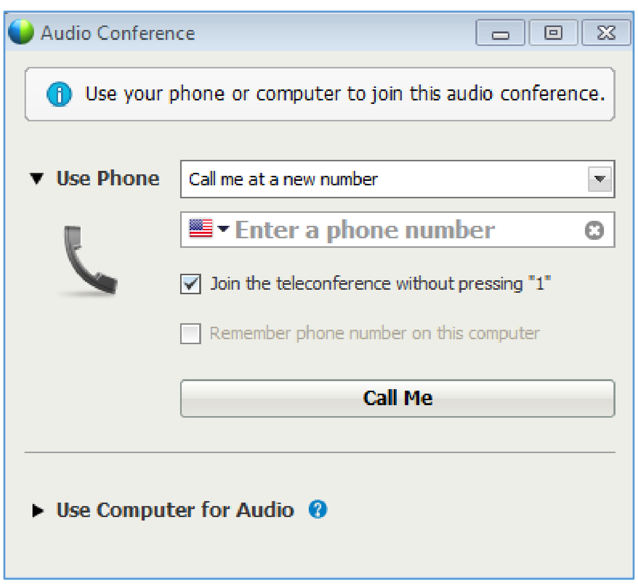
Virtual Platform Checklist for WebEx Training Center

WebEx Training Center is a powerful online meeting tool used to create engaging virtual training. To create an effective learning experience, become familiar with the features and options that are available. Features themselves do not create engagement. It is how they are used that makes the difference!

Listed below are the most common features used to create and deliver an online learning event.

√	Feature	√	Feature
☐	Audio	☐	Q&A
☐	Breakout	☐	Recording
☐	Chat	☐	Share Desktop, Application or Web Browser
☐	Feedback	☐	Share File (Including Video)
☐	File Transfer	☐	Web cam
☐	Participants Panel	☐	Whiteboard
☐	Polling	☐	Whiteboard Tools / Annotation Tools

Audio: Use Phone or Use Computer for Audio



When to use:
Always require attendees to join audio, whether it is VoIP or a teleconference. Make sure they not only join, but have a clearly audible connection/line, that they eliminate background noise, use a hands-free headset and can control the mute and unmute themselves.

How to activate:

- Select the options audio based on your account's options when scheduling the session.
- Teleconference: Know the difference between "call me at a new number" and "I will call in."
- VoIP: Avoid using a wireless internet connection and use a high quality headset with noise cancellation.

Note: Attendees always need help understanding how to connect to the audio. Be prepared with a slide or send them the information in advance.

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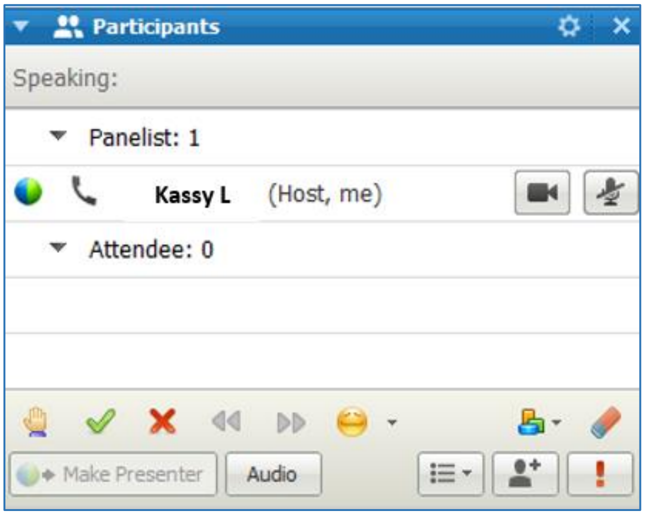
<tr>
<td>Participants Panel
</td>
<td>When to use:
Participants Panel is your key to who is online, how their audio is connected and what feedback they are providing throughout the session. Focus more here than on your slides to engage your audience!

How to activate:
• It is enabled by default. You can minimize it and close it using the buttons in the corners. Click them again to re-open if you lose the panel.

