



WebEx™ Productivity Tools for Instant Messengers

Installing and Setting Up WebEx Productivity Tools

You can install WebEx Productivity Tools to start or join meetings instantly using One-Click, Microsoft Office, Web browsers, Microsoft Outlook, IBM Lotus Notes, and instant messengers; or to schedule meetings using Microsoft Outlook or IBM Lotus Notes, without going to your WebEx service site.

After you install WebEx Productivity Tools, you can log in and set options for your WebEx account, set meeting options for instant meetings and scheduled meetings, set preferences for the One-Click panel, and select which Productivity Tools you will use with WebEx.



INSTALLING WEBEX PRODUCTIVITY TOOLS

If your site administrator has turned on WebEx Productivity Tools options for your WebEx service site, all WebEx Productivity Tools are installed automatically on your site. In addition, whenever newer versions are available, WebEx Productivity Tools are updated automatically.

The installation process installs all available WebEx Productivity Tools; however, at any time, you can change your preferences about which applications to use with WebEx Productivity Tools, and you can also change other WebEx account and meeting

preferences by setting options in the WebEx Settings dialog box. For details, see [Setting up WebEx Productivity Tools](#) on page 4.

If necessary, you can also download and install WebEx Productivity Tools manually. Before installing WebEx Productivity Tools, ensure that your computer meets the following minimum system requirements:

- + Windows 2000 SP4, XP SP2, 2003 R2, or Vista
- + Intel x86 (Pentium 400MHZ +) or compatible processor
- + Microsoft Internet Explorer 6.0 SP1, 7.0, Mozilla 1.7, Netscape 8.1, or Firefox 2.0
- + JavaScript and cookies enabled in the browser

Note: The WebEx integration for IBM Lotus Notes is included in the WebEx Productivity Tools installation or download only if your site administrator has turned on the Lotus Notes option for the site.

To install WebEx Productivity Tools from the Productivity Tools Setup page:

- 1 Log in to your WebEx service Web site.
- 2 Click My WebEx > Productivity Tools Setup (on the left navigation bar). The Productivity Tools Setup page appears.
- 3 Under On Your Desktop, click Download Productivity Tools. The File Download dialog box appears.
- 4 Save the installation program to your computer. The name of the installation file has an .ms i extension.
- 5 Run the installation file and follow the instructions.

Once you complete installation, log in using your WebEx account information and then verify your settings in the WebEx Settings dialog box. For more information, see [Setting up WebEx Productivity Tools](#) on page 4.

To install WebEx Productivity Tools from the Downloads page:

- 1 Log in to your WebEx service Web site.
- 2 In the left navigation bar, under Support, click Downloads.
- 3 In the Downloads page, next to the WebEx Productivity Tools heading, click Download Now. The File Download dialog box appears.
- 4 Save the installation program to your computer. The name of the installation file has an .ms i extension.
- 5 Run the installation file and follow the instructions. Once you complete installation, you can log in with your WebEx account information and then verify your settings in the WebEx Settings dialog box. For more information, see [Setting up WebEx Productivity Tools](#) on page 4.

OPENING THE WEBEX SETTINGS DIALOG BOX

To open the WebEx Settings dialog box from the Start menu:

Click Start > Programs > WebEx > Productivity Tools > WebEx Settings. The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from the One-Click Panel:

- 1 If the One-Click Panel is not already open, do one of the following:

- Double-click the WebEx One-Click icon on your desktop.



- Go to Start > Programs > WebEx > Productivity Tools > WebEx > One-Click.
- 2 In the One-Click Panel, click Edit WebEx Settings. The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from the One-Click taskbar icon:

- 1 Right-click the One-Click taskbar icon.
- 2 Choose WebEx Settings from the menu. The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from Microsoft Outlook or IBM Lotus Notes:

In the WebEx menu, click Account Settings. The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from Microsoft Office:

In Microsoft Word, Microsoft Excel, or Microsoft PowerPoint, click WebEx Settings.



The WebEx Settings dialog box appears.

