Scheduling WebEx Meetings with Microsoft Outlook

About WebEx Integration to Outlook

WebEx Integration to Outlook provides a convenient way for you to schedule or start online 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 online meetings.

WebEx Integration to Outlook is a WebEx Productivity Tool for Microsoft Outlook. If your administrator has configured it, you can choose to install Productivity Tools from the **Downloads** link on your WebEx site. Depending on system configuration, Productivity Tools can automatically update when new versions are available.

Once 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

- You are familiar with Microsoft Outlook

- You are using a supported version of Microsoft Outlook:

  ◦ Microsoft Outlook 2007 SP2 and later

  ◦ Microsoft Outlook 2010 (32-bit and 64-bit editions; all Service Packs)

  ◦ Microsoft Outlook 2013

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

Scheduling a WebEx Meeting from Microsoft Outlook

To schedule 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.

Before You Begin

Be aware of the following:

- Integration to Outlook does not support all of the recurrence options that are available in Microsoft Outlook.

- 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 WebEx account preferences.

  On your WebEx 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.

- When you schedule a Personal Conference meeting, the Participant access code for the selected Personal Conferencing account is also the Meeting password.

- Since you are scheduling the meeting from Microsoft Outlook, any users you invite as alternate hosts will receive two meeting notifications:

  ◦ one inviting them as an invitee with the Join the Meeting link

  ◦ one inviting them as an alternate host with the Start the Meeting link

  Your invitees can use either link to enter the meeting. If you schedule the meeting from the web, users you invite as alternate hosts will receive just one email notification with a link to start the meeting.

Procedure

Step 1 From your Microsoft Outlook client, open a new meeting request by doing one of the following:

- Choose **New > Meeting Request** or **New > Appointment**.

- Select **Schedule Meeting** from the WebEx menu

A Meeting scheduling window appears with the **Add WebEx Meeting** ball in the WebEx menu.

Step 2 Enter your meeting details, such as the meeting subject and start and end times, and invite attendees.
To specify a recurrence pattern for your meeting, click **Recurrence**, and then select recurrence options.

Step 3 Select **Add WebEx Meeting** from the WebEx menu.
The **WebEx Settings** dialog box appears.

Note If the **WebEx Settings** dialog box does not appear, sign in to WebEx Assistant and select the **Add WebEx Meetings** icon again.

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

Step 5 (Optional) If you want to grant other users the permission to start your meeting on your behalf, select the **Alternate Host** tab and select them from the list. You must first add them to your list of attendees before selecting them.

Note The Alternate Host feature is not available for Personal Conference meetings.

Step 6 (Optional) On the **Audio Conference** tab select your audio conference type.

- **WebEx Audio** - This audio connection mode lets meeting hosts and participants join the online portion of the meeting using the link provided in the meeting email invitation message. Once connected to a meeting, users can either call in to the meeting or use the **Call Me** feature to receive a call at a number they have provided. This option requires a host to schedule a meeting with either the **Meet Now** feature or the scheduler.

- **Personal Conferencing** - This audio connection mode lets a meeting host quickly start the audio portion of a Cisco WebEx meeting at any time. The meeting host and participants simply dial the same call-in number, enter access codes, and the audio portion of the meeting begins. The system then sends an email to the meeting host with a link to the online portion of the meeting. If the host chooses to start the online meeting, participants can then use it to share information or collaborate on an idea. The meeting host is not required to schedule Personal Conferencing meetings in advance, and once generated, the access codes do not change.

Note You must have a Personal Conference account and a host PIN to use the Personal Conferencing option.

Step 7 Select **OK** to close the **WebEx Settings** dialog box.
WebEx information displays in your Microsoft Outlook appointment form.

Step 8 Select **Send** to save your meeting information and send email invitations to invitees.
The scheduled meeting displays in your Outlook calendar and the list of meetings on your WebEx Meetings page.

