

WebEx One-Click

User Guide

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Introducing WebEx One-Click

WebEx One-Click allows you to start a meeting instantly from your desktop (desktop version) and from your WebEx service website (Web version). You can set up one or both versions, depending on your needs.

For more information about the desktop version of WebEx One-Click, see [Understanding the desktop version](#) (on page 4). For more information about the Web version of WebEx One-Click, see [Understanding the Web version](#) (on page 4).

The following table shows examples of the desktop version and the Web version of One-Click. For detailed instructions on a particular task, click "More" by a task description.

WebEx One-Click	What you can do
	<ul style="list-style-type: none">▪ Understand the desktop version More... (on page 4)▪ Understand the Web version More... (on page 4)

Important: To use WebEx One-Click, you must have a host account on your WebEx service site.

Understanding the desktop version

The desktop version of WebEx One-Click is a simple way to start and join meetings and send meeting invitations without logging in to your WebEx service site or navigating Web pages. WebEx One-Click lets you start meetings instantly from the One-Click panel or from other applications on your desktop, such as Microsoft Office, Web browsers, Microsoft Outlook, IBM Lotus Notes, and instant messengers.

One-Click also allows you to schedule meetings using Microsoft Outlook or IBM Lotus Notes, without going to your WebEx service site. One-Click integrates with your Microsoft Outlook or IBM Lotus Notes address books, making it easy for you send meeting invitations to those with whom you communicate regularly.

Using this version requires that you download WebEx Productivity Tools, which let you start meetings instantly from your desktop, Microsoft Outlook, IBM Lotus Notes, Microsoft Office applications, Microsoft Internet Explorer, Firefox, and your instant messengers. If your site administrator has allowed the options for WebEx Productivity Tools, it is usually installed automatically, but you can also install it manually. For more details, see *Installing WebEx Productivity Tools* (on page 7).

For more information, see *Using WebEx One-Click Panel and Productivity Tool Shortcuts* (on page 23).

Understanding the Web version

The Web version of WebEx One-Click allows you to start a One-Click Meeting from your WebEx service website. Doing so does not require you to download any application. For details, see *Starting a One-Click Meeting on the Web* (on page 48).

Unlike using the desktop version, you cannot join other hosts' meetings and send meeting invitations from the One-Click Meeting area on your WebEx service website.

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.

The following list describes features for installing and setting up options for WebEx Productivity Tools:

- Install WebEx Productivity Tools [More...](#) (on page 7)
- Open the WebEx Settings dialog box [More...](#) (on page 5)
- Set options for WebEx Productivity Tools [More...](#) (on page 8)
- Uninstall WebEx Productivity Tools [More...](#) (on page 22)

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.

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 Productivity Tools](#) (on page 8).

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:

- Microsoft Windows 2000, XP, 2003, Vista
- Microsoft Internet Explorer 6.0 SP1 or 7.0, or Firefox 3.0 or later
- Intel x86 (Pentium 400MHZ +) or compatible processor
- 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 website.
- 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 **.msi** 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 Productivity Tools](#) (on page 8).

To install WebEx Productivity Tools from the Downloads page:

- 1 Log in to your WebEx service website.
- 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 **.msi** 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 Productivity Tools](#) (on page 8).

Note: System administrators can also perform a mass installation for computers at their site. For more information, see the *IT Administrator Guide for Mass Deployment of WebEx Productivity Tools* at http://support.webex.com/US/PT/wx_pt_ag.pdf.

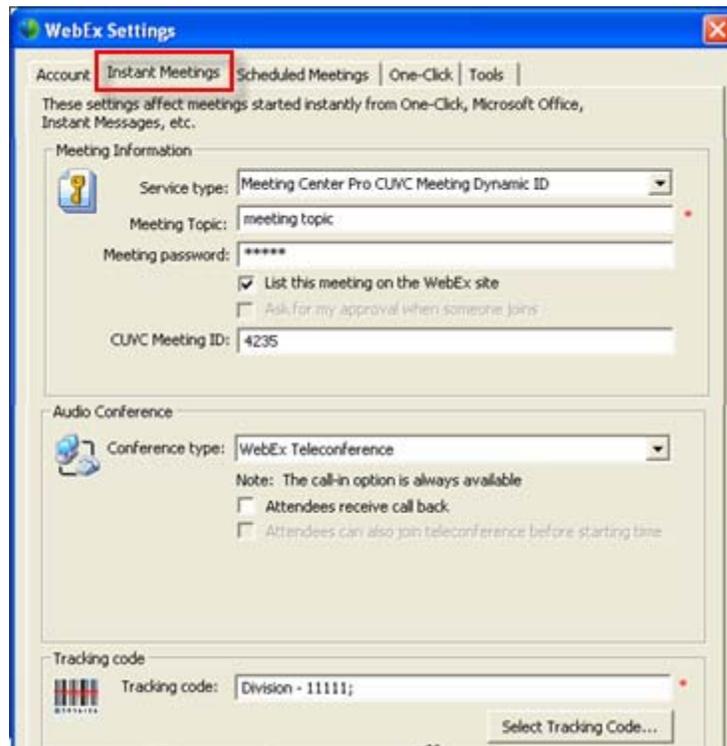
Setting Up WebEx Productivity Tools

To set WebEx Productivity Tool options:

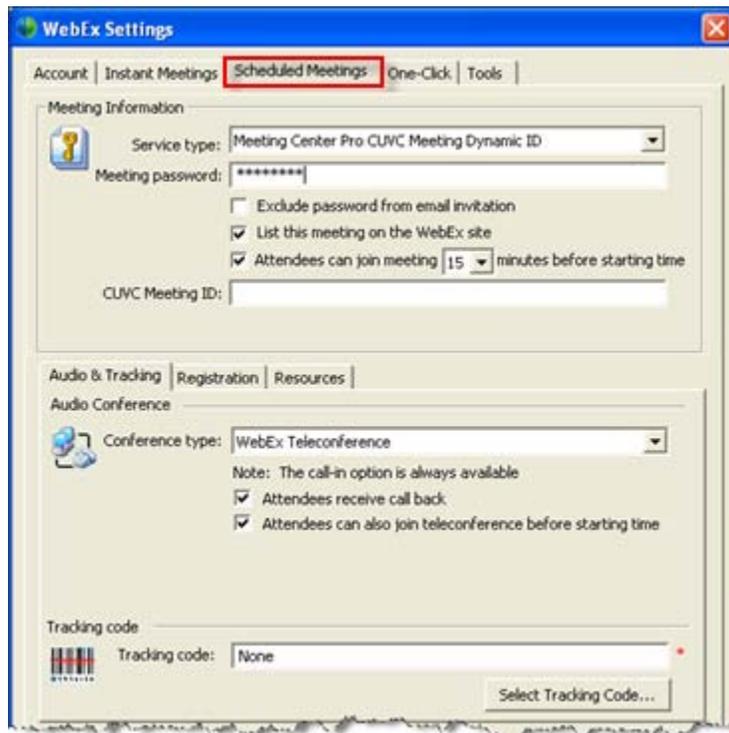
- 1 Open the WebEx Settings dialog box. For more details, see [Opening the WebEx Settings dialog box](#) (on page 5).



