Cisco webex

Site Admininstration

User Guide

cisco

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Table of Contents

Chapter 1

Configuring Your Site 1

Changing what users see 1

Specifying a default service and page for your site 2

Changing the default page 3

Specifying a default time zone 5

Specifying the number of items in lists 5

Setting the default meeting scheduler 6

Changing the meeting information window 7

Specifying Cisco TelePresence integration options 9

Changing the WebEx navigation links 11

Changing the top navigation links 11

Customizing the left navigation links 12

Managing scheduling templates 14

Changing the session end (landing) pages 15

Hiding WebEx promotional content 16

Customizing the Event Center enrollment form 17

Changing what users can do 20

Setting default teleconference options 20
Setting default audio technical support options 23
Assigning default call-in numbers 24
Allowing users to add session information to calendars 25
Allowing users to request additional services 25
Allowing Cisco Unified MeetingPlace users to join external meetings 27
Allowing users to download WebEx Productivity tools 28
Allowing users to download WebEx Connect or AIM Pro 28
Allowing users to use text messaging 28
Allowing users to use Cisco IP phone integration 29
Allowing users to choose an alternate host 29
Allowing users to schedule meetings for other users 30
Allowing users to personalize their Personal Meeting Rooms 30
Configuring the Chat Phrase Library for Remote Support 31
Changing site management options 32
Receiving a warning when site storage capacity is exceeded 33
Transferring event host responsibilities to another person 33
Configuring site settings for Productivity Tools 34
Productivity Tool settings 34
Managing Users 39
About user accounts 40

Allowing users to request accounts from the site 41
Processing signup requests 42
Adding new user accounts 43
Selecting Queues for WebACD 45
Edit User List page 46
About editing user accounts 46
Editing single user accounts 47
Adding a single contact 48
Activating and deactivating user accounts 48
Reassigning NBR recordings 49
Deleting NBR recordings from an account 49
Setting user account privileges 50
Setting privileges for individual accounts 50
Setting privileges for all user accounts 53
Processing password requests 53
Processing service requests 54
Sending email messages to all users 54
About using tracking codes 55
Specifying tracking codes 55
Importing and Exporting Users 57
Batch Import/Export Users Page 57

Importing accounts for Cisco Unified MeetingPlace users 59
Adding multiple user accounts 59
Editing multiple user accounts 60
Status of your Import or Export 62
Adding contacts to the company address book 62
Importing contacts from Microsoft Outlook or Exchange 62
Importing contacts from a CSV file 63
Editing contact information 64
Deleting contact information 65
Using distribution lists 65
Importing tracking code values 66
Managing Event Center 69
Updating Event Center Site Settings 69
Managing Event Center scheduling templates 71
About managing Event Center scheduling templates 71
Showing or hiding Event Center scheduling templates 72
Setting the default Event Center scheduling template 72
Deleting Event Center scheduling templates 73
Reassigning an Event to a different host 73
Customizing the Event Center registration form 75

Configuring Meeting Center 85

Changing the end of meeting page 85

About using Meeting Center on iPhone 87

Enabling iPhone integration with Meeting Center 88

Managing Meeting Center scheduling templates 88

About managing Meeting Center scheduling templates 89

Showing or hiding Meeting Center scheduling template 89

Setting the default Meeting Center scheduling template 90

Deleting Meeting Center scheduling templates 90

Maximum Video Bandwidth option 91

Enabling High-Quality Video for your site 91

Media Monitoring 92

Setting Sales Center Options 93

Adding information about subject matter experts 93

Adding or editing product definitions 94

Allowing sales team members to set up sales portals 95

Allowing sales managers to monitor meetings 96

Allowing sales team members to join meetings without logging in 96

Customizing in-bound meeting branding 97

Setting Remote Support Options 101

Setting Remote Support download options 101

Allowing customers to choose agents 102
Configuring the Video Feed for Remote Support 103
Managing support session forms 103
Customizing items on the pre and post-session forms 103
Embedding the pre-session form 106
Customizing the Remote Support session window 107
Specifying options for sharing CSR applications 111
Automatically recording CSR sessions 112
Automatically ending inactive sessions 113
Customizing instructions for support representatives 114
Setting Training Center Options 117
Setting up Training Center eCommerce 117
Entering your online payment provider information 119
Switching between test and production modes 126
Adding and deleting discount coupons 127
Extending discount coupon dates 128
Entering your company information 130
Customizing the Credit Card page 130
Setting the Training Center email options 131
Customizing your email templates 131

Managing Email Templates **133**
Customizing email templates 133
Restoring the default email template 134
Managing Site Security **135**
Setting security options 135
Specifying SSO Configuration 140
Viewing Certificates 140
Specifying strong password criteria 140
Using specific characters in your passwords 141
Enabling digital certificates (PKI) 143
Managing the root certificate 144
Assigning a certificate to a session type 144
Managing Session Types **145**
About session types 145
Understanding session type features 146
Creating custom session types 149
Creating a Cisco Unified Videoconferencing (CUVC) Session Type 151
Enabling a session type for a host account 154
Changing a custom session type 154
Activating or deactivating a custom session type 154

Setting Remote Access Options 155

About Remote Access options 156

Setting up computers for Remote Access 156

Minimum system requirements 157

Setting up the Remote Access Agent for your proxy server 157

Setting default installation options 158

Sending the Remote Access installer link to users 160

Downloading the Remote Access Agent installer 162

Using a silent installer to install Remote Access 163

Specifying Remote Access security options 166

Changing access code or phone authentication options for Remote Access groups 167

Changing access code or phone authentication options for Remote Access computers 167

Changing a remote computer description or alias 168

Managing groups of Remote Access computers 169

Creating Remote Access groups 170

Assigning Remote Access groups and computers to support representatives 171

Changing the group name or description 171

Rearranging computers or groups 171

Deleting a computer or group 172

Monitoring Remote Access sessions 172

Specifying Remote Access default view and colors 173

Setting Access Anywhere Options 175

Requiring approval to set up Access Anywhere 175

Processing Access Anywhere requests 176

Viewing a list of remote Access Anywhere computers 177

Ending a user's Access Anywhere session 178

Removing a remote computer from a user's account 179

Managing WebACD 181

Managing WebACD queues 181

Creating a new queue 182

Adding new fields to the entry form 189

Rearranging fields on the entry form 190

Using Routing Rules 193

Using Allocation Rules 195

About the personal queue 198

Editing the personal queue 198

Managing leave message forms 201

Adding new fields to the leave message form 203

Rearranging fields on the leave message form 205

Assigning a leave message form to a queue 208

Viewing Reports 209

Viewing usage reports 209

Viewing recording storage usage report 210

Viewing storage utilization by user reports 211

Viewing Access Anywhere reports 211

Viewing Sales Center reports 212

Session Query Tool 213

CSR activity report 214

Call Volume report 215

URL Referrals report 216

Allocation Queue report 217

Training Center Reports 218

Using Event Center Report Builder 220

Opening Report Builder 221

Creating an Event Center report 221

Opening a saved Event Center report 224

Saving Event Center reports 224

Downloading Event Center reports 225

Editing Report Builder reports 226

Deleting Event Center reports 226

CSV File Format Reference **227**

CSV File Format for User Accounts 227

CSV File Format for Contacts 247

CSV File Format for Tracking Code Values 250

Time Zones 252

Email Template Variables **257**

Email template variables for Meeting Center 257

Email template variables for Enterprise 260

Index **267**

1

Configuring Your Site

If you want to…	See…
get an overview of specifying settings for your WebEx service site	*Changing what users see* (on page 1)
specify Cisco TelePresence integration options for Cisco WebEx Meeting Center	*Specifying Cisco TelePresence Integration Options* (on page 9)
change the navigation links for your WebEx service site	*Changing the WebEx navigation links* (on page 11)
change user options for your WebEx service site	*Changing what users can do* (on page 20)
manage your site settings	*Changing site management option* (on page 32)

Note: To manage security options such as passwords and user access, see *Managing Site Security* (on page 135).

Changing what users see

You can configure the settings on your site to reflect what you think will be of value to your users, whether it is a branding, personal, or functional issue.

- *Specifying a default service and page for your site* (on page 2)
- *Changing the default page* (on page 3)

- *Specifying a default time zone* (on page 5)
- *Specifying the number of items in lists* (on page 5)
- *Setting the default meeting scheduler* (on page 6)
- *Changing the meeting information window* (on page 7)

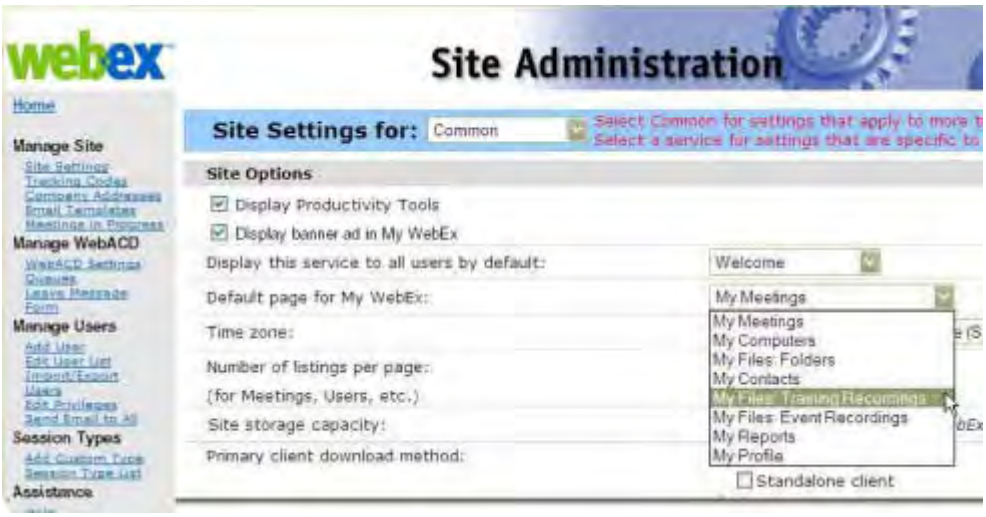
Specifying a default service and page for your site

For Enterprise sites only

You can specify the service (e.g., Meeting Center, Event Center, etc.) and the page that first appears when a user accesses your site.

To specify a default service and page for your site:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Scroll down to the **Site Options** section,
3. To specify a default service, select a service from the **Display this service to all users by default** drop-down list.
4. To specify a default page, select a page from the **Default page for** drop-down list.



5. Click **Update** to save your changes.

Note: You can also change the order that the services that appear on the navigation bar. For details, see *Changing the top navigation links* (on page 11).

Changing the default page

For Meeting Center, Event Center, Sales Center, and Training Center only

You can specify the page that appears when users log in. Users can override your settings and select a different default page in their My WebEx profiles.

To specify a default page:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. At **Site Settings for**, select the service whose default page you want to change.
3. In the **Default Options** section, select one of the following default page options. (See tables below.)
4. Click **Update**.

Event Center default page options

Option	Description
List of Events	Displays a list of scheduled events.
Event Recordings	Displays a list of event recordings.
Search	Displays page where users can search for events.
Schedule an Event	Displays the event scheduler page.
Site Events	Displays all event that have been scheduled on your site.

Sales Center default page options

Option	Description
Browse Meetings - Daily View	Displays a list of scheduled sales meetings, sorted by date.
Browse Meetings - Today View	Displays a list of the day's scheduled sales meetings.
Browse Meetings -	Displays a list of the current week's scheduled sales meetings.

Option	Description
Weekly View	
Browse Meetings - Monthly View	Displays a list of the current month's scheduled sales meetings.
Join an Unlisted Meeting	Displays a page where meeting attendees can join unlisted meetings.

Meeting Center default page options

Option	Description
Browse Meetings - Daily View	Displays a list of scheduled sales meetings, sorted by date.
Browse Meetings - Today View	Displays a list of the day's scheduled sales meetings.
Browse Meetings - Weekly View	Displays a list of the current week's scheduled sales meetings.
Browse Meetings - Monthly View	Displays a list of the current month's scheduled sales meetings.
Join an Unlisted Meeting	Displays a page where meeting attendees can join unlisted meetings.
My Scheduled Meetings	Displays a list that shows only meetings that the user scheduled.
Start and Instant meeting	Displays a page where users can start One-Click meetings.

Training Center default page options

Option	Description
Browse Meetings - Today View	Displays a list of the day's scheduled training sessions.
Browse Meetings - Upcoming View	Displays a list of all upcoming training sessions.
Browse Meetings - Daily View	Displays a list of scheduled training sessions, sorted by date.

Option	Description
Browse Meetings - Weekly View	Displays a list of the current week's scheduled training sessions.
Browse Meetings - Monthly View	Displays a list of the current month's scheduled training sessions.
Recorded Sessions	Displays a page with a list of uploaded training sessions.
Join an Unlisted Session	Displays a page where meeting attendees can join unlisted training sessions.
Start an Instant Session	Displays a page where a host can start an instant training session.

Specifying a default time zone

You can set a default time zone for your WebEx service site so that all times, including the starting and ending times for meetings, are displayed in the time zone you select. You change the time zone for individual users by editing their accounts (see *Editing single user accounts* (on page 47)), and users can override this setting by selecting their own time zone when they request accounts or on the My Profile page in My WebEx.

To specify a default time zone for your WebEx service:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Options** section, select a time zone from the **Time Zone** drop-down list.
3. To display the GMT offset for timezones in emails and web pages, select the **Display the GMT offset for timezones in emails and web pages** check box.
4. Click **Update**.

Specifying the number of items in lists

You can specify the number of items that appear on each page of the various lists. For example, you can specify the number of items that appear on each page of the Meeting Calendar or user address books.

To specify the number of items that appear in lists on your Web site:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Under the **Site Options** section, specify a number of items in the **Number of listings per page** box.
3. Click **Update**.

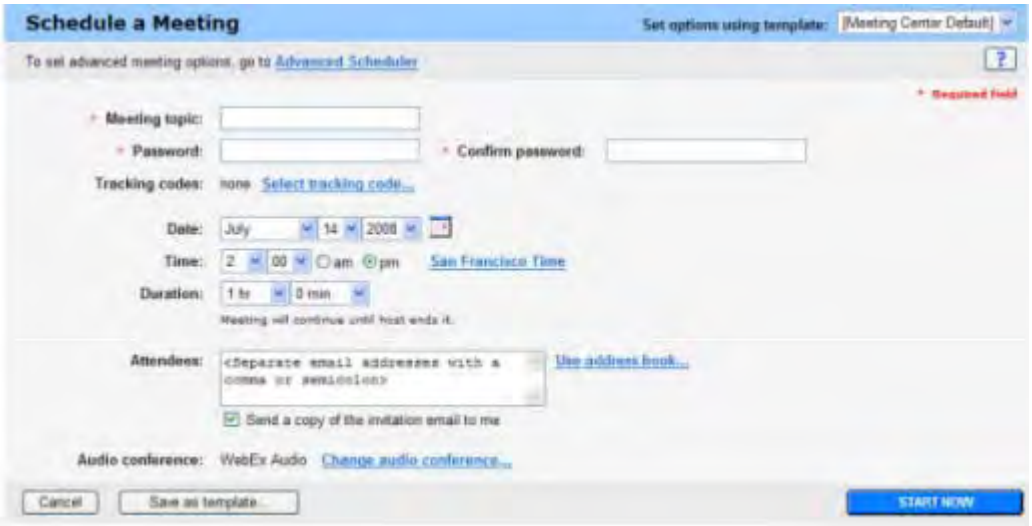
Setting the default meeting scheduler

For Meeting Center and Sales Center sites only

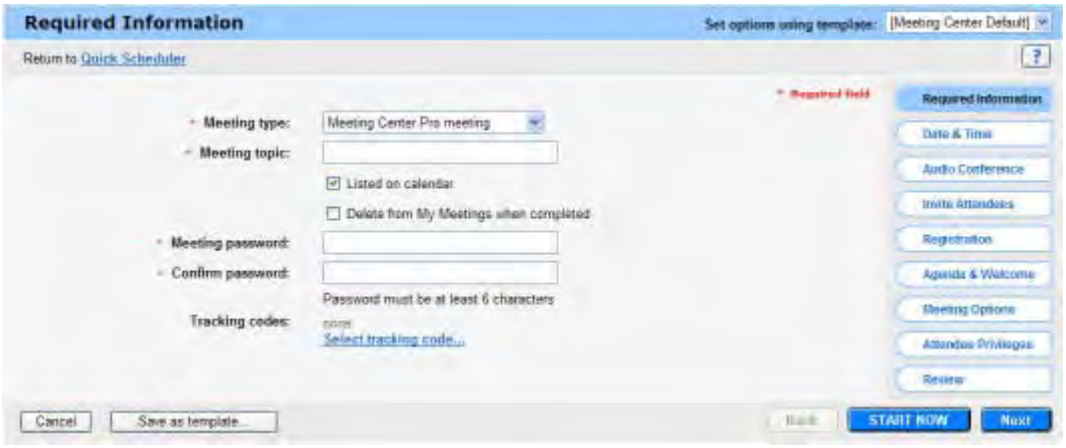
WebEx provides two meeting schedulers:

- The Quick Scheduler, a one-page scheduler with basic options, or
- The Advanced Scheduler that offers more comprehensive options.

The Quick Scheduler (it provides a link to the Advanced Scheduler)



The Advanced Scheduler



Note: Setting a default meeting scheduler does not prevent hosts from using Outlook or Lotus Notes from scheduling meetings from those applications.

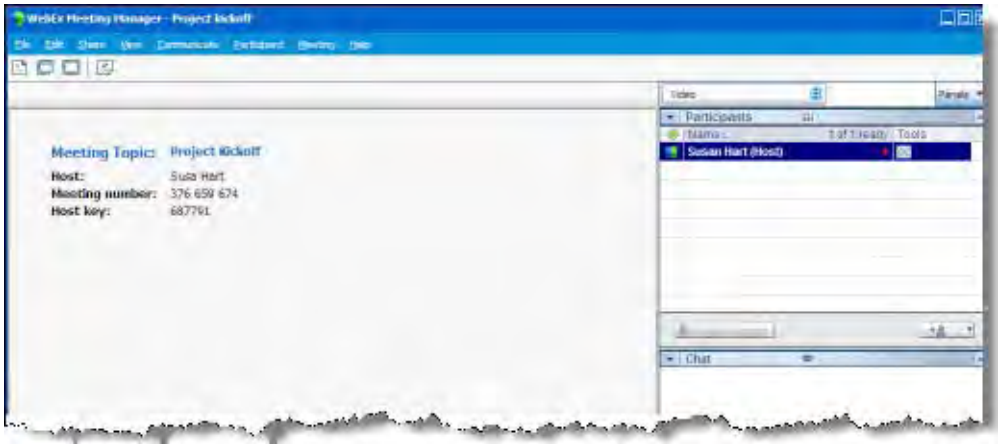
To specify a default meeting scheduler:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Account Management Settings** section, select **Quick Scheduler is default or Advanced Scheduler is default**.
3. Click **Update**.

Changing the meeting information window

For Meeting Center and Sales Center only

You can change the meeting information window that appears during WebEx meetings. During the meeting, the window display general information about the meeting such as the topic, the host name, and teleconferencing information.



To create a new template, you can use Microsoft PowerPoint to edit the default template. You can add additional information and graphics or change the color scheme. Hosts can select your new page design (also called a template) when scheduling a meeting.

To create a meeting information template:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Scroll down to the **Site Options** section, under **Info Tab specific**, click **Create Template**.
3. Click **Open** to open the file in PowerPoint.

4. Change the template as needed and save it.

Important: Do not modify or remove existing meeting information or agenda in the default template.

