

WebEx™ Integration to Outlook

User's Guide



Version 3.2

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Introducing WebEx Integration to Outlook

If you want to...	See...
get an overview of WebEx Integration to Outlook	<i>About WebEx Integration to Outlook</i> on page 1
get an overview of each Integration to Outlook option	<i>About the Integration to Outlook options</i> on page 3
check for version updates	<i>Checking for updates to Integration to Outlook</i> on page 5
uninstall WebEx Integration to Outlook	<i>Uninstalling WebEx Integration to Outlook</i> on page 5

About WebEx Integration to Outlook

WebEx Integration to Outlook provides a convenient way for you to schedule or start online meetings or Audio Only 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 an add-in program for Microsoft Outlook. You download Integration to Outlook from your WebEx service Web site, and then install it on your computer. Once you install Integration to Outlook, WebEx 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 service Web site.
 - The Integration to Outlook option 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
- quick access to the One-Click Setup page on your WebEx service Web site, on which you can set up an instant meeting that you can start at any time, as often as you want (not available for all WebEx service sites)
- a template for meeting invitations, which you can modify with any information you want

System requirements

Before installing WebEx Integration to Outlook, ensure that your computer meets the following system requirements:

- Windows 2000, XP, or Vista or Windows Server 2003
- Intel x86 (Pentium 400MHZ +) or compatible processor
- Microsoft Internet Explorer 6 or later, Netscape Navigator 7.x or later, Mozilla 1.6 or later, or Firefox 1.x or later
- JavaScript and cookies enabled for the browser
- 56K or faster Internet connection
- Microsoft Outlook 2000 or later

Installing WebEx Integration to Outlook

You can download WebEx Integration to Outlook from your WebEx service Web site.



Note To download WebEx Integration to Outlook, you must have a host account on your WebEx service Web site.

To download WebEx Integration to Outlook from your WebEx service site:

- 1 Log in to your WebEx service site.
- 2 On the left navigation bar of your WebEx service site, click **Support > Downloads**.
- 3 Go to the Integration to Outlook 3.2. section, and then click **Download now**.
- 4 Save the installation file, which has a .msi extension, to your local computer.
- 5 Run the installation file.
- 6 Follow the instructions in the wizard to complete the installation.

About the Integration to Outlook options

After you install WebEx Integration to Outlook, the WebEx toolbar appears in the Microsoft Outlook window, as follows:



Click and drag one of these lines to “float out” the WebEx toolbar, as you can with the Microsoft Outlook toolbars.



Clicking the **X** button closes the floating toolbar. To regain the toolbar, right-click any Microsoft Outlook toolbar, and then choose **WebEx Integration**.

The following table describes the WebEx toolbar buttons.

Button	Description
WebEx	<p>Clicking this button opens a menu that provides the following options:</p> <ul style="list-style-type: none"> ■ 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—Lets you specify your WebEx user account information—that is, the URL of your WebEx service Web site and your user name and password. ■ 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. ■ Invitation Template—Lets you open the template for meeting invitations and customize the template for your needs. For details, see <i>About customizing meeting invitation templates</i> on page 27. ■ 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 <i>Assigning a delegate to schedule meetings for you</i> on page 19. ■ Check for Update—Lets you check for updates to WebEx Integration to Outlook. ■ Help—Lets you look up instructions for using WebEx Integration to Outlook. ■ About—Lets you view the version number and licence and patent information about WebEx Integration to Outlook.
Schedule Meeting	<p>Clicking this button opens the Outlook Appointment window, which now contains Integration to Outlook options for scheduling an online or Audio Only meeting.</p> <p>Note The Meeting window in Outlook also contains the WebEx integration options.</p>
One-Click Meeting	<p>If you have not yet set up a One-Click Meeting, clicking this button opens the One-Click Setup page on your WebEx service Web site, on which you can set up a One-Click Meeting. If you have already set up a One-Click Meeting, clicking this button starts the meeting.</p> <p>A One-Click Meeting is an instant meeting that you can start at any time, without having to schedule the meeting. For details, refer to the user's guide on your WebEx service Web site.</p>

Checking for updates to Integration to Outlook

You can periodically check for updates to WebEx Integration to Outlook. If an update is available, Integration to Outlook also asks you whether you want to install the update.

To check for updates to Integration to Outlook:

- 1 Start Microsoft Outlook if it is not already open.
- 2 On the Outlook toolbar, click **WebEx**, and then choose **Check for Update**.

Uninstalling WebEx Integration to Outlook

At any time, you can uninstall the WebEx Integration to Outlook add-in from your computer.

To uninstall Integration to Outlook:

- 1 Exit Microsoft Outlook.
- 2 Ensure that no Outlook processes are still running on your computer, by doing either of the following:
 - Reboot your computer.
 - Terminate any running Outlook processes, as follows:
 - Press **Ctrl+Alt+Delete** on your computer's keyboard.
 - Click **Task Manager**.
 - Click the **Processes** tab.
 - Select the **OUTLOOK.EXE** process.
 - Click **End Process**.
- 3 Do *either* of the following:
 - Open the Windows Add/Remove Programs utility on your computer, select WebEx Integration to Outlook, and then select the option to remove the program.
 - Double-click the Integration to Outlook Setup program (olkInt.msi), and then follow the instructions to remove the program.

