

CHAPTER 6

Getting Started with Cisco WebEx Meeting Applications

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Modifying Your Provisioned Cisco WebEx Account

Once your account has been provisioned, you will receive a Welcome email notification containing your user ID and a temporary password. Refer to that email to set up your Cisco WebEx Meeting Applications account and complete the instructions in the following sections:

- [Changing Your Password, page 6-1](#)
- [Installing the Productivity Tools Plug-In for Outlook and Cisco WebEx Connect, page 6-2](#)
- [Setting Up the Productivity Tools on Your Computer, page 6-2](#)

Changing Your Password

To change your Cisco WebEx password, follow these steps:

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- | | |
|---------------|--|
| Step 1 | Go to the Cisco WebEx Meeting Applications website at the following URL:
https://cisco.webex.com/ |
| Step 2 | Click the My WebEx tab and log in to My WebEx with your user ID and the Cisco WebEx password that was sent to you by email. |
| Step 3 | Click on the My Profile button in the left navigation panel. |
| Step 4 | Click on the Change Password link below your user name. |

Step 5 Enter the system-generated password, then enter and confirm a new password.

Step 6 Click **OK**.



Note Administrative Assistants must also set up proxy permissions in My Profile. See [Setting Proxy Permissions](#).

Installing the Productivity Tools Plug-In for Outlook and Cisco WebEx Connect

The Productivity Tools Plug-in installs a Cisco WebEx toolbar in your Outlook Calendar, a One-Click Meeting option on your desktop, in Cisco WebEx Connect and in Sametime Connect (IM).

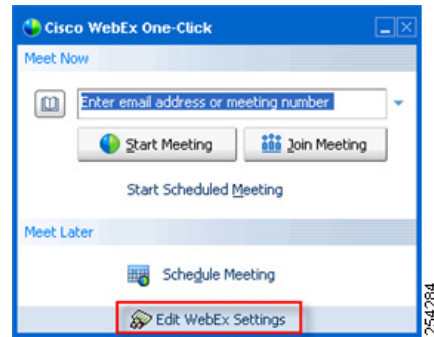
To install the Productivity Tools Plug-in, follow these steps:

- Step 1** Close Outlook and Sametime Connect (IM).
- Step 2** Go to the [Cisco WebEx Meeting Applications](https://cisco.webex.com/) website at the following URL:
<https://cisco.webex.com/>
- Step 3** Click the **My WebEx** tab and log in to My WebEx with your userID and Cisco WebEx Meeting Applications password.
- Step 4** Click **Productivity Tools Setup** on the left navigation panel.
- Step 5** Click the **Install Productivity Tools** button.
- Step 6** Select **Save** to save it your Desktop.
- Step 7** When you see the Download complete message, click **Run**. A security warning screen appears.
- Step 8** Click **Run** again on the security warning screen to begin the installation.
- Step 9** Follow the directions on the Installation Wizard and click **Next** to move through the screens.
- Step 10** Accept the License Agreement, and the default Destination Folder.
- Step 11** Click **Finish** to exit the Wizard.
- Step 12** Restart your computer to complete the installation.

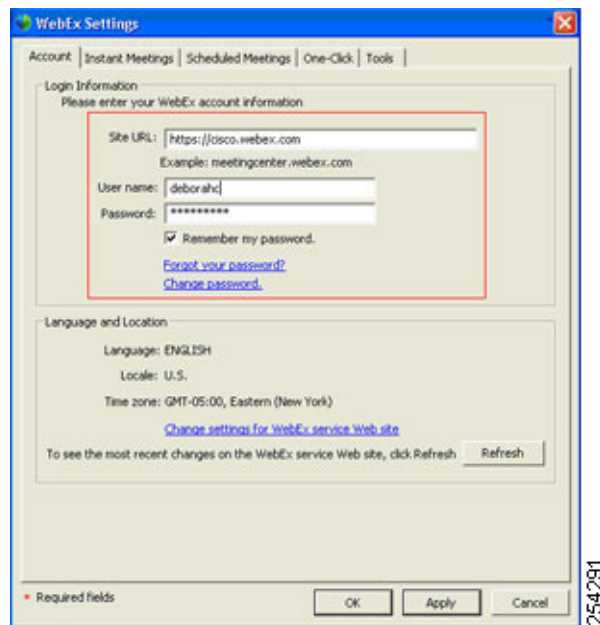
Setting Up the Productivity Tools on Your Computer

Before you can use the productivity tools, you must link them to your Cisco WebEx account. To link the Productivity Tools to your Cisco WebEx account, follow these steps:

- Step 1** Double click on the Cisco WebEx ball icon on your Desktop. The Cisco WebEx One-Click window opens, as shown in [Figure 6-1](#).

