

Job Aid: Scheduling Webex Meetings in Outlook

What is the Webex Meeting Plugin?

The City of Chandler has added a Webex Meeting plugin to the Outlook desktop client. With one click, users can create a Webex session when scheduling a meeting. Users can choose to [Schedule a WebEx Meeting](#) or a [Schedule a Personal Room Meeting](#). Meetings can be scheduled from the Outlook top-menu ribbon or from the Outlook calendar.

Note: The Schedule Personal Conference Meeting option only provides a phone number and does not allow computer access; therefore, it is not recommended.

Schedule Webex Meeting Invite

A WebEx meeting invite contains links that are unique to the meeting. Anyone who is invited can attend even if the host does not. Additionally, cohosts can be added. This option is best for meetings that require a room or meetings that require planning ahead.

1. Log into your City of Chandler Outlook account.
2. To schedule a meeting from the Outlook ribbon, select **Schedule a Webex Meeting** from the **Schedule Meeting** drop-down menu (Figure 1).

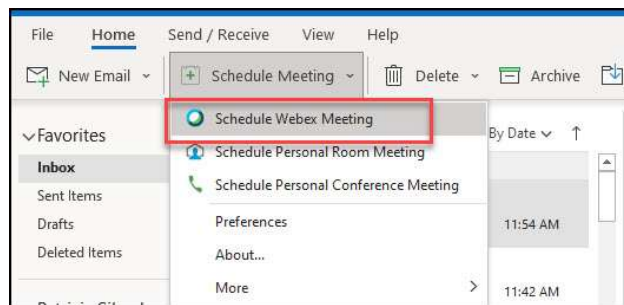


Figure 1

3. To schedule the meeting directly from the Outlook Calendar, click the **Calendar icon** on the lower-left menu. (See Figure 2).

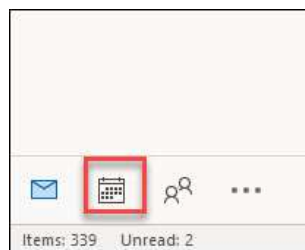


Figure 2

4. The calendar opens. Right click the time slot for your meeting and select **New Meeting Request**.

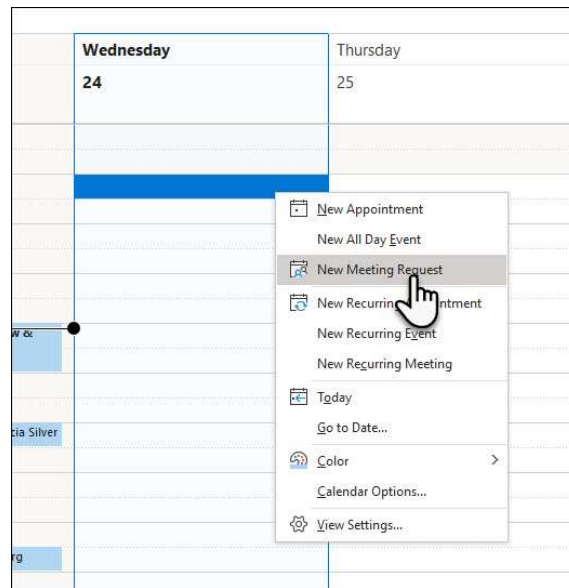


Figure 3

5. A meeting invite opens. Webex creates a placeholder as shown in Figure 4.

Note: Do **not** delete or change the placeholder.

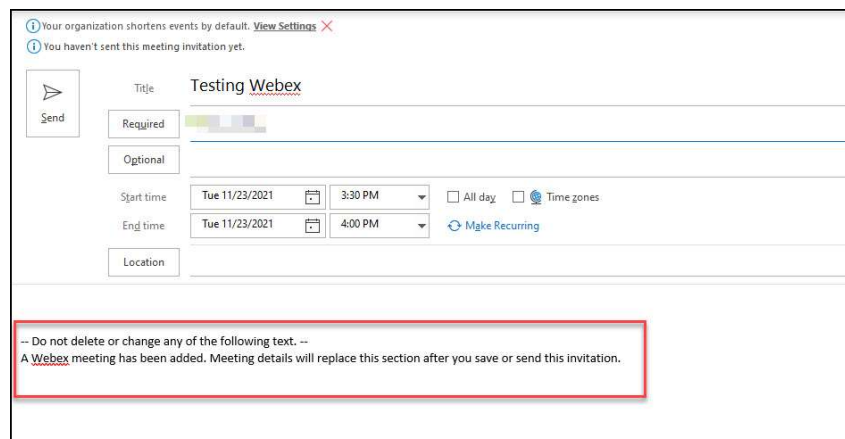


Figure 4

6. Select the required attendees and choose the time and date.
 - a. If you would like to take advantage of One Button to Push in a video conference room, add the video conference room name as a required attendee.

