WebEx Integration to Cisco Unified IP Phone

Users Guide

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Introducing WebEx Integration to Cisco Unified IP Phone

WebEx Integration to Cisco Unified IP Phone allows you to start a WebEx meeting instantly on your desktop while having a conversation on your Cisco Unified IP Phone. For example, you may want to start a WebEx meeting to share a document or presentation or to share an application.

WebEx Integration to Cisco Unified IP Phone	Task description:
	You can use the Cisco Unified IP Phone to: ▪ Start a WebEx meeting with you and the person you have called *More…* (on page 4) ▪ Invite additional attendees to join your WebEx meeting *More…* (on page 7) ▪ Join a WebEx Meeting *More…* (on page 8) Before you use the Cisco Unified IP Phone, you must: ▪ Install WebEx Productivity Tools More… ▪ Set options for WebEx Productivity Tools *More…* (on page 15)

Starting a WebEx meeting

While having a conversation on your Cisco Unified IP Phone, you can start a WebEx meeting instantly on your desktop. You may want to start a WebEx meeting to share documents and files, share applications, or share your desktop.

Note: You must have WebEx Productivity Tools installed and running on your computer and you must have specified Cisco IP Phone options in order to start a WebEx meeting and send meeting invitations on your Cisco Unified IP Phone. For more details about installing WebEx Productivity Tools, see Installing and Setting Up WebEx Productivity Tools and *About the Cisco IP Phone tab* (on page 22).

To start a WebEx meeting from your Cisco Unified IP phone:

1   Call another user on your Cisco Unified IP Phone.

2   On your Cisco Unified IP Phone, click the **WebEx** button.

A message appears on your Cisco Unified IP Phone screen, telling you that a WebEx meeting is starting on your computer.
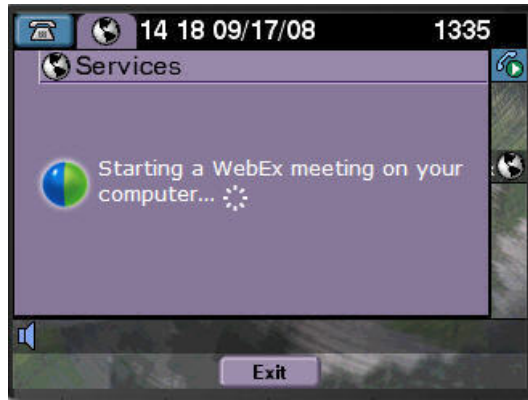
At the same time, a message appears on your computer desktop, telling you that a WebEx meeting is starting.
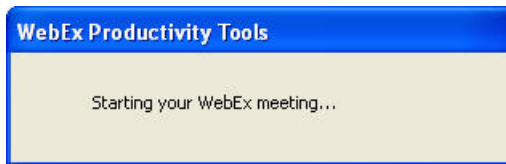
The Meeting Manager opens on your computer, and the meeting starts. A confirmation message appears on your Cisco Unified IP Phone.

The other caller in your Cisco Unified IP Phone conference is automatically sent a message on their Cisco Unified IP Phone, asking them to join your WebEx meeting. When the other caller has joined the meeting successfully, a confirmation message appears on your Cisco Unified IP Phone.

> **Note:**
> - If an attendee is using a standard telephone and not a Cisco Unified IP Phone, or the attendee is using a Cisco Unified IP Phone but does not have WebEx Productivity Tools installed, you will receive a notification that you cannot invite the attendee using the Cisco Unified IP Phone, and will be given the option to invite them by email instead.
> - If you are in a Cisco Unified IP Phone conference with multiple callers and you click the WebEx button, all of the callers are automatically sent invitations to the WebEx meeting and you receive confirmations when each attendee joins the meeting.

1   When you want to end the meeting, in the Meeting Manager on your desktop, choose **File** > **End Meeting**.

On your Cisco Unified IP Phone, a message appears indicating the meeting has ended.
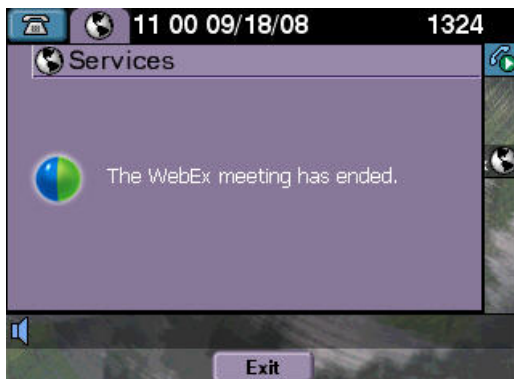
Although the WebEx meeting has ended, you can still continue with your conference on the Cisco Unified IP Phone. You could also start another WebEx meeting again within the same phone conference.

