



## Signing In to WebEx Assistant

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Use WebEx Assistant to quickly start or schedule meetings, and set up or change your WebEx account settings without going to your Cisco WebEx site.

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## Signing In to WebEx Assistant

### Before You Begin

Make sure WebEx Productivity Tools is installed on your desktop. Your administrator may have "pushed" the WebEx Productivity Tools to your desktop.

### Procedure

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- Step 1** From the Start menu, select **Start > Programs > WebEx > Productivity Tools > WebEx Assistant**.

The WebEx Assistant dialog box displays. If you previously signed in to WebEx Assistant, the WebEx site URL you were using is displayed in the **Current site is** field at the top of the dialog box.

**Step 2** (Optional) If you used the Mozilla FireFox or Google Chrome browsers to access your Cisco WebEx site and download Productivity Tools, do one of the following:

- Enter your on-premises Cisco WebEx Meetings Server site URL and select **Next**.
- Select **Sign in to WebEx in the cloud** to sign in to a Cisco WebEx site in the cloud, such as a Cisco WebEx Meetings or a WebEx centers site.

**Step 3** (Optional) Select the **Pencil** icon next to the Current site field to switch to a different WebEx site. To enter a new WebEx site URL, do one of the following:

- Enter an on-premises Cisco WebEx Meetings Server site URL and select **Next**.
- Select **Sign in to WebEx in the cloud** to sign in to a Cisco WebEx site in the cloud, such as a Cisco WebEx Meetings or a WebEx centers site.

**Step 4** Enter the email address and password for your WebEx account.

- For LDAP Cisco WebEx sites, enter your company email address and password.
- For Single Sign-On (SSO) Cisco WebEx sites, your company sign-in dialog displays for you to enter your username and password.

**Step 5** Select **Sign In**.

**Step 6** To determine which WebEx site you are signed in to:

- a) Right-click the WebEx Assistant icon on the taskbar and select **WebEx Settings...**
- b) Select the Account tab.

The Account Information section displays the WebEx site you are signed in to. Some Cisco WebEx sites let you change your password or switch to a different Cisco WebEx site from the Account tab. If you make changes, select **Refresh** to update the displayed information.

**Step 7** To sign out of WebEx Assistant, right-click the WebEx Assistant icon on the taskbar and select **Sign Out**.

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## Signing In to WebEx Assistant Using Single Sign-On

Typically you sign in to your WebEx site using your email address and password. However, if your administrator requires that you use single sign-on—that is, sign in through your corporate website, you use a different sign-in process, provided by your company.

### Before You Begin

Make sure that WebEx Productivity Tools are installed. Your administrator may have "pushed" this application out to you. If not, you can download it from the Downloads page on your WebEx site.

The Productivity Tools download page also displays instructions for signing in to the Productivity Tools. Take a note of the URL because you will need it for signing in to WebEx Assistant.

## Procedure

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- Step 1** Do one of the following:
- Select **Sign in using single sign-on**.  
If you don't see the option, enter the email address associated with your WebEx account. Once the system verifies that you can use single sign-on, the option appears.
  - Select **Sign in using corporate website**.
- Step 2** Enter the URL for your WebEx site.  
You are redirected to your corporate website.
- Step 3** Enter the required information to sign in on the page.
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# Switching Sites

This task describes how to switch between multiple Cisco WebEx sites.

## Before You Begin

- To use the Switch Site feature, make sure you have an account on at least one Cisco WebEx Meetings Server site and one Cisco WebEx site in the cloud, or multiple accounts on Cisco WebEx sites in the cloud.
- The email address and password assigned for a Cisco WebEx Meetings Server site must match at least one Cisco WebEx site in the cloud.
- Switch Site is only available if your administrator has enabled the Cloud feature to allow users to sign in the Cisco WebEx in the cloud accounts from WebEx Productivity Tools.

## Procedure

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- Step 1** Sign in to WebEx Assistant using a multi-site account.  
The WebEx Assistant dialog box displays.
- Step 2** Right-click the WebEx Assistant icon in the taskbar and select **Switch Site...**  
The available sites display on the WebEx Assistant dialog box. The Cisco WebEx site you are currently using is listed as Signed in.
- Step 3** Select **Sign in** next to the site you want to use.  
Depending on the selected site, you may be required to temporarily close Microsoft Outlook to complete the switch.
- Note** If required, enter a password, and then select **Sign in**.
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# Starting an Instant Meeting with WebEx Assistant

**Tip**

Once you are signed in to WebEx Assistant, you can start an instant meeting by selecting **Meet Now** from the WebEx Assistant icon on the taskbar or the WebEx toolbar in Microsoft Outlook.