Note: You will see a person's name appear first, and then either a phone or headset icon. If there is no icon, look for a "call – in user." That is likely the person with no icon next to their name. This means the person dialed into the teleconference without referencing his/her attendee ID number. Have the person enter it from the Audio Panel in order to connect the phone icon to his/her name. You'll need this so that breakout sessions will run smoothly.</td>
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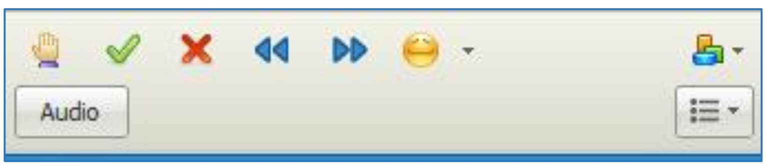
<tr>
<td>Feedback
</td>
<td>When to use:
The feedback tools are a simple and highly effective way to check in with attendees. This is your online connection to the types of non-verbal cues they give during in-person events. Encourage attendees to click the green check any time they are nodding their head in agreement. For example, tell them:
"Give me a green check if…"
"Let's applaud your colleagues' efforts!"

How to activate:
• Feedback is available by default from the bottom of the Participants Panel
• Show participants where to locate them and request they click on the options as needed.
• Use the feedback yourself as a way to model the type of interaction you request from participants.</td>
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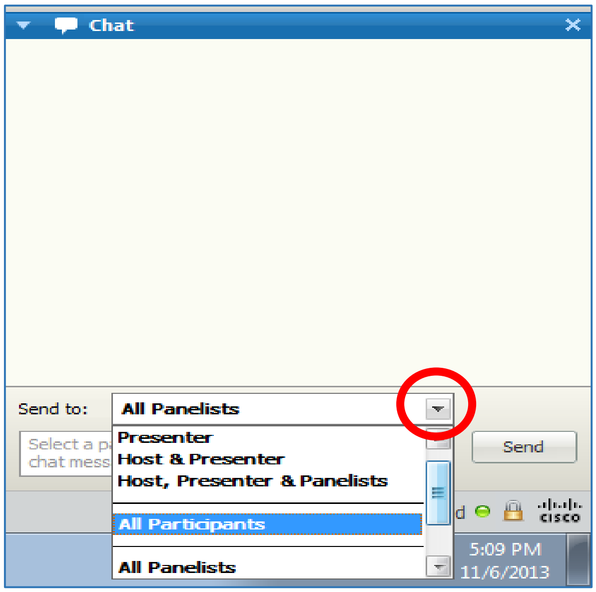
Chat



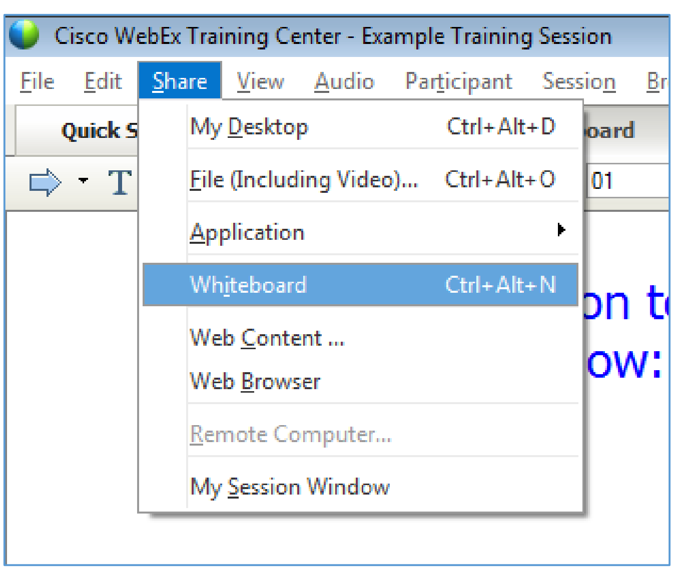
When to use:
Chat is one of the main methods of communication in the virtual classroom. Do not underestimate the power of this simple tool as it can be your main lifeline! Use it for commentary, questions and conversations. Create "**chatversations**"! Send links through chat to quickly provide online resources to participants.

How to activate:

- The chat panel is included by default.
- "All Participants" chat is a public chat, seen by all people in the session.
- Adjust the level of chats available to participants from the attendee privileges in the Participant menu bar option. Enable all chat options for the most effective level of interaction.

Note: Have a Private chat by clicking on the dropdown next to All Participants. Select the name of the person you wish to privately chat with. You will see "privately" in parentheses to indicate who the chat is being seen by. Beware of "All Attendees" chat as anyone who is a member of the panel will **not see** these messages. All Panelists include host, presenter and panelists. All Attendees is everyone else but the panel.