5. Once you finish editing, in Site Administration click **Add Template**.
6. On the Select File page that appears, browse to the template that you created and click **Open**.
7. Click **Upload** to add the new template to your templates list on the Site Settings for Common page. All templates listed are added to the host's Info Tab list box in the Scheduler.
8. Set the order in which the host sees the templates by moving them up or down using the **Move Up** and **Move Down** buttons. Delete templates using the **Delete** button.
9. Click **Update** to save your changes.

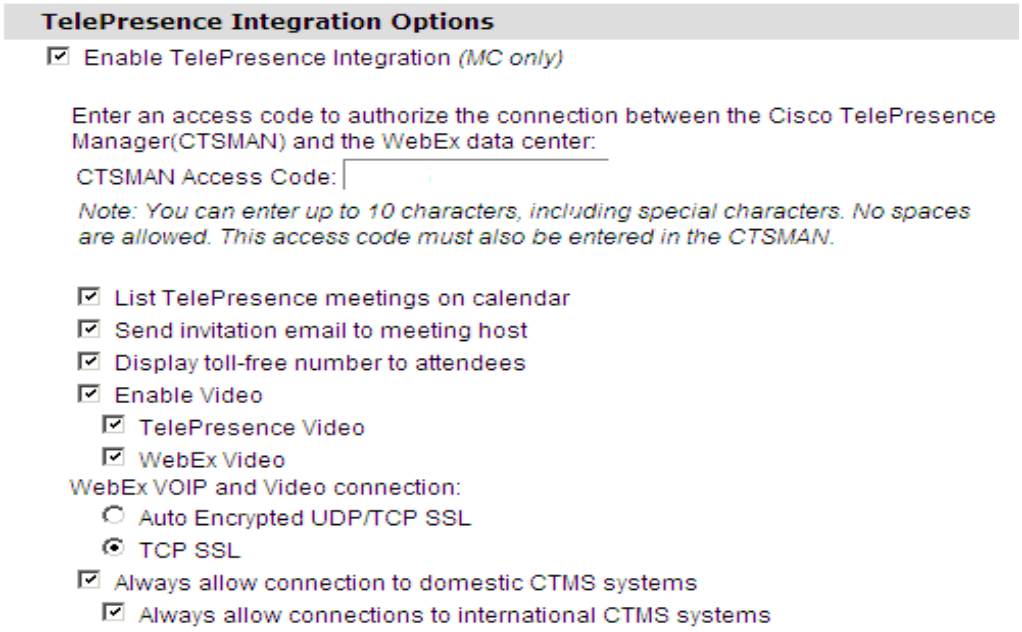
Specifying Cisco TelePresence integration options

For Meeting Center only

You can specify settings for Cisco TelePresence integration with Meeting Center. After you have successfully enabled Cisco TelePresence integration with Meeting Center, you can schedule meetings in a Cisco TelePresence session.

To specify Cisco TelePresence integration options:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Scroll down the page until you see the **TelePresence Integration Options** section.



3. Select **Enable TelePresence Integration (MC only)**. If you do not select this option, the rest of the TelePresence integration options will be grayed out.
4. In the **CTSMAN Access Code field**, enter the access code that authorizes the connection between the Cisco TelePresence Manager and the Cisco WebEx data center.

Note: CTSMAN, or Cisco Telepresence System Management is the Telepresence Scheduler server that is responsible for scheduling Cisco TelePresence meetings. In addition to entering the CTSMAN access code here, enter the same access code in the CTSMAN server. Your access code should not exceed 10 characters.

5. Select **List TelePresence Meetings on calendar** if you want Cisco TelePresence meetings to be listed on your Meeting Center calendar.

Note: If you don't select this option, users will still be able to host and join Cisco TelePresence meetings. However, these Cisco TelePresence meetings won't be visible on the calendar.

6. Select **Send invitation email to meeting host** to enable the system to send the meeting invitation to the meeting host.
7. Select **Display toll-free number to attendees** to enable the system to show the toll-free number that attendees can call to join the meeting.

8. Select **Enable Video** to enable video during the Cisco TelePresence meeting. You can select either or both of the following options for enabling video:
   - **TelePresence Video:** To enable video for a Cisco TelePresence meeting.
   - **WebEx Multipoint Video:** To enable video for a Cisco WebEx site in a Cisco TelePresence meeting.
9. Under **WebEx VOIP and Video connection**, select either:
   - **Auto Encrypted UDP/TCP SSL:** To allow the Cisco TelePresence Multipoint Server (CTMS) to connect over UDP with the TelePresence Gateway. If the UDP connection is not allowed, CTMS will fall back to TCP.
   - **TCP SSL**: To connect over TCP over a SSL connection.
10. Select **Always allow connection to domestic CTMS systems**.
11. Select **Always allow connections to international CTMS systems**.

Changing the WebEx navigation links

You can change the order in which the buttons appear on the navigation bar that appears at the top of your WebEx Enterprise Edition site. For example, if your site provides Meeting Center and Training Center, you can change the order of the Meeting Center and Training Center buttons in the navigation bar.

- *Changing the top navigation links* (on page 11)
- *Customizing the left navigation links* (on page 12)

Changing the top navigation links

For Enterprise Edition sites only

To customize the top navigation bar:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Scroll down to the **Top Navigation Bar Configuration** section.

See a list of all buttons that can appear on the navigation bar for your Enterprise site. The first button in the list appears in the far left position on the navigation bar. If a service is not available on your site, it appears in parentheses ().

3. If you want to include services that are not enabled for the site in the list, check the **Display services that are not enabled for this site** box.

Note: Site Administration button option is only visible to hosts with Site Administration privileges.

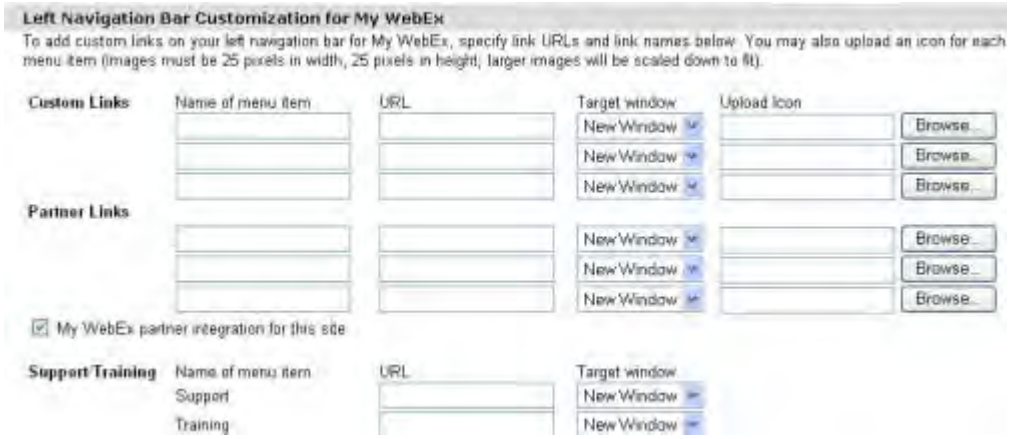
4. Select a service and then click the **Move Up** or **Move Down** buttons to change the order the buttons appear on the navigation bar.
5. If you want to display the WebEx Community button, check the **Display Community button on navigation bar** box.
6. Click **Update** to save your changes.

Customizing the left navigation links

You can change or add up to three links to the left navigation bar to link to any Web page or document. You can also add images to the left navigation bar.

To add links to left navigation bar:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Do one of the following:
   - Scroll down to the **Left Navigation Bar Customization for My WebEx** section.
   - Scroll down to the **Left Navigation Bar Customization for All Services** section.



3 Follow these steps in the section that corresponds to the type of link (custom, partner, or support/training) you are adding:

- Enter a name for the link at **Name of menu item**.
- Enter the **URL** you want to display when users click the link.

Note: You do not need to type "http://" in the URL.

- At **Target window**, indicate where you want the Web page or document to display:

Option	Description
New Window	To display the page in a new browser window.
Main	To display the page in the main frame of a web page that uses frames.
Parent	To display the page in the parent frame of a web page that uses frames.
Top	To display the page in the top frame of a web page that uses frames.

- If you are creating a custom link in My WebEx and want to display an image (up to 25 x 25 pixels) that users can click, instead of a link, click **Browse** and select an image file from your computer.
- If you are creating a custom link in My WebEx for all services and want to add the links to a new group, enter the group name at **Group label for custom links**.

4 Click **Update** to save your changes.

Managing scheduling templates

Hosts who often schedule WebEx sessions with the same information (such as tracking code, attendees, etc.) can use scheduling templates to save those settings to quickly set up future sessions. WebEx provides standard scheduling templates that are available to all hosts, but hosts can create personal templates as well.

As site administrator, you can:

- Show, hide, or delete any standard template
- Make any standard template the default template

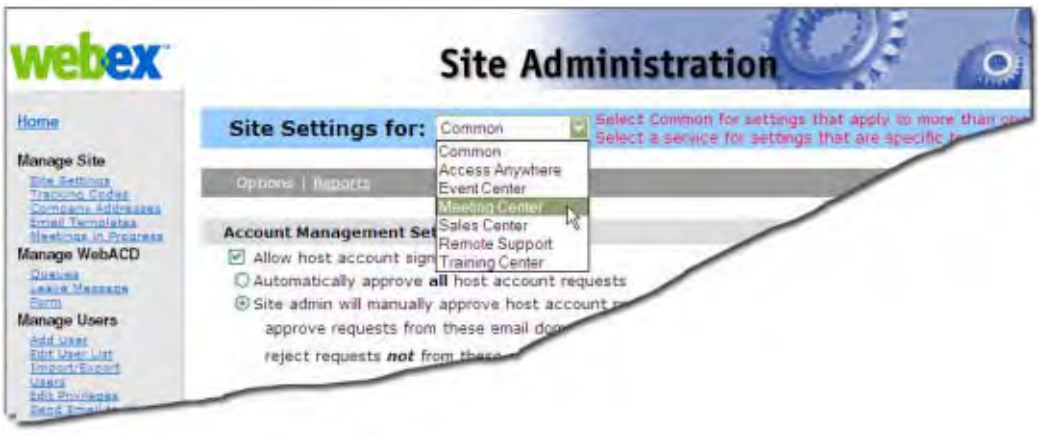
Changing the default scheduling template

Use this procedure to set the default scheduling template.

To change the default scheduling template:

1 Under **Manage Site**, click **Site Settings**.

2 At **Site Settings for**, select the service whose template you want to change.



3 Scroll down to **Standard Scheduling Templates**.

4 In the **Set as Default** column, select the template that you want to make the default template.

5 Click **Update Site Settings**.

Showing or hiding scheduling templates

Use this procedure to show or hide any standard template on the list of available templates in the meeting scheduler; this does not effect the personal templates that users create.

To show or hide scheduling templates:

1 Under **Manage Site**, click **Site Settings**.

2 At **Site Settings for**, select the service whose template you want to change.

3 Scroll down to **Standard Scheduling Templates**.

4 Check or uncheck **Make Visible** next to the appropriate template.

5 Click **Update Site Settings**.

Deleting scheduling templates

Use this procedure to delete standard scheduling templates.

Note: You cannot delete the default template.

To delete scheduling templates:

1 Under **Manage Site**, click **Site Settings**.

2 At **Site Settings for**, select the service whose template you want to change.

3 Scroll down to **Standard Scheduling Templates**.

4 Select the check box to the left side of the template that you want to delete.

5 Click **Delete Template(s)**.

Changing the session end (landing) pages

For Meeting Center and Sales Center only

You can change the page that displays when a WebEx session ends. WebEx displays one page for hosts and another page to attendees; you can use this procedure to change both pages.

To change landing pages:

1. Under **Manage Site**, click **Site Settings**.
2. At **Site Settings for**, select the service whose page you want to change.
3. For each type of page you want to use a customized page, do the following:
   a) In the **Site Options** section, click **Use customized page**.
   b) At **URL**, enter the URL of the page that you want to display when sessions end.
4. For each type of page you want to use the standard WebEx page, select **Use WebEx branded default page**.
5. Scroll to the page bottom and click **Update Site Settings**.

Hiding WebEx promotional content

For Meeting Center, Event Center, Sales Center, Training Center, and Remote Support only

Certain pages, such as the standard WebEx end-of-session (landing) pages, the join pages, and invitation email messages, contain messages that introduce WebEx features. You can use this procedure to remove this promotional content from those pages.

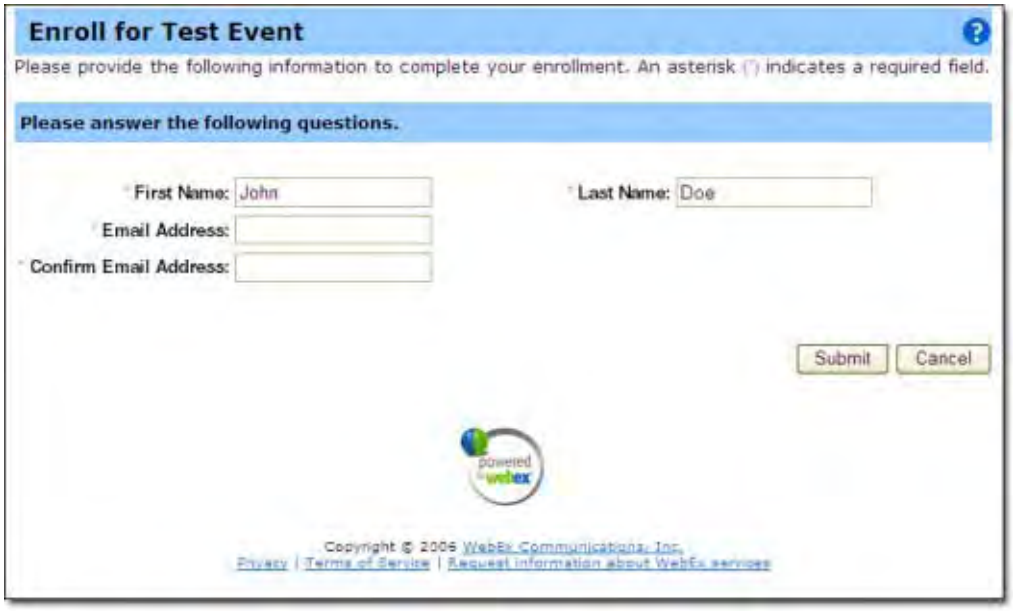
To hide WebEx promotional content:

1. Under **Manage Site**, click **Site Settings**.
2. At **Site Settings for**, select the service whose page you want to change.
3. In the **Site Options** section, clear the **Show promotional content** check box for each item where you want to hide promotional content.
4. *(Event Center and Sales Center only)* To change the Event Center promotional page, scroll down to the **Promotion** section and enter a new page URL at **Promotion page url.**
5. Click **Update**.

Customizing the Event Center enrollment form

You can customize the enrollment form that WebEx send to event enrollees. Event hosts can further change the default enrollment form when they schedule an event.

The default enrollment form



To customize the default Enrollment form:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**
2. At **Site Settings for**, select **Event Center**.
3. Click the **Required Fields** link.

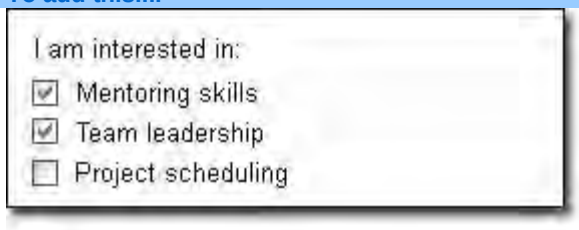
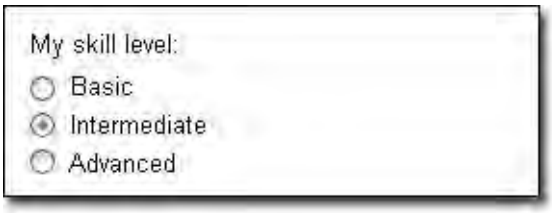
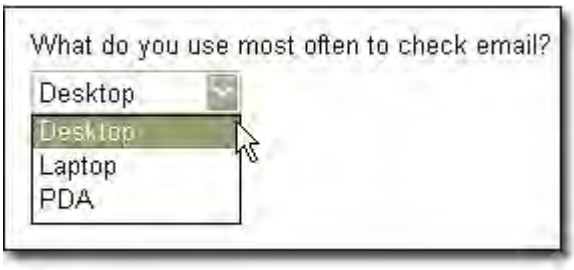
4 Under **Standard Options**, select the information you want to require that users provide on the form.

5 To add new entries to the form, in the **My Custom Options** section, select the type of item you want to add. See tables below for more information.

6 To change the order of the custom options, click the up and down arrows under **Change Order**.

7 Click **Save**.

To add this....	Do this....
Text Boxes A text box that users can use to enter an answer (up to 256 characters)	To add text boxes: 1) Click **Text Box**. 2) At **Text box label,** enter the text you want to appear next to the box. 3) At **Type**, indicate if you want the text to appear in a single or multiple lines. 4) At **Width** enter the number of characters. 5) Click **Save**.
Check Boxes Check boxes that users can use to select one or more answers	To add check boxes: 1) Click **Check Boxes**. 2) (Optional) At **Group label...,** enter the text you want to appear before a group of check boxes. 3) To add more than 9 check

To add this....	Do this....
	boxes, at **Add** select the total number of check boxes you want to create. 4) Next to **Check box..**. enter a name for the check box. 5) To display the check boxes as selected, select **Selected** from the drop-down list. 6) Repeat Steps d and e for each check box you want to add to the form. 7) Click **Save**.
Option Buttons Option buttons that users can use to select a single answer 	To add option buttons 1) Click **Option Buttons**. 2) (Optional) At **Group label...,** enter the text you want to appear before a group of buttons. 3) To add more than 9 option buttons, at **Add** select the total number of buttons you want to create. 4) Next to **Choice..**. enter a name for the option button. 5) At **Default choice**, select the choice that is selected by default. 6) Click **Save**.
Drop-down lists A drop-down list from which users can use to select a single answer 	To add drop-down lists: 1) Click **Drop-Down List**. 2) At **Label...,** enter the text you want to appear before a group of buttons. 3) To add more than 9 list items, at **Add** select the total number of items you want to create. 4) Next to **Choice..**. enter a name for the option button. 5) At **Default choice**, select the choice that is selected by default. 6) Click **Save**.
Questions A question that you saved from an existing enrollment	To add questions:

To add this....	Do this....
form	1) Click **Saved Questions**. 2) Select the question you want to use. 3) Click **Add**.