**Before You Begin**

- Make sure WebEx Productivity Tools is installed on your desktop. Your administrator may have "pushed" the WebEx Productivity Tools to your desktop.
- Sign in to WebEx Assistant.
- On the Meetings tab of the **WebEx Settings** dialog box, you can select the **Let me change the meeting topic and password when the meeting starts** check box if you want to override the topic (What) or password Meet Now settings for each instant meeting.

**Procedure**

- Step 1** Right-click the WebEx Assistant icon on the taskbar and select **Meet Now**. Depending on your WebEx Settings, a dialog box requesting meeting-specific information or the **Quick Start** page appears.
- Step 2** (Optional) If you checked the **Let me change the meeting topic and password when the meeting starts** check box on the WebEx Setting dialog box, enter a topic in the What field and a one-time meeting password for this instant meeting. Then select **Meet Now**. The **Quick Start** page appears.
- Step 3** There are two ways to invite people to join your meeting:
- The Meet Now function sends an email invitation for you to forward to invitees.
  - Select **Invite & Remind** on the **Quick Start** page. On the Email tab, enter the email addresses for invitees, and then select **Send**.

**Related Topics**

[Setting Your Instant Meeting Preferences](#)

## Starting a Meeting From Your Instant Messenger

After you install WebEx Productivity Tools, a WebEx tab displays whenever you start a chat from your supported instant messenger client. Select the relevant option to start a meeting or invite people to your WebEx meeting.

### Before You Begin

This release of Cisco WebEx Productivity Tools integrates with the following instant messenger clients:

- Lync 2010 (32-bit)
- Lync 2013 (32-bit)
- Microsoft Office Communicator 2007
- Microsoft Office Communicator 2007 R2

### Procedure

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- Step 1** Open your instant messenger client and select a user from the roster. A chat window opens with a WebEx tab on the top.
- Step 2** To start a meeting, select the **Start Meeting** button on your WebEx tab. Cisco WebEx Meetings launches.
- Step 3** To invite a user to your meeting, select the user from your IM roster. A chat window opens with a WebEx tab on the top.
- Step 4** Select **Invite to Meeting** from the WebEx tab. The meeting link is sent to the user.
- Note** If you already started a WebEx meeting from another interface, such as the website or the Outlook integration, you can still invite users from your instant messenger client by selecting them from your IM roster and using the **Invite to Meeting** button.
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## Scheduling a Meeting with WebEx Assistant

### Before You Begin

- Make sure WebEx Productivity Tools is installed on your desktop. Your administrator may have "pushed" the WebEx Productivity Tools to your desktop.
- Sign in to WebEx Assistant.

### Procedure

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- Step 1** Right-click the WebEx Assistant icon on the taskbar and select **Schedule a Meeting**. A Microsoft Outlook appointment form opens. If you haven't installed Outlook, WebEx will open the **schedule meeting** page.
- Step 2** Enter your meeting details, such as the meeting subject, start and end times, and invitees.
- Step 3** Select **Add WebEx Meeting** from the WebEx toolbar.

The **WebEx Settings** dialog box appears.

- Step 4** (Optional) If you want to include a meeting password, enter it in the Meeting Information section.
  - Step 5** If you want to grant other users the permission to start your meeting on your behalf, select the **Alternate Host** tab and select them from the list.
  - Step 6** Select **OK** to close the **WebEx Settings** dialog box.  
WebEx information displays in your Microsoft Outlook appointment form.
  - Step 7** Select **Send** to save your meeting information and send updates to invitees.
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## Scheduling a Personal Conference Meeting with WebEx Assistant

### Before You Begin

- Make sure WebEx Productivity Tools is installed on your desktop. Your administrator may have "pushed" the WebEx Productivity Tools to your desktop.
- Sign in to WebEx Assistant.
- You cannot assign an Alternate Host for a Personal Conference meeting.

### Procedure

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- Step 1** Right-click the WebEx Assistant icon on the taskbar and select **Schedule a Meeting**.  
A Microsoft Outlook appointment form opens. If you haven't installed Microsoft Outlook, WebEx will open the **schedule meeting** page.
- Step 2** Enter your meeting details, such as the meeting subject, start and end times, and invitees.
- Step 3** Select **Add WebEx Meeting** from the WebEx toolbar.  
The **WebEx Settings** dialog box appears.
- Step 4** On the Audio Conference tab, select either **WebEx Audio** or a **Personal Conference account**.
- Step 5** (Optional) If you select Personal Conferencing as your Audio Connection before you create a host PIN and Personal Conference account, the system asks you to do the following:
  - a) Select **View Audio Options** on the Personal Conference Account Required message box. If you select **Cancel**, the Audio Connection setting returns to **WebEx Audio** and you can continue to schedule a WebEx Audio meeting.
  - b) On the **My Account** page, go to the My Audio Connection Options section.
  - c) Select **Personal Conferencing**.
  - d) Enter a 4-digit host PIN.
  - e) Select **Save PIN and Generate Account**.
  - f) On the **WebEx Settings** dialog box, select **Cancel** to close the dialog box.
  - g) Close the Microsoft Outlook appointment form.

h) Return to Step 1 to schedule the Personal Conference meeting again.

