The Trainer's Guide to

Cisco webex

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How to Use This Guide

This guide is designed to provide technical tips & tricks and best practices advice for virtual training conducted via Webex. It is suggested that you use this guide to help enhance your understanding of the Webex platform, gain confidence in your facilitation skills, and improve upon the learner experience.

While the tips & tricks in this guide are invaluable, they will not provide you with a complete training experience. For access to a bank of hundreds of virtual (and in-person) training activities go to www.soapboxify.com. Soapbox is an all-in-one presentation creation tool that allows you to enter some basic information about your training (length, audience, objectives) and in a matter of minutes will provide you with a complete facilitator guide, slide deck, handouts, and activity instructions. Sign up today for a free 10-day trial to experience how Soapbox will revolutionize your training programs.

Basic Feature Overview

Roles

Webex Meetings has three roles that people may assume during a meeting:

- **Host**: The Host is the person who schedules, starts, and ends the session. They also control recordings and can assign roles to other people within the session.
- **Presenter:** A Presenter is given additional privileges such as the ability to share presentations, whiteboards, documents, and applications during a meeting. Multiple people can be assigned a Presenter, and the role can be reclaimed more than once throughout a session.
- **Attendee:** Any person not designated as a Host or Presenter is designated as Attendee.

⚠ Limitations

- The Host role can be reassigned only once within a session.
- Attendees on mobile devices may not be able to act as Presenter.
- The Presenter role cannot be given to an attendee joining via the Webex WebApp.
- Changing the Presenter discontinues any application or desktop share currently in progress. However, documents, presentations, whiteboards, or launched polls will remain visible when the Presenter role is changed.

How to Assign Roles

There are multiple ways by which you can make a person a Presenter or reclaim the role:

- On the Participants panel, select the participant's name and then click the *Make Presenter* button.
- Right-click the person's name on the Participant panel. *Select Change Role To > Presenter*.
- On the Participants panel, click and drag the Presenter ball to the desired participant's name, then click *Yes*.

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- Select a name on the Participant panel, go to the Participant menu. Select *Change Role To > Presenter.*

Panels

Webex categorizes some of their tools (Chat, Polls, Participants, Multimedia Viewer and Notes) in sidebars that they call panels. Default panels are Participants, Chat, and Notes. To access additional panels during your session, you will have to enable them prior to use.

Webcam & Voice

Overview

The most basic features of Webex are the webcam and voice features. Users are prompted to enable their microphones and cameras upon logging into a Webex meeting. With the default settings, every participant has the option to mute/unmute at any time as well as the ability to turn off/on their camera at any time.

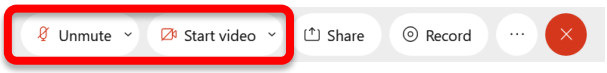
Adult Learning

Adult learners need multi-sensory learning experiences. For virtual instructor led training (VILT) this means asking your Participants to enable their cameras during training sessions. Also, adult learners need to be involved in their learning, which includes planning learning experiences with feedback and interaction, both of which are most effective on camera.

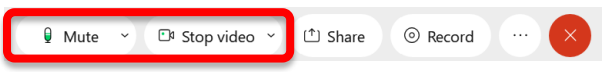
Limitations

When logging onto the meeting, users will be prompted to choose their audio source or enable a webcam. This can at times be challenging for Participants if they are not using microphones/cameras built into their machine.

How to Turn Your Webcam/Voice On and Off



The main toolbar has buttons for both audio and video. When the buttons are red, it means they are not on. Simply click each button to turn on audio/video (webcam).



Audio/Video buttons will have green accents when they are enabled.

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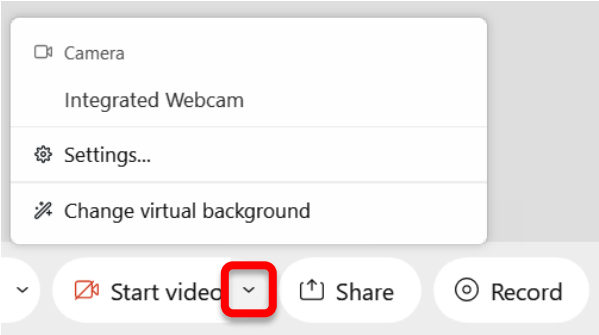
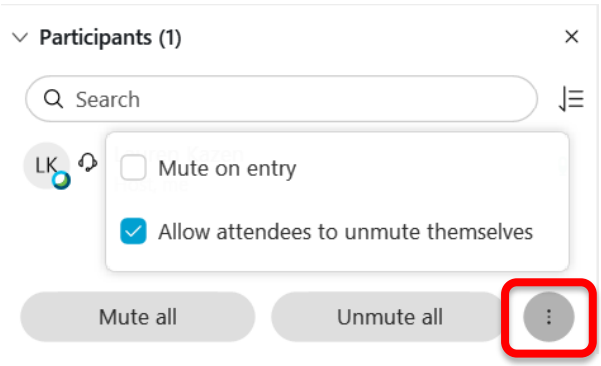


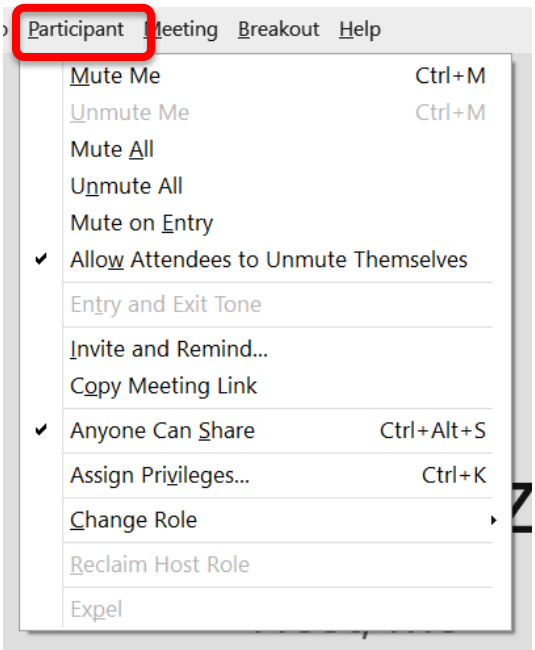
Click the drop-down arrow on each button for additional audio/video settings such as adding a virtual background.

Mute All

The Host can mute all Participants. This is helpful to enable as people are signing into the meeting to hide loud background noises. Furthermore, for meetings with a larger number of Participants (10+), it is best to mute all Participants while the Presenter is speaking so that everyone can hear.



In the Participants panel, the Host will have the ability to *Mute all* and *Unmute all.* By clicking the button for additional options (three vertical dots) the Host will also have the ability to mute Participants upon their entry to the session, and a selection for allowing Participants to unmute themselves (if they are muted by a Host).



Additionally, you can edit mute settings by clicking *Participant* on the toolbar and editing the settings of your choice.

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Best Practices

- **Mute people upon entry.** Change your settings to mute Participants upon entry prior to the start of your session to avoid sudden loud noises or commotion.
- **Ask people to turn on their cameras.** At the start of your session, ask your Participants to turn on their cameras. Provide a brief explanation of why you are asking them to do so.
- **Allow Participants the ability to unmute themselves.** It is easy to get carried away with presenting and forget to unmute Participants at necessary points. It is also an additional factor to try to keep track of during an already busy session. Allowing Participants the ability to unmute themselves will take the burden off a Presenter or Producer.

Back-Up Plan

If the webcam and/or voice are not working, try signing off Webex and back in again. If that does not solve your problem, try a computer restart.

Screen Share

Overview

Screen sharing is another basic Webex feature that is easy to use and can be used in a variety of ways to enhance learning. Screen share can be used to present PowerPoint slides, show a webpage or video, or to show a document.

Adult Learning

Adult learners need learning experiences that appeal to all their senses, including delivery techniques that meet the needs of audio, visual, and independent learning preferences. Using the screen share feature is one important method through which you can engage your learners.

Limitations

Screen sharing may not be available on some Android devices.

How to Enable or Disable

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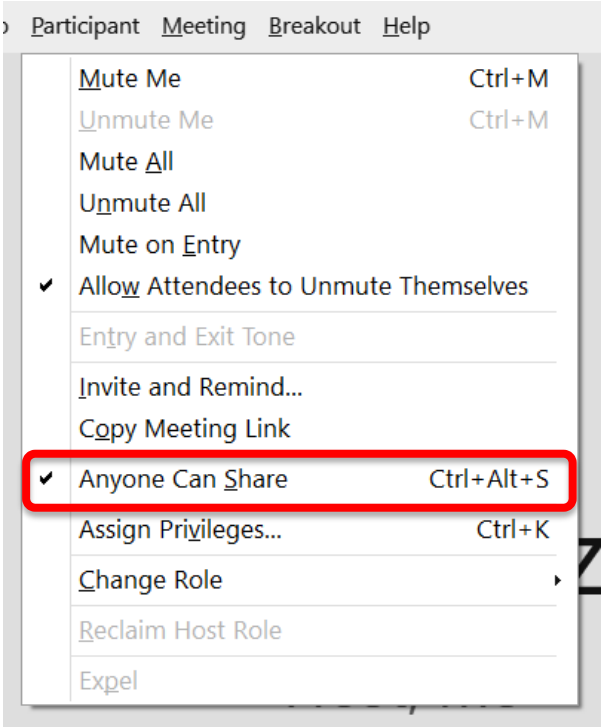
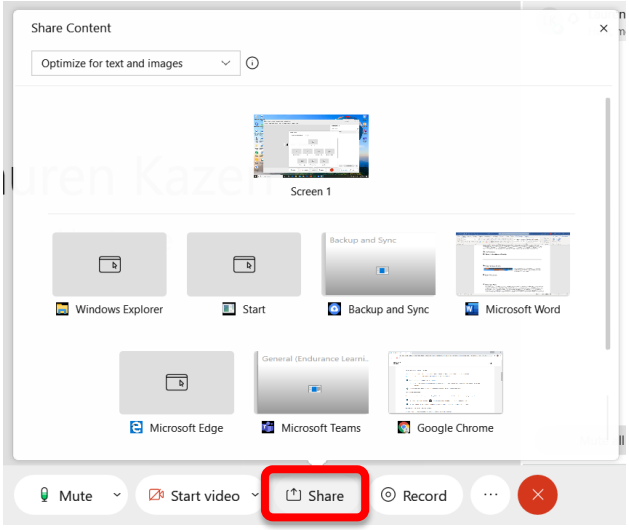


If you would like for all Participants to have the ability to Share. Click *Participant* in the toolbar. Make sure that the settings for *Anyone Can Share* are enabled (checked).