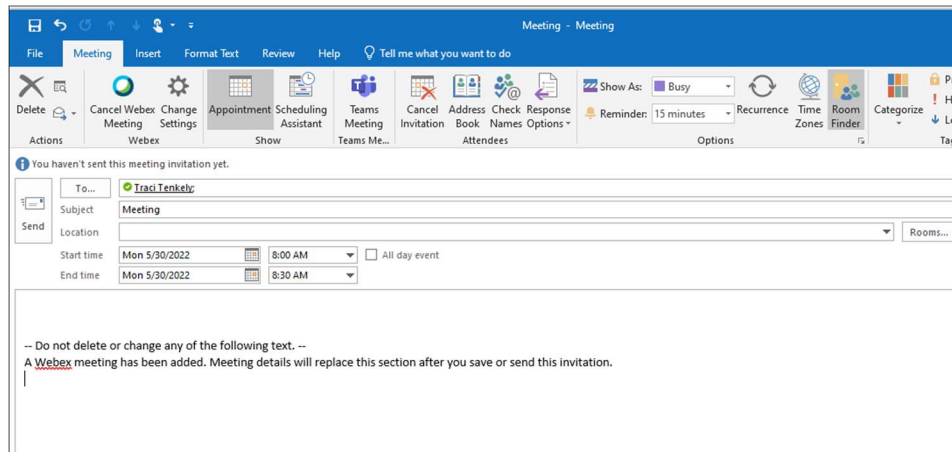


Figure 5

7. It is highly recommended to add a co-host in the event you are unable to start the meeting. Click **Change Settings** on the top ribbon.

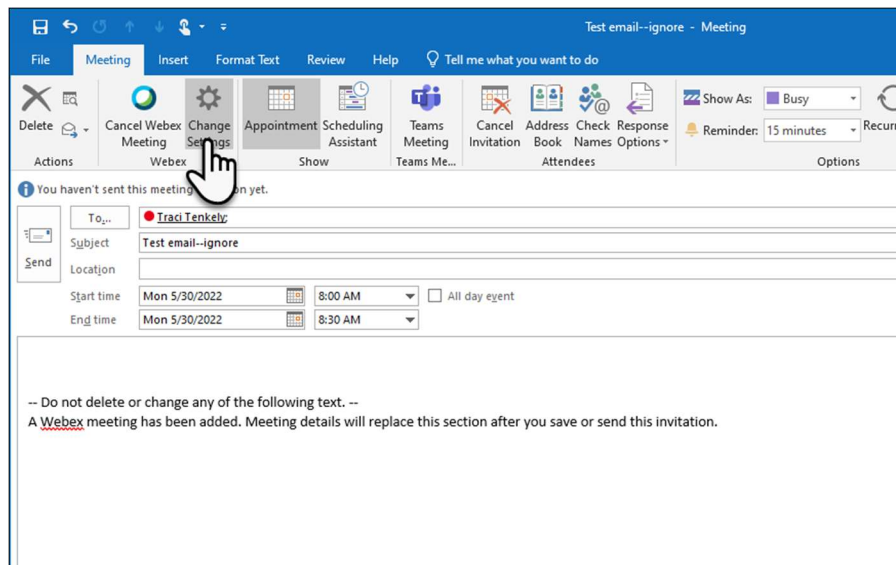
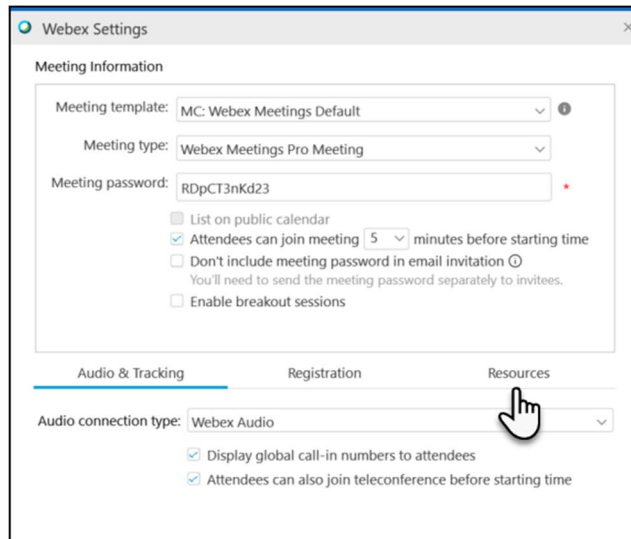