Related Topics

Starting a Scheduled Meeting from Microsoft Outlook

Procedure

Step 1	In Microsoft Outlook, double-click the meeting entry from the Outlook calendar. The meeting notification appears.
Step 2	Select the link to start your meeting.

What to Do Next

If you are using Chrome 32 and later or Firefox 27 and later, you may see a prompt to install a Cisco WebEx plug-in. Select **Download** and follow the instructions to install the required plug-in.

*The exact versions of Chrome and Firefox that are impacted by this policy have not been finalized as of the publishing of this document.

Note After installing the plug-in, you may need to enable it.

- If you are using Chrome, select the plug-in icon that displays on the top right of your page, check the **Always allow plug-ins...** option and select **Done**.

- If you are using Firefox, select the plug-in icon that displays at the beginning of your URL (before https:) and select **Allow and Remember**.

If the meeting doesn't start automatically, refresh the page.

Recurrence Pattern Support in WebEx Integration to Outlook

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

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]	Every [x] weeks on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday]

Type	Outlook Option	Converted to WebEx Meeting Option
Monthly	Day [x] of every [y] months	Day [x] of every [y] months
	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
End date	No end date	No end date
	End after [x] occurrences.	End after [x] occurrences. This will convert to end by *date* on the page.
	End by [date input]	End by [date input]

Related Topics

About Delegates

WebEx Integration to Outlook supports the concept of having one user, a delegate, complete scheduling activities on behalf of another user. These activities can include scheduling, editing, canceling, and starting meetings. For example, if you need to host WebEx meetings on a regular basis, you can give your assistant permission to complete these activities for you by assigning this person as your delegate.

Things to Know Before Assigning a Delegate

- If you do not see the option to assign a delegate on your WebEx site, enable the **Scheduling Permission** option on your **My Account** page.

- Your delegate must also have a WebEx host account on your WebEx site.

- The email addresses for both your and the delegates' accounts on your WebEx site must match those in Microsoft Outlook.

- Meetings that your delegate schedules appear in your calendar. If you want to edit them, you must have WebEx Integration to Outlook installed on your computer.

- You can remove scheduling permission from your delegate at any time.

- The **Scheduling Permission** option applies only to WebEx Audio meetings. Another user cannot schedule Personal Conference meetings on your behalf.

Things to Know If You Are Assigned to Be a Delegate

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 WebEx Integration to Outlook add-in is installed.

- 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.

Related Topics

Assigning a Delegate on the WebEx Site

The following task describes how to grant scheduling permissions to your delegate on the WebEx site.

Note   Delegates can schedule only WebEx Audio meetings. A meeting host is required to schedule his or her Personal Conference meetings.

Procedure

Step 1   Sign in to your WebEx site.
The **Meetings** page appears.

Note   If you are having sign in issues, make sure that cookies are enabled in your browser. You cannot sign in to Cisco WebEx if cookies are disabled.

Step 2   Select **My Account** in the top right.
The **My Account** page appears.

Step 3   Scroll down to the Session Options section.

Step 4   For Scheduling Permission, enter the email addresses of users you are assigning as a delegate.
Note   Users must have host privileges in Cisco WebEx before you can assign them as delegates.

Step 5   Click **Update**.

What to Do Next

In Microsoft Outlook, select the delegate and share your calendar with him or her.

Related Topics

Assigning a Delegate in Microsoft Outlook

The following task describes how to share your Microsoft Outlook calendar with your delegate. These steps assume that you are using Microsoft Outlook 2010. Since the exact steps for this task may vary based on your version of Outlook, refer to your Outlook Help documentation for details.

Before You Begin

- Make sure that you have granted scheduling permission to your delegate from your WebEx **My Account** page.

- 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.

Procedure

Step 1   From Microsoft Outlook, select **File** > **Account Settings** > **Delegate Access**.
The **Delegates** window appears.

Step 2   Select **Add**.
The **Add Users** window appears.

Step 3   Select the delegate's name, then click **Add**.

Step 4   Click **OK**.