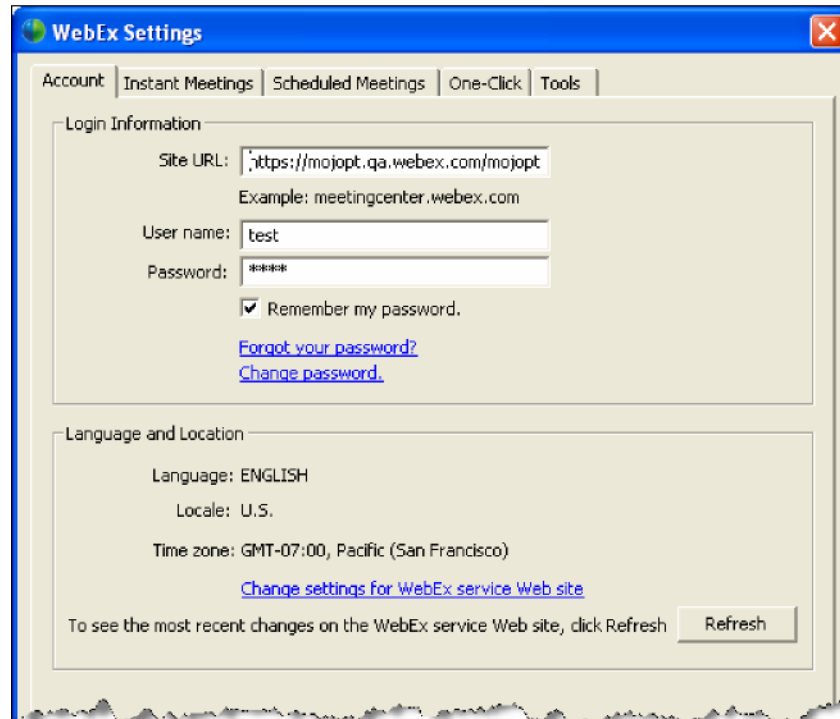
To open the WebEx Settings dialog box from instant messengers:

Click WebEx > WebEx Settings. The WebEx Settings dialog box appears.

SETTING UP WEBEX PRODUCTIVITY TOOLS

To set WebEx Productivity Tool options:

- 1 Open the WebEx Settings dialog box. For more details, see Opening the WebEx Settings dialog box on page 3.



The screenshot shows the 'WebEx Settings' dialog box with the 'Account' tab selected. The 'Login Information' section contains the following fields and options:

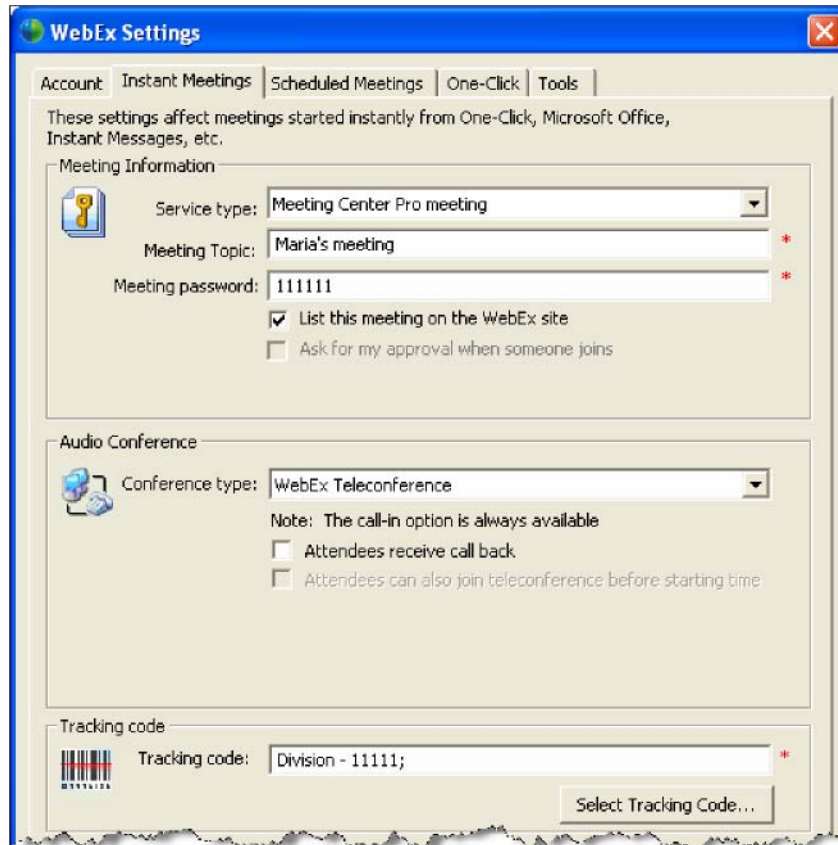
- Site URL: (Example: meetingcenter.webex.com)
- User name:
- Password:
- Remember my password.
- [Forgot your password?](#)
- [Change password.](#)