Figure 6

8. The Webex Setting window opens. Click **Resources**.



Webex Settings

Meeting Information

Meeting template: MC: Webex Meetings Default

Meeting type: Webex Meetings Pro Meeting

Meeting password: RDpCT3nKd23

List on public calendar

Attendees can join meeting 5 minutes before starting time

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

Enable breakout sessions

Audio & Tracking Registration **Resources**

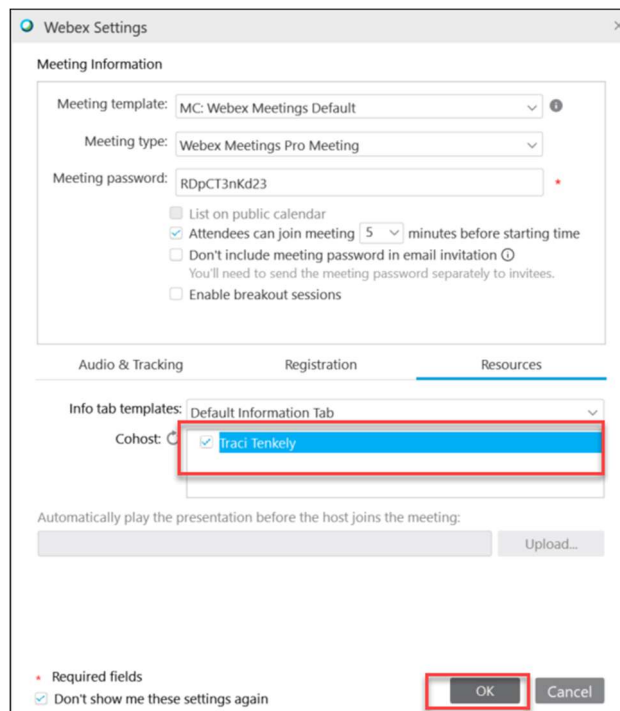
Audio connection type: Webex Audio

Display global call-in numbers to attendees

Attendees can also join teleconference before starting time

Figure 7

9. Select the **cohost(s)** from the list of attendees. Then, click **OK**.



Webex Settings

Meeting Information

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Don't include meeting password in email invitation ⓘ
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Enable breakout sessions

Audio & Tracking Registration **Resources**

Info tab templates: Default Information Tab

Cohost: Traci Tenkely

Automatically play the presentation before the host joins the meeting:

Upload...