Whiteboard

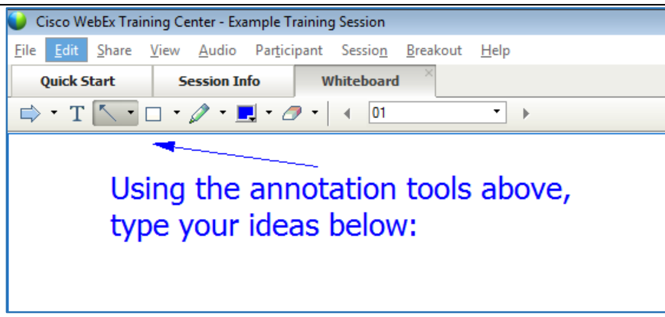


When to use:
Use this tool for collaborative activities like brainstorming and creative thinking. Remember that **whiteboard is a verb**. Whiteboarding answers and ideas is one of the most effective ways to gauge participation levels. It not only provides immediate responses, but it is also easy to save results and refer back to them at a later time.

How to activate:

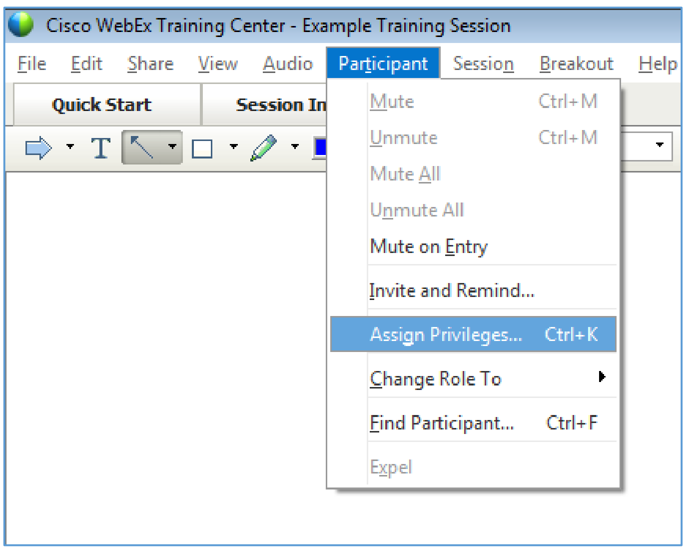
- From the Share menu.
- Click Share > Whiteboard.
- Also, create .PowerPoint slides with enough blank space that provides participants with enough room for whiteboarding their ideas!

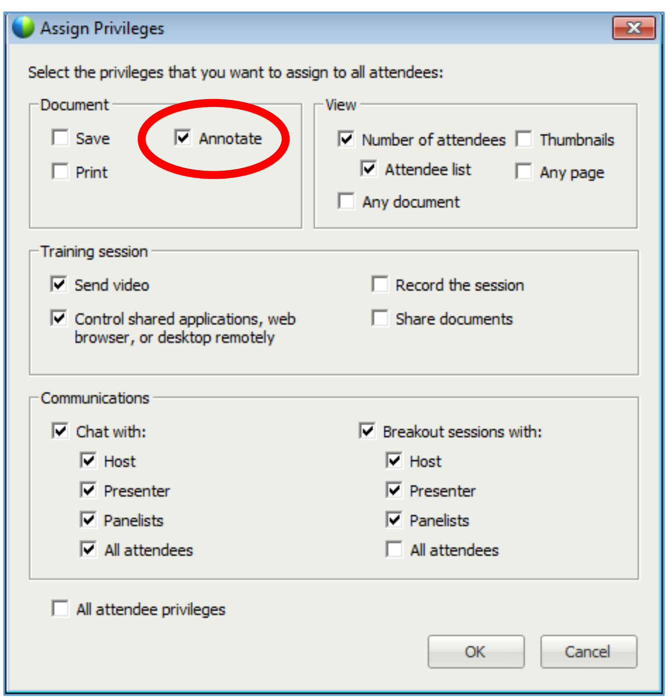
TIP: Have participants place their WebEx pointers on the whiteboard space prior to typing a response. This is called "claiming their real estate" and will keep them from typing over one another.



Note: See Whiteboard (Annotation) Tools for directions on how to activate them for participants.