Scheduling a Meeting

If you want to...	See...
get an overview of scheduling a meeting using Integration to Outlook	<i>About scheduling a meeting on page 7</i>
specify your WebEx account information	<i>Specifying your account information on page 8</i>
set up a meeting and invite attendees to the scheduled meeting	<i>Setting up a meeting and inviting attendees on page 8</i>
assign a delegate to schedule or edit meetings for you	<i>Assigning a delegate to schedule meetings for you on page 19</i>

About scheduling a meeting

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

- You must verify your WebEx account information. For details, see *Specifying your account information on page 8*.
- 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 18*.
- 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.

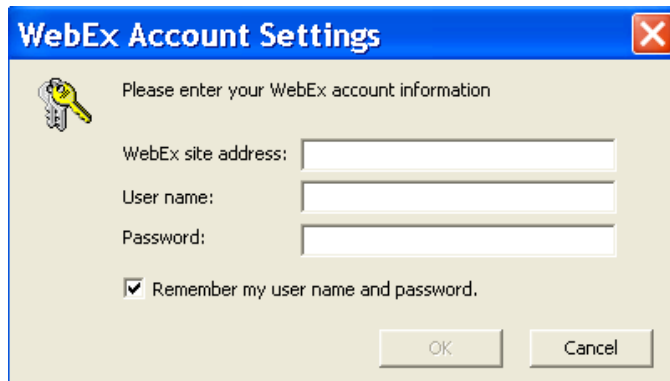
Specifying your account information

To set up an online meeting in Microsoft Outlook, you must specify your WebEx account information first.

To specify your WebEx account information:

- 1 In Microsoft Outlook, on the WebEx toolbar, click **WebEx**.
- 2 On the menu that appears, choose **Account Settings**.

The WebEx Account Settings dialog box appears.



- 3 In the WebEx site address text box, type the URL for your WebEx service Web site.
- 4 In the User name text box, type your user name for your meeting service.
- 5 In the Password text box, type your password.
- 6 Optional. To let Outlook log you in to your WebEx service automatically when you schedule a meeting or access the My WebEx area on your WebEx service site, select **Remember my user name and password**.
- 7 Click **OK** to save your account settings.

Setting up a meeting and inviting attendees

If you want to...	See...
set up a meeting using Integration to Outlook	<i>Setting up a meeting</i> on page 9
invite attendees to a scheduled meeting	<i>Inviting attendees</i> on page 11
learn what each WebEx option does	<i>About the WebEx Settings dialog box</i> on page 12
specify a recurring meeting	<i>Specifying a recurrence pattern for a meeting</i> on page 18

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.

To set up a meeting using Integration to Outlook:

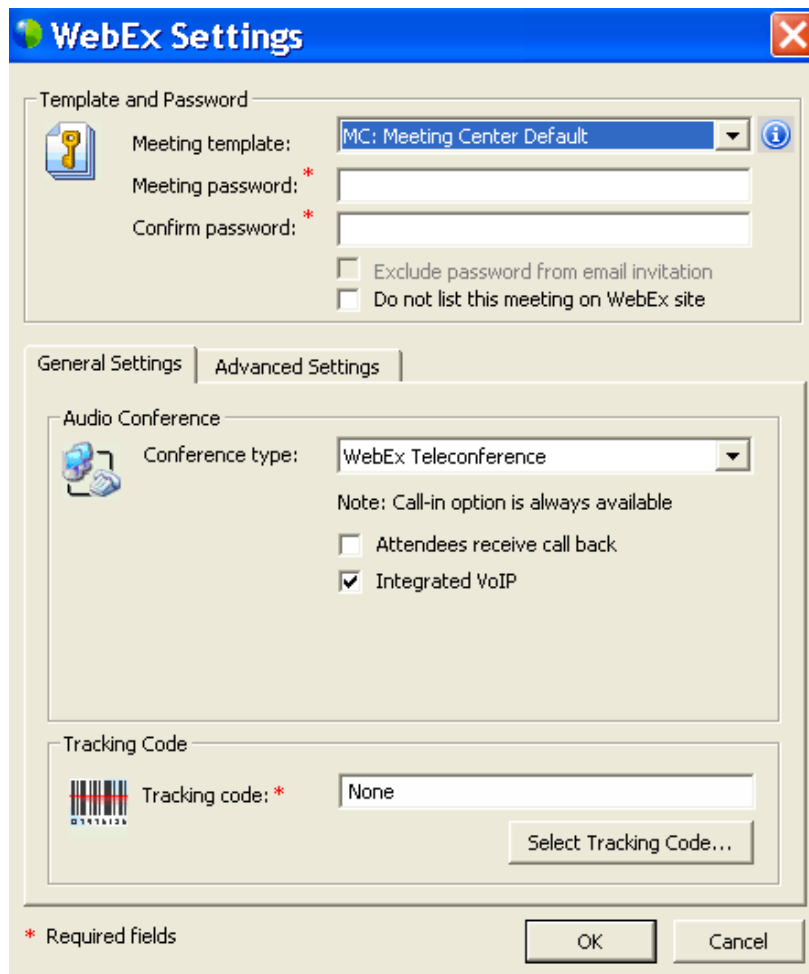
- 1 Do *either* of the following in Microsoft Outlook:
 - Click **Schedule Meeting** on the WebEx toolbar.
 - On the **File** menu, choose **New > Meeting Request or Appointment**.