Changing what users can do

You can set various options to change the default behavior of your WebEx service site:

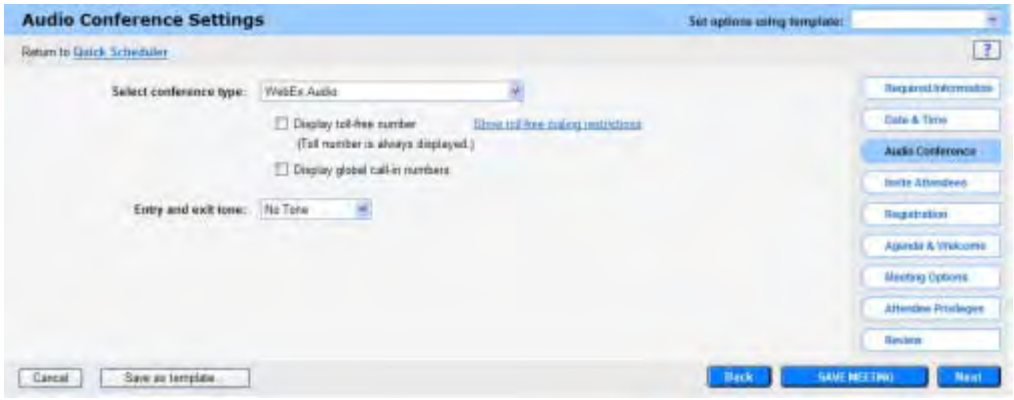
- *Setting default teleconference options* (on page 20)
- *Setting default audio technical support options* (on page 23)
- *Assigning default call-in numbers* (on page 24)
- *Allowing users to add session information to calendars* (on page 25)
- *Allowing users to request additional services* (on page 25)
- *Allowing users to change the Cisco Unified MeetingPlace settings* (on page 27)
- *Allowing users to download the productivity tools* (on page 28)
- *Allowing users to download WebEx Connect or AIM Pro* (on page 28)
- *Allowing users use text messaging* (on page 28)
- *Allowing users to use Cisco IP phone integration* (on page 29)
- *Allowing users to choose an alternate host* (on page 29)
- *Allowing users to schedule meetings for other users* (on page 30)
- *Allowing users to personalize their Personal Meeting Rooms* (on page 30)
- *Configuring the Chat Phrase Library for Remote Support* (on page 31)

Setting default teleconference options

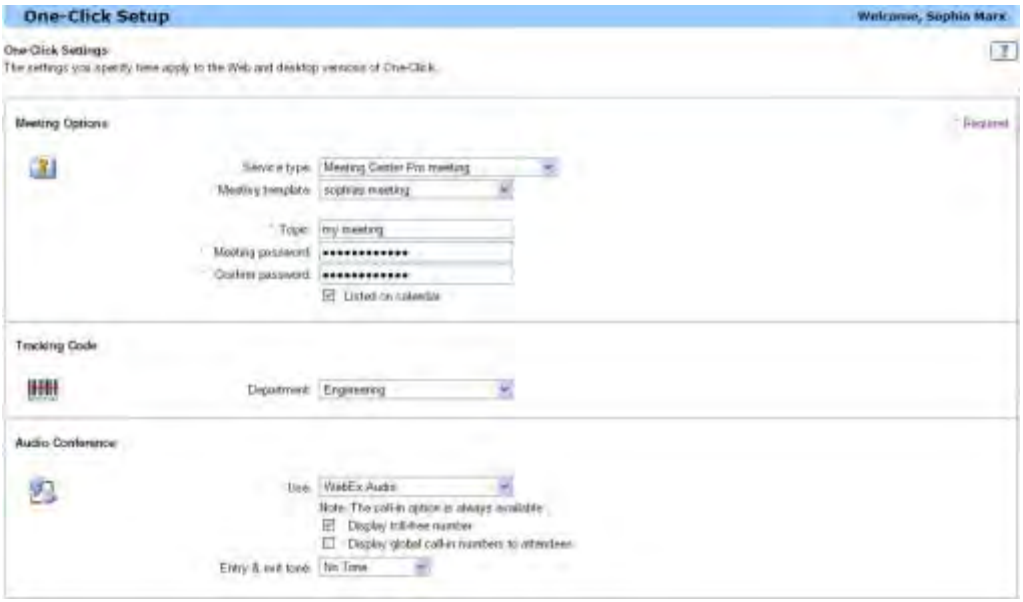
(Meeting Center, Event Center, Training Center, and Sales Center only)

You can specify the default audio options from those that are available on your site. These options will then appear as the default selection on the WebEx scheduling pages, the Microsoft Outlook scheduler, and the One-Click setup wizard.

Default Meeting Center scheduler options



Default One-Click scheduling options



You can also specify that users can automatically join call-back teleconferences without having to press "1" on their phone keypads. This option is useful if participants reside in some European countries where the phone system cannot send keypad tones.

If you use the WebEx Audio option, you can have WebEx play a sound when participants joins and leave teleconference.

To specify default teleconferencing options:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. To have WebEx play a sound as participants join and leave sessions, at **Telephony entry and exit tone** select one of the following options:

Option	Description
Beep	WebEx sounds a simple tone.
Announce name	WebEx asks participants to state their name as they join the meeting and then announces the participant's name.

3. To allow users to join call-back teleconferences without pressing "1", scroll down to **Default Options**, then select **On** next to **Join teleconference without pressing "1"**.
4. In the **Default site audio options** section, select any of the following default options:

Note: Your selections only determine the default settings—users can select other options as they schedule sessions. Please also note that not all of the options listed below will be available on your site.

Option	Description
Integrated VoIP	Select this to use voice over IP (VoIP) where the session audio is sent over the Internet instead of using the phone.
None	Select this to exclude audio conferencing from your site.
WebEx teleconferencing	Select this to use the phone for the session audio. Select any of the following options: ▪ **Toll** or **Toll free**—To allow participants call in, select one of these options to provide a toll or toll-free call-in number. ▪ **Allow access to teleconference via global call-in numbers**—Select this to provide a local phone number for attendees in other countries to use when calling into WebEx sessions. The local numbers that are available depend on how your WebEx site is configured. *This option is for Event Center and Sales Center only.* ▪ **Call-in teleconferencing**—Select this to have users

Option	Description
	call in to join sessions. *This option is for Event Center only.* ▪ **Call-back teleconferencing**—Select this to have WebEx call users as they join sessions. *This option is for Event Center only.*
Other teleconference service	If you have set up another teleconference service to use with WebEx sessions, you can select that option.

5 Scroll to the page bottom and click **Update** to save your changes.

Setting default audio technical support options

(Meeting Center, Event Center, Training Center only)

You can specify the default audio technical support options to enable hosts to get help during a meeting or event.

To specify audio technical support options:

1 On the left navigation bar, under **Manage Site**, click **Site Settings**.

2 Scroll down to Default Options to view the audio technical support options.

3 To enable Instant Help for customized technical support routing, select the **Instant Help** box.

4 Enter the appropriate information in the following fields:

Option	Decription
Technical Support Primary phone number	Enter a name for the primary technical support number or keep the default name. Enter the full phone number (including country/region code) for support.
Roll-over delay	Enter the amount of seconds (ranging from 10 to 300 seconds) to pass before the support call is rolled over to the secondary technical support number.

Option	Decription
Technical Support Secondary phone number	Enter a name for the secondary technical support number or keep the default name. Enter the full phone number (including country/region code) for support. After the specified amount of time, the support call rolls over to this secondary number.

5 Click **Update**.

Assigning default call-in numbers

(Meeting Center and Training Center only)

You can enable the option to assign two default call-in numbers for all users on your site. The default selections are chosen from those provisioned for your site.

In addition, you can also allow meeting and session hosts to configure their own two featured numbers that they wish to be available for their participants.

Note: Enabling these options will allow access to the teleconference via global call-in numbers by default.

To select default call-in numbers for your site:

1 On the left navigation bar, under **Manage Site**, click **Site Settings**.

2 On the Common page under Site Options, select the **Assign default call-in numbers** check box.

3. Select a call-in option from the list on the left and click **Add**. You can select two options from those available on your site.
4. Select one of your chosen options and move it up or down for the order in which it will appear on your site.
5. Click **Update**.

To allow the meeting and session hosts to choose the default call-in numbers:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. On the Common page under Site Options, select the **Allow user to set default call-in numbers** check box.
3. Click **Update**.

Allowing users to add session information to calendars

For Meeting Center, Sales Center, Training Center, and Event Center only

Use this procedure to enable iCalendar functionality on your site. iCalendar is a standard calendaring format that makes it possible to send calendar information to another person so that they can automatically entered the information into their schedule.

With this feature enabled, users can click an **Add to My Calendar** button in the WebEx session information page to automatically add or remove session information in their calendars. The iCalendar file can also be sent in an email messages and then opened to add the session information to a calendar.

To allow users to add meeting information to their calendars:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Scroll to the bottom of the Site Options section.
3. Select the **iCalendar** check box to show the **Add to My Calendar** button in the WebEx session information page.

Allowing users to request additional services

For Enterprise Edition sites only

If you have not enabled all WebEx services on your Enterprise Edition site, you can allow users to request additional services and privileges from the site. With this option enabled:

- A user can see and click the tab for a service for which they do not yet have host privileges.
- WebEx displays a sign up page.
- The request is then placed in a queue so that you can approve or deny the request.

To specify service request options:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Scroll down to **Service Request Settings**, and click **Allow users to request additional services**.
3. If you want to have all requests automatically approved, click **Automatically approve all service requests**.
4. To have requests placed in a queue for approval, click **Site admin will manually approve service requests...** and then choose from the following options:

Option	Description

Approve requests from these email domains	Use this option to automatically accept requests from a domain. Enter the URL here in this format:
	`webex.com`
	You can use an asterisk to indicate that any characters can be substituted for a portion of the domain name:
	`*.webex.net`
	To specify multiple domains, separate each domain with commas (but no spaces).
	`webex.com,*.webex.net,webex.org`

Reject requests not from these email domains	Use this option to automatically reject requests that do not originate from a certain domain. Enter the domain from which you accept requests in this format:
	`webex.com`
	You can use an asterisk to indicate that any characters can be substituted for a portion of the domain name:
	`*.webex.net`
	To specify multiple domains, separate each domain with commas (but no spaces).

Option	Description
	`webex.com,*.webex.net,webex.org`
All site administrators	Select this option to have all requests that are automatically rejected sent to all site administrators for consideration.
Selected site administrators	Select this option to have all requests that are automatically rejected sent to a specific site administrators for consideration. Then enter the email address of that site administrator in the box.

5 Scroll to the page bottom and click **Update** to save your changes.

Allowing Cisco Unified MeetingPlace users to join external meetings

For Meeting Center only

Note: This option will be available only if your WebEx site is provisioned with the following:

- The Cisco Unified MeetingPlace integration option
- The WebEx Node for MCS option

You can set the default behavior in the meeting scheduler and Productivity Tools scheduler for whether to allow attendees located on the public internet to join a meeting. The option first must be turned on for a meeting host in order to allow external attendees to join a meeting. If the setting is not selected in the scheduler, only attendees within the same internal network can join a meeting.

To set the privilege for a meeting host to allow external attendees:

1 On the left navigation bar, under **Manage Users**, click **Add User** to set up a new user account. To update existing user accounts, click **Edit User List** and then select a user.

2 Scroll down to the **Privileges** section.

3 Next to **Meeting Center**, select **Allow external attendees**.

4 Scroll to the bottom of the page and click **Add** or **Update** to save your changes.

To set the default behavior in the scheduler to allow external attendees:

1 On the left navigation bar, under **Manage Site**, click **Site Settings**.

2. Scroll down to **Cisco Unified MeetingPlace Integration Settings**.
3. To allow external attendees, check **Default MP external attendees** *(MC only)*.
4. Scroll to the bottom of the page and click **Update** to save your changes.

Allowing users to download WebEx Productivity tools

You can display the Productivity Tools page when hosts log in to your WebEx site. This page informs the hosts about add-on tools, such as the WebEx integrations with Microsoft Office, Outlook and Lotus Notes, One-Click, and Instant Messenger Integration. The tools that appear on this page depend on the options that are enabled for your WebEx site. Contact your WebEx representative for information on disabled controls.

To display productivity tools page:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. You will see Options, Productivity Tools, and Reports links. Select the **Productivity Tools** link.
3. To allow users to update their WebEx Productivity Tools, check the box next to each tool you want to allow them to update.
4. Click **Update**.

Allowing users to download WebEx Connect or AIM Pro

You can allow users to download and use WebEx Connect or AIM Pro and enable integration with WebEx Services.

To enable presence integration:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Under Site Options, check the **Presence Integration** box.
3. Click **Update**.

Allowing users to use text messaging

You can allow users to use text messaging (SMS) and enable integration with WebEx Services.

To enable text messaging:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Under Site Options, check the **Enable text messaging (SMS)** box.
3. Click **Update**.

Allowing users to use Cisco IP phone integration

You can allow users to use Cisco IP phones and enable integration with WebEx Services.

To enable Cisco IP phone integration:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. Select the **Productivity Tools** tab and scroll down to Integrations.
3. Select the **Cisco IP Phone** check box.
4. Click **Update**.

Allowing users to choose an alternate host

For Meeting Center, Event Center, and Sales Center only

You can allow hosts to designate another person to be the "alternate host" for a WebEx session. A user might do this, for example, if they schedule a meeting but plan to join late and want the alternate host to start and run the meeting.

Note: The alternate host must also have a WebEx host account.

To allow users to choose an alternate host:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. At the bottom of the **Account Management Settings** section, select **When scheduling a meeting, users can choose an alternate host**.
3. Scroll down to the bottom of the page and click **Update**.

Allowing users to schedule meetings for other users

For Meeting Center, Event Center, and Sales Center only

Use this procedure to allow users to schedule meetings for other users.

Note: Users who schedule meetings must also have a WebEx host account.

To allow users to schedule meetings for other users:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. At the bottom of the **Account Management Settings** section, select **Users can let other users schedule meetings on their behalf.**
3. Scroll down to the bottom of the page and click **Update**.

Allowing users to personalize their Personal Meeting Rooms

You can allow all users to personalize their Personal Meeting Rooms by adding an image to page header.

Note:

- Once you allow users to customize their Personal Meeting Room headers, the **Customize branding of header area** option appears on the My Profile page for each user:
- If you later change the location of the header image and a user has already uploaded an different image, the image will move to the new location that you specify.
- A user can always add a welcome message and a picture on the Personal Meeting Room page, whether or not you select this option. This option provides the user with the additional ability to add a banner image at the top of the page.

To allow users to personalize their Personal Meeting Room page:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Options** section, select **Allow host to customize Personal Meeting Room branding**.
3. In the drop-down list, specify where the custom header will appear on the Personal Meeting Room page (replace, above, or below existing header).
4. Click **Update**.

Configuring the Chat Phrase Library for Remote Support

Remote Support only

You can create and save frequently used messages or questions for Remote Support agents to use during customer chat sessions. You can create sentence groups, which can be associated with specific agents or queues.

To configure the settings for the Chat Phrase Library:

1. Sign in to the site administration tool.
2. Under Manage Site on the left navigation bar, select **Site Settings**.
3. Select **Common** from the site settings drop-down menu.
4. Scroll down to the Chat Preferences section and click the **Chat Phrase Library** link.
5. Continue the configuration using the following procedures:
   - *Creating frequently used sentences and groups* (on page 31)
   - *Associating sentence groups with agents and queues* (on page 32)

Creating frequently used sentences and groups

You can create a group of frequently used sentences that an agent can use during a remote support session. You can add new groups or sentences at any time.

To add new groups:

1. Click **Add New Group**.
2. On the Group & Sentences tab, enter a group name and click **Save**.

To add a sentence group:

1. In the Frequently Used Sentence section, click **Add New Sentence**.
2. On the Add Frequently Used Sentence window, enter a sentence name.
3. Enter your sentence content into the Sentence field. You can select variable options from the drop-down menu to enter into your sentence.
4. Click **Save**.

To copy a frequently used sentence

You can quickly create a new sentence by leveraging one of your existing ones.

1. Click **Copy from**....
2. Select the sentence, open it up, and edit it to create a new one.
3. Click **Save**.

Associating sentence groups with agents and queues

Once you have created frequently used sentence groups, you can associate them with specific agents or with specific remote session queues. Both agents and queues can be assigned multiple frequently used sentence groups.

To associate a sentence group with an agent or queue:

1. Select the Associated Agents and Queues tab.
2. To select your group to be associated with all agents and queues, select the check box.
3. From the Agents field, highlight the agents that you want to associate with the group and click **Add**.
4. From the Queues field, highlight the queues that you want to associate with the group and click **Add**.
5. Click **Save**.

Changing site management options

You can modify various site management options such as the storage space allocated to users and event host settings.

- *Receiving a warning when site storage capacity is exceeded* (on page 33)
- *Transferring event host responsibilities to another person* (on page 33)

Receiving a warning when site storage capacity is exceeded

Your WebEx service site provides a limited amount of storage space that users can use to store files and recordings in the My Files area of My WebEx. Once the capacity for your site is exceeded, users cannot store more files on the site. If this happens, you can set this option so that you will receive a warning message the next time you log in to Site Administration.

To receive a warning when your site's storage capacity is exceeded:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Options** section, select **Notify site administrator if storage usage exceeds __% of total allocated space**.
3. Specify the percentage of total allocated space at which you want to receive a warning message.
4. Click **Update**.

Transferring event host responsibilities to another person

You can allow event hosts to transfer host responsibilities to another person. The event is then removed from the original host's My Meetings page and appears on the new host's My Meetings page. The new host can edit the event to change any information about it, including the password.

To transfer event host responsibilities:

1. On the left navigation bar, under **Manage Site**, click **Site Settings**
2. In the Site Settings for drop-down list, select **Event Center**.
3. Click the **Host Reassignment** link.
4. Click **Reassign** next to the event that you want to reassign, then select a new host in the list.
5. Click **Reassign**. An email notification is sent to both the new and previous hosts.
6. Click **OK** on the confirmation screen.

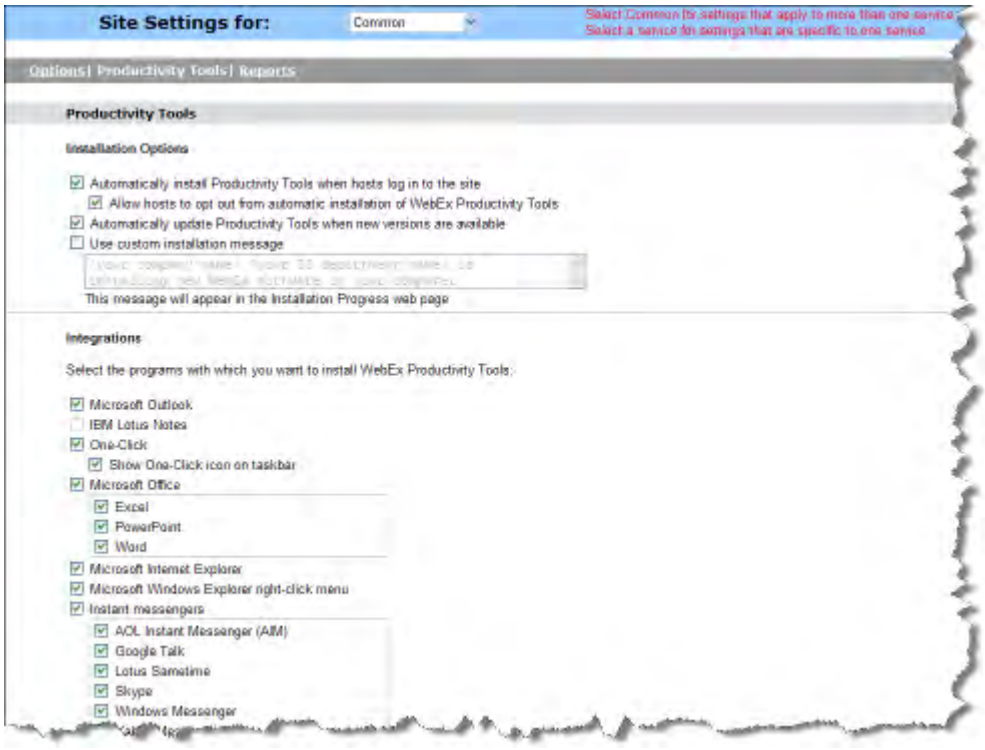
Configuring site settings for Productivity Tools

The Productivity Tools link is on the Site Settings page of Site Admin. Here you can:

- Select which Productivity Tools to install
- Create and use a customized install message
- Allow the meeting host to use templates for meetings
- Use One-Click to give host privileges

Productivity Tool settings

From the Productivity Tools link in Site Settings, you can configure Installation Options, Integrations, Productivity Tools Awareness Tips, One-Click, IM Integrations, and Templates.