Whiteboard Tools / Annotation Tools



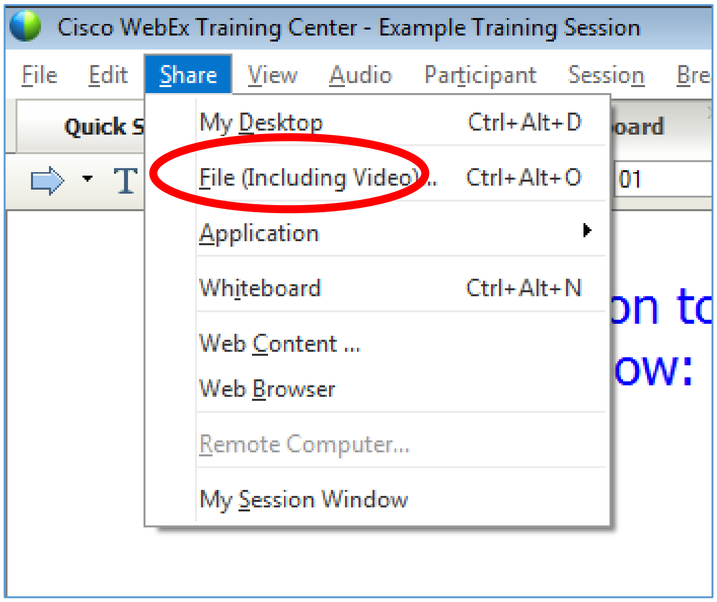


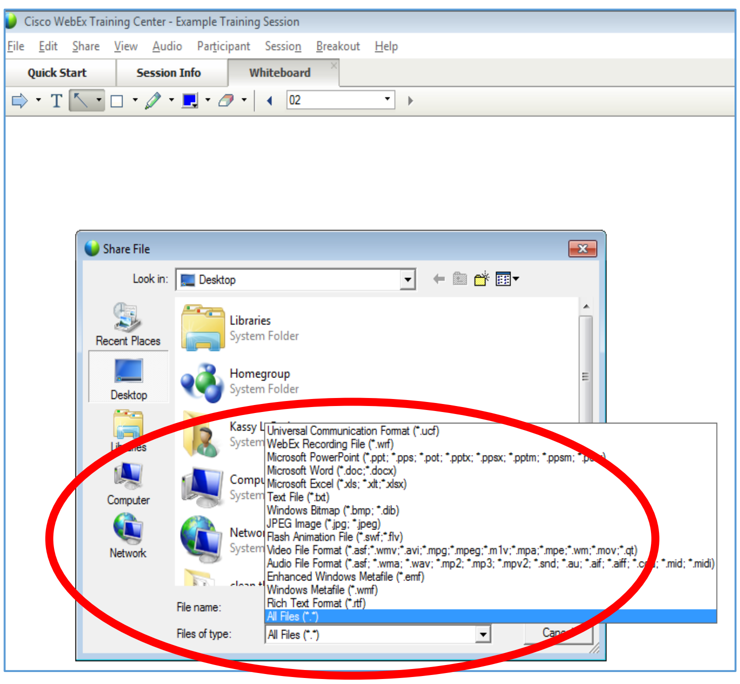
When to use:
Enable the "Annotation" privileges to allow participants to collaborate and write their ideas and comments on the files shared or on a whiteboard.

How to activate:

- Click the Participant menu.
- Click Assign Privileges.
- Select Annotate and then click OK.

Share File (Including Video)…





When to use:
Share files (for example PowerPoint files) that are prepared for interaction with enough blank space for whiteboarding answers to questions, thoughts and ideas. Files can be annotated upon for increased interaction and engaging activities. Use compelling images rather than words and ask your participants to respond using the chat, the feedback, and the whiteboard tools.

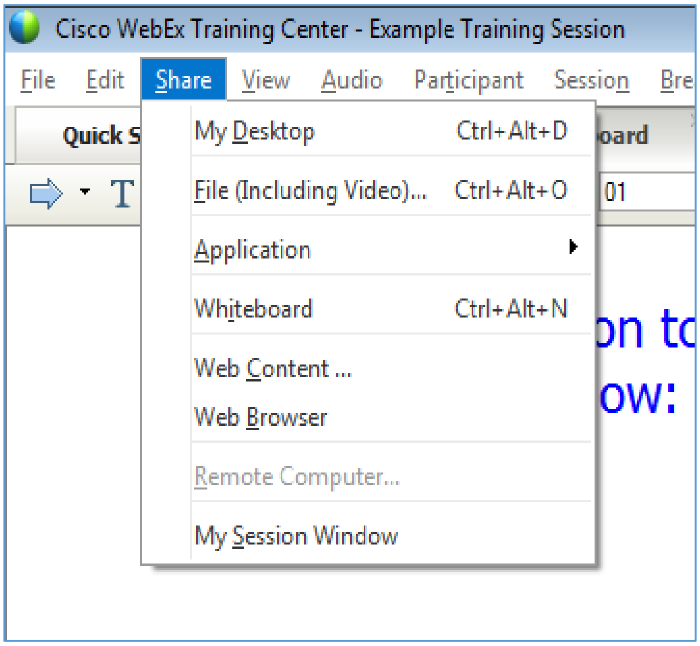
How to activate:

