WebEx: Tips for a Better Experience

First time hosting or joining a WebEx Meeting or WebEx Event:

- If you have not hosted a WebEx Meeting or Event before, it is highly recommended that you schedule a couple of practice session with coworkers to get a feel for how to use the application.
- Review all the WebEx related training resources in Confluence here.
- Watch an instructional video that covers WebEx and MS Team here.

> ⊘ Due to circumstances resulting from COVID-19 (coronavirus disease) a historic number of employees are rapidly transitioning to remote work. Webex meetings have never been more vital for staying connected. This is also putting a tremendous strain on regional internet service providers and telephony providers which may result in telephony incidents or service degradation at certain peak times.

Tips for Hosts:

- **Let participants join earlier**
  Set the Meeting or Event preferences so participants can join 15 minutes prior. When participants can join earlier, there is more time to triage and remediate any technical issues such as non-working microphones or cameras.

> ⚠ This setting cannot be changed once a Meeting or Event is scheduled. If you change this setting for one Meeting or Event, the option you set it to will become the default for each subsequent Meeting or Event you schedule unless you change it.

1. Begin the process to schedule a WebEx Meeting.
2. Expand the **Show Advanced** options.

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3. Then, expand the **Scheduling** options.

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4. Scroll down to the **Join Before Host** section, check the box to ensure the control is active, then use the drop-down to select how many minutes before the meeting participants are able to join.

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1. Begin the process to schedule a WebEx Event.
2. Check the box in the **Date & Time** section and use the drop-down to select how many minutes before the even participants are able to join.

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- **Be flexible with when you start or schedule Meetings or Events**
  Most meetings and events start on the hour potentially straining the WebEx servers and reducing the audio and visual experience. Try starting meetings or events on the half or quarter hour instead.

- **Separate the Host and Facilitator function**
  If possible, log into WebEx to host your meeting or event on one device while you present on another. One screen should be used to manage the participant list such as muting participants who fail to mute their line or put the call on hold and the other screen to display presented content. This keeps the function separated and easier to manage.
  Or have a supporting resource on the call to act as the host. That way, one person can facilitate while the other manages the participants.

- **Minimize Background Noise**
  Background noise from participants who have not muted their lines can be identified by monitoring the participant list for small, curved blue lines.

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  Hosts can mute these participants themselves by moving their cursor over the participant and clicking the mute icon.

- **Include an agenda**
  While this is always a valuable practice, it is even more important for remote meetings to keep participants focused on the context of the call. Feel free to leverage NYSERDA's Meeting Agenda template.

- **Perform Check-Ins and Check-Outs**
  Check-Ins prepare the participants for what will be covered in the meeting and encourage limited distractions and active participation. Check-Outs recap what was covered and validate next steps and/or follow-ups for any items a participant owns.

- **Keep Participants Engaged**
  Whenever possible, give each participant time to speak and encourage discussions by asking open-ended questions, asking for feedback, or calling on random participants to get their opinion. It may also help to delegate some responsibilities of the meeting to participants, such as reading the agenda or facilitating the Q&A.

Tips for Participants:

- **Use WebEx Meetings outside of your VMware for the best experience**
  Accessing a meeting or event over VMware may prevent you from using your computer's microphone or camera. Instead, access WebEx from your browser by navigating to WebEx.com.

- **Check your WebEx settings when accessing the meeting**
  There are audio and video settings that can be adjusted when accessing a WebEx meeting. Be sure these settings are correctly set up prior to clicking the **Join** button otherwise you may experience an echo. Echoes are caused when WebEx recognizes two distinct audio inputs such as when a host or participant calls into a WebEx meeting but has not changed the default settings to **not** use the computer audio.

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  Echoes are disruptive for everyone on the call. It is best practice to ensure your settings are correctly set up before joining a meeting. Headphones can also be used to prevent echoes.

- **Access the Meeting before calling in**
  When using a phone to dial into the meeting, make sure you log into the meeting first on your computer and adjust the audio setting to **Call In**. When you change this setting, WebEx will provide you with the call in information including an **Attendee ID**. If you do not input this attendee ID when calling in, you will show up twice on the participant list, once as a **Call In User** and another as a logged in user, making hard for the host or other participants to know who the call in user is. When you input the attendee ID as part of your dial in, WebEx is able to pair your log in with your call in as one entry on the participant list.

- **Dial-In over Phone vs. Computer Audio**
  If you have strong internet, you will have a better experience using the computer audio. However, if your internet is spotty, you will have a better experience dialing in over phone.

- **Use alternate WebEx call in lines**
  If the main audio line for WebEx is busy or has difficulty connecting, try using one of the alternate lines.

- **Download and use the WebEx application**
  If your computer is older or has a hard time running WebEx, you can download and install the app on your phone or tablet for iOS or Android.

- **Join meetings or events from a location with minimal distractions**

- **Keep your line on mute unless you are speaking or asking a question**
  Done speaking? Don't forget to place your line on mute again.

- **Introduce Yourself**
  You should introduce yourself when speaking for the first time in a meeting or event or if the other participants are unfamiliar to you.

- **Don't place the call on hold**
  If you are dialing into the meeting via a phone line, do not place the call on hold. Putting the call on hold forces everyone else on the call to hear hold music which is distracting and can potentially derail the meeting.
- **Stay focused on the meeting**
  You may miss important information if you step away from the meeting or put in in the background to work on other items.

Virtual Meeting Security

We realize that many NYSERDA staff are getting requests from external parties to attend virtual meetings on many different platforms, including WebEx, Zoom, GoToMeeting, Microsoft Teams and others. Here are some tips from **NYSERDA Data Governance and Information Security**:

NYSERDA employees can attend a webinar, virtual meeting, or conference call using a third-party application, as long as Confidential information is protected.

1. Do NOT transfer files in the meeting application
2. Do NOT present confidential materials
3. Be mindful of recordings that may be taking place
4. Do NOT share confidential information in Chat or Q&A. Public information may be shared

Many third-party virtual meeting applications fail to incorporate end-to-end encryption to protect data and do not locate their servers in the US (per New York State security requirements, all NYSERDA data must be stored in the Continental United States). In addition, they may sell user data for profit, and track user activity.

Please keep confidential information secure when attending a third-party virtual meeting.

To initiate a virtual meeting to conduct NYSERDA business, please use WebEx. Info on WebEx is located at Working Remotely