



# WebEx Integration to Lotus Notes

Users Guide

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# Getting Started

WebEx Integration to Lotus Notes is a productivity tool that enables you to quickly start, add, or join WebEx online meetings from Lotus Notes, 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 Productivity Tools are automatically installed on your computer when you log in to your WebEx service Web site, and are automatically updated when new versions are available. You can also install Productivity Tools manually.

Once WebEx Productivity Tools are installed, WebEx options for starting or adding meetings appear in Lotus Notes. Integration to Lotus Notes also provides the following from within Lotus Notes:

- quick access to My WebEx on your WebEx service Web site, which includes your personal list of meetings, user profile, and other account options
- a feature for starting a One-Click instant meeting (not available for all WebEx service sites)
- templates for meeting invitations

To provide security for your meetings, Integration to Lotus Notes uses 128-bit SSL (Secure Sockets Layer) encryption for all data it sends to and retrieves from your WebEx service Web site.

**Note:** Before you use WebEx Integration to Lotus Notes, ensure that

- You are familiar with Lotus Notes.
- You have a user account on your service Web site - that is, the site on which you host your online meetings.
- The WebEx Integration to Lotus Notes is available on your WebEx service Web site.

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# Installing and Setting Up WebEx Productivity Tools

You can install WebEx Productivity Tools to start or join meetings instantly using One-Click, Microsoft Office, Web browsers, Microsoft Outlook, IBM Lotus Notes, and instant messengers; or to schedule meetings using Microsoft Outlook or IBM Lotus Notes, without going to your WebEx service site.

After you install WebEx Productivity Tools, you can log in and set options for your WebEx account, set meeting options for instant meetings and scheduled meetings, set preferences for the One-Click panel, and select which Productivity Tools you will use with WebEx.

The following list describes features for installing and setting up options for WebEx Productivity Tools:

- Install WebEx Productivity Tools
- Open the WebEx Settings dialog box
- Set options for WebEx Productivity Tools
- Uninstall WebEx Productivity Tools

## Opening the WebEx Settings dialog box

To open the WebEx Settings dialog box from the Start menu:

Click **Start > Programs > WebEx > Productivity Tools > WebEx Settings**.

The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from the One-Click Panel:

- 1 If the One-Click Panel is not already open, do one of the following:

- Double-click the WebEx One-Click icon on your desktop.



- Go to **Start > Programs > WebEx > Productivity Tools > WebEx > One-Click**.

- 2 In the One-Click Panel, click **Edit WebEx Settings**.

The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from the One-Click taskbar icon:

- 1 Right-click the One-Click taskbar icon.
- 2 Choose **WebEx Settings** from the menu.

The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from Microsoft Outlook or IBM Lotus Notes:

In the WebEx menu, click **Account Settings**.

The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from Microsoft Office:

In Microsoft Word, Microsoft Excel, or Microsoft PowerPoint, click **WebEx Settings**.



The WebEx Settings dialog box appears.

To open the WebEx Settings dialog box from instant messengers:

Click **WebEx > WebEx Settings**.

The WebEx Settings dialog box appears.

## Installing WebEx Productivity Tools

If your site administrator has turned on WebEx Productivity Tools options for your WebEx service site, all WebEx Productivity Tools are installed automatically on your site. In addition, whenever newer versions are available, WebEx Productivity Tools are updated automatically.

The installation process installs all available WebEx Productivity Tools; however, at any time, you can change your preferences about which applications to use with WebEx Productivity Tools, and you can also change other WebEx account and meeting preferences by setting options in the WebEx Settings dialog box.

If necessary, you can also download and install WebEx Productivity Tools manually. Before installing WebEx Productivity Tools, ensure that your computer meets the following minimum system requirements:

- Microsoft Windows 2000, XP, 2003, Vista
- Microsoft Internet Explorer 6.0 SP1 or 7.0, or Firefox 3.0 or later
- Intel x86 (Pentium 400MHZ +) or compatible processor
- JavaScript and cookies enabled in the browser

**Note:** The WebEx integration for IBM Lotus Notes is included in the WebEx Productivity Tools installation or download only if your site administrator has turned on the Lotus Notes option for the site.

To install WebEx Productivity Tools from the Productivity Tools Setup page:

- 1 Log in to your WebEx service Web site.
- 2 Click **My WebEx > Productivity Tools Setup** (on the left navigation bar).

The Productivity Tools Setup page appears.

- 3 Under **On Your Desktop**, click **Download Productivity Tools**.

The File Download dialog box appears.

- 4 Save the installation program to your computer.

The name of the installation file has an **.msi** extension.

- 5 Run the installation file and follow the instructions.

Once you complete installation, log in using your WebEx account information and then verify your settings in the WebEx Settings dialog box.

To install WebEx Productivity Tools from the Downloads page:

- 1 Log in to your WebEx service Web site.
- 2 In the left navigation bar, under Support, click **Downloads**.
- 3 In the Downloads page, next to the WebEx Productivity Tools heading, click **Download Now**.

The File Download dialog box appears.

- 4 Save the installation program to your computer.

The name of the installation file has an **.msi** extension.

- 5 Run the installation file and follow the instructions.

Once you complete installation, you can log in with your WebEx account information and then verify your settings in the WebEx Settings dialog box.

