

# Facilitating Virtual Groups using Webex

## Changing Your Meeting Settings Checklist



Here is a checklist of settings you may want to change for your virtual group session. **Note: the settings will revert back to the defaults each time you launch your Personal Room.**

- Start your virtual group **15 minutes early** to set up in-session settings.
- Lock the meeting** (*note: if you are using a Personal Room, the meeting should automatically be locked*).
  - Click on **Meeting** in the top left of your meeting window or the **More icon** in the call controls bar (ellipses).
  - In the drop-down menu, select **Lock Meeting**. A black lock and key icon will appear in the top right corner of the meeting window indicating that the meeting has been locked.
- Limit sharing abilities**.
  - Click on **Participants** in the top left of your meeting window.
  - In the drop-down menu, un-select **Anyone Can Share**. The option to share will be greyed out for your participants. To allow someone to share, you can **pass them the Presenter role** by right-clicking their name in the Participants menu, selecting Change Role To, and clicking Presenter.
- Limit who your participants can chat to** and how they can chat.
  - Click on **Participants** in the top left of your meeting window.
  - In the drop-down menu, select **Assign Privileges**.
  - Under the **Communicate tab**, you can select who your participants can chat to. If you do not want them chatting amongst themselves privately or publicly, uncheck the **Other Participants** box under **Privately** and **Publicly** options. For the host and facilitator (presenter) to be able to chat privately, keep the **Host** and **Presenter** boxes checked. Then, designate your co-facilitator as the Presenter (right click on them in the Participant menu and assign their role).
  - When you have finished changing your settings, click **Apply** and then OK to close the window.
- For participants joining only by phone, **dial them into the session** (*note: phone only participants cannot access the lobby – you will have to dial them into the session if it is locked*).
  - Click on **Participants** in the top left of your meeting window.
  - In the drop-down menu, select **Invite and Remind**.
  - In the pop-up box, click on the **Phone** tab.
  - Enter the client's name as you would like it displayed and their direct phone number (*note: switch the flag icon to Canada*). The system will dial them into the meeting and all they will need to do is press 1 to be connected.
- Set up your co-facilitator** (if applicable).
  - As the host of the Personal Room, pull up the **Participant List**.
  - Right click on your co-facilitator's name, and select **Change Role To**.
  - In the list that pops up, select **Presenter**. You and your co-facilitator will now have access to more functionality in the session and you will be able to chat privately in the chat box (*note: if you have turned off Anyone Can Share, only the participant with the Presenter role will be able to share content. If at any point you need to switch presenters, follow the same steps to change a participant's role*).