



WebEx Integration to Outlook for the Mac

User Guide

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Introducing WebEx Integration to Outlook for the Mac

The WebEx Integration to Outlook allows you to start and schedule WebEx meetings from within Microsoft Outlook:

- [About WebEx Integration to Outlook for the Mac](#) (on page 5)
- [About the Integration to Outlook Options](#) (on page 6)

About WebEx Integration to Outlook for the Mac

WebEx Integration to Outlook provides a convenient way for you to schedule or start WebEx-only meetings, CMR Hybrid (WebEx-enabled TelePresence) meetings, or WebEx Personal Conference meetings using Microsoft Outlook. Using Integration to Outlook, you can perform these activities without the need to use your WebEx service Web site—that is, the site on which you normally schedule and join your online meetings.

WebEx Integration to Outlook is part of WebEx Productivity Tools. WebEx Productivity Tools are automatically installed on your computer when you log in to your WebEx service Web site, and are automatically updated when new versions are available. You can also install Productivity Tools manually. See [Install WebEx Productivity Tools](#) (on page 33).

Once WebEx Productivity Tools are installed, WebEx integration options appear in Microsoft Outlook, allowing you to quickly schedule a WebEx meeting.

Note: Before you use WebEx Integration to Outlook, ensure that:

- You have a user account on your WebEx site.
- The Integration to Outlook option for WebEx Productivity Tools is available on your WebEx service Web site.
- Your computer is connected to the Internet.
- You are familiar with Microsoft Outlook.

When scheduling a meeting, you can invite attendees using any of your Outlook address lists, including the Global Address List, Personal Address List, or Contacts folder. Attendees whom you invite to a meeting do not need to use Integration to Outlook to join the meeting.

To provide security for your meetings, Integration to Outlook uses 128-bit SSL (Secure Sockets Layer) encryption for all data it sends to and retrieves from your WebEx service Web site.

WebEx Integration to Outlook also provides the following:

- quick access to My WebEx on your WebEx service Web site, which includes your personal list of meetings, user profile, and other account options
- a feature for starting an instant meeting using Meet Now (not available for all WebEx service sites)
- templates for meeting invitations

About the Integration to Outlook Options

After the WebEx Productivity Tools are installed, the WebEx integration toolbar appears in the Microsoft Outlook window. You can click and drag the lines to "float out" the WebEx toolbar, as you can with the Microsoft Outlook toolbars. Selecting the X button closes the floating toolbar. To regain the toolbar, right-click any Microsoft Outlook toolbar, and then choose WebEx Productivity Tools.

The following describes the WebEx Integration to Outlook toolbar commands.

- **Meet Now**—Starts an instant meeting. This is a meeting that you can start at any time, without having to schedule the meeting in advance. For details, refer to the *Meet Now User's Guide* on your WebEx service Web site. You can specify options for instant meetings on the Meet Now Settings tab of the WebEx Settings dialog box.

- **Schedule WebEx Meeting**—Opens the Outlook Appointment window and adds a WebEx-only meeting. For more information, see [Schedule a WebEx-only meeting in Microsoft Outlook](#) (on page 11).
- **Schedule Personal Conference Meeting** or **Schedule Audio-Only Meeting**—Opens the Outlook Appointment window and schedules a Personal Conference meeting, which includes an audio portion and an optional online portion, if you have WebEx Audio, or an audio-only meeting if you have telephony service provider (TSP) audio. For more information, see [Schedule a Personal Conference or Audio-Only meeting](#) (on page 22).
- **Schedule WebEx and TelePresence Meeting**—Opens the Outlook Appointment window and schedules a CMR Hybrid (WebEx-enabled TelePresence) meeting. This option is available only if your site and account are enabled for the CMR Hybrid integration. For more information, see [Schedule a CMR Hybrid \(WebEx-enabled TelePresence\) meeting in Microsoft Outlook](#) (on page 14) .
 - **Preferences**—Opens a dialog box that allows you to set WebEx preferences.
 - **About**—Lets you view the version number and license and patent information about WebEx Integration to Outlook.

Meet Now with WebEx

You can meet instantly with WebEx:

- [Start an instant meeting from Microsoft Outlook](#) (on page 9)
- [Start an instant meeting from the toolbar](#) (on page 10)

Start an instant meeting from Microsoft Outlook

- 1 Open Microsoft Outlook.
- 2 Select the WebEx ball to see the WebEx menu.



- 3 Select **Meet Now**.

Note:

- By default, instant meetings you start with **Meet Now** happen in your Personal Room. To change your default settings, go to your WebEx site and select **My WebEx > Preferences** and specify options for the "**Meet Now**" **Settings** and **Audio sections**.
- Instant meetings and Personal Room meetings are WebEx-only meetings. CMR Hybrid meetings do not support instant meetings or Personal Room meetings.

Start an instant meeting from the toolbar

You can also start an instant meeting from the Mac toolbar

- 1 Select the WebEx ball icon on the Mac toolbar.
- 2 Select **Meet Now** from the menu.



