



WebEx Integration to Outlook for Windows

User Guide

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Introducing WebEx Integration to Outlook for Windows

For an overview of WebEx Integration to Outlook for Windows, see [About WebEx Integration to Outlook](#) (on page 5).

For an overview of each Integration to Outlook option, see [About the Integration to Outlook options](#) (on page 6).

About WebEx Integration to Outlook

WebEx Integration to Outlook provides a convenient way for you to schedule or start WebEx 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 site—that is, the site on which you normally schedule and join your WebEx 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 site, and are automatically updated when new versions are available. You can also install Productivity Tools manually. For more information, see [Installing WebEx Productivity Tools](#) (on page 35).

Once WebEx Productivity Tools are installed, WebEx integration options appear in Microsoft Outlook, allowing you to quickly schedule an online 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 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 site.

WebEx Integration to Outlook also provides the following:

- quick access to My WebEx on your WebEx 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 select 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 toolbar buttons.

- **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. For details, see *Setting Up WebEx Productivity Tools* (on page 38).

- **Schedule Meeting** - Selecting this button opens the Outlook Appointment window, which contains Integration to Outlook options for scheduling an online meeting. You can specify options for scheduled meetings on the **Scheduled Meetings** tab of the WebEx Settings dialog box. For details, see [Setting Up WebEx Productivity Tools](#) (on page 38).
Note: the Meeting window in Outlook also contains the WebEx integration options.
- **WebEx Settings** - Selecting this button opens a menu that provides the following options:
 - My WebEx—Lets you access My WebEx, in which you can manage your account information and the meetings that you scheduled, on your WebEx service Web site. For details about My WebEx, refer to the online Help on your site.
 - Account Settings—Opens the Account tab of the WebEx Settings dialog box and lets you specify your WebEx user account information—that is, the URL of your WebEx service Web site and your username and password. You can also specify additional options in the WebEx Settings dialog box, such as options for instant meetings and scheduled meetings.
 - Meeting Templates—Lets you view templates that you or your site administrator saved on your WebEx service Web site. The templates contain meeting settings. You can select the template that meets your needs. Meeting templates are available only if site administration settings allow hosts to use templates for Outlook.
 - Set Scheduling Permission—Opens the My WebEx Profile page on which you can assign a delegate to schedule or edit meetings on your behalf. For details, see [Assigning a delegate to schedule meetings for you](#).
 - Help—Lets you look up instructions for using WebEx Integration to Outlook.
 - About—Lets you view the version number and license and patent information about WebEx Integration to Outlook.

Scheduling a Meeting

For an overview of scheduling a meeting using Integration to Outlook, see [About scheduling a meeting](#) (on page 9).

To set up a meeting and invite attendees to the scheduled meeting, see [Setting up a meeting and inviting attendees](#) (on page 10).

To assign a delegate to schedule or edit meetings for you, see [Assigning a delegate to schedule meetings for you](#) (on page 16).

About scheduling a meeting

To schedule an online meeting using WebEx Integration to Outlook and to send meeting invitations, be aware of the following:

- Integration to Outlook provides basic options for scheduling a meeting. Some options that appear on your WebEx service Web site are not available in Integration to Outlook.
- Integration to Outlook does not support all of the recurrence options that are available in Microsoft Outlook. For details, see [Specifying a recurrence pattern for a meeting](#) (on page 14).
- In any meeting invitations that you send from Microsoft Outlook, the meeting's starting time appears in the time zone that is set on your computer, not in your site preferences for your WebEx service.

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

Setting up a meeting and inviting attendees

To set up a meeting using Integration to Outlook, see [Setting up a meeting](#) (on page 10).

To set up a Personal Conference meeting using Integration to Outlook, see [Setting up a Personal Conference meeting](#) (on page 12).

To invite attendees to a scheduled meeting, see [Inviting attendees](#) (on page 13).

To specify a recurring meeting, see [Specifying a recurrence pattern for a meeting](#) (on page 14).

Setting up a meeting

To set up an online meeting using WebEx Integration to Outlook, open a new Meeting Request or Appointment window in Outlook, and then specify information and settings for the meeting.

