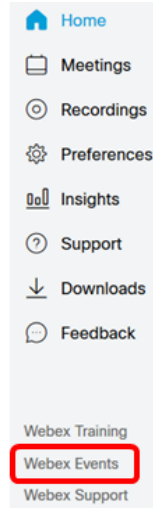


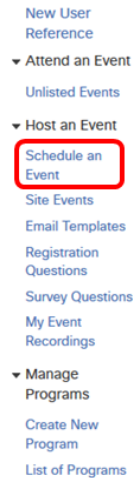
# Webex Events Set Up Guide

## 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

Basic Information:

\* Event type: Event 1000 ▾

\* Event name:  ?

Listed on public calendar ⓘ

Delete from My Meetings when completed

Registration:  Required ⓘ

\* Event password: D7wJPQ6P3Bj ⓘ The password must be at least 4 characters.

Program:  Select a program ▾ [Add a new program](#)

- **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**
  - A new window will open up

Create a Program - Mozilla Firefox

https://rutgers.webex.com/ec3300/eventcenter/program/programAction.do?theAction=event\_create\_program

### Create a Program

Asterisks (\*) indicate required values.

**Program Details**

\* Program name:  ?

Description:  ?

Expected registration:

Budget:

Email:

Program status:  Listed  Unlisted

**Registration**

Registration ID required:  Yes  No

Password required to register:  Yes  (type password)  
 No

Registration form: Click [here](#) to customize your registration form

Invite friends:  Allow registrants to invite friends

Destination URL after registration:  http://

**Customize Program Web Page**

**Images:** These images may be referenced in the custom HTML area on the Program Web page using standard HTML tags (e.g. <img src = "image1.gif">). Ensure to upload all images (up to five). If you need to update the images, upload all images again. Any previously uploaded images are overwritten.

Click **Browse** to select an image on your computer. Image requirements: GIF or JPG format, approximately 75 x 38 pixels, and less than 100 KB.

Image 1:  No file selected.

- Enter the program name
- **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.
- **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 - Mozilla Firefox

https://rutgers.webex.com/svc3300/evcomp/other/regist...theEvent...

### Customize Registration Questions

You can select the questions you want to appear on the registration form. You can also create your own questions and add them to the form.

[Check All](#) | [Uncheck All](#)  Include on Form  Required

**Standard Questions**

<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> First name	<input checked="" type="checkbox"/> <input type="checkbox"/> Address 1
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Last name	<input checked="" type="checkbox"/> <input type="checkbox"/> Address 2
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Email address	<input checked="" type="checkbox"/> <input type="checkbox"/> City
<input checked="" type="checkbox"/> <input type="checkbox"/> Phone number	<input checked="" type="checkbox"/> <input type="checkbox"/> State/province
<input checked="" type="checkbox"/> <input type="checkbox"/> Company	<input checked="" type="checkbox"/> <input type="checkbox"/> ZIP/postal code
<input checked="" type="checkbox"/> <input type="checkbox"/> Title	<input checked="" type="checkbox"/> <input type="checkbox"/> Country/region
<input checked="" type="checkbox"/> <input type="checkbox"/> Number of employees	
<input checked="" type="checkbox"/> <input type="checkbox"/> Would you like to receive information about future seminars?	

**My Custom Questions**

- 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:

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:

- 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:

- **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 & Registration:

**Attendees:** [Create invitation list](#)  
[View invitation list](#)

**Invite friends:**  Allow registrants to invite friends to this event

**Maximum number of registrants:**

**Registration form:** Click [here](#) to customize your registration form

**Destination URL after registration:**

**Approval required:**  Yes  No [Set up approval rules](#)

**Registration password:**  Yes, specify password:   
 No


**Registration ID required:**  Yes  No

- **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

Presenters & Panelists:

**Panelists:** [Create invitation list](#)  
[View invitation list](#)

**Panelists info:**  

Allow panelists to upload documents associated with the event.