Note:

- By default, instant meetings you start with **Meet Now** happen in your Personal Room. To change your default settings, go to your WebEx site and select **My WebEx > Preferences** and specify options for the "**Meet Now**" **Settings** and **Audio sections**.
- Instant meetings and Personal Room meetings are WebEx-only meetings. CMR Hybrid meetings do not support instant meetings or Personal Room meetings.

Schedule Meetings

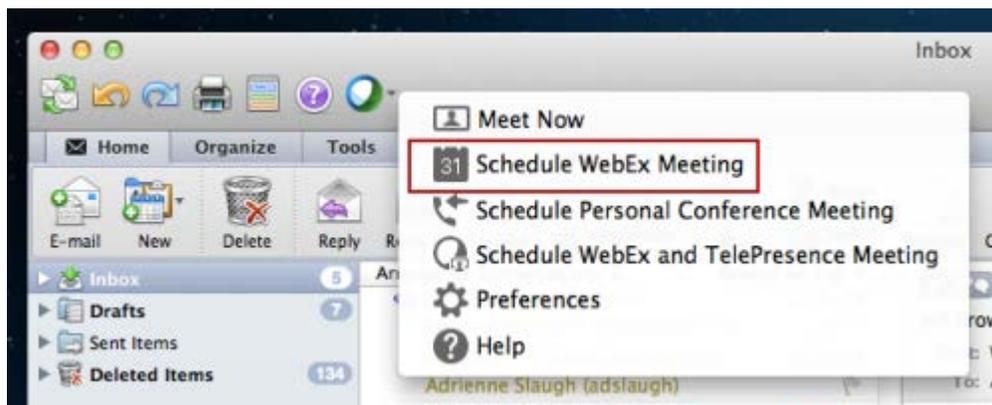
You can schedule WebEx meetings in Microsoft Outlook:

- [Schedule a WebEx-only meeting in Microsoft Outlook](#) (on page 11)
- [Schedule a CMR Hybrid](#) (on page 14)
- [Schedule a Personal Conference or Audio-Only meeting](#) (on page 22)

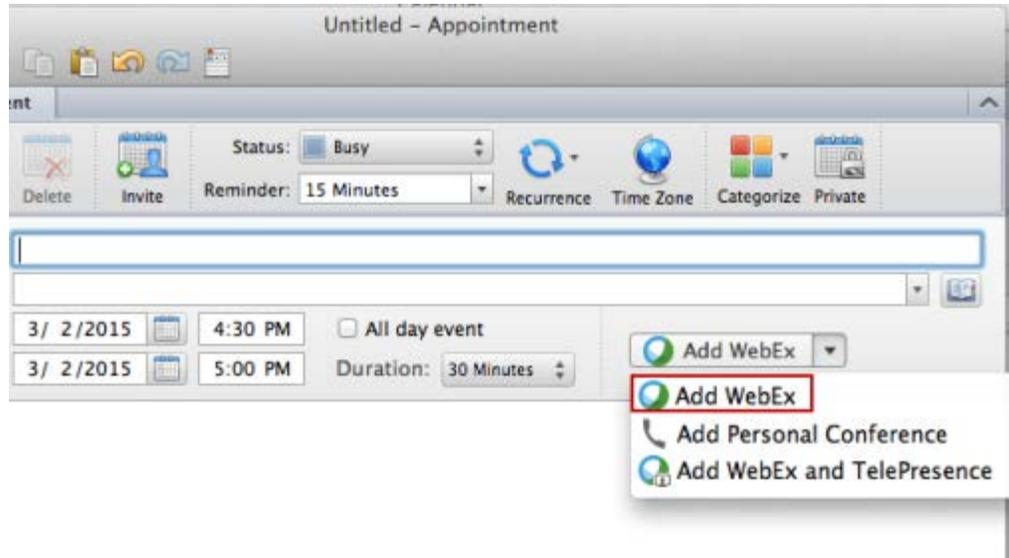
Schedule a WebEx-only meeting in Microsoft Outlook

To schedule a CMR Hybrid (WebEx-enabled TelePresence) meeting:

- 1 In the WebEx menu in the Outlook window, select **Schedule WebEx Meeting**.



Alternatively, you can open a new meeting item and select the **Add WebEx** button from the toolbar.



- 2 Open a new meeting request in Microsoft Outlook and then specify information and settings for the meeting.
 - Specify general meeting information, such as the subject and start and end time.

Note: In any meeting invitations that you send from Microsoft Outlook, the meeting's start time appears in the time zone that is set on your computer, not in your preferences for your WebEx service.

On your WebEx site, all meeting times appear in the time zone that you set in your preferences, regardless of the time zone that is set on your computer.

- If you want to create a recurring meeting, select **Recurrence** and then specify recurrence options. For details, see [Recurrence pattern support in WebEx integration to Outlook for Mac](#) (on page 19).
 - Specify other Microsoft Outlook options as needed, such as a meeting reminder.
- 3 Select **Add WebEx** from the WebEx toolbar within Outlook to specify meeting settings.
 - 4 If you are asked for your WebEx account information, enter that information and then select **OK**.

