



Managing Your Meeting

As host, your responsibilities include overall management of the meeting. The meeting window provides a forum for you to manage all aspects of the meeting and enable participants to chat, send video, share information and interact with each other through documents, presentations, whiteboards, applications, and more.

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The Meeting Window

A Quick Tour of the Meeting Window

The meeting window provides a forum for you to share information and interact with participants using documents, presentations, whiteboards, applications, and more.

You share or view content using the tools in the meeting window. You can use panels to chat, take notes, and perform other tasks.

When you start or join a meeting, your meeting window opens with the Quick Start area on the left and a panel area on the right. Nearly everything you want to accomplish in a meeting can be done from these areas:

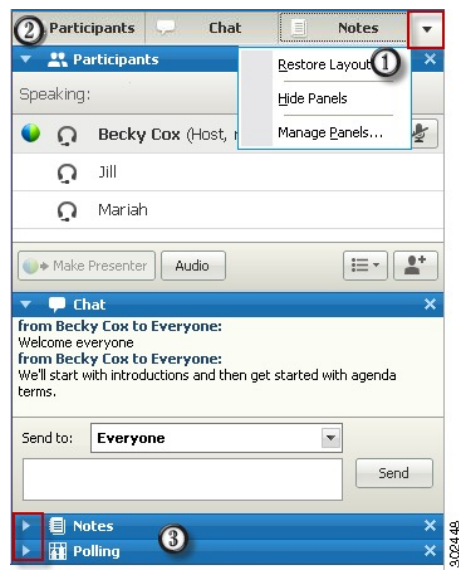


1	Choose an audio device for listening and speaking
2	Invite or remind people to join
3	Share your application or desktop
4	Share your desktop, a file, or an application
5	Share a whiteboard
6	Record the meeting
7	Interact with other participants

Working with Panels

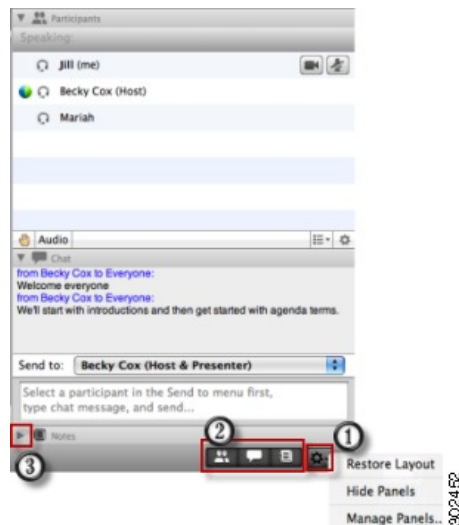
When your meeting window opens, the area on the right displays some default panels. Other panels are available from an icon tray at the top of the panels area.

Windows



1	Select the down arrow on the icon tray to display the Panels menu.
2	Select an icon from the icon tray to open or close a panel.
3	Select the arrow on the title bar to expand or collapse a panel. Tip To access panel options, right-click in the panel title bar.

Mac



1	Select the options icon on the icon tray to display the Panels menu.
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2	Select an icon from the icon tray to open or close a panel.
3	<p>Select the arrow on the title bar to expand or collapse a panel.</p> <p>Tip To access panel options, right-click in the panel title bar.</p>

Interacting With Other Participants

After you start or join a meeting, the meeting window opens and on the right side, you can see all participants who are in the meeting. As other people join, you will see their names appear in the list.

You can interact with other participants in the meeting in different ways, depending on your role:

Role	Task Description
Host	<ul style="list-style-type: none"> • View who's in the meeting • Use video to see others and have them see you • Make someone else the presenter • Chat with a specific participant • Invite someone else • Remind an invitee to join the meeting
Participant	<ul style="list-style-type: none"> • View who's in the meeting • Use video to see others and have them see you • Chat with a specific participant



Note

You can set preferences that assign specific sounds to participant actions, for example, when a participant joins or leaves a meeting. To change preferences:



- Windows: Choose **Edit > Preferences**
- Mac: Choose **Meeting Center > Preferences**

Managing Panels

You can determine which panels are displayed in the meeting window, and in which order they will be displayed.

Procedure

Step 1 Depending on your platform, click the options button on your panels icon tray:

- Windows: 
- Mac: 

Step 2 Choose **Manage Panels**.

- Use the **Add** or **Remove** buttons to specify which panels should display in your meeting window.
- Use the **Move Up** or **Move Down** buttons to specify the order of the panel display.
- Click the **Reset** button to restore the panel view to the default layout.
- Clear the check box beside **Allow participants to change the sequence of panels** if you want to permit attendees to manage their own display of panels.



Step 3 Select **OK**.

Restoring the Panel Layout

Complete this task to restore the panel layout to what it was when you first joined the meeting or to what you specified in the **Manage Panels** dialog box.

Procedure

Step 1 Depending on your platform, click the options button on your panels icon tray:

- Windows: 
- Mac: 

Step 2 Choose **Restore Layout**.

Accessing Panel Options

Each panel provides a menu of commands related to the panel. For example, Expand Panel and Close Panel are two common commands for all the panels.