**Panelist password:**  (recommended)

**Confirm password:**

- **Panelists** – Click **Create invitation list**

## Create Panelist Invitation List

You can select contacts from an existing address book, import a Comma or Tab Delimited file (file contains non-ASCII characters, use a Unicode file delimited either by commas or tabs) or add new contacts. Note that the number of invitation emails cannot exceed 10000.

Select Contacts...

Import Contacts...

### Panelists to Invite

Name	Email address	Phone number	Language	Time Zone	Locale
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No contacts selected.

OK

Cancel

## New Panelist

Full name:  (required)

Email address:  (required)

Phone number:  Country/Region  Number (with area/city code)

Time Zone:

Language:

Locale:

Add new panelist in my address book

Invite as alternate host

Add to 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

### Panelists to Invite

Name	Email address	Phone number	Language	Time Zone	Locale
<input checked="" type="checkbox"/> <a href="#">A Smith</a>	test@email.edu	1-	English	New York Time	U.S.

- **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:

Email format:  Plain Text  HTML  Include iCalendar Attachments

Invitation emails: [Attendees](#) | [Panelists](#)

Registration emails:  Pending  Approved  Rejected | [Event In Progress](#)

Event updated emails: [All Approved Registrants](#) | [All Attendees](#) | [All Panelists](#)

Reminder emails:  [1st Reminder](#)

August 31 2020 9:00 am pm

[2nd Reminder](#)

August 31 2020 9:00 am pm

Follow-up emails:  [Thank You for Attending](#)

August 31 2020 10:00 am pm

[Absentee Follow-Up Email](#)

August 31 2020 10:00 am pm

- **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

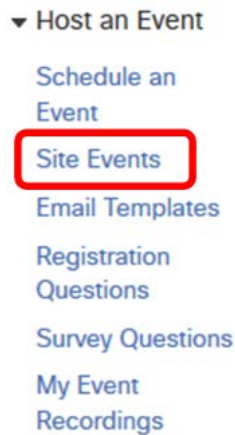
**Presenter** – Can share screen, control own mute/unmute, and camera

**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.)

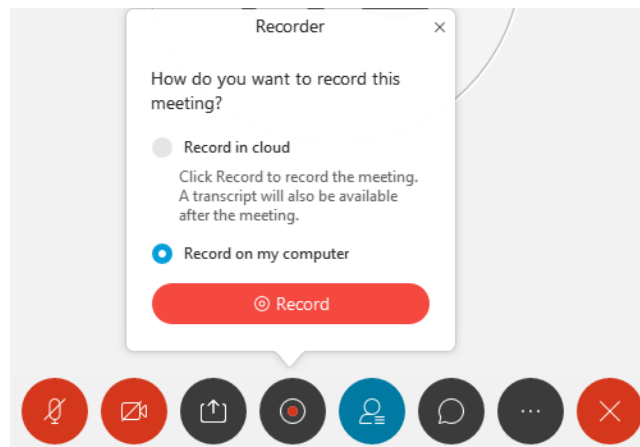
- **Starting a Webex event**

- 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



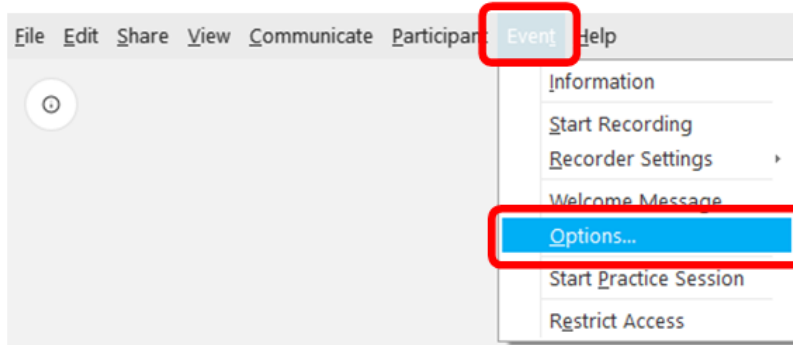
- Click the **Start** link to the right of the event name
- Once event is started by the host all panelists will be able to join