- 5 In the WebEx settings dialog box, specify additional options for your WebEx meeting:
 - a) Select meeting template to use your predefined settings for that template.
 - b) If needed, specify a meeting password.
 - c) Optional. In the **Alternate host** box, select one or more alternate hosts who can start and run the meeting until you join it.

Note:

- An alternate host can start, manage, and record the meeting if the host has not joined it yet. An alternate host must have a user account on your WebEx site. If you specify more than one alternate host, the first alternate host to join the meeting will have control of the meeting. If an alternate host record
- An alternate host must be one of the people you have added to the meeting as an attendee, and must have a user account on your Meeting Center Web site.
- If you specify more than one alternate host, the first alternate host to join the meeting will have control of the meeting.
- Although an alternate host can record the meeting, the original meeting host still owns the recording and receives the notification when the recording is ready.

- a) If you want to set more options, select **Show Advanced Settings** :
 - Make sure you have the correct service type or meeting type selected, such as a standard meeting, event, or training session meeting type, or a Personal Conference meeting type.
 - Verify or select audio connection options.
 - If needed, set options for registration.
 - b) Select **OK**.
- 6 Invite people to your meeting by selecting **Invite** or by selecting **Scheduling Assistant > Add Attendees** and then selecting their names or email addresses in any of your Microsoft Outlook contacts lists.

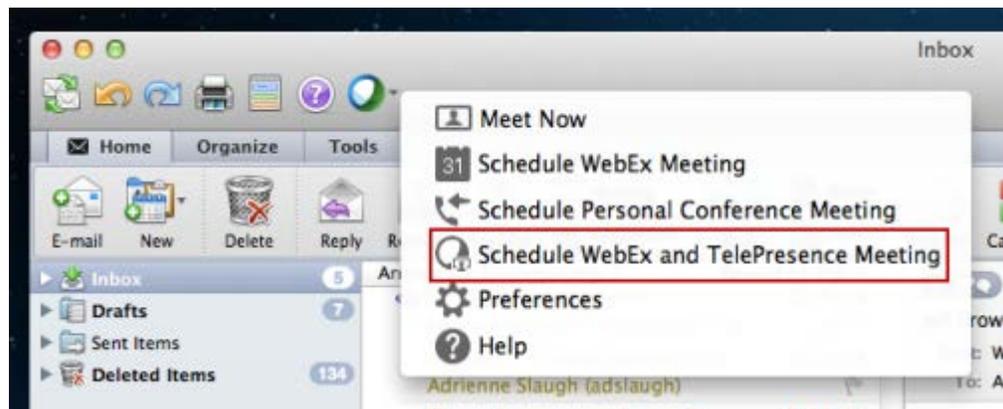
After you invite someone to a scheduled meeting, he or she receives an invitation email message. The email message includes information about the meeting—including its password—and a link that he or she can select to join the meeting.
 - 7 When you are finished making changes, select **Save and Close** or **Send**.

Schedule a CMR Hybrid (WebEx-enabled TelePresence) meeting in Microsoft Outlook

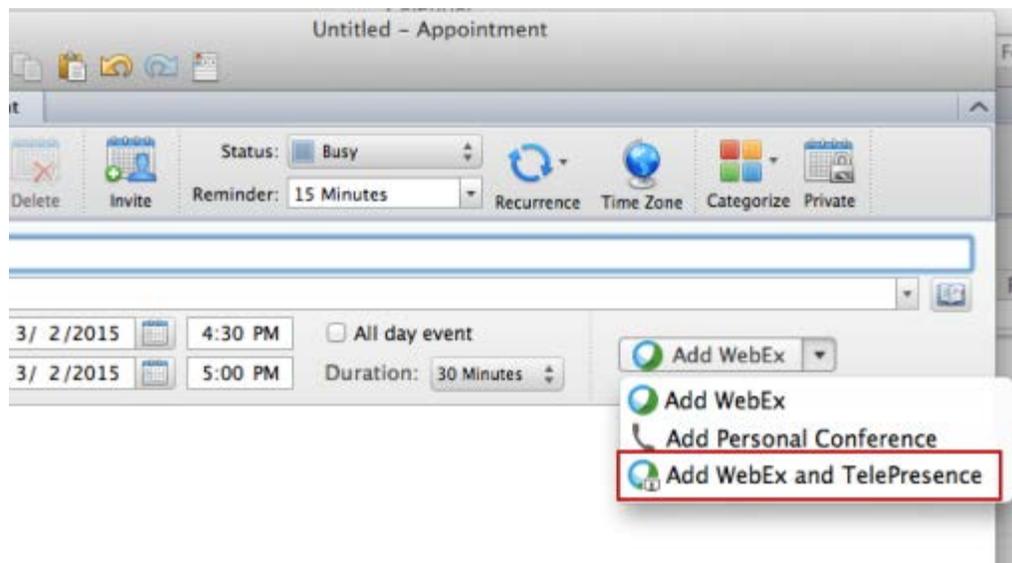
Using the integration to Outlook, you can schedule a CMR Hybrid (WebEx-enabled TelePresence) meeting that allows people to join using WebEx Meeting Center or TelePresence.