- 1 Do *either* of the following in Microsoft Outlook:
 - Select **Schedule Meeting** on the WebEx toolbar.
 - On the **File** menu, choose **New > Meeting Request** or **New > Appointment**.
- A scheduling window appears with the **Add WebEx Meeting** button.
- 2 Do the following to specify general meeting information:
 - Type a topic for the meeting in the **Subject** box.
 - In the **Start time** and **End time** drop-down lists, specify the starting and ending times for the meeting, respectively.
 - Optional. To specify a recurrence pattern for your meeting, select **Recurrence**, and then select recurrence options. For details, see [Specifying a recurrence pattern for a meeting](#) (on page 14).
 - Optional. Specify other options that Microsoft Outlook provides, such as a meeting reminder.
- 3 Select **Add WebEx Meeting** to specify meeting settings.
- 4 If the **Account** tab of the WebEx Settings dialog box appears, type the necessary information, and then select **OK**.

The WebEx Settings dialog box appears. If you are scheduling the meeting for another host, a message, "You're scheduling for [host name]," indicates that in the WebEx Settings dialog box.

- 5 Select the **Service type** for a WebEx meeting, or select **MeetingPlace Personal Conference** for a MeetingPlace Personal Conference meeting.

Note: If you have a Cisco Unified MeetingPlace account, you can also select a WebEx service type, and then for the **Conference type** option, you can select **Cisco Unified MeetingPlace Audio Conferencing**.

- 6 Optional. Specify one or more attendees as alternate hosts who can run the meeting until select **Resources** and then enter their names in the **Alternate host** list.

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.

- 7 Specify additional meeting settings, and then select **OK**. For details, see *Setting Up WebEx Productivity Tools* (on page 38).

Note: If you schedule a meeting with **Cisco Unified MeetingPlace Audio Conferencing**, and you have turned off both the **Attendees can join meeting X minutes** before starting time and the **Attendees can also join teleconference before starting time** options, attendees cannot join the meeting from a mobile device without someone starting the meeting from the WebEx site first.

- 8 Do one of the following, as appropriate:
 - Send a meeting invitation to attendees. For details, see *Inviting attendees* (on page 13).
 - Select **Save and Close**, and invite attendees to the scheduled meeting at a later time.

Integration to Outlook contacts your WebEx service Web site, and then adds the scheduled meeting to:

- your Outlook calendar
- the list of meetings on the My WebEx Meetings page on your WebEx service Web site
- your Personal Meeting Room page, if your account includes one

Setting up a Personal Conference meeting

To set up a Personal Conference meeting using WebEx Integration to Outlook, open a new Meeting Request or Appointment window in Outlook, and then specify information and settings for the meeting.

- 1 Do either of the following in Microsoft Outlook:
 - Select **Schedule Meeting** on the WebEx toolbar.
 - On the **File** menu, choose **New > Meeting Request** or **New > Appointment**.
- A scheduling window appears with the **Add Personal Conference Meeting** button on the WebEx toolbar.
- 2 Do the following to specify general meeting information:
 - Type a topic for the meeting in the **Subject** box.
 - In the **Start time** and **End time** drop-down lists, specify the starting and ending times for the meeting, respectively.
 - Optional. To specify a recurrence pattern for your meeting, select **Recurrence**, and then select recurrence options. For details, see [Specifying a recurrence pattern for a meeting](#) (on page 14).
 - Optional. Specify other options that Microsoft Outlook provides, such as a meeting reminder.
- 3 Select **Add Personal Conference Meeting** to specify Personal Conference meeting settings.
- 4 If the **Account** tab of the WebEx Settings dialog box appears, type the necessary information, and then select **OK**.

The WebEx Settings dialog box appears. If you are scheduling the meeting for another host, a message, "You're scheduling for [host name]," indicates that in the WebEx Settings dialog box.
- 5 Specify WebEx meeting settings, and then select **OK**.

For details, see [Setting Up WebEx Productivity Tools](#) (on page 38).

- 6 Do one of the following, as appropriate:
 - Send a meeting invitation to attendees. For details, see *Inviting attendees* (on page 13).
 - Select **Save and Close**, and invite attendees to the scheduled meeting at a later time.