Required fields

Don't show me these settings again

OK Cancel

Figure 8

10. Click **Send** to send out the meeting invitation.

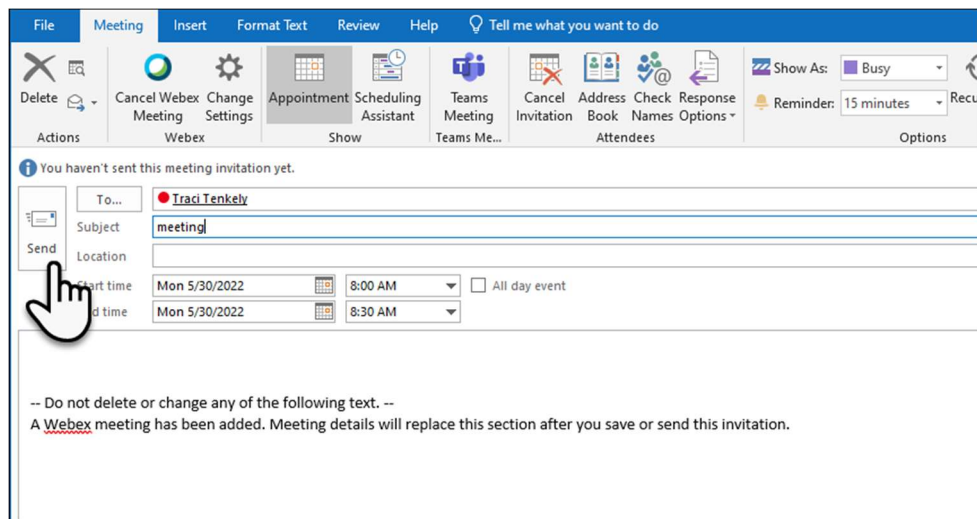


Figure 9

11. Once the invitation is sent, click on the calendar invite. The Webex meeting information populates the invitation.

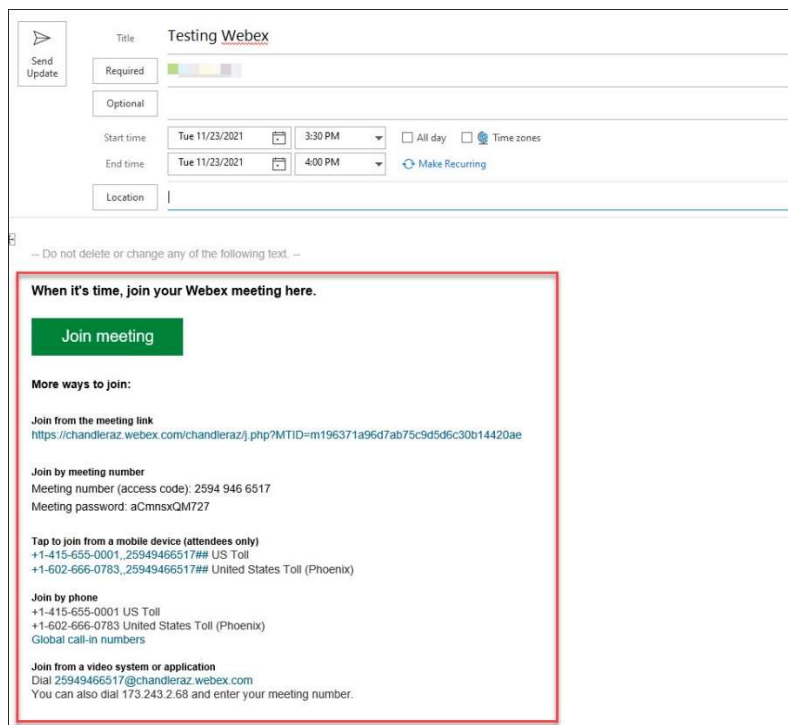


Figure 10

Schedule Personal Room Meeting Invite

A Personal Meeting Room invite contains a link that is unique to the sender, and the link can be used multiple times. The sender needs to attend the meeting, and meetings can be scheduled on the fly.

1. Log into your City of Chandler Outlook account.
2. To schedule a meeting from the Outlook ribbon, select **Schedule Personal Room Meeting** from the **Schedule Meeting** drop-down menu (Figure 11).

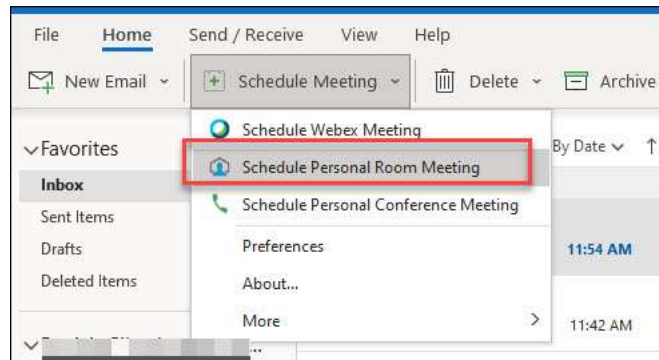


Figure 11

3. To schedule the meeting directly from the Outlook Calendar, click the **Calendar icon** on the lower-left menu. (See Figure 12).

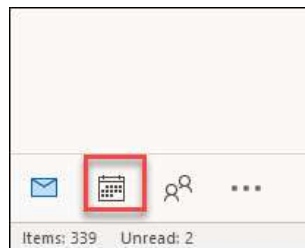


Figure 12

- The calendar opens. Right click the time slot for your meeting and select **New Meeting Request**.