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, click **Recurrence**, and then select recurrence options. For details, see *Specifying a recurrence pattern for a meeting* on page 18.
 - Optional. Specify other options that Microsoft Outlook provides, such as a meeting reminder.
- 3 Click **Add WebEx Meeting** to specify meeting settings.
 - 4 If the WebEx Account Settings dialog box appears, type the necessary information, and then click **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 click **OK**.
For details, see *About the WebEx Settings dialog box* on page 12.
- 6 Do *one* of the following, as appropriate:

- Send meeting invitation to attendees. For details, see *Inviting attendees* on page 11.
- Click **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.

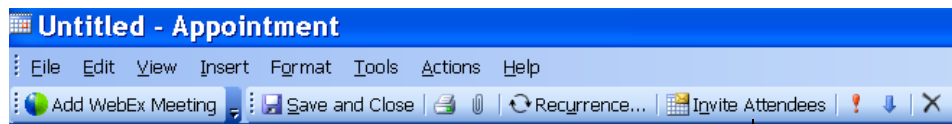
Once you invite an attendee to a scheduled meeting, he or she receives an invitation email message. The email message includes information about the meeting—including its password—and a link that the attendee can click to join the meeting.

You can customize the meeting invitation templates. For details, see *About customizing meeting invitation templates* on page 27.

To send meeting invitation:

- 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, click **Invite Attendees** to see the **To** box. The following figures show an example.



After you click **Invite Attendees**, the **To** box appears, in which you can enter attendees' names or email addresses.



To remove the **To** box, in which you can enter attendees' names or email addresses and invite them, click **Cancel Invitation**.

2 Enter attendees' names or email addresses in the **To** box, and then click **Send**.



Note Any attendees that you invite using WebEx Integration to Outlook do not appear in the attendees list for the meeting on your WebEx service Web site.

About the WebEx Settings dialog box

How to access the WebEx Settings dialog box:

In an open Meeting or Appointment window, click **Add WebEx Meeting** or **Change Settings**, as appropriate.


What you can do in the WebEx Settings dialog box:

Set options for your online meeting.

The following tables describe what you can do with each option.

Basic settings:

Template and Password

Use this option ...	To ...
Meeting template	<p>Select a template that contains the meeting settings that you or your site administrator saved on your WebEx service site. Once you select a template, WebEx Integration to Outlook automatically selects the settings or options in the dialog box. You can change the settings later if necessary.</p> <p>To view the content of a template, click .</p> <p>Note If this drop-down list displays only service types, your WebEx service site may not have been updated for the latest service version. Please contact your account manager for more information.</p>
Meeting password	<p>Specify a password that attendees use to join the meeting.</p> <p>Note Your site administrator may require that all passwords comply with security criteria, such as a minimum length and a minimum number of letters, numbers, or special characters. Contact your site administrator for details.</p>
Confirm password	<p>Confirm the password you typed.</p>
Exclude password from email invitation	<p>Specify that the invitation email message that Integration to Outlook sends to invited attendees does not contain the meeting password.</p> <p>If you select this option, you need to notify attendees of the password, if there is one, by other methods, such as by phone or instant messaging.</p> <p>Note If you require registration, this option is automatically selected. After you approve an attendee's registration request, the attendee receives another automatic email message that includes the password. For more information, see <i>Attendee Information</i> on page 15.</p>
Do not list this meeting on WebEx site	<p>Specify that the meeting does not appear on the calendar on your WebEx service Web site. Attendees must provide the meeting number to join the meeting.</p>

General Settings tab:

Audio Conference

Use this option ...	To ...
<p>WebEx Teleconference</p>	<p>Specify that the meeting includes an integrated WebEx teleconference. Instructions for joining a teleconference appear on participants' screens once they join the meeting.</p> <p>If you select this option, you can select <i>one</i> or <i>both</i> of the following:</p> <ul style="list-style-type: none"> ■ Attendees receive call back: Meeting participants provide their phone numbers when they join the meeting and receive a call back. When the participant answers the call, a voice prompt instructs the participant about how to join the teleconference. The meeting host or the host's organization assumes the charges for participants' calls. ■ Integrated VoIP: Meeting participants use computers with audio capability to communicate over the Internet rather than the telephone system. <p>The call-in option is always available for WebEx teleconference. When a participant calls the provided phone number, a voice response system guides the participant through the process of entering the meeting number and his or her caller ID to join the teleconference. If your site provides toll-free call-in teleconferencing, both a toll-free number and a toll number are available. The toll number allows participants who cannot use the toll-free number—such as participants in countries other than the U.S. or Canada—to join the teleconference.</p> <p>If your site includes toll-free call-in teleconferencing, your organization assumes the charges for the calls. Otherwise, participants assume the charges for their calls.</p> <p>If your site includes international local call-in numbers, you can select Allow access to teleconference via international local call-in numbers for attendees to join the meeting by dialing a local number.</p>
<p>Other Teleconference</p>	<p>Specify that the meeting includes a teleconference that another service provides, such as a third-party teleconferencing service or internal teleconferencing system, such as a PBX (private branch exchange). If you select this option, type instructions for joining the teleconference in the box. The instructions will display in the following instances:</p> <ul style="list-style-type: none"> ■ the invitation email message that you send using Integration to Outlook ■ a message box when an attendee joins the meeting. <p>You can also select Integrated VoIP, which allows meeting participants to use computers with audio capability to communicate over the Internet rather than the telephone system.</p>

Use this option ...	To ...
Use VoIP Only	Specify that the meeting includes only Integrated VoIP, which allows meeting participants to use computers with audio capability to communicate over the Internet rather than the telephone system.
None	Specify that the meeting does not include either teleconference or Integrated VoIP.

