



# How to Connect to a Virtual Panel via WebEx



## **INSTRUCTIONS FOR PANELISTS**

**DIVISION OF INDUSTRIAL INNOVATION  
AND PARTNERSHIPS (IIP)**

# How to Connect to a Virtual Panel

1. Go to the Virtual Panel email invitation with instructions received from NSF.
2. Locate the Virtual Panel link in the middle of the page.
3. Right click on the URL and select "Copy hyperlink"
4. Open your Internet Explorer browser and right-click in the address bar and select "Paste" then hit Enter.

You will navigate to the WebEx login page for the scheduled panel.

*Internet Explorer is the recommended browser for WebEx.*

Dear Reviewer,

Thank you again for agreeing to participate on the upcoming [Panel Name] SBIR/STTR Phase I Virtual Panel scheduled for [Panel Start Date].

The virtual panel will be conducted via WebEx and will start promptly at [Start Time] Eastern Time. The SBIR/STTR Program has made several significant changes to the way that we conduct Virtual Panels. We want this experience to be as simple and rewarding for you as participating on a face-to-face panel at NSF. In order to achieve this goal we are providing some critical information below that you need to review before the scheduled panel date.

**Please join the panel (link provided below) at least 15 minutes prior to the scheduled start time to ensure that you have time to connect to the Webex meeting and trouble-shoot any IT issues. If you encounter any IT issues, immediately call Micaela Terrones at 703-292-2647. If you are unable to reach Micaela, call me directly at [PHONE NUMBER].**

Virtual Panel link:

<https://mmancusa.webex.com/mmancusa/j.php?ED=186855527&UID=1298569257&PW=NNDkwOTVkyZkw&RT=MIMxMQ%3D%3D>

There are three files attached to this email that you will need to participate on this panel:

1. **WebEx Guide:** This PPT includes a simple step-by-step guide to assist you with logging into the WebEx meeting and some key features of the software that you might use during the panel. *Internet Explorer is the recommended browser to use for WebEx.*
2. **Panel Summary Template:** This document will be used by the "Scribe" to create each Panel Summary. Please save it to your desktop for easy access during the panel.
3. **Conflict of Interest Form:** This general COI and non-disclosure agreement is required from every reviewer for each panel on which you participate. **You must sign this form and return to me via email or fax prior to the date of the panel.**

**Keys to successful participation in a Virtual Panel for SBIR/STTR Program at NSF:**

- PC with Microsoft Internet Explorer (IE) browser. Macs are also acceptable.
- NSF discourages the use of mobile phones due to the poor quality of communications (noise, drop calls, unintelligible signals, etc).

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5. In the box on the right side of the WebEx screen, enter your full name and email address, then click on the “Join” button.

The screenshot displays the Cisco WebEx meeting join interface. At the top left is the Cisco WebEx logo, and at the top right is the Cisco logo. Below the logo is a blue header bar with the text "Meeting Information: testing" and a refresh icon. Below the header bar, the meeting details are listed on the left: Meeting status: Started (with a green dot), Starting date: Friday, July 6, 2012, Starting time: 3:30 pm, Eastern Daylight Time (New York, GMT-04:00), Duration: 1 hour, and Host's name: MICHAELA TERRONES. A link for "More Info" is also present. On the right side, there is a "Join" form with the heading "It's time to join!". Below the heading, it says "If you are the host, [start your meeting.](#)". The form includes input fields for "Your name:" and "Email address:", a "(Clear my information)" link, and a blue "Join" button. A red arrow points from the text on the left to the "Join" button. Below the form are two buttons: "View Agenda" and "Add to My Calendar". At the bottom, there is a note: "Before you join the meeting, please [click here](#) to make sure that you have the appropriate players to view UCF (Universal Communications Format) rich media files in the meeting." At the very bottom, it says "POWERED BY Cisco WebEx Technology".

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6. Click on the “Click Here” button in the window that opens (button is bright blue at the bottom of the page).