The 'Language and Location' section contains the following information:

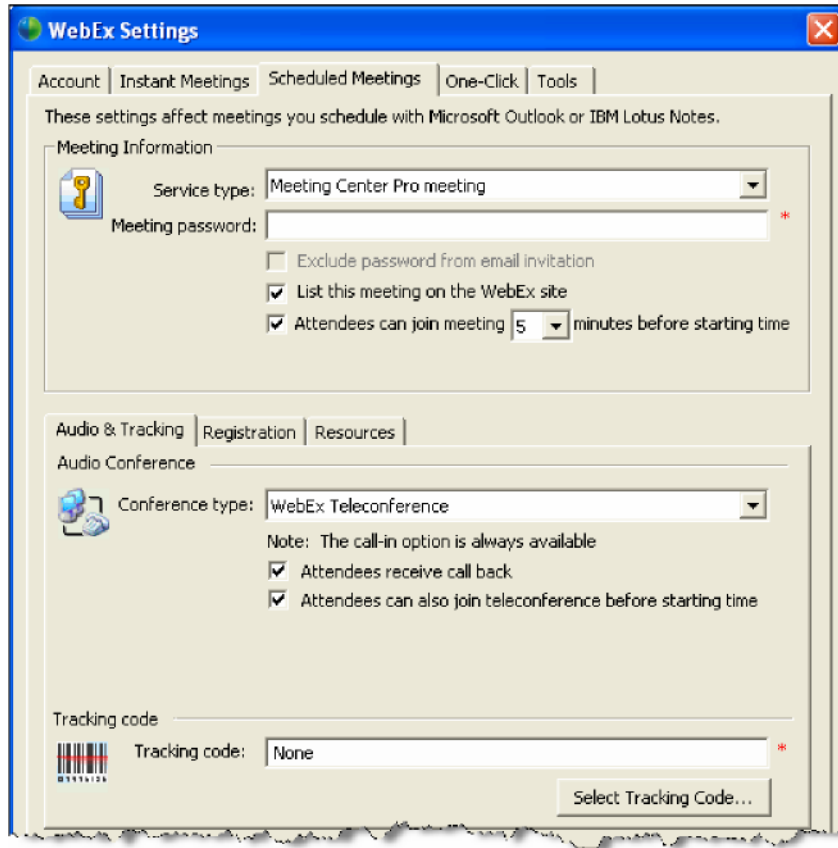
- Language: ENGLISH
- Locale: U.S.
- Time zone: GMT-07:00, Pacific (San Francisco)
- [Change settings for WebEx service Web site](#)

At the bottom, there is a note: 'To see the most recent changes on the WebEx service Web site, click Refresh' and a 'Refresh' button.

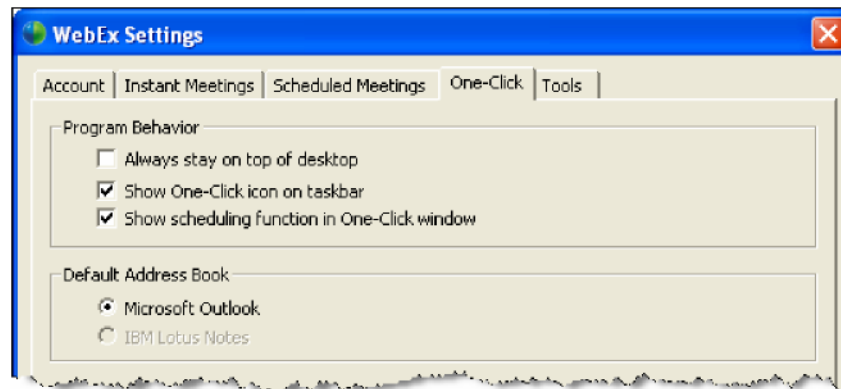
- 2 In the Account tab, log in to your account by specifying the URL for your WebEx service site and entering your user name and password. For more details, see Account tab on page 8.
- 3 Click Apply.
- 4 Click the Instant Meetings tab.