Figure 6-1 Cisco WebEx One-Click Window

Step 2 Click the **Edit WebEx Settings** link. The Cisco WebEx Settings window appears, as shown in Figure 6-2.

Figure 6-2 Cisco WebEx Settings Window

Step 3 Go to the Cisco WebEx Settings Account tab and enter the following in the Login Information fields:

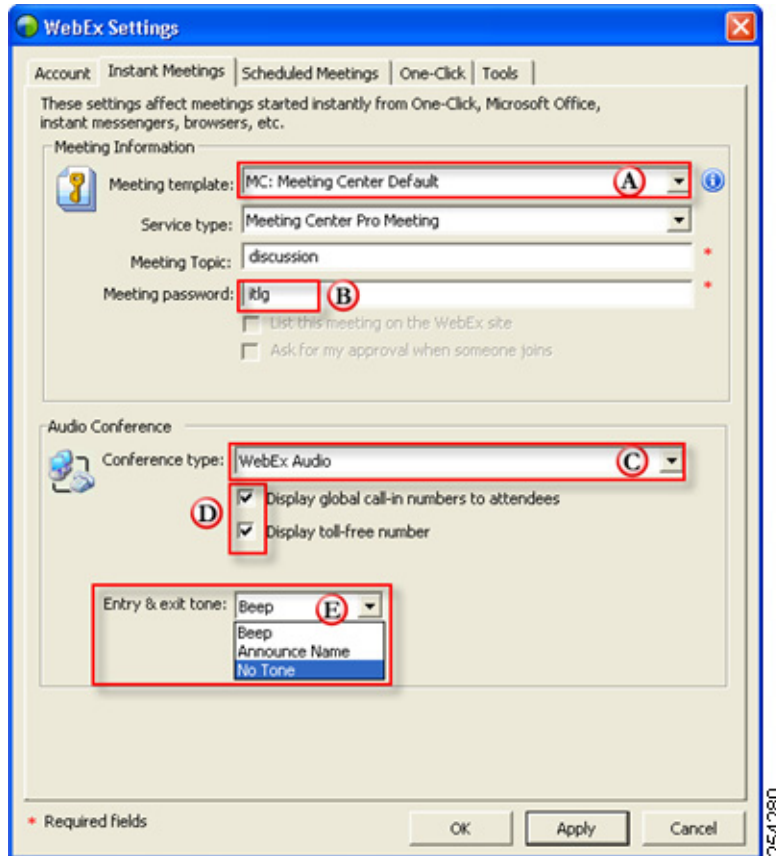
- Site URL: <https://cisco.webex.com>
- User name: Your userID
- Password: Your Cisco WebEx Meeting Applications password

Step 4 Check the **Remember my password** option.

Step 5 Click **Apply** to save your account Information.

Step 6 Set your meeting defaults by clicking the **Instant Meetings** tab, as shown in Figure 6-3.

Figure 6-3 Cisco WebEx Settings Instant Meetings



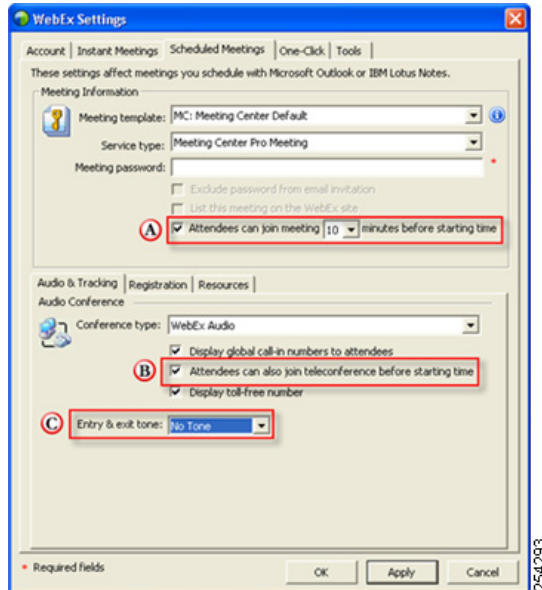
Step 7 Set the following Instant Meetings preferences:

- a. Choose **MC: Meeting Center Default** [A] as the default template. This will allow participants to attend with video.
- b. Enter a **Meeting Password** [B] for your Instant Meetings—This can be any combination of letters and/or numbers but should be short and should not be the same as your Cisco WebEx password.
- c. Select **WebEx Audio** [C] as the Conference type, and check the options [D] to allow attendees to display global call-in and toll-free numbers.
- d. Select an **Entry & exit tone** [E] to play as people join the audio teleconference.

