Webex Meetings
Remote Access Guide

This guide provides an introduction to the Cisco Webex Meetings tool and describes how to access and install the Webex Meetings tool.

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What is Webex Meetings
Webex Meetings is teleconferencing software published by Cisco. It can be used to set up or run online meetings, similar to other teleconferencing products such as Skype, GoToMeeting, G Suite, etc.

Who should use this guide
Use this guide if you:

1. Have a TriMet network account
2. Need to attend or run online teleconference meetings for your work at TriMet
3. Have one of the following for connecting to Webex Teams:
   - A TriMet-issued laptop
   - A TriMet mobile phone
   - A personal computer (laptop or desktop)
   - A personal mobile phone

NOTE: You do not need additional remote access permissions to access Webex Meetings

What is the difference between Webex Teams and Webex Meetings
Webex Teams has a broader set of features that includes instant messaging, file sharing, and team collaboration as well as audio and video teleconferencing. Webex Meetings handles audio and video teleconferences only, but provides more features and options in that context.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Webex Meetings</th>
<th>Webex Teams</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communication</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online status &amp; status updates</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Instant messaging</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Notifications</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Discussions</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>User directory</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td><strong>Meetings</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audio calls</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Video conferencing</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Scheduling</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Meeting initiation and joining</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Muting</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Recording</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Screenshare</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>In-meeting administration</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------------------</td>
<td>-----</td>
<td>----</td>
</tr>
<tr>
<td>Host control of meeting (choose presenter, mute participants, lock meeting, expel participants, etc.)</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>Presenter role (anyone can share screen at any time in Teams)</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>Advanced content annotation features</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>Request to control a shared screen</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

**System and user requirements**

You must have a TriMet network account and a computer that runs Windows 7 or later or Mac OS X 10.13 or later. Alternatively, certain mobile devices, such as tablets and smartphones, can use the Webex Meetings Mobile App.

For more about Windows and Mac system requirements, see [Webex Meetings Suite System Requirements](#) on the Cisco website. For more about Cisco Webex Meetings Mobile App system requirements, see [Support for the Cisco Webex Meetings Mobile App](#) on the Cisco website.

**How to access Webex Meetings**

Because you have a TriMet network account, you are authorized to install and use Cisco Webex Meetings. You do not need to file an IT service request to gain access.

**How to install Webex Meetings**

There are two ways to install Webex Meetings:

- **If you have a TriMet-issued laptop, desktop or mobile device:** You must be connected to the TriMet network to install Webex Meetings from Software Center.
- **If you have a personal computer (laptop or desktop) or a personal mobile device:** Install Webex Meetings from the Cisco website.

**Install Webex Meetings on a TriMet device**

**IMPORTANT:** If you are using a TriMet-issued laptop remotely, you must connect to the TriMet network by VPN to install Webex from Software Center. Otherwise, installation will be blocked by TriMet IT settings.
1. On the Start menu, type Software Center, and then click the Software Center icon.

2. In Software Center, make sure you have Webex Meetings Desktop App installed. Installed software does not have a gray square behind its icon.

3. If it does have a gray square behind its icon (as shown above), click the icon and then click the Install button.

Install Webex Meetings on a personal device
1. Open the Cisco Webex Download page.
2. Click the Webex Meetings download option suitable for your personal computer or device.

How to log in to Webex Meetings

IMPORTANT: Webex Meetings does not support the Virtual Desktop Infrastructure (VDI) remote access solution. Therefore, do not run or join Webex meetings within VDI. If you do, you will have severe audio and video problems.

You can log in to Webex Meetings two ways:
- Strongly recommended: Run Webex Meetings directly on your computer (laptop or desktop) or mobile device, regardless of whether it is TriMet-issued or your personal device.
- On the web, log in at https://tmshare.webex.com. You can launch a meeting from that portal and adjust your meeting settings.

**Common tasks in Webex Meetings**

Here are a few of the common thing you can do in Webex Meetings:

- Schedule a Webex meeting
- Change settings for your scheduled Webex meeting
- Start a Webex meeting immediately
- Run a Webex meeting
- Attend a Webex meeting

**Schedule a Webex meeting**

There are multiple ways to set up and run meetings. Use this method to schedule a meeting in advance.

1. If it is not already running, from your Start Menu, open Cisco Webex Meetings.
2. Click the Schedule button.

3. A blank meeting request opens in Outlook.
   **IMPORTANT:** If you see Webex controls on the Meeting tab in the blank Outlook meeting request, skip to step 5.

4. If you do not see Webex controls on the Meeting tab, as shown in the previous step, in the Location field, type @webex.

5. Placeholder text might appear in the body of your meeting request before you send it. Do not edit that placeholder text.
   -- Do not delete or change any of the following text. --
   A Webex meeting has been added. Meeting details will replace this section after you save or send this invitation.