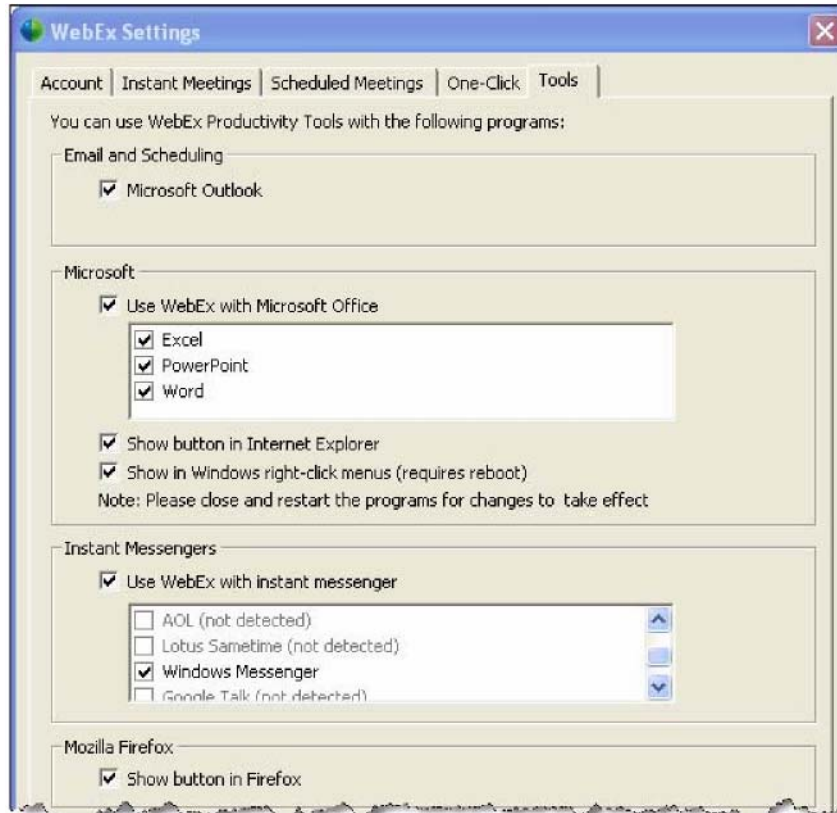
- 5 Specify options for meetings started instantly from the One-Click panel, Microsoft Office, browsers, instant messengers, right-click menus, and from Microsoft Outlook or IBM Lotus Notes. For more details, see Instant meetings tab on page 9.
- 6 Click the Scheduled Meetings tab.



- 7 Specify options for meetings scheduled from Microsoft Outlook or IBM Lotus Notes. For more details, see Scheduled meetings tab on page 11.
- 8 Click the One-Click tab.



- 9 Specify options for the One-Click panel. For more details, see One-Click tab on page 14.
- 10 Click the Tools tab.



- 11 Select which applications to use WebEx integrations with. For more details, see Tools tab on page 14.
- 12 Click OK.

ABOUT THE WEBEX SETTINGS DIALOG BOX

To access the WebEx Settings dialog box from the Start menu:
Click Start > Programs > WebEx > Productivity Tools > WebEx Settings. The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from the One-Click Panel:

- 1 If the One-Click Panel is not already open, do one of the following:
 - Double-click the WebEx One-Click icon on your desktop.



- Go to Start > Programs > WebEx > Productivity Tools > WebEx > One-Click.
- 2 In the One-Click Panel, click Edit WebEx Settings. The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from the One-Click taskbar icon:

- 1 Right-click the One-Click taskbar icon.

- Choose WebEx Settings from the menu. The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from Microsoft Outlook or IBM Lotus Notes:

In the WebEx menu, click Account Settings. The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from Microsoft Office:

In Microsoft Word, Microsoft Excel, or Microsoft PowerPoint, click WebEx Settings. The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from Instant Messengers:

Click WebEx > WebEx Settings.



The WebEx Settings dialog box appears.

Account tab

Account options allow you to log in to your WebEx service site with your user name and password.

| Use this option... | To... |
|---|--|
| Site URL | Enter the URL to the WebEx service site from which the Productivity Tools were |
| User name | Enter the user name for a host account on your WebEx service site. |
| Password | Enter the password for the host account on your WebEx service site. |
| Remember my password | Store the user name and password you entered so that you do not need to enter your user name and site URL next |
| Forgot your password | Open the Login Assistance page on the WebEx service site, which sends you a reminder of your password. |
| Change password | Open a dialog box that allows you to specify a new password. |
| Language | Verify the language that is currently selected for your WebEx service site. |
| Locale | Verify the country or locale that is currently selected for your WebEx |
| Time zone | Verify the time zone that is currently selected for your WebEx service site. |
| Change settings for WebEx service site | Open the My WebEx > My Profile page on your WebEx service site, and make changes to your profile. |

Refresh

Refresh the WebEx Settings dialog box with the most recent settings from the WebEx service site.