- **Recording your event**

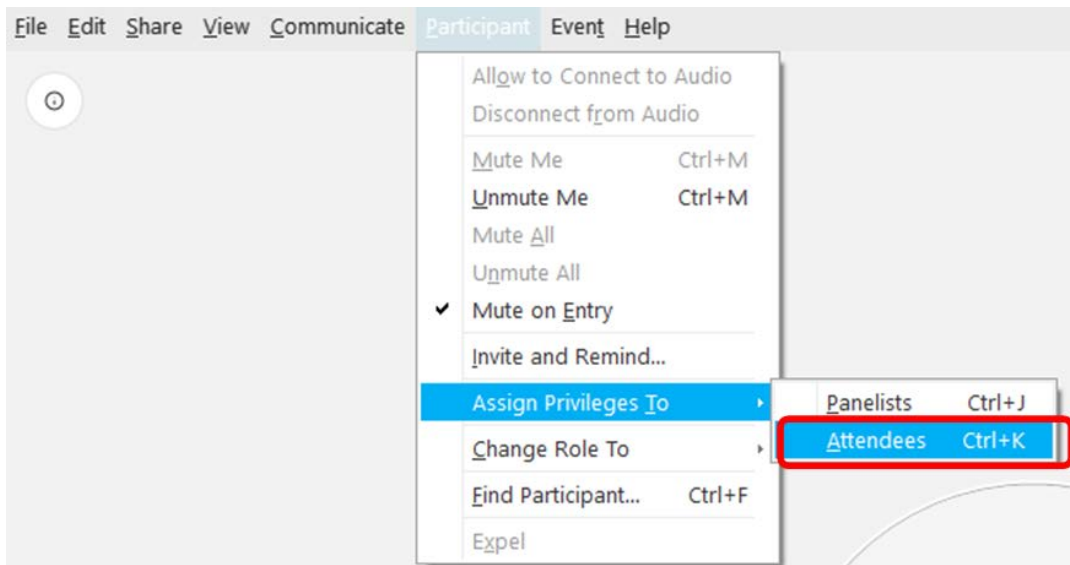


- Once event is ready to begin, the host **can** click on red recorder button by hovering over the Webex event screen
- Select “Record on my computer” rather than Webex cloud because the cloud takes much longer to download compared to downloading to a computer – discuss with team for best option

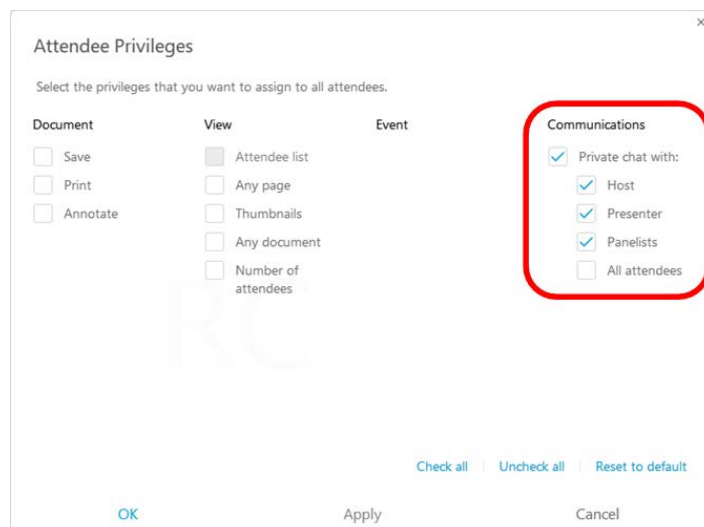
- You will be prompted to select a location to save the video once you click the **Record** button.
- **Q/A and Chat** – Both can be modified
  - The Q/A and Chat sections can be turned on/off. (**NOTE:** SAS turns off Q/A and uses chat for questions)
    - Go to the **Event** drop down > **Options** > 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**