Integration to Outlook contacts your WebEx service Web site, and then adds the scheduled meeting to:

- your Outlook calendar
- the list of meetings on the My WebEx Meetings page on your WebEx service Web site
- your Personal Meeting Room page, if your account includes one

Inviting attendees

When using WebEx Integration to Outlook to schedule a meeting, you can invite attendees by selecting their names or email addresses in any of your Microsoft Outlook contacts lists. For example, if your organization maintains a Global Address List, you can invite attendees by selecting their names in that list. You can also invite attendees who are not in an Outlook contacts list by entering their email addresses.

Once you invite an attendee 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 the attendee can select to join the meeting.

- 1 If you have scheduled a meeting using WebEx Integration to Outlook, open the meeting item in your Outlook calendar.

If you opened an Appointment window, select **Invite Attendees** to see the **To** box, in which you can enter attendees' names or email addresses. To remove the To box, select **Cancel Invitation**.
- 2 Enter attendees' names or email addresses in the **To** box, and then select **Send**.

Specifying a recurrence pattern for a meeting

Using Microsoft Outlook recurrence options, you can specify a recurrence pattern for your online meeting. For example, you can specify that a meeting recurs at 2 p.m. every Wednesday until a specific date. The WebEx Integration to Outlook schedules the meeting on each day that you specify in the recurrence pattern.

The recurrence options that you can use with the WebEx Integration to Outlook are limited to the options that are available on your WebEx service Web site. Depending on your WebEx service, the use of a recurrence pattern may not be supported. .

- 1** In the Meeting or Appointment window for the meeting, select **Recurrence**.
- 2** Specify the options in the dialog box, and then select **OK**.

Recurrence pattern support in WebEx Integration to Outlook

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

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</p>

Type	Outlook Option	Converted to WebEx Meeting Option
Monthly		week start to a different day, the week start will not be synchronized with the WebEx site.
	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
Yearly	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
	[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]

Type	Outlook Option	Converted to WebEx Personal Conference Meeting Option
Monthly	Day [x] of every [y] months	Day [x] of every month.
	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.

Assigning 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 [Assigning a delegate on your WebEx site](#) (on page 17).
- In Microsoft Outlook, share your calendar with the delegate. For details, see [Assigning a delegate in Microsoft Outlook](#) (on page 18).

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.

Assigning 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 > My Profile**.

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 [Assigning a delegate in Microsoft Outlook](#) (on page 18).

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 service Web site:

- 1 In Microsoft Outlook, select **WebEx**.
- 2 On the menu that appears, choose **Set Scheduling Permission**.
- 3 The My WebEx > Preferences page appears.
- 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**.

Assigning 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 [Assigning a delegate on your WebEx service Web site](#) (on page 17).

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.

3

Scheduling for Another Host

For an overview of scheduling on behalf of another host, see [About scheduling a meeting for another host](#) (on page 19).

To schedule a meeting or an appointment for another host, see [Scheduling a meeting or an appointment for another host](#) (on page 20).

To start a meeting for another host, see [Starting a meeting for another host](#) (on page 21).

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. For details, see [Starting a meeting for another host](#) (on page 21).
- At any time, the actual host can remove scheduling permission from you.

Scheduling a meeting or an appointment 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 select **Name** to select the actual host's name.
 - c) Select **Calendar** in the **Folder type** drop-down list, and then select **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 selecting it once.
- 3 Open a new Meeting Request or Appointment window in Outlook, and then specify information and settings for the meeting.

Starting 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 select **Name** to select the host's name.
 - c) Select **Calendar** in the **Folder type** drop-down list, and then select **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.

Editing and Canceling Scheduled Meetings

To edit a scheduled meeting, see [Editing a scheduled meeting](#) (on page 23).

To cancel a scheduled meeting, see [Canceling a meeting](#) (on page 24).

Editing a scheduled meeting

Once you schedule a meeting using WebEx Integration to Outlook, you can use Outlook to edit it at any time. For example, you can change its starting time, specify a new password, choose a teleconferencing option, and so on.

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 service Web site.

To edit a scheduled meeting:

- 1 On your Microsoft Outlook calendar, open the item for the scheduled meeting.
- 2 Edit meeting information or change options on either the toolbar or on the Appointment tab.

For example:

- To change the WebEx meeting settings, select **Change Settings**.
- To remove the WebEx meeting settings previously set, select **Cancel WebEx Meeting**.
- To add or change a recurrence pattern, select **Recurrence**.