Instant meetings tab

Instant meeting options affect meetings started instantly from the One-Click panel, Microsoft Office, browsers, instant messengers, right-click menus, and from Microsoft Outlook or IBM Lotus Notes.

Use this option...**To...**

Service type

Select the type of WebEx session for which you want to start a meeting.
This option lists only the session types available for your site and user account.

Meeting topic

Enter the topic or name for the meeting.

Meeting password

Require participants to enter the password you set to join your meeting.
Your site may require that all passwords comply with security criteria, such as a minimum length and a minimum number of letters, numbers or special characters.

List this meeting on the WebEx site

Include this meeting on the meeting calendars on the WebEx service site.
Available for meetings, sales meetings, and training sessions only.

Do not list Support Session on Personal Meeting Room

Omit this support session from your Personal Meeting Room on the WebEx service site.

Ask for my approval when someone joins

Specify that the Request to Join dialog box appears on your screen when someone tries to join your meeting.
Available for Support sessions only.

Conference type

Select the type of teleconference you would like to use:

- **None:** Specifies that the meeting does not include a teleconference, or the meeting includes a teleconference for which you will provide information for participants using a method other than your meeting service.

- **Our Teleconference:** Specifies that the meeting includes an integrated teleconference. If you select this option, choose one of the following types of teleconferences:

1. **Attendees receive call back:** Select if the meeting includes an integrated call-back teleconference, in which participants provide their phone numbers and receive a call back.
2. **Attendees can also join teleconference before starting time:** Allows attendees to call in to or join a teleconference before starting time.

- **Other teleconference:** Specifies that the meeting includes a teleconference that another service provides. The instructions you type in the text box appear automatically on participants' screens once they join the meeting.

Tip A participant must have a direct phone line to receive a call from the teleconferencing service. However, a participant without a direct phone line can join a teleconference by calling a call-in telephone number, which is always available in the Meeting window.

Tracking code

Identify your department, project, or other information that your organization wants to associate with your meetings. Tracking codes can be optional or required, depending on how your site administrator set them up.

If your site administrator requires you to select a code from a predefined list, select a code from the appropriate drop-down list.

Scheduled meetings tab

Scheduled meeting options affect meetings scheduled from Microsoft Office or IBM Lotus Notes.

| Use this option... | To... |
|--|---|
| Service type | Select the type of WebEx session for which you want to schedule a meeting. This option lists only the session types available for your site and user account. |
| Meeting password | Require participants to enter the password you set to join your meeting. Your site may require that all passwords comply with security criteria, such as a minimum length and a minimum number of letters, numbers or special characters. |
| Exclude password from email invitation | Exclude the meeting password from the email message that is sent to everyone who is invited to your meeting. |
| List this meeting on the WebEx site | Include this meeting in the meeting calendars on the WebEx service site. Available for meetings, sales meetings, events, and training sessions only. |
| Attendees can join the meeting [x] minutes before starting time | Allow attendees to join the meeting within a set number of minutes before the meeting's starting time. Note If you clear this check box or set this option to 0 minutes, you must start the meeting before attendees can join it. |

Audio & Tracking tab

Options that affect audio conferences and tracking.

| Use this option... | To.. |
|------------------------|--|
| Conference Type | Select the type of teleconference you would like to use: None: Specifies that the meeting does not include a teleconference, or the meeting includes a teleconference for which you will provide information for participants using a method other than your meeting service |

Our teleconference: Specifies that the meeting includes an integrated teleconference. If you select this option, choose one of the following types of teleconferences.

- **Attendees receive call back:**
Select if the meeting includes an integrated call-back teleconference, in which participants provide their phone numbers and receive a call back.

- **Attendees can also join teleconference before starting time:** Allows attendees to call in to or join a teleconference before starting time.

- **Other teleconference:**
Specifies that the meeting includes a teleconference that another service provides. The instructions you type in the text box appear automatically on participants' screens once they join the meeting.

Tip A participant must have a direct phone line to receive a call from the teleconferencing service. However, a participant without a direct phone line can join a teleconference by calling a call-in telephone number, which is always available in the Meeting window.

Tracking code

Identify your department, project, or other information that your organization wants to associate with your meetings. Tracking codes can be optional or required, depending on how your site administrator set them up.

If your site administrator requires you to select a code from a predefined list, select a code from the appropriate drop-down list.

