

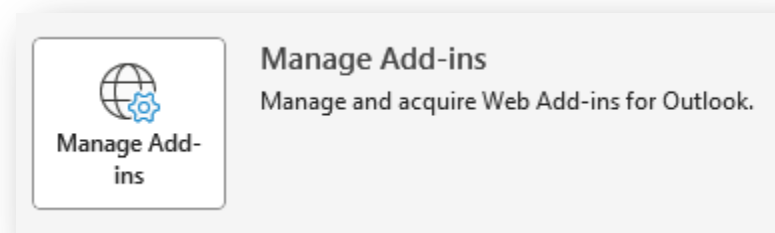
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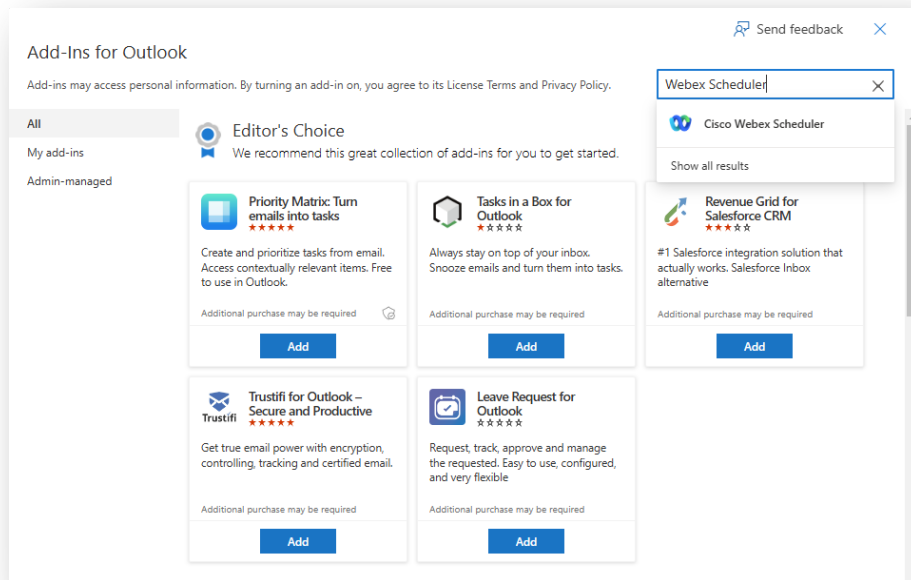
This guide provides step-by-step instructions for integrating Webex with Microsoft Outlook, enabling users to schedule Webex meetings directly within Outlook. It also outlines the available options before and after scheduling a meeting.

Step 1: Install the Webex Scheduler Add-In

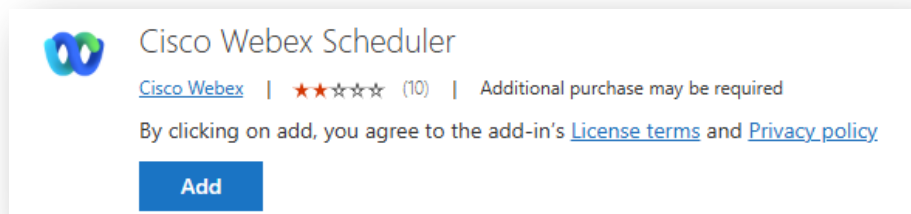
1. Open **Microsoft Outlook** on your desktop or web browser.
2. Navigate to the **File** tab and click on **Manage Add-ins**.
 - For Mac OS Users, while in Outlook go to **Tools > Get Add-ins**



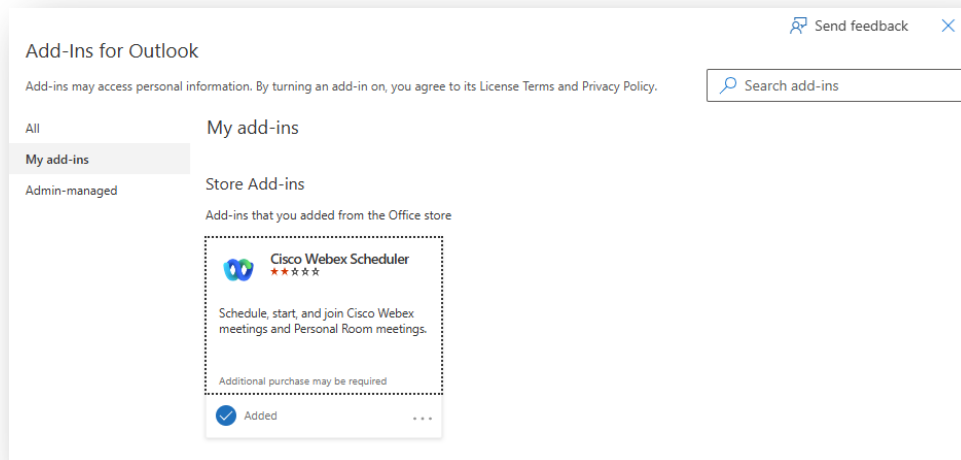
3. In the **Add-ins for Outlook** window, search for "Webex Scheduler."