- To edit the text in the meeting invitation email message, do it on the **Appointment** tab.
- 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, select **Save and Close**.

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

Important:

- If you edit a WebEx meeting using your WebEx service Web site, your changes will not show in Microsoft Outlook. For example, if you change the meeting's starting time using your site, the starting time does not change on your Outlook calendar. Therefore, WebEx meeting service recommends that you use only Outlook to edit a meeting.
- 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 service Web 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, WebEx meeting service recommends that you apply the changes to the entire series of the meeting.

Canceling a Scheduled Meeting

If you schedule a meeting using the integration to Outlook, you can cancel the meeting in Outlook.

After you cancel a meeting in Outlook, the integration to Outlook contacts your WebEx site and deletes the meeting from your WebEx site.

[To cancel a scheduled meeting:](#)

- 1 Open the meeting item from your Outlook calendar.
- 2 Select **Cancel Meeting**.
- 3 Select **Yes** in the confirmation message.
- 4 Select **Send Cancellation**.

Note: If you edit or cancel a WebEx-only meeting using your WebEx site, the changes will not be reflected in Outlook. For example, if you change the meeting starting time using your site, your Outlook calendar still shows the old starting time. For this reason you should only use Outlook to edit a WebEx-only meeting if you originally scheduled it with Outlook.

Starting a Meeting

For an overview of starting a meeting, see [About starting a meeting](#) (on page 27).

To start your scheduled meeting from Outlook, see [Starting a meeting from Microsoft Outlook](#) (on page 27).

To start a Personal Conference meeting see, [Starting a Personal Conference meeting](#) (on page 28).

To start your scheduled meeting from your WebEx service Web site, see [Starting a meeting from your WebEx service site](#) (on page 28).

About starting a meeting

After you schedule a meeting using WebEx Integration to Outlook, you can start the meeting from your Microsoft Outlook or your WebEx service Web site.

Starting a scheduled meeting from Microsoft Outlook

[To start a meeting from an Outlook meeting item:](#)

In your Microsoft Outlook calendar, open the meeting item, and then select the link to start the meeting.

Important: The link that appears in your meeting item is for meeting hosts only. The link that appears in attendees' invitations is a different link, which attendees can select to join the meeting. For more information, see [Joining a meeting from the invitation email](#).

To start a scheduled meeting from the WebEx menu in Outlook:

- 1 In Microsoft Outlook, select **WebEx**.
- 2 On the menu that appears, 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 Select **Start**.

Your meeting starts and the Meeting Manager window opens.

Starting a meeting from your WebEx site

To start a meeting from your WebEx site:

- 1 In Microsoft Outlook, select **WebEx**.
- 2 On the menu that appears, choose **My WebEx**.
The My WebEx Meetings page appears.

Note: You may be asked to log in to your WebEx service site if you are not already logged in.

- 3 Make sure **The meetings you host** is selected in the list at the top of the page.
- 4 Select **Start** next to the meeting you want to start.

Starting a Personal Conference meeting

To start a Personal Conference meeting from the WebEx menu in Outlook:

- 1 In Microsoft Outlook, select **WebEx**.
- 2 On the menu that appears, select **Start Personal Conference Meeting**.

6

Joining a Meeting

For an overview of joining a meeting, see [About joining a meeting](#) (on page 31).

To join a meeting from the invitation email message, see [Joining a meeting from the invitation email](#) (on page 31).

To join a meeting from the WebEx menu in Outlook, see [Joining a meeting from the WebEx menu in Outlook](#) (on page 32) .

To join a meeting from the WebEx site see, [Joining a meeting from the WebEx site](#) (on page 32).

About joining a meeting

If you use WebEx Integration to Outlook to schedule a meeting and invite attendees to the meeting, they receive an invitation email message that includes a link that they can select to join the meeting.

Meeting attendees can also join a meeting from your WebEx service Web site.

Joining a meeting from the invitation email

In attendees' email programs, they open the invitation email message that they received, and then select the meeting link in the **To join this meeting** section to join the meeting.

The invitation email message or registration confirmation email message that attendees receive contain the necessary information they need to join the meeting, such as the meeting number, meeting password, or registration ID.