Installation options

You will have three options:

- Automatically install PT when hosts log in to the site.
- Automatically update Productivity Tools when new versions are available.
- Use customized install message. Whatever message you type into the text box appears on the Installation Progress Web page.

Integrations

You can enable integration of Productivity Tools with the following programs and systems:

- Microsoft Outlook
- IBM Lotus Notes
- One-Click
- Microsoft Office integration
- Microsoft Internet Explorer
- Microsoft Windows Explorer right-click menu
- The following Instant Messengers:
  - ☐ AOL Instant Messenger (AIM)
  - ☐ Google Talk
  - ☐ Lotus Sametime
  - ☐ Skype
  - ☐ Windows Messenger
  - ☐ Yahoo Messenger
- Mozilla Firefox
- Cisco IP Phone. For more information, see *Enabling Cisco IP Phone Integration with Productivity Tools* (on page 36).
- PCNow Integration

Enabling Cisco IP Phone integration with Productivity Tools

When you enable Cisco IP Phone integration with Productivity Tools, you can start and join Cisco WebEx meetings directly from a Cisco IP Phone.

To enable Cisco IP Phone Integration with Productivity Tools:

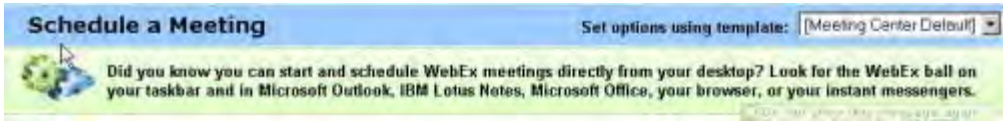
1. On the left navigation bar, under **Manage Site**, click **Site Settings.**
2. On the bar under Site Settings for, select **Productivity Tools**.
3. Scroll down if required and select**Cisco IP Phone** under **Integrations**.

Note: The **Cisco IP Phone** option will appear in Site Administration only if the Super Admin has enabled it.

Productivity Tools awareness tips

You can choose to display tips throughout the different WebEx Productivity Tools pages as well as service center pages. Default messages are presented for various services. You can create a message, revert to the default message, and even include a link in your message.

When you are at a specific site, for example, Meeting Center, you will then see the tip displayed at the top:



One-Click

You can change settings for the following:

- allow users to join unlisted meetings
- require hosts to approve users that uses One-Click to join meetings without passwords
- verify and set tracking codes

Templates

This setting allows a host to use templates when scheduling meetings with WebEx Productivity Tools.

2

Managing Users

If you want to…	See…
learn about managing user accounts	*About user accounts* (on page 40)
allow users to request accounts	*Allowing users to request accounts from the site* (on page 41)
process signup requests	*Processing signup requests* (on page 42)
create user accounts	*Adding new user accounts* (on page 43)
edit user accounts	*About editing user accounts* (on page 46)
add a contact to the company address book	*Adding a single contact* (on page 48)
activate and deactivate user accounts	*Activating and deactivating user accounts* (on page 48)
re-assign NBR recordings to another user	*Re-assigning NBR recordings* (on page 49)
delete NBR recordings from a deactivated account	*Deleting NBR recordings from an account* (on page 49)
set privileges for user accounts	*Setting user account privileges* (on page 50)
process password requests	*Processing password requests* (on page 53)
process service requests	*Processing service requests* (on page 54)
send an email message to all users	*Sending email messages to all users* (on page 54)
use tracking codes	*About using tracking codes* (on page 55)

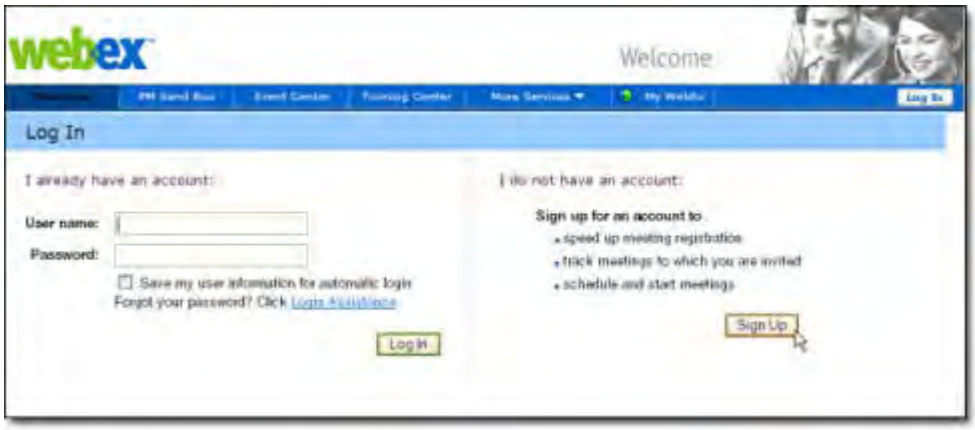
About user accounts

There are a few types of user accounts and each allows users to do different things:

User Account Type	Description
Host	Allows users to host WebEx sessions.
Site Administrator	Allows users to host sessions and use Site Administration.
Site Admin - view only	Allows users to view, but not change, information in Site Administration.
Attendee only	Allows users to log into your WebEx to attend meetings, maintain a personal profile, and to view the meetings list. **Note** Attendees do not need attendee accounts to attend WebEx sessions unless the host requires that they have an account.

If your WebEx contract provides the concurrent license option, you can add any number of user accounts, but your contract limits the number of users who can simultaneously host or attend sessions. If you have questions about concurrent licenses, please contact your WebEx account manager.

If your organization has enabled the account signup option, users can request new accounts by completing an account signup form on your WebEx service site.



Note: If you enable the feature, users can request accounts from your WebEx site.

You can also add individual or multiple user accounts from Site Administration.

Allowing users to request accounts from the site

Use this procedure to display an account signup form on your site so that users can request attendee accounts. You can select options to:

- Require site administrator approval for all account requests (all requests are placed in a queue for you to accept or reject).
- Automatically accept or reject signup requests from certain Internet domains.

To specify account signup options:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. Scroll down to **Service Request Settings**, and click **Allow users to request additional services**.
3. If you want to have all requests automatically approved, click **Automatically approve all host account requests**.
4. To have requests placed in a queue for approval, click **Site admin will manually approve host account requests...** and then choose from the following options:

Option	Description

Approve requests from these email domains	Use this option to automatically accept requests from a domain. Enter the URL here in this format:
	`webex.com`
	You can use an asterisk to indicate that any characters can be substituted for a portion of the domain name:
	`*.webex.net`
	To specify multiple domains, separate each domain with commas (but no spaces).
	`webex.com,*.webex.net,webex.org`

Reject requests not from these email domains	Use this option to automatically reject requests that do not originate from a certain domain. Enter the domain from which you accept requests in this format: `webex.com`

Option	Description

	You can use an asterisk to indicate that any characters can be substituted for a portion of the domain name:
	`*.webex.net`
	To specify multiple domains, separate each domain with commas (but no spaces).
	`webex.com,*.webex.net,webex.org`

All site administrators	Select this option to have all requests that are automatically rejected sent to all site administrators for consideration.
Selected site administrators	Select this option to have all requests that are automatically rejected sent to a specific site administrators for consideration. Then enter the email address of that site administrator in the box.

5 At **Require for account signup**, select each type of information that users must provide to submit the account signup form.

6 Scroll to the page bottom and click **Update** to save your changes.

Processing signup requests

If your organization's WebEx service site includes the account signup feature, use this procedure to accept or reject account requests.

Note: When users request new accounts, it may take up to two days before the user is granted access to your site. If the user needs access immediately after you accept the signup request, edit the user's account, specify a password, and provide it to the new user. For more information about editing user accounts, see *About editing user accounts* (on page 46).

To accept or reject signup requests:

1 On Site Administration Home page, click the new account request link.

This link appears only if one or more users have requested a user account on your site.

2 To accept one or more signup requests, select the check box for each signup request that you want to accept, then click **Accept**.

3 To reject one or more signup requests, select the check box for each signup request that you want to reject, then click **Reject**.

Site Administration sends an email message to the person who requested an account, indicating that if the request was accepted or rejected.

Adding new user accounts

Use this procedure to create new individual user accounts in Site Administration. To create multiple accounts simultaneously, see *Adding multiple user accounts* (on page 59).

To create a new user account in Site Administration:

1. On the navigation bar, under **Manage Users**, click **Add User**.
2. At **Account type**, select the type of account you want to create. Choose from:

User Account Type	Description
Host	Allows users to host WebEx sessions.
Site Administrator	Allows users to host sessions and use Site Administration.
Site Admin - view only	Allows users to view, but not change, information in Site Administration.
Attendee only	Allows users to log into your WebEx to attend meetings, maintain a personal profile, and to view the meetings list. **Note** Attendees do not need attendee accounts to attend WebEx sessions unless the host requires that they have an account.

3. In the **Account Information** section, enter the user's name and email information.
4. Create a password that conforms to any password criteria settings for the site and enter it at **Password** and **Confirm password**.
5. At **Language** and **Time Zone,** select a default language and time zone for the user.
6. In the **Privileges** section, select the privileges you want to enable for the user:

Privilege	Description
Service	WebEx services such as Meeting Center, Sales Center, and so on.
Session Type Allowed	A predefined bundle of features and options. For more information about creating service types, see About session types.

Privilege	Description
Security	Set conditions for password reset and account lockout.
Recording Editor	Select this to allow users to edit WebEx session recordings.
Sales Center	If you enabled Sales Center for this user, indicate the user's role on the sales team and select the user's manager. If you are adding an account for a SME (Subject Matter Expert) also enter a description of the SME, select the relevant products, and optionally enter the SME's WebEx Connect screen name.
Meeting Center	If both the Cisco Unified MeetingPlace integration option and WebEx Node for MCS option are provisioned for your site, select **Allow external attendees** to provide this user with the option to invite attendees located on the public internet when scheduling a meeting. Not selecting this option would allow attendees only within the same internal network to join the meeting.
Training Center	If you enabled Training Center for this user and the Hands-on Lab options is enabled for your site, click **Hands-on Lab Admin** to make this user a lab administrator.
Event Center	If you enabled Event Center for this user, click **Optimize Bandwidth...** to optimize bandwidth for attendees in the same network.
Telephony privilege	Select the types of teleconference options you want the user to be able to select when scheduling sessions, including call-in and call-back teleconferencing, and Integrated VoIP.
Webcast	Select the type of webcast you want to enable, Basic and Site Administrator privilege.
My WebEx	Select each type of My WebEx page you want to enable for this user. Also enter the amount of file and recording storage, and additional computers you want to allocate to this user.
Remote Support	If you enabled Remote Support for this user, indicate: ▪ The default view and colors for this user's console. ▪ If you want the user's session to recording automatically. Choose from **Network-based recording** (NBR) or **Save recording at local computer** and specify a location.
Remote Access	If you enabled Remote Access for this user, indicate: ▪ The computers assigned to the user. ▪ The default view and colors for this user's console. ▪ If you want the user's session to recording automatically. Choose from **Network-based recording** (NBR) or **Save recording at local computer** and specify a location.

Privilege	Description
System Management	Enable System Management, view and edit profiles.
Service Desk	Enable Service Desk, view and edit roles.
WebACD Preferences	If you enabled WebACD for this user, indicate if the user is an agent, manager, or both. To service a Call-Me-Back queue, this user must have telephony privileges. To select queues to assign to the user, click **Select Queues**. ▪ An agent and the number of simultaneous sessions the agent can handle. ▪ An agent and if the agent can accept Remote Support and Sales Center inbound requests. ▪ An agent and if the agent can automatically assign all or specified Remote Support or Sales Center queues. ▪ A manager and which agents and queues the manager can monitor. ▪ A manager and if the manager can automatically assign all or specified Remote Support or Sales Center queues. ▪ A manager and if the manager can automatically assign all Remote Support or Sales Center agents.

7 In the **Contact Information** section, enter the numbers for office, cell, and alternate phone, and address information. Select the **Call-back** check box to enable call-back to each phone number. Select **Call-in authentication** to require call-in authentication for attendees.

8 Click **Add**.

Selecting Queues for WebACD

To select Queues for WebACD:

1 On the navigation bar, under **Manage Users**, click **Add User or Edit User List**.

2 Scroll down to **WebACD Preferences** and click **Select Queues**.

3 Check the box next to the name of the Queues you want to add, and click **Add**.

4 Click **Update** to update the user.

Edit User List page

How to access this page:

On the navigation bar, under **Manage Users**, click **Edit User List**. To edit multiple accounts at once, see *Adding multiple user accounts* (on page 59).

What you can do on this page:

- View information about a user account
- Deactivate or activate a user account
- Specify types of meetings or sessions the user can host
- Access the Add User page

About editing user accounts

You can change some or all of the following user account information, depending on the type of account:

- First and Last name
- User name and password
- Email address
- Language—that is, the language in which text appears on your WebEx service site
- Meeting privileges—that is, the types of meetings that the user can host
- Host privileges—that is, whether the user can host meetings, use Site Administration, or only attend meetings
- My WebEx service—that is, the user account options that the user can access and use in the user's My WebEx area on your site, including an address book, file storage, user profile, list of scheduled meetings, reports, recording storage, Access Anywhere, and Personal Meetings page
- Telephony privileges—that is, the types of teleconferencing services a user can use when hosting a meeting or training session. For example, call-in, call-back, Integrated VoIP, and so on.

- WebEx Recording Editor privilege—that is, whether the user can download the WebEx Recording Editor to edit recordings made using WebEx Recorder
- Telephone numbers and Address information
- Whether the user account is active or inactive
- Webcast, My WebEx, Remote Support, Remote Access, System Management, Service Desk, and WebACD preferences

You can either edit user accounts one at a time, or edit multiple user accounts simultaneously, using import/export users process.

Editing single user accounts

Use this procedure to edit single user accounts. To edit multiple accounts at once, see *Adding multiple user accounts* (on page 59).

Important: For Cisco Unified MeetingPlace users, if directory service integration is enabled for your site, do not update user accounts. Please follow all instructions that were provided for your implementation.

To edit single user accounts:

1. On the navigation bar, under **Manage Users**, click **Edit User List**.
2. Locate the user account in the list or use one of the following methods to find it:
   - Enter the user's user name or email address, then click **Search**.
   - In the Index, click the letter that corresponds to the first character in the user's user name.
   - Filter the list by selecting an option from the **View** drop-down list.
   - Sort the list by selecting an option from the **Sort list by** drop-down list.
3. To activate or de-activate a user account, clear or check the **Active** check box next to the account, then click **Submit**.
4. To change the meeting types that a user can host, select or clear the check boxes next to the account in the Session Type column, then click **Submit**.
5. To edit user account details, click the account name, then specify new account information, then click **Update** to save your changes.

Adding a single contact

Use this procedure to add a new contact to the company address book for your WebEx service site. To add multiple contacts at once, see *Importing contacts from Microsoft Outlook or Exchange* (on page 62).

Note: If you have imported a Microsoft Global Address List to the company address book for your organization's WebEx service site, and you want to maintain their synchronization, add contacts to the Microsoft Global Address List, and then re-import it to Site Administration.

To add an individual contact:

1. On the navigation bar, under **Manage Site**, click **Company Addresses**.
2. Click **Add Contact**. To add a distribution list, click **Add Distribution List**. To add multiple contacts, click **Import**.
3. Enter the contact's information.
4. Click **Add**.

Activating and deactivating user accounts

You can temporarily deactivate user accounts. While the account is deactivated, the user cannot host WebEx sessions. You can reactivate the user account at any time.

Note: You cannot remove a user account from your WebEx service site using Site Administration. However, you can change the information about the account, including the user name and password, and assign it to another user.

To deactivate a user account:

1. On the navigation bar, under **Manage Users**, click **Edit User List**.
2. Locate the user account in the list or use one of the following methods to find it:
   - Enter the user's user name or email address, then click **Search**.
   - In the Index, click the letter that corresponds to the first character in the user's user name.

- Filter the list by selecting an option from the **View** drop-down list.
- Sort the list by selecting an option from the **Sort list by** drop-down list.

3. To activate or de-activate a user account, clear or check the **Active** check box next to the account, then click **Submit**.
4. Click **Submit**.

Reassigning NBR recordings

You can reassign network-based recordings from one user account to another. This might be necessary when deactivating a user account that has important recordings.

To reassign NBR recordings from one user account to another:

1. On the navigation bar, under **Manage Users**, click **Edit User List**.
2. Locate the user account in the list or use one of the following methods to find it:
   - Enter the user's user name or email address, then click **Search**.
   - In the Index, click the letter that corresponds to the first character in the user's user name.
   - Filter the list by selecting an option from the **View** drop-down list.
   - Sort the list by selecting an option from the **Sort list by** drop-down list.
3. Scroll down to the **My WebEx** section.
4. Select **Re-assign NBR Recordings**.
5. On the **Re-assign NBR Recordings** page, select the user account that will receive the recordings and confirm the reassignment.
6. Click **Update**.

Deleting NBR recordings from an account

You can delete network-based recordings from a user account. This might be necessary when a user account will be deactivated and you no longer need the associated recordings.

To delete NBR recordings:

1. On the navigation bar, under **Manage Users**, click **Edit User List**.
2. Locate the user account in the list or use one of the following methods to find it:
   - Enter the user's user name or email address, then click **Search**.
   - In the Index, click the letter that corresponds to the first character in the user's user name.
   - Filter the list by selecting an option from the **View** drop-down list.
   - Sort the list by selecting an option from the **Sort list by** drop-down list.
3. Scroll down to the **My WebEx** section.
4. Select **Delete NBR Recordings**.
5. Confirm that you intend to delete the NBR recordings.
6. Click **Update**.

Setting user account privileges

You can set the privilege assignments for a user account at any time by specifying the following:

- The types of meetings a user can host on your WebEx service site. Meeting types determine which features a user can use on your site.
- Whether a user can use My WebEx Standard or My WebEx Pro features.
- The teleconferencing services a user can use during a meeting or training session.

You can change the privileges for either all user accounts simultaneously, or only specific user accounts. See these topics:

- *Setting privileges for individual accounts* (on page 50)
- *Setting privileges for all user accounts* (on page 53)

Setting privileges for individual accounts

Use this procedure to change privileges for an individual user. To change privileges for all users on your site, see *Setting privileges for all user accounts* (on page 53).

To set privileges for individual accounts:

1. On the navigation bar, under **Manage Users**, click **Edit User List**.
2. Locate the user account in the list or use one of the following methods to find it:
   - Enter the user's user name or email address, then click **Search**.
   - In the Index, click the letter that corresponds to the first character in the user's user name.
   - Filter the list by selecting an option from the **View** drop-down list.
   - Sort the list by selecting an option from the **Sort list by** drop-down list.
3. In the **Privileges** section, select the privileges you want to enable for the user:

Privilege	Description
Service	WebEx services such as Meeting Center, Sales Center, and so on.
Session Type Allowed	A pre-defined bundle of features and options. For more information about creating service types, see *About session types* (on page 145).
Security	Set conditions for password reset and account lockout.
Recording Editor	Select this to allow users to edit WebEx session recordings.
Meeting Center	If you enabled Meeting Center for this user and the Cisco Unified MeetingPlace integration option is enabled for your site, check **Allow external attendees** to provide this user with the option to invite attendees located on the public internet when scheduling a meeting. The user can choose not to check this option, which would allow attendees only within the same internal network to join the meeting.
Sales Center	If you enabled Sales Center for this user, indicate the user's role on the sales team and select the user's manager. If you are adding an account for a SME (Subject Matter Expert) also enter a description of the SME, select the relevant products, and optionally enter the SME's WebEx Connect screen name.
Training Center	If you enabled Training Center for this user and the Hands-on Lab option is enabled for your site, click **Hands-on Lab Admin** to make this user a lab administrator.
Event Center	If you enabled Event Center for this user, click **Optimize Bandwidth...** to optimize bandwidth for attendees in the same network.

