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SMARTVOICE WITH CISCO WEBEX

OUTLOOK INTEGRATION GUIDE

Last updated: November 2021

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SMARTVOICE WITH CISCO WEBEX SELF-SERVE OUTLOOK INTEGRATION GUIDE

This user guide will show you how to connect Cisco Webex to Microsoft Outlook on desktop, schedule space and personal room meetings, and walk you through a self-serve option to synchronize your directory.

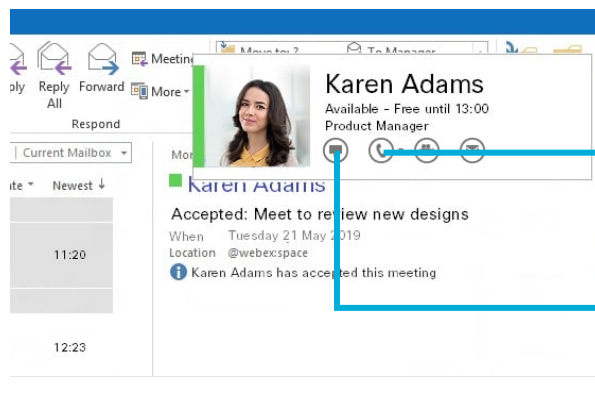## CALLING, MESSAGING AND MEETINGS.

In this first section, we'll provide end users with the necessary links to help you connect your Outlook account, schedule meetings, and how to use the Cisco Webex Scheduler.

CONNECT WEBEX TO MICROSOFT OUTLOOK ON DESKTOP

1. Connect Your Microsoft Outlook Account

You can connect your Microsoft Outlook account to your Webex app to make it easier for you to collaborate with your colleagues. Once you've connected Webex to your Outlook account, you will be able to see online statuses, and search, call or send chat messages to your Outlook contacts in Webex.

Before you can begin, your administrator needs to enable the Microsoft Outlook integration for you. Visit Webex App | Connect Your Microsoft Outlook Account to connect Outlook to Webex. If you're an IT administrator for your organization, visit Administration – Webex App | Installation and Automatic Upgrade to enable Outlook for your organization.