4. Click on **Add** to install the Webex Scheduler add-in.



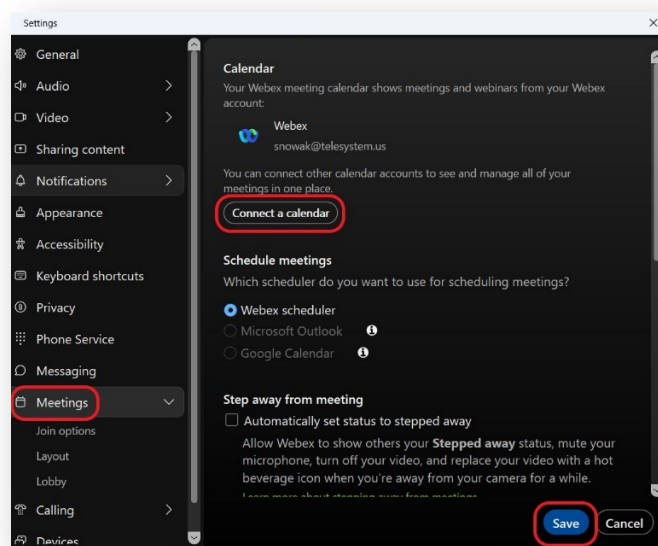
5. Verify the Webex Scheduler appears in the **My add-ins** menu



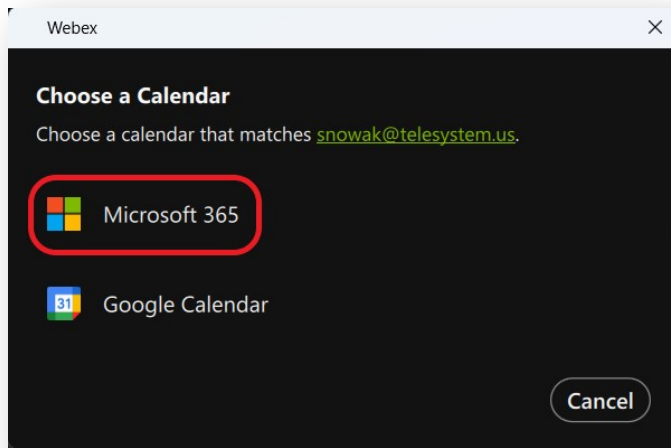
Step 2: Connect Microsoft Outlook calendar to Webex

Prior to scheduling Webex meetings through Outlook, it is required that you connect your Outlook Calendar to Webex.

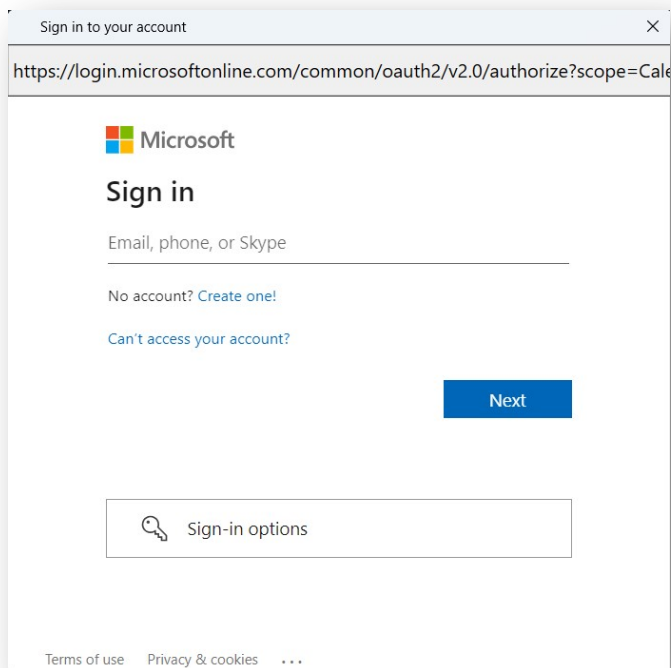
1. Open Webex
2. Open the Settings menu
3. Navigate to the Meetings section
4. Under Calendar, choose the Connect Calendar button