Joining a meeting from the WebEx menu in Outlook

- 1 In Microsoft Outlook, select **WebEx**.
- 2 On the menu that appears, choose **Join a Meeting**.
The Join Meeting dialog box opens and shows a list of meetings you are invited to for the current day.
- 3 (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.
- 4 (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.
- 5 In the box below the list of meetings, enter your email address, mobile phone number, or the meeting number.
- 6 Click **Join**.

Joining a meeting from the WebEx site

You can join a meeting you are invited to on your WebEx site.

You may need the following information to join a meeting:

- meeting password
- registration ID—For the Event Center service only. If the event host requires attendees to provide registration IDs before they join the event, they receive a unique ID in their registration confirmation email message.
- meeting number—Attendees must provide this to join an *unlisted* meeting—that is, a meeting that is not displayed on the calendar on your WebEx service Web site.

- 1 In Microsoft Outlook, select **WebEx**.
- 2 On the menu that appears, choose **My WebEx**.

The My WebEx Meetings page appears.

Note: You may be asked to log in to your WebEx service site if you are not already logged in.

- 3** Make sure **The meetings you are invited to** is selected in the list at the top of the page.
- 4** Select **Join** next to the meeting you want to join.

Installing and Setting Up WebEx Productivity Tools

You can install WebEx Productivity Tools to start or join meetings instantly using the WebEx Productivity Tools panel, 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 WebEx Productivity Tools 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 35)
- Open the WebEx Settings dialog box [More...](#) (on page 37)
- Set options for WebEx Productivity Tools [More...](#) (on page 38)
- Uninstall WebEx Productivity Tools [More...](#) (on page 46)

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 38).

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:

- Refer to the WebEx cross-platform release notes for supported operating systems, browsers, and other minimum system requirements.
- 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.

- 1 Log in to your WebEx site.
- 2 Select the **Meeting Center** tab.
- 3 In the left navigation bar, under **Support**, select **Downloads**.
- 4 In the Downloads page, under the WebEx Productivity Tools heading, select **Download**.
The File Download dialog box appears.
- 5 Save the installation program to your computer.
The name of the installation file has an **.msi** extension.
- 6 Run the installation file and follow the instructions.

Note: If you have a previous version of the Productivity Tools you have to uninstall that version before installing the new version.

You may also have to close applications such as Microsoft Outlook and any browsers before installing the new version of Productivity Tools. Those applications must be started up again and you may have to sign in before seeing the new interface.

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 38).

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.

Opening the WebEx Settings dialog box

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

Select **Start > Programs > WebEx > Productivity Tools > WebEx Settings**.

To open the WebEx Settings dialog box from the WebEx Productivity Tools Panel:

- 1 If the WebEx Productivity Tools Panel is not already open, do one of the following:
 - Double-select the WebEx Productivity Tools icon on your desktop.
 - Go to **Start > Programs > WebEx > Productivity Tools > WebEx Productivity Tools**.
- 2 In the WebEx Productivity Tools Panel, select **Edit WebEx Settings**.

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

In the WebEx menu, select **Account Settings**.

To open the WebEx Settings dialog box from Microsoft Office:

In Microsoft Word, Microsoft Excel, or Microsoft PowerPoint, select **WebEx Settings**.

To open the WebEx Settings dialog box from instant messengers:

Select **WebEx > WebEx Settings**.

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 37).
- 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 40).
- 3 Select **Refresh**.
- 4 Select the "**Meet Now**" **Settings** tab.
- 5 Specify options for meetings started instantly from the WebEx Productivity Tools panel, Microsoft Office, browsers, instant messengers, right-select menus, and from Microsoft Outlook or IBM Lotus Notes. For more details, see [About the Instant Meetings tab](#) (on page 40).
- 6 Select 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 42).
- 8 Select the **Preferences** tab.
- 9 Specify options for the WebEx Productivity Tools panel. For more details, see [About the Preferences tab](#) (on page 44).
- 10 Select the **Tools** tab.
- 11 Select which applications to use WebEx integrations with. For more details, see [About the Tools tab](#) (on page 45).

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**.