**Note:** System administrators can also perform a mass installation for computers at their site.

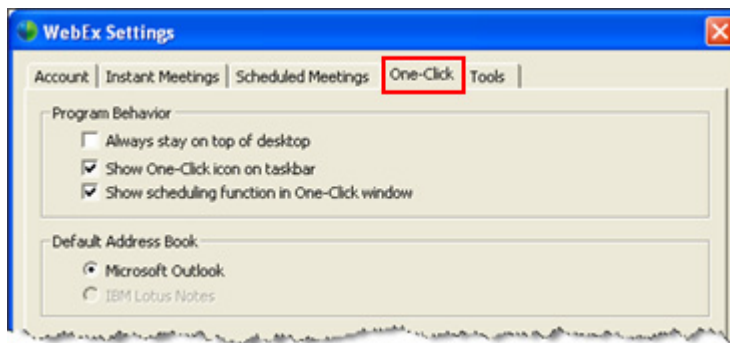
## Setting Up WebEx Productivity Tools

To set WebEx Productivity Tool options:

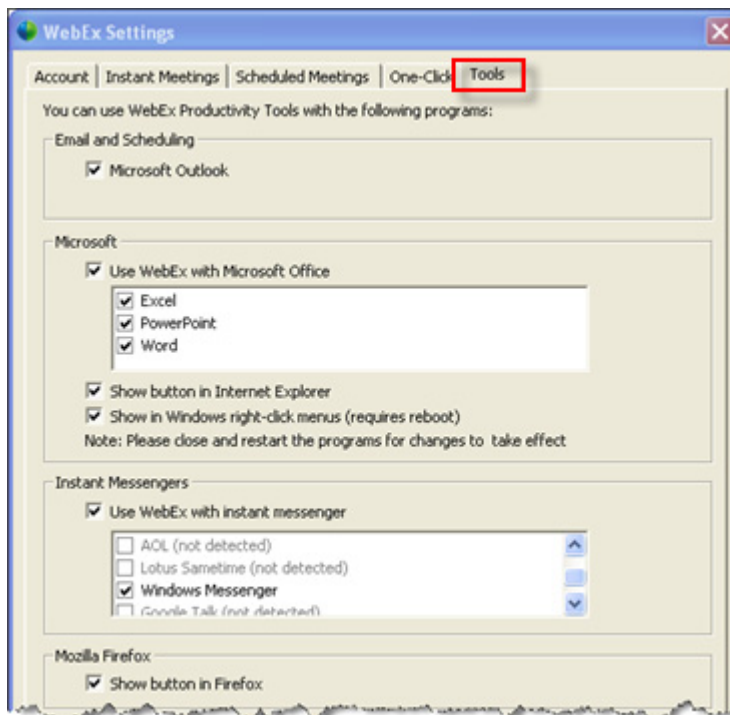
- 1 Open the WebEx Settings dialog box.



- 2 In the **Account** tab, log in to your account by specifying the URL for your WebEx service site and entering your username and password.
- 3 Click **Apply**.
- 4 Click the **Instant Meetings** tab.
- 5 Specify options for meetings started instantly from the One-Click panel, Microsoft Office, browsers, instant messengers, right-click menus, and from Microsoft Outlook or IBM Lotus Notes.
- 6 Click the **Scheduled Meetings** tab.
- 7 Specify options for meetings scheduled from Microsoft Outlook or IBM Lotus Notes.
- 8 Click the **One-Click** tab.



- 9 Specify options for the One-Click panel.
- 10 Click the **Tools** tab.



Select which applications to use WebEx integrations with.

## About the WebEx Settings dialog box

### How to access this dialog box

To access the [WebEx Settings dialog box from the Start menu](#):

Click **Start > Programs > WebEx > Productivity Tools > WebEx Settings**.

The WebEx Settings dialog box appears.

To access the [WebEx Settings dialog box from the One-Click Panel](#):

- 1 If the One-Click Panel is not already open, do one of the following:
  - Double-click the WebEx One-Click icon on your desktop.



- Go to **Start > Programs > WebEx > Productivity Tools > WebEx > One-Click**.
- 2 In the One-Click Panel, click **Edit WebEx Settings**.

The WebEx Settings dialog box appears.

To access the [WebEx Settings dialog box from the One-Click taskbar icon](#):

- 1 Right-click the One-Click taskbar icon.
- 2 Choose **WebEx Settings** from the menu.

The WebEx Settings dialog box appears.

To access the [WebEx Settings dialog box from Microsoft Outlook or IBM Lotus Notes](#):

In the WebEx menu, click **Account Settings**.

The WebEx Settings dialog box appears.

To access the [WebEx Settings dialog box from Microsoft Office](#):

In Microsoft Word, Microsoft Excel, or Microsoft PowerPoint, click **WebEx Settings**.



The WebEx Settings dialog box appears.

To access the WebEx Settings dialog box from Instant Messengers:

Click **WebEx >WebEx Settings**.

The WebEx Settings dialog box appears.

### Tabs in this dialog box

The WebEx Settings dialog box contains the following tabs:

- Account
- Instant Meeting
- Scheduled Meeting
- One-Click
- Tools

## About the Account tab

Account options allow you to log in to your WebEx service site with your user name and password.

Use this option...	To...
<b>Site URL</b>	Enter the URL to the WebEx service site from which the Productivity Tools were installed.
<b>User name</b>	Enter the user name for a host account on your WebEx service site.
<b>Password</b>	Enter the password for the host account on your WebEx service site.
<b>Remember my password</b>	Store the user name and password you entered so that you do not need to enter your user name and site URL next time you log in.
<b>Forgot your password</b>	Open the Login Assistance page on the WebEx service site, which sends you a reminder of your password.
<b>Change password</b>	Open a dialog box that allows you to specify a new password.
<b>Language</b>	Verify the language that is currently selected for your WebEx service site.