The **Delegate Permissions** dialog box appears.

Step 5 For Calendar, select **Editor** then click **OK**.

Step 6 Select **OK** to close the Options dialog box.

Related Topics

Scheduling a Meeting or an Appointment for Another Host

Before You Begin

This task assumes the following:

- You are a delegate of the host on whose behalf you are scheduling.

- The other host has shared his or her calendar with you.

- You are scheduling a WebEx Audio meeting on behalf of your host.

Procedure

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

a) Select **File > 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 his or her name.

c) For Folder type, select **Calendar**, then click **OK**.
   The shared calendar appears.

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

Step 2 If you are viewing multiple calendars side by side, ensure that you select the actual host's calendar by clicking it once.

Step 3 Open a new meeting request in Outlook, and then specify information and settings for the meeting.

Related Topics

Starting a Meeting for Another Host

Once you schedule a meeting for another host, the other host receives a confirmation email message in his or her Microsoft Outlook. Complete this task to start the meeting from the other host's calendar.

Before You Begin

This task assumes that you have access to the other host's Microsoft Outlook calendar.

Procedure

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

a) In Microsoft Outlook, select **File > Open > Other User's Folder**.
The **Open Other User's Folder** dialog box appears.

b) Type the name of the other host or click **Name** to select his or her name.

c) For Folder type, select **Calendar**, then click **OK**.
The shared calendar appears.

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

Step 2 Double-click the meeting item in the other host's calendar.
The confirmation email message appears.

What to Do Next

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

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> **Note** After installing the plug-in, you may need to enable it.
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> - If you are using Chrome, select the plug-in icon that displays on the top right of your page, check the **Always allow plug-ins...** option and select **Done**.
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>
> If the meeting doesn't start automatically, refresh the page.

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, or choose an alternate host and so on. Once you edit a scheduled meeting, Integration to Outlook sends an updated meeting invitation to any invitees and also updates the meeting information on your WebEx site.

Before You Begin

- If you edit a WebEx meeting from the WebEx site, your changes will not show in Microsoft Outlook. Make sure that you use the same scheduling interface for both scheduling and editing WebEx meetings.

- You must have a Personal Conference account and a host PIN set up if you want to set the audio connection type for your meeting to Personal Conferencing.

Procedure

Step 1   On your Microsoft Outlook calendar, open the item for the scheduled meeting.

Step 2   Edit the 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.

Step 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**.

Your meeting is updated in both your Microsoft Outlook calendar and the WebEx site.

Canceling a Meeting in Microsoft Outlook

Procedure

Step 1   Open the meeting item in Microsoft Outlook.

Step 2   Select **Delete**.

Step 3   Choose whether to notify invitees or not, and then click **OK**.

Step 4   Click **OK** in the confirmation box.
The meeting is removed from your Outlook calendar and your WebEx site. A message appears confirming that your meeting was removed from the site.

Joining a Meeting from Microsoft Outlook

Procedure

Step 1   In Microsoft Outlook, click the meeting entry in your Outlook calendar.
The meeting notification appears with all of the information you need to join the meeting, such as the meeting number and meeting password if required.

Step 2   Click the link to join your meeting.

What to Do Next

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If the meeting doesn't start automatically, refresh the page.

Joining a Meeting from the WebEx Site

Before You Begin

You may need the following information to join a meeting from the WebEx site:

- Meeting password—required if the meeting host scheduled the meeting with a password requirement.

Procedure

Step 1 In Microsoft Outlook, select **WebEx** > **Go to WebEx Site** or **Schedule Meeting** > **Go to WebEx Site**. The **Meetings** page appears.

Step 2 Locate your meeting in the Today list.
   Note If you cannot find your meeting, select the **All Meetings** tab and do the following:

   - Enter your search parameters.

   - Select **The meetings you are invited to** from the drop-down list.

   - Select **Search**.

Step 3 Select **Join** next to the meeting you want to join.

What to Do Next

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