- Click Share > File > Browse My Computer and double click the file.
- Note the type of files that are recognized and compatible with WebEx by clicking on the dropdown next to "Files of type" on the bottom of the dialog box.

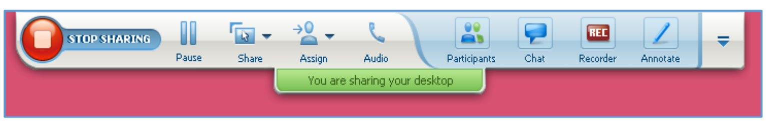
Note: See Whiteboard Tools above to allow attendees to collaborate on a shared file.

TIP: Develop the slides to be uploaded in this way so they become the "working space" for the event. There is no need to share the PowerPoint application unless you need to use the application itself, for example to teach it.

Share Desktop, Application or Web Browser



Stop Sharing:



When to use:
Software and systems training is often conducted live online using desktop, application or web sharing. Allow attendees to view the entire desktop, one application at a time, or even a web page since the person presenting controls the navigation of it. Think of it as if others are looking over your shoulder as you present from your computer. They see your mouse, and if you are desktop sharing, any popups you may get. Be careful!

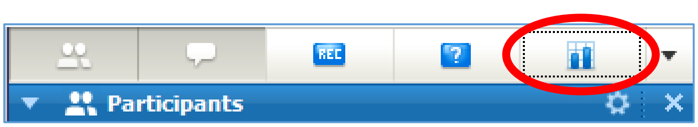
Attendees do not need the software on their computers to view it from yours. For hands-on training however, ask attendees to open their own applications and toggle between the WebEx window and their application as you demonstrate the steps.

How to activate:

- From the Share Menu, click My Desktop to share all applications on your computer, then Application to choose which one at a time you would like to show, or Web Browser to launch your browser and navigate to a web page or a *web-based application.
- Click Stop Sharing when ready to return.

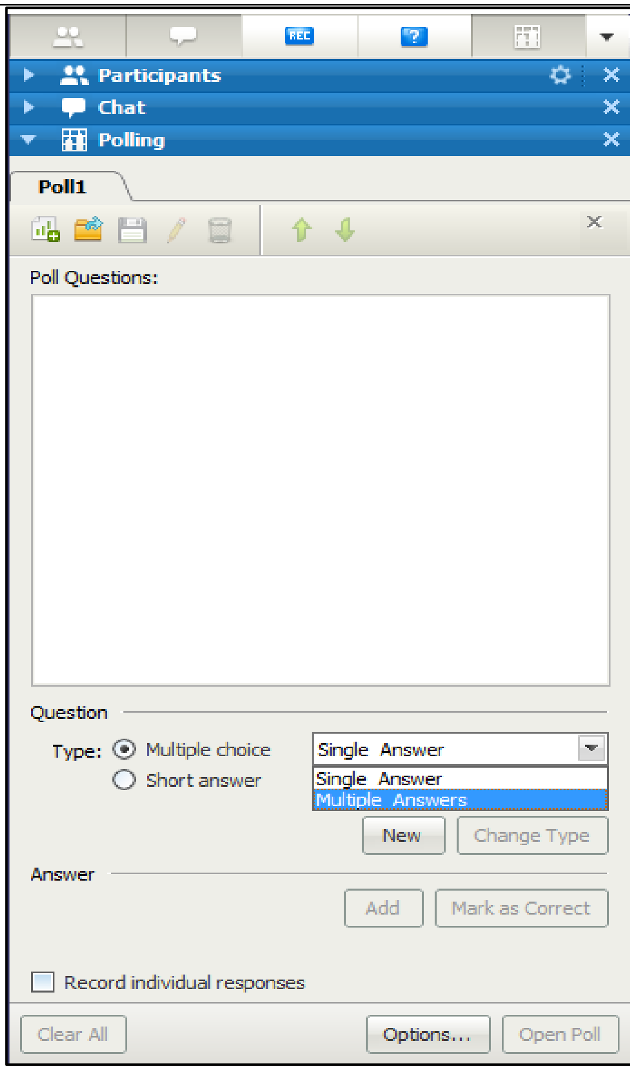
Note: When sharing a web-based application using Share > Web Browser, if the application needs to use another application that is not we- based, it is best to use Share > Desktop to ensure that window is also seen by the participants. Share > Web Browser only shares web pages in the browser.