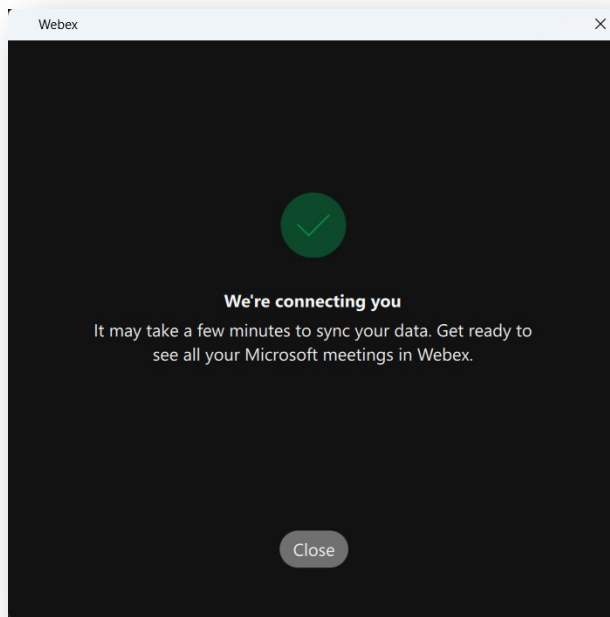
5. Choose the Microsoft 365 calendar



6. Sign in to your Outlook account with your credentials

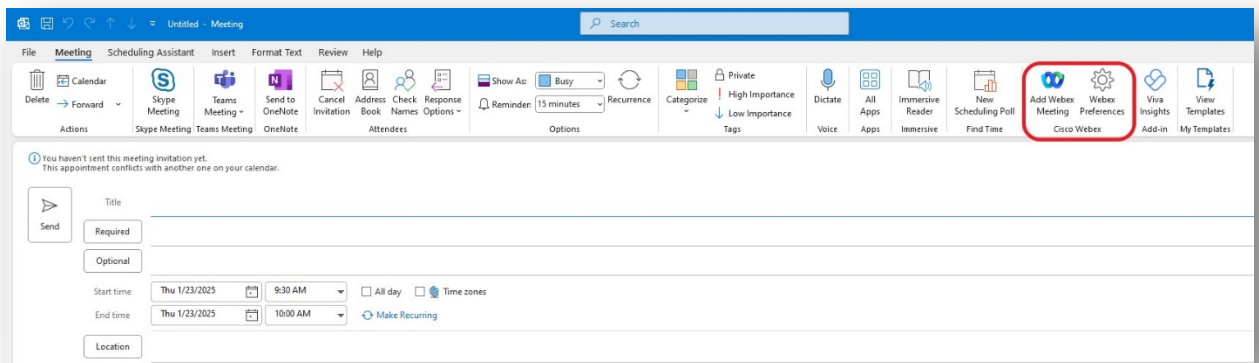


7. Once the Outlook credentials have been entered, close the confirmation screen



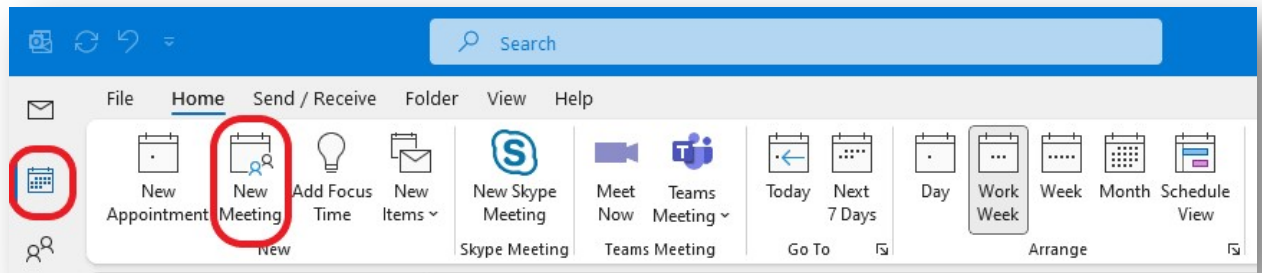
NOTE: Calendar synchronization may take up to 60-90 minutes to complete.

8. Once the Microsoft Outlook sync has completed, the Webex Scheduler icon will appear in your Outlook toolbar. The “Add Webex Meeting” icons will only be visible in the *New Meeting* window and not in the normal Calendar tab in Outlook

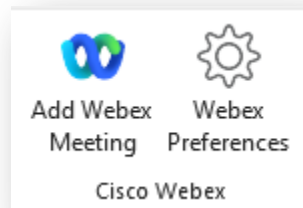


Step 3: Provisioning Webex Scheduler in Outlook

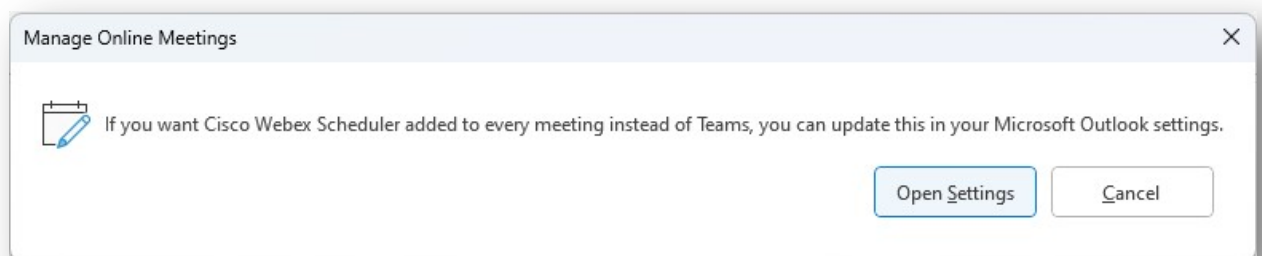
1. Open Outlook/Calendar and select **New Meeting** in top toolbar



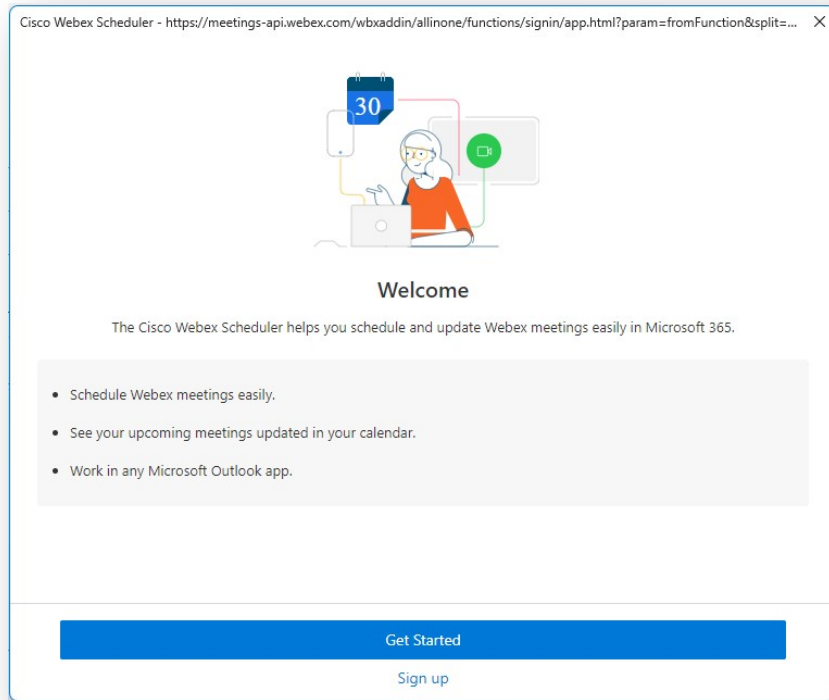
2. Click on the **Webex Preferences** icon in the Outlook Calendar/New Meeting window toolbar



3. The initial pop-up screen will allow you to set Webex as the default meeting selection for all new meeting invites if desired. This can be cancelled and set through the Outlook settings at a later date.