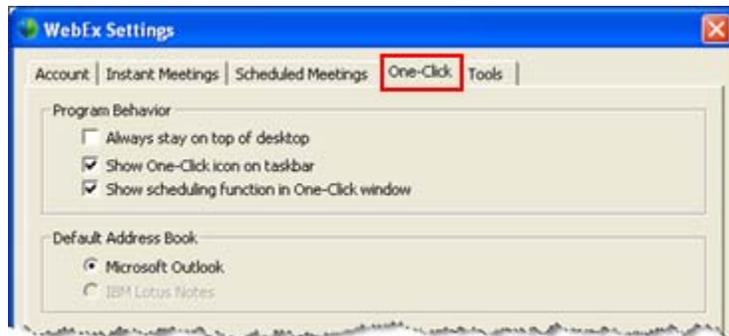
- 2 In the **Account** tab, log in to your account by specifying the URL for your WebEx service site and entering your username and password. For more details, see [About the Account tab](#) (on page 14).
- 3 Click **Apply**.
- 4 Click the **Instant Meetings** tab.



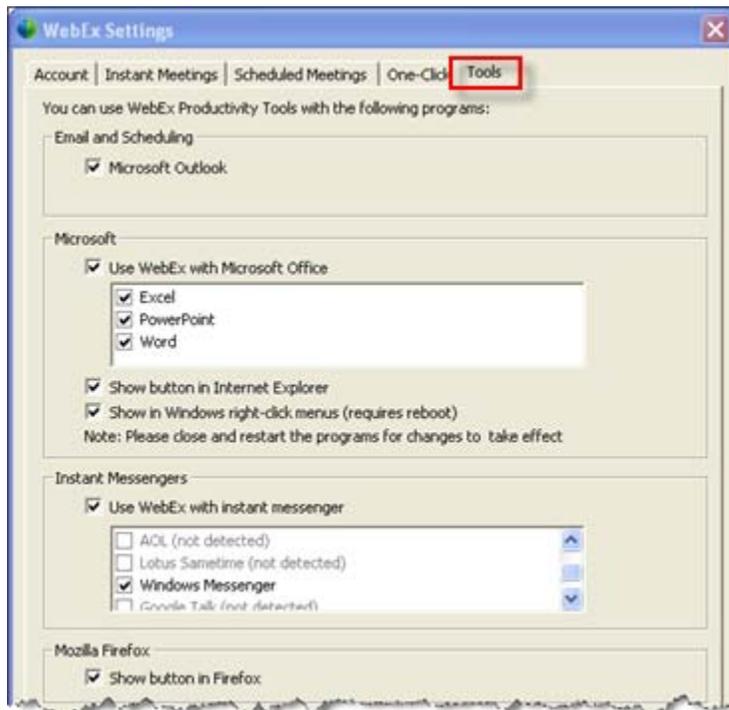
- 5 Specify options for meetings started instantly from the One-Click panel, Microsoft Office, browsers, instant messengers, right-click menus, and from Microsoft Outlook or IBM Lotus Notes. For more details, see [About the Instant Meetings tab](#) (on page 15).
- 6 Click the Scheduled Meetings tab.



- 7 Specify options for meetings scheduled from Microsoft Outlook or IBM Lotus Notes. For more details, see [About the Scheduled Meetings tab](#) (on page 17).
- 8 Click the **One-Click** tab.



- 9 Specify options for the One-Click panel. For more details, see [About the One-Click tab](#) (on page 20).
- 10 Click the **Tools** tab.



Select which applications to use WebEx integrations with. For more details, see [About the Tools tab](#) (on page 21).

About the WebEx Settings dialog box

How to access this 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.
- 2** 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.

Tabs in this dialog box

The WebEx Settings dialog box contains the following tabs:

- Account *More...* (on page 14)
- Instant Meeting *More...* (on page 15)

- Scheduled Meeting [More...](#) (on page 17)
- One-Click [More...](#) (on page 20)
- Tools [More...](#) (on page 21)

About the 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 installed.
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 time you log in.
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 service site.
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.

About the 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.
List Support Session on Personal Meeting Room	Includes this support session in your meetings list on your Personal Meeting Room on the WebEx service site. Available for support sessions only.
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.

Use this option...	To...
Conference type	<p>Select the type of teleconference you would like to use:</p> <p>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.</p> <ul style="list-style-type: none">▪ WebEx Audio: Specifies that the meeting includes a WebEx audio conference, which allows you to use either your telephone or your computer as your audio device for participating in a meeting. If you select this option, choose one of the following options for WebEx Audio:<ul style="list-style-type: none"><input type="checkbox"/> Display global call-in numbers: Select if you want to provide a list of numbers—such as toll-free or local numbers—that attendees in other countries can call to join the teleconference.<input type="checkbox"/> 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.<input type="checkbox"/> Attendees can also join teleconference before starting time: Allows attendees to call in to or join a the WebEx audio conference before starting time. <p>Note: After you start the meeting, participants have a choice of joining by can choose to use their computer as their audio device, using VoIP, or to use their phone as their audio device.</p> <ul style="list-style-type: none">▪ Cisco Unified MeetingPlace Audio Conferencing: Specifies that the meeting include an integrated audio conference with your Cisco Unified MeetingPlace audio conferencing account. If you select this option, choose the type of conference:<ul style="list-style-type: none"><input type="checkbox"/> Attendees call in: Select if you want customers to dial a number to join<input type="checkbox"/> Attendees receive call back: Select if you want customers to type in a phone number and receive a call back from the conferencing service. <p>A participant must have a direct phone line to receive a call from the conferencing service. However, a participant without a direct phone line can join an audio conference by dialing a call-in number, which is always available in the meeting window.</p> <p>Note: The Cisco Unified MeetingPlace Audio Conferencing option is available only if you have a Cisco Unified MeetingPlace account.</p> <ul style="list-style-type: none">▪ 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. <p>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.</p>

Use this option...	To...
Tracking code	<p>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.</p> <p>If your site administrator requires you to select a code from a predefined list, select a code from the appropriate drop-down list.</p>
CUVC Meeting ID	<p>(CUVC Integration to Meeting Center only) Enter a custom URL to create a virtual meeting room in which you can use Cisco Unified Video (CUVC) in your meeting.</p> <p>If you leave this box empty, the WebEx Meeting ID is used by default.</p> <p>When you start your WebEx meeting, the CUVC Video panel displays automatically.</p>