**To Join the Meeting**

**Either**

- 1 Click the yellow **Information Bar** at the top of the page.
- 2 Choose **Install ActiveX Control...**
- 3 In the security warning dialog box that appears, click **Install**.

**Or**

- 1 [Click Here](#)
- 2 Click **Run** in any dialog box that appears.

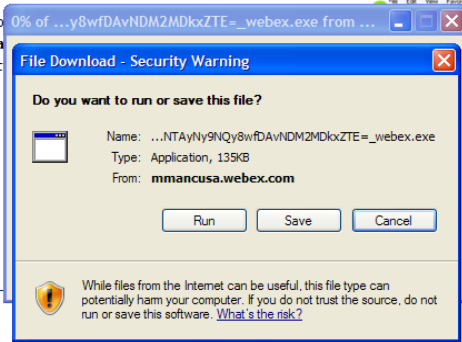
# How to Connect to a Virtual Panel

7. File Download window pops up. Click on the “Run” button.

**To Join the Meeting**

**Either**

1. Click the yellow button
2. Choose **Install**
3. In the security warning dialog box, click **Run**.



**Or**

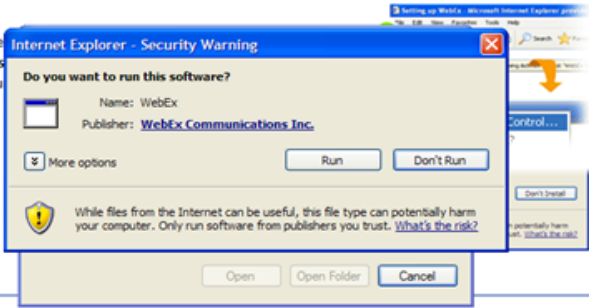
1. [Click Here](#)
2. Click **Run** in any dialog box that appears.

8. Another window pops up. Click on the “Run” button once again.

**To Join the Meeting**

**Either**

1. Click the yellow button
2. Choose **Install**
3. In the security warning dialog box, click **Run**.



**Or**

1. [Click Here](#)
2. Click **Run** in any dialog box that appears.

# How to Connect to a Virtual Panel

9. “Preparing Meeting Center” window pops up, displaying the meeting progress download.

The screenshot shows a web page titled "To Join the Meeting" with the following content:

- Either**
- 1. Click the yellow **Information Bar** at the top of the page.
- 2. Choose **Install ActiveX Control...**
- 3. In the security warning dialog box that appears, click **Install**.

Below the instructions, there are three numbered steps with corresponding images:

1. A yellow information bar at the top of a browser window.
2. An "Install ActiveX Control..." dialog box with the question "What's the Risk?".
3. An "Install" button in a security warning dialog box.

At the bottom of the page, there are two numbered steps:

1. [Click Here](#)
2. Click **Run** in any dialog box that appears.

Overlaid on the left side of the screenshot is a "Preparing Meeting Center" dialog box. It has a blue title bar and a close button. The text inside reads "Time remaining: less than 1 minute" above a progress bar. A "Cancel" button is located at the bottom right of the dialog box.