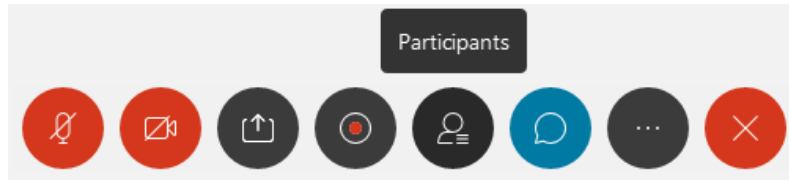


- Check off boxes as needed

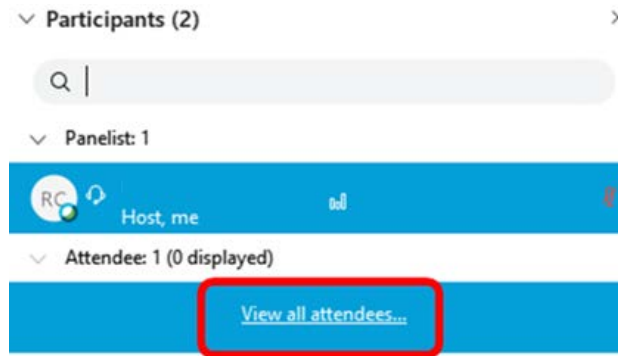




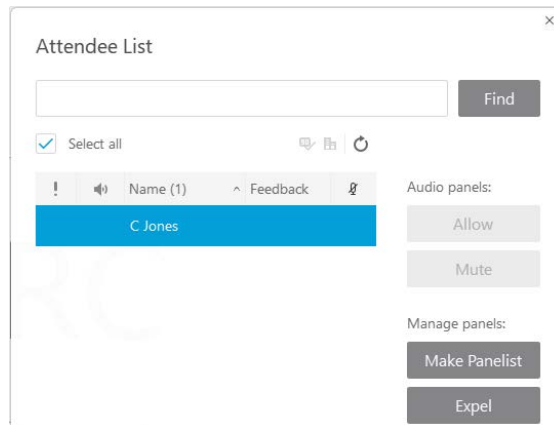
- Click OK when done
- **Controlling attendees** - Host has ability to control attendees
  - The host can click on Participants button by hovering over the Webex event screen




- Click **View all attendees..** in the Participant section

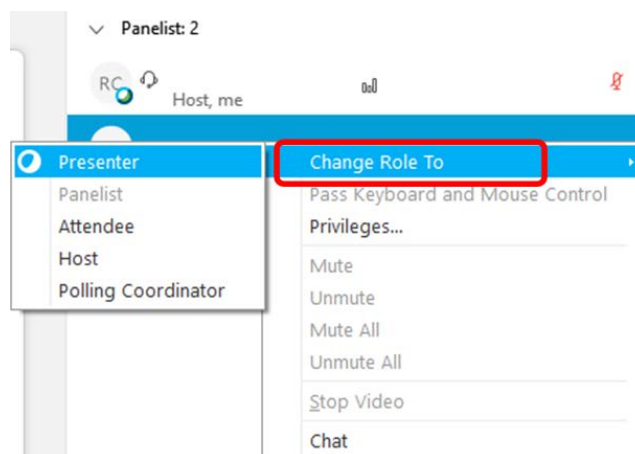


- A box will open so the host can search attendee names, unmute attendees, make panelist, expel.

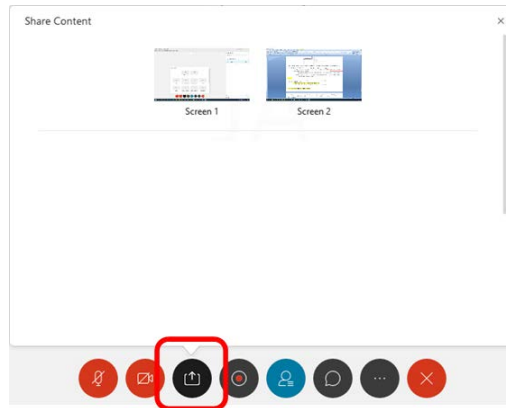


- **Controlling Panelists/Presenters**

- 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.