Privilege	Description
Telephony privilege	Select the types of teleconference options you want the user to be able to select when scheduling sessions, including call-in and call-back teleconferencing, and Integrated VoIP.
Webcast	Select the type of webcast you want to enable, Basic and Site Administrator privilege.
My WebEx	Select each type of My WebEx page you want to enable for this user. Also enter the amount of file and recording storage, and additional computers you want to allocate to this user.
Remote Support	If you enabled Remote Support for this user, indicate: ▪ The default view and colors for this user's console. ▪ If you want the user's session to recording automatically. Choose from **Network-based recording** (NBR) or **Save recording at local computer** and specify a location.
Remote Access	If you enabled Remote Access for this user, indicate: ▪ The computers assigned to the user. ▪ The default view and colors for this user's console. ▪ If you want the user's session to recording automatically. Choose from **Network-based recording** (NBR) or **Save recording at local computer** and specify a location.
System Management	Enable System Management, view and edit profiles.
Service Desk	Enable Service Desk, view and edit roles.
WebACD Preferences	If you enabled WebACD for this user, indicate if the user is: ▪ An agent and the number of simultaneous sessions the agent can handle. ▪ An agent and if the agent can accept Remote Support and Sales Center inbound requests. ▪ An agent and if the agent can automatically assign all or specified Remote Support or Sales Center queues. ▪ A manager and which agents and queues the manager can monitor. ▪ A manager and if the manager can automatically assign all or specified Remote Support or Sales Center queues. ▪ A manager and if the manager can automatically assign all Remote Support or Sales Center agents.

4 Click **Update**.

Setting privileges for all user accounts

Use this procedure to change privileges for all users on your site. This batch process affects all user accounts on your web site. To change privileges for just one user, see *Setting privileges for individual accounts* (on page 50).

To set privileges for all user accounts at once:

1. On the navigation bar, under **Manage Users**, click **Edit Privileges**.
2. In the **Change meeting privileges for all users** section, select the privileges you want to enable or disable for all users.
3. In the **Change My WebEx privileges for all users** section, select the privileges you want to enable or disable for all users.
4. In the **Change teleconferencing privileges for all users** section, select the audio conferencing options that you want to enable for all users.
5. Click **Submit**.

Processing password requests

If users forget their passwords and you enabled the Login Assistance option, they can request them from the login page. Use this procedure to accept or reject password requests.

To accept or reject password requests:

1. On the Home page of your Site Administration Web site, click the **New password requests** link.

   This link appears only if one or more users have requested their passwords.
2. Check the box next to the request, then click **Accept** or **Reject**.

Tip: To view detailed information about a user requesting a password, click the user name.

For each password request, Site Administration sends an email message to the person who requested the password, indicating that the request status.

Processing service requests

For Enterprise Edition sites only

If you enabled the option to allow users to request additional services, use this procedure to accept or reject service requests.

To accept or reject service requests:

1. On the Home page of your Site Administration Web site, click the **New privileges requests** link.

   This link appears only if one or more users who have an account on your site have requested host privileges for an additional service.

2. In the **Service Requested** section, select the check box for each service requests that you want to handle.

3. Click **Accept** or **Reject**.

Site Administration sends an email message to the person who requested the service indicating if it was approved or rejected.

Sending email messages to all users

You can send an email message to all users who have accounts on your site. For example, if you have made a change to your WebEx service configuration, you can use this feature to quickly inform all users of the change.

To send an email message to all users:

1. On the navigation bar, under **Manage Users**, click **Send Email to All**. Your name and email address appears in the sender information section.

2. At **Bcc**, enter an email address that you want to send a copy of this message; the message recipients will not see this email address.

3. Enter a subject and the message.

4. Click **Send**.

Important: In your message to all users, do not include any variables that are in the email templates for your WebEx service.

About using tracking codes

Tracking codes are alphanumeric codes that identify categories of users on a WebEx service site, allowing you to analyze usage by various groups within an organization—for example, Department and Division. You can require users to provide tracking codes when signing up for an account, as part of their user profiles, or when scheduling a meeting or training session.

The tracking codes that users provide appear as part of the information about a user in usage reports, which you can obtain for your WebEx service site. You can then use the data in these reports for purposes such as cost accounting or other internal billing processes.

When specifying a tracking code, you can require that users do one or more of the following:

- Provide a code value in their user profiles.
- Provide a code value when scheduling a meeting or training session.
- Select a code value in a list of values that you specify. You can create a list of code values by either typing them in a list or importing them from a comma-separated value (CSV) file that you create.

Alternatively, you can specify code values in a user's profile when adding or editing a user account in Site Administration. Thus, users need not type or select codes values for their profiles or when scheduling a meeting or training session.

Specifying tracking codes

You can specify tracking codes that let you track usage of your WebEx service site. For example, you can specify the tracking codes Project, Division, and Department, and then require users to provide code values when scheduling a meeting or training session. Optionally, you can specify one or more code values that users can select for each label.

The tracking code labels, or group names, that you specify can appear on any of the following pages on your WebEx service site:

- **My Profile page:** A page that contains personal information about each user who has an account. A user can maintain personal information on this page.
- **Schedule a Meeting Wizard:** On Meeting Center and Sales Center sites, the pages on which users provide information when scheduling a meeting.
- **Schedule Training Session page:** On Training Center sites, the page on which users provide information when scheduling a training session.
- **Schedule an Event page:** On Event Center sites, the page on which users provide information when scheduling an event.

To specify tracking codes:

1. On the navigation bar, under **Manage Site**, click **Tracking Codes**.

   The Tracking Codes page appears.
2. In the **Tracking Code Group** box, type the label, or group name, for a tracking code.
3. In the **Host Profile** drop-down list, specify whether the tracking code is required for users' user profiles.
4. In the **Schedule Meeting** drop-down list, specify whether users must specify a tracking code value when scheduling a meeting.
5. In the **Input Mode** drop-down list, select an option for how users can provide a code value.
6. Optional. If you require users to select a tracking code from a list of values that you specify, instead of typing a value, do one of the following:
   - To create a list of code values by typing them, click **Add/Edit** to open the Tracking Codes List page. Then specify code values. The Tracking Code List page appears.
   - To create a list of code values by importing them from a CSV (comma-separated values) file that contains the code values, click **Batch Add**.
7. Optional. Specify additional tracking codes.
8. In the Schedule/start page to list, specify on which services you want the page to appear.
9. Once you have finished specifying the tracking codes, click **Update** to save your changes.

3

Importing and Exporting Users

If you want to…	See…
learn about the Batch Import/Export Users page	*Batch Import/Export Users Page* (on page 57)
import multiple users at one time	*Adding multiple user accounts* (on page 59)
edit multiple user accounts at one time	*Editing multiple user accounts* (on page 60)
view the status of your import or export	*Status of Your Import or Export* (on page 62)
add contacts to the company address book	*Adding contacts to the company address book* (on page 62)
import tracking code values	*Importing tracking code values* (on page 66)

Batch Import/Export Users Page

How to access this page:

To Import or Export multiple users, on the left navigation bar, under **Manage Users**, click **Import/Export Users.** Then select the **Import** or **Export** button to access the **Batch Import/Export Users** page.

What you can do on this page:

Add several user accounts to your WebEx service site simultaneously, using a spreadsheet file in CSV (comma-separated values) format.

Options on Batch Import/Export Users pages

Option	Description
Import	Once you have selected a .csv file, click this button to upload the file to Site Administration. Site Administration uses the information in the file to create user accounts.
Export	Click this button to begin exporting users from Site Administration. You will receive an email notification when the request is finished. See Status of Your Import or Export for more information on notifications.
Abort	Click this button to end an Import or Export job.
Example (Batch Import Users Page)	Click this button to view the topic CSV File Format for User Accounts, which contains detailed instructions for creating a CSV file that you can use to add several user accounts to your WebEx service site simultaneously.

Note: If you have imported a Microsoft Global Address List to the company address book for your organization's WebEx service site, and you want to maintain their synchronization, add contacts to the Microsoft Global Address List, and then re-import it to Site Administration.

Importing accounts for Cisco Unified MeetingPlace users

Your Cisco Unified MeetingPlace implementation may include a directory service integration. In this case, MeetingPlace users will be able to log in to your WebEx site with a single sign-on, beginning on a MeetingPlace site. No importing of user accounts is necessary for a directory service integration.

Important: If directory service integration is enabled for your site, do not create or update user accounts. Please follow all instructions that were provided for your implementation.

For sites without the directory service integration enabled, you can import MeetingPlace user accounts into your Cisco Unified MeetingPlace site. You can import user accounts once you have exported the MeetingPlace accounts into a text (.txt) or comma-separated values (.csv) file. To import user accounts, see *Adding multiple user accounts* (on page 59).

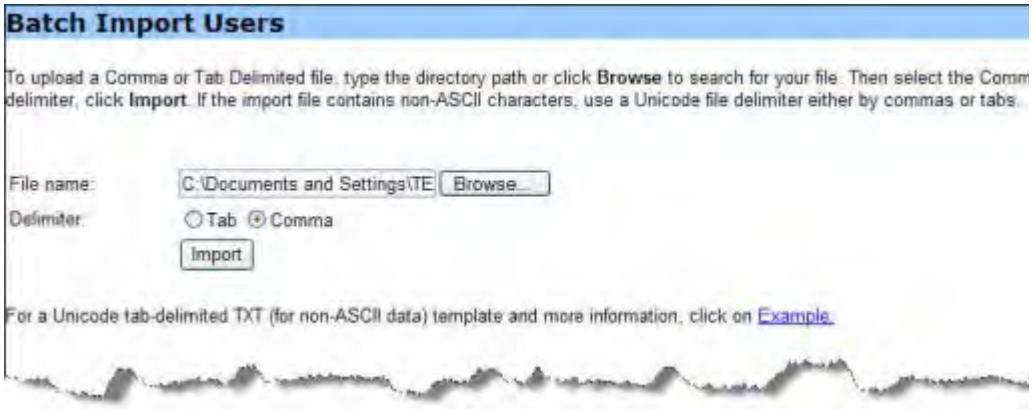
Adding multiple user accounts

You can use a batch process to add multiple user accounts. First use a spreadsheet program, such as Microsoft Excel, to create a CSV (comma-separated values) file that contains user account information and then use this procedure to import the information into WebEx. For Cisco Unified MeetingPlace users, you can also import a MeetingPlace-exported text (.txt) file.

Note: For details about creating a CSV file, see *CSV File Format for User Accounts* (on page 227).

To add multiple user accounts:

1. On the navigation bar, under **Manage Users**, click **Import/Export Users**.
2. Select the **Delimiter** as **Tab** or **Comma** for the format of the file you are importing.
3. Click **Import**. The Batch Import Users page appears.



4. Click **Browse**, select the CSV (.csv) file that contains user account information, then click **Open**.
5. Click **Import**.
6. Click **OK**.
7. You will receive an email notification when the request is finished. Click on the link in the notification email and carefully review and verify the information. See *Status of your Import or Export* (on page 62) for more information.

Note:

- If you specify any user accounts incorrectly, Site Administration cannot create those accounts. Site Administration generates a list of accounts that it was unable to create and cause for each error.
- If Site Administration reports errors, download the file to your computer, correct the errors, delete the last column, labeled **Comments**, and then upload the file again.
- After you upload the CSV file, you can change the information by editing the accounts in Site Administration. See About editing user accounts.

Editing multiple user accounts

You can import a CSV (comma separated values) with new account information to edit multiple user accounts simultaneously. During this process you will export the user account information to a CSV file, then use a spreadsheet program such as Microsoft Excel to edit the information, then import the information back into WebEx.

Note: For details about creating a CSV file, see *CSV File Format for User Accounts* (on page 227).

To edit multiple user accounts simultaneously:

1. On the navigation bar, under **Manage Users**, click **Import/Export Users**.
2. Click **Export**. The batch export request is received. Click **OK**. You will receive an email notification when the request is finished. See *Status of your Import or Export* (on page 62) for more information.
3. From the **Import/Export Users** page or from the email notification, select the link to download the exported CSV file and click **Save**.
4. Select a location to save the file, and then click **Save**.
5. Use a spreadsheet program, such as Microsoft Excel, to edit the file.
6. From the Site Administration **Import/Export Users** page, click **Import**.
7. Enter the name of the CSV file or click **Browse** to find the file.
8. Click **Import**.
9. Carefully review the information in the table to verify that you specified it correctly, and then click **OK**.

Note:

- If you specify any user accounts incorrectly, Site Administration cannot create those accounts. Site Administration generates a list of accounts that it was unable to create and cause for each error.
- If Site Administration reports errors, download the file to your computer, correct the errors, delete the last column, labeled **Comments**, and then upload the file again.
- After you upload the CSV file, you can change the information by editing the accounts in Site Administration. See About editing user accounts.
- If you create new users via the import process, you can use either "****" to generate a new random password or a valid password (as long as it meets password criteria and password options are configured on Site Settings). You cannot leave the password field blank. If you use "****", users are required to change the random password the first time they log in.

Status of your Import or Export

It can take a considerable amount of time to batch import or export. There is an Export and Import summary page that displays the status of the import or export. Batch jobs are placed in a queue and are run approximately every 5 minutes. The page is displayed after the export or import command has been selected and a file chosen. To refresh the status page, click the Import/Export Users link on the navigation bar. When an export job finishes, the status page displays a link to download the exported file. An e-mail is also sent to the person who requested the batch job when the job finishes. The message has several important pieces of information:

- A message that your export or import request is complete.
- A link to see the full results.
- A link to download the actual imported or exported CVS file, if it was successful.
- A link to view the error log, if any, for the job.

Adding contacts to the company address book

You can use Site Administration to maintain a list of your organization's contacts. WebEx session hosts can select names from the address book when inviting attendees to a meeting. To add contacts to the company address book you can:

- Add contacts individually in Site Administration (see *Adding a single contact* (on page 48)).
- Import contacts using Method 1 from Microsoft Outlook, a Microsoft Exchange server (see *Importing contacts from Microsoft Outlook or Exchange* (on page 62)).
- Import contacts using Method 2 from a CSV file (see *Importing contacts from a CSV file* (on page 63)).

Importing contacts from Microsoft Outlook or Exchange

You can use Method 1 to import contacts from Microsoft Outlook or Microsoft Exchange Server to the WebEx company address book.

To import contacts from Microsoft Outlook or Exchange:

1. On the navigation bar, under **Manage Site**, click **Company Addresses**. The Company Address Book page appears.

2. Click **Import**. The Batch Import Contacts page appears.

3. At **Method 1**, select the source of the address list that you want to import. The Outlook Address Book is imported (not the Outlook Contact List).
4. Click **Import**.
5. Click **OK**.

Importing contacts from a CSV file

You can use Method 2 to add multiple contacts to your organization's WebEx service from a CSV (comma separated values) file that contains contact information. For details about creating a properly formatted CSV file, see the topic *CSV File Format for Contacts* (on page 247). To add contacts one at a time, see *Adding a single contact* (on page 48).

To add multiple contacts simultaneously:

1. Under **Manage Site**, click **Company Addresses**.
2. Click **Import**. The Batch Import Contacts page appears.

3. Select the **Delimiter** as **Tab** or **Comma** for the format of the file you are importing.
4. Under **Method 2**, click **Browse**.
5. Select the CSV (.csv) file that contains user account information and then click **OK**.
6. Click **Import**.
7. Click **OK**.

Note:

- When importing a user, the user ID and the user's e-mail address must be unique. They can change but still must remain unique.
- If you specified any contacts incorrectly, Site Administration generates a list of records for the contacts that it was unable to create, including the cause for each error. You can download a file containing these records to your computer for reference or to correct the errors directly in that file.
- If you correct the errors directly in the file that Site Administration creates for you, delete the last column, labeled "Comments", before you upload the file again.

Editing contact information

Use this procedure to edit contact information in your company address book.

To edit contact information:

1. On the navigation bar, under **Manage Site**, click **Company Addresses**.

2. To locate the contact do one of the following:
   - In the Index, click the letter that corresponds to the first character of the contact's first name.
   - Enter all or part of the contact's first or last name in the **Name** box, and then click **Search**.
   - Enter all or part of the contact's email address in the **Email** box, and then click **Search**.
3. Click the contact's name.
4. Change the desired information.
5. Click **Update** to save your changes.

Deleting contact information

Use this procedure to delete a contact's information from your company address book.

To delete a contact's information from the global address book:

1. On the navigation bar, under **Manage Site**, click **Company Addresses**.
2. To locate the contact do one of the following:
   - In the Index, click the letter that corresponds to the first character of the contact's first name.
   - Enter all or part of the contact's first or last name in the **Name** box, and then click **Search**.
   - Enter all or part of the contact's email address in the **Email** box, and then click **Search**.
3. Select the check box next to any contact you want to delete.
4. Click **Delete**.

Using distribution lists

You cannot import a distribution list directly from Microsoft Outlook or Exchange, but you can add a distribution list to your company address book that contains a group of contacts. When hosts schedule sessions, they can send invitations to everyone in the distribution list, instead of addressing contacts one by one.

To add or edit a distribution list:

1. On the navigation bar, under **Manage Site**, click **Company Addresses**.
2. To add a new distribution list, click **Add Distribution List**. The Add Distribution List page appears.

3. To edit a distribution list, click the list and then select the contacts you want to add to the list.
4. Click **Add** or **Update**.

Importing tracking code values

If you specified tracking code labels, you can import tracking code values to the Tracking Codes List page, as an alternative to typing the values on the page. To use this process, you must first create a CSV (comma separated values) file that contains the tracking code values.

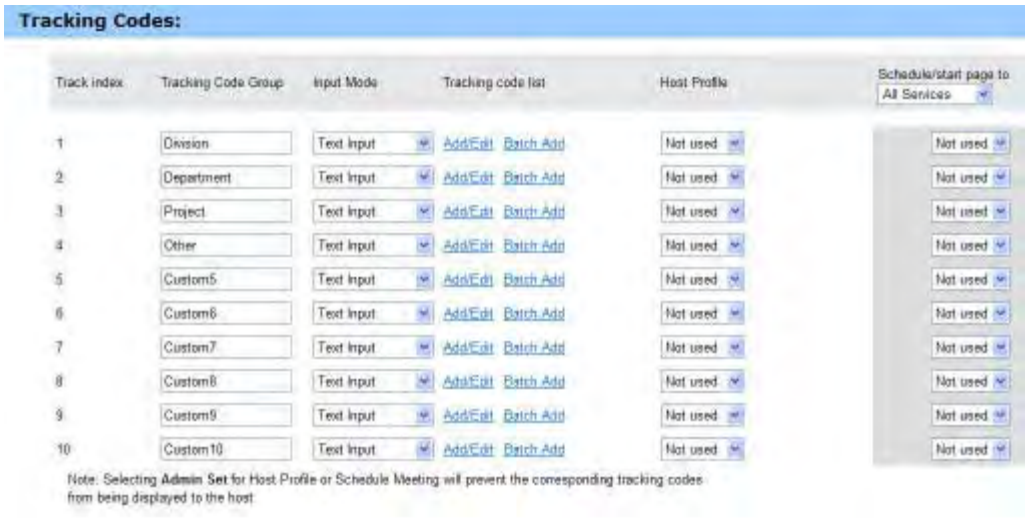
This option is useful if your organization uses many tracking codes and you want to maintain the list of values outside of Site Administration.