About the Scheduled Meetings tab

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

Use this option...	To...
Service type	<p>Select the type of WebEx meeting you would like to schedule.</p> <p>In addition to the standard meeting types, the list may include one or more of the following options, depending on your site settings:</p> <ul style="list-style-type: none"> ▪ Personal Conference: Allows you to schedule a Personal Conference meeting that begins with an audio portion and automatically includes an online portion you can join later. You must have at least one Personal Conference number account specified in the My WebEx > Personal Conferencing page in order to use this meeting type. ▪ MeetingPlace Personal Conference: Allows you to specify a Cisco Unified MeetingPlace Personal Conference that uses your Cisco Unified MeetingPlace Audio Conferencing account for the audio conference.
Meeting topic	Enter the topic or name for the meeting.
Meeting password	<p>Require participants to enter the password you set to join your meeting.</p> <p>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.</p>

Use this option...	To...
	If you have selected Personal Conference as the meeting type, the default password is the attendee access code in your Personal Conference number account that is specified for the meeting.
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.
Allow external attendees	Allow attendees located on the public internet to join your meeting. If unchecked, only attendees within the same internal network can join. Note: This option is available for Cisco Unified MeetingPlace users only.
CUVC Meeting ID	(CUVC Integration to Meeting Center only) Enter a custom URL to create a virtual meeting room in which you can use Cisco Unified Video (CUVC) in your meeting. If you leave this box empty, the WebEx Meeting ID is used by default. When you start your WebEx meeting, the CUVC Video panel displays automatically.

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: <ul style="list-style-type: none"> ▪ 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. ▪ WebEx teleconference: Specifies that the meeting includes an integrated teleconference. If you select this option, choose one of the following types of teleconferences: <ul style="list-style-type: none"> <input type="checkbox"/> Attendees receive call back: Select if the meeting includes an integrated call-back teleconference, in which participants

Use this option...

To...

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.

- **Personal Conference number:** Displays the personal audio conference accounts you have set up in the Personal Conferencing area of My WebEx. Select the account you want to use for your meeting. You can create up to three accounts.

- **Cisco Unified MeetingPlace Audio Conferencing:** Specifies that the meeting include an integrated audio conference with your Cisco Unified MeetingPlace audio conferencing account. If you select this option, choose the type of conference:

- Attendees call in:** Select if you want customers to dial a number to join

- Attendees receive call back:** Select if you want customers to type in a phone number and receive a call back from the conferencing service.

A participant must have a direct phone line to receive a call from the conferencing service. However, a participant without a direct phone line can join an audio conference by dialing a call-in number, which is always available in the meeting window.

Note: The **Cisco Unified MeetingPlace Audio Conferencing** option is available only if you have a Cisco Unified MeetingPlace account.

- **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	<p>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.</p> <p>This option is available only if the Attendees can join the meeting [x] minutes before starting time option is cleared.</p>
Automatically accept all registration	<p>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.</p> <p>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.</p>

Resources tab

Options that control how resources are used in meetings.

Use this option...	To...
Info tab templates	<p>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).</p> <p>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.</p>
Automatically play the presentation before the host joins	<p>Automatically play a presentation that attendees can view before the host actually joins the meeting.</p>

About the One-Click tab

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

Use this option...	To...
Always stay on top of desktop	<p>Have the WebEx One-Click panel appear on top of every application or program that is open on your computer.</p>
Show One-Click icon on taskbar	<p>Show the One-Click icon in the taskbar.</p>

Use this option...	To...
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 site.
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.

About the 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: <ul style="list-style-type: none"> ▪ AOL ▪ Google Talk

Use this option...	To...
	<ul style="list-style-type: none">▪ 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 Productivity Tools](#) (on page 8).

Using WebEx One-Click Panel and Productivity Tool Shortcuts

Desktop version only

Once WebEx Productivity Tools have been downloaded, the WebEx One-Click panel and Productivity Tool shortcuts are installed on your computer.

The WebEx One-Click panel allows you to do the following:

- Start a One-Click Meeting and invite attendees to the meeting at the same time.
- Join an in-progress meeting hosted on your WebEx service website.
- Edit the settings for your One-Click Meeting.
- Quickly obtain your attendees' or hosts' email addresses from the integration with Microsoft Outlook or IBM Lotus Notes.
- Quickly go to your WebEx service website to start a scheduled meeting or schedule a meeting.

The Productivity shortcuts allow you to start a One-Click Meeting from the following:

- The shortcut (right-click) menu for the One-Click taskbar icon
- Microsoft Outlook and IBM Lotus Notes
- Instant messengers such as AOL Instant Messenger (AIM), Google Talk, Lotus Notes SameTime, Skype, Windows Messenger, and Yahoo Messenger
- Your Web browser (Microsoft Internet Explorer and Firefox only)
- Microsoft Office applications (available for meetings, sales meetings, and training sessions only)

- The shortcut (right-click) menu for applications or document files (available for meetings, sales meetings, and training sessions only)

The following table describes features for the One-Click panel and shortcuts. For detailed instructions on a particular task, click "More" by a task description.

One-Click panel and shortcuts	What you can do here..
	<ul style="list-style-type: none">▪ manage the One-Click panel More... (on page 25)▪ start and join a meeting from the One-Click panel More... (on page 26)▪ obtain email addresses or mobile phone numbers when inviting attendees to a meeting More... (on page 37)▪ starting a One-Click meeting using a shortcut More... (on page 40)

Note: For details about installing WebEx Productivity Tools, see [Installing WebEx Productivity Tools](#) (on page 7).

Starting and joining a meeting from the One-Click panel

The following table describes Productivity Tools features for starting an instant meeting and inviting contacts to the meeting using the One-Click panel. For detailed instructions on a particular task, click "More" by a task description.

WebEx One-Click panel	What you can do
	<ul style="list-style-type: none"> ▪ open the WebEx One-Click panel More... ▪ start a meeting from the WebEx One-Click panel More... (on page 26) ▪ invite attendees to a meeting in progress More... (on page 27) ▪ join an in-progress meeting from the WebEx One-Click panel More... (on page 28) ▪ close the WebEx One-Click panel More... (on page 29)

Opening the WebEx One-Click panel

To open the One-Click panel:

If you closed the WebEx One-Click panel for any reason, you can open it by doing *one* of the following:

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



- Go to **Start > Programs > WebEx > WebEx One-Click > WebEx One-Click**.
- Right-click the WebEx One-Click icon in taskbar, and then click **Open One-Click**.

If you did not specify the option to remember your username and password, enter the required WebEx account information in the Account tab of the WebEx Settings dialog box, and then click OK. For more information about WebEx Productivity Tool settings, see [Setting Up WebEx Productivity Tools](#) (on page 8).

Starting a meeting from the WebEx One-Click panel

You can use the WebEx One-Click panel to start a One-Click Meeting and to send invitation email messages to those whom you want to invite to the meeting.

Before you start a meeting, you can review or modify your meeting options in the WebEx Settings dialog box. For details, see [About the WebEx Settings dialog box](#).