4. Select **Get Started** to proceed to the Webex credentials screens



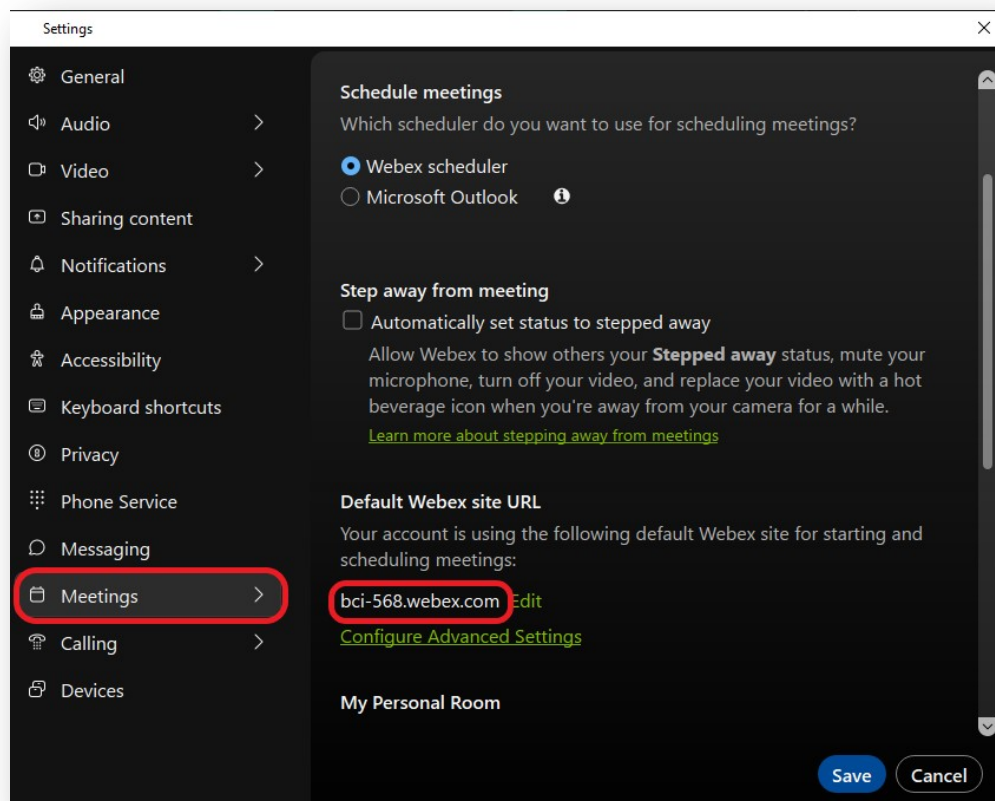
5. Enter your **Webex site URL**.

A screenshot of a web browser window titled "Cisco Webex Scheduler - https://meetings-api.webex.com/wbxaddin/allinone/functions/signin/app.html?param=fromFunction&split=...". The page asks "Which Webex site do you want to use?". There is a radio button next to the text "Enter your Webex site URL:", which is followed by an empty text input field. At the bottom, there is a large blue button labeled "Next". Below the button, small text reads "Version 45.2.0 © 2021 Cisco and/or its affiliates. Help".

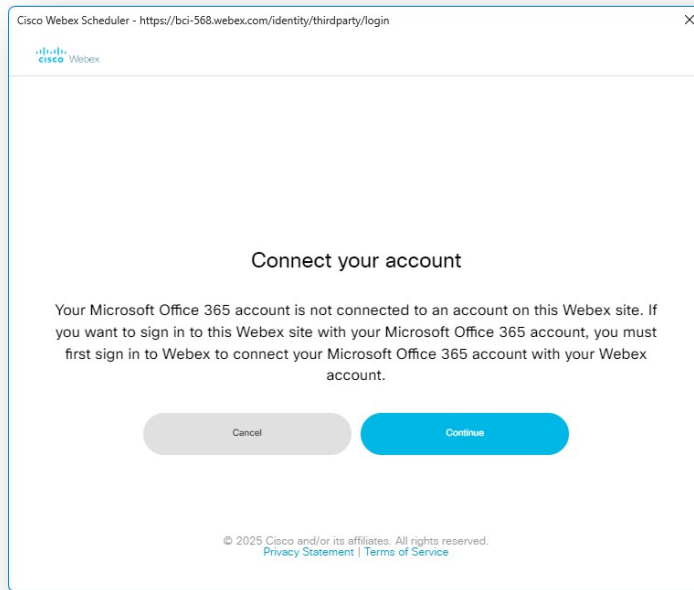
- a) The specific URL required for this step can be found under the Settings/Meetings section in Webex.

