Sign in to Webex Assistant

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

Before you begin

Make sure that Webex Productivity Tools is installed. Your administrator might have "pushed" this application to you. If not, you can download it from the **Downloads** page on your Webex site.

The Productivity Tools download page also displays instructions for signing in to Productivity Tools. Make note of the URL, because you need it to sign in to Webex Assistant.

Procedure

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

The Webex Assistant dialog box appears. If you previously signed in to Webex Assistant, the Webex site URL that you entered appears in the **Current site is** field.

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

- Enter your on-premises Cisco Webex Meetings Server site URL and select **Next**.

- Select **Sign in to Webex in the cloud** to sign in to a Cisco Webex site in the cloud, such as a Cisco Webex Meetings or a Webex centers site.

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

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

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

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

Step 5 (Optional) Set your sign-in preferences:

Check	To
Remember me	Have the system remember your sign-in credentials.
Automatically sign in	Remain signed in to Webex Assistant.

Step 6 Select **Sign In**.

Step 7 To determine which Webex site you are signed in to:

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

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

What to do next

Tip To sign out of Webex Assistant, right-click the Webex Assistant icon on the taskbar and select **Sign Out**.

Sign in to Webex Assistant Using Single Sign-On

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

Before you begin

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

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

Procedure

Step 1 Do one of the following:

- Select **Sign in using single sign-on**.

  If you don't see the option, enter the email address associated with your Webex account. Once the system verifies that you can use single sign-on, the option appears.

- Select **Sign in using corporate website**.

Step 2 Enter the URL for your Webex site.

You are redirected to your corporate website.

Step 3 Enter the required information to sign in on the page.

Sign in to Webex Assistant Using LDAP

When LDAP is enabled for your Cisco Webex Meetings Server site, you enter your company email address and password to sign in to Webex Assistant.

Procedure

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

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

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

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

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

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

Step 4 Enter your company email address and password.

Step 5 Select **Sign In**.

Step 6 To determine which Webex site you are singed in to:

a) Right-click the Webex ball icon in the system tray and choose **Webex Settings...**.

b) Select the Account tab.

The Account Information section displays the Webex site you are signed in to. Notice that you cannot change your password for a Cisco Webex Meetings Server site using LDAP sign-in.

Switch Sites

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

Before you begin

- To use the Switch Site feature, make sure you have an account on at least one Cisco Webex Meetings Server site and one Cisco Webex site in the cloud, or multiple accounts on Cisco Webex sites in the cloud. Note that your Webex accounts must be local accounts.

- The email address and password assigned for a Cisco Webex Meetings Server site must match at least one Cisco Webex site in the cloud.

- Switch Site is only available if your administrator has enabled the Cloud feature to allow users to sign in the Cisco Webex in the cloud accounts from Webex Productivity Tools.

Procedure

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

Note   If required, enter a password, and then select **Sign in**.

Start an Instant Meeting with Webex Assistant

Note   You must have a Host account to start a meeting.

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

Before you begin

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

- Sign in to Webex Assistant.

- On the Meetings tab of the **Webex Settings** dialog box, you can select the **Let me change the meeting topic and password when the meeting starts** check box if you want to override the topic (What) or password Meet Now settings for each instant meeting.

Procedure

Step 1   Right-click the Webex Assistant icon on the taskbar and select **Meet Now**.

Depending on your Webex Settings, a dialog box requesting meeting-specific information or the **Quick Start** page appears.

Step 2   (Optional) If you checked the **Let me change the meeting topic and password when the meeting starts** check box on the Webex Setting dialog box, enter a topic in the What field and a one-time meeting password for this instant meeting. Then select **Meet Now**.

The **Quick Start** page appears.

Step 3   There are two ways to invite people to join your meeting:

- The Meet Now function sends an email invitation for you to forward to invitees.
- Select **Invite & Remind** on the **Quick Start** page. On the Email tab, enter the email addresses for invitees, and then select **Send.**

Schedule a Meeting with Webex Assistant

Note   You must have a Host account to schedule a meeting.

Before you begin

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

- Sign in to Webex Assistant.

Procedure

Step 1   Right-click the Webex Assistant icon on the taskbar and select **Schedule a Meeting**.

A Microsoft Outlook appointment form opens. If you haven't installed Outlook, Webex will open the **schedule meeting** page.

Step 2   Enter your meeting details, such as the meeting subject, start and end times, and invitees.

Step 3   Select **Add Webex Meeting** from the Webex toolbar.

The **Webex Settings** dialog box appears.

Step 4   (Optional) If you want to include a meeting password, enter it in the **Meeting Information** section.

Step 5   If you want to grant other users the permission to start your meeting on your behalf, select the **Alternate Host** tab and select them from the list.