How Screen Share



To share, click the share button on your control panel. You will be given the opportunity to share your screen. Additionally, you can select to share only a single application.

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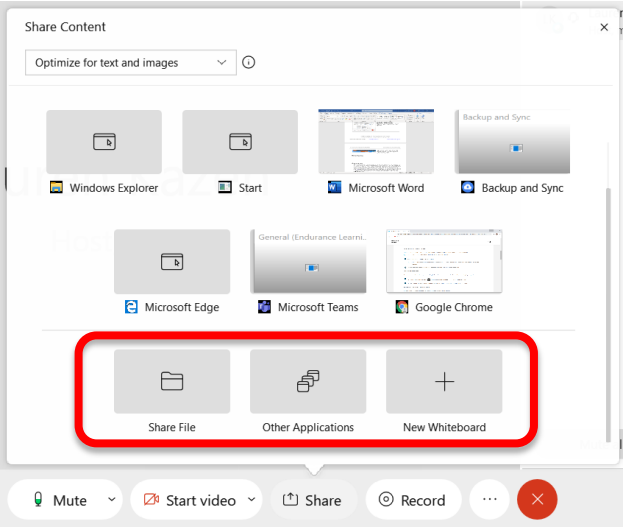
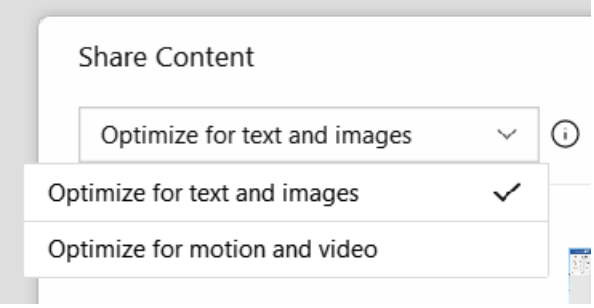
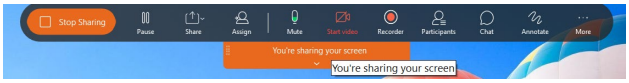


By scrolling down in this window, you will also see that you can use the share button to share a file, or a whiteboard.



Depending on the type of content that you are sharing, you may choose to change the settings in the top left corner to optimize for text and images or for motion and video.



When you enter screen share, you acquire a toolbar with most of your meeting controls at the top of your screen.

Best Practices

- **Share only the application that you want Participants to see.** Webex gives you the ability to pick the application that you want to share when you screen share. Sharing only that application takes away possible distractions such as a desktop background photo, multiple open applications, or producer/facilitator controls.
- **Participants can use screen share in breakout rooms to display conversation questions or to complete a task**. When Participants are in a breakout room, they do not have the ability to see the Host/Presenter screen share. Instead, one of the Participants of a breakout room can share a handout, document, or webpage for their group to be able to discuss during a breakout session. Be sure to clearly explain this to Participants prior to launching them into the breakout session and ensure that they have all the documents necessary to screen share with their group.

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Back-Up Plan

It is a good idea to share all of your materials with your Producer prior to the start of the session so that they can take over screen sharing a PowerPoint or document in the event that you have technical issues in trying to screen share. It is also a good idea to have back-up activities in mind if your planned screen share does not work. For example, if you are planning to show a video but you cannot get the video to play, you could instead tell a story that drives home the same point.

Chat

Overview

Chat is another basic Webex feature that all Participants have access to regardless of their device. Participants can chat with the entire meeting group or to privately chat with individual people within the meeting group.

Adult Learning

Chat is a great tool by which to allow adult learners to participate in their learning experience actively and practically in order to learn by doing. Facilitators can ask questions for Participants to share how they can apply their learning to their lives. Further, the chat feature allows Participants to practice and be involved in the learning experience through feedback and evaluation.

Limitations

If for some reason you do not want Participants to be able to chat, the Host can disable the chat feature. Additionally, the Host can disable the private-chat feature if you do not want Participants to have the ability to private chat people (instead they would only be allowed to chat people within the main meeting group chat). Keep in mind that it is helpful for Participants to be able to privately chat message the Producer with any technical issues, so it may be useful to keep this feature enabled with most audiences.

How to Enable or Disable

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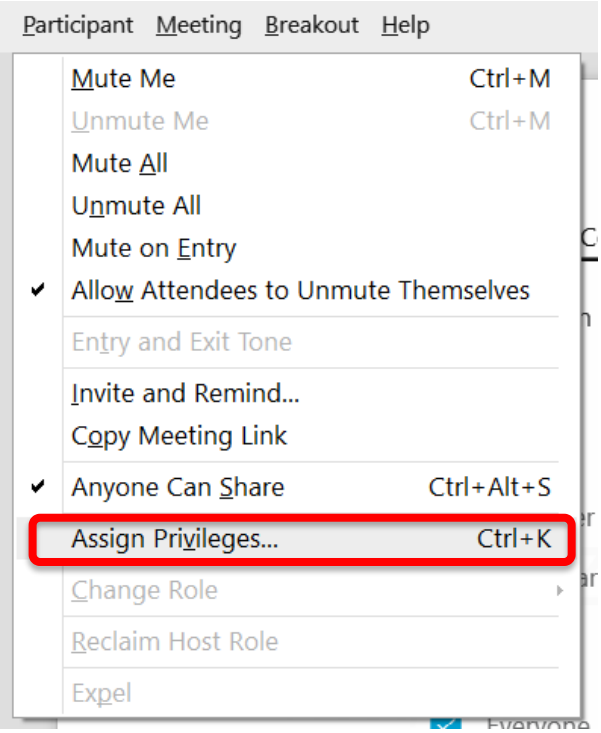
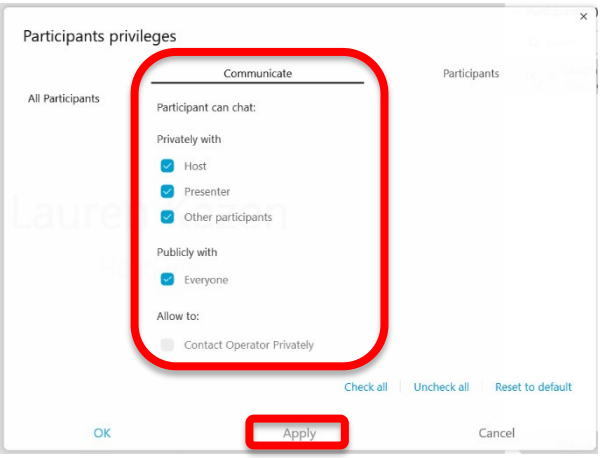


From the top menu bar, select *Participant.* Then select *Assign Privileges*.

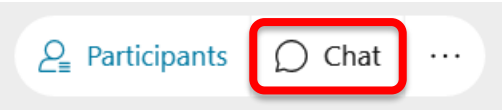


Here you can select if you would like Participants to have the ability to private chat with other Participants, the Host, or the Presenter.

Additionally, you could decide to enable or disable the ability to publicly chat with everyone in the meeting.

Be sure to click *Apply* at the bottom if you modify these settings.

How to Chat



Access the Chat panel by clicking the *Chat* button (speech bubble) in the bottom right corner of your screen.

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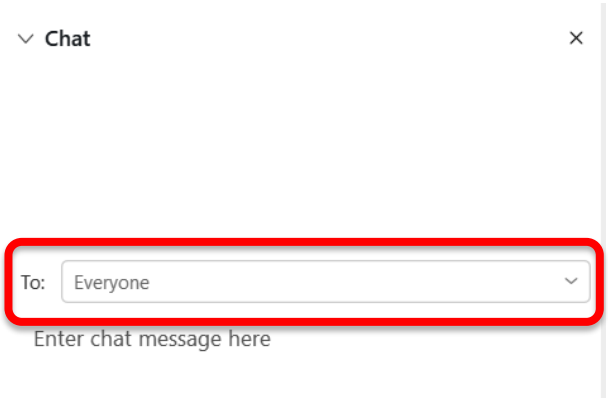

Users can decide if they would like to chat Everyone in the meeting, or privately chat with a certain person. **Note:** These options for users will vary if the Host has disabled the use of certain chat functionality.

