WEBEX EVENT CREATION AND SET UP

- Log into the Webex web interface: https://rutgers.webex.com/
  - Click Webex Events on the lower left of the screen
  - Click Schedule an Event under the Host an Event drop down menu

BASIC INFORMATION

- **Registration** – Depends on your event. SAS event office leaves registration ON to capture attendee list
- **Event Password** – Depends on your event. SAS event office leave password OFF
• **Program** – A program is a series of events that users can register for at once. You can select one from the drop down menu or create a new one by clicking **Add new program**
  o A new window will open up

  ![Create a Program](https://example.com)

  o **Enter the program name**
  o **Password** – If you want your event to be protected by a password, enable this and enter a password. Registrants will be sent that password in their confirmation email, and will have to enter the password when joining the Webex Event.
  o **Registration form** – If using registration, you can customize your questions using the link (**NOTE**: Refer to the [Using Cvent And Webex Events For Registration](#) section below about the SAS event registration process using Cvent)

  ![Customize Registration Form](https://example.com)
- You can select from the Standard Questions list or create custom questions by clicking the **My Registration Questions** button
- Click **Save** when done
  - SAS events does not use the other features, but depending on program/event series you can input/upload as needed
  - Click the **Create Program** button

**DATE & TIME**
- Fill in your event details
- **Note** - Email reminder in this section is for the person creating the event (Host)

**AUDIO CONFERENCE SETTINGS**

**Audio Conference Settings:**
- **Select conference type:** Webex Audio
  - Display global call-in numbers
  - Allow attendees to receive a call back (call-in will still be available)
  - Mute upon entry for all participants
- **Entry & exit tone:** No Tone

- SAS events leaves the default settings

**EVENT DESCRIPTION & OPTIONS**

**Event Description & Options:**
- **Description:**
  - **Upload** a picture about the event description
  - **Host image:** Upload a picture of yourself or the presenter
  - **Event material:** Upload event material for attendees to download before event starts
  - **Other UCF options:** Do not allow attendees to share rich media files in this event
  - Request attendees to verify rich media players
  - Who can view the attendee list: All participants, Only the host, presenter, and panelists
  - **Video:** Turn on video
  - **Post-event survey:** Create post-event survey
  - Do not display survey to attendees
  - Display survey in pop-up window
  - Display survey in main browser window (instead of destination URL)
- **Destination URL after event:** http://

- **Description** – Event description
- **Upload a picture about the event description** – Upload a speaker image, event image, etc.
- **Host image and event material** – SAS events does not use this option but it depends on what type of event it is.
- **Other UCF options** – Leave the default selected (Request attendees to verify rich media players)
- **Who can view the attendee list** – SAS allows all participants to view the attendee list
- **Post event survey** – SAS events does not use this option because we send a Qualtrics survey to registrants, but use this if appropriate for your event
• **Destination URL** – Will bring attendees to a URL page after Webex event concludes (i.e. your department website)

**ATTENDEES & REGISTRATION**

- **Attendees** – SAS does not use option to create invitation list for attendees through Webex, but send an eblast invitation through Marketo to invite alumni and friends. Using this Webex options requires manually inputting attendee names and email addresses
- **Maximum number of registrants** – Keep at default
- **Registration** – You can customize registration questions if using registration through Webex (NOTE: Refer to the Using Cvent And Webex Events For Registration section below about the SAS event registration process using Cvent)
- **Approval** – Auto approve unless manually approving is required for your type of event
- **Registration ID required** – If you want your event to be protected by a registrant ID, enable this. Registrants will be sent their ID in their confirmation email, and will have to enter it when joining the Webex event.
- **Registration Password and Registration ID required** – Enabling both of these will further secure your event, requiring the attendee to input two codes to enter the Webex event. Keep your audience in mind when deciding on this two code process.

**PRESENTERS & PANELISTS**

- **Panelists** – Click Create invitation list
Anyone who needs to be on camera during the Webex event should be added as a panelist

- Full Name
- Email

**NOTE:** For easier access you can add a panelist to your address book if they will be a panelist in other events of yours.

- Click **Add to invitation list**
- Input additional names and emails if needed

**NOTE** – If you have contacts in your address book already:
- Click the **Select Contacts button** at the top of the pop up window
- Check off their name from the contacts list
- Click the **Add Panelist** button to add them to the list

- Once the panelist have been added to invitation list, click **Select all**
- Click the **Invite** button

- **Panelist info** – Can input name, title, etc. of main speaker
- **Panelist Password** – Create a panelist password and confirm it, if you want to use a password for panelists. Using a password further secures your event.
EMAIL MESSAGES

Email Messages:

- **Invitation emails** – Can modify panelist invite here (will not need to use attendee invite unless you are manually inputting names and emails for invited attendees which is not recommended unless attendee list is very small)

- **Registration Emails** – Can unselect pending, leave approved and rejected checked

- **Event updated emails** – Can modify who will receive notification of any updates the creator (host) of the Webex event makes – this could be something to consider removing from panelists unless they need to know that updates were made.