Registration tab

Options that affect how attendee registrations are approved.

[Use this option...](#)

[To...](#)

| | |
|--|---|
| Require attendee registration | Specify that all attendees must register to attend the meeting so you can accept or deny entry into your meeting. An attendee cannot attend the meeting until you accept his or her registration request. This option is available only if the Attendees can join the meeting [x] minutes before starting time option is cleared. |
| Automatically accept all registration | Accept all registration requests automatically. If this option is not selected, you must accept registration requests manually by using the options on the Registered Attendees page on the WebEx service site. This option is available only if the Attendees can join the meeting [x] minutes before starting time option is cleared and the Require attendee registration option is selected. |

Resources tab

Options that control how resources are used in meetings.

| Use this option... | To... |
|--|--|
| Info tab templates | Choose a template for the Info tab, which appears in the content viewer during the meeting. The Info tab contains information about the meeting, including the meeting host, teleconference phone numbers, and host key (for the host only). |
| | Note You can choose another template only if one or more customized Info tab templates are available for your meeting service. Your site administrator can add templates for your service. |
| Automatically play the presentation before the host joins | Automatically play a presentation that attendees can view before the host actually joins the meeting. |

One-Click tab

One-Click options affect the features of the One-Click panel.

| Use this option... | To... |
|--------------------------------------|---|
| Always stay on top of desktop | Have the WebEx One-Click panel appear on top of every application or program that is open on your computer. |

| | |
|---|--|
| Show One-Click icon on taskbar | Show the One-Click icon in the taskbar. |
| Show scheduling function in One-Click window | Show the links Start Scheduled Meeting and Schedule Meeting on the panel. Clicking either of the links takes you to the appropriate pages on your WebEx service |
| Microsoft Outlook or IBM Lotus Notes | Select an email and scheduling program for a default address book. WebEx One-Click integrates with the email program you select, making it easy for you to obtain your contacts' email addresses. Clicking on the WebEx One-Click panel opens an address book from the email program you select here. |

Tools tab

Tools options determine which programs include WebEx integrations and shortcuts.

| Use this option... | To... |
|--|---|
| Microsoft Outlook | Show WebEx buttons and commands for scheduling meetings or starting One-Click meetings with Microsoft Outlook using the contacts and calendar from Microsoft Outlook. |
| IBM Lotus Notes | Show WebEx buttons and commands for scheduling meetings or starting One-Click meetings with IBM Lotus Notes using the contacts and calendar from Outlook. |
| Use WebEx with Microsoft Office | Show WebEx buttons for starting a One-Click meeting and automatically sharing a selected file or document from the following Microsoft Office applications: <ul style="list-style-type: none"> + Excel + PowerPoint + Word |
| Show button in Internet Explorer | Show a WebEx button that allows you to start One-Click meetings from the Microsoft Internet Explorer toolbar. |
| Show in Windows right-click menus (requires reboot) | Show a WebEx command that allows you to start a One-Click meeting and automatically share a selected file or document from the right-click shortcut windows available in Windows Explorer. |

Use WebEx with Instant Messenger

Shows WebEx buttons and commands that allow you to start a One-Click meeting from an instant messenger. You can select one or more of the following instant messengers:

- + AOL
- + Google Talk
- + Lotus Sametime
- + Skype
- + Windows Messenger
- + Yahoo Messenger

Show button in Firefox

Shows a WebEx button that allows you to start instant meetings from the Firefox toolbar.

UNINSTALLING WEBEX PRODUCTIVITY TOOLS

You can uninstall WebEx Productivity Tools at any time.

To uninstall WebEx Productivity Tools by using Start menu commands:

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

To uninstall WebEx Productivity Tools by using the Control Panel:

- 1 Click Start > Settings > Control Panel.
- 2 Double-click Add/Remove Programs.
- 3 Click WebEx Productivity Tools.
- 4 Click Remove.
- 5 Click Yes to confirm that you want to uninstall WebEx Productivity Tools.

Note Uninstalling Productivity Tools removes all Productivity Tools and shortcuts from your computer. If you want to keep using some Productivity Tools but disable others, edit the options in the WebEx Settings dialog box. For details, see [Setting up WebEx Productivity Tools](#) on page 4.