Step 8 Click **Apply** to save your Instant Meetings settings.

Step 9 Click the **Scheduled Meetings** tab and set your Scheduled Meeting preferences as you did for the Instant Meetings. On this tab, you should check the following, as shown in [Figure 6-4](#):

- Attendees can join meeting [select the minutes] before starting time [A].
- Attendees can also join teleconference before starting time [B].
- Select an **Entry & exit tone** [C] to play as people join the audio teleconference.

Figure 6-4 *Scheduled Meetings Settings*

- Step 10** Click **Apply** to save your Scheduled Meeting settings.
- Step 11** Go to the One-Click tab to verify your One-Click window preferences.
- Step 12** Go to the Tools tab to verify that all the software programs are checked in for which you wish to have Cisco WebEx One-Click available.
- Step 13** Click **OK** to save your setup.

Setting Proxy Permissions

If you need to schedule Cisco WebEx meetings on behalf of someone else, they will need to give you permission to do this in both their Cisco WebEx account and the Outlook Calendar, as described in the following sections:

- [Setting Proxy Permissions in Cisco WebEx](#)
- [Setting Proxy Permissions in Outlook Calendar](#)

Setting Proxy Permissions in Cisco WebEx

To grant Cisco WebEx proxy permissions in Cisco WebEx, follow these steps:

- Step 1** Go to the [Cisco WebEx Meeting Applications](https://cisco.webex.com) website at the following URL:
<https://cisco.webex.com>
- Step 2** Click on the **My WebEx** tab at the top of the page.
- Step 3** Log in to **My WebEx** with your UserID and your Cisco WebEx Meeting Applications password.
- Step 4** Click on the **My Profile** button in the left navigation panel.

- Step 5** Scroll down to **Session Options** and click on **Select From Host List [A]** next to Scheduling Permission, as shown in [Figure 6-6](#). [Figure 6-5](#) shows details from the Select From Host List field.

Figure 6-5 Proxy Schedule



- Step 6** In the search field enter the userID of the person to whom you want to grant proxy permission and click **Go**.



Note

You can only appoint proxy privileges to other users with active Cisco WebEx Meeting Applications accounts of their own.

- Step 7** Select the email address of the person to whom you want to grant proxy permission from the search results list in the left column and click **Add**.



Tip

To remove a name, select the email address in the right column and click **Remove**.

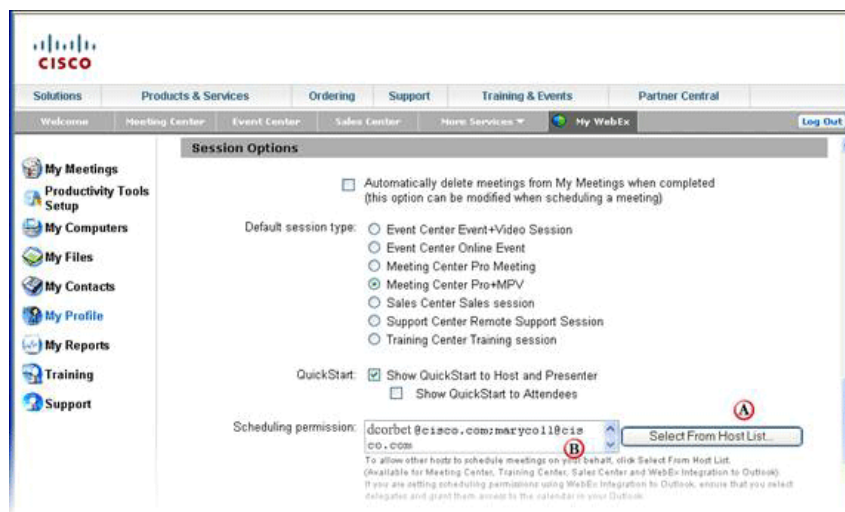
- Step 8** Repeat steps 6-7 to add more proxies, if desired. When you have finished selecting people, click **OK**. You will now see the email addresses of the people you have chosen as proxies in the Scheduling Permission field in Session Options [B], as shown in [Figure 6-6](#).