- **Reminder emails** – Can schedule reminders to go out to panelists and attendees

- **Follow up emails** – Can schedule thank you or absentee emails to go out post-event
  - **NOTE:** If you intend to use this program in the future you can click **SAVE AS A TEMPLATE** on the bottom left corner of this screen to save your work and use it in the future to save time. Once this is saved as a template it will be saved under the drop down **Program** box under **Basic Information**. This will save your registration questions.

- Click the **Schedule this event** button, which will take you to the Send Event Emails page

SEND EVENT EMAILS

- **Send Event Emails**

  You have successfully scheduled your event.

  **Send invitation emails to:**

  - Host
  - Panelists
  - Attendees
  - Vendors

  Send Now...  Send Later

- Select Panelists and Attendees

- Click the **Send Now..** button which will include links to send to panelist and attendees (2 separate links) to join the Webex Event. Use the attendee link in your Cvent registration page or include in your invitation if using Webex (and not Cvent) for registration (Refer to the **Using Cvent And Webex Events For Registration** section below about the SAS event registration process using Cvent). This attendee link will take attendees to the registration page and allow them to join the event when it’s time.
Webex Event

Host - Controls who can share screen (presenter), can unmute attendees if needed, can edit controls for event, records event, can turn camera on and off for presenter and panelists, can mute/unmute presenters and panelists.

Presenter – Can share screen, control own mute/unmute, and camera

Panelist – Control own mute/unmute, and camera, can share screen if made a presenter

Attendee – Joins event on mute with camera off. Attendees do not have access to their cameras. Host can unmute an attendee and change their role to presenter or panelist. (NOTE: Once an attendee is unmuted by the host they will have the ability to continue to unmute themselves even if the host re-mutes them.)

- Starting a Webex event
  - Host will have to log into the Webex web interface: https://rutgers.webex.com/
  - Click Webex Events on the lower left of the screen
  - Click Schedule an Event under the Host an Event drop down menu
  - Click Site Events below the Host an Event drop down
    - Click the Start link to the right of the event name
    - Once event is started by the host all panelists will be able to join

- Recording your event
  - Once event is ready to begin, the host can click on red recorder button by hovering over the Webex event screen
  - Select “Record on my computer” rather than Webex cloud because the cloud takes much longer to download compared to downloading to a computer – discuss with team for best option
You will be prompted to select a location to save the video once you click the **Record** button.

- **Q/A and Chat** – Both can be modified
  - The Q/A and Chat sections can be turned on/off. *(NOTE: SAS turns off Q/A and uses chat for questions)*
    - Go to the **Event** drop down > **Options** > Turn off Q/A

  - Chat can be modified so attendees can talk to everyone, host, and presenter only, etc – depends on your event
    - Go to the **Participant** drop down > **Assign Privileges To** > **Attendees**

- Check off boxes as needed
- Click OK when done

- **Controlling attendees** - Host has ability to control attendees
  - The host can click on Participants button by hovering over the Webex event screen
  - Click **View all attendees** in the Participant section
  - A box will open so the host can search attendee names, unmute attendees, make panelist, expel.

- **Controlling Panelists/Presenters**
  - Host can switch between panelists and presenters by right clicking their name > **Change Role To** > switch role OR you can click on little Webex icon (icon is located next to whoever is the presenter) and drag it to the person’s name who should be changed to presenter.
• Presenter can share screen by hovering over Webex Event screen and click on the **Share Content** icon.

![Share Content Icon](image)

• **At conclusion of the event, the host should:**
  
  o Stop the recording

  ![Recording Icon](image)

  o Click the End or leave event icon > **End Event**

  ![End Event Icon](image)

  o Click **End Events** for all participants

  ![End Events Icon](image)

  o From there, a box will appear on the host computer screen notifying them that the recording is downloading to whatever location they have chosen.

    ▪ **NOTE:** Suggested to practice sessions in advance and sign on early to make sure everything is set up and working properly.

    ▪ **NOTE:** Suggest uploading recording to Box or another cloud storage for safety as soon as it is finished downloading (File is saved as a MP4)
Post Event

- It will take some time (often the next day) for the attendee report to appear in Webex
- To view attendee report
  - Login to Webex web interface: https://rutgers.webex.com/
  - Click on My Webex
  - Click My Reports on the left side of the screen
  - Select the event reports needed

**USING CVENT AND WEBEX EVENTS FOR REGISTRATION**

Use the FCC Outlook calendar to obtain an AWA code for your event. This code will allow you to request a CVENT registration page which will track and load registrant information into the Foundation and RUAA database and helps track alumni and friend’s engagement.

To request a CVENT registration page visit: [https://alumni.rutgers.edu/get-involved/clubs-groups/group-resources/planning-and-promoting-events/cvent/](https://alumni.rutgers.edu/get-involved/clubs-groups/group-resources/planning-and-promoting-events/cvent/)

In your CVENT registration confirmation email include the attendee link provided in Webex Events after you schedule your event.

Have Webex Event set to registration required in ADDITION to using CVENT. Having both set will provide registrant tracking through CVENT which will auto-load to the Foundation alumni database and will allow you to view the attendee list through Webex post event. If using CVENT customize your registration questions there (school, year, name, email, any other questions you might want to ask), and in Webex events, only ask for Name and Email – this will be a quick way for registrants to register and join your event on Webex while still allowing the host to capture the attendee names post event.