Use this option...	To...
<b>Locale</b>	Verify the country or locale that is currently selected for your WebEx service site.
<b>Time zone</b>	Verify the time zone that is currently selected for your WebEx service site.
<b>Change settings for WebEx service site</b>	Open the <b>My WebEx &gt; My Profile</b> page on your WebEx service site, and make changes to your profile.
<b>Refresh</b>	Refresh the WebEx Settings dialog box with the most recent settings from the WebEx service site.

## About the Instant Meetings tab

Instant meeting options affect meetings started instantly from the One-Click panel, Microsoft Office, browsers, instant messengers, right-click menus, and from Microsoft Outlook or IBM Lotus Notes.

Use this option...	To...
<b>Service type</b>	Select the type of WebEx session for which you want to start a meeting.  This option lists only the session types available for your site and user account.
<b>Meeting topic</b>	Enter the topic or name for the meeting.
<b>Meeting password</b>	Require participants to enter the password you set to join your meeting.  Your site may require that all passwords comply with security criteria, such as a minimum length and a minimum number of letters, numbers or special characters.
<b>List this meeting on the WebEx site</b>	Include this meeting on the meeting calendars on the WebEx service site.  Available for meetings, sales meetings, and training sessions only.
<b>List Support Session on Personal Meeting Room</b>	Includes this support session in your meetings list on your Personal Meeting Room on the WebEx service site.  Available for support sessions only.
<b>Ask for my approval when someone joins</b>	Specify that the Request to Join dialog box appears on your screen when someone tries to join your meeting.  Available for support sessions only.

**Use this option...**

**To...**

**Conference type**

Select the type of teleconference you would like to use:

- **None**
- **Reservationless-Plus<sup>®</sup>**
- **Other teleconference**

Use this option...	To...
<b>Tracking code</b>	<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 select a code from a predefined list, select a code from the appropriate drop-down list.</p>
<b>CUVC Meeting ID</b>	<p>(CUVC Integration to Meeting Center only) Enter a custom URL to create a virtual meeting room in which you can use Cisco Unified Video (CUVC) in your meeting.</p> <p>If you leave this box empty, the WebEx Meeting ID is used by default.</p> <p>When you start your WebEx meeting, the CUVC Video panel displays automatically.</p>

## About the Scheduled Meetings tab

Scheduled meeting options affect meetings scheduled from Microsoft Office or IBM Lotus Notes.

Use this option...	To...
<b>Service type</b>	<p>Select the type of WebEx meeting you would like to schedule.</p> <p>The list includes the meeting types that are available for your service website.</p> <p>The <b>Other Teleconference</b> option allows you to schedule your meeting with another teleconference service.</p>
<b>Meeting topic</b>	<p>Enter the topic or name for the meeting.</p>
<b>Meeting password</b>	<p>Require participants to enter the password you set to join your meeting.</p> <p>Your site may require that all passwords comply with security criteria, such as a minimum length and a minimum number of letters, numbers or special characters.</p>
<b>Exclude password from email invitation</b>	<p>Exclude the meeting password from the email message that is sent to everyone who is invited to your meeting.</p>
<b>List this meeting on the WebEx site</b>	<p>Include this meeting in the meeting calendars on the WebEx service site.</p> <p>Available for meetings, sales meetings, events, and training sessions only.</p>
<b>Attendees can join the</b>	<p>Allow attendees to join the meeting within a set number of minutes</p>

Use this option...	To...
<b>meeting [x] minutes before starting time</b>	before the meeting's starting time. <b>Note</b> If you clear this check box or set this option to 0 minutes, you must start the meeting before attendees can join it.
<b>CUVC Meeting ID</b>	(CUVC Integration to Meeting Center only) Enter a custom URL to create a virtual meeting room in which you can use Cisco Unified Video (CUVC) in your meeting.  If you leave this box empty, the WebEx Meeting ID is used by default.  When you start your WebEx meeting, the CUVC Video panel displays automatically.

## Audio & Tracking tab

Options that affect audio conferences and tracking.

Use this option...	To...
<b>Conference type</b>	Select the type of teleconference you would like to use: <ul style="list-style-type: none"> <li>▪ <b>None</b></li> <li>▪ <b>Reservationless-Plus</b></li> <li>▪ <b>Other teleconference</b></li> </ul>
<b>Tracking code</b>	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.  If your site administrator requires you to select a code from a predefined list, select a code from the appropriate drop-down list.

## Registration tab

Options that affect how attendee registrations are approved.

Use this option...	To...
<b>Require attendee registration</b>	Specify that all attendees must register to attend the meeting so you can accept or deny entry into your meeting. An attendee cannot attend the meeting until you accept his or her registration request.  This option is available only if the <b>Attendees can join the meeting [x] minutes before starting time</b> option is cleared.
<b>Automatically accept all registration</b>	Accept all registration requests automatically. If this option is not selected, you must accept registration requests manually by using the

Use this option...	To...
	options on the Registered Attendees page on the WebEx service site. This option is available only if the <b>Attendees can join the meeting [x] minutes before starting time</b> option is cleared and the <b>Require attendee registration</b> option is selected.

## Resources tab

Options that control how resources are used in meetings.

Use this option...	To...
<b>Info tab templates</b>	Choose a template for the <b>Info</b> tab, which appears in the content viewer during the meeting. The <b>Info</b> tab contains information about the meeting, including the meeting host, teleconference phone numbers, and host key (for the host only). <b>Note:</b> You can choose another template only if one or more customized <b>Info</b> tab templates are available for your meeting service. Your site administrator can add templates for your service.
<b>Automatically play the presentation before the host joins</b>	Automatically play a presentation that attendees can view before the host actually joins the meeting.

## About the One-Click tab

One-Click options affect the features of the One-Click panel.