To import tracking code values:

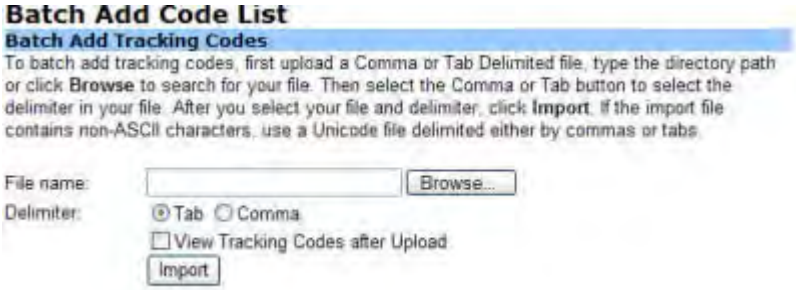
1 Use a spreadsheet program, such as Microsoft Excel, to create a CSV file that contains tracking code values.

Important: For details about creating a properly formatted CSV file for importing tracking codes values, see *CSV File Format for Tracking Code Values* (on page 250) .

2 Once you create a CSV file, do the following:



- On the navigation bar, under **Manage Site**, click **Tracking Codes**. The Tracking codes page appears.
- On the **Tracking codes** page, click **Batch Add** for the tracking code label that you specified. The Batch Add Code List page appears.



3. Click **Browse**, and then select the CSV file (.csv) that contains the tracking code values that you want to import to the Tracking Code List page.
4. Click **Open** to return to the Batch Add Code List page.
5. Optional. To automatically display the Tracking Codes List page once uploading is complete, select the **View tracking codes after update** check box.
6. Click **Import**.

   Site Administration uses the information in the file to create a list of code values on the Tracking Codes List page.
7. Optional. To require that users select a code value from a list, select the **Require from Code List** check box.
8. Click **Update**.

Note:

- If you specify any code values incorrectly, Site Administration cannot add those values to the list. In this case, Site Administration generates a list of records for the values that it was unable to add, including the cause for each error. You can download a file containing these records to your computer for reference or to correct the errors directly in that file.
- If you correct the errors directly in the file that Site Administration creates for you, ensure that you delete the last column, labeled **Comments**, before you upload the file to create the remaining code values.
- If, after uploading a CSV file, you want to change information that you specified for one or more code values, you can edit values individually on the Tracking Codes List page. Or, you can contact your WebEx account manager for assistance.

4

Managing Event Center

If you want to…	See…
change Event Center options	*Updating Event Center Site Settings* (on page 69)
manage standard scheduling templates for Event Center	*Managing Event Center scheduling templates* (on page 71)
reassign an event to a different host	*Reassigning an Event to a different host* (on page 73)
customize the default Enrollment form for Event Center	*Customizing the Event Center registration form* (on page 75)

Updating Event Center Site Settings

To specify Event Center options:

1. Under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Event Center**.
3. Specify options under **Site Options**.

Option	Description
Default host landing page	Specifies page to display to meeting hosts when meetings end. Choose from the following options: ▪ **Use WebEx branded default page:** To display the default WebEx page. To also display promotional content for free

Option	Description
	WebEx trials, click **Show promotional content**. ▪ **Use customized page:** Enter the URL of another page to display to hosts when meetings end. **Note** You do not need not enter "http://" in the URL.
Default Attendee landing page	Specifies page to display to meeting attendees when meetings end. Choose from the following options: ▪ **Use WebEx branded default page:** To display the default WebEx page. To also display promotional content for free WebEx trials, click **Show promotional content**. ▪ **Use customized page:** Enter the URL of another page to display to attendees when meetings end. **Note** You do not need not enter "http://" in the URL.
Join page	To display promotional content for free WebEx trials on the page that hosts and attendees use to join meetings, click **Show promotional content**.
Invitation email	To display promotional content for free WebEx trials on invitation emails, click **Show promotional content**.
Recording access	To bypass the mini user info form for recording access, click **Bypass the mini user info form**.
iCalendar	Specifies if you want to receive Microsoft Outlook Meeting Accepted, Tentative, and Declined emails from attendees.
Join event options	▪ **Attendees can join using Flash**...Specifies if you want to allow attendees to join using Flash technology to join a meeting. ▪ Select if you want Flash to be tried **First** or **Last**.
In-event options	▪ **Automatically record**...Specifies if you want to automatically record all sessions using Network Based Recording (NBR). ▪ **Send notification email**...Specifies if you want an email sent to the host when the event recording is ready. ▪ **Enable attention tracking**—Specify if you want to enable the attention tracking functionality for meetings. **Note** The **Automatically record** feature will only be available if the recording option is provisioned on your site.
Default Options	Select the Default Page for users to view. Options are applied to the site as defaults, but individual users can change them.

4 Click **Update Site Settings**.

Managing Event Center scheduling templates

If you want to…	See…
get an overview of scheduling templates	*About managing Event Center scheduling templates* (on page 71)
make an Event Center scheduling template available or unavailable to hosts	*Showing or hiding Event Center scheduling templates* (on page 72)
set the default Event Center scheduling template	*Setting the default Event Center scheduling template* (on page 72)
delete Event Center scheduling templates	*Deleting Event Center scheduling templates* (on page 73)

About managing Event Center scheduling templates

A scheduling template defines many of the settings for a scheduled event. If hosts often use the same settings for their events, you can save those settings in a template. When scheduling events, a host can select the template to avoid having to set many of the same options for each event.

There are two types of scheduling templates:

- **Standard scheduling templates:** Available for all hosts. Your WebEx service includes a set of standard templates. You can also make hosts' personal templates available as standard templates.
- **Personal scheduling templates:** A template that a host sets up and that is available only for that host. A host can create a personal template from within the event scheduler, by using the **Save As Template** option. When saving a template, the host also has the option to save the template as a standard template, by selecting **Save As Standard Template**. The template then appears in the list of standard templates in Site Administration.

In the list of standard templates for your Event Center service, you can:

- Show or hide any standard template, including those templates that hosts create and save as a standard template.

- Make any standard template the default template for Event Center
- Delete a standard template from your WebEx site

Showing or hiding Event Center scheduling templates

You can show or hide any standard Event Center template. If you show a template, it appears in the list of available templates in the Event Center scheduler.

To show or hide an Event Center scheduling template:

1. Under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Event Center**.
3. Scroll down to **Standard Scheduling Templates**.
4. In the **Make Visible** column, do one of the following:
   - To show a template, select the check box for the template.
   - To hide a template, clear the check box for a template.
5. Click **Update Site Settings**.

Setting the default Event Center scheduling template

The default Event Center scheduling template is automatically selected when a host opens the Event Center scheduler.

To set the default Event Center scheduling template:

1. Under **Manage Site**, click **Site Settings**.
2. In the Site Settings for drop-down list, select **Event Center**.
3. Scroll down to **Standard Scheduling Templates**.
4. In the **Set as Default** column, select the template that you want to make the default template.
5. Click **Update Site Settings**.

Deleting Event Center scheduling templates

You can delete an Event Center scheduling template, thus preventing it from appearing in the Event Center session scheduler.

Note: You cannot delete the Event Center Default template.

To delete Event Center scheduling template:

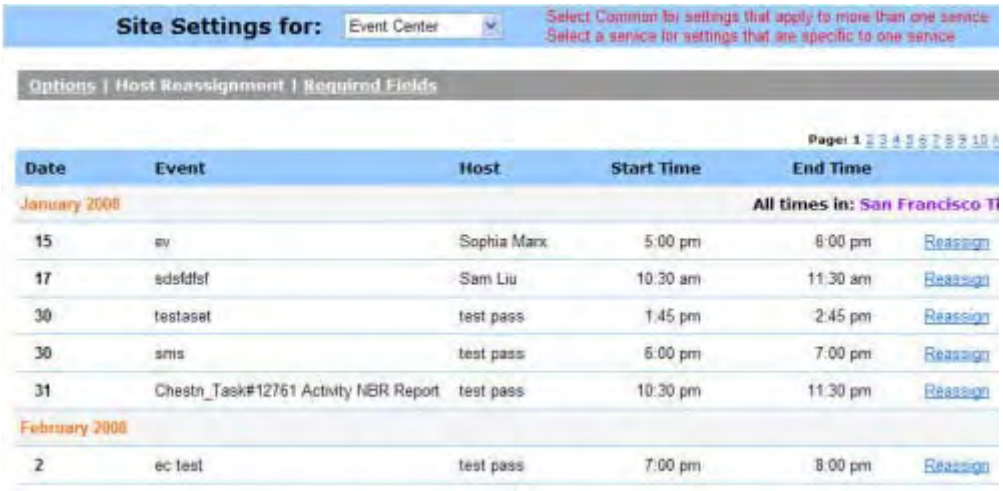
1. Under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Event Center**.
3. Scroll down to **Standard Scheduling Templates**.
4. Select the check box to the left side of the template that you want to delete.
5. Click **Delete Template(s)**.

Reassigning an Event to a different host

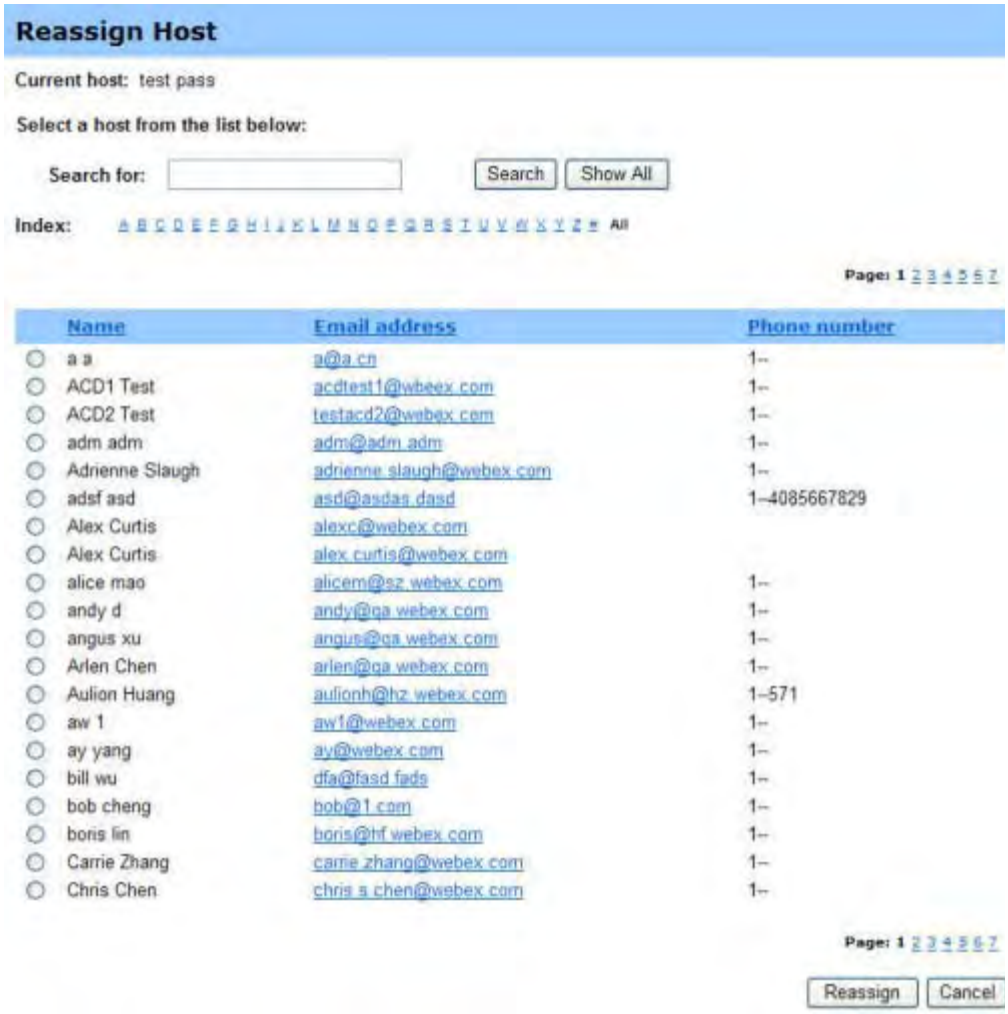
You can reassign an event to another Event Center host. The event is removed from the original host's My Meetings page, and then appears on the new host's My Meetings page. The new host can edit the event to change any information about it, including the password.

To reassign an event:

1. On the navigation bar, under **Manage Site**, click **Site Settings**
2. In the **Site Settings for** drop-down list, select **Event Center**, and then click the **Host Reassignment** link at the top. The Host Reassignment page appears.



3 In the list of events, click the **Reassign** link for the event that you want to reassign. The Reassign Host page appears.



4 Search for the new host in the list and select the new host.

5 Click **Reassign**.

Customizing the Event Center registration form

You can customize the registration form on which registrants provide information for a particular event. When customizing the form, you can choose which standard options you want to appear on the form and create any of the following custom options:

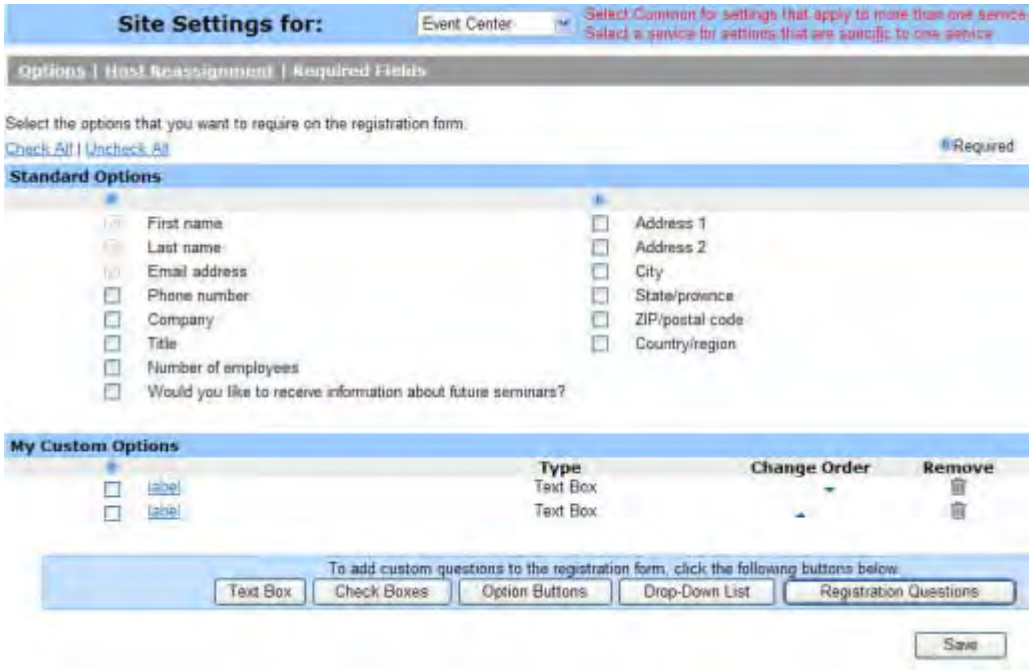
- Text boxes

- Check boxes
- Option buttons
- Drop-down lists
- Registration questions

Note: An event host can change the information that appears on the default enrollment form when scheduling an event on the Customize Registration Questions page.

To customize the default Registration form:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Event Center**, and then click the **Required Fields** link. The Required Fields page appears.



3 Under **Standard Options**, select each option that you want to require on the registration form.

4 Optional. Under **My Custom Options**, add custom options to the form by clicking any of the following:

- **Text Box**—Opens the Add Text Box page, on which you can specify text boxes that appear on the Enrollment form.

Option	Description
Text box label	Specifies the text that appears to the left of the text box. A text box label can contain a maximum of 256 characters.
Type	Specifies whether the text box contains a single line or multiple lines on which a customer can type. If you select **Multi-line**, specify the number of characters for **Width**, and the number of lines in the **Height** box.
Width	Specifies the width of the text box, in characters. The number that you specify determines how the text box appears on the form, but does not affect the number of characters that a customer can type in the text box. A text box can contain a maximum of 256 characters.
Height	Specifies the number of lines that the text box contains. To specify a number of lines, you must first select **Multi-line** under **Type**. If you do not specify a number of lines, Site Administration uses the default height, which is one line.
Save	Saves your changes to the form.
Close	Closes the window without saving your changes.

- **Check Boxes**—Opens the Add Check Boxes page, on which you can specify check boxes that appear on the Enrollment form.

Option	Description
Type	Specifies the type of the option that you are want to add or edit. By default, **Check Boxes** is selected. To specify another type, select it from the drop-down list.
Group label for check boxes	Specifies the text that appears to the left of a group of check boxes that you add to a form. To specify a group label, type it in the box. If you are adding only one check box and do not want a group label, leave this box blank.
Check box...	Specifies the text label that appears to the right of the check box, and whether the check box is selected or cleared by default on the form. To add a check box to the form, type its label in the box, and then choose **Cleared** or **Selected** from the corresponding drop-down list. **Note** Only those check boxes for which you specify a label appear on the form.
Add additional check boxes	To add check boxes, select an appropriate number from the drop-down list. **Note** You can add a maximum of 99 check boxes. Once you add 99 check boxes, the **Add additional check boxes** option is unavailable.

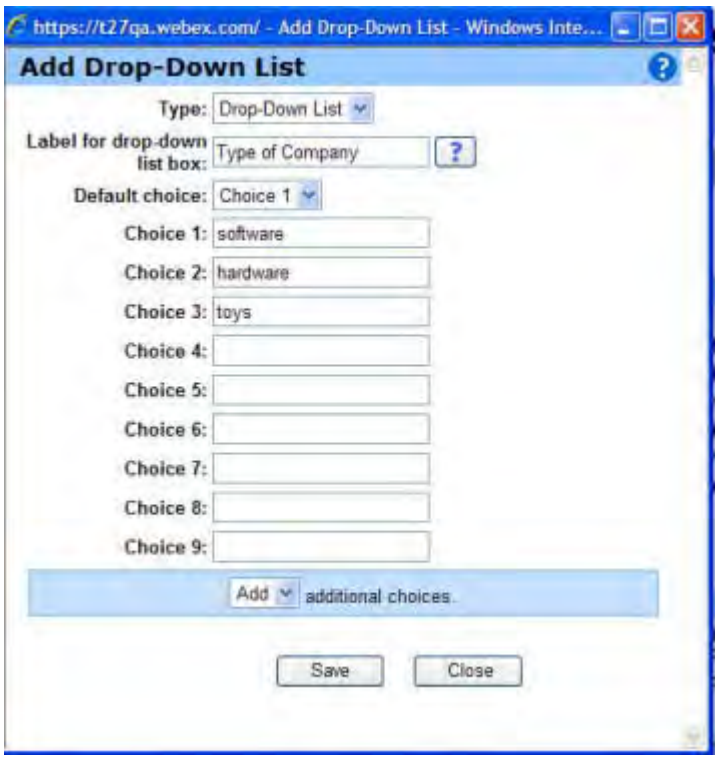
Option	Description
Save	Saves your changes to the Enrollment form.
Close	Closes the window without saving your changes.

- **Option Buttons**—Opens the Add Option Buttons page, on which you can specify option buttons that appear on the Enrollment form.

Option	Description
Type	Specifies the type of the option that you are want to add or edit. By default, **Option Buttons** is selected. To specify another type, select it from the drop-down list.
Group label for option buttons	Specifies the text that appears to the left of a group of option buttons that you add to the form. To specify a group label, type it in the box.
Default choice	Specifies which option button is selected by default on the form. To specify a default choice, first ensure that you have specified the labels for the option buttons, then select the number for the button in the drop-down list.
Choice...	Specifies the text label that appears to the right of the option button.