Polling



When to use:
You can survey attendees with prepared questions and answers using Polling. Create the polling files (.atp) in advance and save them to use them repeatedly in your live online sessions. Do this inside a meeting using the polling panel. WebEx poll files can include one question, or many on the same file. Those questions can be multiple choice, multiple answer or short answer.

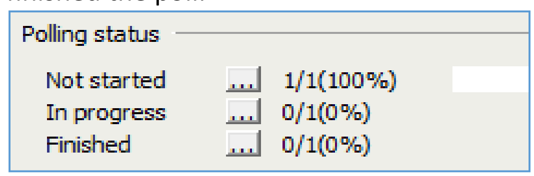
Remember to respond appropriately to the answers and build your comments and discussion into the



training experience. Avoid polling just to "get interaction."

How to activate:

- Click on Manage Panels and add the Polling panel.
- Open one poll at a time from the polling panel at any time during the session.
- Click Edit if needed.
- Click Open Poll when it is time to run it.
- Click on the polling status boxes (…) at any time to see who has not started, is in progress or has finished the poll.



- Click Close Poll and then determine which poll results to Apply and share with attendees.

Note: The polling results can be saved in various formats to be used in different programs. Be sure to click file > save > polling results as needed.

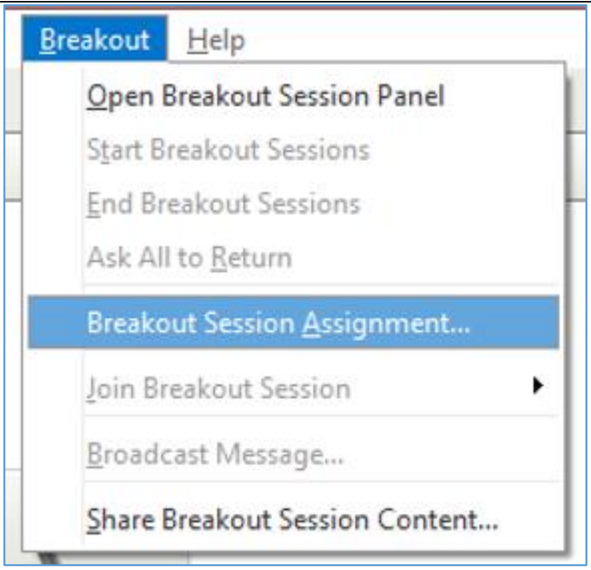
TIP: Download the **WebEx Poll Questionnaire Editor** from your WebEx Training Center site under Support > Downloads. A Host login is required and the editor is found in your computer's list of programs. This will allow you to create polling files without have to first launch a live WebEx session.