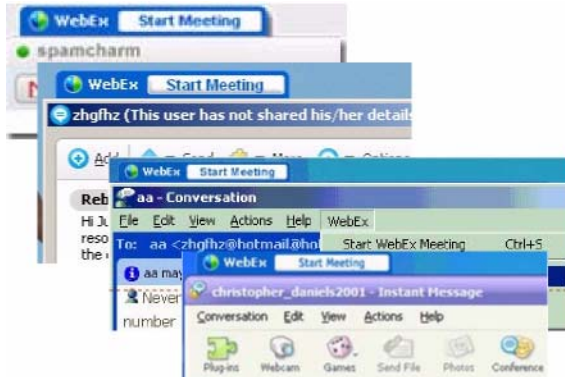
Using WebEx Productivity Tools for Yahoo Messenger, AIM, Skype, or GoogleTalk

WebEx Productivity Tools allow you to start a WebEx instant meeting from your instant messenger (IM), without going to your Meeting Center Web site. You can invite any of your contacts who are online and available, and who use one of these instant messengers:

- + Yahoo Messenger
- + AOL Instant Messenger (AIM)
- + Skype
- + Google Talk

Productivity Tools integration to instant messengers

- + start an instant meeting from a chat window
- + Invite more contacts to the meeting
- + Re-invite contacts to the meeting



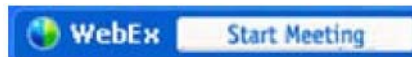
Note: The IM contacts who join your instant meeting do not need to install the WebEx integration.

STARTING AN INSTANT MEETING

You can start an instant meeting from a single or multi-chat window and automatically invite contacts participating in the chat to the meeting. After the meeting starts, an invitation message is sent to each participant via the chat window. To join the meeting, each contact simply clicks the link.

To start a meeting from a chat window:

- 1 Open a chat window with the contact.
- 2 In the chat window, click Start Meeting at the top of the open chat window.



- If you are chatting with just one buddy, a personalized invitation link is sent to that buddy via the chat window.
- If you are in a multi-chat window, a generic invitation link is sent to each participant via the chat window.

To join the meeting, invited contacts simply click the link in the chat window.

The meeting starts and a dialog box opens in which you can confirm that you want to send the invitation to this contact. The Start Meeting button changes to Send Invite Again. At any time during the meeting you can invite additional contacts.

INVITING MORE CONTACTS TO A MEETING IN PROGRESS

Once you start an instant meeting, you can invite additional contacts to join the meeting.

To invite another contact to join a meeting in progress:

- 1 Open a new chat window with the contact.

Notice that the WebEx button at the top of the chat window now appears as Invite to Meeting.

2 In the chat window, click Invite to Meeting.



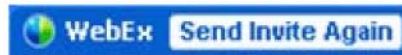
A personalized invitation link is sent to that chat participant via the chat window. To join the meeting, the contact simply clicks the link.

REISSUING MEETING INVITATIONS

When you start an instant meeting from a chat window, an invitation link is sent to each chat participant. If a contact does not respond by joining the meeting, you can reissue the invitation.

Notice that the WebEx button at the top of the chat window now appears as Send Invite Again.

To re-invite contacts to a meeting: Click Send Invite Again.



A generic invitation link is reissued to each chat participant.

Using WebEx Productivity Tools for IBM Lotus Sametime

WebEx Productivity tools allow you to start an instant meeting from your IBM Lotus Sametime instant messenger (IM), without going to your Meeting Center Web site. You can invite any of your IM contacts who are online and available.

Productivity Tool integration to IBM Lotus SameTime



- + start a meeting from the main panel of your IM
- + start a meeting from a chat window
- + Invite contacts to a meeting in progress
- + Re-invite contacts

Note: The IM contacts who join your instant meeting do not need to install the WebEx integration.

STARTING AN INSTANT MEETING FROM THE MAIN WINDOW

You can use the main window of Sametime to start an instant meeting and invite a single contact or a group of contacts to the meeting.

To start an instant meeting from the main window of Sametime, do either of the following:

- + Right click on a contact or group name and choose Start Meeting from the resulting menu.

The meeting is started. The chat window opens and the invitation link is sent via the chat window to the selected contact or group of contacts.

- + Click the WebEx icon on the tools menu, or choose Start WebEx Meeting from the menu at the top of the window.

The meeting is started. Now you can invite your IM contacts to the meeting

In the main window of Sametime, click on a contact or group name and choose Invite to Meeting from the resulting menu.

You can invite additional contacts to the meeting, as required

STARTING AND INSTANT MEETING FROM A CHAT WINDOW

Starting an instant meeting from an existing chat window allows you to invite contacts already in the chat window to the meeting.