SEARCHING LOCAL CONTACT IN WEBEX
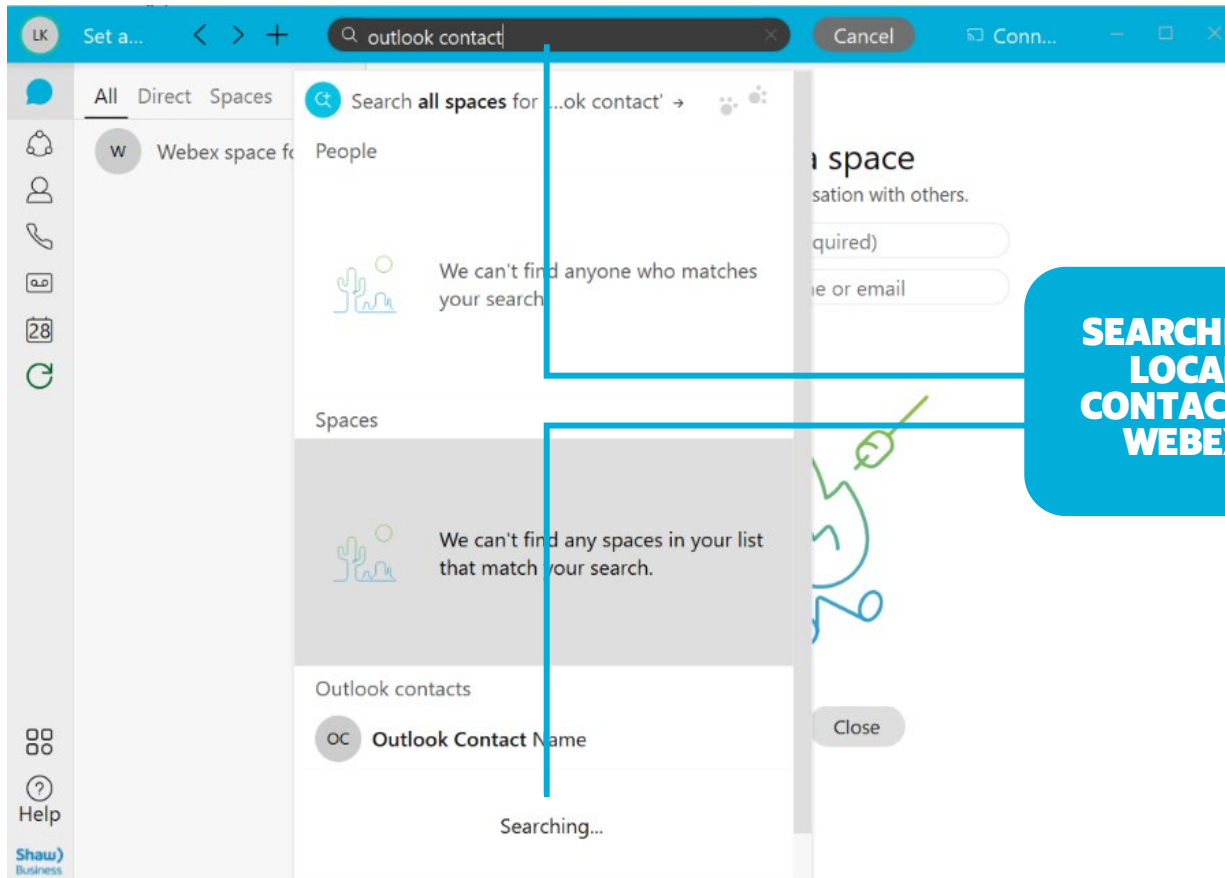
NOTE: If you're using a Mac operating system, make sure to check out Webex Teams Outlook Integration on Mac to troubleshoot any issues you may encounter while integrating Outlook.

2. **Set Webex As Your Default Calling App**

Once you've connected Webex to Outlook, you can set it as your default calling app. This will allow you to use Webex for any calls you make in Microsoft Outlook or whenever you click on a phone number on websites or in other apps.
Learn how to set Webex as your default calling app on Windows and Mac devices by visiting Webex | Choose as Calling App.

3. Enable User Status

As an admin, you can enable your users' status to display in Microsoft Outlook. However, you must only maintain one app that integrates with Outlook for status. Having more than one app integrated with Outlook can cause conflicts. Before enabling Webex App status integration with Outlook, users must quit and unregister any other instant messaging apps that they use to connect with Outlook.

Visit Enable Webex App Users' Status to Display in Microsoft Outlook to learn how to connect your user's Webex App status. If your Microsoft Active Directory isn't synchronized, you will encounter user status issues including the user status missing from 'To' and 'CC' email composing fields. We'll walk through how to integrate your Azure Directory later in this document.
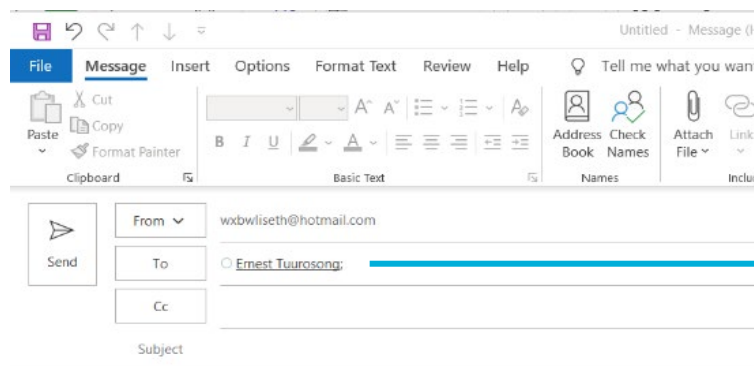
## SCHEDULE SPACE MEETINGS CROSS-LAUNCHING OUTLOOK CALENDAR

Choose the default meeting scheduler to let the Webex app know where you'd like to schedule your meetings by visiting **Webex | Choose The Meeting Scheduler**.