Depending on what operating system you are using, access the commands for a panel by following these steps:

- Windows—Right-click the panel title bar to see a menu of commands related to the panel.
- Mac—Select **ctrl** and then click to see a menu of commands related to the panel.

Panels	Options
Participants	<p>Sound Alerts: Lets you choose a sound to play when a participant:</p> <ul style="list-style-type: none"> • Joins a meeting • Leaves a meeting • Selects the Raise Hand icon on the Participants panel <p>Assign Privileges: Displays the Participant Privileges dialog box.</p>
Chat	<p>Sound Alerts: Lets you choose the kinds of chat messages for which you want a sound to play. Select a sound from the drop-down list or click Browse to find a sound in a different location on your computer.</p> <p>Assign Privileges: Displays the Participant Privileges dialog box.</p>

Panels	Options
Notes	<p>Notes: Displays the Meeting Options dialog box, where you can set note-taking options as well as other options:</p> <ul style="list-style-type: none"> • Allow all participants to make notes: Lets all participants take their own notes during the meeting, and save them to their computers. • Single notes taker: Lets only one participant take notes during the meeting. By default, the host is the note-taker, but can designate another participant as the note-taker during the meeting. A note-taker can publish notes to all attendees at any time during the meeting. The host can send a transcript of the notes to participants at any time. • Enable Closed Captioning: Lets only one participant—the closed captionist—take notes during the meeting.

Resizing the Content Viewer and Panels Area

When you are sharing a document or presentation, you can control the size of the content viewer by making the panel area narrower or wider. Simply click the dividing line between the content viewer and the panels and do the following:

- Drag the line to the left to make the area devoted to the panels wider.
- Drag the line to the right to make the content viewer larger.



Note







This feature is unavailable when you are sharing your desktop, an application, or a web browser.

Accessing Panels from the Meeting Controls Panel

While you are sharing a document in full-screen view, or sharing an application, desktop, or web browser, you can access panels from the Meeting Controls panel:



1	Displays icons for working with attendees
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2	Displays a maximum of 4 panel icons. You can open any remaining panels from the menu that appears when you select the down arrow.
	Stops sharing and returns to the meeting window.
	Provides access to meeting controls and panels that are not usually displayed on the Meeting Controls panel, such as Polling and Notes.
	Displays the Participants panel.
	Displays the Chat panel.
	Displays the Annotation Tools panel.
	Displays the Recorder panel.

Viewing Panel Alerts

You will see an orange alert if a panel is collapsed or closed and requires your attention.

Some reasons for seeing alerts:

- A participant arrives or leaves a meeting
- A participant starts or stops sending video
- A Raise Hand indicator appears in the Participants list
- The note taker publishes notes
- A participant sends a chat message
- A poll opens or closes
- Poll answers are received

The panel remains in the alert status until you open and view the change.

Working With Invitees

Reminding Invitees to Join Your Meeting

If you see that some invitees have not yet joined after the meeting starts, complete this task to send an email reminder.

Before You Begin

This task is completed in the meeting window.

Procedure

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- Step 1** Select **Invite & Remind** on the Quick Start page.
The **Invite and Remind** window displays.
 - Step 2** Select the **Remind** tab.
All invitees who are not in the meeting are automatically chosen to receive the reminder.
 - Step 3** Uncheck the box beside any person you don't want to remind.
 - Step 4** Select **Send Reminder**.
An email reminder is sent to each person selected.
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Inviting People by Email or Phone During a Meeting

After you start your meeting, you may find that you forgot to invite a stakeholder or someone else who should be in the meeting.

Procedure

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- Step 1** Select **Invite & Remind** on the **Quick Start** page.
The **Invite and Remind** dialog box appears.
 - Step 2** Invite someone to the meeting by one of the following methods:
 - **Email:**
 - Enter the email addresses of any new invitees and select **Send** to have WebEx send the invitation emails or
 - Select **Copy** to copy the meeting URL then paste the link into a Microsoft Outlook message to send your own invitation email.
 - **Phone:** Enter the invitee name and phone number and select **Call**.

Note You can speak to the invitee privately, then add the invitee to the general meeting. If you are not yet connected to the audio conference, the invitee receives a phone call to join the audio conference.

Changing Presenters

Depending on your site settings, a participant can become the presenter in the following ways:

- The first person to join automatically becomes the presenter.
- If you are the host, you can make a participant the presenter before sharing or during sharing.

Making a Participant the Presenter When You Are in the Meeting Window

During a meeting, you can make any meeting participant the presenter—also referred to as "passing the ball". Any presenter can also pass the ball to make another participant the presenter.

There are numerous ways to make someone the presenter depending on how you are viewing participants. Here are a couple of quick ways to make someone else the presenter.



Tip

Use the docked tray at the top of your screen to change presenters when you are sharing.

If	Do One of These
You are viewing a list of participants	<ul style="list-style-type: none"> • Drag the ball from the last presenter to the next presenter. • Choose a name and select Make Presenter. • Right-click and select presenter from the drop down list
You are viewing participant thumbnails	<ul style="list-style-type: none"> • Mouse over a thumbnail and select Make Presenter. • Choose a thumbnail, then select Make Presenter.