To start a meeting from an existing chat window, do one of the following:

- + Click the WebEx icon on the tool bar.
- + Click WebEx at the top of the chat window and choose Start WebEx Meeting.

The meeting starts and the WebEx menu and icon options change from Start Meeting to Send Invite Again.

At any time during the meeting you can invite additional contacts.

INVITING MORE CONTACTS TO A MEETING IN PROGRESS

Once you start an instant meeting with a contact, you can invite more contacts to the meeting.

To invite additional contacts to a meeting in progress:

- 1 Open a new chat window with another contact.
- 2 Do one of the following:
 - Click the WebEx icon on the tool bar.
 - Click WebEx at the top of the chat window and choose Invite to current WebEx Meeting.

A customized invitation link is sent to the contact. To join the meeting, the contact simply clicks the link.

- 3 Repeat the above steps to invite additional contacts to the meeting.

REISSUING INSTANT MEETING INVITATIONS

After you start an instant meeting from Sametime, an invitation link is sent to the chat participants via the chat window. If a contact you invited does not respond by joining the meeting, you can reissue the invitation.

To re-invite contacts to an instant meeting:

Do one of the following:

- + Click the WebEx icon on the tool bar.
- + Click WebEx on the menu bar at the top of the chat window and choose Send Invite Again.

An invitation link is reissued to all chat participants via the chat window.

Using WebEx Productivity Tools for MS Windows Messenger

WebEx Productivity tools allow you to start a WebEx instant meeting from your MS Windows Messenger, without going to your Meeting Center Web site. You can start a meeting with any of your instant messenger (IM) contacts who are online and available.



Productivity Tools Integration to Windows Messenger

- + start an instant meeting from the main panel of your IM
- + start an instant meeting from a chat window
- + Invite contacts to a meeting in progress
- + Re-invite contacts

Note The IM contacts who join your instant meeting do not need to install the WebEx integration.

STARTING AND INSTANT MEETING FROM THE MAIN WINDOW

You can start an instant meeting from the main window of Windows Messenger and invite a contact to the meeting.

To start a meeting from the main window of your IM:

- 1 Click WebEx on the menu bar and choose Start WebEx Meeting. The Start WebEx Meeting dialog appears with a list of your contacts.

You can send an invitation to join the meeting to one contact on this list.



- 2 Select a contact, and click OK.

The meeting starts and a dialog box opens in which you can confirm that you want to send the invitation to this contact.

- 3 Click Yes.

A chat window opens and a personal invitation link is sent via the chat window to the selected contact

Important If you want to invite more contacts to the meeting, do not close the chat window with the contact you already invited.

You can invite additional contacts to the meeting.

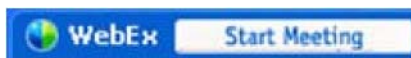
STARTING A MEETING FROM A CHAT WINDOW

Starting an instant meeting from an existing chat window allows you to invite any contact participating in the conversation to the meeting.

To start a meeting from an existing chat window:

Do one of the following:

- + Click Start Meeting at the top of the panel.
- + Choose Start WebEx Meeting from the WebEx menu.



- + If you are chatting with just one contact, a personalized invitation link is sent to that contact via the chat window.

+ If you are in a multi-chat window, a generic invitation link is sent to each participant via the chat window.

To join the meeting, invited contacts simply click the link in the chat window.

The meeting starts and the WebEx button and menu options change from Start Meeting to Send Invite Again.

At any time during the meeting you can invite additional contacts.

INVITING MORE CONTACTS TO A MEETING IN PROGRESS

Once you start a meeting with a contact, you can invite more contacts to the meeting. You can invite one contact at a time

Important Keep the current chat window open. If you close the window, you cannot invite additional contacts.

To invite another contact to a meeting in progress:

- 1 In the current chat window, on the menu bar click Actions >Invite Someone to this Conversation.
- 2 In the invite dialog box that appears, select the contact you want to invite, and click OK.

- A chat window opens briefly to allow a personalized invitation link to be sent to the recipient. The chat window closes within 7 seconds.

- To join the meeting, the contact simply clicks the link.

- 3 Repeat the above steps to invite additional contacts.

REISSUING MEETING INVITATIONS

After you start an instant meeting from Windows Messenger, an invitation URL link is sent to the conversation participants via the IM chat window. If a contact you invited does not respond by joining the meeting, you can reissue the invitation.

To re-invite contacts to a meeting:

At the top of the chat window, click Send Invite Again.