

WebEx Integration to Outlook (version 3.1) provides a convenient way for you to schedule, start, or join WebEx meetings using Microsoft Outlook. Once you install Integration to Outlook, new options appear in Microsoft Outlook, allowing you to quickly schedule an online meeting. You can invite attendees using any of your Outlook address lists, and after you have sent out the invitation, the meeting will automatically appear on your Outlook calendar. Attendees, however, do *not* need to use Integration to Outlook to join the meeting. You can also use this integration to schedule meetings for another host. For instructions on how to do this, refer to the *Scheduling for Another Host* job aid.

Installing Integration to Outlook

Before installing Integration to Outlook, verify that:

1. Your computer is connected to the Internet.
2. Microsoft Outlook is closed.

To Install Integration to Outlook:

1. Log in to your WebEx Service.
2. On the left navigation bar, click **Assistance**, and then **Support**.
3. Scroll to the **Downloads** section of the page.
4. Click **Download My Outlook Integration to WebEx** and follow the installation prompts.

Note: If your site administrator has enabled the feature, the **Install Desktop Productivity Tools** page may be displayed. Under Outlook Integration, click **Install** and follow the installation prompts.

Optional: From the Support page, click **Integration to Outlook User's Guide** if you would like more detailed information about installing and using WebEx from Outlook.

Specifying Account Settings

Before you schedule your first WebEx meeting using Outlook, you must set up your WebEx account settings.

1. Open Microsoft Outlook.
2. From the *WebEx Integration* toolbar, click **WebEx** and select **Account Settings** from the drop-down menu. *The WebEx Account Settings dialog box appears.*
3. **WebEx Site Address:** Type the URL for your WebEx site.
4. **Username:** Type your WebEx user name.

5. **Password:** Type your WebEx password.
6. Optionally, select the **Remember my user name and password** check box to let Outlook log in to your WebEx service automatically when you schedule a meeting, or access the *My WebEx* area on your WebEx service site.
7. Click **OK**.

Scheduling a WebEx Meeting in Outlook

The WebEx Integration toolbar appears in Microsoft Outlook after you have completed the installation. You can use this toolbar to start One-Click Meetings, schedule a WebEx meeting, and access your WebEx site.



To Schedule a Meeting in Outlook:

1. On the *WebEx Integration* toolbar click **Schedule Meeting**. *A new appointment message appears.*
2. Enter your meeting subject, agenda, date and time, and invite attendees as you normally would using Outlook.

Note: If this is a recurring meeting, Integration to Outlook supports the recurrence options available on your WebEx service site.
3. Click **Add WebEx Meeting**. *The WebEx Settings dialog box appears.*
4. Select a template to use for the meeting. *Meeting templates are created on your WebEx service site and determine the basic settings that will be used for the meeting.*
5. Enter and confirm a **Meeting Password**.
6. Optionally, select the **Exclude password from email invitation** check box for added security if you do not want to include the password in the meeting invitation. Remember that you'll need to communicate the password to attendees by another method.
7. Optionally, select the **Do not list...** check box to make your meeting "unlisted" and unavailable from the *Browse Meetings* page on your WebEx site.



To Specify General Settings:

1. Select an option under *Audio Conference*.

Use this option...	To specify that the meeting...
WebEx Teleconference	Includes a WebEx integrated teleconference. Instructions for joining the teleconference appear on participants' screens when they join the meeting.
Other Teleconference	Includes a teleconference that another service provides, such as a third-party teleconferencing service or internal teleconferencing system.
Use VoIP Only	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	Does not include either teleconference or Integrated VoIP. Participants will only be able to communicate in the meeting via chat.

2. **Tracking code:** if your organization uses tracking codes, verify that the correct tracking code is displayed, or click **Select Tracking** code to select a new tracking code.
3. Click the **Advanced Settings** tab.

To Specify Advanced Settings:

On the *Advanced Settings* tab, select the **Attendee Information** options.

Use this option...	To...
Require Attendee Registration	Specify that all attendees must register to attend the meeting.
Automatically accept all registration requests	Accept all registration requests automatically, and let all registrants attend the meeting.
Attendees can join meeting X minutes before starting time	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.

Use this option...	To...
Attendees can also join teleconference before starting time.	Allow attendees to join an integrated WebEx teleconference earlier than the meeting's scheduled starting time. (Only available if the option above is selected.)

To Select Meeting Options:

Use this option...	To...
Info tab templates	Determine the meeting details displayed on the <i>Meeting Info</i> tab.
Auto-play a presentation before host joins the meeting	Upload a presentation or document in .ucf format to display while attendees are waiting for the meeting to start.
Assign an alternate host	Assign host privileges to a second person.

To Send Your Meeting Invitation:

Click **Send** when you have finished scheduling and setting your WebEx preferences. Your attendees will receive an email invitation with a link to the meeting, and the meeting will be added to your Outlook calendar and the scheduled meetings list on your My WebEx page.

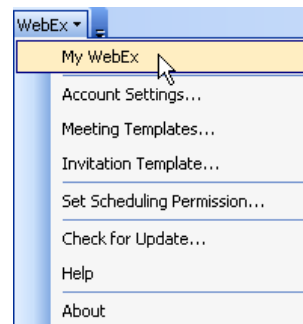
Starting a Meeting from Outlook

To Start a WebEx Meeting from Outlook:

1. Open the meeting on your Microsoft Outlook calendar and click the meeting hyperlink.

OR

From the WebEx Integration toolbar, click **WebEx**, and select **My WebEx** from the menu options to go to your WebEx site.



2. Log in to your WebEx site and click **Start Now** to start your meeting.