Use this option...	To...
<b>Always stay on top of desktop</b>	Have the WebEx One-Click panel appear on top of every application or program that is open on your computer.
<b>Show One-Click icon on taskbar</b>	Show the One-Click icon in the taskbar.
<b>Show scheduling function in One-Click window</b>	Show the links <b>Start Scheduled Meeting</b> and <b>Schedule Meeting</b> on the panel. Clicking either of the links takes you to the appropriate pages on your WebEx service site.
<b>Microsoft Outlook or IBM Lotus Notes</b>	Select an email and scheduling program for a default address book. WebEx One-Click integrates with the email program you select, making it easy for you to obtain your contacts' email addresses. Clicking on the WebEx One-Click panel opens an address book from the email program you select here.

## About the Tools tab

Tools options determine which programs include WebEx integrations and shortcuts.

Use this option...	To...
<b>Microsoft Outlook</b>	Show WebEx buttons and commands for scheduling meetings or starting One-Click meetings with Microsoft Outlook using the contacts and calendar from Microsoft Outlook.
<b>IBM Lotus Notes</b>	Show WebEx buttons and commands for scheduling meetings or starting One-Click meetings with IBM Lotus Notes using the contacts and calendar from Outlook.
<b>Use WebEx with Microsoft Office</b>	Show WebEx buttons for starting a One-Click meeting and automatically sharing a selected file or document from the following Microsoft Office applications: <ul style="list-style-type: none"> <li>▪ Excel</li> <li>▪ PowerPoint</li> <li>▪ Word</li> </ul>
<b>Show button in Internet Explorer</b>	Show a WebEx button that allows you to start One-Click meetings from the Microsoft Internet Explorer toolbar.
<b>Show in Windows right-click menus (requires reboot)</b>	Show a WebEx command that allows you to start a One-Click meeting and automatically share a selected file or document from the right-click shortcut windows available in Windows Explorer.
<b>Use WebEx with instant messenger</b>	Shows WebEx buttons and commands that allow you to start a One-Click meeting from an instant messenger. You can select one or more of the following instant messengers: <ul style="list-style-type: none"> <li>▪ AOL</li> <li>▪ Google Talk</li> <li>▪ Lotus Sametime</li> <li>▪ Skype</li> <li>▪ Windows Messenger</li> <li>▪ Yahoo Messenger</li> </ul>
<b>Show button in Firefox</b>	Shows a WebEx button that allows you to start instant meetings from the Firefox toolbar.

## Uninstalling WebEx Productivity Tools

You can uninstall WebEx Productivity Tools at any time.

To uninstall WebEx Productivity Tools by using Start menu commands:

- 1 Click **Start > Programs > WebEx > Productivity Tools > Uninstall**
- 2 Click **Yes** to confirm that you want to uninstall WebEx Productivity Tools.

To uninstall WebEx Productivity Tools by using the Control Panel:

- 1 Click **Start > Settings > Control Panel**.
- 2 Double-click **Add/Remove Programs**.
- 3 Click **WebEx Productivity Tools**.
- 4 Click **Remove**.
- 5 Click **Yes** to confirm that you want to uninstall WebEx Productivity Tools.

**Note:** Uninstalling Productivity Tools removes all Productivity Tools and shortcuts from your computer. If you want to keep using some Productivity Tools but disable others, edit the options in the WebEx Settings dialog box.

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# Scheduling a Meeting

## About scheduling a meeting

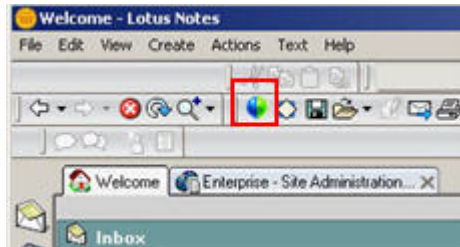
Before scheduling an online meeting using Integration to Lotus Notes, note the following:

- Integration to Lotus Notes provides the basic options for scheduling a meeting. Thus, some options that appear on your service Web site are not available in Integration to Lotus Notes. For these additional options, Integration to Lotus Notes uses settings for the template that you select for the meeting.
- Integration to Lotus Notes does not support all the "repeats" (recurrence) options that are available in Lotus Notes.
- In any meeting invitations that you send in Lotus Notes, the meeting's starting time appears in the time zone that is set on your computer, *not* in your site preferences for your service.
- On your 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. For details about setting your site preferences, refer to the documentation for your service Web site.

## Setting up a meeting and inviting attendees

## Setting up a meeting

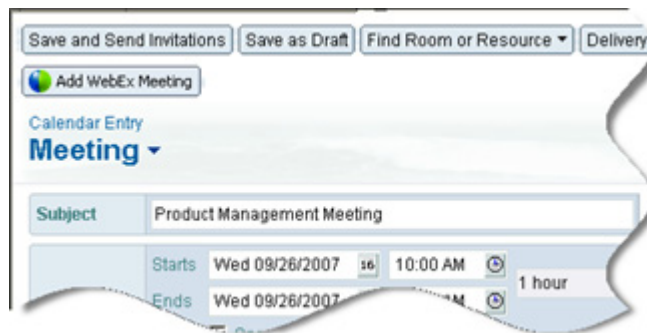
The WebEx Productivity Tools allow you to schedule meetings within Lotus Notes without going to your WebEx service Web site. To set up an online meeting using WebEx Integration to Lotus Notes, open a new meeting request and then specify information and settings for the meeting.



To schedule a WebEx meeting with Lotus Notes

- 1 In your Lotus Notes Calendar, click **Schedule a Meeting** and add the details of the meeting.