1. Click the Settings icon in the left menu in Webex 
2. Navigate to the Meetings section
3. Scroll down to the “Default Webex site URL” section
4. Capture the **xxx.webex.com** information

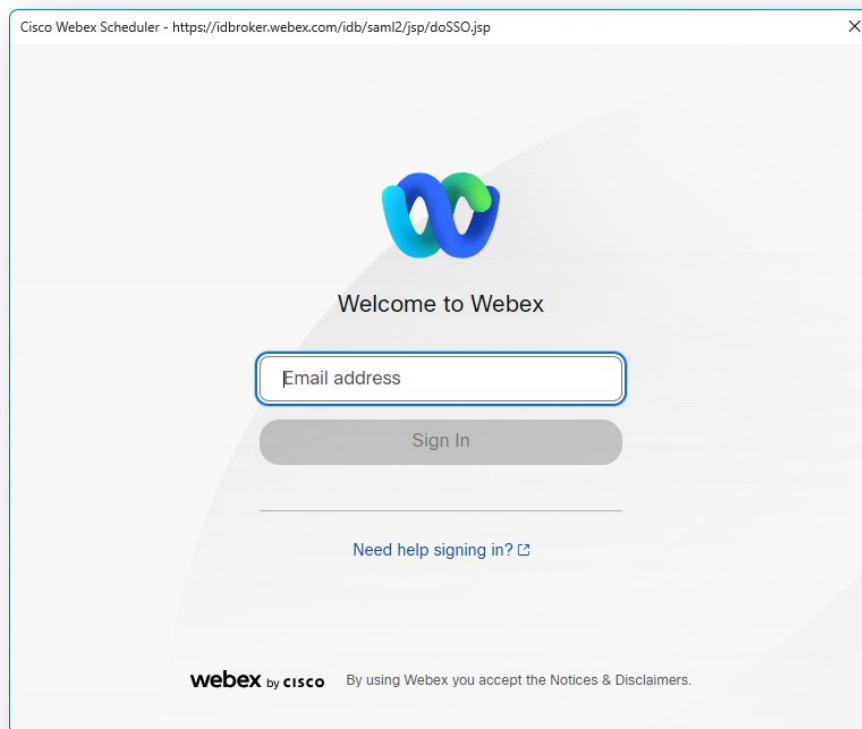
1. **NOTE:** **https://** (**https:// xxx.webex.com**) must be added to the front of the address when copied in the login window



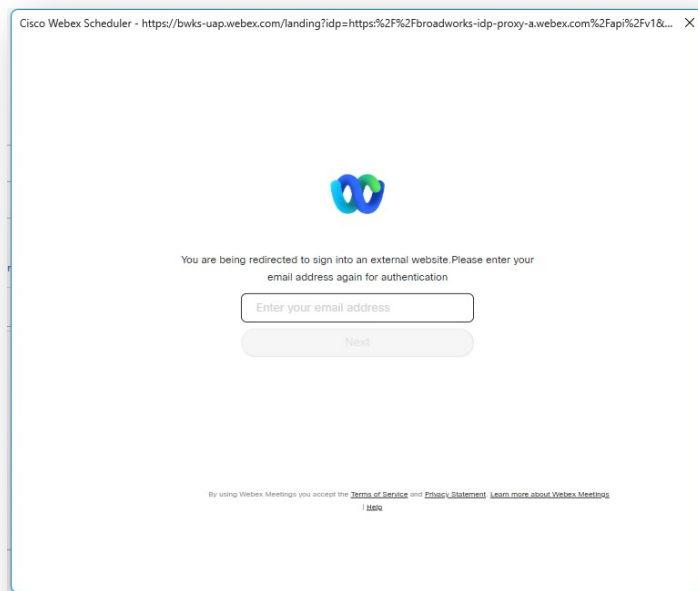
6. Connect your account. Select **Continue**




7. Enter the email address that is associated with your Webex account



8. Re-enter your Webex email address.



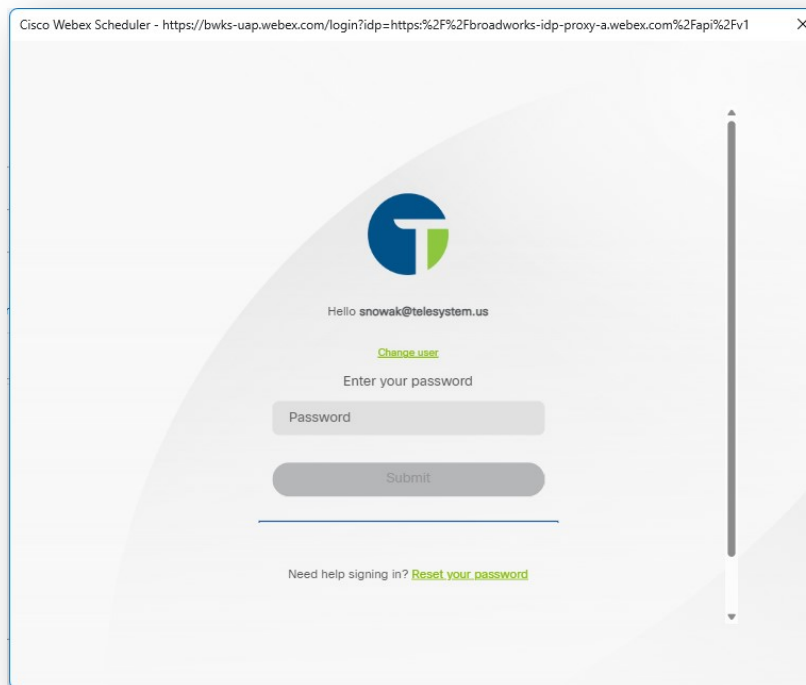
Cisco Webex Scheduler - <https://bwks-uap.webex.com/landing?idp=https%2F%2Fbroadworks-idp-proxy-a.webex.com%2Fapi%2Fv1&...>




You are being redirected to sign into an external website. Please enter your email address again for authentication.