Tracking Code

Use this option ...	To ...
Tracking code	<p>Identify your department, project, or other information that your organization wants to associate with your meetings. Tracking codes can be optional or required, depending on how your site administrator set them up.</p> <p>If your site administrator requires you to enter a code from a predefined list, click Select Tracking Code, and then type a tracking code or select one from the drop-down list.</p>

Advanced Settings tab:

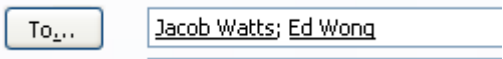
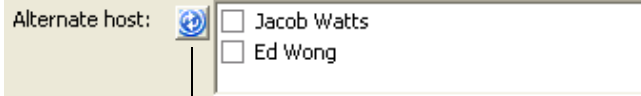
Attendee Information

Use this option ...	To ...
Require attendee registration	<p>Specify that all attendees must register to attend the meeting. An attendee cannot attend the meeting until you accept his or her registration request.</p> <p>You can require attendees to provide additional information when registering for a meeting, by editing the meeting on your WebEx service Web site and using the registration options available on your site. For details, see the online Help on your WebEx service Web site.</p> <p>Not available for all WebEx service sites.</p> <p>Note If you require registration, the Exclude password from email invitation check box in the WebEx Settings dialog box is automatically selected. After you approve an attendee's registration request, the attendee receives another automatic email message that includes the password. For more information, see <i>Template and Password</i> on page 13.</p>
Automatically accept all registration requests	<p>Accept all registration requests automatically, and let all registrants attend the meeting. You do not receive registration requests. If this option is not selected, you must accept or reject each registration request individually, using the options on your WebEx service Web site. For details, see the online Help on your WebEx service Web site.</p> <p>Not available for all WebEx service sites.</p>

Use this option ...	To ...
<p>Attendees can join meeting X minutes before starting time</p>	<p>Allow attendees to join the meeting earlier than the meeting's scheduled starting time. If you select this option, specify in the drop-down list how early they can join the meeting.</p> <p>Available only if your site administrator has turned on this option for your WebEx service; not available for all WebEx service sites.</p> <p>Note If you select this option, you can automatically share a presentation document once a participant joins the meeting. This option is useful if you want to inform or entertain participants while they wait for you to start the meeting. For details, see <i>Meeting Options</i> on page 16.</p>
<p>Attendees can also join teleconference before starting time</p>	<p>Allow attendees to join an integrated WebEx teleconference earlier than the meeting's scheduled starting time.</p> <p>Available only if you select Attendees can join meeting X minutes before starting time.</p>

Meeting Options

Use this option ...	To ...
<p>Info tab template</p>	<p>Select 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 host, teleconference phone numbers, and host key, if you are the host.</p> <p>Not available for all WebEx service sites; not applicable to Audio Only meetings.</p>

Use this option ...	To ...
<p>Alternate host</p>	<p>Designate one or more attendees as alternate hosts for the meeting. An alternate host can start the meeting and act as the host. Therefore, an alternate host must have a user account on your WebEx service Web site. If there are multiple alternate hosts for the meeting, the alternate host who starts the meeting first is the temporary host while the other alternate hosts can join the meeting only as attendees.</p> <p>If you join the meeting after an alternate host has started it, you automatically assume the host role.</p> <p>To view a list of attendees in this box, ensure that you entered their names or email addresses in the To box in the main Meeting or Appointment window.</p>  <p>To designate one or more attendees as alternate hosts, select the attendees in the list that appears in this box. To select multiple attendees, hold down your keyboard's Ctrl key.</p>  <p>Click this button to refresh the list.</p>
<p>Automatically play presentation</p>	<p>Specify that a presentation or document that you select here is shared automatically for participants who join the meeting before you do. The presentation or document appears in each participant's content viewer once he or she joins the meeting. If the presentation has multiple slides or pages, they advance automatically every 20 seconds.</p> <p>The file that you select must:</p> <ul style="list-style-type: none"> ■ be in the WebEx Universal Communications Format (UCF). For information about creating UCF files, refer to the guide <i>Getting Started with WebEx Universal Communications Toolkit</i>, which is available on your WebEx service Web site. ■ reside in your personal folders, which reside in My Files in the My WebEx area of your WebEx service Web site. You can select a UCF file that is already in your folders, or you can upload a new file to your folders and then select it while scheduling a meeting. <p>Clicking Upload opens the Add/Select Presentation page on your WebEx service Web site, on which you can select a presentation or document that already exists in your personal folders, or upload a new file to your folders and then select it. When you finish selecting a file, click Done to close the Add/Select Presentation page.</p>

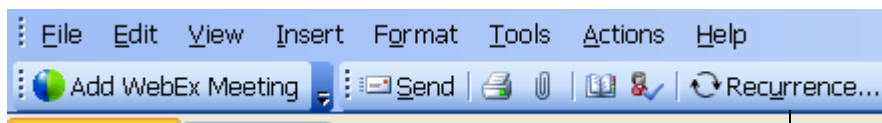
Specifying a recurrence pattern for a meeting

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. 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 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. To learn which recurrence patterns that Integration to Outlook does not support, see *Recurrence patterns that Integration to Outlook does not support* on page 18.