Option	Description
	To add an option button to the form, type its label in the box.
Add additional choices	To add option buttons, select an appropriate number from the drop-down list. **Note** You can add a maximum of 99 option buttons. Once you add 99 option buttons, the **Add additional choices** option is unavailable.
Save	Saves your changes to the Enrollment form.
Close	Closes the window without saving your changes.

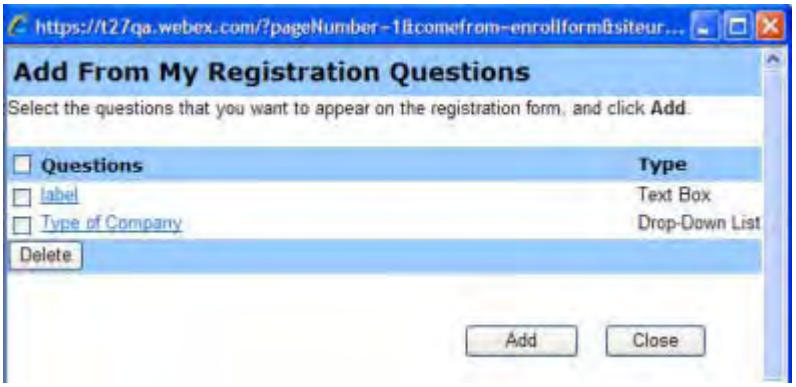
- **Drop-Down List**—Opens the Add Drop-Down List page, on which you can specify a drop-down list that appears on the Enrollment form.



Option	Description
Type	Specifies the type of the option that you are want to add or edit. By default, **Drop-Down List** is selected. To specify another type, select it from the drop-down list.
Group label for	Specifies the text that appears to the left of a group of drop-down list

Option	Description
drop-down list box	that you add to the form. To specify a label, type it in the box.
Default choice	Specifies the option that is selected by default in the drop-down list on the form. To specify a default choice, select it from the drop-down list.
Choice...	Specifies the text for each option that appears in the drop-down list. To specify the text, type it in the corresponding box.
Add additional choices	To add options to the drop-down list, select an appropriate number from the drop-down list. **Note** You can add a maximum of 99 option buttons. Once you add 99 option buttons, the Add additional choices option is unavailable.
Save	Saves your changes to the Enrollment form.
Close	Closes the window without saving your changes.

- **Registration Questions**—Opens the Add From My Registration Questions page, where you can select the questions that appear on the registration form.



Option	Description
Questions	Specifies the custom questions that you have created. Select the check box next to a saved question to add it to the default Enrollment form.
Type	Specifies the type of question: text box, check box, drop-down list, or option (radio) button.
(checkbox)	This check box specifies whether a question is selected for adding to the Enrollment form.

Option	Description
Add	Adds selected questions to the Enrollment form.
Close	Closes the window without adding selected questions to the Enrollment form.

5 Select the check box for the options you want to make required on the form. Use the up and down arrows under **Change Order** to change the order the fields options.

6 Click **Save**.

5

Configuring Meeting Center

If you want to…	See…
specify Meeting Center site options and default options	*Changing the end of meeting page* (on page 85)
enable iPhone integration with Meeting Center	*About Using Meeting Center on iPhone* (on page 87)
manage scheduling templates for Meeting Center	*Managing Meeting Center scheduling templates* (on page 88)
set meeting video options	*Maximum Video Bandwidth option* (on page 91)
enable high-quality video	*Enabling High-Quality Video for your site* (on page 91)
media monitoring	*Media Monitoring* (on page 92)

Changing the end of meeting page

You can specify the following Meeting Center options:

- The pages that meeting hosts and attendees see when the meeting ends
- The default page that appears when users access the Meeting Center service on your site

To specify Meeting Center options:

1. Under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **Meeting Center**.

3 Specify options under **Site Options**.

Option	Description
Default host landing page	Specifies page to display to meeting hosts when meetings end. Choose from the following options: ▪ **Use WebEx branded default page:** To display the default WebEx page. To also display promotional content for free WebEx trials, click **Show promotional content**. ▪ **Use customized page:** Enter the URL of another page to display to hosts when meetings end. **Note** You do not need not enter "http://" in the URL.
Default Attendee landing page	Specifies page to display to meeting attendees when meetings end. Choose from the following options: ▪ **Use WebEx branded default page:** To display the default WebEx page. To also display promotional content for free WebEx trials, click **Show promotional content**. ▪ **Use customized page:** Enter the URL of another page to display to attendees when meetings end. **Note** You do not need not enter "http://" in the URL.
Join page	To display promotional content for free WebEx trials on the page that hosts and attendees use to join meetings, click **Show promotional content**.
Invitation email	To display promotional content for free WebEx trials on invitation emails, click **Show promotional content**.
In-meeting Info tab	Specifies if you want to show "green" message, which says "Thank you for working green by meeting online".
Automatically record...	Specifies if you want to automatically record all sessions using Network Based Recording (NBR). **Note** This feature will only be available if the recording option is provisioned on your site.
Send notification email...	Specifies if you want to send a notification email to the host when the meeting recording is ready. This is not recommended when Automatically record all sessions option is turned on.
Enable Teleconference Keep-Alive	Specifies if you want to allow the teleconference to continue after the host ends the meeting.

Option	Description
iPhone WebEx application	Specifies whether you want to enable iPhone integration with Meeting Center. For more information, see *About Using Meeting Center on iPhone* (on page 87).
Default Setting	Enable or disable default value for Teleconference Keep-Alive setting.
Default page	Specifies the default page view that appears once a user accesses Meeting Center on your site. To specify the default page, select it in the drop-down list.

4 Click **Update Site Settings**.

About using Meeting Center on iPhone

You can use Meeting Center on Apple iPhone as you would use it on a computer to view, join, and end meetings. Using Meeting Center on iPhone does not require a Web browser. Instead, a WebEx Meeting client (or application) is installed on iPhone to provide most Meeting Center functionalities.

The following table provides a list of supported and unsupported Meeting Center functionalities on iPhone.

Supported Functionalities	Unsupported Functionalities
Starting scheduled meetings.	Scheduling a meeting directly from iPhone.
Joining meetings that are in progress.	Viewing videos.
Ending scheduled meetings.	Starting ad hoc meetings.
Ending meetings that are in progress.	Recording meetings directly from iPhone.
Using the chat (instant messaging) feature.	Starting Pay Per Use meetings.
Viewing shared items such as applications or the desktop of another attendee.	
Joining Pay Per Use meetings.	

Enabling iPhone integration with Meeting Center

The Site admin needs to enable the integration of the iPhone WebEx application with Meeting Center for Meeting Center to work on iPhone. When the integration is accomplished, every meeting invite email that an invitee receives contains the following information:

- Instructions to join the meeting using iPhone
- A link to join the meeting using iPhone.
- A link to download the iPhone WebEx application if the invitee has not installed it yet.

Additionally, you need to ensure that the following prerequisites are met before you try to enable the iPhone integration with Meeting Center.

- The Super admin has created the *iPhone Client* and *Mobile Web Access* session types.
- These session types are enabled by default for Meeting Center Pro and Standard meetings.

If these prerequisites are not met, the iPhone section will not be displayed in the invitee email.

To enable iPhone integration with Meeting Center:

1. Under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Meeting Center**.
3. Scroll down if required, and select **iPhone WebEx application** to enable the iPhone integration with Meeting Center.

Managing Meeting Center scheduling templates

If you want to…	See…
get an overview of scheduling templates	*About managing Meeting Center scheduling templates* (on page 89)
make a Meeting Center scheduling template available or unavailable to hosts	*Showing or hiding Meeting Center scheduling template* (on page 89)
set the default Meeting Center scheduling	*Setting the default Meeting Center scheduling*

If you want to…	See…
template	*template* (on page 90)
delete Meeting Center scheduling templates	*Deleting Meeting Center scheduling templates* (on page 90)

About managing Meeting Center scheduling templates

For Meeting Center sites only

A scheduling template defines many of the settings for a scheduled meeting. If hosts often use the same settings for their meetings, you can save those settings in a template. When scheduling meetings, a host can select the template to avoid having to set many of the same options for each meeting.

There are two types of scheduling templates:

- **Standard scheduling templates:** Available for all hosts. Your WebEx service includes a set of standard templates. You can also make hosts' personal templates available as standard templates.
- **Personal scheduling templates:** A template that a host sets up and that is available only for that host. A host can create a personal template from within the meeting scheduler, by using the **Save As Template** option. When saving a template, the host also has the option to save the template as a standard template, by selecting **Save As Standard Template**. The template then appears in the list of standard templates in Site Administration.

In the list of standard templates for your Meeting Center service, you can:

- Show or hide any standard template, including those templates that hosts create and save as a standard template.
- Make any standard template the default template for Meeting Center.
- Delete a standard template from your WebEx site.

Showing or hiding Meeting Center scheduling template

For Meeting Center sites only

You can show or hide any standard Meeting Center template. If you show a template, it appears in the list of available templates in the Meeting Center scheduler.

To show or hide an Meeting Center scheduling template:

1. Under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Meeting Center**.
3. Scroll down to **Standard Scheduling Templates**.
4. In the **Make Visible** column, do one of the following:
   - To show a template, select the check box for the template.
   - To hide a template, clear the check box for a template.
5. Click **Update Site Settings**.

Setting the default Meeting Center scheduling template

For Meeting Center sites only

The default Meeting Center scheduling template is automatically selected when a host opens the Meeting Center scheduler.

To set the default Meeting Center scheduling template:

1. Under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Meeting Center**.
3. Scroll down to **Standard Scheduling Templates**.
4. In the **Set as Default** column, select the template that you want to make the default template.
5. Click **Update Site Settings**.

Deleting Meeting Center scheduling templates

For Meeting Center sites only

You can delete an Meeting Center scheduling template, thus preventing it from appearing in the Meeting Center session scheduler.

To delete Meeting Center scheduling template:

1. Under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Meeting Center**.
3. Scroll down to **Standard Scheduling Templates**.
4. Select the check box to the left side of the template that you want to delete.
5. Click **Delete Template(s)**.

Note: You cannot delete the Meeting Center Default template.

Maximum Video Bandwidth option

For Meeting Center sites only

This option is available on the **Site Settings > Common > Site Options** page. The option Set maximum video bandwidth allows the site administrator to set the maximum video frame rate for video in-meeting. The default is 15 fps.

Enabling High-Quality Video for your site

Meeting Center and Training Center only

You can enable high-quality video for your site from two places in the **Site Settings > Common** page:

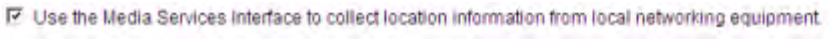
- To enable high-quality video for your site—In the **Site Options** section, under the **Set maximum video bandwidth to** option, check the **Enable high-quality video** check box.
- To enable high-quality video as an option when scheduling meetings or training sessions on your site—In the **Default Scheduler Options** section, under **Video options**, check both the **Video** and **Enable high-quality video** check boxes.

Note: High-quality video is an optional feature that must be turned on by a super administrator.

Media Monitoring

1. Select **Monitor WebEx media traffic** to enable Media Monitoring capabilities for site. The default is off.
2. Select **Use Mediatrace capabilities in Meeting Center** to enable Mediatrace capabilities. The default is off. The company's Mediatrace router credentials are required.
   - Enter the **Mediatrace Access** credentials as applicable.
3. Select **Use the Media Services Interface to collect location information from local networking equipment** to enable location reporting services. The default is off.

Note: Media Services Interface (MSI) must be installed on local computers for all features to work.



6

Setting Sales Center Options

If you want to…	See…
add or edit information about subject matter experts	*Adding information about subject matter experts* (on page 93)
add or edit product definitions for Sales Center, so you can associate them with specific users	*Adding or editing product definitions* (on page 94)
let members of the sales team to add portals to your site	*Allowing sales team members to set up sales portals* (on page 95)
let sales managers silently monitor sales meetings	*Allowing sales managers to monitor meetings* (on page 96)
to view in-bound meeting reports	*Viewing Sales Center reports* (on page 212)
to customize in-bound meeting branding	*Customizing in-bound meeting branding* (on page 97)

Adding information about subject matter experts

When you add sales team members, you will assign a role to each person such as Sales Representative, Team Manager, or Subject Matter Expert (SME). When you add a SME, you can also associate that person with a product and an AIM Pro or WebEx Connect screen name so that sales team members can search for SME's with specific knowledge.

For instructions on adding or editing sales team members see *About user accounts* (on page 40).

Adding or editing product definitions

Use this procedure to define products; later you can associate these products with with users who have subject-matter expertise about them.

To add a product definition for Sales Center:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Sales Center**.
3. Click the **Product Definition** link.

4. Do one of the following:
   - Click **Add Product** to add a product.

     The Product Definition Add Product page appears.

   - Click the **Edit** link for the existing product that you want to edit.

     The Product Definition Edit Product page appears.

5 In the **Name** box, type the name of the product.

6 In the **Description** box, type a description of the product.

7 On the Add Product page, click **Add**. On the Edit Product page, click **Submit**.

Tip: You can now add or edit a user's account to designate the user as a subject matter expert, and then associate the product with that user. See *About user accounts* (on page 40) for details.

Allowing sales team members to set up sales portals

Sales team members can set up portals to share meeting calendars, contact information and photos, and documents with prospects. Use this procedure to enable portals on your site.

To allow sales team members to add sales portals:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **Sales Center**.

3 Check the **Enable sales portal** box.

4 Click **Update Site Settings**.

Tip: For detailed instructions for setting up and managing portals, see the Sales Center User's Guide on the Support page of your WebEx service site.

Allowing sales managers to monitor meetings

Managers can monitor meetings that were scheduled by their sales team members by joining in "silent mode". The meeting participants will not know that the manager is present. During the meeting the manager can:

- Hear and see everything that occurs, however the manager's phone is muted so the manager cannot speak.
- Read chat messages and notes, but cannot send them.

To allow monitoring for sales managers:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Sales Center**.
3. Select the **Enable monitoring for Sales Managers** check box.
4. Click **Update Site Settings**.

Allowing sales team members to join meetings without logging in

Sales team members can join meetings without logging in. After joining the meeting, team members have full access to all meeting resources.

To allow team members to join meetings without logging in:

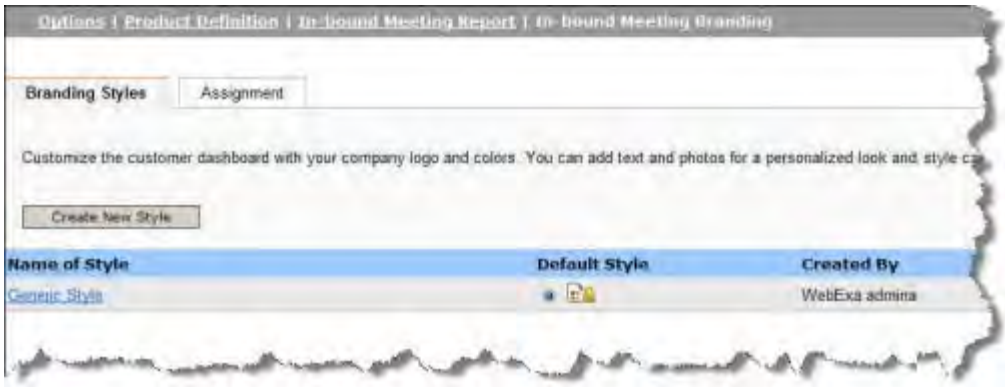
1. On the navigation bar under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Sales Center**.
3. Select the Site Options **Allow sales team members to join meetings without logging in** checkbox.
4. Click **Update Site Settings**.

Customizing in-bound meeting branding

The Site Administrator can customize in-bound meeting branding by updating the customer dashboard with company logo and colors. You can also add text and photos for a personalized look and feel.

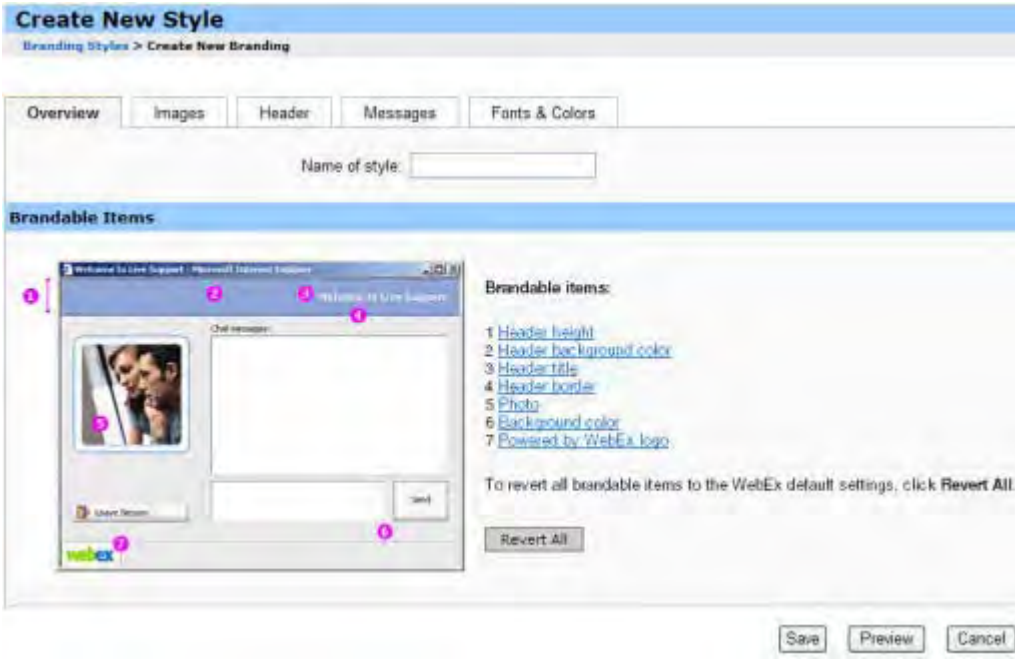
To allow team members to customize in-bound meeting branding:

1. On the navigation bar under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Sales Center**.
3. Click the **In-bound Meeting Branding** link.
4. To create new branding styles, click **Branding Styles**.



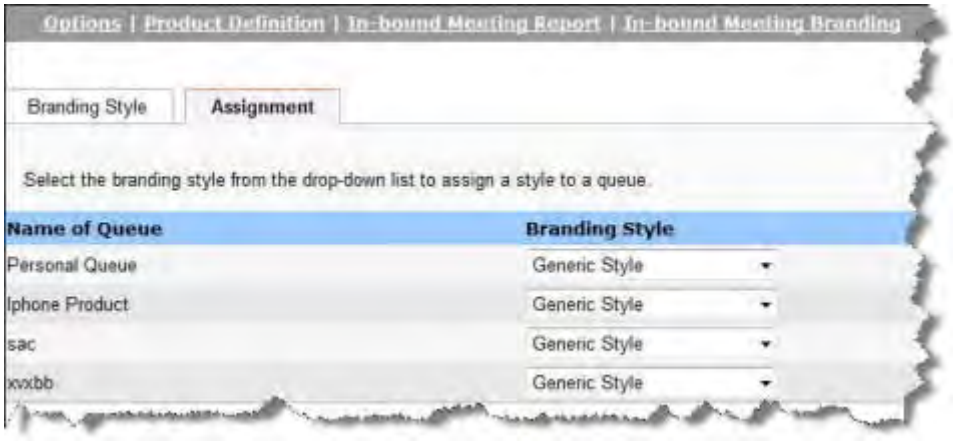
Note: All queues are automatically assigned to the default style, **Generic Style**. The default style cannot be deleted, unless you change it to no-default. You can set any style to default by selecting the **Default Style** button next to the style name.