1. Schedule Space Meetings

Once you have your default scheduler selected, you can go ahead and Schedule a meeting from a space.
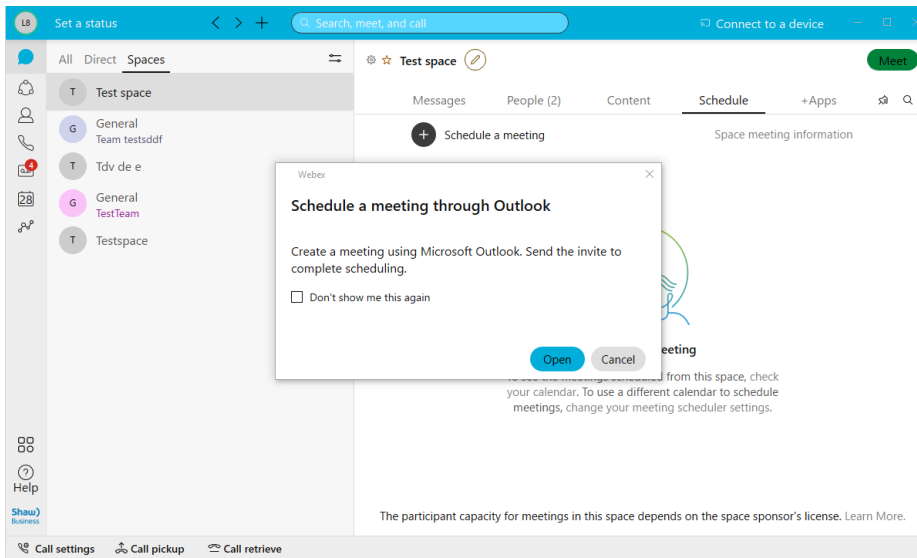
Then you can complete and send the meeting invite in Outlook.
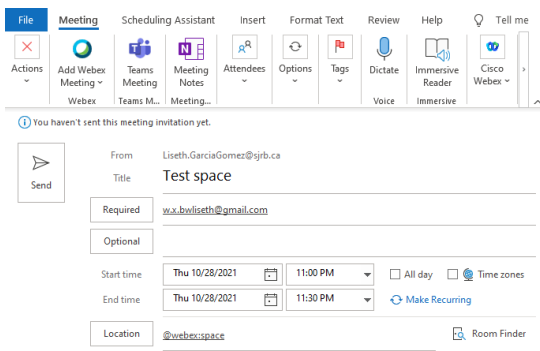
2. Schedule Personal Room Meetings

You can also schedule a Personal Room meetings if the Outlook schedule meeting option is selected. To schedule Personal Room meetings, your seat will need the SmartVoice Meeting Add-On.

Then you can complete and send the meeting invite in Outlook.

3. Cisco Webex Scheduler

If you have a standard license, you can add the Cisco Webex Scheduler to your Outlook. **Visit Webex | Explore The Cisco Webex Scheduler for Microsoft Outlook** to learn more about this helper, for both Microsoft 365 users and administrators.