Best Practices

- **Explain to Participants the difference between group chat and private chat.** If you have both features enabled, be sure to explain to Participants that there is a difference between the group chat section and the private chat section. Nothing is quite as awkward as a message going out to the group that was meant to be private.
- **Tell people to private chat the Producer with technical questions.** Technical difficulties can really cloud up the group chat window and take away from the purpose of your session. At the start of your session, tell Participants to private chat the Producer with any technical problems they may encounter during the session.
- **Have your Producer manage the chat room.** It is best practice to have your Producer manage your chat room instead of having the Presenter attempt to do so. When asking a question to the group, tell Participants that you would like them to respond in the chat window. After a few moments, ask your Producer to share aloud some of the things that Participants shared within the chat window. This gives the Producer the ability to read responses while the Presenter is talking. The Producer can then filter out responses that should be shared aloud to the group. This is especially important with large groups when the number of responses coming into the chat window will be numerous.
- **Participants can use the chat feature in breakout rooms.** During breakout sessions, Participants can chat with the people within their breakout room, though there is not a way to save these chat logs.

Back-Up Plan

If chat isn't working for some reason or you are feeling overwhelmed by the amount of talk in the chat window, you can always unmute some or all Participants and ask people to verbal respond to questions or to elaborate on something that they shared in the chat window.

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Breakout Rooms

⁘ *Overview*

Breakout rooms are a way to have small group conversations or work time in a virtual environment. Like Participants in a training room working together at a table, breakout rooms allow for the Presenter to put Participants into individual meeting rooms with partners or small groups for as much time as they would like. At the conclusion of the breakout room session, the Presenter or producer can bring groups back together as a large group with the click of a button.

💡 Adult Learning

Breakout sessions allow adult learners the opportunity to practice what they have learned (and get feedback) and to share the relevance and applications of their learning by having small group conversations.

⚠ Limitations

- ⚠ **Breakout rooms need to be enabled.** Breakout rooms are not automatically enabled at the start of a session (even if you have enabled them previously in a different session). Each time you start a session you will need to re-enable breakout rooms to utilize them.
- ⚠ **The maximum number of breakout sessions in a meeting is 100.** The number of Participants in each session is limited by the meeting capacity of your plan. For example, if your plan allows for 1,000 people, you can have 100 sessions with 10 people in each or 20 sessions with 50 people in each.
- ⚠ **Remind Participants to unmute themselves.** If the sessions are not ended and the Host asks Participants to return to the main meeting, the attendees' audio will be automatically muted upon their return. The Host will need to remind Participants to unmute themselves if they want to speak in the meeting.
- ⚠ **Participants on certain devices may be unable to join breakout rooms.** Webex meetings Virtual Desktop software does not support breakout sessions. Additionally, breakout sessions cannot be joined from a video device, Cisco Webex Teams, or by Participants on mobile devices. iPad users will experience some limitations (such as not being able to ask to return to the meeting) but will be able to use the breakout room feature.
- ⚠ **Only one Host or Presenter can have the breakout session assignment dialog open at a time.** Decide prior to the session which person will be managing breakout rooms. **Note**: It is best practice to have a Producer managing breakout rooms.
- ⚠ **The features available in breakout sessions are more limited than the main room.** During breakout sessions, Participants will be unable to raise their hand, take notes (using the note taker tool), access closed captioning, record breakout sessions, optimize their content sharing (for motion and video), share a web browser, share multimedia, use the annotation or whiteboard features, live stream, use polls, or save their chat record. **Note**: Users who join from the Webex meeting app will be unable to share content in breakout rooms.

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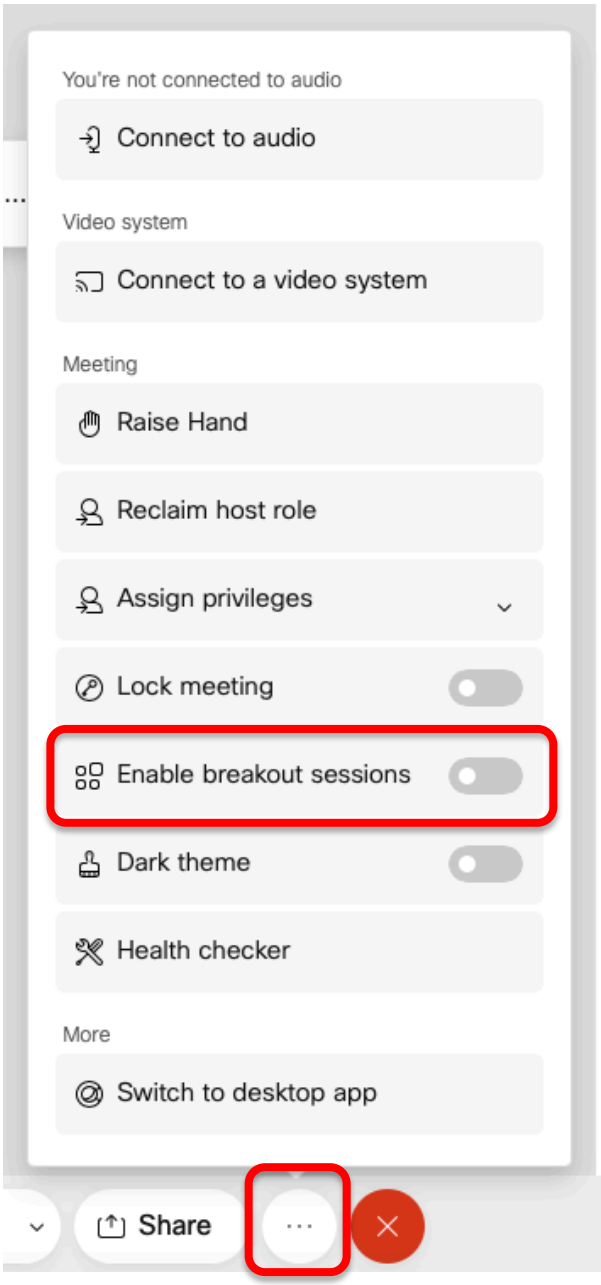
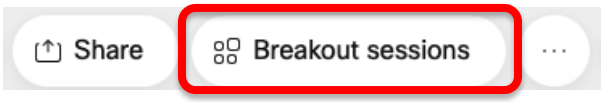
How to Enable



From the bottom menu bar, click the button for *Additional Options* (3 vertical dots). *Enable breakout sessions.*



Enabling breakout sessions will add a breakout sessions button to your bottom menu bar.

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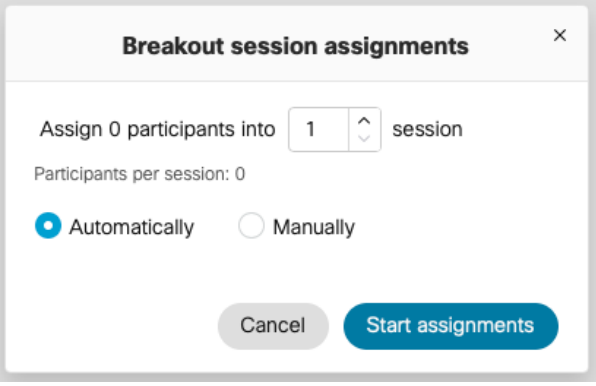
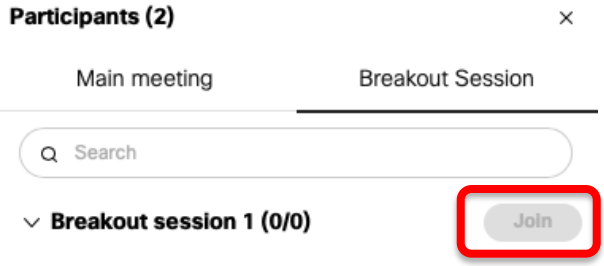
How to Set-Up



Click the *Breakout Sessions* button on the bottom menu bar to access breakout session assignments, where you can choose how many sessions you would like to create, and decide to sort Participants automatically (random) or manually.



In the Participants Toolbar, you will have the option to *Join* a breakout session in progress.

Best Practices

- **Prepare Participants for what is about to happen.** For Participants who have not used breakout sessions before, the unknown can be a little scary. It is important to explain what is about to happen and to give clear directions for what they should be accomplishing within their breakout room.
- **Unmute Participants.** Oftentimes Participants will not know how to unmute themselves or will struggle to do so. One way to alleviate this potential hazard is to unmute all Participants before you launch them into their rooms
- **Give Participants all the materials that they will need.** The Presenter screen share is not visible while Participants are in a breakout room. If you have directions for group time or questions that you would like Participants to discuss while in their breakout sessions, you will need to share handouts ahead of time. A second option would be to join each breakout room and share a handout link in the group chat. **Note:** the breakout room chat log is separate from the main room's chat log.
- **Broadcast Messages.** Use the *Broadcast Message* feature to send notes or reminders to Participants while in breakout rooms. Select *Breakout Menu*, *Broadcast Message*. You can select who you would like to send the message to. Write your message, then click *OK* to send. This message will appear on the selected participants' desktop during their session.

Back-Up Plan

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Occasionally you will find that Participants may be unable to join a breakout room due to technical problems or their device choice. If, after troubleshooting with the participant, you are unable to help them to get into a breakout room, you may use the main room as a mini "breakout room" for any Participants who were unable to access their breakout room.

Polls

Overview

Webex polls can be used for gathering feedback, assessing knowledge, or taking a vote. Webex polls can be comprised of one single poll question, or multiple poll questions launched together as a multiple question assessment.