To schedule a CMR Hybrid (WebEx-enabled TelePresence) meeting:

- 1 In the WebEx menu in the Outlook window, select **Schedule WebEx and TelePresence Meeting**.



Alternatively, you can open a new meeting item and select the Add WebEx and TelePresence button from the toolbar.



- 2 In the Meeting Options panel, specify the WebEx and TelePresence options for your CMR Hybrid meeting:

The screenshot shows two configuration panels. The top panel is for WebEx, featuring a logo, an 'ON' toggle, a 'Meeting password' field with '111111111111', an 'Exclude password from email invitation' checkbox, a 'Service type' dropdown set to 'Meeting Center TelePresence', and an 'Audio connection' dropdown set to 'Teleconferencing Service - Account 1'. Below these are call-in details: 'Call-in number: 1-4405804702', 'Call-in toll-free number: 1-4405804701', 'Host access code: 98767897', and 'Attendee access code: 09878909'. The 'Registration' section has two unchecked checkboxes: 'Require invitee registration' and 'Automatically accept all registration requests'. A 'Hide' link is at the bottom right. The bottom panel is for TelePresence, with a logo, an 'ON' toggle, a 'TelePresence room' field with the placeholder 'Enter TelePresence room name', and an 'Add video call-in participants' field with '0'. An 'Advanced TelePresence setting' link is at the bottom right.

- Check **Allow people to join using WebEx**.
This option is always unchecked by default. You need to check it each time you schedule a meeting and want to add WebEx to it.
- Select **Add TelePresence Rooms**.
The systems you select are added to the To and Location boxes in the meeting window. .
- Enter a meeting password for WebEx invitees. If a meeting password is required by your site, an asterisk appears next to the box.
Note that a WebEx meeting password is different from the PIN you can specify for a TelePresence meeting.

- Optional. Check **Exclude password from email invitation** to make your meeting more secure.
- Optional. In the **Alternate host** box, select one or more alternate hosts who can start and run the meeting until you join it.

Note:

- An alternate host can start, manage, and record the meeting if the host has not joined it yet. An alternate host must have a user account on your WebEx site. If you specify more than one alternate host, the first alternate host to join the meeting will have control of the meeting. If an alternate host records
- An alternate host must have a user account on your Meeting Center Web site.
- If you specify more than one alternate host, the first alternate host to join the meeting will have control of the meeting.
- Although an alternate host can record the meeting, the original meeting host still owns the recording and receives the notification when the recording is ready.

- Optional. Select **Advanced WebEx Settings** to specify additional details such as audio connection and registration. .
- Optional. Enter the number of additional video call-in participants that can call in to the meeting in **Add video call-in participants**.

This option lets you reserve capacity for more people to join using personal video conferencing systems such as the Cisco TelePresence EX Series and devices running Cisco Jabber Video applications. The number you enter excludes any TelePresence systems you add in the **To** and **Location** boxes. You should be aware of the recommended number for your site and do not exceed that recommended limit.

- Optional. Select **Advanced Telepresence Settings** to specify additional details such as call-in and call-out settings.
- 3 Add invitees to the WebEx meeting in the To box of your Outlook meeting.
 - 4 Enter the topic of the meeting in the Subject box of your Outlook meeting.
 - 5 Specify the meeting start and end times and, if necessary, recurrence options.

Note:

- Although other types of WebEx meetings provide different email invitations for the host and the attendees, when you schedule a CMR Hybrid meeting, you and the attendees all receive the same email invitation. Your email invitation does not contain any confidential host information, such as the host key or host access code. If you need to see the host key or host access code, select the link in your email invitation to go to the meeting information page on your WebEx site, and sign in to see your host details.
- The CMR Hybrid integration does not support exceptions to a recurring meeting series; in other words, it does not support changes to an individual occurrence of the meeting series.
- If you schedule an alternate host, he or she can start the meeting, manage the meeting, and can record the meeting; however, the meeting recording will be sent to you, the original host.
- When scheduling meetings, do not schedule more than two meetings for the same time period, because you cannot be the host of two meetings that are active at the same time. Even if you allow alternate hosts to start your meetings without you, you are still considered to be the host of the meetings that you schedule, unless you are a delegate of a host. For more information about delegates, see [Assign a delegate to schedule meetings for you](#) (on page 25).

What is a CMR Hybrid meeting with WebEx and TelePresence?

WebEx Productivity Tools with TelePresence Collaboration Meeting Rooms (CMR) Hybrid integration enables Cisco WebEx Meeting Center and Cisco TelePresence to work together in a joint meeting.