Inviting additional attendees to your meeting

If you are having a conversation with one person on your Cisco Unified IP Phone have have started a WebEx meeting with that person, you can invite additional people to join your WebEx meeting.

Note: You must have WebEx Productivity Tools installed on your computer and you must have specified Cisco Unified IP Phone options in order to start a WebEx meeting and send meeting invitations on your Cisco Unified IP Phone. For more details about installing WebEx Productivity Tools, see Installing and Setting Up WebEx Productivity Tools and *About the Cisco IP Phone tab* (on page 22).

To invite additional attendees to a meeting you started:

1 Start a WebEx meeting with one caller as an attendee. For more details, see *Starting a WebEx meeting* (on page 4).

2 Call one or more contacts from your Cisco Unified IP Phone and add them to your conference.

   A message appears on your Cisco Unified IP Phone, asking you if you want to invite the additional people to your WebEx meeting.

3 Click **Accept**.

   The other callers in your Cisco Unified IP Phone conference are sent a message on their Cisco Unified IP Phones, asking them to join your WebEx meeting. When each attendee has joined the meeting successfully, a confirmation message appears on your Cisco Unified IP Phone.
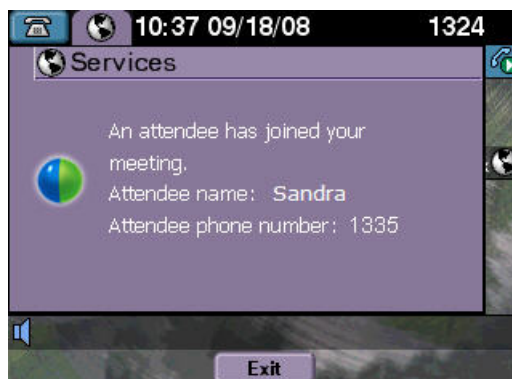
> **Note:** If an attendee is using a standard telephone and not a Cisco Unified IP Phone, or the attendee is using a Cisco Unified IP Phone but does not have WebEx Productivity Tools installed, you will receive a notification that you cannot invite the attendee using the Cisco Unified IP Phone, and will be given the option to invite them by email instead.

Joining a WebEx meeting

When you are communicating with another person on a Cisco Unified IP Phone, and the other person decides to start a WebEx meeting from their Cisco Unified IP Phone, you are automatically sent an invitation to join their WebEx meeting.

> **Note:** You must have WebEx Productivity Tools installed on your computer and you must have specified Cisco Unified IP Phone options in order to receive meeting invitations on your Cisco Unified IP Phone. For more details about installing WebEx Productivity Tools, see Installing and Setting Up WebEx Productivity Tools and *About the Cisco IP Phone tab* (on page 22).

To join a WebEx meeting from your Cisco Unified IP Phone:

1   On your Cisco Unified IP Phone, view the invitation from the host to join a meeting.

2 Click **Accept** to join the meeting.

On your Cisco Unified IP Phone, the following message appears, indicating you have joined the meeting.

At the same time, the WebEx meeting starts on your computer, and lists you as an attendee.

Note:
- If you are already attending a WebEx meeting, you cannot click the WebEx button to start another meeting.
- If you want to include another attendee in the meeting, you can call an additional person on your Cisco Unified IP Phone. The meeting host will then be asked if they want to invite the additional person to the WebEx meeting.

When the host ends the WebEx meeting, a message appears on your Cisco Unified IP Phone, confirming that the meeting has ended.

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Installing and Setting Up WebEx Productivity Tools

You can install WebEx Productivity Tools to start or join meetings instantly using your Cisco Unified IP Phone 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 select options for the WebEx Integration with Cisco IP Phone.