To access the WebEx Settings dialog box from the WebEx Productivity Tools Panel:

- 1 If the WebEx Productivity Tools Panel is not already open, do one of the following:
 - Double-click the WebEx Meet Now icon on your desktop.
 - Go to **Start > Programs > WebEx > Productivity Tools > Open WebEx Productivity Tools.**
- 2 In the WebEx Productivity Tools Panel, click **Edit WebEx Settings**.

To access the WebEx Settings dialog box from the WebEx Productivity Tools taskbar icon:

- 1 Right-click the WebEx Productivity Tools taskbar icon.
- 2 Choose **WebEx Settings** from the menu.

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

In the WebEx menu, select **Account Settings**.

To access the WebEx Settings dialog box from Microsoft Office:

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

To access the WebEx Settings dialog box from Instant Messengers:

Click **WebEx >WebEx Settings**.

Tabs in this dialog box

The WebEx Settings dialog box contains the following tabs:

- Account [More...](#) (on page 40)
- "Meet Now" Settings [More...](#)
- Scheduled Meeting [More...](#)
- Preferences [More...](#) (on page 44)
- Tools [More...](#) (on page 45)

About the Account tab

Account options allow you to log in to your WebEx site.

- **Site URL** - Enter the URL to a WebEx Meeting Center site to which you want to log in. Example of URL format: company.webex.com

Note: If you enter the URL for a site that does not support TelePresence integration, such a site allows you to schedule WebEx-only meetings and also provides appropriate documentation.

- **Username** - Enter the username for a host account on your WebEx site.
- **Password** - Enter the password for the host account on your WebEx site.
- **Remember my password** - Store the username and password you entered so that you do not need to enter your username and site URL next time you log in.
- **Forgot your password?** - Open the Forgot Your Password? page on your WebEx site, which lets you send a request to create a new 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 site.
- **Locale** - Verify the country or locale that is currently selected for your WebEx site.
- **Time zone** - Verify the time zone that is currently selected for your WebEx site.
- **Change settings for WebEx service Web site** - Open the My WebEx > My Profile page on your WebEx site and make changes to your profile.
- **Refresh** - Refresh the WebEx Settings dialog box with the most recent settings from your WebEx site.

About the "Meet Now" Settings tab

Instant meeting options affect meetings started instantly from the WebEx Productivity Tools panel, Microsoft Office, browsers, instant messengers, right-select menus, and from Microsoft Outlook or IBM Lotus Notes.

- **Meeting template** - Select the template to use for the meeting.

- **Meeting** - Select the type of WebEx session for which you want to start a meeting. This option lists only the meeting types available for your site and user account.
- **Use my Personal Room for instant meetings** - Select to use your Personal Room for instant meetings by default.
- **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 on public calendar** - Include this meeting on the meeting calendars on the WebEx service site. Available for meetings, sales meetings, and training 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.
- **Audio Connection** - Select the type of audio connection you would like to use:
 - **None:** Specifies that the meeting does not include an audio connection, or the meeting includes an audio connection 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 for its audio connection, 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 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 connect to audio.
 - Display toll-free number:** Select if your site provides a toll-free number and you want to display it so attendees can call it to connect to audio.

Note: After you start the meeting, participants can choose to use their computer as their audio device, or to use their phone as their audio device.

- **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.

- **Entry and exit tone** - Select the tone played when an attendee joins or leaves the audio connection.

About the Scheduled Meetings tab

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

- **Meeting template** - Select the template to use for the meeting.
- **Meeting** - Select the type of WebEx session for which you want to start a meeting. This option lists only the meeting 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.
- **Exclude password from meeting invitation** - Exclude the meeting password from the email message that is sent to everyone who is invited to your meeting.
- **List on public calendar** - Include this meeting on the meeting calendars on the WebEx service site. Available for meetings, sales meetings, and training sessions only.
- **Attendees can join meeting X minutes before starting time** - Specify that the Request to Join dialog box appears on your screen when someone tries to join your meeting. Available for support sessions only.
- **Audio and Tracking tab**
 - **Audio Connection** - Select the type of audio connection you would like to use:
 - None**: Specifies that the meeting does not include an audio connection, or the meeting includes an audio connection 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 for its audio connection, 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:
 - a) **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 connect to audio.
 - b) **Attendees can also join teleconference before starting time:** Allow attendees to join the meeting within a set number of minutes before the meeting's starting time. If you clear this check box, you must start the meeting before attendees can join it.
 - c) **Display toll-free number:** Select if your site provides a toll-free number and you want to display it so attendees can call it to connect to audio.