During a CMR Hybrid meeting, you can see live video of both WebEx and TelePresence participants.

The participant list in the WebEx meeting displays the TelePresence participants in one aggregate label, "TelePresence systems." The participant list on the TelePresence system displays each individual WebEx participant.

If a TelePresence participant connects the VGA or HDMI cable to a laptop and starts screen sharing, all participants, including the WebEx participants, can see the shared content. If a WebEx presenter starts sharing, all participants, including the telepresence participants, can see the shared content.

You can record video, audio, sharing, chat, and polling for CMR Hybrid (WebEx-enabled TelePresence) meetings. Just press **Record** as you normally would in your WebEx meeting and your recordings will appear in your My Files > My Recorded Meetings list in the My WebEx section. CMR Hybrid meeting recordings will be in MP4 format. Video will be recorded at 360 p.

Recurrence pattern support in WebEx integration to Outlook for Mac

The following table shows how Outlook recurrence patterns are handled in WebEx:

Note: The CMR Hybrid integration does not support exceptions to a recurring meeting series; in other words, it does not support changes to an individual occurrence of the meeting series. Any changes you make to a CMR Hybrid meeting series should apply to the entire series.

WebEx-only meetings, however, do support exceptions to a recurring meeting series.

WebEx Meetings

Type	Outlook Option	Converted to WebEx Meeting Option
Daily	Every [X] days	Every [X] days
	Every weekday	Every weekday
Weekly	Every [x] weeks on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday]	<p><i>For Event Center events and Training Center training sessions:</i></p> <p>Every week on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday]</p> <p>If you schedule a meeting that repeats every X week, where X is greater than 1, in Microsoft Outlook, the meeting will be scheduled in Outlook as you specified, but will appear as a weekly meeting on your WebEx site.</p> <p>The week start always points to the default value Sunday. Customization is not supported, so if you change the week start to a different day, the week</p>

Type	Outlook Option	Converted to WebEx Meeting Option
		start will not be synchronized with the WebEx site.
Monthly	Day [x] of every [y] months	Day [x] of every [y] months
	The [first, second, third, fourth, last] day of every month	Not supported
	The [first, second, third, fourth, last] weekday or weekend day	Not supported
	The [first, second, third, fourth, last] Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of every [x] months	The [first, second, third, fourth, last] Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of every [x] months
Yearly	[January....December] [1,....31], Every n (n> 1) year	[January....December] [1,....31], Every n (n> 1) year
	[first, second,third, fourth, last] [day,weekday,weekend day] of [January....December]	Not supported.
	[first, second, third, fourth, last] [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of [January....December] Every n(n>1) year	[first, second, third, fourth, last] [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of [January....December] Every n(n>1) year
End date	No end date.	No end date.
	End after [x] occurrences.	End after [x] occurrences.
	End by [date input]	End by [date input]

WebEx Personal Conference Meetings

Type	Outlook Option	Converted to WebEx Personal Conference Meeting Option
Daily	Every [X] days	Every day
	Every weekday	Every weekday
Weekly	Every [x] weeks on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday]	Every [x] weeks on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday]
Monthly	Day [x] of every [y] months	Day [x] of every month.

Type	Outlook Option	Converted to WebEx Personal Conference Meeting Option
	The [first, second, third, fourth, last] day of every month	Day [1,2,3,4,31] of every month.
	The [first, second, third, fourth, last] weekday or weekend day	Not supported.
	The [first, second, third, fourth, last] Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of every [x] months	The [first, second, third, fourth, last] Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of every [x] months
Yearly	Every [January....December] [1,....31]	Not supported.
	[first, second,third, fourth, last] [day,weekday,weekend day] of [January....December]	Not supported.
	[first, second,third, fourth, last] [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday] of [January....December]	Not supported.
End date	No end date.	If time period is longer than one year, it is converted to one year.
	End after [x] occurrences.	If time period is longer than one year, it is converted to one year.
	End by [date input]	If time period is longer than one year, it is converted to one year.

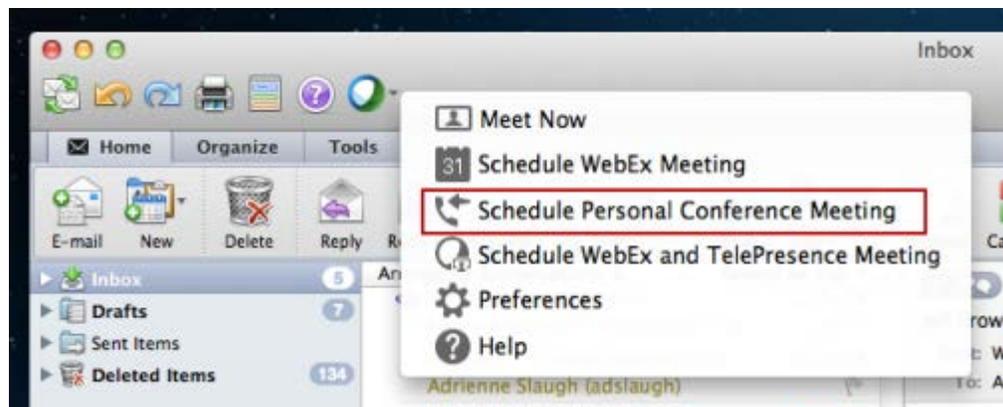
Note: If you use WebEx Integration to Outlook to modify meeting settings for a recurring meeting, you must apply the changes to the entire series of the meeting. For example, if you apply the changes to just a single occurrence of the meeting, the changes will show only in Outlook, not on your WebEx site.