MICROSOFT 365 USER OR ADMIN ADD-IN INSTALLATION

WEBEX PREFERENCES: MEETING OR PERSONAL MEETING ROOM
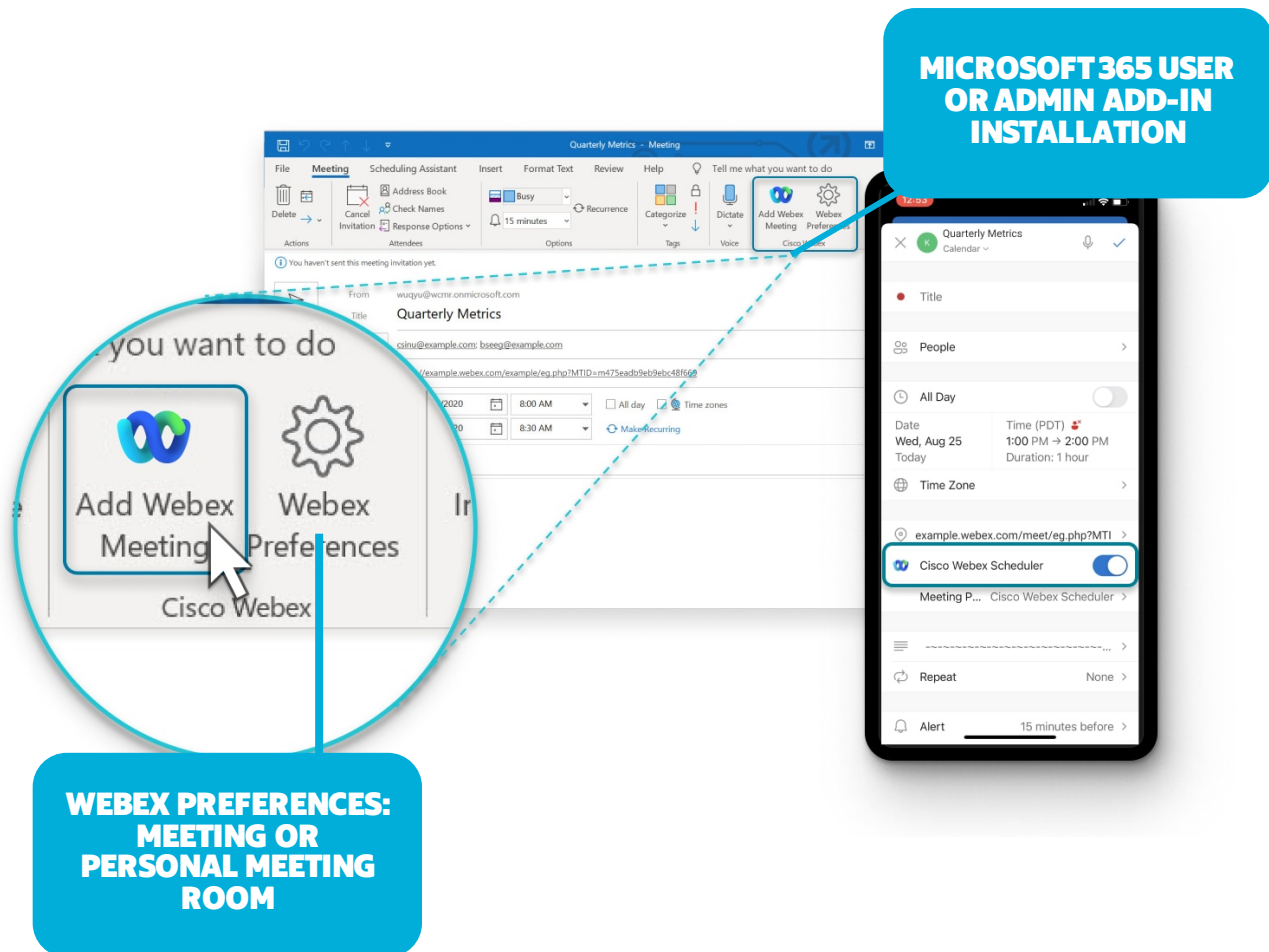
4. Scheduler and Join Meetings With Cisco Webex Scheduler

The Webex Scheduler lets Microsoft 365 users schedule Webex meetings or Webex Personal Room meetings directly from Microsoft Outlook, in any browser. The calendar invite shows the Webex meeting details, including a link to join the meeting. Learn how to add the Webex Scheduler Add-In, schedule a Microsoft 365 meeting from Outlook, change the default meeting type and more by visiting **Webex | Schedule and join meetings with Webex Scheduler for Microsoft Outlook.**

### 5. Replace Cisco Webex Productivity Tools

It is recommended that users who wish to schedule Webex team meetings from Outlook begin using the Cisco Webex Scheduler add-in, which will replace Productivity Tools in the future as it reaches end of support. Visit Webex | Migrate from Productivity Tools to the Webex Scheduler Add-In for a smooth migration from Productivity Tools to the new Webex Scheduler add-in.