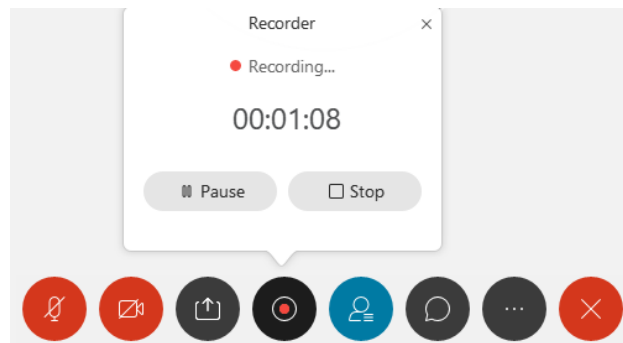


- Presenter can share screen by hovering over Webex Event screen and click on the **Share Content** icon

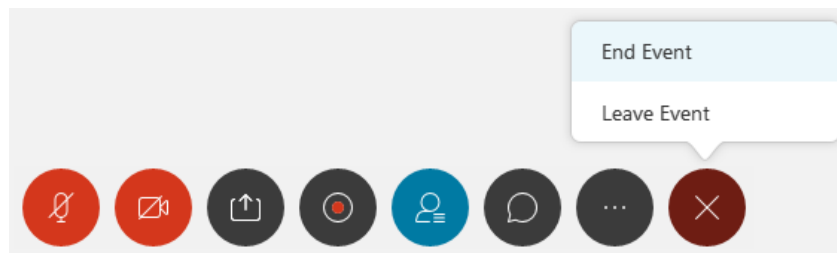


- **At conclusion of the event, the host should:**

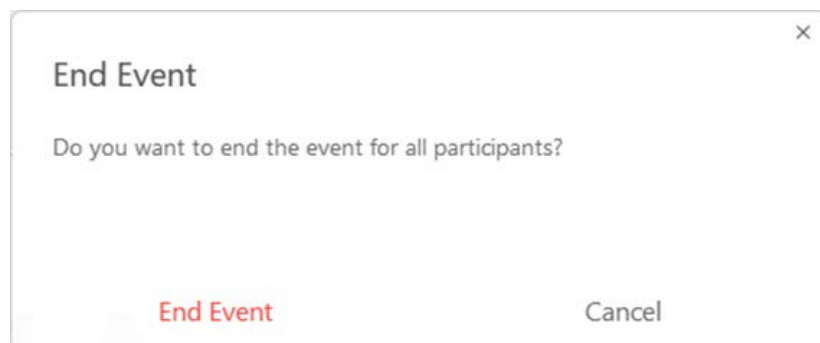
- Stop the recording



- Click the End or leave event icon > End Event



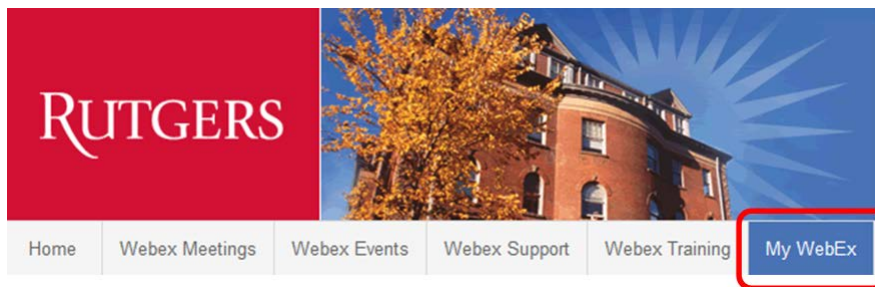
- Click **End Events** for all participants



- 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/>

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.