To specify a recurrence pattern for an online meeting:

- 1 In the Meeting or Appointment window for the meeting, click **Recurrence**.



Click **Recurrence** to set a recurrence pattern for your meeting.

- 2 Specify the options in the dialog box, and then click **OK**.

Recurrence patterns that Integration to Outlook does not support

The following are the recurrence options in Microsoft Outlook that Integration to Outlook does *not* support:

- weekly—Every [X] week(s) on [Monday/Tuesday/Wednesday/Thursday/Friday/Saturday/Sunday]
For this option, the value of X must always be 1 to be scheduled correctly both in Microsoft Outlook and on your WebEx service Web site.
If you schedule a meeting that repeats every X week, where X is greater than 1, in Microsoft Outlook, the meeting will be scheduled as you specify in Outlook, but will appear as a weekly meeting on your WebEx service site.
- monthly—The [first/second/third/fourth/last] [day/weekday/weekend day] of every [X] month(s)
For this option, you can select only a specific day of the week, such as Monday, Tuesday, Wednesday, Thursday, Friday, or Saturday, *not* [day], [weekday], or [weekend day].
- yearly—The [first/second/third/fourth/last] [day/weekday/weekend day] of

every

[January/February/March/April/May/June/July/August/September/October/November/December]

For this option, you can select only a specific day of the week, such as Monday, Tuesday, Wednesday, Thursday, Friday, or Saturday, *not* [day], [weekday], or [weekend day].

For Audio Only meetings, all repeating meetings must end within one year. Also, Integration to Outlook does *not* support the following recurrence options:

- weekly—Every [X] week(s) on [Monday/Tuesday/Wednesday/Thursday/Friday/Saturday/Sunday]

For this option, the value of X must always be 1—that is, the pattern must be every week.

- monthly by day—Day [X] of every [X] month(s)

The value of X in every [X] month must always be 1—that is, the pattern must be every month.

- monthly by day of the week—The [second/third/fourth/last] [day/weekday/weekend day] of every [X] month(s)

The value of X in every [X] month must always be 1—that is, the pattern must be the first [Monday/Monday/Tuesday/Wednesday/Thursday/Friday/Saturday] of every month.

- yearly



Note If you use 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 service Web site.

Assigning a delegate to schedule meetings for you

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

To assign a delegate to schedule meetings for you, do both of the following:

- On your WebEx service Web site, give the delegate scheduling permission. For

details, see *Assigning a delegate on your WebEx service Web site* on page 20.

- In Microsoft Outlook, select the delegate and share your calendar with him or her. For details, see *Assigning a delegate in Microsoft Outlook* on page 21.



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 service Web site

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

If you want to go to the My WebEx Profile page without using Microsoft Outlook, you can log in to your WebEx service Web site, and then click **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 21.

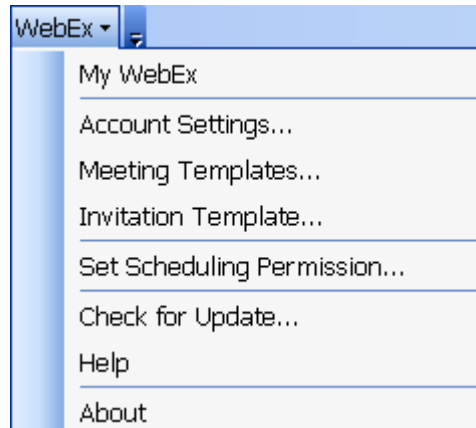


Important

- 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.
-

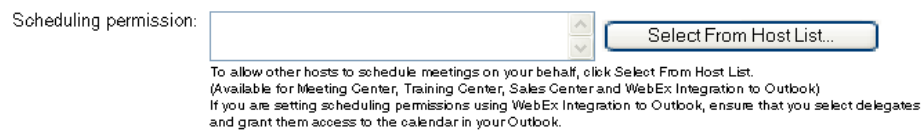
To assign a delegate on your WebEx service Web site:

- 1 In Microsoft Outlook, click **WebEx**.
- 2 On the menu that appears, choose **Set Scheduling Permission**.



The My WebEx Profile page appears.

3 Click Select From Host List.



- 4** In the Select Hosts window that appears, select the email address of the delegate, and then click **Add > OK**.
- 5** Click **Update**.

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 20.



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 **Tools** menu, choose **Options**.

- 2 On the **Delegates** tab, click **Add**.
- 3 Select the delegate's name, and then click **OK**.
- 4 In the Delegate Permissions dialog box, select **Editor** in the **Calendar** drop-down list, and then click **OK**.



- 5 Click **Apply** > **OK**.

Scheduling for Another Host

If you want to...	See...
get an overview of scheduling on behalf of another host	<i>About scheduling a meeting for another host</i> on page 23
schedule a meeting or an appointment for another host	<i>Scheduling a meeting or an appointment for another host</i> on page 24

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 site administrator.
- The WebEx Integration to Outlook add-in program is installed in your Microsoft Outlook.
- The actual host does the following:
 - gives you scheduling permission on the WebEx service Web site. For details, see *Assigning a delegate on your WebEx service Web site* on page 20.

- selects you as a delegate in Microsoft Outlook and shares his or her calendar with you. For details, see *Assigning a delegate in Microsoft Outlook* on page 21.