# How to Connect to a Virtual Panel

10. The WebEx Meeting Center pops up (see picture).

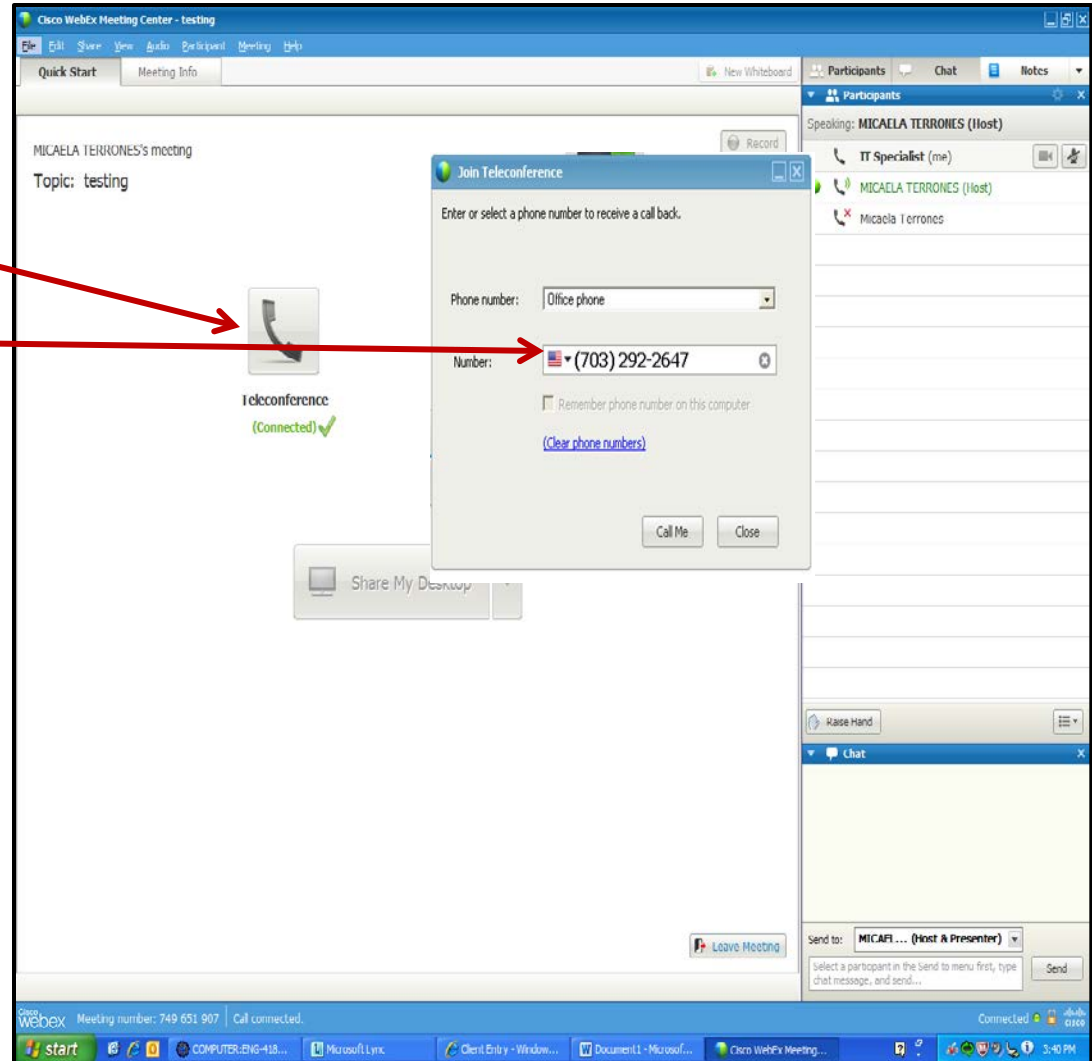
11. If the “Teleconference” pop-up box does not open automatically, click on the Phone Icon.