The participant becomes the presenter with all associated rights and privileges for sharing information.

Making a Participant the Presenter When You Are Sharing

When you are sharing your desktop, an application, or files in full screen mode, the docked tray at the top of your screen provides an easy way to change presenters. Complete the following task to make someone else the presenter using the docked tray.

Procedure

- Step 1** Mouse over the bottom of the docked tray to expose it.
 - Step 2** Select **Assign**, then **Make Presenter**.
 - Step 3** Select a participant.
The participant becomes the presenter with all associated rights and privileges for sharing information.
- Note** You can make someone else the presenter from the participant list when you are in the meeting window.
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Transferring the Host Role

As a meeting host, you can transfer the host role—and thus control of the meeting—to a participant at any time. This option can be useful if you need to leave a meeting for any reason.

Before You Begin

If you plan to reclaim the host role later, write down the host key that appears on the Meeting Info tab in the meeting window.

Procedure

- Step 1** In the Participants list, right-click the name of the person to whom you want to transfer the host role.
 - Step 2** Select **Change Role To > Host**.
A confirmation message appears in which you can verify that you want to transfer control of the meeting to the participant whom you selected.
 - Step 3** Select **OK**.
The word (host) appears to the right of the participant's name in the Participants list.
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Reclaiming the Host Role

If a participant has control of a meeting, you can take it back by reclaiming the host role.

**Tip**

If you leave a meeting—whether intentionally or inadvertently—and then log back in, the system automatically restores your host role once you rejoin.

Before You Begin

You will require the host key to complete this task. If you did not write it down before transferring the host role to another participant, you can ask the current host to send it to you in a private chat message. The host key appears on the current host's Meeting Info tab in the content viewer.

Procedure

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- Step 1** In the Participants list, select your own name.
- Step 2** On the Participant menu, choose **Reclaim Host Role**.
The **Reclaim Host Role** window displays.
- Step 3** Enter the host key.
- Step 4** Select **OK**.
In the Participants list, the word (host) appears to the right of your name.
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Obtaining Information About a Meeting in Progress

In the meeting window, choose **Meeting > Information**.

The Meeting Information window displays general information about the meeting, including the following:

- Meeting name or topic
- Location, or URL, of the website where the meeting is taking place
- Meeting number
- Teleconferencing information
- Current host
- Current presenter
- Current user—that is, your name
- Current number of participants
- Access code

Editing a Message or Greeting During a Meeting

When scheduling a meeting, you can create a message or greeting to welcome your meeting participants and provide important information or special instructions. Optionally, you can specify that your message appears

for participants as soon as they join the meeting. The following task describes how to edit your message during a meeting.

Procedure

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- Step 1** In the meeting window, choose **Meeting > Welcome Message**.
The **Create an Attendee Greeting** page appears.
- Step 2** Check **Display this message when attendees join**.
The message or greeting automatically appears once the participant joins the meeting.
- Step 3** Edit the message in the Message box.
A message or greeting can contain a maximum of 255 characters.
- Step 4** Select **OK**.
Note Participants can view the message or greeting at any time by choosing **Meeting > Welcome Message**.
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Restricting Access to a Meeting

Once a host starts a meeting, the host can restrict access to it at any time. This option prevents anyone from joining the meeting, including invitees who have not yet joined.

Before You Begin

You must be the meeting host to complete this task.

Procedure

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- Step 1** In the meeting window, choose **Meeting > Restrict Access**.
Participants can no longer join the meeting.
- Step 2** (Optional) To restore access to the meeting, choose **Meeting > Restore Access**.
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Related Topics

[Removing a Participant From a Meeting](#), on page 13

Removing a Participant From a Meeting

The meeting host can remove a participant from a meeting at any time.

Before You Begin

You must be the meeting host to complete this task.

Procedure

- Step 1** In the meeting window, open the Participants panel.
- Step 2** Select the name of the participant whom you want to remove from the meeting.
- Step 3** Navigate to the top menu bar and choose **Participant > Expel**.
A confirmation message appears in which you can verify that you want to remove the participant from the meeting.
- Step 4** Select **Yes**.
The participant is removed from the meeting.
- Tip** To prevent an expelled participant from rejoining a meeting, restrict access to the meeting.
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Related Topics

[Restricting Access to a Meeting, on page 13](#)

Ending a Meeting

Once you end a meeting, the meeting window closes for all participants. If the meeting includes an integrated voice conference, the audio also ends.

Procedure

- Step 1** In the meeting window, choose **File > End Meeting**.
A confirmation message appears, in which you can verify that you want to end the meeting.
- Step 2** (Optional) If there is any meeting information that you have not yet saved, you can save it now—including shared files, chat messages, poll questionnaires, poll results, or notes.
- Step 3** Select **Yes**.
The meeting window closes.
- Tip** Alternatively, as the meeting host, you can leave a meeting without ending it. Before you leave a meeting, first transfer the host role to another participant.
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