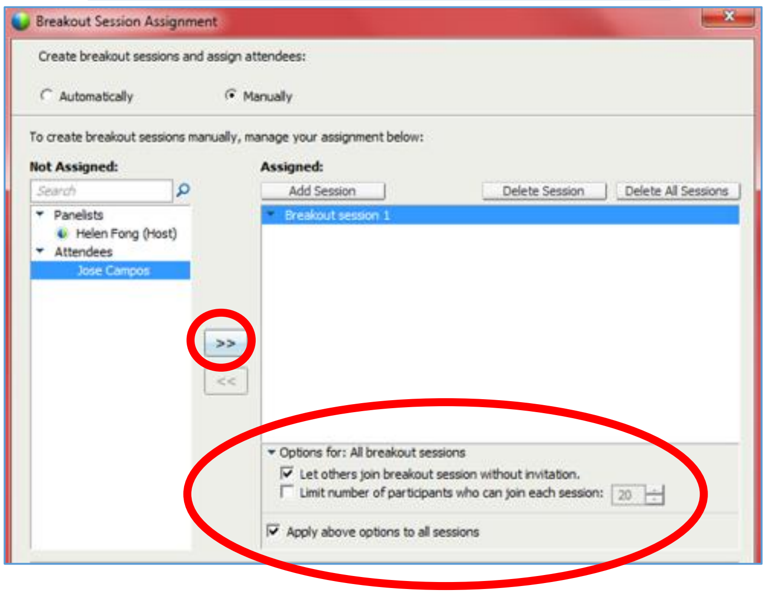
Breakout

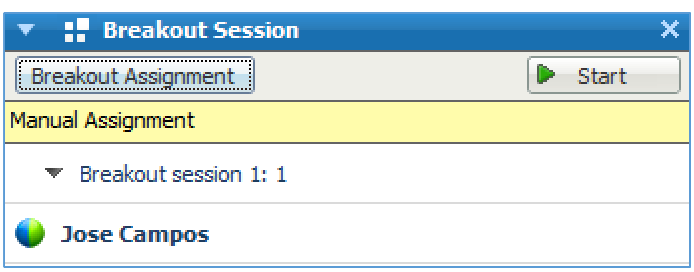
When to use:
Working in small groups with other online participants is an effective and engaging way to apply key learnings from any training event. Use breakouts for activities like role plays, problem solving and case studies where teams work together to create solutions and share ideas.

How to activate:

- From the Breakout menu options, click on the Breakout Session Assignment.
- Click Add Session to add the number of sessions needed.
- Select each participant's name, then the room he or she needs to join and then click the ">>"







A short and simple tutorial:
https://www.youtube.com/watch?v=LQnTrL1Jyk8

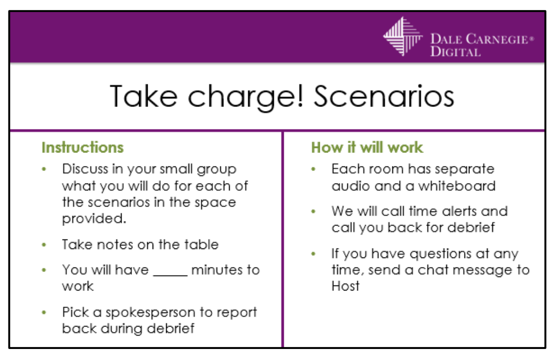
button to add him or her to the assigned breakout room.

- Click OK once all the rooms are planned.
- All the rooms and their assigned presenters and attendees will be listed on the Breakout Panel.
- Start Breakouts when ready.
- To join each breakout select it and then click Join.
- Leave each breakout and return to the Main Room.
- Send a Broadcast Message from the Breakout Menu as needed.
- End Breakouts when ready.
- If a whiteboard or .PowerPoint slide was shared in the breakouts, request each attendee Share Breakout Session Content from the Breakout Menu during the debrief.

Note: Be sure to mark "Let others join the breakout without invitation from the 'Options for: All breakout sessions' so that latecomers can join a breakout once it has started. They join just as you would. They choose the breakout, then click Join.

TIP: Create a slide in your visuals that includes two sets of instructions for all breakout activities:
1. Activity instructions.
2. Technical directions.

Refer to the example activity below:



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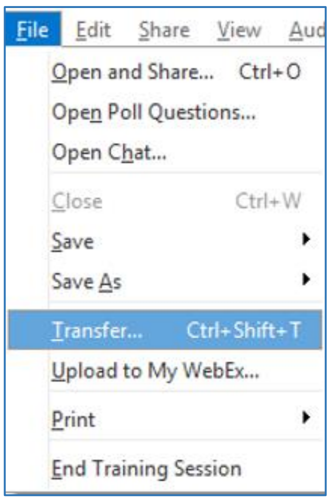
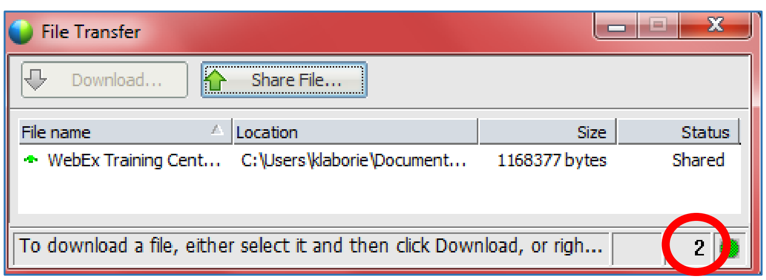
File Transfer





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When to use:
Handouts and manuals can be easily provided to attendees using File Transfer. Load class materials for quick access as needed.

How to activate:

- Click File > Transfer (must be Presenter).
- Click Share File and browse your computer for the file to upload. Double click to add it.
- Attendees click on each file one at a time and then click Download to save them locally to their own computers.