By using Webex Meetings you accept the [Terms of Service](#) and [Privacy Statement](#). [Learn more about Webex Meetings](#)

9. Enter the password associated with your Webex account.



Cisco Webex Scheduler - <https://bwks-uap.webex.com/login?idp=https%2F%2Fbroadworks-idp-proxy-a.webex.com%2Fapi%2Fv1>



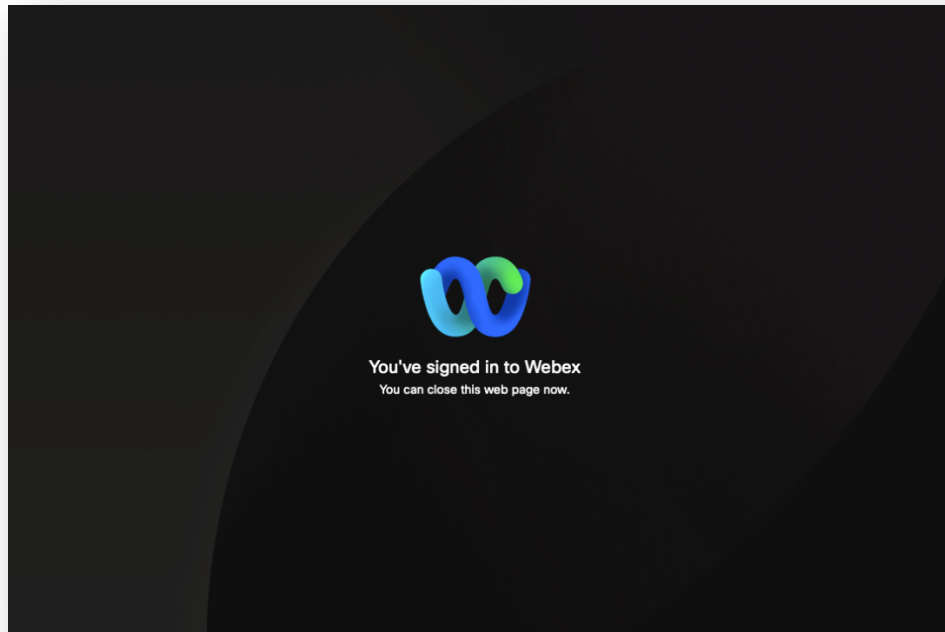
Hello snowak@telesystem.us

[Change user](#)

Enter your password

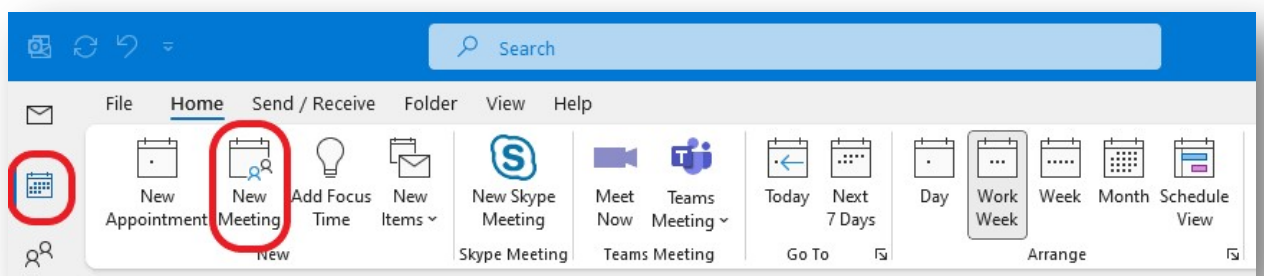
Need help signing in? [Reset your password](#)

10. Webex Scheduler provisioning is complete

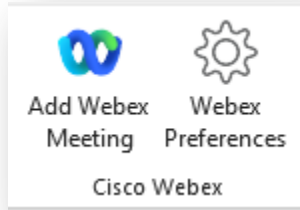


Step 4: Webex Meeting Preferences prior to scheduling a meeting

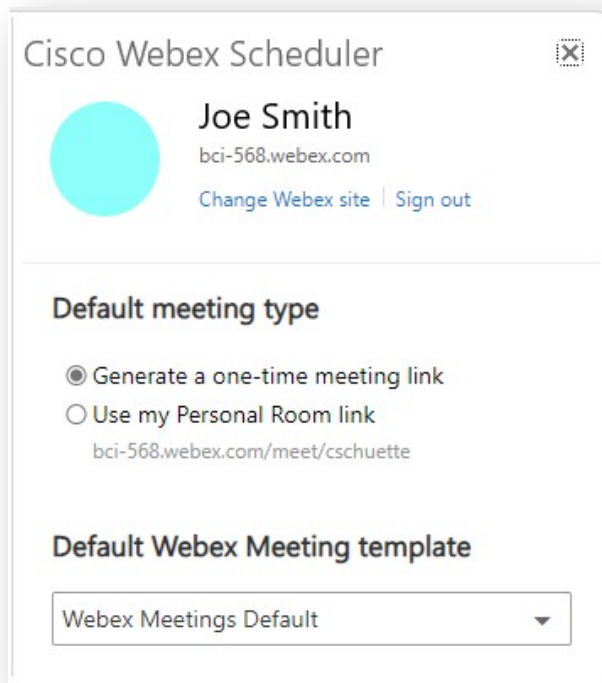
1. Open Outlook and create a new meeting invite.



