



Managing and Taking Notes

When scheduling a meeting, the host can specify the default note-taking options that take effect once the meeting starts. During a meeting, the presenter can change the default note-taking options at any time.

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About Taking Notes

During a meeting, one or more meeting participants with access to the notes feature can take notes on the Notes or Closed Caption panel in the meeting window. Only one participant performs closed captioning.

If all participants are allowed to take notes, they cannot publish their notes to others during the meeting. However, participants can save their notes at any time during the meeting.

The meeting host can select the single note taker during the meeting. A single note taker can publish notes at any time during the meeting or send a meeting transcript containing the notes to all participants.

If needed, the host can also select a closed captionist. A closed captionist can publish captions in real-time during the meeting and can also send a transcript containing the captions to all participants.

Taking Personal Notes

If the meeting host or presenter has selected the option to allow participants to take personal notes, you can type your notes on the Notes panel in the meeting window.

Procedure

- Step 1** In the meeting window, open the Notes panel.
 - Step 2** Type your notes in the box.
 - Step 3** (Optional) Select **Save** to save your notes to a text file on your computer.
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Taking Public Notes (Meeting Minutes)

If the meeting host has designated you as the single note taker for a meeting, you can type notes on the Notes panel in your meeting window. Your notes are not visible to other meeting participants until you publish them. You can publish your notes at any time during the meeting.

Procedure

Step 1 In the meeting window, open the Notes panel.

Step 2 Type your notes in the box.

Step 3 (Optional) To publish your notes so they appear in each participant's Notes panel, click **Publish**.

Note If the Notes panel is not selected on a participant's meeting window once you publish notes, the participant sees an alert.

Saving Notes to a File

If you are taking personal or public notes (meeting minutes) or closed captions during a meeting you can save your notes or closed captions to a text file on your computer. You can also save any notes or closed captions that another note taker or closed captionist publishes on your Notes or Closed Caption panel.

Once you save new notes to a file, you can save changes to the notes or save a copy of the notes to another file.

Saving New Notes

1 On the Notes or Closed Caption panel, click **Save**.

The **Save Notes As** dialog box appears.

2 Choose a location at which to save the file.

3 Type a name for the file.

4 Select **Save**.

WebEx saves the file at the location you chose. Its file name has a .txt extension.

Saving Changes to Notes

On the Notes or Closed Caption panel, click **Save**.

WebEx saves the file at the location you chose. Its file name has a .txt extension.

Saving a Copy of Notes to Another File

1 In the meeting window, select **File > Save As**, and then choose **Notes**.

The **Save Notes As** dialog box appears.

2 Do either or both:

- Type a new name for the file.
- Choose a new location at which to save the file.

3 Select **Save**.

WebEx saves the file at the location you chose. Its file name has a .txt extension.



Tip

Alternatively, you can save all of the following meeting information to files at once:

- Shared presentations or documents
- Chat messages
- Notes
- Poll questionnaire
- Poll results
- Closed captions

To save all information at once, select **File > Save All**. In this case, the files are saved under their default file names. If you have already saved a file using another name, it is not overwritten.

Specifying Note-Taking Options (Windows)

Procedure

- Step 1** In the meeting window, select **Meeting > Options**.
The **Meeting Options** dialog box appears, with the **General** tab selected by default.
- Step 2** Select the note-taking option you want and click **OK**.
- To turn the notes option on or off, check or uncheck the **Notes** check box.
 - To turn the closed captions option on or off, select or clear the **Enable Closed Captioning** check box.

Specifying Note-Taking Options (Mac)

Procedure

- Step 1** On the **Meeting Center** menu, select **Preferences**.
- Step 2** Select **Tools**.
- Step 3** Select the note-taking option you want and click **OK**.

- To turn the notes option on or off, check or uncheck the **Notes** check box.
- To turn the closed captions option on or off, check or uncheck the **Enable Closed Captioning** check box.

- Note**
- Once you change the notes option, any published notes or closed captions are removed from each participant's Notes or Closed Caption panel. Be sure to ask participants to save notes or closed captions before you change the notes option.
 - When scheduling a meeting, the meeting host can specify the default note-taking options, which take effect once the meeting starts.
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Designating a Note Taker (Windows)

If the single note taker or closed captions option is set for a meeting, you can designate any participant or closed captionist to be the note taker. You can set the notes option when scheduling a meeting. Alternatively, a presenter can set the notes option during a meeting.

Procedure

Step 1 On the Participants panel, select the participant you want to designate as note taker.

Step 2 Right-click and then select **Change Role To > Note Taker**.
A pencil indicator appears to the right of the participant's name in the participant list.

Note If you select another participant to take notes or closed captions, any notes or closed captions that were previously published remain on display in the Notes or Closed Caption panels. The new note taker or closed captionist cannot edit the existing notes.

Designating a Note Taker (Mac)

If the single note taker or closed captions option is set for a meeting, you can designate any participant or closed captionist to be the note taker. You can set the notes option when scheduling a meeting. Alternatively, a presenter can set the notes option during a meeting.

Procedure

Step 1 On the Participants panel, select the participant you want to designate as note taker.

Step 2 Select **ctrl** and then click; then select **Change Role To > Note Taker**.
A pencil indicator appears to the right of the participant's name in the participant list.

Note If you select another participant to take notes or closed captions, any notes or closed captions that were previously published remain on display in the Notes or Closed Caption panels. The new note taker or closed captionist cannot edit the existing notes.

Enabling Closed Captions

You can easily select the option for closed captions and appoint a participant to transcribe the closed captions.

Procedure

- Step 1** Do one of the following:
- Windows: In the meeting window, select **Meeting > Options**.
 - Mac: Select **Meeting Center > Preferences**, then select **Tools**.
- Step 2** To turn the closed captioning option on or off, check or uncheck **Enable Closed Captioning**.
- Tip** To select another participant to transcribe, select the participant's name in the participants list; then right-click (Windows) or select ctrl and then click (Mac) and select **Change Role To >Closed Captionist**.
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Designating a Closed Captionist

Before You Begin

The closed caption option must be enabled before you can complete this task.

Procedure

- Step 1** In the participant list, select the participant you want to designate as a closed captionist.
- Step 2** Do one of the following:
- Windows: Right-click and select **Change Role To > Closed Captionist**.
 - Mac: Select **ctrl** and then **click**. Then select **Change Role To > Closed Captionist**.

A closed caption indicator appears next to the participant's name in the participant list.

Related Topics

[Enabling Closed Captions, on page 5](#)

Providing Closed Captions

If the meeting host has designated you as the closed captionist for a meeting, you can type captions on the Closed Captions panel in your meeting window. To type captions, you can use either a standard keyboard, or a steno keyboard and machine translation software.

Your captions are visible to other meeting participants in real-time, one line at a time. You can also send your captions in a meeting transcript to all participants.

Before You Begin

Make sure that closed captions are enabled.

Procedure

- Step 1** Open the Closed Caption panel.
 - Step 2** Type your captions in the box.
 - Step 3** Press Enter on your keyboard or **Publish** on the Closed Caption panel.
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Related Topics

[Enabling Closed Captions, on page 5](#)