Tip

You can remove proxy permission by selecting the person's email address in this field and pressing the **Delete** key.

Figure 6-6 Proxy Options



- Step 9** Scroll to the bottom of the My Profile page and click **Update**.

- Step 10** Close the browser window.

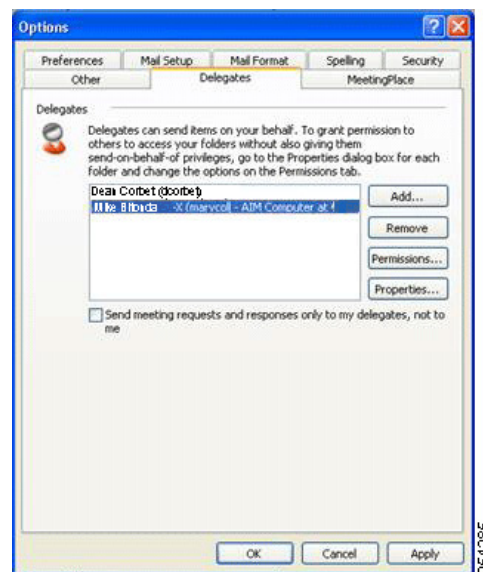
Step 11 Click **OK** to close the Cisco WebEx Settings dialog box.

Setting Proxy Permissions in Outlook Calendar

You must now also grant proxy permission to your Outlook Calendar for the people you have nominated in Cisco WebEx. To grant proxy privileges in Outlook Calendar:

Step 1 Open Outlook. On the Tools menu, select **Options**. The Options dialog box appears, as shown in Figure 6-7.

Figure 6-7 Options: Proxy Delegates

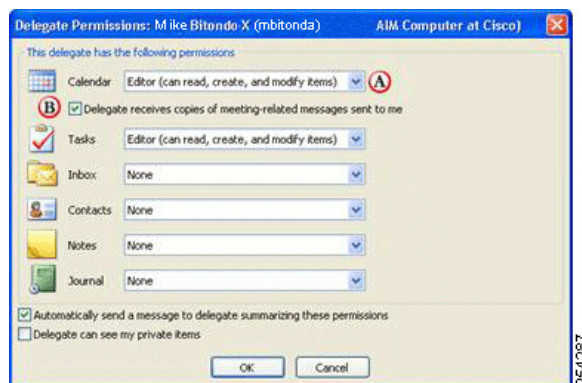


Step 2 Click on the **Delegates** tab.

Step 3 Click the **Add** button and use the Directory to find the name of the person you want to make a proxy.

Step 4 Click **OK**.

Step 5 On the Delegate Permissions dialog box for the Calendar field, choose Editor or Author from the drop down list of permission options [A], as shown in Figure 6-8.

Figure 6-8 Proxy Edit

- Step 6** Select the checkbox “Delegate automatically receives copies of meeting–related messages sent to me” [B].
- Step 7** Select any additional permissions you want to grant to this person and click **OK**.
- Step 8** Repeat steps 3 to 7 to add other delegates, if desired.
- Step 9** Click **OK** to save your changes and close the Options dialog box.

Scheduling Meetings on Behalf of Someone Else



Note

You must first have proxy permission to both their Outlook Calendar and Cisco WebEx accounts before you can schedule a meeting for someone else. Complete the steps in [Setting Proxy Permissions](#) before following the steps in this section.

To schedule a Cisco WebEx meeting for someone else, follow these steps:

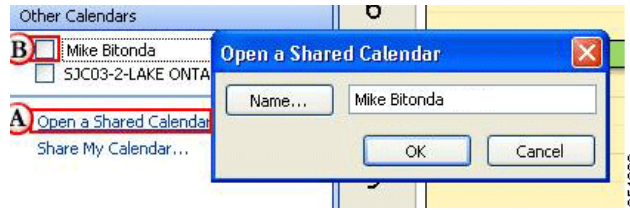
- Step 1** Open the individual’s calendar in Outlook Calendar. If this is the first time you have opened their calendar, do the following:
- Go to **Other Calendars** in the left navigation pane.
 - Click **Open a Shared Calendar** [A], as shown in [Figure 6-9](#), and search for the person in the Directory.



