**WebEx Tips and Quick Reference Guide**

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**Webex - How to create a meeting on behalf of another (delegate permissions)**

This allows one WebEx user to become a delegate for another WebEx user for the purposes of scheduling meetings on one's behalf.

This is a two-step process that involves some action from both users.

* The person being scheduled on behalf of needs to add the scheduler as a delegate
* The person scheduling the meeting can then choose to schedule on behalf of him/her

**Adding a delegate**

Add a delegate to WebEx if you plan on having an assistant or someone else handle the scheduling of your WebEx meetings or Events

|  |  |
| --- | --- |
| http://kb.mit.edu/confluence/images/icons/emoticons/warning.gif | In order for these instructions to work, the delegate must have already logged into WebEx at least once in the past in order to create their account |

1. Login to WebEx at <http://azgov.webex.com>
2. Click on **My WebEx**
3. Click **My Profile** on the left hand side
4. Click on Preferences on the right hand side
5. Select **Scheduling Options** then the link **Select Host**
6. Type the email address of the person of whom you'd like to be able to setup meetings on your behalf into the *search* box and click **Search**
7. Their email address should appear below. Select it and click **Add**, then click **OK**
8. **Important:** Scroll to the bottom of the page and click **Save**
9. Your designate should be all set.

**Creating a meeting on behalf of another person**

|  |  |
| --- | --- |
| http://kb.mit.edu/confluence/images/icons/emoticons/warning.gif | In order to do this, you must already be setup as a delegate for another user. Please see the steps above |

1. Login to WebEx at <http://azgov.webex.com>
2. Click on **Meeting Center**
3. Click on **Schedule a Meeting** on the left-hand menu
4. Click the link for the **Advanced Scheduler**
5. In the dropdown box labeled: **Schedule For:**, choose the person you'd like to schedule a meeting for
6. Proceed with the meeting setup as normal

# **Schedule and start a meeting**

Follow these steps

1. Log in to your WebEx site.
2. Under *Host a Meeting*, click *Schedule a Meeting*.
3. If you see the Advanced Scheduler page, click *Quick Scheduler*.
4. Select a *Meeting Type*, enter a *Meeting Topic*, then enter and confirm the meeting password.
5. Specify the *Date*, *Time* and *Duration*. (Setting duration is for planning only — the meeting will continue until you end it.)
6. Enter the email addresses of people you want to invite.
7. Click the green *Start* button to begin the meeting now or click *Schedule Meeting* if you changed the time or date*.*
8. To start a meeting you scheduled, click *My Meetings*, then locate the meeting and click *Start.*

##### Download and save:

[Getting Started with Meeting Center, PC](https://www.webex.com/content/dam/webex/eopi/Americas/USA/en_us/documents/pdf/pdf-gs-c2n1-mc-getting-started-win.pdf)

**Share content in your meeting**

Deliver, review, and collaborate on presentations, documents, and more.

Follow these steps

1. Click the button at the bottom of the sharing panel on the Quick Start tab.
2. Select what you want to share with everyone in your meeting, such as a whiteboard or file.
3. Use Annotation Tools if you want to highlight or mark on shared content. You can also enable the tools for others. From the *Participant* menu, select *Assign Privileges* and check the box next to Annotate.

##### Download and save:

[Sharing and Presenting Tools](https://www.webex.com/content/dam/webex/eopi/Americas/USA/en_us/documents/pdf/pdf-gs-c2n2-mc-presenting.pdf)

# **Share your video feed**

Make a personal connection through face-to-face interaction.

Follow these steps

1. From the *Meeting* menu, select *Options* to check that video is enabled.
2. Click the video button next to your name in the Participants panel. (If you have an external camera in addition to a built-in one, click the gear icon to select one.)
3. Double-click the speaker's video to display it in full screen.
4. To stop sharing your video feed, click the video button again.