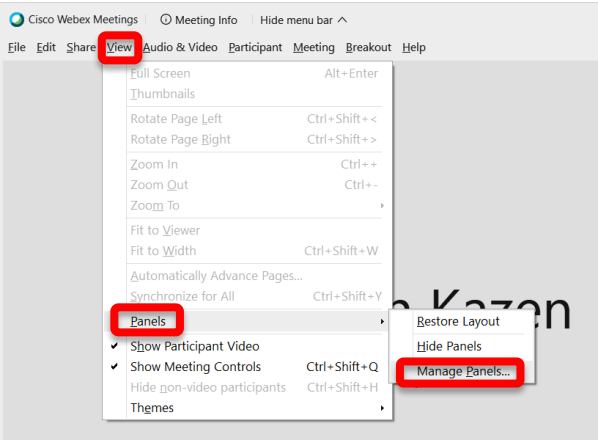
Adult Learning

Polls are invaluable to training sessions as they are a great method by which to gather learner feedback. Participants can be involved in the learning process and to provide feedback and consultation. Polls are also a way by which to give Participants control over their learning, to gather evaluations, to check for understanding, or to allow Participants to make decisions.

Limitations

Polls need to be enabled each meeting if you would like to utilize them during your session (it is not available by default even if you have turned it on previously).

How to Enable



From the top menu bar, select *View*, *Panels*, *Manage Panels*.

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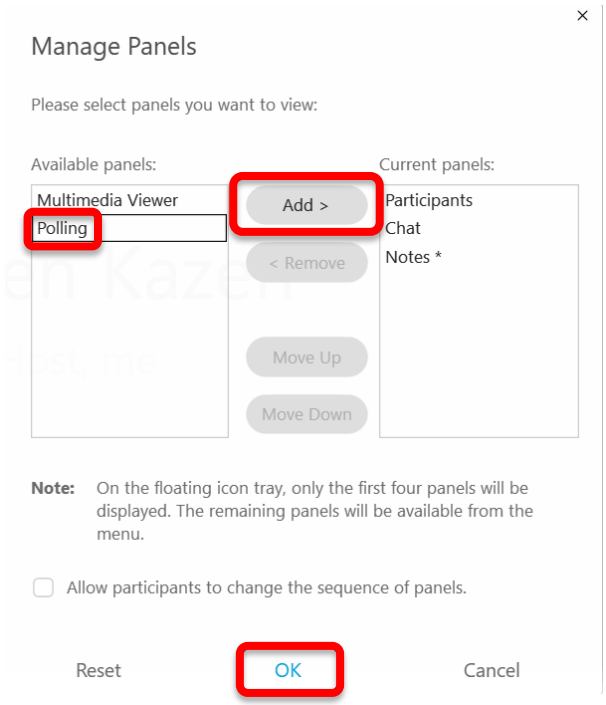
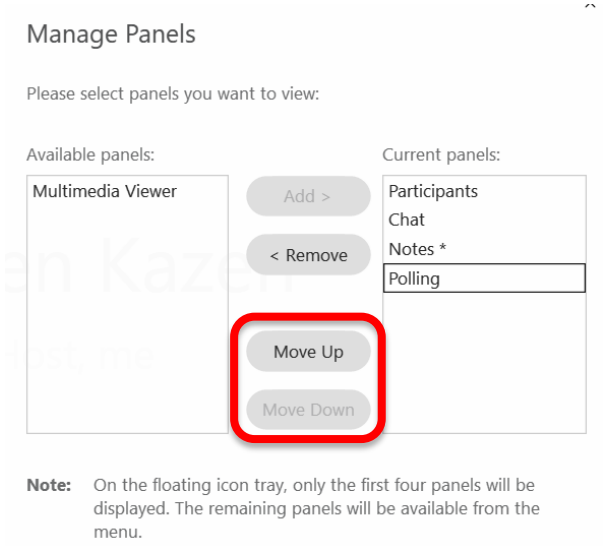


Select Polling from *Available panels*, Click *Add* >. Polling will be added to the *Current panels* section. Click *OK*.



In the *Current panels* section, you can select a panel and click the buttons to move it up or move it down to re-arrange the order. The order that you arrange panels into here will affect how they are displayed on your main screen.

Because I arranged Participants and Chat first, their icons show on my main screen.

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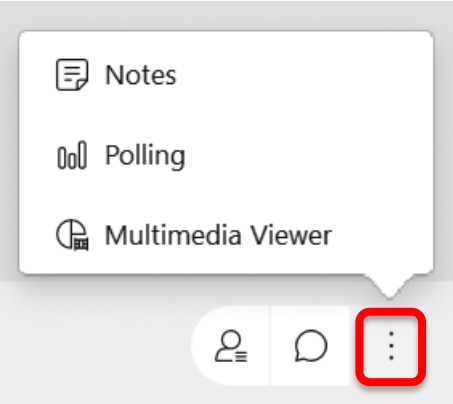
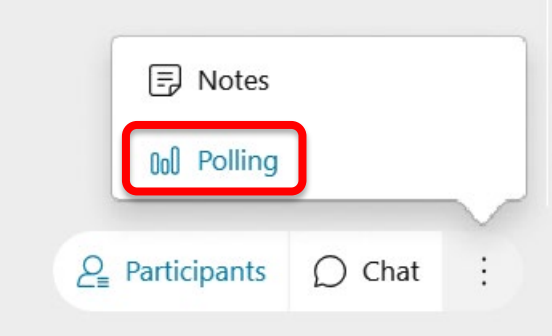


To access the other enabled panels, simply click the three vertical dots to see all enabled panels. **Note:** Only panels moved to *Current* will be accessible here.

How to Set Up



Click the Polling button in the bottom right corner of your main screen. Depending on how you have arranged your panels, you may find the polling panel by clicking on the three vertical dots.

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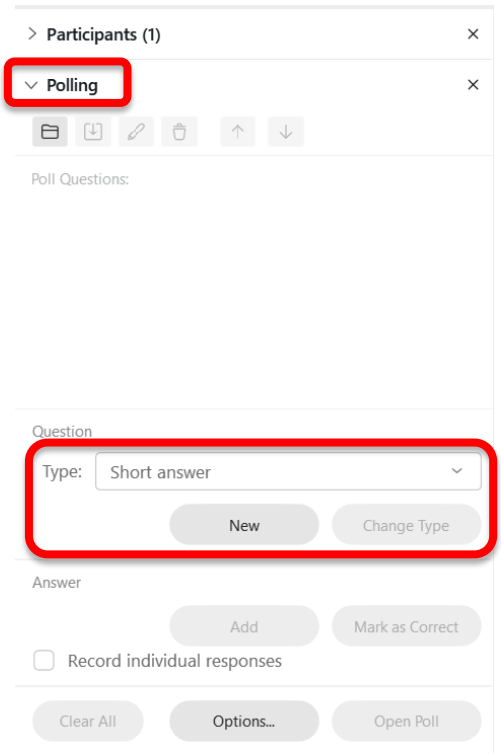
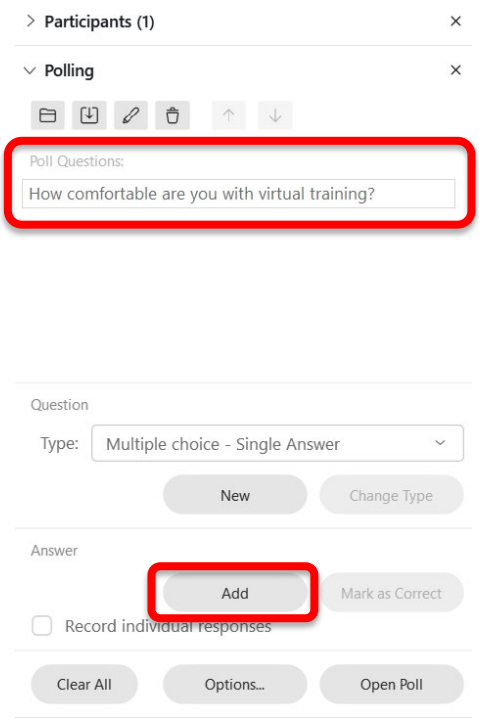


Open the *Polling* panel. Select the type of question that you would like to add to the poll:

- Short answer
- Multiple choice – multiple answers
- Multiple choice – single answer

Click *New* to add the question to your poll.



Enter your question and press enter. Under Answer click *Add* to add an answer to your multiple-choice questionnaire.

Note: Mac users will have buttons that look slightly different.