12. A window pops up for you to enter your phone number. *Cell phones are strongly discouraged.*

13. Once you enter your phone number, click on “Call Me” button.

14. Answer your phone to join the teleconference. *Headsets are recommended for confidentiality reasons.*

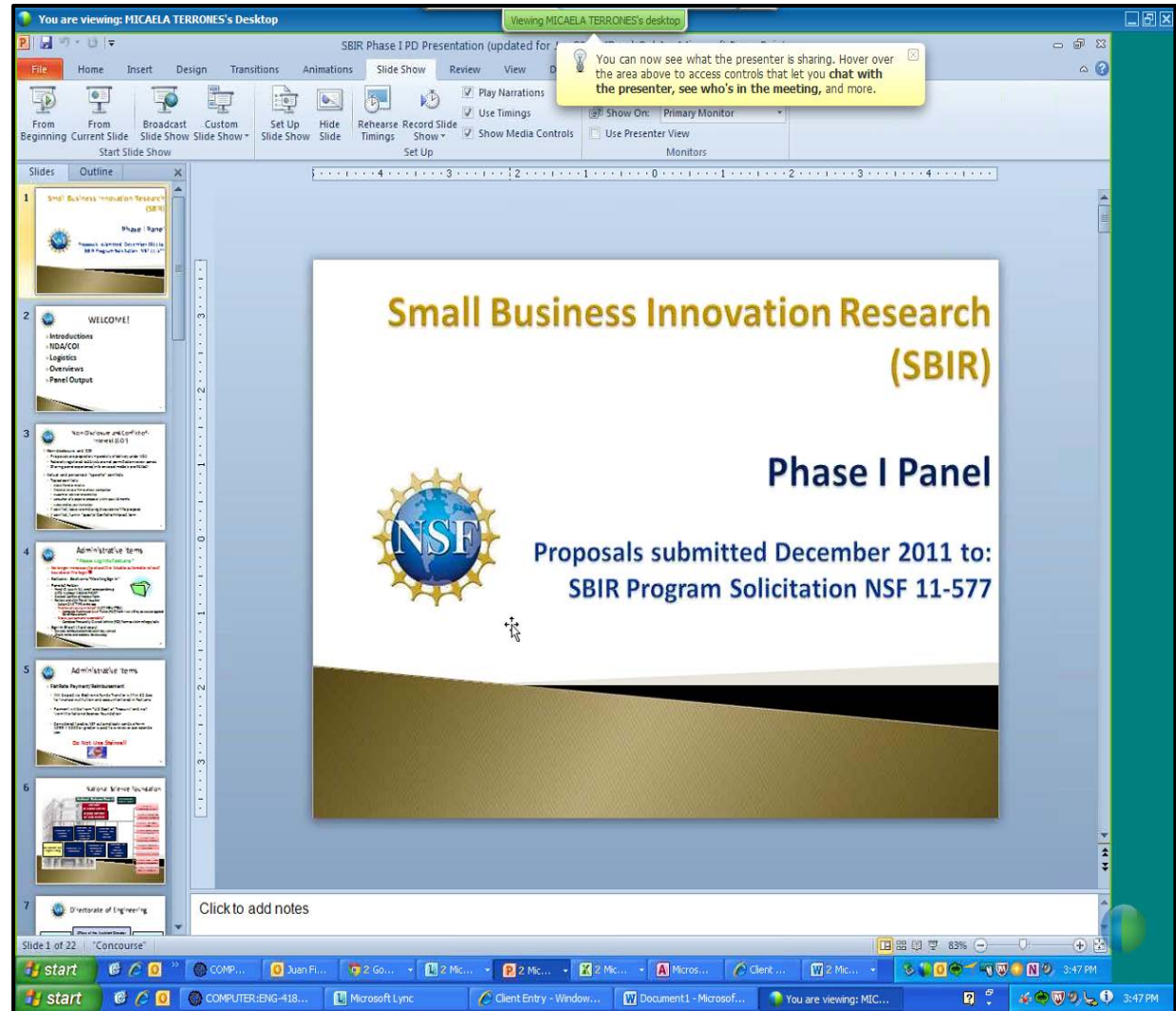
15. Once you are connected to the audio portion, the teleconference icon will show as “Connected” with a green check mark next to it.



# How to Connect to a Virtual Panel

The Program Director is 'sharing' their desktop.