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 25.
 - At any time, the actual host can remove scheduling permission from you.
-

Scheduling a meeting or an appointment for another host

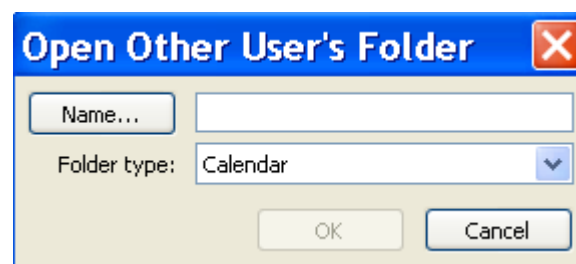
Delegates only

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

To schedule a meeting or an appointment for another host:

- 1 Open the other host's calendar in Microsoft 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**.

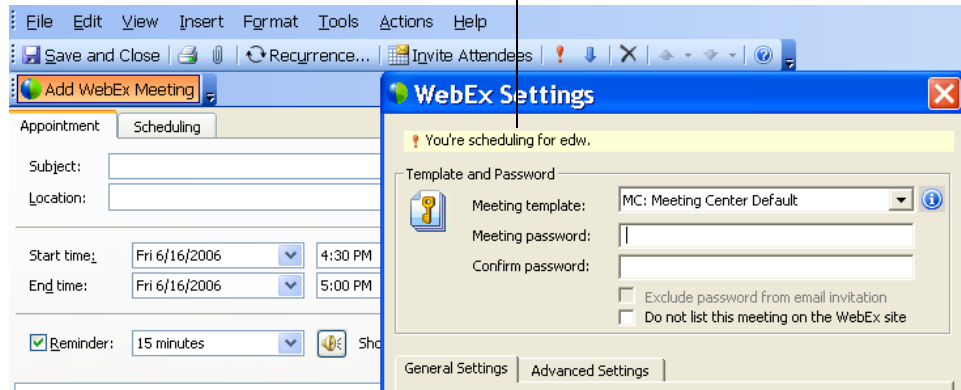
The shared calendar appears.



Note There are multiple ways of opening another person's calendar, depending on how you customize your views in Microsoft 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. For details, see *Setting up a meeting* on page 9.

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



You can also edit or cancel the meeting you scheduled. For details, see *Editing a scheduled meeting* on page 33 and *Canceling a meeting* on page 34.

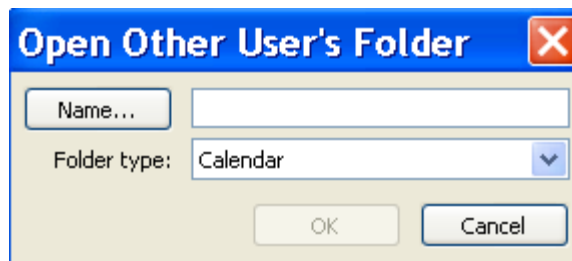
Starting a meeting for another host

Once you schedule a meeting for another host, the actual host receives a confirmation email message in his or her Microsoft Outlook. First ensure that the actual host still shares his or her calendar with you in Microsoft 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 Microsoft 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 service Web site.

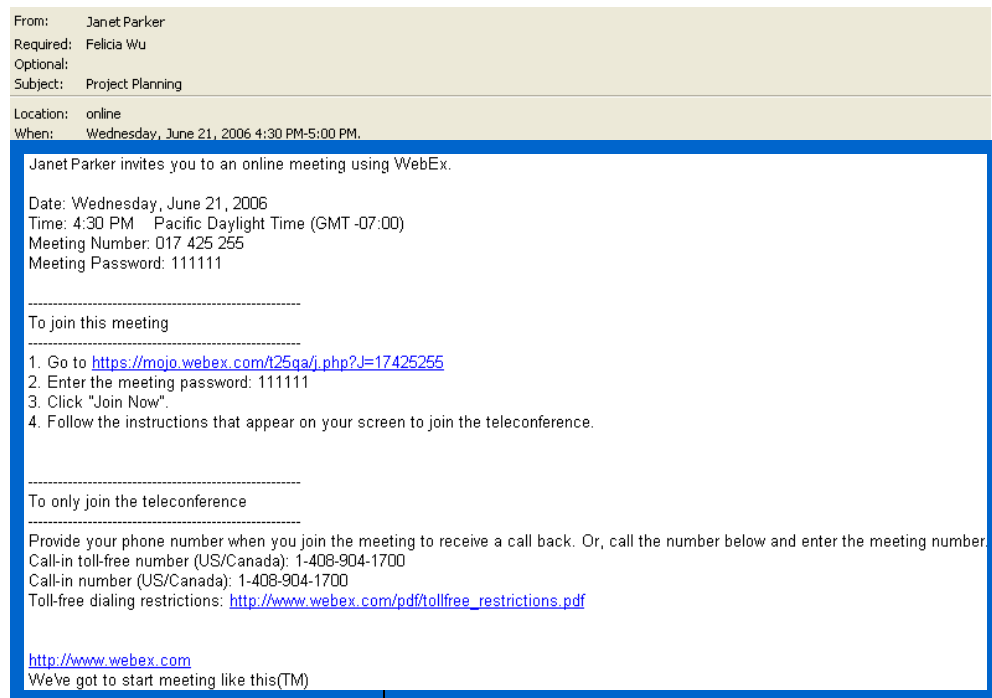
Customizing Meeting Invitation Templates

If you want to...	See...
get an overview of customizing meeting invitation templates	<i>About customizing meeting invitation templates on page 27</i>
customize meeting invitation templates	<i>Customizing your meeting invitation on page 30</i>

About customizing meeting invitation templates

Integration to Outlook provides a template for meeting invitations that you send to attendees. The information in the template appears in the text area of Microsoft Outlook invitation email messages.