The **New Calendar Entry** tab appears with an **Add WebEx Meeting** button.



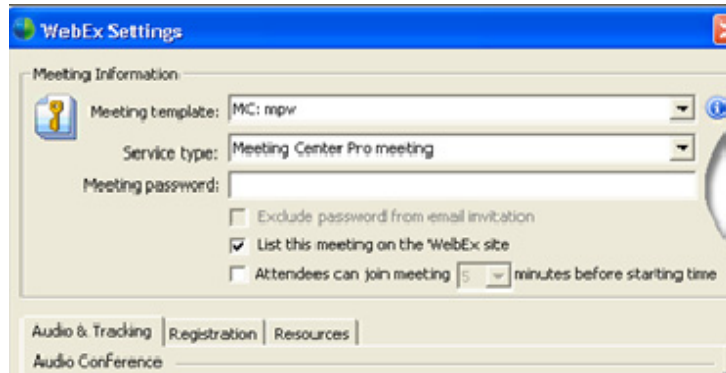
Specify general meeting information, such as

- subject
- time
- location
- invitees
- meeting recurrence More...

- 2 After you specify general meeting options, click **Add WebEx Meeting**.

The WebEx Settings dialog appears.

Specify WebEx meeting options, such as password, audio, and registration



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.

- 3 Specify WebEx meeting settings, and click **OK**.

For details, see [Opening the WebEx Settings dialog box](#)

- 4 Do one of the following, as appropriate:
  - Click **Save and Send Invitations** to send the invitations to attendees.
  - Click **Save as Draft**, and invite attendees to the scheduled meeting at a later time.

Integration to Lotus Notes contacts your WebEx service Web site, and then adds the scheduled meeting to:

- your Lotus Notes 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

**Note:** You can change any settings for your meeting after you schedule it.

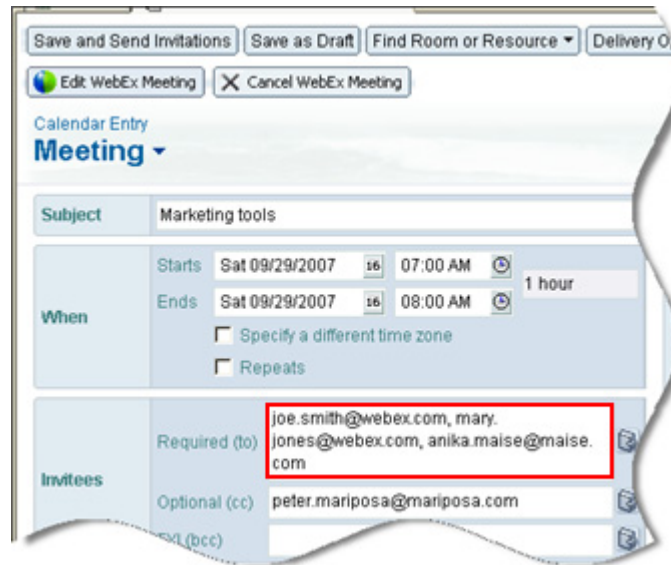
## Inviting attendees

When using Integration to Lotus Notes to schedule a meeting, you can invite attendees by selecting them in any of your Lotus Notes address books. You can also invite attendees who are not in an Lotus Notes contacts list by providing their email addresses.

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

To send a meeting invitation

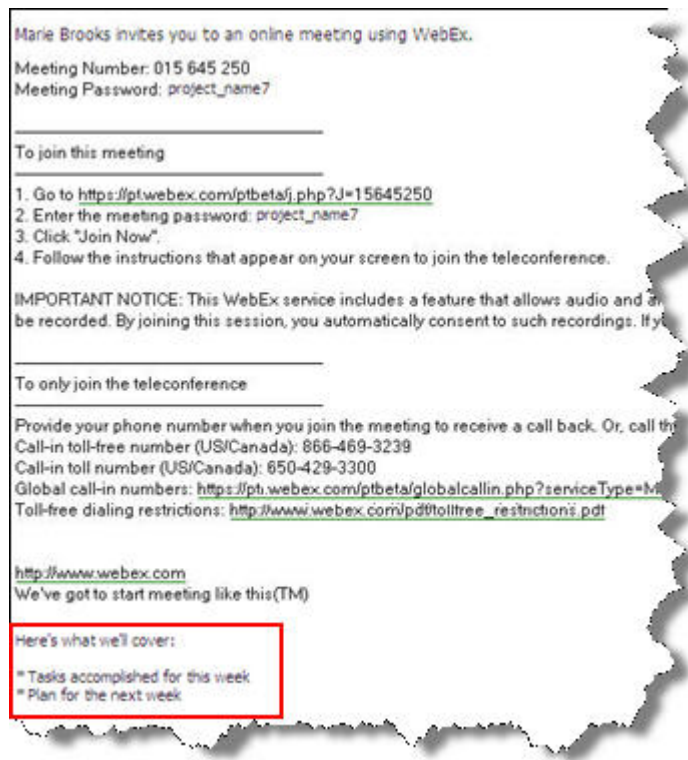
- 1 If you have scheduled a meeting using WebEx Integration to Lotus Notes, open the calendar entry in your Lotus Notes calendar.
- 2 Click an address book icon to select invitee names, or enter the names manually.



In the Invitees panel, select or enter the names of the invitees.

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

The following is an example of an invitation email message:



Any information that you added to the invitation appears here.

For additional information about inviting attendees in Lotus Notes, refer to Lotus Notes Help.