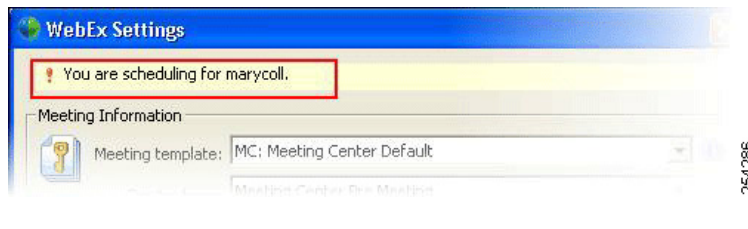
Tip

In the future, you will see the person as an option [B] in Other Calendars; simply check the box beside the name to open their calendar.

- Click **OK** to select the person and to return to the Outlook Calendar main screen.

Figure 6-9 Open a Shared Proxy Calendar

- Step 2** Schedule a meeting in the usual way and click **Add Cisco WebEx Meeting** in the Outlook toolbar.
- Step 3** Complete the Cisco WebEx Settings dialog screen. You will notice that Cisco WebEx notifies you that you are scheduling for someone else, as shown in [Figure 6-10](#).

Figure 6-10 Scheduling For Someone Else

Productivity Toolbars and Menus

The Cisco WebEx Productivity Plug-in installs toolbars or menus in the applications checked on the Tools Tab in Cisco WebEx Settings:

- [Microsoft Outlook Tools](#), page 6-9
- [Microsoft Office Applications](#), page 6-10

Microsoft Outlook Tools

Open Outlook Calendar. Locate the Cisco WebEx toolbar, as shown in [Figure 6-11](#).

Figure 6-11 Microsoft Outlook Cisco WebEx Toolbar

You can do the following using the Cisco WebEx toolbar:

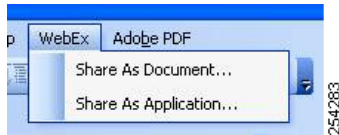
- Click on **One-Click Meeting** to start an instant meeting:
 - Select a time in your calendar and click on **Schedule Meeting**.
 - Complete the Meeting information and then click **Add WebEx Meeting**. See [Chapter 7](#), “Cisco TelePresence WebEx OneTouch Meeting Scheduling Overview” for help with scheduling.

- Click the drop down arrow next to the Cisco WebEx tab to go to My WebEx, Account Settings, and more.

Microsoft Office Applications

In Microsoft Office Documents you should see the Cisco WebEx menu, as shown in [Figure 6-12](#).

Figure 6-12 Microsoft Office Cisco WebEx Menu



You can do the following using the Cisco WebEx Menu:

- Select either **Share As Document** or **Share As Application** to start an Instant Meeting.
- If you already have the presenter ball in a Cisco WebEx meeting, using **WebEx > Share as Document** will share the document in the Meeting Center.

Using Cisco WebEx Connect

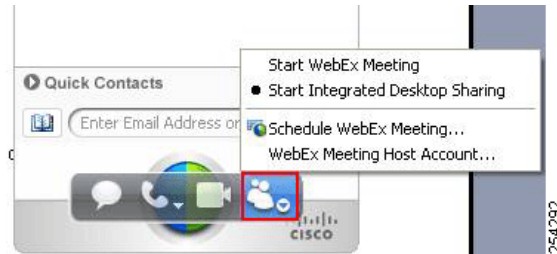
To use Cisco WebEx Connect to initiate a meeting, follow these steps:

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- Step 1** Hover your pointer over the Cisco WebEx ball at the bottom of your screen in Contacts or Spaces.
 - Step 2** Choose the right-most icon for Meetings and select **Start WebEx Meeting**. A web conference automatically opens.
 - Step 3** In the Join Teleconference dialog box, select or enter a phone number and click **OK** to receive a call back from the Cisco WebEx meeting room.
 - Step 4** Go to the Quick Start screen and click **Invite by Email**.
 - Step 5** Enter the email addresses of the invitees separated by commas and click **Invite**. Your One-Click Instant Meeting credentials will be sent as part of the email invitation to participants.
 - Step 6** As the Host you will receive an email to forward to additional Invitees.



Note

If you only need to share your Desktop during a chat session, select a contact and choose **Integrated Desktop Sharing** to meet one-on-one without teleconferencing, as shown in [Figure 6-13](#)

Figure 6-13 **Integrated Desktop Sharing**

Where to Go Next

See [Chapter 7, “Cisco TelePresence WebEx OneTouch Meeting Scheduling Overview”](#) for more information about managing meetings and in-room meeting tools.