2. In the event window, click on the **Webex Preferences** button (located in the toolbar).

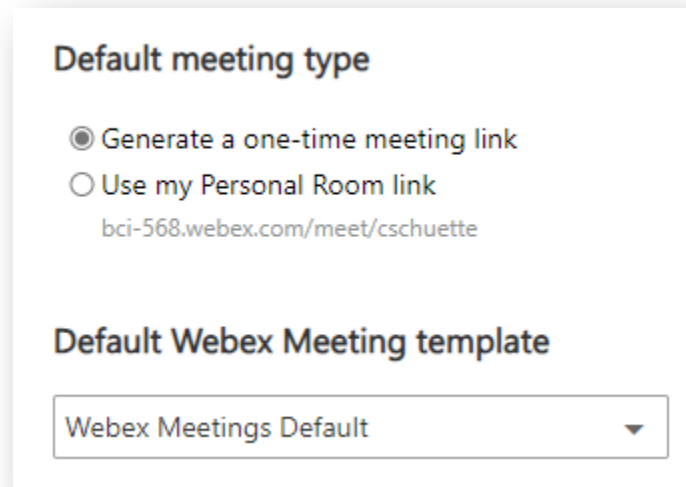


3. The Cisco Webex Scheduler menu will load on the right side of the screen



4. Choose between the two default meeting types:
 - **Generate a one-time meeting link:**
 - Creates a unique Webex meeting URL specifically for the scheduled event.
 - Ideal for meetings requiring higher security, as the link and associated details are not reusable.
 - Includes customizable options like passwords, waiting rooms, and unique participant access settings.

- Best for one-off meetings with people outside your organization or requiring a formal setup.
- Default Webex Meeting template
 - Left at default selection



The screenshot shows a settings window with two sections. The first section, 'Default meeting type', has two radio buttons: 'Generate a one-time meeting link' (which is selected) and 'Use my Personal Room link'. Below the second option is the URL 'bci-568.webex.com/meet/cschuette'. The second section, 'Default Webex Meeting template', features a dropdown menu with 'Webex Meetings Default' selected and a downward arrow on the right.

- **Use my Personal Room link:**
 - Utilizes a permanent, reusable link to your Webex Personal Room.
 - Convenient for recurring or informal meetings with familiar participants.
 - Faster setup since the link doesn't change, but it may have fewer security features than one-time links.
 - Best for team check-ins, quick discussions, or regular collaborations with the same group.

Default meeting type

☐ Generate a one-time meeting link

☒ Use my Personal Room link

bci-568.webex.com/meet/cschuette

Webex Personal Room meeting

Personal Room name

Chris Schuette's Personal Room

Meeting link

bci-568.webex.com/meet/cschuette

Video Address

cschuette@bci-568.webex.com

Host PIN ⓘ

0263

Step 5: How to Add a Webex Meeting to an Outlook Invite

1. In Outlook, go to your calendar and click **New Meeting** to create a meeting invite.
2. Fill in the basic meeting details, such as:
 - **Title:** Enter a descriptive title for your meeting.
 - **Attendees:** Add participant email addresses in the **Required/Optional** fields.
 - **Date and Time:** Set the date, start time, and end time for your meeting.
 - **Location:** Webex link will be automatically copied into the invite
3. Add Webex Meeting Details
 - In the meeting invite window, locate the Webex Scheduler toolbar and click on Add Webex Meeting.
 - This action automatically inserts the Webex meeting link, dial-in information, and other details into the meeting invite.
4. Customize Webex Meeting Preferences

Cisco Webex Scheduler

Webex meeting

Meeting template

Webex Meetings Default ▼

Meeting type

Webex Meetings Broadworks Premium ▼

Password

sG8fNHWvx25

☐ Don't include meeting password in email invitation ⓘ
You'll need to send the meeting password separately to invitees.

Cohosts

☐ The first person to join the meeting who has a host account on this site becomes a cohost

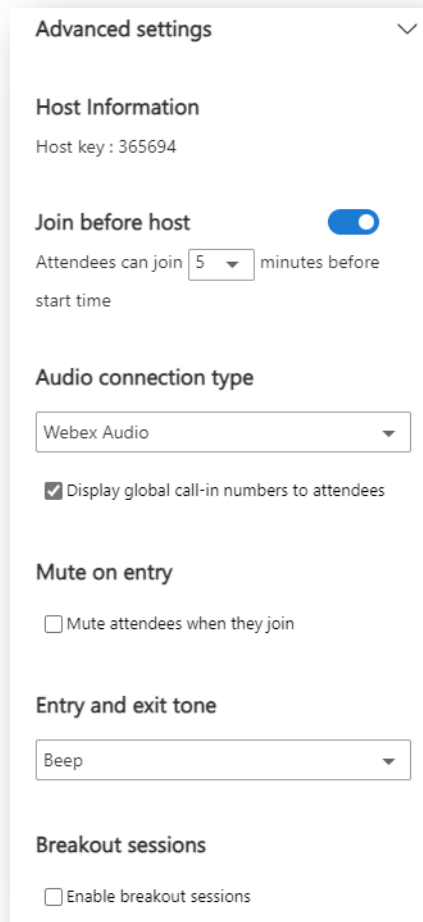
☐ All attendees who have host accounts on this site become cohosts when they join the meeting

☒ Let me choose cohosts for this meeting. ⓘ

- After adding the Webex meeting to your invite, you can click the **Webex Preferences** icon to tailor the meeting to your needs:
 - **Meeting Template:** Left at default selection
 - **Meeting Type:** Defaulted to Webex package assigned to your line
 - **Password:** Designate a password for attendees to utilize if required to join the meeting.
 - **Don't include meeting password in email invitation**
 1. If this option is checked, invitees won't see the meeting password in their email invitation, and when they click the join meeting link, the password won't be automatically entered for them. Users will need to enter the password to join the meeting, so you'll need to send it to them in a separate message
 - **Cohosts** – Choose between:

1. The first person to join the meeting who has a host account on this site becomes a cohost
2. All attendees who have host accounts on this site become cohosts when they join the meeting
3. Let me choose cohosts for this meeting

- **Advanced Settings**



The screenshot shows a mobile interface for 'Advanced settings'. It includes sections for 'Host Information' (Host key: 365694), 'Join before host' (enabled toggle, 5 minutes before start time), 'Audio connection type' (Webex Audio dropdown), 'Display global call-in numbers to attendees' (checked checkbox), 'Mute on entry' (unchecked checkbox), 'Entry and exit tone' (Beep dropdown), and 'Breakout sessions' (unchecked checkbox).