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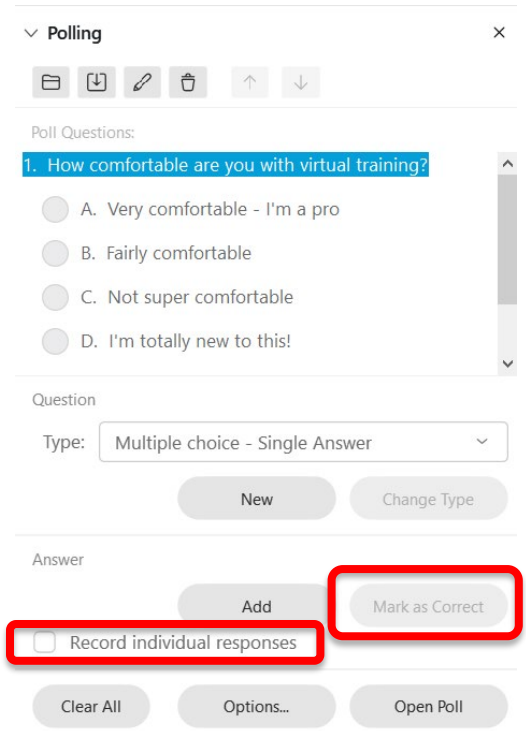
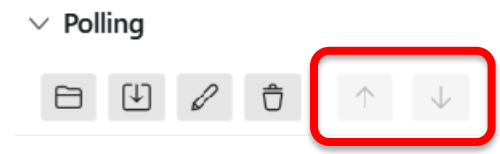
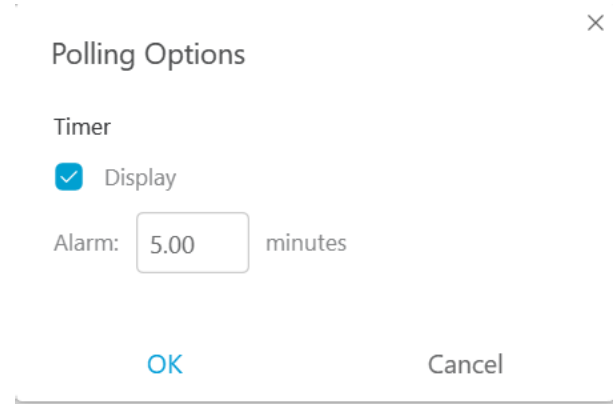


Add your answers. If your question has one or more correct answers, select them to *Mark them as Correct*.

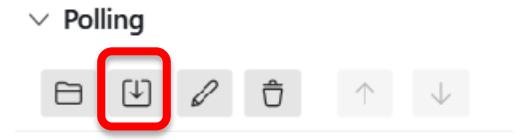
If you would like to record individual responses to the poll questions, click the box to do so. You will only see this name/answer association if you choose to save the poll to your computer after the poll concludes. You cannot see how each individual respond to questions during the poll.



Add as many questions as you would like to the poll. Use the arrow buttons at the top to move questions up or down in your poll to suit your needs.



If you would like to set a timer for your poll, Click *Options* at the bottom of the polling panel. If you choose to set a timer, your poll will automatically close after the time is up.



Once you have finished adding your poll questions, click the button to *Save* your poll.

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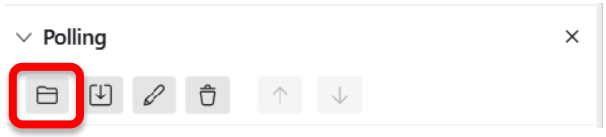
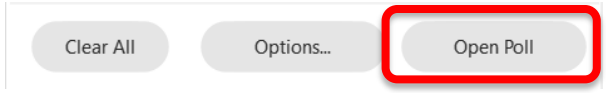
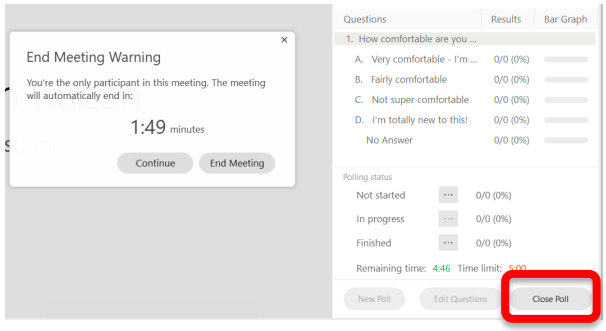


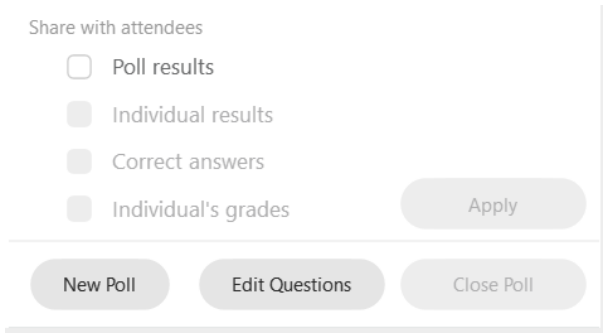
During your session, click the *Open* button to retrieve the poll you would like to launch.



Select *Open Poll.*



You will see your countdown timer begin (if you set one). You can also see how Participants are answering the questions in real time. Additionally, you will be able to see what percentage of Participants have not started the poll, are in progress, or have completed the poll. At any time, you may click the button in the bottom right corner to *Close Poll*. **Note:** If you set a timer, your poll will automatically close when the time is up.



Once you close the poll, you will have the opportunity to share the results with Participants if you would like. You can decide to share poll results (in percentages and bar graph form anonymously), share results with an individual attendee, display the correct answers for all Participants, or share grades with everyone.

You will be asked if you would like to save the poll results to your computer before you close out.

Best Practices

- **Set up your polls in advance.** You will need to save them and pull them up individually during your session.
- **Practice launching polls prior to the start of your session.** It is important to set up all your polls prior to the start of your session and to log in and practice launching your polls. Make sure that you have someone else logged in to validate that they are seeing the poll that you have launched to Participants.
- **Save your poll results at the conclusion of your session.** If you used the polling feature as an assessment, you may want to save the results of one or more of your polls.

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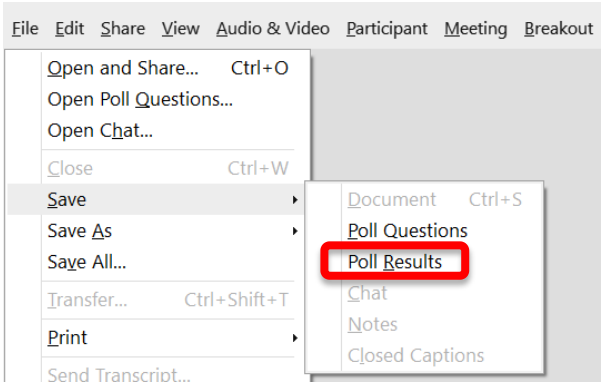
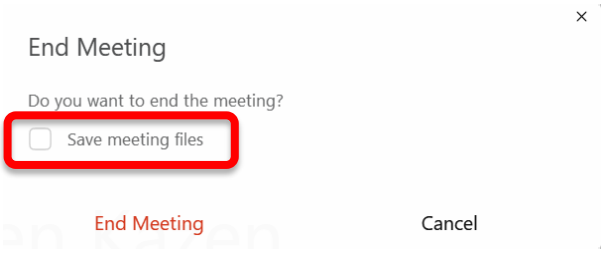
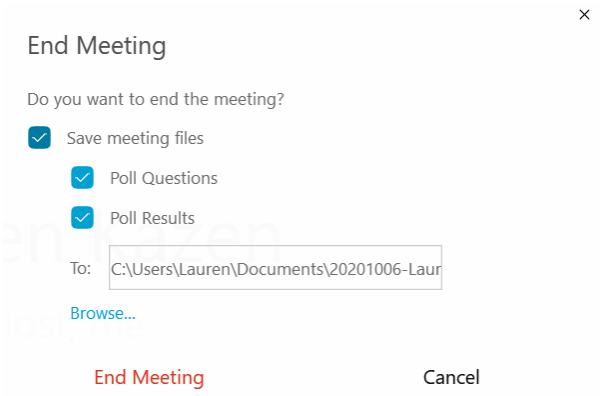
How to Save Poll Results



Caution! This is easy to forget to do before you leave your session. Click *File*, *Save*, *Poll Results.*



Additionally, when you go to end your session, a box will pop up and ask you if you would like to save your event files.



You will be able to save the Poll Questions or Poll Results to your computer if you would like.

Back-Up Plan

If your polls do not launch as planned, you should be prepared to ask Participants to respond to your question aloud (using voice) or via the chat feature. If you are planning to use the poll feature as an assessment you can ask Participants to chat their responses to you using the private chat feature (so that other Participants cannot see their responses).

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Feedback Indicators

Overview

Feedback indicators on Webex vary in function and capability depending on the device that the participant is using. You will find that most Participants will be able to use some form of a feedback indicator: a hand raise, or an emoji.

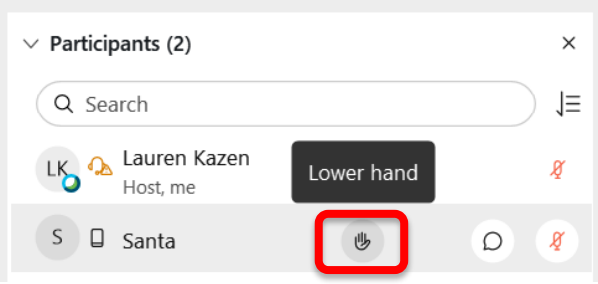
Adult Learning

Effective adult learning programs allow for participant feedback and consultation. Feedback indicators are a simple way for Participants to be involved in their learning process.

Limitations

- **Mobile users and Mac users will only be able to raise their hand.** Users on mobile and Mac will can only raise their hand (not give or view reactions).
- **PC users will only be able to give "reactions".** PC users will have the ability to give "reactions" and to also raise their hands. Additionally, they will be able to see the reactions of other PC users.
- **For all users, hand raises are viewable in the Participants panel.** The Host will have the ability to raise or lower the hand raises viewable in the Participants panel by clicking on them.

How to Use



All users will see the hand raise feature in their *Participants Panel*. You can click next to your name to raise or lower your own hand. Additionally, Hosts will be able to lower the hand of Participants in this panel.