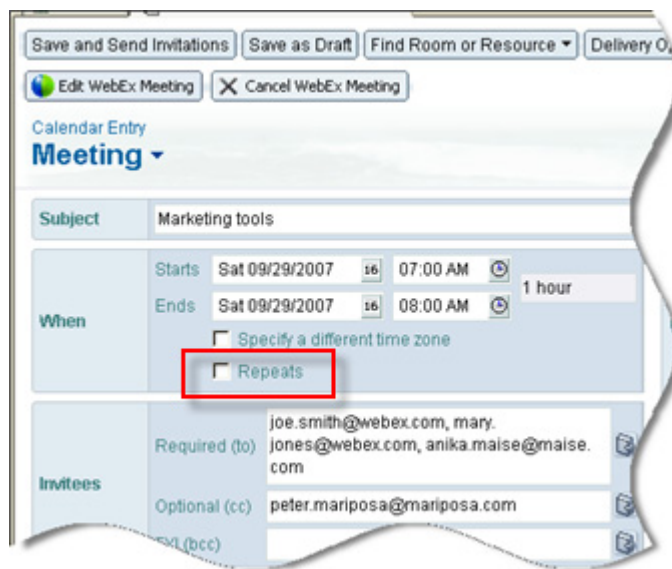
## Specifying a recurrence pattern for a meeting

Using Lotus Notes repeat options, you can specify a recurrence pattern for your meeting. For example, you can specify that a meeting recurs every Wednesday at 2:00 p.m. until a specific date. Integration to Lotus Notes schedules the meeting on each day that you specify in the recurrence pattern.

However, depending on your service, the use of repeat options in Lotus Notes may not all be supported.

To specify a recurrence pattern for an online meeting:

- 1 If you have scheduled a meeting using WebEx Integration to Lotus Notes, open the calendar entry in your Lotus Notes calendar.



The Repeat Options dialog box appears.

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

### **Recurrence pattern support in WebEx Integration to Lotus Notes**

The following table shows how Lotus Notes recurrence patterns are handled in WebEx for WebEx meetings:

## WebEx Meetings

Type	Lotus Notes Option	Converted to WebEx Meeting Option
Daily	Every 1-31th day	Every 1-31th day
Weekly	Every 1-8th weeks on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday]	<p><i>For Meeting Center and Sales Center meetings:</i></p> <p>Every 1-8th weeks on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday]</p> <p><i>For Event Center events and Training Center training sessions:</i></p> <p>Every week on: [Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday]</p> <p>If you schedule a meeting that repeats every X week, where X is greater than 1, in Lotus Notes, the meeting will be scheduled in Lotus Notes as you specified, but will appear as a weekly meeting on your WebEx service site.</p>
Monthly	Every 1st-12th month on the 1st -31st day	Every 1st-12th month on the 1st -31st day
	count from the end of the month	Not supported
	Every 1st-12th month on the [1st, 2nd, 3th, 4th, last][Sun, Mon, Tue, Wed, Thu, Fri, Sat]	Every 1st-12th month on the [1st, 2nd, 3th, 4th, last][Sun, Mon, Tue, Wed, Thu, Fri, Sat]
Yearly	Every 1- 10th year	<p>Every year</p> <p>If you schedule a meeting that repeats every X year, where X is greater than 1, in Lotus Notes, the meeting will be scheduled in Lotus Notes as you specified but will appear as a yearly meeting on your WebEx service site.</p>
Custom	custom settings	Not supported.
End date	Start from date to date	If the time period is longer than one year, it is converted to one year.
	Start from date continue for X times	If the time period is longer than one year, it is converted to one year.

Type	Lotus Notes Option	Converted to WebEx Meeting Option
Specify Exceptions	Don't move	Not supported.
	Move to Friday	Not supported.
	Move to Monday	Not supported.
	Move to nearest weekday	Not supported.
	Delete	Not supported.

**Note:** For modification or deletion of a repeating meeting in Lotus Notes, pay attention to the following:

- When you edit a repeating meeting, such as to reschedule its date or change its meeting options, the changes you make to a *single* instance of the meeting must be applied to *all* its instances for the changes to take effect on your service Web site. If you only apply the changes to the single instance, an update is made in Lotus Notes, but *not* to the calendar on your site.
- If you cancel a *single* instance of a repeating meeting, the instance is deleted in Lotus Notes, but remains on your calendar. You need to delete *all* instances of a repeating meeting in Lotus Notes so that it can be removed from the calendar.

## Using meeting templates

A meeting template stores all of your preferred settings, so you can quickly schedule or start an online meeting by choosing the template instead of selecting the same settings for each meeting that you schedule. A template, however, does not store the settings of a topic, password, and date and time.

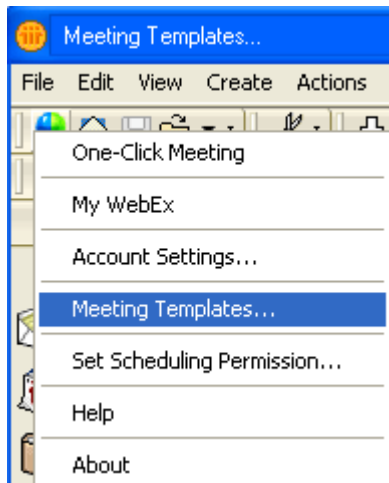
When scheduling a meeting using Integration to Lotus Notes, you can select any of the meeting templates that you saved on your service Web site.

