

Cisco Webex Meetings

Integration to Microsoft Outlook in the Webex Meetings Desktop App

Integration to Microsoft Outlook Introduction Using the Webex Meetings Desktop App | Start a Meeting in Microsoft Outlook Using the Webex Meetings Desktop App | Schedule a Meeting in Microsoft Outlook Using the Webex Meetings Desktop App | Allow Someone to Schedule Webex Meetings on Your Behalf in Microsoft Outlook Using the Webex Meetings Desktop App | Enable the Webex Meetings Desktop App in Microsoft Outlook (Windows)

Integration to Microsoft Outlook Introduction Using the Webex Meetings Desktop App

Learn how to configure the Cisco Webex Meetings integration to Microsoft Outlook. With the Cisco Webex Meetings desktop app, you can join and schedule meetings, and configure settings, all within Outlook.

Webex Meetings Integration to Microsoft Outlook

The integration to Microsoft Outlook is part of the Cisco Webex Meetings desktop app, and gives you an easy way to schedule, start, and join meetings from Microsoft Outlook.

Your site administrator may have installed the Cisco Webex Meetings desktop app for you. If not, you can download it from your Webex site.

Meeting invitees aren't required to use Outlook to join meetings that you schedule in Outlook and only need a Webex account if the meeting is restricted to Webex users on your site.

Webex Meetings Integration to Microsoft Outlook Toolbar Options

The integration to Microsoft Outlook adds a button and a drop-down list to the Home ribbon in Outlook. To access your schedule meeting options, go to Schedule Meeting > More. Most options are self-explanatory, but some require an explanation.

- Meeting Templates—View templates that you or your site administrator saves on your Webex site. The templates contain meeting settings, you can choose from them to suit the needs of your meeting. Meeting templates are only available if your site administration enables them.
- Set Scheduling Permission—Opens the My Webex > Scheduling Options page on your Webex site, where you can assign a delegate to schedule or edit meetings on your behalf.
- My Meetings—Opens the Cisco Webex Meetings desktop app to the Meetings list, where you can view your scheduled Webex meetings.

Start a Meeting in Microsoft Outlook Using the Webex Meetings Desktop App

You can start Cisco Webex meetings that you're the host of directly from Microsoft Outlook. Starting meetings from Outlook can be faster because you don't have to sign in to your Webex site.

Start a Scheduled Webex Meeting

1. From Microsoft Outlook, go to your calendar, and open your meeting item.
2. Select Join Webex Meeting.

If you need the host key or host access code, click the link at the bottom of the meeting invite window. On your Webex site, select More Information.

Start a Personal Conference Meeting

1. From Microsoft Outlook, go to your calendar, and open the meeting item.
2. Dial the number provided.
3. Follow the voice prompts and enter your host access code. If prompted, enter your PIN.

Start an Instant or Personal Room Meeting

From Microsoft Outlook, on your toolbar, select Meet Now.

Instant meetings by default are held in your Personal Room. To change this setting, sign in to your Webex site, and go to My Webex > Preferences > "Meet Now" Settings. Uncheck the Use Personal Room for all my instant meetings check box.

Schedule a Meeting in Microsoft Outlook Using the Webex Meetings Desktop App

Schedule, edit, or cancel meetings from Microsoft Outlook. Learn the prerequisites for scheduling a meeting and discover the various types of meetings that you can schedule.

Schedule a Meeting

Not all the features available for scheduling meetings on your Webex site are available in the Cisco Webex Meetings desktop app. The integration to Microsoft Outlook does not support all the recurrence options that are available in Microsoft Outlook, for more information see the tables below.

In any meeting invitations that you send from Microsoft Outlook, the meeting start time appears in the time zone that is set on your computer, and may not match the time zone preferences you have set on your Webex site.

1. From the Home ribbon in Microsoft Outlook, select Schedule Meeting.
2. In the drop-down list, choose from the following:
 - Schedule Webex Meeting—Webex meetings are the standard meeting choice.
 - Schedule Personal Room Meeting—Personal Rooms are your own virtual conference room. It's always available and you don't have to book it.
 - Schedule Personal Conference Meeting—Personal Conference meetings are for meetings using telephony service provider (TSP) audio.
3. Select To and choose who you want to invite to your meeting.
4. Add a Subject and Location.
5. Choose the Start time and End time for your meeting.

This includes the date, time, and duration of the meeting.