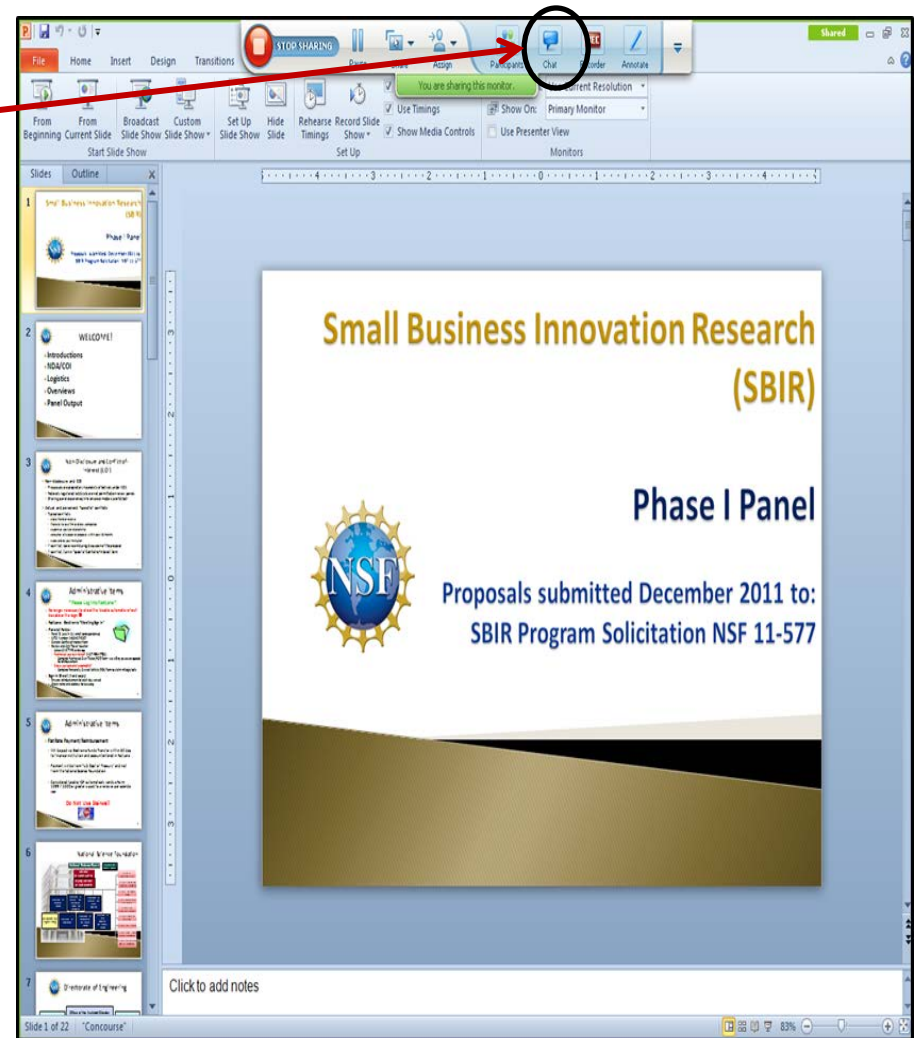
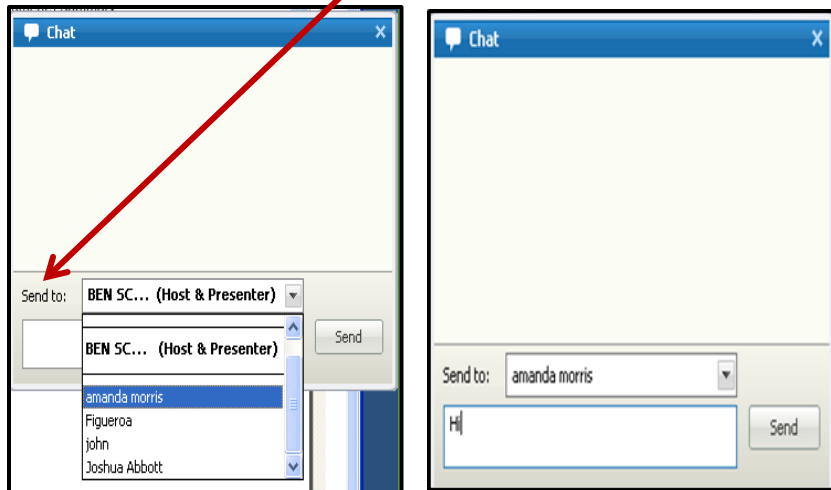
The WebEx toolbar will be at the top of your screen throughout the meeting. There are several important icons on the toolbar that you will use throughout the meeting.