To start a meeting from the WebEx One-Click panel:

- 1 Open your WebEx One-Click panel.

For more information, see [Opening the WebEx One-Click panel](#) (on page 25).

- 2 Optional. Invite attendees to the meeting by entering contacts from your Microsoft Outlook or IBM Lotus Notes address book or mobile number book or by typing their email addresses or mobile phone numbers in the text box. For details, see [Obtaining email addresses or mobile phone numbers from a Microsoft Outlook or Lotus Notes address book](#) (on page 38).

Tip: You can invite up to 16 attendees at one time. Use semicolons to separate email addresses and mobile numbers. You can invite additional attendees after you start the meeting. For more information, see [Inviting attendees to a meeting in progress](#) (on page 27).

- 3 Click **Start Meeting**.

After a brief setup, you are in the meeting; and invited attendees receive their invitation email messages.

If you invited an attendee using the attendee's email address, the attendee must enter his or her name on the Join Meeting page before joining the meeting.

If you invited an attendee using the attendee's name from your Microsoft Outlook or IBM Lotus Notes address book, WebEx One-Click identifies the attendee, and the attendee can then join the meeting immediately.

- 4 Depending on your settings, the Request to Join dialog box may appear, asking for your approval for the joining requests. The following figure shows an example.



Select one of the three approval options, and then click **Accept** or **Reject**, as appropriate.

Note: If your site administrator specifies that your approval is required for each of your One-Click meetings, the Request to Join dialog box shows only the **Accept** and **Reject** options.

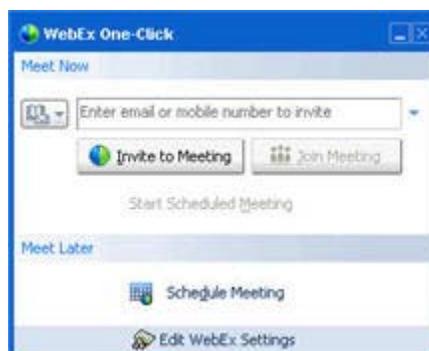
Inviting attendees to a meeting in progress

After you start a One-Click Meeting, you can invite attendees using the One-Click panel.

To invite attendees to a meeting in progress:

On the One-Click panel, enter the contacts from your Outlook address book or type their email addresses in the text box, and then click **Invite to Meeting**.

The following figure shows an example.



Joining an in-progress meeting from the WebEx One-Click panel

You can use the WebEx One-Click panel to join meetings hosted on your WebEx service website.

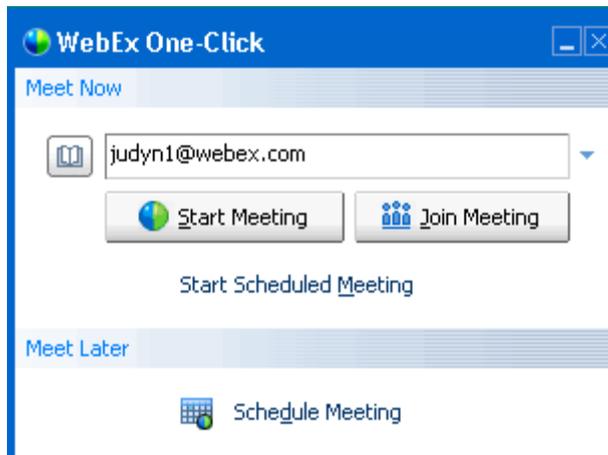
To join a meeting from your WebEx One-Click panel:

- 1 Open your WebEx One-Click panel.

For more information, see *Opening the WebEx One-Click panel* (on page 25).

- 2 Enter either the host's email address or the meeting number in the text box, and then click **Join Meeting**.

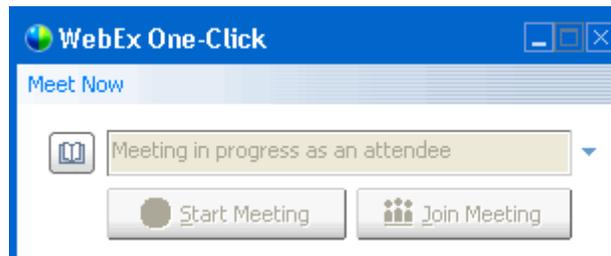
For more information, see *Obtaining email addresses when starting or joining a meeting* (on page 37).



After you enter the meeting number or the host's email address or contact name from your Microsoft Outlook or Lotus Notes address book, click Join Meeting.

- 3 Depending on the host's settings, either wait for the host's approval or enter the password for joining the meeting.

Once you join the meeting, the controls on your WebEx One-Click panel become unavailable. You cannot start a meeting or join another meeting from the panel. The following figure shows an example.



Note: If your site administrator turns off the One-Click Meeting function for unlisted meetings for security reasons, you cannot join an unlisted meeting from the One-Click panel. In this case, join an unlisted meeting by providing the meeting number on your WebEx service site or at the meeting URL provided by your host.

Closing the WebEx One-Click panel

To close the WebEx One-Click panel, do the following:

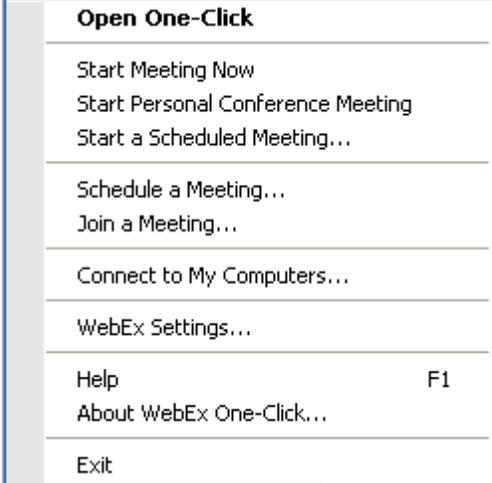
Right-click the WebEx One-Click icon on the taskbar of your desktop, and then choose **Exit**.



WebEx One-Click icon

Starting and joining a meeting from the WebEx One-Click taskbar menu

The following table describes Productivity Tools features for starting an instant meeting and inviting contacts to the meeting using the One-Click panel. For detailed instructions on a particular task, click "More" by a task description.

WebEx One-Click taskbar menu	What you can do
	<ul style="list-style-type: none">▪ start an instant meeting More... (on page 30)▪ start a scheduled meeting More... (on page 31)▪ start a Personal Conference meeting More... (on page 32)▪ schedule a meeting with Microsoft Outlook or IBM Lotus Notes More... (on page 33)▪ join a meeting More... (on page 34)▪ connect to your remote computers using WebEx Access Anywhere or WebEx PCNow More... (on page 36)

Starting an instant meeting from the WebEx One-Click taskbar menu

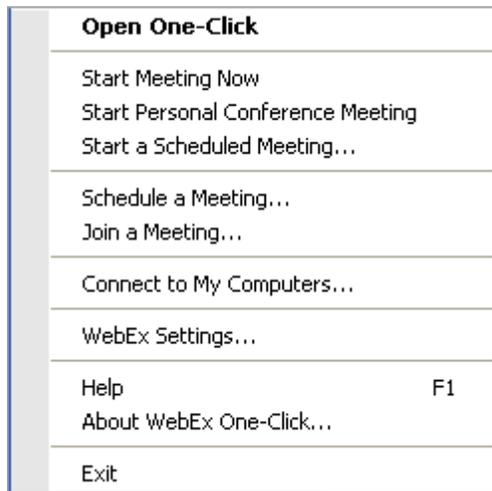
You can use the WebEx One-Click taskbar menu to start an instant meeting.