CISCO WEBEX HYBRID CALENDAR INTEGRATION

Learn how to deploy the hybrid calendar by following the below steps. The Hybrid Calendar service allows your Cisco Webex calendar to fully synchronize with your Office 365 calendar. This means that any time you schedule a meeting or space in Cisco Webex, it will add the meeting details to your Outlook calendar.

1. Deploy Hybrid Calendar Office 365

A user who has access as an Office 365 administrator and Webex Customer administrator will be required to deploy the Hybrid Calendar. This is usually your IT manager. Visit Cisco | Hybrid Calendar Service with Office 365 Deployment Task Flow to learn how to deploy Hybrid Calendar for your organization.
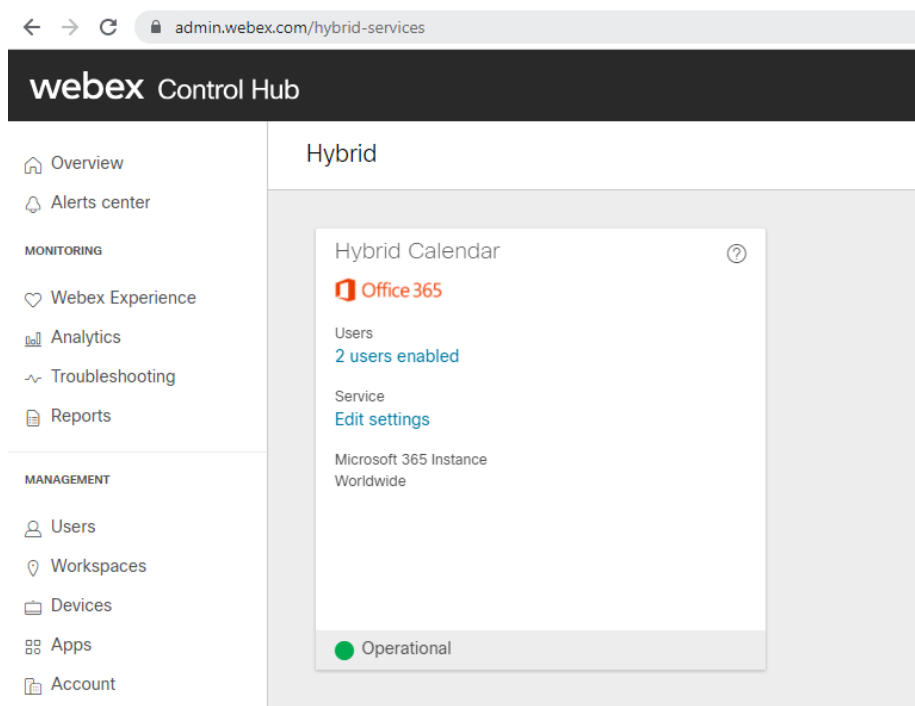
To learn how the Hybrid Calendar uses your data and to understand the provisioning process, visit Webex | Cisco Webex Hybrid Calendar Service with office 365 Integration Reference.