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

- Install WebEx Productivity Tools *More…* (on page 12)

- Open the WebEx Settings dialog box *More…* (on page 14)

- Set options for WebEx Productivity Tools *More…* (on page 15)

- Uninstall WebEx Productivity Tools *More…* (on page 23)

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 15).

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 2.0 or 3.0

- 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 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 **.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 15).

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 **.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 15).

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 Site Administrator Options for WebEx Integration to Cisco IP Phone

Your site administrator must specify the following options on the Productivity Tools site settings page in Site Administration so you can use the WebEx Integration to Cisco IP Phone:

1   On the Productivity Tools page of Site Administration, under **Integrations**, turn on the **Cisco IP Phone** option.

2   Click **Configure Cisco Unified Application Server.**

3   In the Cisco Unified Application Server dialog box, specify the following information:
   - **Server address:** one or more server names, separated by commas.
   - **Administrator email:** the email address of the administrator for the CUAE server.
   - **Password:** the CUAE server password.

4   Click **Register**.

The current WebEx service site will be registered to be used with the specified CUAE server. An email will be sent to the CUAE server administrator at the address listed to provide information for configuring the WebEx Provider for the CUAE server. For more information, refer to the *WebEx Integration to Cisco Unified IP Phone Installation Guide*.

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.

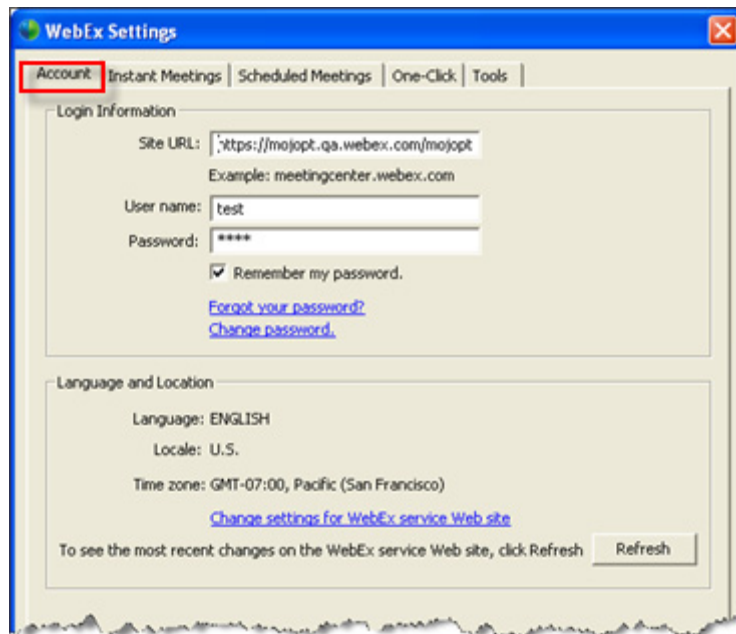**To open the WebEx Settings dialog box from instant messengers:**

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 14).

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 *About the Account tab* (on page 19).

3   Click **Apply**.

4   Click the **Instant Meetings** tab.
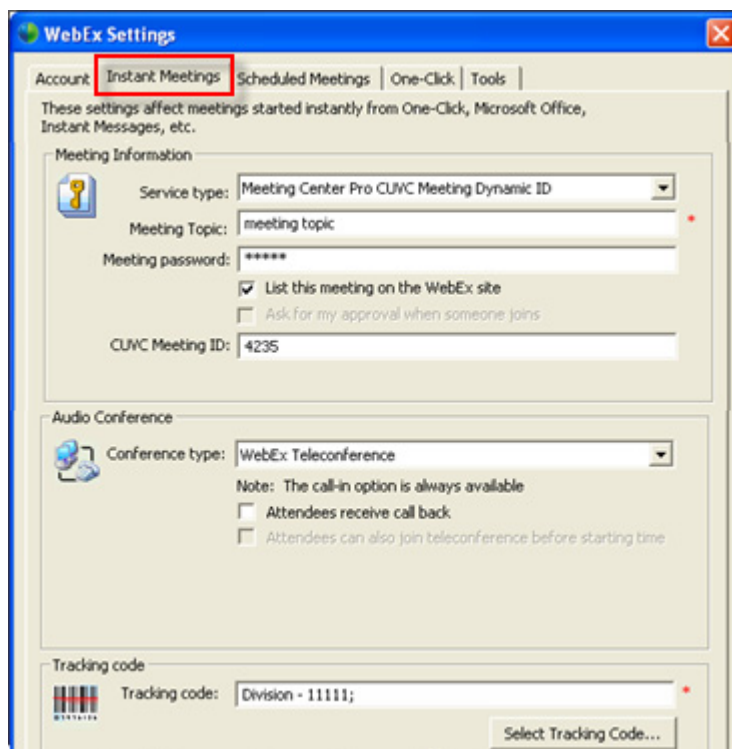
5 Specify options for meetings started instantly from the Cisco Unified IP Phone. For more details, see *About the Instant Meetings tab* (on page 20).