Schedule a Personal Conference or Audio-Only meeting

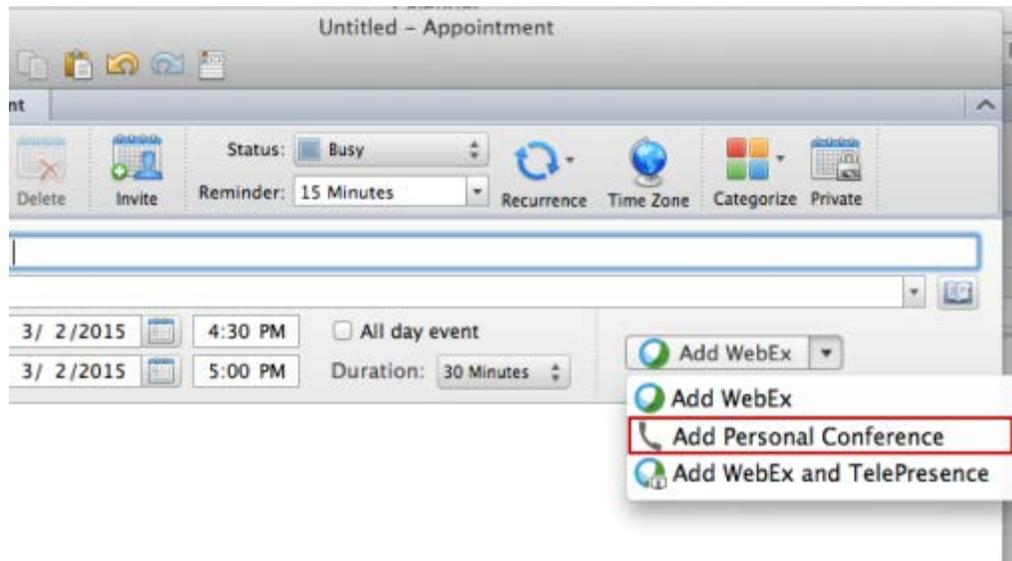
Using the integration to Outlook, you can schedule a WebEx Personal Conference meeting, if your site uses WebEx Audio, or an Audio-Only meeting, if your site uses telephony service provider (TSP) audio, without having to go to your WebEx site. With a Personal Conference, you start the audio portion first, but an online portion is always available to join, if needed.

To schedule a Personal Conference or Audio Only meeting:

- 1 In the WebEx menu in the Outlook window, select **Schedule Personal Conference Meeting**, or if you use TSP audio, select **Schedule Audio-Only Meeting**.



Alternatively, you can open a new meeting item and select the **Add Personal Conference** or **Add Audio Only** button from the toolbar.



- 2 In the WebEx Settings dialog box, specify these options:
 - In the Audio & Tracking Tab, for **Audio connection type**, select one of the following:
 - If you are using WebEx Audio, select **Personal Conferencing**, and then select the Personal Conferencing account you want to use. If you have not specified a Personal Conferencing account yet, you will need to generate one.
 - If you are using telephony service provider (TSP) audio, select Teleconferencing Service, and then select the Teleconferencing Service account you want to use.
 - (Optional) Enter a meeting password for WebEx invitees for the online portion of the Personal Conference. If a meeting password is required by your site, an asterisk appears next to the box.

Note that a WebEx meeting password is different from the PIN you can specify for a TelePresence meeting. To learn more about PIN, see About advanced TelePresence settings.
 - Optional. **Check Exclude password from email invitation** to make the online portion of your meeting more secure.
 - Optional. Select **Select Alternate Host** to select one or more alternate hosts who can start and run the meeting until you join it.

Note:

- An alternate host can start, manage, and record the meeting if the host has not joined it yet. An alternate host must have a user account on your WebEx site. If you specify more than one alternate host, the first alternate host to join the meeting will have control of the meeting. If an alternate host records
- An alternate host must have a user account on your Meeting Center Web site.
- If you specify more than one alternate host, the first alternate host to join the meeting will have control of the meeting.
- Although an alternate host can record the meeting, the original meeting host still owns the recording and receives the notification when the recording is ready.

- Optional. **Select Advanced WebEx Settings** to specify additional details such as audio connection and registration for the online portion of your Personal Conference meeting.

- 3 Add invitees in the **To** box in the Outlook meeting.
- 4 Enter the topic of the meeting in the **Subject** box in the Outlook meeting.
- 5 Specify the meeting start and end times and, if necessary, recurrence options.
- 6 Select **Send**.