To start an instant meeting with the WebEx One-Click taskbar menu:

- 1 Right-click the One-Click icon in your Windows taskbar.



The WebEx One-Click taskbar menu appears.



- 2 Choose **Start Meeting Now**.

The meeting starts, and the Meeting Manager window opens. You can use the tools within the Meeting Manager to invite additional attendees to your meeting.

Starting a scheduled meeting from the WebEx One-Click taskbar

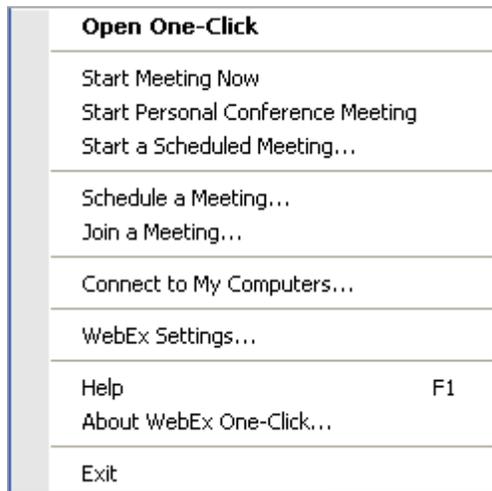
You can use the WebEx One-Click taskbar menu to start meeting that you had scheduled previously with Microsoft Outlook or Lotus Notes or on your WebEx service site.

To start a scheduled meeting with the WebEx One-Click taskbar menu:

- 1 Right-click the One-Click icon in your Windows taskbar.

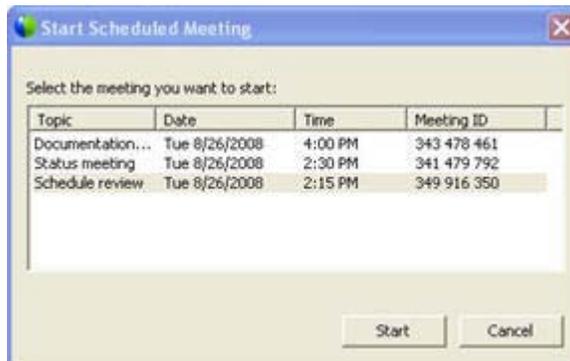


The WebEx One-Click taskbar menu appears.



- 2 Choose Start a Scheduled Meeting.

The Start Scheduled Meeting dialog box appears and displays a list of meetings you have previously scheduled.



- 3 Select the meeting you want to start.
- 4 Click Start.

Your meeting starts and the Meeting Manager window opens.

Starting a Personal Conference meeting from the WebEx One-Click taskbar menu

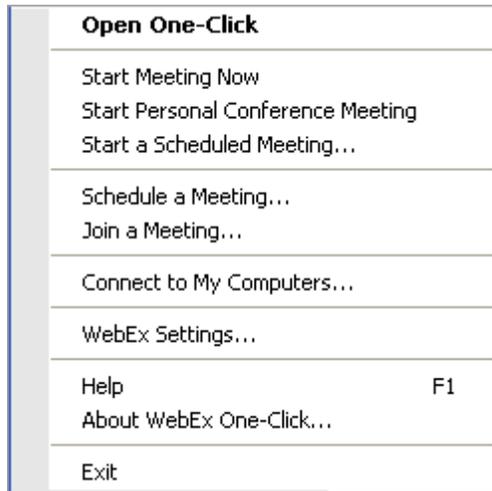
You can use the WebEx One-Click taskbar menu to start an instant or scheduled Personal Conference meeting.

To start a Personal Conference meeting with the WebEx One-Click taskbar menu:

- 1 Right-click the One-Click icon in your Windows taskbar.



The WebEx One-Click taskbar menu appears.



- 2 Select Start Personal Conference Meeting.

Scheduling a meeting from the WebEx One-Click taskbar menu

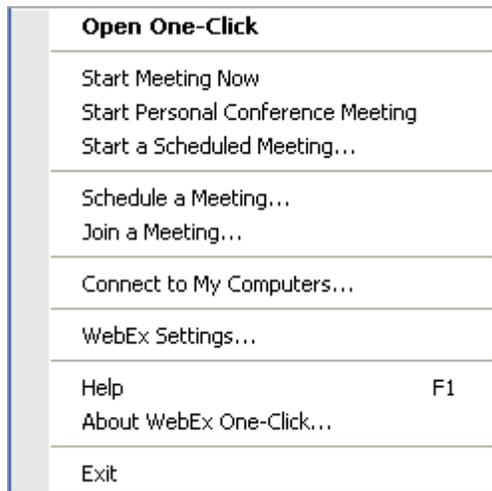
You can use the WebEx One-Click taskbar menu to schedule a meeting with Microsoft Outlook or Lotus Notes.

To schedule a meeting from the WebEx One-Click taskbar menu:

- 1 Right-click the One-Click icon in your Windows taskbar.



The WebEx One-Click taskbar menu appears.



- 2 Choose **Schedule a Meeting**. If you are using the WebEx Productivity Tools integration to Microsoft Outlook or IBM Lotus Notes, the appropriate email program opens, and allows you to schedule a meeting.

You can then add a WebEx meeting with the **Add WebEx Meeting** button. For more details, see the *Integration to Outlook User's Guide* and the *Integration to Lotus Notes User's Guide*, which are available on the Support page of your WebEx Service web site.

Joining a meeting from the WebEx One-Click taskbar menu

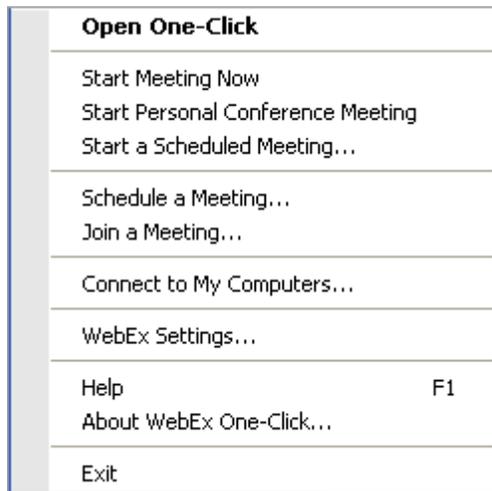
You can use the WebEx One-Click taskbar menu to start an instant meeting or to start a scheduled meeting.