6 Click the **Cisco IP Phone** tab.

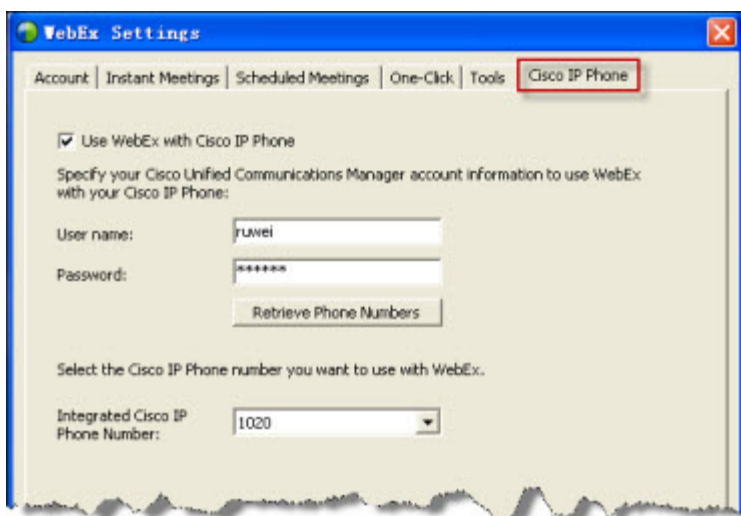**7** Specify your Cisco Unified IP Phone information. For more details, see *About the Cisco IP Phone tab* (on page 22).

8 Click **OK**.

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 following tabs in the WebEx Settings dialog box contains the following apply to the WebEx Integration to Cisco Unified IP Phone:

- **Account** tab *More…* (on page 19)

- **Instant Meeting** tab *More…* (on page 20)

- **Cisco IP Phone** tab *More…* (on page 22)

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 s 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	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.
	
	- **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:
	
	  - **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.
	
	  - **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 the WebEx audio conference before starting time.
	
	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.
	
	- **MeetingPlace Audio Conferencing:** Specifies that the meeting includes an integrated Meeting Place audio conference. If you select this option, the following options are also available:
	
	  - **Call-in numbers:** Shows the available MeetingPlace call-in numbers for your meeting.
	
	  - **MeetingPlace meeting ID:** Shows the MeetingPlace meeting ID number.
	
	  - **Attendees receive call back:** Select if the meeting includes an integrated call-back MeetingPlace audio conference, in which participants provide their phone numbers and receive a call back.
	
	Note: The **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.

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.
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.

About the Cisco IP Phone tab

If you are using the Cisco IP Phone integration, these options allow you to specify your Cisco Unified Communications Manager account information.

Use this option...	To...
Use WebEx with Cisco IP Phone	Allows you to start a WebEx meeting by pressing the **WebEx** button on your Cisco Unified IP Phone.
User name	Specify your user name for your Cisco Unified Communications Manager account. This user name is different from your WebEx account user name.
Password	Specify your password for your Cisco Unified Communications Manager account.
Retrieve Phone Numbers	Verify your Cisco Unified Communications Manager account and. Clicking this button displays any phone numbers associated with the account in the **Phone Number** list.
	Note: If you receive an error message after clicking this button, you may need to contact your Cisco Unified Communications Manager administrator to make sure your account and phone number information is correct.
Integrated Cisco IP Phone Number	The Cisco Unified IP Phone number to be used with WebEx on this computer. If you have more than one Cisco Unified IP Phone number associated with your account, you can select a Cisco Unified IP Phone number from the list.

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 15).

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