The following figure shows an example.

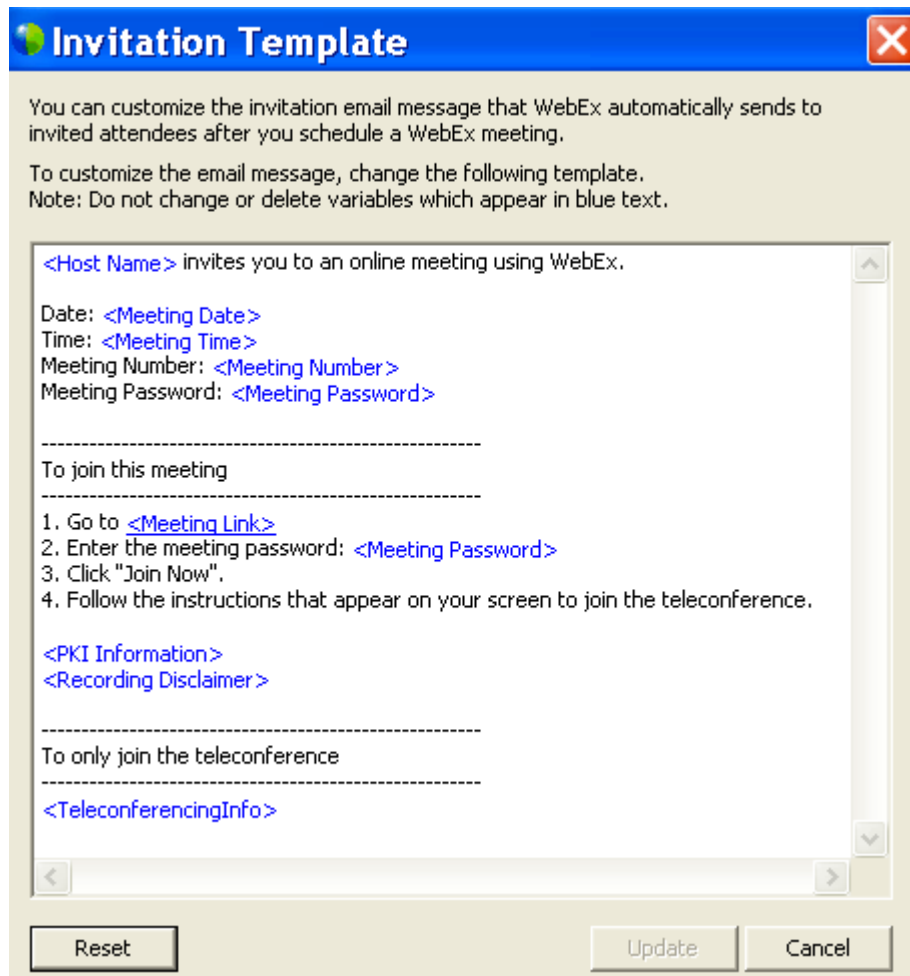


This area contains information from the invitation template.

About variables in the invitation template

You can customize the invitation template by editing the default text or rearranging variables——codes that your WebEx service recognizes and substitutes with your specific meeting information.

The following figure shows an example of the template.



The default invitation template provides the following variables.

Variable	Displays ...
<Host Name>	your first and last names, as they appear in your user profile on your WebEx service Web site.
<Meeting Date>	the date on which the meeting occurs, as it appears in the Start time box in your meeting invitation.
<Meeting Time>	the time on which the meeting occurs, as it appears in the Start time box in your meeting invitation.
<Meeting Number>	the unique number that your WebEx service assigns to a meeting. For an unlisted meeting, participants must provide the meeting number to attend the meeting.
<Meeting Password>	the password for the meeting, as you specified it in the WebEx Settings dialog box when scheduling the meeting.

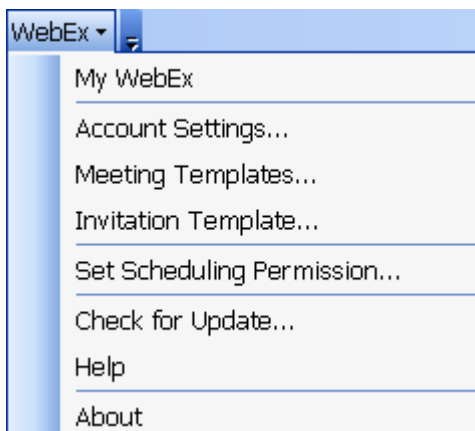
Variable	Displays ...
<TeleconferencingInfo>	information about how to join a teleconference for the meeting. Integration to Outlook automatically displays the information for the type of teleconference you selected in the WebEx Settings dialog box when scheduling the meeting. If you selected the Other teleconference option, this variable displays the information that you provided.
<Meeting Link>	the Web address, or URL, that attendees can click to join the meeting.
<Recording Disclaimer>	a statement that reads: This meeting service includes a feature that allows audio and any documents and other materials exchanged or viewed during the session to be recorded. By joining this session, you automatically consent to such recordings. If you do not consent to the recording, do not join the meeting.
<PKI Information>	Public Key Infrastructure measures, such as digital certificates, which attendees are required to obtain to prevent any meeting data from being disclosed on the server.