Note:

- When you schedule a Personal Conference or Audio-Only meeting, the meeting invitation that you receive as the host contains the host access code that you can use to start the audio portion of your meeting. For Personal Conference meetings, it also contains the host key, which you can use to reclaim host privileges.
- For some telephony service provider (TSP) audio accounts, if you schedule two adjacent CMR Hybrid meetings, with the second one scheduled to start immediately after the first one ends, and if the TelePresence scheduling system automatically extends the first meeting past the scheduled end, the second meeting will end automatically because the same TSP audio account host access code cannot be used for both meetings at the same time. To work around this problem, you can set up two different TSP audio accounts with different host access codes, and use one account for the first meeting and the other account for the second meeting. Another option is to ask your administrator to turn off the option for the TelePresence system that automatically extends the meeting.

Assign a delegate to schedule meetings for you

The integration to Outlook allows you to assign a delegate to schedule or edit meetings on your behalf.

For example, if you need to host WebEx meetings on a regular basis, you can give your assistant permission to schedule meetings for you.

After being given permission, your delegate can schedule, edit, cancel, and start meetings for you.

- On your WebEx site, give the delegate scheduling permission. For details, see [Assign a delegate on your WebEx site](#) (on page 25).
- In Microsoft Outlook, share your calendar with the delegate. For details, see [Assign a delegate in Microsoft Outlook](#) (on page 26).

Important:

- A meeting that your delegate scheduled will appear in your calendar. If you want to edit it, you must have WebEx Integration to Outlook 3.1 or a later version installed on your computer.
- At any time, you can remove scheduling permission from your delegate.

Assign a delegate on your WebEx site

To assign a delegate, you give him or her scheduling permission on the My WebEx My Profile page in your WebEx site. You can go to the page directly from Microsoft Outlook.

If you want to go to the My Profile page without using Microsoft Outlook, you can log in to your WebEx service Web site, and then select **My WebEx > Preferences**.

Besides giving scheduling permission on your WebEx service Web site, you must also share your calendar with the delegate in Microsoft Outlook. For details, see [Assign a delegate in Microsoft Outlook](#) (on page 26).

Important:

- If you do not see the option to assign a delegate on your WebEx service Web site, ensure that your site administrator turns on the feature.
- Your delegate must also have a WebEx host account on your WebEx service Web site.
- The email addresses for both your and the delegates' accounts on your WebEx service Web site must match those in Microsoft Outlook.

To assign a delegate on your WebEx site:

- 1 Go to your WebEx site.
- 2 Select **My WebEx**.
- 3 Select **Preferences**.
- 4 Expand the **Scheduling Options** category.
- 5 Under "Scheduling permission," select **Select host**.
- 6 In the Select Hosts window, select the email address of the delegate, and then select **Add > OK**.
- 7 Select **Save**.

Assign a delegate in Microsoft Outlook

To assign a delegate, you share your calendar with him or her in Microsoft Outlook.

Besides sharing your calendar in Microsoft Outlook, you must also give scheduling permission on your WebEx service Web site. For details, see [Assign a delegate on your WebEx site](#) (on page 25).

Important:

- Ensure that the calendar you share does not reside in your personal folder in Microsoft Outlook. Your delegate can access your calendar only if it resides in a public folder.
- The name of the delegate you want to assign must be in the Global Address List in your Microsoft Outlook.

To assign a delegate in Microsoft Outlook:

- 1 On the File menu, select **Account Settings**.

- 2 In the Account Settings menu, select **Delegate Access**.
- 3 In the **Delegates** dialog box, select **Add**.
- 4 Select the delegate's name, and then select **OK**.
- 5 In the Delegate Permissions dialog box, select **Editor** in the **Calendar** drop-down list, and then select **OK**.
- 6 Select **OK** to close the Delegates dialog box.

Schedule a Meeting on Behalf of Another Host

You can schedule a meeting on behalf of another host:

- [About scheduling a meeting for another host](#) (on page 27)
- [Schedule a meeting for another host](#) (on page 28)
- [Start a meeting for another host](#) (on page 29)

About scheduling a meeting for another host

Delegates only

You can schedule a meeting on behalf of another host if the host gave you the permission to do so.

For example, if you are an administrative assistant to a director who needs to host WebEx meetings on a regular basis, the director can assign you to schedule meetings on his or her behalf.

With scheduling permission given by another host, you can schedule, edit, and cancel meetings for that host.

Before you schedule a meeting for another host, ensure that:

- You have a WebEx host account. To obtain a WebEx host account, contact your administrator.

- The integration to Outlook is installed in your Outlook.
- The actual host does the following:
- gives you scheduling permission on the WebEx site.
- selects you as a delegate in Microsoft Outlook and shares his or her calendar with you.

Note:

- After scheduling a meeting on behalf of another host, you can also start the meeting for that host, if necessary.
- At any time, the actual host can remove scheduling permission from you.