2. Schedule A Meeting From A Space or Your Personal Room

Once you have your Hybrid Calendar integration it is easy to schedule a meeting from a space or your calendar. You can schedule a meeting from your Webex In-App calendar by following the Webex | Schedule a Meeting from a Space or Webex | Scheduler A Meeting From the Meetings Calendar.
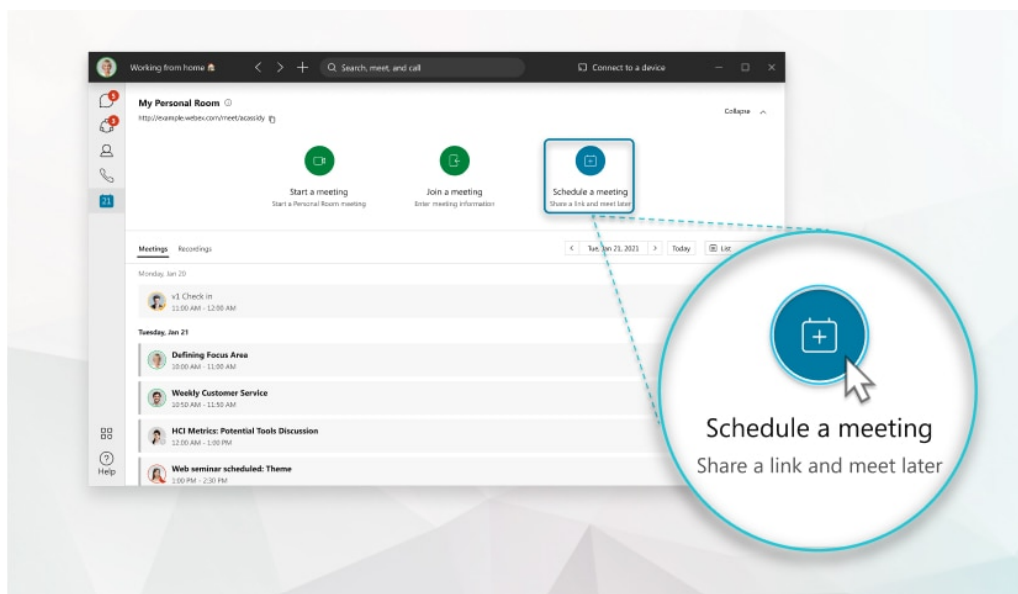
3. Using Keywords To Schedule Meetings

When you're scheduling a meeting in your work calendar, you can add a keyword to create a Personal Room meeting or a meeting associated with a space. This is only available once your account is set up with the Hybrid Calendar.

To learn how to schedule a meeting with keywords, visit Webex App | Schedule A Meeting Using @Webex or @Meet.

DIRECTORY SYNCHRONIZATION

You can add Webex to Microsoft 365 Azure Active Directory (Azure AD) and then synchronize users from the directory to your organization managed in Control Hub. This syncs your Outlook and Webex Directory by importing your Outlook Directory users into Webex. This will also need to be completed by a user who has both Webex Customer Admin and Azure Administrator privileges – usually your organization's IT manager.

To learn how to integrate Active Directory users into the control hub, visit Webex | Synchronize Azure Active Director Users into Control Hub.
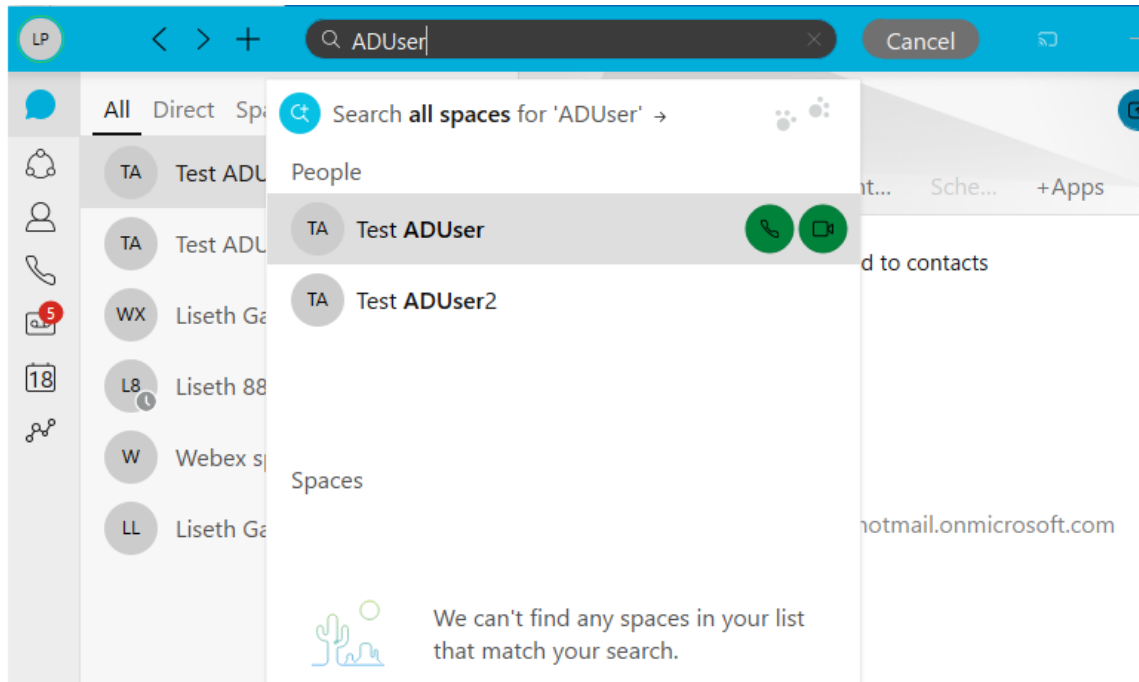
Azure Directory Imported User