6. Complete the other fields (attendees, time and date, etc.) in your Outlook meeting request, and then click Send.

After you send the meeting request, it includes a link to your meeting for attendees to use. Do not edit that link.
**NOTE:** Webex Teams will display your meeting at the top of your **Spaces** list a few minutes before the scheduled start time. For more about Webex Teams, see the Webex Teams remote access guide at [https://trinet.trinet.org/portals/employee/#remote](https://trinet.trinet.org/portals/employee/#remote).

**Change settings for your scheduled Webex meeting**

**NOTE:** You can change settings for your meeting before you first send the request or at any time before the meeting starts.

1. In Outlook, open your Webex meeting request.
2. On the **Meeting** tab, click **Change Settings** to make adjustments to meeting settings.

![Webex Meeting Settings](image)

**Important settings are:**

1. **Meeting Password** (mandatory)
2. **Attendees can join meeting** *nn minutes before starting time*
3. **Alternate host** (on the **Resources** tab). Use this setting to allow an attendee to start the meeting on your behalf if you aren’t available

**Start a Webex meeting immediately**

Use this method to start a meeting immediately, rather than scheduling it in advance.

1. In Cisco Webex Meetings, click the **Start a Meeting** button.
2. A meeting dialog box will open. Do not click **Start Meeting** yet.

3. Make sure to select your audio and video settings first -- before you click **Start Meeting**. Here are your audio options.

   **Audio connection**

   - **Use computer audio**
   - **Call me** to enter a phone number
   - **Call in**
   - **Don’t connect to audio**

   **NOTES:**

   - If you select **Call me**, make sure to include hyphens in the telephone number. For example, **503-555-5555**.
   - If you select **Call In**, Webex will provide the number to call, access code and attendee ID after you click **Start Meeting**.

   **Call in from another application**

   1. **Call**
      - US Toll: +1-415-655-0001
      - Show all global call-in numbers
   2. **Enter**
      - Access code: 929 408 160 #
      - Attendee ID: 15 #

   For more information, see [Choose Your Audio and Video Settings Before You Join a Meeting](#) on the Cisco website.

4. After you set your video and audio options, click **Start Meeting**.

5. In the next section, [Run a Webex meeting](#), skip ahead to step 6.
Run a Webex meeting
Whether you schedule a meeting in advance or start a meeting immediately, the connection method and controls you have after joining the meeting are very similar.

1. Open Cisco Webex Meetings on your local desktop. This ensures that you are logged in to your Webex account.
2. For a scheduled meeting, in Cisco Webex Meetings, in the Upcoming Meetings list, find the meeting you want, and then click the Start button.

   3:30 PM  Example meeting
   4:00 PM  
   ![Start button]

3. A meeting dialog box will open. Do not click Start Meeting yet.

4. Make sure to select your audio and video settings first—before you click Start Meeting. Here are your audio options.

   ![Audio and video options]

   Audio connection
   - Use computer audio
   - Call me
   - Phone number
   - Call in
   - Don't connect to audio

NOTES:
- If you select Call me, make sure to include hyphens in the telephone number. For example, **503-555-5555**.
- If you select Call In, Webex will provide the number to call, access code and attendee ID after you click Start Meeting.

For more information, see Choose Your Audio and Video Settings Before You Join a Meeting on the Cisco website.
5. After you set your video and audio options, click **Start Meeting**.

6. For immediate (unscheduled) meetings only: Invite your attendees now. Click the **Ellipsis** button, and then click **Invite and remind** to add the names or emails of the attendees you want.

7. Use the following set of buttons to control the meeting, described in the table below from left to right.
<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📈 Unmute</td>
<td>Audio</td>
<td>Toggle to mute or unmute your microphone. If the icon is red, you are muted.</td>
</tr>
<tr>
<td>📹 Start video</td>
<td>Video</td>
<td>Toggle to share or not share video of yourself. If the icon is red, you are not sharing video. If the button is greyed out, no video cameras available.</td>
</tr>
<tr>
<td>🔍 Share</td>
<td>Share content</td>
<td>Display your desktop or select individual programs to display, including whiteboard</td>
</tr>
<tr>
<td>📻 Record</td>
<td>Record</td>
<td>Start a recording of your meeting, saved either in the cloud or on your computer</td>
</tr>
<tr>
<td>✗ Close meeting</td>
<td>Close meeting</td>
<td>Click the big red X to close the meeting</td>
</tr>
<tr>
<td>🤔 Ellipsis</td>
<td>Ellipsis</td>
<td>The Ellipsis button contains several functions as shown in step 6 above</td>
</tr>
<tr>
<td>⚑ Participants</td>
<td>Attendees</td>
<td>Toggle to display attendees in a list</td>
</tr>
<tr>
<td>📝 Chat</td>
<td>Text</td>
<td>Toggle to display text messages in a scrolling list</td>
</tr>
</tbody>
</table>

**Set a breakout session**

Breakout sessions are a new feature in Webex Meetings as of September 2020. As the leader of a meeting, you can divide your current meeting into smaller subgroups, for example, to perform a training exercise or to brainstorm on ideas.