To join a meeting from the WebEx One-Click menu:

- 1 Right-click the One-Click icon in your Windows taskbar.

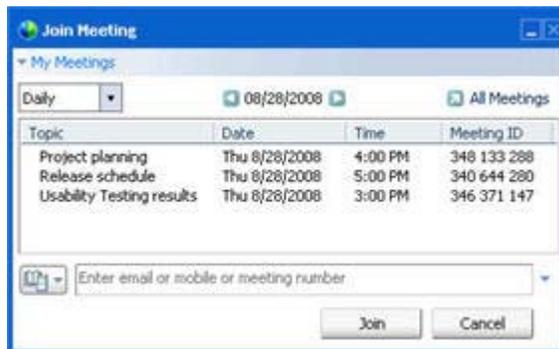


The WebEx One-Click taskbar menu appears.



2 Choose **Join a Meeting**.

The Join Meeting dialog box opens and shows a list of meetings you are invited to for the current day.



- (Optional) Select a different date to show the meetings for that date, or select **Weekly** or **Monthly** to show the meetings for that week or month.
- (Optional) If you want to view all the meetings you are invited to, click **All Meetings** to see the complete list of meetings on your WebEx service site.
- In the box below the list of meetings, enter your email address, mobile phone number, or the meeting number.
- Click **Join**.

Connecting to your remote computers from the WebEx One-Click taskbar menu

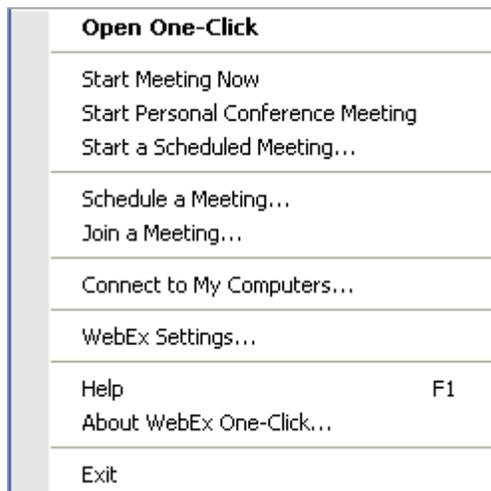
If you have installed WebEx Access Anywhere or WebEx PCNow, you can use the WebEx One-Click taskbar menu to connect to your remote computers.

To connect to remote computers from the WebEx One-Click menu:

- 1 Right-click the One-Click icon in your Windows taskbar.



The WebEx One-Click taskbar menu appears.



- 2 Choose **Connect to My Computers**.

The Connect to My Computers window appears, showing your available remote computers.



- 3 Select the remote computer you want to connect to.
- 4 Click **Connect**.

Obtaining email addresses or mobile phone numbers when starting or joining a meeting

Whether you are starting or joining a meeting, the WebEx One-Click panel lets you quickly obtain and enter the email addresses or mobile phone numbers (for SMS text messaging) you need from an address book in your email program or from the meeting history.

The following table describes features for obtaining email addresses or mobile phone numbers when starting or joining a meeting. For detailed instructions on a particular task, click "More" by a task description.

WebEx One-Click panel	What you can do
<p>address book button and meeting history button</p>	<ul style="list-style-type: none"> ▪ obtain email addresses or mobile phone numbers from a Microsoft Outlook or Lotus Notes address book <i>More...</i> (on page 38) ▪ obtain email addresses from meeting history <i>More...</i> (on page 39)

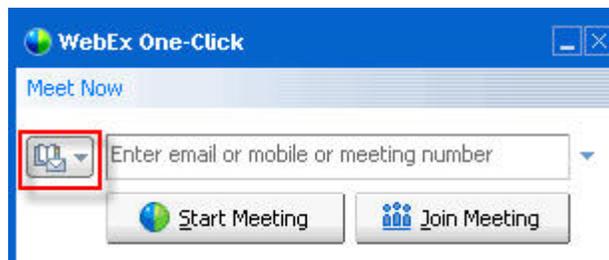
Obtaining email addresses or mobile phone numbers from a Microsoft Outlook or Lotus Notes address book

If you have Microsoft Outlook 2000 SP4 or a later version or IBM Lotus Notes on your computer, the WebEx One-Click panel provides a shortcut to your address books in one of these two email programs, depending on which one you selected in the Tools tab of the WebEx Settings dialog box.

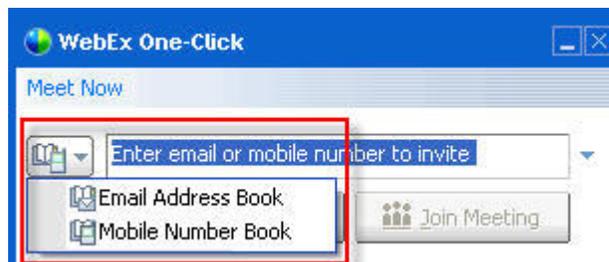
The integration with Microsoft Outlook or Lotus Notes allows you to quickly select contacts or a distribution list from your company's Global Address List (Outlook) or your contacts folder (Lotus Notes), instead of having to manually type their email addresses. Each invited attendee from the email address list will receive an invitation email message, even if he or she is on a distribution list.

If your email program also includes mobile phone number information in its contact information, you can select contacts or a distribution list with mobile phone numbers. Each invited attendee from the mobile phone number list will receive a text message with information on how to join the meeting from his or her mobile phone.

After you open the default email address book or mobile number book, you can also select email addresses or mobile phone numbers from another address book or mobile number book in the selected email program.



Clicking this button takes you to the email address books or mobile number books in the email program you selected.



You can click Email Address Book to select email addresses, or click Mobile Number Book to select mobile phone numbers for text messaging (SMS). To enter a contact or distribution list, select it in the address book, and then click OK

Selecting a default address book for your WebEx One-Click panel

If you have Microsoft Outlook 2000 SP4 or a later version or IBM Lotus Notes on your computer, follow these steps to select a default address book for your One-Click panel.

To select a default address book for your WebEx One-Click panel:

- 1 Right-click the WebEx One-Click icon on the taskbar of your desktop.



- 2 Click **WebEx Settings**.

The WebEx Settings dialog box appears. For details about the WebEx Settings dialog box, see [About the WebEx Settings dialog box](#).

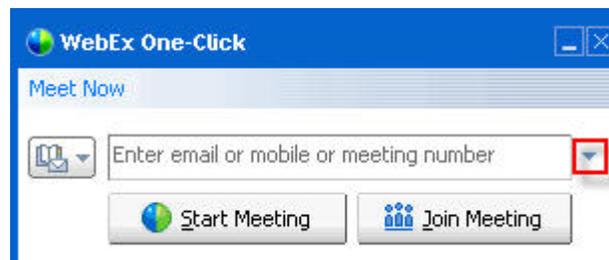
- 3 On the **One-Click** tab, under **Default Address Book**, select *one* of the following:
 - Microsoft Outlook address book
 - IBM Lotus Notes address book

Obtaining email addresses from meeting history

The WebEx One-Click panel "remembers" the last eight email addresses of the hosts whose meetings you joined using the One-Click panel.