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6. Enter any other necessary information in the email invitation and select Send.

Edit a Scheduled Meeting

Once you schedule a meeting using the integration to Microsoft Outlook, you can use Microsoft Outlook to edit it at any time. You can change the start time, specify a new password, choose a different audio connection option, and more.

When you edit a scheduled meeting an updated email invitation is sent to the invitees and the meeting information on your Webex site is updated.

1. On your Microsoft Outlook calendar, open the scheduled meeting item.
2. Change any of the following settings:
 - Change Settings—Change your Webex meeting settings.
 - Recurrence—Add or change a recurrence pattern.
 - To edit the text in your email invitation, type in the Appointment window.
3. Select Send Update.

Cancel a Scheduled Meeting

If you schedule a meeting using the integration to Microsoft Outlook, you can cancel the meeting in Microsoft Outlook at any time.

- If you cancel a Webex meeting using your Webex site, your changes will not show in Microsoft Outlook.
 - If you cancel a single occurrence of a recurring Webex meeting using Microsoft Outlook, the changes also show on your Webex site.
 - If you save the meeting or appointment after canceling your meeting and have not added another Webex meeting, Personal Room meeting, or Personal Conference meeting, it becomes a regular Microsoft Outlook meeting with no Webex information.
1. On your Microsoft Outlook calendar, open the scheduled meeting item.
 2. Select Cancel Meeting.
 3. Select Yes in the confirmation message.
 4. Select Send Cancellation.

Allow Someone to Schedule Webex Meetings on Your Behalf in Microsoft Outlook Using the Webex Meetings Desktop App

If you host Webex meetings regularly, you can delegate someone else to schedule, edit, cancel, and start meetings for you.

Assign a Delegate on the Webex Site

Your delegate must have a host account and have the Cisco Webex Meetings desktop app installed on their computer.

To give someone permission to manage your meetings, you have to give them scheduling permissions on your Webex site, and share your calendar with them in Microsoft Outlook.

1. Sign in to your Webex site and select My Webex.

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2. On the left navigation bar, go to Preferences > Scheduling Options.
 3. In the Scheduling permission text box, enter the email addresses of the hosts you want to give scheduling permission.
 4. Select Save at the bottom of the Preferences page.

Set Scheduling Permissions

Windows

1. From Microsoft Outlook, go to File > Account Settings > Delegate Access.
2. Select Add and find the name of the person you want to add as a meeting delegate.
3. In the Calendar field, select Editor and select OK.

Mac

1. From Microsoft Outlook, go to Tools > Accounts.
2. Select Advanced.
3. From the Delegates tab, select the plus + button under the Delegates who can act on my behalf: heading.
4. Enter the name of the person that you want to assign as a delegate and select Add.
5. In the Calendar field, select Editor and select OK.

Schedule, Manage, and Start a Meeting for Another Host

- Make sure that you and the host are both using the same version of the Cisco Webex Meetings desktop app.
- Make sure the host has given you scheduling permission on their Webex site.
- Make sure you are signed in to your own Webex account in the Cisco Webex Meetings desktop app.

Windows

1. From Microsoft Outlook, go to File > Open & Export > Other User's Folder.
2. Type the name of the host or select Name to select the actual host's name.
3. Select Calendar in the Folder type list and select OK.
4. **Select the host's calendar.**

Mac

1. From Microsoft Outlook, go to File > Open > Other User's Folder.
2. Type the name of the host or select Name to select the actual host's name.
3. Select Calendar in the Folder Type list and select Open.
4. **Select the host's calendar.**

Enable the Cisco Webex Meetings Desktop App in Microsoft Outlook (Windows)

Learn how to enable your Cisco Webex Meetings desktop app for Microsoft Outlook from the Start menu or directly from Microsoft Outlook.

Check Your Cisco Webex Meetings Desktop App Preferences

1. From the Windows Start menu, open the Cisco Webex Meetings desktop app.
2. Select the gear  icon.
3. From the drop-down list, select Preferences.
4. Select the Plug In tab.

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5. Make sure that the Microsoft Outlook check box is checked.

Check Your Microsoft Outlook Preferences

1. From Microsoft Outlook, go to File > Options > Add-ins.
2. At the bottom of the pop-up window, in the Manage drop-down list, select Disabled Items.
3. Select Go.
4. In the Disabled Items dialog box, select Add-in: ATLCOM Outlook Addin(ptolkadd.dll).
5. Select Enable and Close.