Schedule a meeting for another host

Delegates only

To schedule a meeting or an appointment for another host, first open the host's Outlook calendar, which the host already shared with you.

- 1 Open the other host's calendar in Outlook by doing the following:
 - a) On the **File** menu, choose **Open > Other User's Folder**.
The Open Other User's Folder dialog box appears.
 - b) Type the name of the actual host or click **Name** to select the actual host's name.
 - c) Select **Calendar** in the **Folder type** drop-down list, and then click **OK**.
The shared calendar appears.

Note: There are multiple ways of opening another person's calendar, depending on how you customize your views in Outlook. For details, see the Microsoft Outlook Help.

- 2 If you are viewing multiple calendars side by side, ensure that you select the actual host's calendar by clicking it once.
- 3 Open a new Meeting Request or Appointment window in Outlook, and then specify information and settings for the meeting.

If you are scheduling the meeting for another host, a message indicates that in the WebEx Settings dialog box .

Start a meeting for another host

Once you schedule a meeting for another host, the actual host receives a confirmation email message in his or her Outlook. First ensure that the actual host still shares his or her calendar with you in Outlook. Then you can start the meeting from the host's calendar.

To start a meeting for another host:

1 Open the other host's calendar in Microsoft Outlook by doing the following:

a) In Microsoft Outlook, on the **File** menu, choose **Open > Other User's Folder**.

The Open Other User's Folder dialog box appears.

b) Type the name of the host or click **Name** to select the host's name.

c) Select **Calendar** in the **Folder type** drop-down list, and then click **OK**.

The shared calendar appears.

Note: There are multiple ways of opening another person's calendar, depending on how you customize your views in Outlook. For details, see the Microsoft Outlook Help.

2 Double-click the meeting item in the other host's calendar.

The confirmation email message appears.

3 To start the meeting, follow the instructions in the email message, and ensure that you log in to your own WebEx host account on the WebEx site.

Edit and Cancel Meetings

You can make changes to your scheduled meetings:

- [Edit a scheduled meeting](#) (on page 31)
- [Cancel a meeting](#) (on page 32)

Edit a scheduled meeting

Once you edit a scheduled meeting, Integration to Outlook sends an updated meeting invitation to any attendees whom you invited to the meeting and also updates the meeting information on your WebEx site.

- 1 On your Microsoft Outlook calendar, open the item for the scheduled meeting.
- 2 Edit meeting information.
- 3 Do *one* of the following, as appropriate:
 - To send the updated meeting invitation to invited attendees and save the updated meeting in your Outlook calendar, select **Send Update**.
 - To save the updated meeting to your Outlook calendar without sending an update, select **Save and Close**.

Integration to Outlook contacts your WebEx site and updates the meeting on the site.

Important:

- The CMR Hybrid integration does not support exceptions to a recurring meeting series; in other words, it does not support changes to an individual occurrence of the meeting series. Any changes you make to a CMR Hybrid meeting series should apply to the entire series. WebEx-only meetings, however, do support exceptions to a recurring meeting series.
- If you reschedule or cancel a single occurrence of a recurring WebEx meeting using Microsoft Outlook, the changes will show only in Outlook, not on your WebEx site. For example, if you change the starting time of a single occurrence of a recurring WebEx meeting in Outlook, attendees can still join the meeting at the old starting time. Therefore, if you want to modify a recurring meeting using Outlook, we recommend that you apply the changes to the entire series of the meeting.

Cancel a meeting

You can cancel a meeting in Microsoft Outlook. When canceling a meeting, you can also send a cancellation notice to all attendees whom you invited to the meeting.

WebEx Integration to Outlook also contacts your WebEx site and cancels, or removes, the meeting from your site.

- 1 In Microsoft Outlook, open the meeting item.
- 2 On the toolbar, select **Cancel**.
- 3 Select **Send Cancellation**.

Install and Uninstall Productivity Tools

You can install or uninstall WebEx Productivity Tools:

- [Install WebEx Productivity Tools](#) (on page 33)
- [Uninstall WebEx Productivity Tools](#) (on page 34)

Install WebEx Productivity Tools

If your site administrator has turned on WebEx Productivity Tools for your WebEx site, it may install automatically for you. In addition, whenever newer versions are available, WebEx Productivity Tools are updated automatically.

If necessary, you can also download and install WebEx Productivity Tools manually. Before installing WebEx Productivity Tools, check the system release notes to make sure your computer meets the minimum system requirements.

- 1 Sign in to your WebEx site.
- 2 Select **Downloads**.
- 3 Under Productivity Tools, select **Mac**.
- 4 Select **Download**. The installation program (with the extension **.dmg**) automatically downloads to your computer.
- 5 Run the installation file and follow the instructions.

Uninstall WebEx Productivity Tools

- 1 Select **Applications > WebEx > Productivity Tools > Uninstall**.
You may be prompted to enter your password.
- 2 Select **OK** to continue.
- 3 Select **Yes** to confirm.