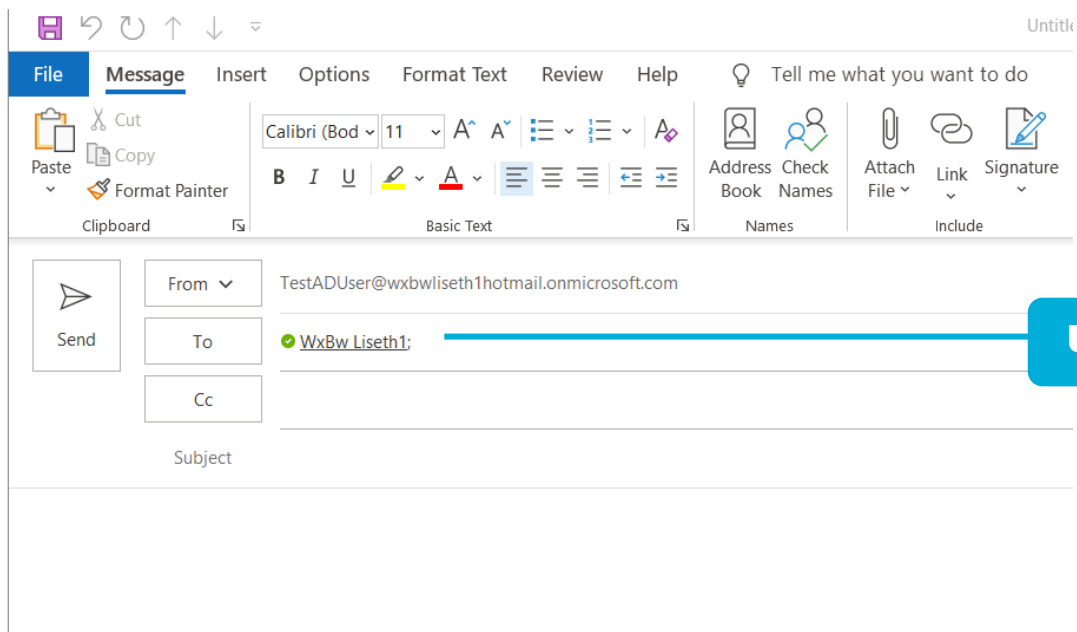**License Type Based On Imported User**

When the Azure Directory synchronization is completed, all the users the Microsoft Administrator decides to synchronize with Webex will be imported to Webex. If Webex finds an email address that doesn't have a Webex for Broadworks license, it will import this user for the purpose of synchronization only.

BASIC LICENSE	STANDARD LICENSE

Azure Directory Users Are Searchable in All Webex Clients

User Status is now fully supported. You can now see your user status available in 'To' and 'CC' email composing fields.

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