Use the meeting history drop-down list to obtain the email addresses of the persons you meet with regularly.

The following figure shows an example.



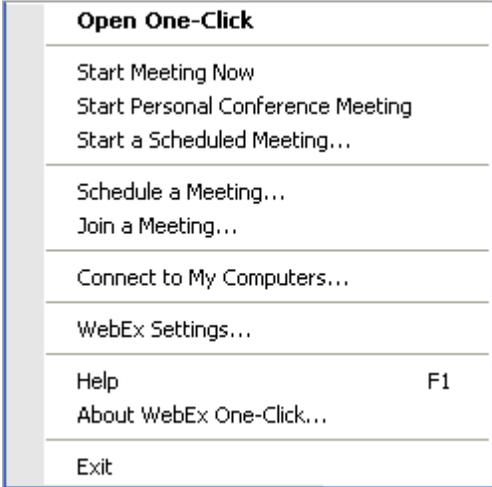
Clicking this downward-pointing arrow displays the meeting history, which includes the last eight email addresses you used when joining a meeting. To enter an email address, select it in the drop-down list.

Starting a One-Click Meeting using a Productivity Tool shortcut

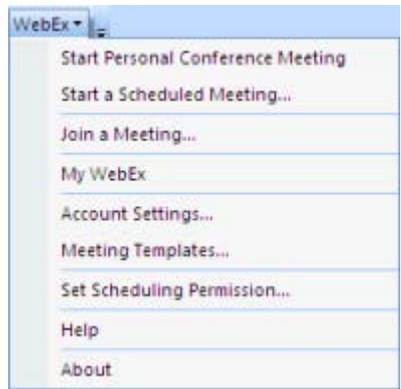
You can start a meeting at any time by clicking a Productivity Tool shortcut. The shortcuts were automatically installed when you first installed WebEx One-Click.

To start a One-Click Meeting using a One-Click shortcut:

Click one of the following shortcuts:

Shortcut	Description
	<p>Right-click menu of taskbar icon shortcut:</p> <ul style="list-style-type: none"> Right-click the WebEx One-Click taskbar icon and then click Start meeting now to start an instant meeting. Right-click the WebEx One-Click taskbar icon and then click Start a Scheduled Meeting to start a previously scheduled meeting, or click Start Personal Conference meeting to start a previously scheduled Personal Conference meeting. <p>Note: You can also right-click the WebEx One-Click taskbar icon and then click Schedule a meeting to schedule a WebEx meeting using Microsoft Outlook or Lotus Notes.</p> <p>For more details, see the <i>Integration to Outlook User's Guide</i> and the <i>Integration to Lotus Notes User's Guide</i>, which are available on the Support page of your WebEx Service web site.</p>
	<p>Email and Scheduling shortcut: Click One-Click Meeting in Microsoft Outlook or Lotus Notes to start a One-Click meeting.</p> <p>Note: You can also click Schedule Meeting in Microsoft Outlook or Lotus Notes to schedule a WebEx meeting using Outlook or Lotus Notes.</p> <p>For more details, see the <i>Integration to Outlook User's Guide</i> and the <i>Integration to Lotus Notes User's Guide</i>, which are available on the Support page of your WebEx Service web site.</p>

Shortcut	Description
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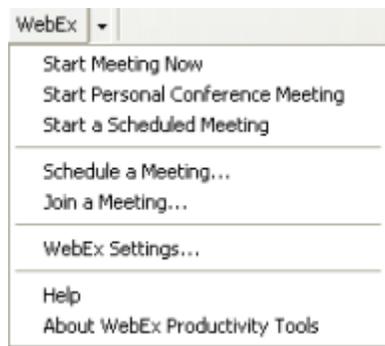


Instant messenger shortcut: Click **WebEx > Start WebEx Meeting** to start a One-Click meeting in your instant messenger, such as Skype, AOL Instant Messenger, Lotus SameTime, Windows Messenger, Google Talk, or Yahoo Messenger. For more details, see the *Integration to Instant Messengers Guide*, which is available on the Support page of your WebEx Service web site.

Available for meetings, sales meetings, training sessions, and support sessions only.



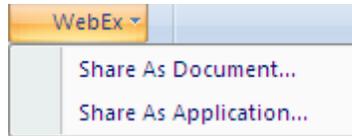
Web browser shortcut: Click this icon to start your meeting.



Note If you previously customized your Internet Explorer toolbar, the shortcut button may not automatically appear on the toolbar. Instead, it is added to the list of available toolbar buttons in Internet Explorer. In this case, you must add the button to the toolbar, using the Internet Explorer **Customize** option. To access this option, on the **View** menu, point to **Toolbars**, and then choose **Customize**.

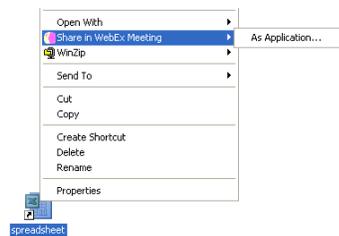
Available for meetings, sales meetings, training sessions, and support sessions only.

Shortcut	Description
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Microsoft Office shortcut: In Microsoft Word, Microsoft Excel, and Microsoft PowerPoint, select **Share As Document** or **Share As Application**. This command starts the meeting and automatically shares the application you are using, including all files that are already open in that application. You can still work in the application during the meeting.

Available for meetings, sales meetings, training sessions, and support sessions only.



Star

Right-Click menu shortcut: Right-click the icon for an application or document file on your computer, and then point to **Share in WebEx Meeting > As Application**. This command starts the meeting and automatically shares the application, including all files that are already open in that application. You can still work in the application during the meeting.

Available for meetings, sales meetings, training sessions, and support sessions only.

Tip:

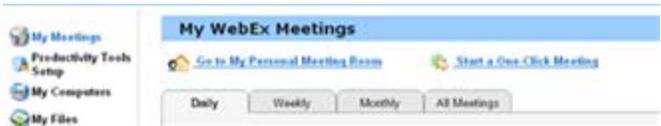
- Once you start a One-Click Meeting, it appears on your Personal Meeting Room page, unless you specified it to be an unlisted meeting. If you provide others with the URL for this page, they can quickly join your meeting by clicking the link for the meeting on this page.
- You can control which shortcuts are available in the WebEx Settings dialog box. For more information, see [About the WebEx Settings dialog box](#) (on page 12).

Starting a One-Click Meeting on the Web

Web version only

In addition to starting a One-Click Meeting from your desktop using the One-Click panel, you can start one from your WebEx service website.