**NOTE:** Only a meeting leader can start a breakout session. Attendees cannot start one on their own.
1. During your meeting, click **Breakout**, and then click **Enable Breakout Session**.

2. Click the **Breakout sessions** button.

3. In the **Breakout session assignments** dialog box, specify the attendees you want in each breakout session, and then click **Create Assignments**.

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**Attend a Webex meeting**

If you are attending a meeting scheduled or requested by someone else, use Webex Teams instead of Webex Meetings. Webex Teams will display your Webex meeting invitations at the top of your **Spaces** list a few minutes before the scheduled start time.

For more information, see the Webex Teams guide on the TriMet Employee Remote Work portal at [https://trinet.trimet.org/portals/employee/](https://trinet.trimet.org/portals/employee/).

**Best practices for Webex**

Use these tips to get the most out of your Webex experience, whether using Webex Teams or Webex Meetings.

- **Do not run or join Webex meetings within VDI**

  Webex Meetings does not support the Virtual Desktop Infrastructure (VDI) remote access solution. If you run or join Webex meetings within VDI, you will have severe audio and video problems.

- Use Webex Meetings to set up and run meetings; use Webex Teams for everything else
Webex Teams is more widely used inside TriMet and provides real-time text and team collaboration functions. For simplicity, use Webex Teams instead of Webex Meetings for everything except setting up and running Webex meetings.

- Run Webex on your local desktop, instead of on Okta, VDI, or your remote desktop

It is strongly recommended that you run Webex Meetings and Webex Teams locally on the computer or device you are using, instead of:

- In your web browser via the Okta web portal
- Within the VDI remote access solution
- Remotely on your TriMet-issued desktop workstation located at a TriMet facility while you are offsite (by VPN or VDI)

That’s due to three reasons: Better performance, more features, and fewer issues (such as audio issues when joining meetings).

- Use your webcam only when necessary

Network bandwidth is at a premium. Video streaming consumes a lot of bandwidth. Therefore, avoid using your webcam during meetings unless necessary.

**NOTE:** This best practice does not apply to sharing your desktop during Webex meetings. TriMet IT does not recommend any limitation there.

- During peak usage, schedule meetings at off-set times

Like other video conferencing services, Webex is experiencing some overload at peak times due to Coronavirus-related remote work. To reduce overload, Cisco recommends:

- Meeting schedulers set their start time at the 15 or 45 minute intervals of the hour
- Alternatively, that attendees join meetings 10 minutes early

For more tips and best practices, see [Best practices for great online meetings (PDF)](https://www.cisco.com) on the Cisco website.

**Troubleshooting tips**

Here are a few things to watch out for and what to do about them.

<table>
<thead>
<tr>
<th>Issue</th>
<th>What to do</th>
</tr>
</thead>
</table>
| You are having trouble with audio when connecting to a meeting | - Make sure you are running Webex Meeting on your local desktop and not in your Virtual Desktop Infrastructure (VDI) session. That is, do not run Webex on your remote desktop or your virtual desktop.  
- Make sure to select your audio and video settings before you click **Start Meeting**. |
| You selected **Call me** for your audio option, but the phone number fails. | If you select **Call me**, make sure to include hyphens in the telephone number. For example, **503-555-5555**. |
Contact TriMet IT Help Desk
If you are blocked with Webex Meetings access or usage, contact TriMet IT Help Desk.

While connected to the TriMet network
 Open a Webex Services request in IT Service Desk and describe your question or issue

While offline and not connected to the TriMet network
Preferred method: Send email to remoteaccess@trimet.org from your TriMet email (via Outlook Web Access at https://trinet.trimet.org/owa/). A HELPDESK ticket will be created in your name for IT. Be sure to include these details in your email:

 Best callback number
 The PC number of your TriMet desktop computer at the office, if you know it
 Operating system on your home computer
 Overall nature of the issue – what have you tried, any error messages

Screen captures are optional but helpful

Warning: Email sent from your personal email account will not work

Secondary method: Call the IT Help Desk hotline at 503-962-5818. Leave a message and be sure to include your callback number. But email to remoteaccess@trimet.org is better.

For more information
 See Webex Teams on TriNet
 See Webex Meetings Help on the Cisco website for more step-by-step help articles

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