

Draft notes based on feedback from working sessions at DESY in May 07 (Carwardine)

For those setting up a Webex meeting...

1. Webex is most responsive when presentation materials are loaded and shared through the WebEx panel instead of via shared application or (worse) via a shared desktop. Loading files works seamlessly with Word and Powerpoint files, but is problematic when using PDF files, which often come up rotated in the Webex window even when they are correctly oriented in PDF viewers. Instructions for creating PDFs that load correctly oriented in Webex are as follows
 - [instructions for creating pdf files that correctly orientate in webex....]
2. Set up WebEx to allow participants to access all presentations and view all slides. [menu navigation]. This seems to provide the best response to slide changes and scrolling.

For those leading a webex meeting...

1. Post slides in advance so attendees have downloadable copies of the presentations ahead of the meeting, and certainly ahead of the material being presented. If necessary, do this in real time. The preferred location for posting agendas and slides is the ilcagenda server.
 - If slides can not be posted in advance, then do so on-the-fly, and certainly before the presentation begins. While WebEx is tempting for live presentation and tends to lead one into believing that the posting of slides is not important. The real value of live presentation, whether it is the slides, or grainy pictures of peoples faces, is not in the detail (e.g. the slide content) but in the cues. Which slides are important, which caused discussion, who's falling asleep, etc.
 - Posting will also allow people to print out slides, or save them, or refer to them the next day, etc.
 - Note: don't "upload to WebEx" unless there is no other recourse. WebEx supports precisely this issue, of serving the real content, with persistence, while using the meeting for the visual cues. However, WebEx does not retain the original file format, saving files in an internal proprietary format that can only be viewed while you are in a meeting.
2. If anyone calls in directly instead of using the webex call-back feature, change the name on the webex attendee panel from 'Call-in user...' to their actual name. This can be done by ...[instructions]
3. The biggest meeting distraction is background noise. Encourage attendees to mute their phones via webex. You can also mute people via the webex panel.
4. Mute your own line when a remote participant is presenting or speaking.
5. Make sure that remote participants have access to the slides before the meeting.
6. The 'local' site should adopt a 'remote site' attitude.
7. Actively seek opportunities for participants at remote locations to interact with the group, eg by asking direct questions of specific individuals. This is particularly important when the meeting comprises a larger group and several individual participants who might have connected to the meeting from home. Under such circumstances, it is all too easy for the larger group to become the focus of the meeting and effectively locking out remote attendees from participation.
8. Assign someone else at your location as the meeting 'Host' to control and monitor the webex session to ensure that slide transitions are going through responsively and are not lagging behind the presenter, and to monitor and interact with the Chat window as might be appropriate.
9. Test all microphones at the start of the meeting. Check that people at remote locations can hear clearly.
10. Be particularly conscious of behaviors that make it more difficult for attendees whose first language is not English (assuming the meeting is being conducted in English). Examples would include: people speaking rapidly or without clear diction, and use of acronyms, colloquialisms, or language that does not have international meaning.
11. Unless the meeting is intended to be 'lecture only' (no interaction from other participants), do a roll-call at the beginning of the meeting. By having people report their attendance, it introduces their voices to the group and checks the vocal connection. It also allows identification of any 'call-in users,' so their names can be added to the webex attendee panel.
12. Manage the audio channel as 'half-duplex,' ie if one person is talking, others should wait until he/she is finished. Only the meeting host should be allowed to interrupt the person speaking, and only in order to manage the meeting effectively.
13. If you ask a question of a muted person, you might say "John, I see you are muted; what do you think about..." These few extra seconds will allow time for John (or others) to go through what may be multiple steps to unmute, and get ready to respond.
14. Encourage people to use the chat panel to contact the host. This of course requires that the meeting leader has someone in the room that is monitoring and interacting with the chat panel.
15. Encourage (and if necessary train) presenters to make frequent use of the webex pointers to provide cues to those at remote sites.

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For those attending a webex meeting...

1. If at all possible, use the webex dial-back feature instead of dialing directly into the meeting so your name shows up on the webex attendee panel.
2. WebEx has a self-mute capability. Muted participants show up with a red "x" in front of their telephone graphic on the Participants panel.
3. Use a speakerphone instead of handset.
4. Background and extraneous noises are much more distracting to participants at remote locations than to those in the room when the sounds are coming from. Use the following guidelines to avoid causing distractions to other participants
 - Mute your line unless you are speaking or are preparing to speak. This can be done through the Webex panel or by touching #6 on your handset (#6 also unmutes)
 - Call in to the meeting from a quiet place, avoid making background noise or holding side conversations unless your line is muted.
 - Keep noise generators away from microphones (sounds from rustling papers, typing on computer keyboards, putting down coffee cups, etc are all very easily picked up)
5. Regular teleconference attendees are encouraged to get a phone that has a speakerphone function.
6. Avoid calling from a cellphone, since they tend to cause background noise for others and inconsistent voice quality (making it harder for people to hear what you are saying).
7. Speak more slowly and distinctly than you would for normal conversation. Quite low tones are more difficult for people to understand.
8. Always speak in the direction of the microphone.

For those presenting slides...

1. The computer's mouse does not show up on remote screens when presenting through webex. Instead, use the webex pointer tool. Do not make rapid or frequent motions with the pointer.
 2. Allow slides to show up on remote participants' screens before talking.
 3. Announce the slide number when moving to a different slide. Wait for Webex to catch up with the slide change before talking.
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