# How to Chat with the Leader\*

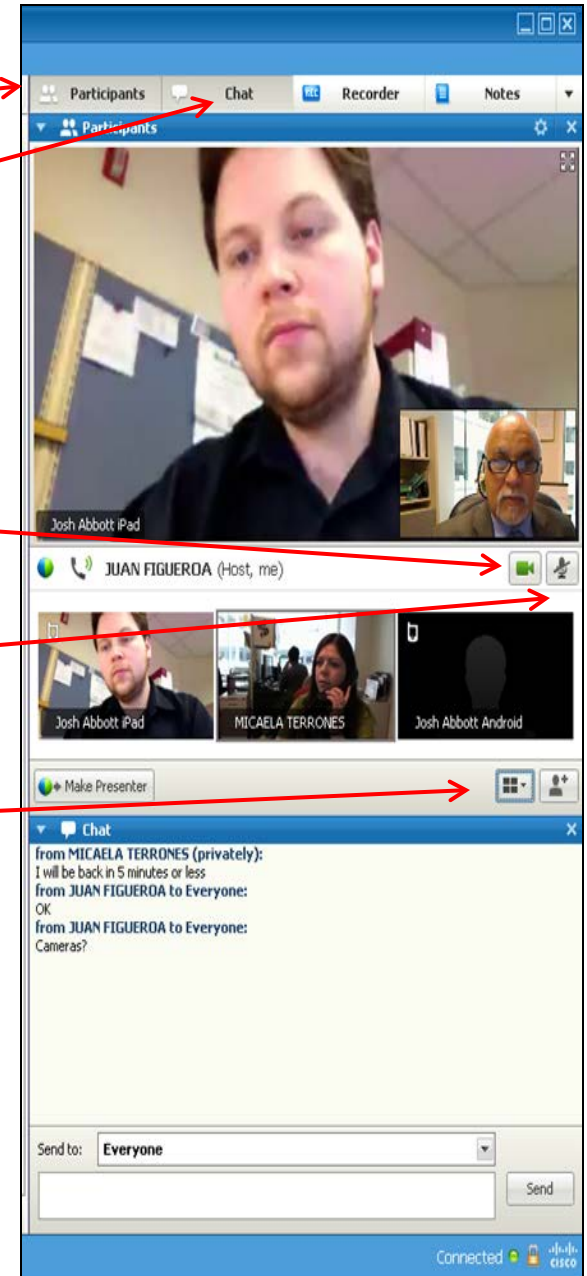
1. At any time during the meeting, you can click on the “Chat” icon on the Meeting Center toolbar.
2. The chat box appears.
3. In the “Send to:” drop-down, select the Program Director’s name and click the “Send” button.



\* NSF does not permit chatting between panelists during a Virtual Panel.

# Handy WebEx Features

1. Click “Participants” to view the online participants.
2. Click “Chat” to open the chat window.
3. The camera button will share your Webcam (highly recommended).
4. The microphone icon will turn Mute on/off for your telephone.
5. Select “Thumbnails” to view all available webcams. (Typically you need to drag the corners of the thumbnail window to view all of the participants.)



# Set Up Your Webcam in WebEx

If your webcam is not recognized automatically:

- ❖ On the Participants tab, click on the “Settings” icon (round circle).
- ❖ The window below will pop up. Select your device and Click “OK”.

The screenshot displays the Cisco WebEx Meeting Center interface. The main window is titled "Cisco WebEx Meeting Center - testing webcam". The "Participants" tab is active, showing a list of participants: "MICAELA TERRONES (Host)", "MICAELA TERRONES (Host, me)", and "angela". A red circle highlights the "Settings" icon (a round circle with a gear) in the top right corner of the Participants list. A red arrow points from this icon to the "Video Options" dialog box. The dialog box is titled "Video Options" and has a "Capture Device:" dropdown menu set to "USB Video Device". Below the dropdown is a video preview window showing a woman's face. To the right of the preview are buttons for "Advanced Options" and "Select Input". At the bottom of the dialog are "OK" and "Cancel" buttons. In the background, the main meeting window shows a "Teleconference (Connected)" status and an "Invite & Remind" button. The bottom status bar indicates "Meeting number: 740 204 065" and "You are participating in this teleconference using your phone."