**Note:**

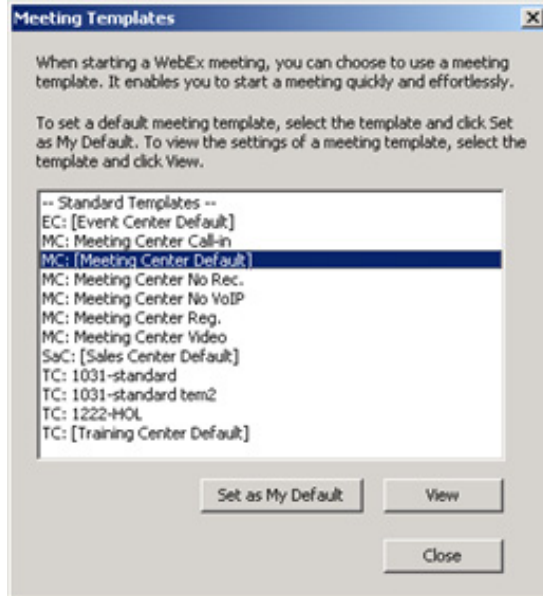
- Although Integration to Lotus Notes provides only a subset of all the options that you can use for an online meeting, all the options are preset in a template, regardless of whether they appear in Integration to Lotus Notes. For example, if you set specific attendee privileges in a template, those privileges are set for the meeting, even though attendee privilege settings are not available in Integration to Lotus Notes.
- Once you schedule a meeting, you cannot change its template.

To view the details of a template:

- 1 Click the Configuration button on the Lotus Notes toolbar, and then choose **Meeting Templates**.



Your list of saved meeting templates on your service Web site appears. The following is an example of a user's list of templates:



- 2 Select a template, and then click **View**.

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# Scheduling for Another Host

You can schedule a WebEx meeting on behalf of another host if the host gives you the necessary permissions.

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. You can schedule, edit, and cancel meetings for that host.

## Setting up before scheduling for another host

Before you can schedule a WebEx meeting for another host, ensure that both you and the host:

- have a WebEx host account. To obtain a WebEx host account, contact your site administrator.
- have the same version of WebEx Integration to Lotus Notes installed on your computers.

The actual host does the following:

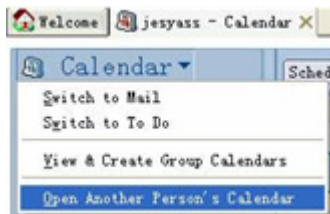
- gives you permission to schedule WebEx meetings. The host does this on the WebEx service Web site.
- gives you permission to use his or her Lotus Notes calendar. The host does this by selecting you as a delegate in Lotus Notes.

## Scheduling a meeting for another host

If the host has given you the necessary permissions, you can schedule a meeting on behalf of that host.

To schedule a meeting in Lotus Notes for another host:

- 1 On the **Calendar** menu, choose **Open Another Person's Calendar**.



The Open Calendar dialog box appears.

- 2 Select **Other**, and then select the host's name.

The host's calendar appears as a tab on your calendar.

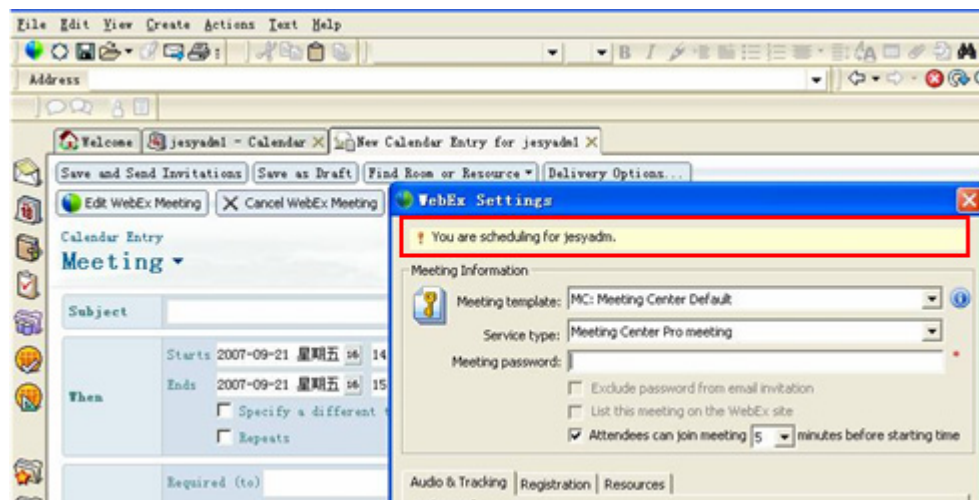
**Tip:** The next time you schedule a meeting for this host, as long as your permissions remain valid, you can select the host's name directly from the Calendar menu.

- 3 Select a date and time on the host's calendar.

The Calendar Entry dialog appears.

- 4 Click **Add WebEx Meeting** on the top left of the Calendar Entry dialog.

The WebEx Settings dialog appears.



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

**5** Schedule the meeting.

You can also edit or cancel the meeting you scheduled.

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# Managing a Meeting

## About managing a meeting

After you schedule a meeting using Integration to Lotus Notes, you can manage the meeting, including to:

- modify the meeting—the changes you make to the meeting in Lotus Notes are automatically updated on your service site.
- start the meeting as you are the meeting host
- cancel the meeting in Lotus Notes, which is also deleted from your service site
- Join the meeting for meeting attendees

## Editing a scheduled meeting

Once you schedule a meeting using Integration to Lotus Notes, you can use Lotus Notes to edit it at any time. For example, you can change its starting time, specify a new password, choose a different teleconferencing option, and so on. After you edit a scheduled meeting, Integration to Lotus Notes sends an updated meeting invitation to any attendees whom you invited to the meeting and updates the meeting information on your service Web site.