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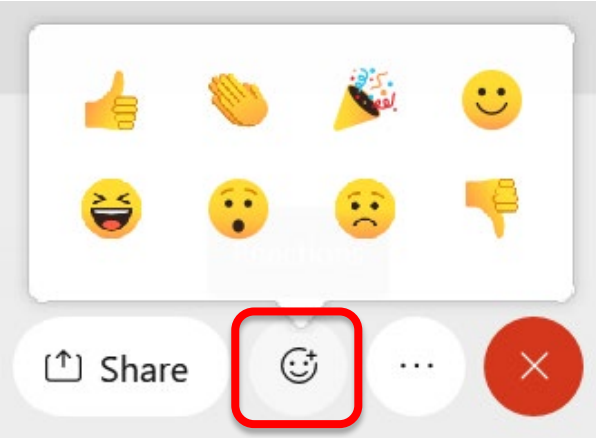

PC users will have a *Reactions* button visible in their bottom toolbar. This enables them to share one of the 8 provided emojis with other PC Participants.

Best Practices

- **The Host can clear responses at any time.** If responses become overwhelming or you would like a clean slate to ask a new question, the Host can clear Participant responses at any time in the Participant panel.
- **Feedback indicators can work like a poll.** If you would like to ask a yes or no question to Participants, feedback indicators are a great way to go. They are also helpful to gauge understanding at any point during your session by asking Participants to indicate if they understand the content or directions using their feedback indicators.
- **Tell Participants about indicators at the start of your session.** If you point out the feedback indicators at the start of your session, it can be a great tool for people who have questions to use to raise their hand as a signal.
- **They may become distracting.** It can be distracting to learning to have thumbs up signs or laughing emojis appearing every few moments. Talk with your Producer about how you would like feedback indicators to be managed. If they are becoming overwhelming, it may be necessary to talk to your Participants about only using feedback indicators when asked.

Back-Up Plan

If the feedback indicators are not working for someone or if you forget to enable them prior to the start of your session, an easy back-up plan is to have Participants chat share their answer. If your group size is small, you may also allow Participants to share answers to a simple question verbally.

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Annotation/White Board Tool

Overview

You can use annotation tools on a shared screen or whiteboard. Using the annotation tool, Hosts, Presenters, and Participants (if enabled) will have the option to write free hand, type on screen using a text feature, draw lines and shapes, and can erase their own annotations. Additionally, annotations may be saved for future reference.

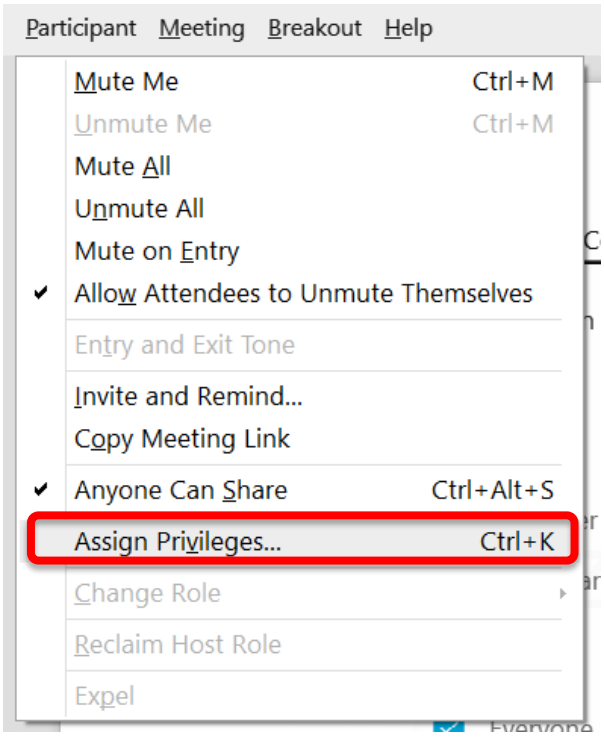
Adult Learning

Annotation tools allow adult learners the opportunity to learn by doing and draw upon their past experiences to aid in their learning. It is also a great method by which to involve Participants and give them the ability to practice something new.

Limitations

- **You may need to enable privileges.** The Host can annotate by default. However, if you would like Participants to be able to annotate, you will need to enable that function.
- **Some users may not be able to annotate.** Participants on certain mobile devices or those joining via the Webex Meetings web app will not be able to use annotation features. For Android users, your version must be Lollipop (5.0) OS or later to participate in annotating.

How to Enable



From the top menu bar, select *Participant.* Then select *Assign Privileges*.

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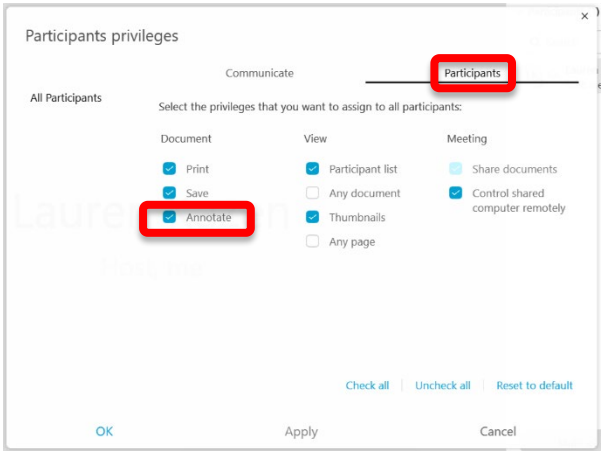
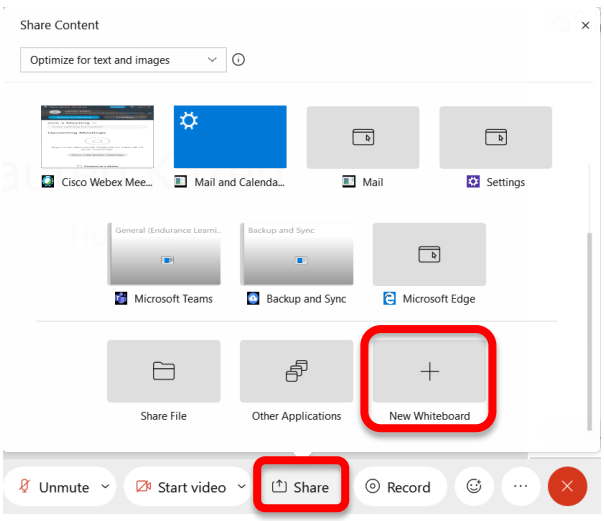


Select *Participants*. Under Document, check the box for *Annotate*.

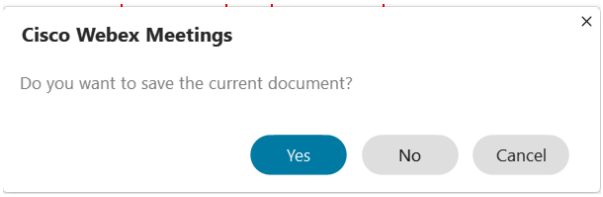
Look over your other settings here to make sure that they are correct before clicking *Apply* at the bottom.

How to Use

To annotate on a shared screen
Share your screen. Then click *Annotate*. If you would like other Participants to be able to annotate on your screen, click *More*, then *Let Anyone Annotate*.



To annotate on an empty whiteboard
Click *Share* on the bottom menu. Scroll down to the bottom of your options and click *New Whiteboard*.



To stop annotating, click *End*. You will be prompted to choose if you would like to save your annotation.

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Features

- **Arrow Pointer.** The arrow pointer can be used by the Host or Participants to point things out or identify something on the screen.
- **Text.** Participants or Hosts can add text to the screen to brainstorm, answer questions, vote, etc.
- **Pen.** The pen tool can be used to write freehand, point something out, draw a graph, etc.
- **Line/Shape**. The line and shape tools can be used to identify or draw something.
- **Colors**. Participants may use different colors to differentiate their annotations.
- **Erase.** Each participant can erase any annotation that they add to the screen or whiteboard. The host/co-host can clear all drawings from the screen or whiteboard.

Best Practices

- **Clear all.** The Host should be aware of the *Clear All Annotations* option (located by clicking the *Eraser*, then *Clear All Annotations*) be prepared to clear the screen for any session where you are allowing Participants to use the annotation tools. This will enable the Host to clear all drawings that accidentally get added to the screen at the wrong time (which can be a big distractor to participants).
- **Know your audience.** It is important to consider your audience when deciding if you are going to enable annotation tools for your session. Participants can accidentally add annotations to the screen at the wrong time, type inappropriate things, or draw pictures that you do not want on your screen.
- **Save your annotations.** It is good practice to save annotations so that you may reference them later in your presentation or after the session has concluded.

Back-Up Plan

If annotations are not working for someone or you forget to enable annotations prior to your session, you can always ask Participants to use the chat feature as a means by which to collaborate during the activity.

Handouts

Handouts are a useful addition to any session. Prior to a VILT session you need to consider how you will be sharing handouts.

Sharing Before the Session via Email

There are a few possible downsides to this method:

- Participants might not attend your session if they receive the handouts in advance.

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- Participants could not receive the email or not get it prior to the session, causing a struggle during the session to get everyone on the same page.