**Step 6** Select **OK** to close the **WebEx Settings** dialog box.  
WebEx information displays in your Microsoft Outlook appointment form.

**Step 7** Select **Send** to save your meeting information and send meeting invitations to invitees.  
The scheduled meeting displays in your Outlook calendar and the list of meetings on your Cisco WebEx site.

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### Related Topics

[Creating Your Personal Conference Account](#)

## Installing WebEx Productivity Tools

Before installing WebEx Productivity Tools, ensure that your computer meets the following minimum system requirements:

- Intel Core2 Duo CPU 2.XXX GHz or AMD processor (2GB of RAM recommended)
- JavaScript and cookies enabled in the browser
- Supported operating systems and browsers



**Note** For the latest end-user system requirements, including supported operating systems and browsers, see the FAQs at [http://www.cisco.com/en/US/products/ps12732/products\\_user\\_guide\\_list.html](http://www.cisco.com/en/US/products/ps12732/products_user_guide_list.html).

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### Procedure

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**Step 1** Sign in to your WebEx site.  
The **Meetings** page appears.

**Note** If you are having sign in issues, make sure that cookies are enabled in your browser. You cannot sign in to Cisco WebEx if cookies are disabled.

**Step 2** In the top navigation, select **Downloads**.

**Note** The Downloads option is only available if your administrator has enabled it.

**Step 3** Under **Productivity Tools**, select **Download**.  
The **File Download** dialog box appears.

**Step 4** (Optional) Save the installation program (with the extension .msi) to your computer.

**Step 5** Run the installation file and follow the instructions.  
After the installation completes, sign in to your WebEx account when prompted, and check your settings in the **WebEx Settings** dialog box.

**Step 6** (Optional) If the download does not start automatically, select the **click here to download** link. Run the installation file and follow the instructions.

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**Related Topics**

[Opening the WebEx Settings Dialog Box, on page 8](#)

## Opening the WebEx Settings Dialog Box

You can open the WebEx Settings dialog box from various access points.

From	Do this
The <b>Start</b> menu	Click <b>Start &gt; Programs &gt; WebEx &gt; Productivity Tools &gt; WebEx Settings</b>
Microsoft Outlook	In the WebEx menu, select <b>Schedule Meeting &gt; WebEx Settings</b> . <b>Note</b> This example uses Microsoft Outlook 2010. The actual procedure may differ depending on your version of Outlook.
<b>WebEx Assistant</b> icon in the taskbar	In the taskbar, right-click the <b>WebEx Assistant</b> icon and choose <b>WebEx Settings</b>

**Related Topics**

[Setting Up WebEx Productivity Tools, on page 8](#)

## Setting Up WebEx Productivity Tools

**Procedure**


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**Step 1** Open the WebEx Settings dialog box.

**Step 2** Select the **Account** tab.

From this tab, you can do the following:

- If applicable, select **Change password** to update your WebEx password.
- Select **Update Regional Preferences** to update your time zone, language, or locale on the **My Account** page. Select **Update** to save your changes, and then return to the WebEx Settings dialog box.  
**Note** The **Time Zone** setting determines the time of a WebEx meeting after the meeting is successfully scheduled. The **Locale** setting determines the format for the time, date, currency and phone numbers displayed on the Meetings page, and the email invitations and notification messages.



- Select **Refresh** to see the most recent changes to your WebEx site.

- Step 3** Select **Apply** to apply any changes.
- Step 4** Select the **Meetings** tab.
- Step 5** Select **Set meeting preferences** to define your default Meet Now Settings (on the My Account page) for your instant meetings. Select **Update** to save your changes, and then return to the WebEx Settings dialog box.
- Step 6** (Optional) If you want the option to change your meeting topic and password before your instant meeting starts, check the provided option.
- Step 7** Select **OK** to close the WebEx Settings dialog box.
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### Related Topics

[Opening the WebEx Settings Dialog Box, on page 8](#)

## Uninstalling WebEx Productivity Tools

This task describes how to uninstall WebEx Productivity Tools from the Windows Start menu. You can uninstall Productivity Tools at any time. Uninstalling Productivity Tools removes all Productivity Tools and shortcuts from your computer.



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**Tip** You can also uninstall Productivity Tools from the Windows Add/Remove Programs option.

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### Procedure

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- Step 1** Click **Start > Programs > WebEx > Productivity Tools > Uninstall**.
- Step 2** Click **Yes** to confirm that you want to uninstall WebEx Productivity Tools.
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