Note: The number in the bottom right corner indicates how many attendees have the file transfer window open. Ask them to close it once they have the file so you know when they are done!

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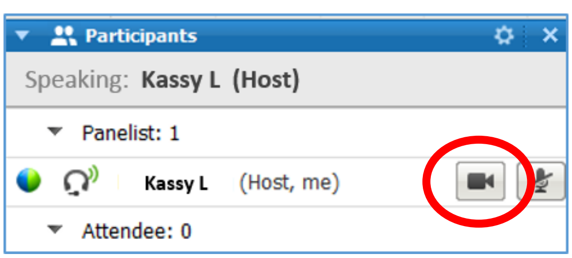
Web cam



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When to use:
Using a web cam personalizes a live online learning event. It works well for introductions or any time that seeing a person or an object would be helpful for learning to occur.

How to activate:

- Click the video icon and note that it changes to green when it is sending a live feed.
- Press the video icon again to turn off your camera.
- Click the options button in the top right to make changes to the picture.

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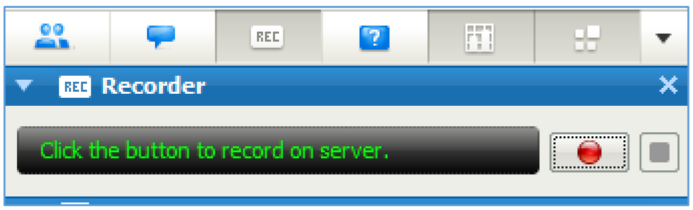
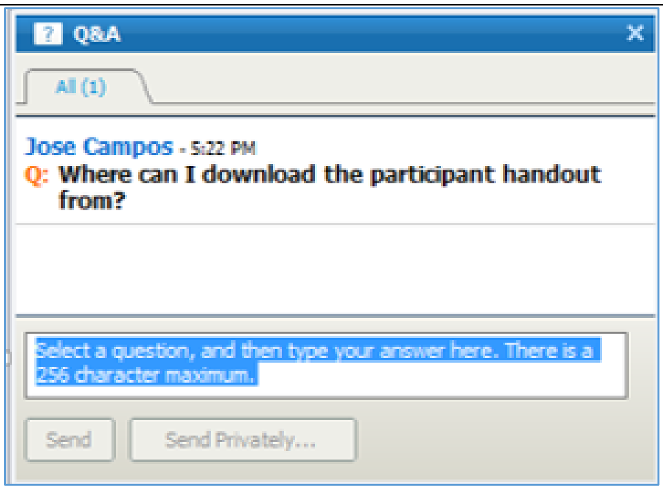
	**Note:** Pay attention to your lighting and what is behind you that will appear on camera. Be sure your face is centered and look into the camera when speaking. **TIP:** Prepare participants ahead of time before asking them to be on a web cam. No one appreciates the surprise!
Recording  	**When to use**: Make recordings of your learning events to provide attendees with an archive of the activities for reference and review. It's also helpful for people who arrive late, or leave a session early. By watching the recording, they do not lose out on any of the session discussion or activities. **How to activate:** • Click the REC panel to open the Recorder. • Press the red button to record. • Click Pause and Stop as needed. • To access the recording link, login as the host to your list of sessions in My WebEx > My Training Sessions and locate the recording. **Note:** WebEx Hosts must mark a recording "public" in order for the URL to be accessible for viewing. **TIP:** Recordings of interactive online training are not a replacement for that learning event. Avoid thinking that a recording will impact learning in the same way it did for those who attended live. It does not replicate the live interaction. Most people do not watch a recording for more than 10 minutes.
Q&A	**When to use**: The Q&A Panel is used for controlling the questions the audience views. Use this feature for large online events where there is a group of people helping to answer questions. Webinars for marketing and sales, or large online organizational events where publicly shared questions would not be appropriate. **How to activate:** • Click the Q&A panel to open it and view the questions.

 **TIP:** Use the chat instead of this panel to create an open dialogue and a more interactive learning event. Use the Q&A when the environment needs to be more "private" or controlled.	• Attendees do the same and type questions in. They do not see other attendee's questions until answered by a member of the panel. • A panel member needs to select the question, decide whether to answer it publicly or to "send privately..." and then type an answer. • Click Send to share the answer. • File > Save > Q&A to save a record. **Note:** Attendees often get confused when they do not see other attendee questions. Be prepared to explain that!