Before you start a One-Click Meeting for the first time, ensure that you set up the meeting options that you want for your One-Click Meeting. For details, see [Setting up your One-Click Meeting on the Web](#) (on page 43).

One-Click meetings on the Web	What you can do
	<ul style="list-style-type: none">▪ specify settings for your One-Click Meeting on the Web More... (on page 43)▪ start a One-Click Meeting from your WebEx service website More... (on page 48)

Setting up your One-Click Meeting on the Web

The settings you specify apply to both the One-Click Web version and the desktop panel version.

To set up your One-Click Meeting:

- 1 Log in to your Meeting Center website.

- 2 Click **My WebEx > Productivity Tools Setup** (on the left navigation bar).

The Productivity Tools Setup page appears.

On this screen, you can also download WebEx Productivity Tools, which include the desktop version of One-Click and its shortcuts. For details, see [Installing WebEx Productivity Tools](#).

- 3 Click **Set Up Now**.

The One-Click Setup page appears.

- 4 Specify the meeting information and settings on the page.

For details about the options on the One-Click Settings page, see [About the One-Click Settings page](#).

- 5 Click **Save**.

Tip: Whenever you want to edit options for your One-Click Meeting, return to the One-Click Settings page by clicking **My WebEx > Productivity Tools Setup > Edit Settings**.

About the One-Click Settings page

How to access this page:

Do *one* of the following:

- If you are setting up your One-Click Meeting for the first time, on your WebEx service website, click **My WebEx > Productivity Tools Setup** (on the left navigation bar) > **Set Up Now**.
- If you already set up your One-Click Meeting, on your WebEx service website, click **My WebEx > Productivity Tools Setup** (on the left navigation bar) > **Edit Settings**.

What you can do here:

- Set options for your One-Click Meeting
- Download the desktop version of WebEx One-Click. For details, see [Installing WebEx Productivity Tools](#).

Meeting Options

Use this option...	To...
Service type	Select the type of WebEx session for which you want to start a One-Click Meeting. This option lists only the session types available for your site and user account.
Meeting template	Select the meeting template you want to use to set options for your One-Click Meeting. The drop-down list of templates includes: <ul style="list-style-type: none"> ▪ Standard templates: Templates that your site administrator set up for your account. ▪ My Templates: Any personal templates that you created by saving the settings for a meeting you previously scheduled, using the scheduling options on your site.
Topic	Specify the topic for the meeting.
Meeting password	Specify the password for the meeting.
Confirm password	Type the password again to prevent typing errors.
Listed on calendar	Specify that the meeting appears on the calendar on your site. Available for meetings and sales meetings only.
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.
List support session on Personal Meeting Room	Specify that the support session appears on your Personal Meeting Room page. You can share with your customers the URL to this page and have them join your session from the page. Available for support sessions only
Listed for all	Specify that the training session appears for any users who visit the the Live Sessions page on your site. Available for training sessions only.
Listed for authorized users only	Specify that the training session appears on the Live Sessions page for only users who have user accounts and have logged in to your site. Available for training sessions only.
Unlisted	Specify that the training session does not appear on the Live Sessions page on your site. An unlisted training session prevents anyone from viewing information about the session, such as its host, topic, and starting time; and helps to prevent unauthorized access to the session.

Use this option...	To...
	To join an unlisted training session, an attendee must provide a unique session number. Available for training sessions only.
List support session on Personal Meetings page	Specify that the support session appears on your Personal Meetings page. Available for support sessions only.

Tracking Codes

Use this option...	To...
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.

Audio Conference

meetings, training sessions, and sales meetings only

Use this option...	To...
WebEx Audio	Select the type of audio conference you would like to use: WebEx Audio: Specifies that the meeting includes an integrated audio conference. If you select this option, select one of the following options: <ul style="list-style-type: none">▪ Display toll-free number: Select if your site provides toll-free call-in audio conferencing, in which both a toll-free number and a toll number are available. If your participants dial a toll-free call-in number, your organization assumes the charges for the calls. Otherwise, participants assume the charges for their calls.▪ Attendees receive call back: Select if your site includes an integrated call-back audio conference, in which participants provide their phone numbers and receive a call back. Display global call-in numbers to attendees: Select if you want to provide a list of numbers—such as toll-free or local numbers—that attendees in other countries can call to join the teleconference.

Use this option...	To...
	<ul style="list-style-type: none"> ▪ Integrated VoIP: Meeting participants will use computers with audio capability to communicate over the Internet rather than the telephone system. <p>Note</p> <ul style="list-style-type: none"> ▪ After you start the meeting, you must start an Integrated VoIP conference so that other participants can join the VoIP conference. ▪ Only participants whose computers meet the system requirements for Integrated VoIP can participate in the conference. <p>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.</p> <p>Personal Conference number: Available only if your site has the Personal Conference Number (PCN) option.</p> <p>Select the PCN account that you want to use for your meeting.</p> <p>For more information about PCN, see the My WebEx section in the documentation for your service.</p> <p>Other teleconference service: Specifies that the meeting includes a teleconference that another service provides, such as a third-party teleconferencing service or internal teleconferencing system, such as a PBX (private branch exchange).</p> <p>In the text box, type instructions for joining the teleconference.</p>
<p>Cisco Unified MeetingPlace audio conferencing</p>	<p>Available only if your site has Cisco Unified MeetingPlace Audio turned on.</p> <p>If you select this option, choose the type of conference:</p> <ul style="list-style-type: none"> ▪ Call-in teleconference: Select if you want customers to dial a number to join ▪ Call-back teleconference: Select if you want customers to type in a phone number and receive a call back from the conferencing service. <p>A participant must have a direct phone line to receive a call from the conferencing service. However, a participant without a direct phone line can join an audio conference by dialing a call-in number, which is always available in the meeting window.</p>
<p>Use VoIP Only</p>	<p>Specify that the meeting includes only Integrated VoIP, which allows meeting participants to use computers with</p>

Use this option...	To...
	audio capability to communicate over the Internet rather than the telephone system.
None	Specify that the meeting does not include either teleconference or Integrated VoIP.

Starting a One-Click Meeting on the Web

Before you start a One-Click Meeting from your WebEx service Web site, ensure that you set up One-Click settings. For details about setting up One-Click settings, see [Setting up your One-Click Meeting on the Web](#) (on page 43).

To start a One-Click Meeting from your WebEx service website:

- 1 Log in to your WebEx service website
- 2 Click My WebEx > Start One-Click Meeting.



link to start a One-Click meeting

Your meeting starts.

Starting a One-Click Meeting from Meeting Center

If your site includes Meeting Center, you can also start a One-Click Meeting from this specific service.

To start a One-Click Meeting from the Meeting Center service:

- 1 Log in to your WebEx service website and click Meeting Center.
- 2 On the left navigation bar, click Host a Meeting > One-Click Meeting.



link to start a One-Click meeting

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