Sharing During the Session via Chat

Share via File transfer
You may share a file to be downloaded by Participants via this method. You may only file share files that reside on your computer (not a server). In the session window, click *File*, then *Transfer.* There are a few possible downsides to this method:

- Some devices will not allow you to send or download a document. If you are using this method, it is best to provide a link to the handout in addition to the file transfer.
- Participants do not have access after the session to the file transfer. If they forget to open it during the session, they could miss the opportunity to receive the handout.
- Handouts can get lost in a busy session or not seen by some Participants.
- Technical difficulties can cause people to not be able to open handout links.

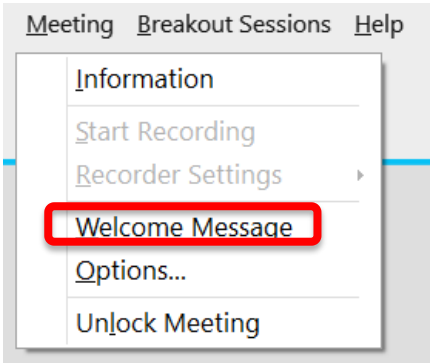
Sharing After the Session via Email

You may decide to share your handouts for the first time after the session OR to combine sending handouts after the session with one of the options listed above. It is a good idea to combine a session evaluation in your post-session handouts email.

Taking Attendance

To view attendance, login to the web version of Webex. Click your name in the upper right corner, then *My Reports*. Click *Usage Report*, then select the date range for the session that you are looking to view attendance. To view attendance, you will need to wait until the report is a Final Usage Summary Report (not Preliminary). Click the session topic to review names of Participants, duration in the meeting, and other pertinent information. This report is available for printing or exporting.

Other Notable Webex Features



Set a Welcome Message.
Click the *Meeting* button in the top tool bar. Then select *Welcome Message* to enter a message that you would like Participants to view when they enter your meeting.

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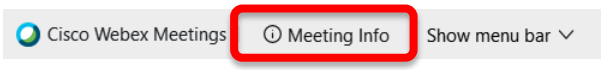
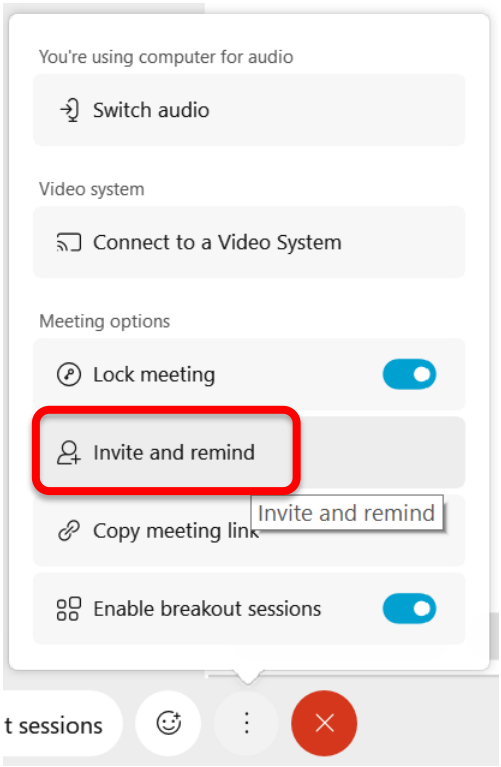
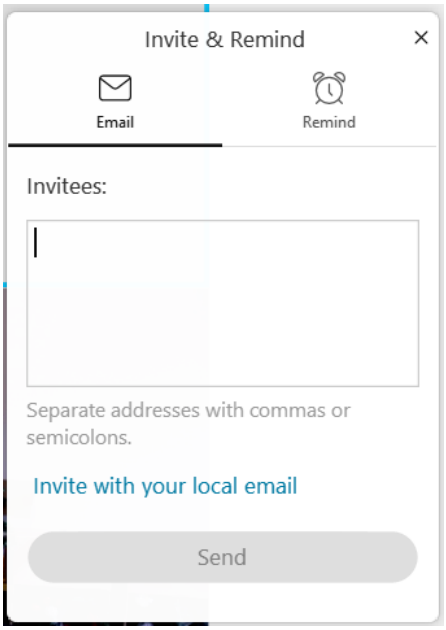


Invite people to your meeting.
Click *Meeting Info* in the top menu bar to access a link to your meeting. You can share the link in email or chat yourself.



You can also invite people or remind people about your meeting by clicking the *Invite and Remind* button, accessible by clicking the 3 vertical dots.

Note: You may click *Copy Meeting Link* below the Invite and Remind button to quickly copy and paste the link yourself.



Using this method, you can easily email a meeting link or reminder.

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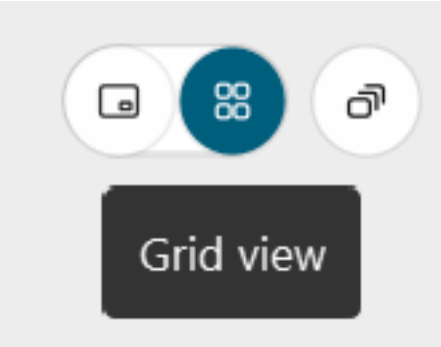
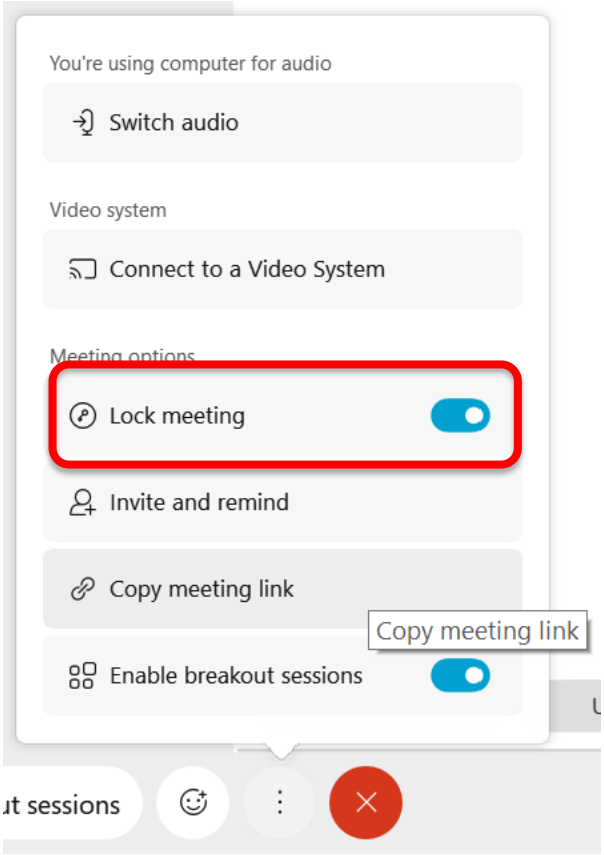
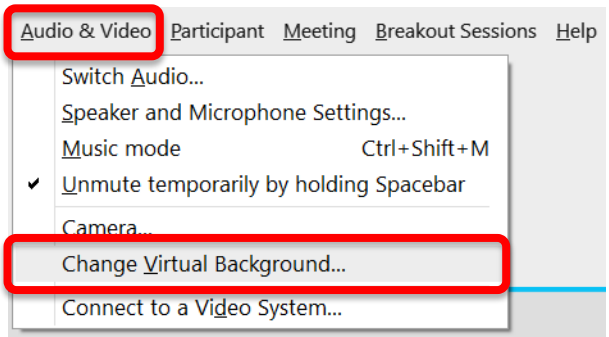


Manage your view
Each person often has their own preferences for viewing slides and the webcams of other Participants. To manage your view, use the buttons in the top right corner of your screen. You have the choice between Active Speaker Video View, Grid View, or Floating Panel View.



Lock your meeting
For security reasons, you may wish to lock your meeting once all Participants have joined. Note: If you lock a meeting and someone drops out, they will be unable to re-join the meeting while the meeting is "locked". Additionally, locking a meeting may prohibit late-arrivals from being able to join your meeting.



Change your background
Hosts and Participants often enjoy changing their background. To do so, click Audio & Video in the top toolbar. Then select Change Virtual Background.

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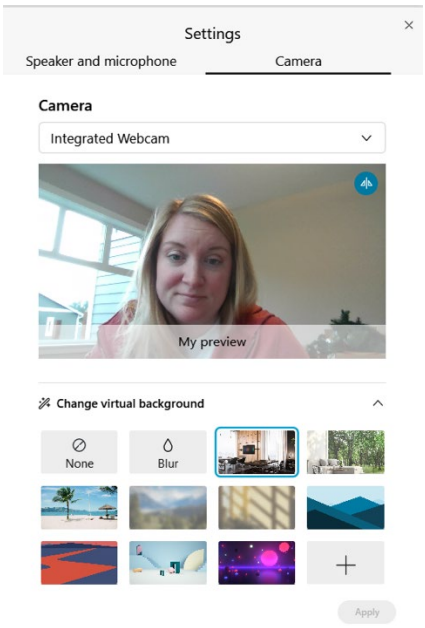
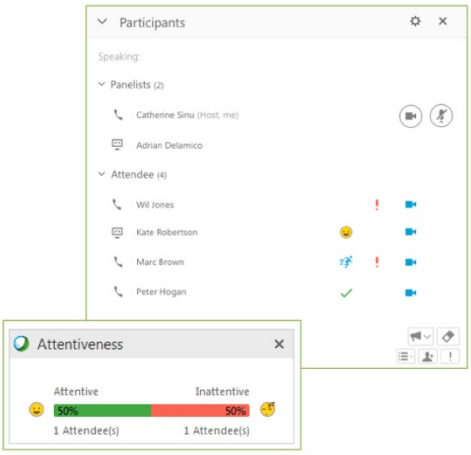


In *Change Virtual Background* settings, you will be able to download a virtual background to use it in conjunction with your webcam.