Note   If your organization relies on single sign-on (SSO) and your administrator changes the email address of your alternate host, you may get a message that the email address is not found. Until the new email address is propagated during the daily synchronization between Exchange, Outlook, and CWMS, you will not be able to designate an attendee with a modified email address as an alternate host or to schedule a meeting as a delegate.

Step 6   Select **OK** to close the **Webex Settings** dialog box.

Webex information displays in your Microsoft Outlook appointment form.

Step 7   Select **Send** to save your meeting information and send updates to invitees.

Schedule a Personal Conference Meeting with Webex Assistant

Note   You must have a Host account to schedule a meeting.

Before you begin

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

- Sign in to Webex Assistant.

- You cannot assign an Alternate Host for a Personal Conference meeting.

Procedure

Step 1   Right-click the Webex Assistant icon on the taskbar and select **Schedule a Meeting**.

A Microsoft Outlook appointment form opens. If you haven't installed Microsoft Outlook, Webex will open the **schedule meeting** page.

Step 2 Enter your meeting details, such as the meeting subject, start and end times, and invitees.

Step 3 Select **Add Webex Meeting** from the Webex toolbar.

The **Webex Settings** dialog box appears.

Step 4 On the Audio Conference tab, select either **Webex Audio** or a **Personal Conference account**.

Step 5 (Optional) If you select Personal Conferencing as your Audio Connection before you create a host PIN and Personal Conference account, the system asks you to do the following:

a) Select **View Audio Options** on the Personal Conference Account Required message box. If you select **Cancel**, the Audio Connection setting returns to **Webex Audio** and you can continue to schedule a Webex Audio meeting.

b) On the **My Account** page, go to the My Audio Connection Options section.

c) Select **Personal Conferencing**.

d) Enter a 4-digit host PIN.

e) Select **Save PIN and Generate Account**.

f) On the **Webex Settings** dialog box, select **Cancel** to close the dialog box.

g) Close the Microsoft Outlook appointment form.

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

Step 6 Select **OK** to close the **Webex Settings** dialog box.

Webex information displays in your Microsoft Outlook appointment form.

Step 7 Select **Send** to save your meeting information and send meeting invitations to invitees.

The scheduled meeting displays in your Outlook calendar and the list of meetings on your Cisco Webex site.

Install Webex Productivity Tools

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

- Intel Core2 Duo CPU 2.XXX GHz or AMD processor (2GB of RAM recommended)

- JavaScript and cookies enabled in the browser

- Supported operating systems and browsers

Note For the latest end-user system requirements, including supported operating systems and browsers, see the *Cisco Webex Meetings Server System Requirements* at http://www.cisco.com/c/en/us/support/conferencing/webex-meetings-server/products-installation-guides-list.html.

For the latest end-user system requirements, including supported operating systems and browsers, see the *Cisco Webex Meetings Server Planning Guide and System Requirements*.

Procedure

Step 1   Sign in to your Webex site.

Note   If you have sign-in issues, ensure that cookies are enabled in your browser. You cannot sign in to Cisco Webex if cookies are disabled.

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

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

Step 3   Under **Productivity Tools**, select **Download**.

The **File Download** dialog box appears.

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

Step 5   Run the installation file and follow the instructions.

After the installation completes, sign in to your Webex account when prompted, and check your settings in the **Webex Settings** dialog box.

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

Set up Webex Productivity Tools

Procedure

Step 1   Open the Webex Settings dialog box.

Step 2   Select the **Account** tab.

From this tab, you can do the following:

- Select **Change password** to update your Webex password.
- Select **Update Regional Preferences** to update your time zone, language, or locale on the **My Account** page. Select **Update** to save your changes, and then return to the Webex Settings dialog box.

Note   The **Time Zone** setting determines the time of a Webex meeting after the meeting is successfully scheduled. The **Locale** setting determines the format for the time, date, currency and phone numbers displayed on the Meetings page, and the email invitations and notification messages.

- Select **Update Regional Preferences** to update your time zone, language, or locale.

Note   The **Time Zone** setting is used to determine the time for a scheduled Webex meeting, and **Locale** localizes meeting details such as the format of the date and phone numbers.

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

Step 3   Select **Apply** to apply any changes.

Step 4   Select the **Meetings** tab.

Step 5   Select **Set meeting preferences** to define your default settings for meetings you start instantly from Microsoft Outlook.

Step 6   Select **Update** to save your changes, and then return to the Webex Settings dialog box.

Step 7   (Optional) If you want the option to change your meeting topic and password before your instant meeting starts, check the provided option.

Step 8   Select **OK** to close the Webex Settings dialog box.

Uninstall Webex Productivity Tools

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

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

Procedure

Step 1   Click **Start > Programs> Webex > Productivity Tools > Uninstall**.

Step 2   Click **Yes** to confirm that you want to uninstall Webex Productivity Tools.

Uninstall Webex Productivity Tools