Customizing your meeting invitation

If you customize the template, you can reset it to its default state at any time, regardless of whether you removed any variables.

To customize the meeting invitation template:

- 1 In Microsoft Outlook, on the toolbar, click **WebEx**, and then choose **Invitation Template**.



- 2 In the Invitation Template window, edit the message.

For details about editing the template, see *About variables in the invitation template* on page 28.

- 3 Click **Update**.

To reset the meeting invitation template to its default state:

- 1** In Microsoft Outlook, on the toolbar, click **WebEx**, and then choose **Invitation Template**.

The Invitation Template window appears.

- 2** Click **Reset**.

Editing and Canceling Scheduled Meetings

If you want to...	See...
edit a scheduled meeting	<i>Editing a scheduled meeting</i> on page 33
cancel a scheduled meeting	<i>Canceling a meeting</i> on page 34

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, click **Change Settings**.
- To remove the WebEx meeting settings previously set, click **Cancel WebEx Meeting**.
- To add or change a recurrence pattern, click **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, click **Send Update**.
- To save the updated meeting to your Outlook calendar, click **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 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 recommends that you apply the changes to the entire series of the meeting.
-


Canceling 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 service Web site and cancels, or removes, the meeting from your site. A message appears, confirming that your meeting was removed.

To cancel a scheduled meeting:

1 In Microsoft Outlook, do *any* of the following:

- Open the meeting item. On the toolbar, click .
- Open the meeting item. On the **File** menu, choose **Delete**.
- Select the meeting item in the calendar. Right-click, and then choose **Delete**.

2 Choose whether to notify invited attendees or not, and then click **OK**.



- 3 Click **OK** in the confirmation box.

Starting a Meeting

If you want to...	See...
get an overview of starting a meeting	<i>About starting a meeting on page 37</i>
start your scheduled meeting from Outlook	<i>Starting a meeting from Microsoft Outlook on page 37</i>
start your scheduled meeting from your WebEx service Web site	<i>Starting a meeting from your WebEx service site on page 38</i>

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 meeting from Microsoft Outlook

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

The following figure shows an example of a meeting item.

To...	John Knight		
Subject:	Project Planning		
Location:	online		
Start time:	Wed 6/21/2006	4:30 PM	<input type="checkbox"/> All day event
End time:	Wed 6/21/2006	5:00 PM	
<input type="checkbox"/> Reminder:	15 minutes		Show time as: <input checked="" type="checkbox"/> Busy
Meeting Workspace...	<input type="checkbox"/> This is an online meeting using:	Microsoft NetMeeting	

You scheduled this meeting.

Date: Wednesday, June 21, 2006
Time: 4:30 PM Pacific Daylight Time (GMT -07:00)
Meeting Number: 017 425 255
Meeting Password: 111111

To start this meeting

1. Go to <https://mojo.webex.com/t25qa/j.php?S=17425255>
2. Log in to your account.
3. Click "Start Now".
4. Follow the instructions that appear on your screen to join the teleconference.

Click this link to start your 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 click to join the meeting. For more information, see *Joining a meeting from the invitation email*.

Starting a meeting from your WebEx service site

Log in to your WebEx service Web site, and then start the meeting from the My WebEx Meetings page in the My WebEx area on your WebEx service site.

For more information about starting a scheduled meeting on your WebEx service Web site, refer to the documentation on your site.

Joining a Meeting

If you want to...	See...
get an overview of joining a meeting	<i>About joining a meeting on page 39</i>
join a meeting from the invitation email message	<i>Joining a meeting from the invitation email on page 39</i>
join a meeting from the WebEx service Web site	<i>Joining a meeting from the WebEx service Web site on page 40</i>

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 click 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 click the appropriate link in the message 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.

From: Janet Parker
Required: Felicia Wu
Optional:
Subject: Project Planning

Location: online
When: Wednesday, June 21, 2006 4:30 PM-5:00 PM.

Janet Parker invites you to an online meeting using WebEx.

Date: Wednesday, June 21, 2006
Time: 4:30 PM Pacific Daylight Time (GMT -07:00)
Meeting Number: 017 425 255
Meeting Password: 111111

To join this meeting

1. Go to <https://mojo.webex.com/t25qa/j.php?J=17425255>
2. Enter the meeting password: 111111
3. Click "Join Now".
4. Follow the instructions that appear on your screen to join the teleconference.

To only join the teleconference

Provide your phone number when you join the meeting to receive a call back. Or, call the number below and enter the meeting number.
Call-in toll-free number (US/Canada): 1-408-904-1700
Call-in number (US/Canada): 1-408-904-1700
Toll-free dialing restrictions: http://www.webex.com/pdf/tollfree_restrictions.pdf

<http://www.webex.com>
We've got to start meeting like this(TM)

Click this link to join the meeting.

Joining a meeting from the WebEx service Web site

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

They may need the following to join a meeting:

- 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.
- 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.

Once attendees select the meeting on the WebEx site, they can click **Join Now** to join the meeting.

For more information about joining a meeting on your WebEx service Web site, see the documentation on the site.

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