Note: After you start the meeting, participants can choose to use their computer as their audio device, or to use their phone as their audio device.

- **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.

- **Entry and exit tone** - Select the tone played when an attendee joins or leaves the audio connection.
- **Registration tab**
- **Require attendee registration** - Specify that all attendees must register to attend the meeting so you can accept or deny entry into your meeting. An attendee cannot attend the meeting until you accept his or her registration request. This option is available only if the Attendees can join the meeting [x] minutes before starting time option is cleared.

- **Automatically accept all registrations** - Accept all registration requests automatically. If this option is not selected, you must accept registration requests manually by using the options on the Registered Attendees page on the WebEx service site. This option is available only if the Attendees can join the meeting [x] minutes before starting time option is cleared and the Require attendee registration option is selected.
- **Resources tab**
 - **Info tab templates** - Choose a template for the Info tab, which appears in the content viewer during the meeting. The Info tab contains information about the meeting, including the meeting host, teleconference phone numbers, and host key (for the host only). You can choose another template only if one or more customized Info tab templates are available for your meeting service. Your site administrator can add templates for your service.
 - **Automatically play the presentation before the host joins the meeting** - Automatically play a presentation that attendees can view before the host actually joins the meeting.

About the Preferences tab

The preferences determine some features of the WebEx Productivity Tools panel.

- **Always stay on top of desktop** - Have the WebEx Productivity Tools panel appear on top of every application or program that is open on your computer.
- **Show WebEx Productivity Tools panel when Windows starts**
- **Show Productivity Tools icon on taskbar**
- **Show scheduling function in Productivity Tools panel** - Show the links Start Scheduled Meeting and Schedule Meeting on the panel. Selecting either of the links takes you to the appropriate pages on your WebEx service site.
- **Default Address Book** - Select an email and scheduling program for a default address book. WebEx Productivity Tools integrates with the email program you select, making it easy for you to obtain your contacts' email addresses. Selecting on the WebEx Productivity Tools panel opens an address book from the email program you select here.
- **Start Meeting Options**

- **Allow me to change meeting topic when meeting starts**
- **Allow me to change meeting password when meeting starts**

About the Tools tab

Tools options determine which programs include WebEx integrations and shortcuts.

- **Email and Scheduling** - Show WebEx Productivity Toolbar and commands for scheduling meetings or starting instant meetings with WebEx Productivity Tools with either Microsoft Outlook or IBM Lotus using the contacts and calendar from Microsoft Outlook or IBM Lotus.
- **Microsoft**
 - **Use WebEx with Microsoft Office** - Show WebEx buttons for starting an instant meeting with WebEx Productivity Tools and automatically sharing a selected file or document from the following Microsoft Office applications:
 - Excel
 - PowerPoint
 - Word
 - **Show toolbar in Internet Explorer** - Show WebEx Productivity Toolbar that allows you to start instant meetings from the Microsoft Internet Explorer toolbar.
 - **Show in Windows right-select menus (requires reboot)** - Show a WebEx command that allows you to start an instant meeting and automatically share a selected file or document from the right-select shortcut windows available in Windows Explorer.
- **Instant Messengers**
 - **Use WebEx with instant messenger** - Show WebEx buttons and commands that allow you to start an instant meeting from an instant messenger. You can select one or more of the following instant messengers:
 - AOL
 - Google Talk
 - Lotus Sametime
 - Skype

- Windows Messenger
- Yahoo Messenger
- **Mozilla Firefox**
 - **Show toolbar in Firefox** - Show WebEx Productivity Toolbar 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 Select **Start > Programs > WebEx > Productivity Tools > Uninstall**.
- 2 Select **Yes** to confirm that you want to uninstall WebEx Productivity Tools.

To uninstall WebEx Productivity Tools by using the Control Panel:

- 1 Select **Start > Settings > Control Panel**.
- 2 Double-select **Add/Remove Programs**.
- 3 Select **WebEx Productivity Tools**.
- 4 Select **Remove**.
- 5 Select **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 38).

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