

Invite & Remind - Role: Host

The Invite & Remind icon is used to invite attendees in an Instant Session and to add additional attendees to a scheduled training.

Hint: Use to manually remind attendees to attend if any are missing at any time during the session.

To Invite:
1. Click on the Invite & Remind icon
2. Invite attendees using their e-mail address
3. Separate attendee emails using a comma or semi-colon
4. Click on Send

To Remind:
1. Click on the Invite & Remind icon
2. Click on the Remind alarm clock icon

To Copy Session URL:
1. Session URL is provided at the bottom of the Invite and Remind pop-up box
2. Click on the Copy icon to save to send separately
Define Roles – Role: Host

There are two participation categories separated into four roles. The first category is Panelists, which is for three roles: host, presenter, and panelists. The Panelists roles should be reserved for faculty and coordinators. The final category and role are Attendee which is the students. The names of the participants appear in the Participants drop-down on the right-hand side of the screen.

Hint: The Host and the Presenter roles have the most authority in a training session.

The following is a broad breakdown of rights by role:

**Host:**

1. Schedules the session
2. Begins with the Presenter role but can share with others
3. Schedules breakout sessions
4. Invites and reminds attendees
5. Assigns and changes roles
6. Ends session

**Presenter:**

1. Shares screen
2. Changes roles
3. Visits breakout sessions

**Panelist:**

1. An instructor who will be made a Presenter at some point during a meeting
2. Visits breakout sessions

**Attendee:**

1. A student
Change Roles – Role: Host/Presenter

This option is used when a session has more than one instructor who needs to share slides. The presenter has the authority to add roles.

Hint: Only a host can make another participant the host.

1. Open Participants on the right-hand side of the screen
2. Highlight the name of the person who will be changing roles
3. On the menu bar, click Participants
4. Click Change Role to
5. Select the desired role: attendee, panelist, presenter, host
6. Repeat as necessary throughout the session

Video and Audio – Role: All

Audio should be enabled when creating a session. However, video is in the hands of each participant.

Hint: When returning from a breakout session, video must be turned back on if desired.

Instructions:
To Start Video – Role: Participants

1. Open Participants on the right-hand side of the screen
2. Click the video camera icon beside your name

To Mute All – Role: Host

1. Go to Participant Menu
2. Select Mute all

Share Screen, Documents, Apps – Role: Host/Presenter

A presenter can share desktop screens and documents with the attendees to support the training session.

Hint: Sharing the desktop provides the most flexibility of the options listed. Be sure to close any open windows that you don’t want visible to others prior to sharing.

Instructions:
To Share Desktop:

1. Click on the Share My Desktop icon to automatically start sharing, OR
2. Click on the drop-down arrow beside Share My Desktop to select what to share

To Stop Sharing:

1. Hover over You are sharing your desktop box that appears on the top of your screen
2. Click Stop Sharing
Recording – Role: Host

It is possible to record a training session to view later. Contact Library Tech Help for help adding your recording to Mediasite for posting on Sakai at LibraryTechHelp@amc.edu or 518-262-2817

Hint: There can be a delay of a few hours before your recording appears on your recording list.

To Start Recording:

1. Click the Recorder icon on the top right-hand side of the screen
2. Click the Start button that appears in the pop-up box
3. Pop-up box will remain in your window
4. Pause and Stop buttons are in the pop-up box

To Stop Recording:

1. Click on the Stop icon
2. A pop-up will appear to ask you to verify

To Access a Recording after a Session Ends:

1. Click the WebEx Training tab on Albany Med’s WebEx site: https://albanymed.WebEx.com/
2. Go to Host a Session on the left-hand side panel
3. Open My Training Recordings
4. Select the recording to view

Chat – Role: All Participants

It is possible to send chats throughout the session. It is helpful to ask one panelist to monitor the chats to avoid missing a question.

Hint: Be sure to check who the message is going to prior to sending to maintain privacy.

1. Open the Chat icon on the top right-hand side of the screen
2. Choose default option All Participants, OR
3. Click on the drop-down box for other options:
   a. Host
   b. Presenter
   c. Host, Presenter, Panelist
   d. All Participants
   e. All Panelists
   f. All Attendees
4. Type message in box
5. Click Send icon
Leave/End a WebEx Training Session – Role: All Participants

Only the host can end the training session, although participants can leave at any time.

To End a Session – Role: Host

1. Click on the End Training Session link in the bottom right hand corner
2. Accept the pop-up prompt to end

To Leave a Session – Role: Presenter, Panelist

1. Click on the Leave Training Session link in the bottom right hand corner
2. Accept the pop-up prompt to leave

To Leave a Session – Role: Attendee

1. Click on File
2. Select Leave Training Session link in the bottom right hand corner
3. Accept the pop-up prompt to leave

Created: 5/1/2020