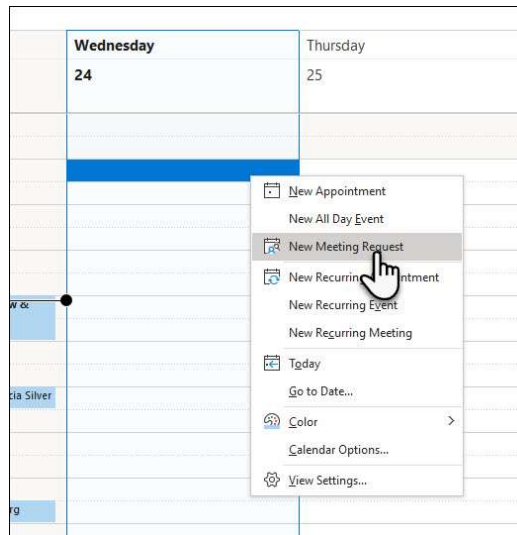


Figure 13

- The meeting invite opens. The Webex meeting info populates the invitation.

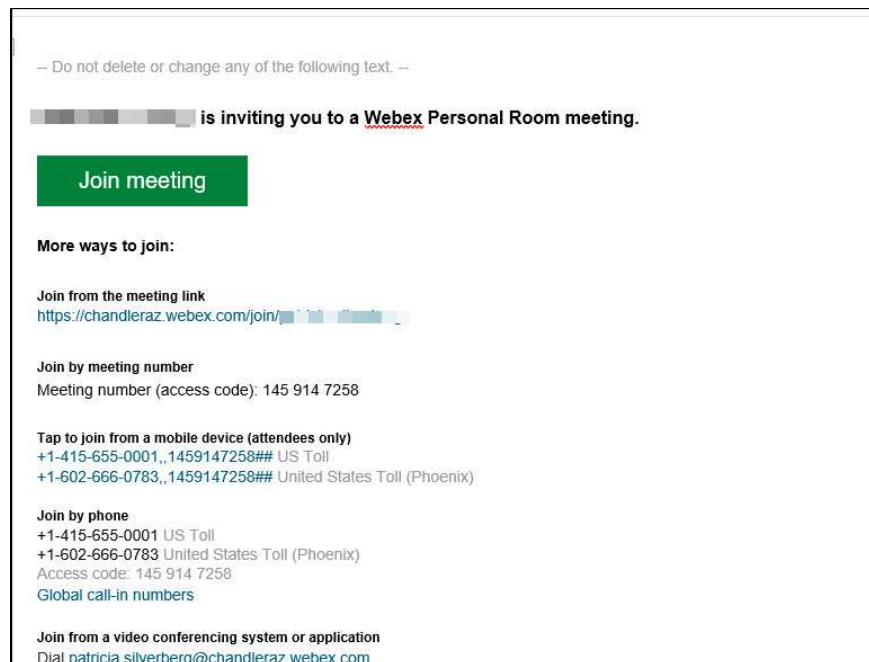
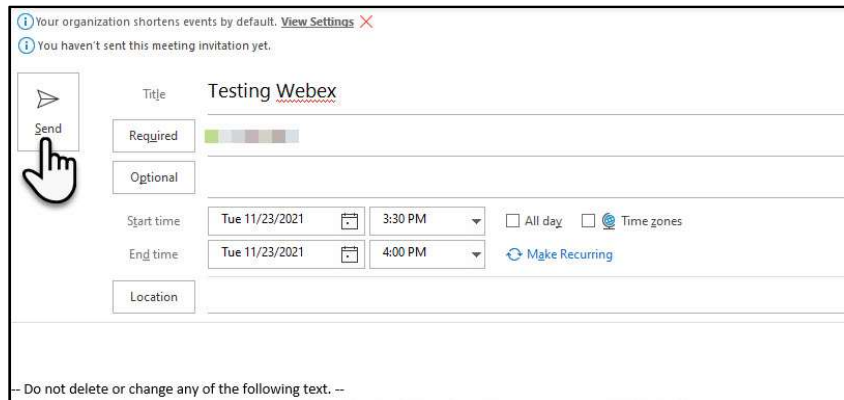


Figure 14

6. Select the required attendees and choose the time and date. Click **Send**.



The screenshot shows the Outlook meeting scheduling interface for a Webex meeting. At the top, there are two informational messages: "Your organization shortens events by default. [View Settings](#)" and "You haven't sent this meeting invitation yet." Below these, the meeting title is "Testing Webex". There are two buttons: "Required" (with a green bar) and "Optional". The start time is set to "Tue 11/23/2021" at "3:30 PM", and the end time is "Tue 11/23/2021" at "4:00 PM". There are checkboxes for "All day" and "Time zones", and a "Make Recurring" button. A "Location" field is empty. A "Send" button is highlighted with a hand cursor. At the bottom, there is a warning: "-- Do not delete or change any of the following text. --"

Figure 15