**Important:**

- If you edit a meeting using your service Web site instead of Integration to Lotus Notes, your changes do *not* appear in Lotus Notes. For example, if you change the meeting's starting time using your site, the starting time does not change on your Lotus Notes calendar. Thus, recommends that you use only Lotus Notes to edit a meeting.
- When you use Lotus Notes to edit a repeating meeting, the changes you make to a *single* instance of the meeting must be applied to *all* its instances for the changes to take effect on

your service Web site. If you only apply the changes to the single instance, an update is made in Lotus Notes, but *not* to the calendar.

To edit a scheduled meeting:

- 1 On your Lotus Notes calendar, open the calendar entry for your scheduled meeting.
- 2 Edit the information and change options on the Calendar Entry > Meeting screen, as required.
- 3 Click **Edit WebEx Meeting** to edit information or change options in the Meeting Settings dialog box.
- 4 Click **Save and Send Invitations**.

Integration to Lotus Notes contacts your service Web site and updates the meeting on the site. A message appears, confirming that your meeting was updated.


**Note:** You cannot change the template for a scheduled meeting.

## Starting a meeting

*For meeting hosts*

Once you schedule a meeting using Integration to Lotus Notes, you can start the meeting in *either* of the following ways:

- On your Lotus Notes calendar, open the meeting item, and then click the **Start** button, or copy and paste the link to start the meeting in your Web browser.

Description  [Click to append attachment\(s\)](#)

Hello, Brook Qin

You have successfully scheduled the following meeting:

Topic: Weekly Team Meeting  
 Date: 03/17/2006  
 Time: 03:00 PM, ZET8 GMT+08:00  
 Meeting number: 018 414 246  
 Meeting password: gowebex!  
 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.

Please click the button below to start or edit your meeting or copy and paste the link next to the button into a browser window

<https://mojo.webex.com/mojo/j.php?S=18414246>

For help or support  
 Go to <https://mojo.webex.com/mojo>, click Assistance, and then click Help or click Support.

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

Here is what we'll cover:

- \* Tasks accomplished this week
- \* Plan for the next week{

Click Start or copy and paste the link into your Web browser to start the meeting.

**Note:** The link that appears in your calendar entry is for meeting hosts only. The link that appears in attendees' invitations is a different link, which attendees can click to join the meeting.

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

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

## Canceling a meeting

To cancel an online meeting that you scheduled in Lotus Notes, simply use the cancellation options available in Lotus Notes. All attendees whom you invited to the meeting automatically receive a cancellation notice.

Integration to Lotus Notes also contacts your service Web site and cancels, or removes, the meeting from your site. A message appears, confirming that your meeting was removed from your service Web site. You also receive a cancellation notice in an email message.

**Important:**

- If you cancel a meeting using your service Web site instead of Integration to Lotus Notes, your site does not automatically cancel the meeting on your Lotus Notes calendar. Thus, it is recommended that you cancel meetings using Lotus Notes instead of your service Web site.
- If you cancel a *single* instance of a repeating meeting, the instance is deleted in Lotus Notes, but remains on your calendar. You need to delete *all* instances of a repeating meeting in Lotus Notes so that it can be removed from your calendar.

For more information about canceling a meeting in Lotus Notes, refer to Lotus Notes Help.

## Joining a meeting

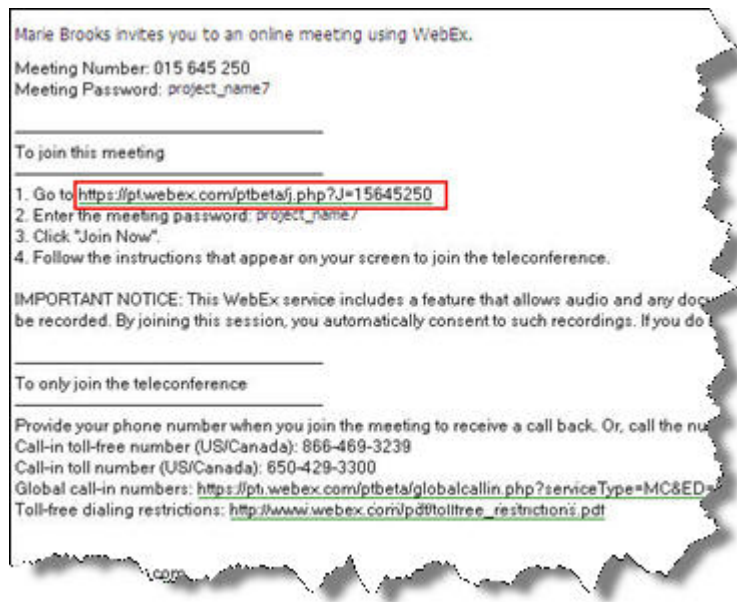
*For meeting attendees*

If a meeting host uses Integration to Lotus Notes to invite you to a meeting, you receive an invitation email message that includes a link that you can click to join the meeting. Alternatively, you can join a meeting directly from your service Web site.

### Joining a meeting using an email invitation

To join the meeting, first open the meeting invitation in your email inbox. If you are using Lotus Notes you can also open the calendar entry for the meeting. Then click the link to join the meeting.

The following figure shows an example of a meeting invitation in Lotus Notes.



Click the link to join the meeting.

If you use another email program that supports the iCalendar format, such as Lotus Notes, your invitation may include an **.ics** file. You can click this file to add the meeting to your calendar.

## Joining a meeting from the service site

Instead of using an email program to join a meeting, you can go to your service Web site. If the meeting is listed, locate the entry for the meeting on the site, using either the meeting calendar or other list of sessions. Or, if the meeting is unlisted, enter the meeting number on the site. You can obtain the meeting number from you invitation email message or directly from the meeting host.

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