##### Download and save:

[Using Video in Your Meetings](https://www.webex.com/content/dam/webex/eopi/Americas/USA/en_us/documents/pdf/pdf-gs-c2n3-mc-using-video.pdf)

## **Scheduling a WebEx Meeting Using Outlook**

While you are scheduling an on-site meeting from Outlook, you can easily add a WebEx meeting so that attendees who are not on-site can participate online.

**To schedule a WebEx meeting:**

1. Click **Schedule Meeting** in the Outlook Ribbon. A new appointment window opens.

2. Enter the meeting information as you normally would.

3. Click **Add WebEx Meeting,** then select **Add WebEx Meeting**.



The WebEx Settings dialog appears.

 4. Enter a meeting password. (optional as one will be generated)

**Note:** Modify settings as necessary. Refer to the tables following step 6 for explanations of the available features.

5. When you have finished scheduling and modifying settings, click **OK**.

6. Click **Send**. Attendees will receive an email invitation with a link to the meeting, and the meeting will be added to your Outlook calendar and to the scheduled meetings list on your My WebEx page. (refer to page 5 step 4 diagram)

**Changing a Recurring WebEx Meeting**

You can change an occurrence of a recurring meeting from your Outlook calendar to:

* Change the date and time

**Note:** The new date and time must be after the previous meeting in the series, and before the next meeting in the series.

* Invite or remove attendees
* Remove WebEx from a meeting series that includes WebEx.

**Note:** You cannot add WebEx to a meeting in a series that that does not already include WebEx.

 **To change an occurrence of a recurring meeting:**

1. Locate the meeting you want to change on your Outlook calendar.
2. Double-click the meeting occurrence. *The Open Recurring Item dialog is displayed*.
3. Select **Open this occurrence**, then click **OK**.
4. Make your changes, then click **Send Update**. *The meeting occurrence is updated on your Outlook calendar and on your WebEx site. Attendees are notified of the change.*

**Adding a Personal Room Meeting**

If you add a Personal Room meeting, invited attendees can access your personal room by clicking the link in the invitation email, or in the appointment on their Outlook calendar.

 **To add your Personal Room meeting:**

1. Click **Schedule Meeting** in the Outlook Ribbon. *A new appointment window opens.*

2. Enter the meeting information as you normally would.

3. Click **Add WebEx Meeting,** then select **Add Personal Room**.



*The body of the invitation displays a confirmation that the WebEx meeting has been added.*

4. Save the invitation.

*The body of the invitation is updated with instructions for entering your personal room.*



5. Send the invitation.

**Note:** If you have not entered your personal room when attendees arrive, they will wait in the lobby until you enter, or until you admit them if you have locked the room.

 **To start a Personal Room meeting:**

If you have scheduled a Personal Room meeting from Microsoft Outlook:

1. Open the appointment on your Outlook calendar, then click the meeting link. *Your personal room page opens.*
2. Click **Enter Room**.
3. Enter your user name and password if requested. *The Meeting window opens and your meeting starts. Attendees you invited will be able to enter your Personal Room.*

 **To cancel a Personal Room meeting:**

1. Open your Outlook calendar, then double-click the appointment. *The Calendar Entry opens.*
2. Click **Cancel Personal Room**. *The button changes to Add Personal Room.*
3. Click **Send Update**. *Attendees who received an invitation to the meeting will be notified that the Personal Room portion of the meeting has been cancelled.*

**Note:** This cancels only the Personal Room portion of the meeting. It does not delete the meeting from your Outlook calendar.

**Start a Personal Conference or Audio Only Meeting**

Personal Conference meetings and Audio Only meetings do not start automatically at scheduled times. You must start the audio portion of the meeting first and then you can start the online portion.

1. Start the audio portion by calling the number listed in the email invitation. This button is available only if the audio portion of the Personal Conference meeting has already started.
2. Follow the audio prompts and enter the host access code.
3. If you would like to start the online portion of the meeting, select the link provided in the email invitation to view the Personal Conference Meeting Information page or navigate to that page through your WebEx site.