Track Participant Attention
During your event you can see if Participants are not focused on your Presentation by looking at the attention indicators. Attention indicators show if a Participant has minimized the window or pulled up another window in front of the Webex window.

To enable attention tracking:
Windows: click *Events, Options*, and then from the *Communications* tab select *Attention tracking.*
Mac: click *Webex Events*, *Preferences*, *Tools*, and then *Attention tracking.*

Note: If you do not have this option, you will need to contact your site administrator to enable attention tracking.

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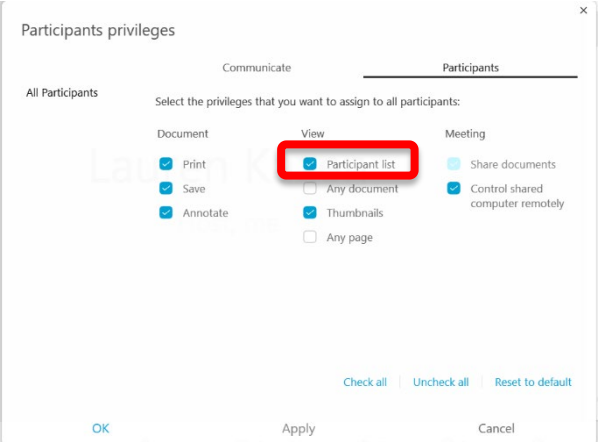

Hide Participants
If you would like to hide the Participants in a meeting so that they cannot see each other you can hide the Participant list by clicking *Participant*, then *Assign Privileges*. Click the *Participant* tab. By default, the *View Participant List* is assigned (checked) to all Participants. Uncheck it to remove the privilege. This will remove the Participant panel.

Note: If you wish to hide Participants, you will need to do so before the meeting begins so that they do not see one another join the meeting.

Producer Role

Overview

The Producer is the unseen Presenter. Their job is to take care of the administrative and technical aspects of the session to free up the Presenter to focus on content delivery. It is important to select your Producer carefully. A successful Producer is one who knows the platform well, who has the technical expertise to be able to help Participants who are having problems, and someone who can jump into the role of Presenter in the event of a technical problem.

Limitations

Due to the structure of Webex, the Producer should be the person operating with Host controls as there can be only one host at a time (and the Presenter should have Presenter controls). This will allow the Producer to launch polls, manage breakout rooms, and control other operational aspects of the session.

- **There can be only one Host at a time.** While the role of Host may be passed within a session, there can be only one Host at a time. It is advisable to make the Producer Host prior to the start of the session.
- **The Host must be an authorized user.** To be Producer using the Host roll, you need to have a user account. **Note:** A person in the Presenter role does not need to have a user account.
- **Use the correct device.** For best results, Hosts and Presenters should always conduct their sessions from a desktop PC or Mac computer. The presenter role cannot be given to an attendee who is participating via the Webex Web app. Additionally, some mobile users may not

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be able to be assigned the role of Presenter or utilize all of the functionality of the Webex meeting.

- **Decide who will manage polls**. If the Presenter would like the ability to manage polls, the Host (Producer) will need to allow the Presenter to be Poll Coordinator.

Job Responsibilities

- **Admit people.** If you selected to enable the lobby (waiting room) when you created your session, you will need to admit people to the room once you are ready to begin your session. Webex will prompt you to admit all Participants (or select participants) who are in the lobby.
- **Launch polls.** If you are using polls in your session, you will need to launch polls at the appropriate time. You will need to assign yourself the role of Poll Coordinator in order to manage polls.
- **Answer chat questions.** It is important to keep an eye on the chat box during the session and to respond to questions or help requests, as necessary.
- **Launch breakout rooms.** If you are using breakout rooms during your session, it will be the role of the Producer to set up and launch breakout rooms. You will need to select if you would like to sort Participants manually or automatically, launch rooms, and call Participants back from their rooms.
- **Be ready to assist users with breakout rooms.** Be prepared to enter breakout rooms to assist people, as necessary.
- **Record your session**. If you would like to have your session recorded, it should be the responsibility of the Producer to make sure they enable the recording feature at the start of the session.
- **Assign roles**. If you would like participants to have Presenter privileges at any point during the session, or if you would like to assign annotation privileges to a Participant, it should be the job of the Producer to do so.

Best Practices

- **Practice.** The most important thing for a successful session is for the Presenter and Producer to practice together. Ensure that all features are enabled and set up and run through the entire presentation together to ensure that each person knows their responsibilities during the session.
- **Be on hand as a back-up Presenter.** In the event that your Presenter has an unstable internet connection or has a computer crash, it is important to have the slides and lesson plan pulled up on your own computer and ready in the event that the Producer needs to jump in as the Presenter. Make sure that you understand the learning objectives and activities to continue the session if your Presenter experiences technical difficulties.
- **Be on camera**. Best practice is that the both the Presenter and Producer will be visible on camera.
- **Introduce the Producer and explain their role at the start of session.** It is important that Participants are introduced to the Producer at the start of the session and told that they should reach out to the Producer if they need help at any point during the session.
- **Tell Participants how to contact the Producer if they need help.** The best way for Participants to reach out to the Producer with technical problems is through a private chat message.

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- **Check-in with your Producer periodically during your session.** It is easy to get into the flow of presenting and forget to check-in to make sure that everything is going alright. Make a point to check in with your Producer periodically throughout your session. You may choose to do this verbally or through a private chat message. The Producer should use these check-ins as an opportunity to advise the Presenter of questions that Participants have asked (in the chat window) or to remind the Presenter of time constraints.

Structure

Pre-Session Activities

People will always arrive at the session early. It is a good idea to have something for Participants to do when they arrive at your session. This gives Participants the opportunity to get comfortable with the tool and can also be a means by which to share content. Possible activities may be playing a trivia slide deck or doing a pre-session activity such as answering questions or playing a game.

Starting Your Session

- **Begin with "housekeeping" items** to set expectations and help Participants get comfortable with the tools being used. You can use icebreaker or anchor activities as a means by which to teach Participants how to use a tool to accomplish this seamlessly.
- **Include breaks, as necessary.** If your session is to exceed one hour, you may need to consider adding a break. Add breaks to VILT sessions as often as you would to an in-person training session. You may consider planning for "working breaks" prior to a breakout session or activity using the annotation tools. Ask Participants to prepare for the activity prior to taking their break. This will provide for an opportunity for people who need more assistance to get it while not holding up the session.

Post Webinar

It is best practice to send out an evaluation after your session. This is also a good opportunity to send out handouts or resources that were shared during your session.

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Practice

Pre-Session Checklist

Prior to starting your practice session:	
▢	Send your meeting invite ● Use the Advanced Options toggle to set your meeting controls. These can be adjusted later, but it is best to set up these features when scheduling. You may decide to mute participants upon entry to the meeting, allow participants to unmute themselves during the meeting, enable breakout rooms, allow participants to take notes or use the chat feature, enable closed captions, etc.
▢	Enable necessary tools ● Annotation tool ● Breakout rooms ● Polls ● Chat ● Document sharing ● Note taking ● File transfers
▢	Set up polls ● Are they single choice or multiple choice? ● Do you want your polls set up on a timer?
▢	Check your meeting settings ● Do you want to disable private chat? ● Do you want to enable or disable annotation? ● Do you want to enable a lobby?
During your practice session:	
▢	Test your microphone and camera ● Presenter: Can your Producer see and hear you? ● Producer: Can your Presenter see and hear you?
▢	Launch your slides ● Can your Producer see them? ● Can you view your slide notes?
▢	Decide how you are sharing your handouts ● Are you sending them prior to the session or after the session?

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	● If you want Participants to get handouts during the session, you can share via the file transfer feature. ○ Note: some devices will not be able to send or download a handout via the file transfer feature.
▢	Run through your entire session ● Is the timing correct? Do you need to cut or add anything?
▢	Discuss with your Producer what their responsibilities are for each activity ● How will you communicate with one another during the session? ● What are the back-up plans if something goes wrong? ● Where do you anticipate people struggling with the technology? How can you be prepared to alleviate some of this stress?
▢	Have the Producer practice launching polls, running breakout sessions, and clearing annotations and feedback indicators. ● Can you view the poll that the Producer launched? ● Are you able to broadcast the poll results? ● Are you able to access a breakout room and come back from the breakout room? ○ Tip: Have family members or co-workers join your session to send off to breakout rooms ● Are you able to broadcast a message to breakout room Participants? ● Are you able to respond to a help message from breakout rooms? ● Are you able to clear annotations that Participants add? ● Are you able to clear all feedback indicators?
▢	Share the lesson plan and slides with your Producer so that they can take over in the event of a technical disaster

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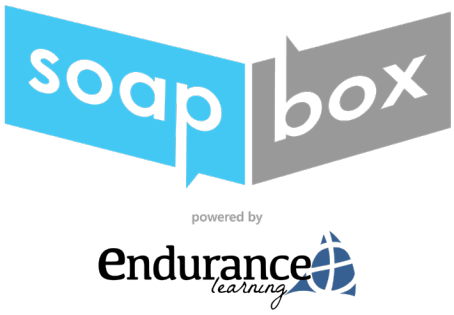
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