Advanced settings

Host Information
Host key : 365694

Join before host ☒
Attendees can join 5 minutes before start time

Audio connection type
Webex Audio

☒ Display global call-in numbers to attendees

Mute on entry
☐ Mute attendees when they join

Entry and exit tone
Beep

Breakout sessions
☐ Enable breakout sessions

- **Join before host** – enable and choose minute amount attendees can join before the meeting start time
- **Audio Connection Type** – select Webex Audio or Use VoIP Only
- **Display global call-in numbers to attendees** – enable/disable
- **Mute on Entry** – mute attendees when they join
- **Entry and Exit Tone** – enable/disable beep

- **Breakout Sessions** – enable breakout sessions

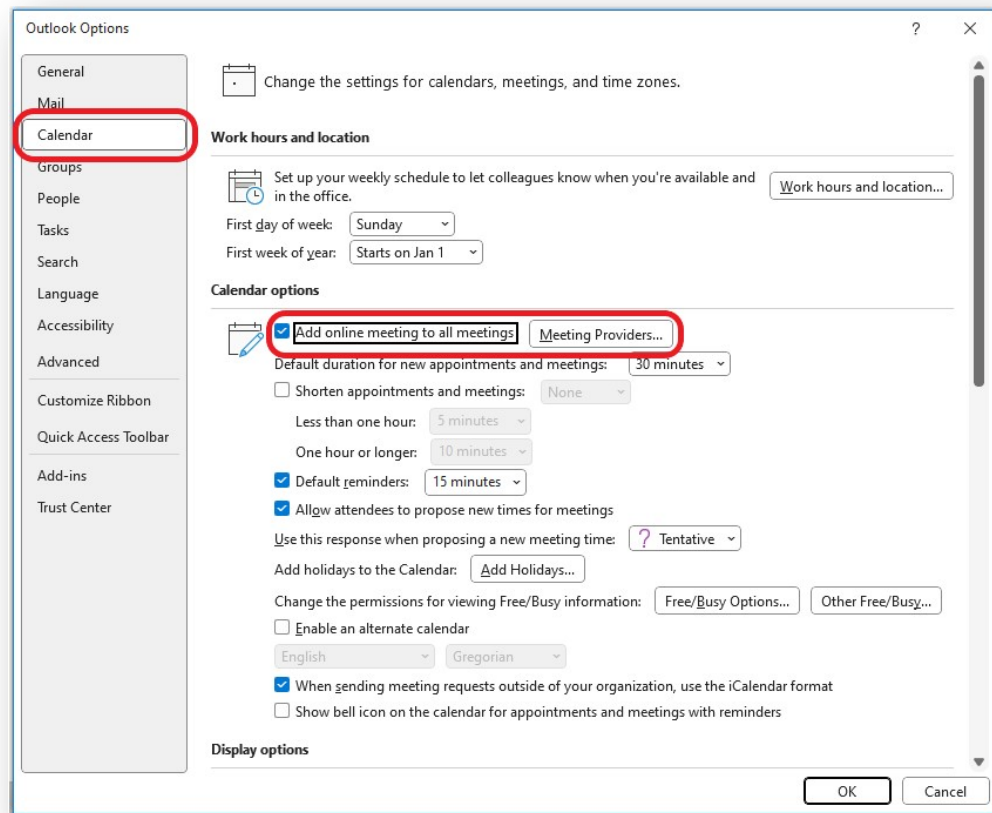
5. Finalize and Send the Invite

- Review the meeting invite to ensure all details are accurate.
- Add any additional information or instructions for attendees in the body of the invite.
- Click **Send** to distribute the meeting invite to all participants.

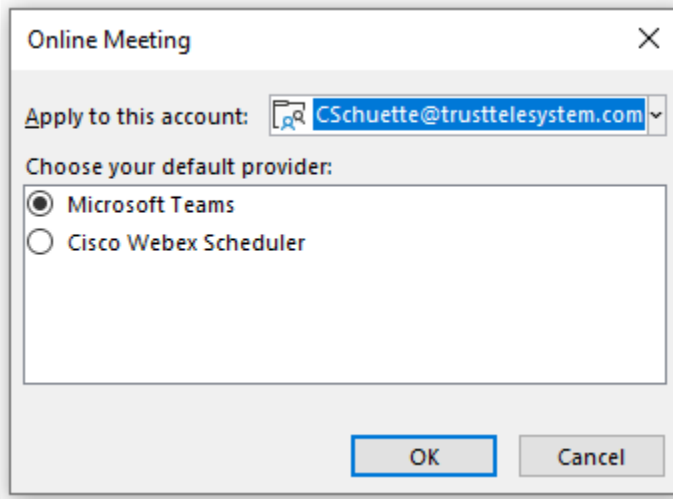
Step 6: Updating the Default Meeting Provider for New Invites

This option will allow you to choose whether you want an online meeting automatically added to every new invite created and what provider you prefer.

1. Open Outlook and navigate to the File tab/Options menu
2. In the Options menu, select the Calendar section
3. Under Calendar Options, the first checkbox allows you to automatically add online meetings to all new invites and choose the default provider
4. Click the Meeting Providers button



5. Choose the default provider from the list between Microsoft Teams and Cisco Webex Scheduler.



6. Once a new meeting invite is created, a link for the default provider selected will automatically be added to the body of the invite.