5. Click on **Create New Styles** button.



6 Click on the tabs to change brandable items, images, headers, messages, and fonts, and colors. To revert all brandable items to WebEx default settings, click **Revert All.** To see what the new style will look like, click **Preview.** When you are finished making changes, click **Save.**

7 Click **Assignment** to select the branding style to assign to a queue.



8 Assign each queue a style from the Branding Style drop-down list. To see what the new style will look like, click **Preview.** When you are finished making changes, click **Save.**

Note: To more information on viewing reports for Remote Support, see *Viewing Sales Center reports* (on page 212).

7

Setting Remote Support Options

If you want to…	See…
download and run Remote Support client	*Setting Remote Support download options* (on page 101)
manage support sessions	*Managing support session forms* (on page 103)
configure the session window	*Customizing the Remote Support session window* (on page 107)
set options for CSR application sharing	*Specifying options for sharing CSR applications* (on page 111)
set time to make session inactive	*Automatically ending inactive sessions* (on page 113)
add information for support	*Customizing instructions for support representatives* (on page 114)

Setting Remote Support download options

To use Remote Support, your users need to download, install, and configure WebEx Support Manager. By default, it is automatically installed and updated when users access Remote Support, however, you can have users manually download and run the installer when it's required.

You can choose to have users use ActiveX or Java to download the Remote Support client. If you choose:

- Java—Remote Support runs in a standalone client.
- Active X—Remote Support runs in a Web browser, however, you can also allow users to download and use an Active X-based standalone client.
- Temporary Folder Solution (TFS)— Use this option if your company does not permit ActiveX and Java downloads

To specify which method to use to download the Remote Support client software:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** list, select **Remote Support**.
3. Select one of the following:
   - **ActiveX**
   - **Java client**
   - **Temporary Folder Solution (TFS)**
4. If you selected Active X and want to enable the standalone client, select **Standalone client**.
5. Click **Update**.

Allowing customers to choose agents

Use this procedure to allow customers to select from a list of available agents when they request a support session from your site.

To allow customers to select from a list of available agents:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** list, select **Remote Support**.
3. Select **Allow customers to join a session by selecting from a list of available agents**.
4. Indicate if you want agents to be listed by their first or full names.
5. Click **Update**.

Configuring the Video Feed for Remote Support

Agents can permit customers to send live video feeds during their chat sessions.

To configure the settings for sending a feed:

1. Sign in to the site administration tool.
2. Under Manage Site on the left navigation bar, select **Site Settings**.
3. Select **Remote Support** from the site settings drop-down menu.
4. Scroll down to the Customer Preferences section and select the **Allow customer to send webcam video feed**.

Managing support session forms

Before and/or after sessions, you can have Remote Support ask users to provide information. For example, you can use:

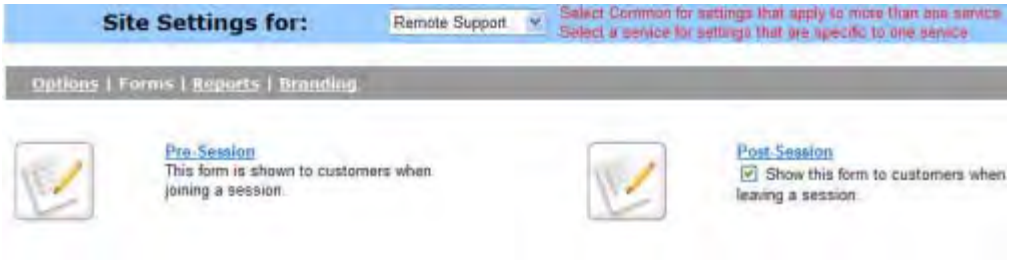
- Pre-session forms that customers can use before joining sessions to provide contact information or to ask questions.
- Post-session forms that customers can use when leaving sessions to provide comments about the service.

Customizing items on the pre and post-session forms

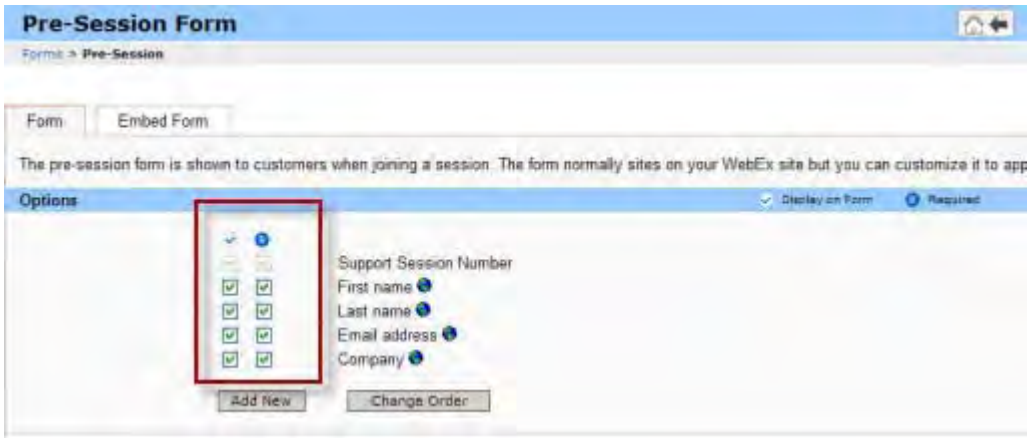
Use this procedure to customize pre and post-session forms.

To customize the pre and post-session forms:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** list, select **Remote Support**.
3. Click the **Forms** link. The Forms page appears.



4 Select the type of form you want to customize (**Pre-Session** or **Post-Session**).



5 Check the box in the first column for each item you want to appear on the form.

6 Check the box in the second column for each item you want to require that attendees complete on the form.

7 To add a new item to the form, click **Add New.**

8 To add a text box where users can enter information:

a) Click **Text box**.

b) To create a text box that is more than one line, click **Multi-line**.

c) At **Text box label**, enter the name that you want to appear next to the box.

d) At **Width**, enter the width of each line in the box.

e) Click **Save**.

9 To add a option box that users can use to select a single option:

a) Click **Check boxes**.

b) At **Group label**, enter any text that you want to appear before the options.

c) At **Check box...**, enter the name that you want to appear for each option that users can select.

d) If you want an option to appear selected, choose **Selected** from the list at the left.

e) Repeat steps c and d for each additional option you want to provide on the form. To add more options, click the **Add** drop-down list and select the number of options you want to add.

f) Click **Save**.

10 To add a check box that users can use to select one or more options:

a) Click **Options buttons**.

b) At **Group label**, enter any text that you want to appear before the options.

c) At **Choice...**, enter the name that you want to appear for each option that users can select.

d) If you want an option to appear selected, choose **Selected** from the list at the left.

e) To make one of the choices the default option, select which option from the **Default choice** drop down list.

f) Repeat steps c and d for each additional option you want to provide on the form. To add more options, click the **Add** drop-down list and select the number of options you want to add.

g) Click **Save**.

11 To add a drop-down list that hat users can use to select a single option:

a) Click **Drop-down list**.

b) At **Group label**, enter any text that you want to appear before the options.

c) At **Choice...**, enter the name that you want to appear for each option that users can select.

d) If you want an option to appear selected, choose **Selected** from the list at the left.

e) To make one of the choices the default option, select which option

from the **Default choice** drop down list.

f) Repeat steps c and d for each additional option you want to provide on the form. To add more options, click the **Add** drop-down list and select the number of options you want to add.

g) Click **Save**.

12 To change the order of the items on the list, from the form page:

a) Click **Change Order**.

b) Select the item you want to move and then use the up and down arrows to move it.

c) Click **Save**.

13 Click **Save** to save your changes.

Embedding the pre-session form

Use this procedure to generate HTML code that you can use to embed the pre-session form to your Web page or a button that links to it.

Note: You can choose from several types of buttons that users click to display the pre-session form.

To add the form or links to your Web page:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** list, select **Remote Support**.

3 Click on the **Forms** link.

4 Click **Pre-Session**.

5 Select the **Embed Form** tab.

6 Select one of the following:

- **Embed the form within any of your own web pages**—to generate the HTML code for the pre-session form
- **Embed a button linking to form on any of your own web pages**—to generate the HTML code for a link to the pre-session form

7 If you are creating a button, select the type of button that you want to create in the **Default Buttons** section.

8 Click the **Generate HTML** button to display the HTML code in the text box.

9 Click the **Preview** button to show the Pre-Session Form or your selected button.

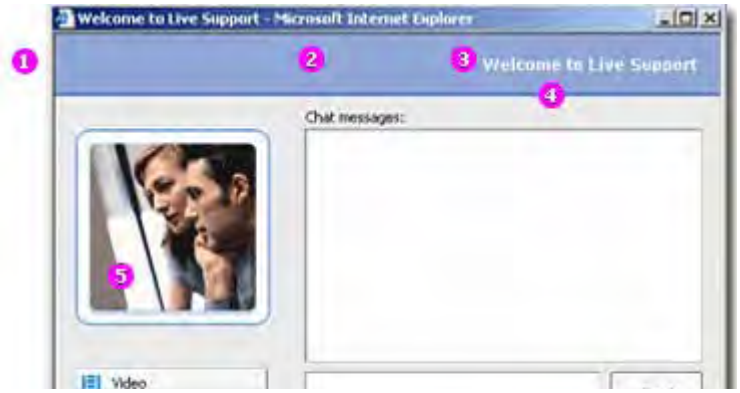
10 Select either the **Go Back** button or the **Forms** tab and then click **Save**.

Note:

- The pre-session form always includes a support session number that Remote Support automatically creates for each support session. You cannot remove this number from the form.
- The information that you obtain in a pre or post-session forms is stored in the support session's log. You can view the log and export the data into a file that you can open in a spreadsheet or database program.

Customizing the Remote Support session window

You can customize the Remote Support session window (dashboard) that customers use to enter messages. You can use change the forms to any colors, fonts, and graphics you desire, change the wording of status messages, or add a photo.



Powered by WebEx Logo

To create a branding style:

1. On the navigation bar, under Manage Site, click **Site Settings**.
2. In the Site Setting for drop-down list, select **Remote Support**.
3. Click **Branding**.

4. Click **Create New Style**.
5. Enter a name for this new style.

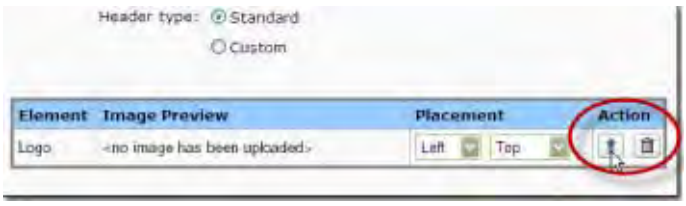
Note: You can enter up to 40 characters; do not use any of the following characters in the name:
% # ^ { } / \ * ? : | " @

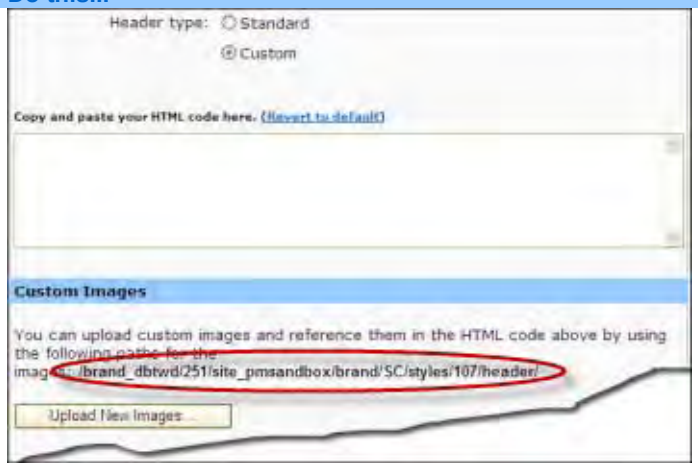
6. To change the images that appear on the window, click the **Images** tab and then:

To change...	Do this...
The WebEx logo	Check the box next to **Powered by WebEx logo.**
The CSR's photo	Check the box next to **Agent photo**. The photo that the CSR has saved in his or her My Profile page will appear when this option is selected.
A generic photo	Check the box next to **Generic photo**. The photo that the CSR has saved in his or her My Profile page will appear when this option is selected. To upload a different photo from your computer, in the **CSR Photo** section, click **Browse**, select one, then click **Upload File**. **Note** The photo you upload should be no longer than 130 x 130

To change...	Do this...
	pixels.

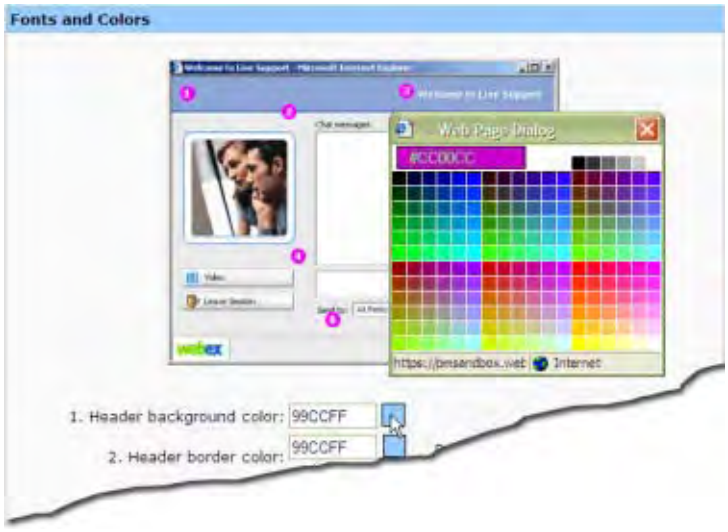
7 To change the header, click the **Header** tab, then:

To change...	Do this...
The header title	At **Header title,** enter the name (up to 50 characters) that you want to appear in the window header area. **Note** Do not use the following characters in the name: % # ^ { } / \ * ? : | " @ **Tip** To change the color of the text, see Step 9.
The header height	At **Header height,** enter the desired number of pixels.
The header type	At Header type, select **Standard** or **Custom**. If you select Custom, enter your HTML code in the box and click **Upload New Images** in the Custom Images box.
The header image	Select the **Upload** icon to upload an image. 
The header using your own HTML and images	At **Header type**, click **Custom**, then: 1) Enter the HTML code in the box. 2) Click **Upload New Images** to upload any images that are referenced in your HTML. **Note** In your HTML, format references to the images as indicated:

To change...	Do this...
	

8 To change the status messages that appear in the dashboard, click the **Messages** tab and change the text in the **Text Message** box.

9 To change the fonts and colors used, click the **Fonts & Colors** tab and:

To change...	Do this...
Header background color	At **Header background color,** enter the hex color value or click the color box and select one from the palette. 
Header border color	At **Header border color,** enter the hex color value or click the color box and select one from the palette.
Header border width	At **Border Width,** enter the width of the line that surrounds the header (enter "0" for no border).

To change...	Do this...
Header title color	At **Header title color**, enter the hex color value or click the color box and select one from the palette.
Header font	At **Font**, enter the HTML code to specify the default and alternative font, weight and size. For example: font-family: verdana; font-size: 12px; font-weight: bold; padding-right: 12px; padding-top: 12px;
Background color	At **Background color (dashboard)** and **Background color (web page)**, indicate the color to use for the dashboard and web page; enter a hex color value or click the color box and select one from the palette.
Text colors	At **Text color (dashboard)** and **Text color (web page)**, indicate the color to use for the dashboard and web page; enter a hex color value or click the color box and select one from the palette.

10 Click **Preview** to see the results.

11 Click **Save**.

Specifying options for sharing CSR applications

You can specify how a shared application or desktop appear during support sessions:

- Full-screen or standard window view
- Scales shared application or desktop to fit the window
- Whether a shared application or desktop appears in 256 colors or 16-bit color in the full-screen view or standard window in which it appears
- The default display mode, which determines the speed of software sharing and the quality of the images

You can override these options for individual support representatives by editing their user accounts.

To specify display options for software sharing:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** list, select **Remote Support**.

3 In the **CSR Preferences** section, click the **CSR Dash Customization** link.

4 To specify how shared applications appear, select one of the following:

Option	Description
Full screen - scale to fit	Display in full-screen view
Full screen	Use all available space to display shared application or desktops.
Window - scale to fit	Adjust to fit the window in its entirety.
Window	Specifies that a shared application or desktop appears in a window a support representative's or customer's screen, but that the size of the application or desktop is not adjusted to fit the window in its entirety.

5 To specify the quality of the color used to display shared applications, select one of the following:

Option	Description
256 colors	Specifies that a shared application or desktop appears in 256 colors in the viewer or the support representative's or customer's screen. This option requires less bandwidth for sharing applications or desktops than does the **High color** option, but. Thus, this option is useful if a customer is using a dial-up connection to attend a support session. **Note** If this option is selected, you must select the **Screen Sampling** display mode as the default mode for your site. A support representative can change the display mode during a support session, by clicking the **Session** tab on the CSR Dashboard, and then clicking **Session Options**.
High color (16-bit)	Specifies that a shared application or desktop appears in 16-bit color in the viewer or the support representative's or customer's screen. This option requires more bandwidth than the **256 color** option, but provides better imaging quality.

6 Click **Save**.

Automatically recording CSR sessions

Note: This feature will only be available if the recording option is provisioned on your site.

You can set up Remote Support to automatically record all support sessions on your site. When sessions end, Remote Support saves the recording to a location you specify and with the session number indicated in the file name: `SessionNumber.wrf`

Note: Note If you enable this option, CSRs cannot manually start the WebEx Recorder manually during support sessions.

To automatically record sessions:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings** for drop-down list, select **Remote Support**.
3. Under **CSR Preferences**, click the **CSR Dash Customization** link.
4. Check the **Enforce recording automatically when meeting starts** box to automatically begin recording when a meeting begins.
5. Select **Network-based recording** (NBR) or **Save recording at local computer**.
6. At **Location**, specify the location to save session recordings.
7. Click **Save**.

Automatically ending inactive sessions

If a support representative is inactive for a specified period of time during a session, Remote Support can automatically end the session. Before ending the session, Remote Support can warn the CSR that the session will automatically end unless the CSR asks that the session be continued.

To set inactivity alerts:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** list, select **Remote Support**.
3. In the **CSR Preferences** section, click **CSR Dash Customization**.
4. In the **Features** section**,** select **Alert the agent if the support session is idle for more than**, and then enter the number of minutes to wait before ending the session.
5. To have the session end if the CSR doesn't respond, select **Automatically end session if agent doesn't respond to alert after** and then enter the number of minutes to wait.

6 Click **Save**.

Customizing instructions for support representatives

Remote Support provides instructions that a support representative can follow to help a customer join a support session and to use support options. CSRs can access these instructions by clicking the **Instructions** link on the CSR Dashboard.

Use this procedure to change those instructions. For example, you might add information about your company's support policies, recommendations for maintaining security, or how to use specific support options.

Tip: You can prepare your plain text or HTML-formatted instructions in another application, then copy and paste them into the box on this page.

To customize instructions for support representatives:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** list, select **Remote Support**.

3 In the **CSR Preferences** section, click **CSR Dash Customization**.

4 In the **Instructions** section, select **Custom instructions**.

5 Select one of the following:

- **Plain text**—the instructions will not be formatted. You may enter up to 2000 characters.
- **HTML**—you can format the instructions to add numbered lists and bullets, align the text, add horizontal lines, backgrounds, and any formatting possible with HTML coding. You may enter up to 4000 characters.

Note: The default instructions include the variable %SessionID%, which Remote Support automatically replaces with the support session number. If you remove this variable from the message, users will have to enter the session ID before they can join a session. Therefore we recommend that you include this variable in your custom instructions.

6 Enter your instructions in the box.

7 Click **Save**.

8

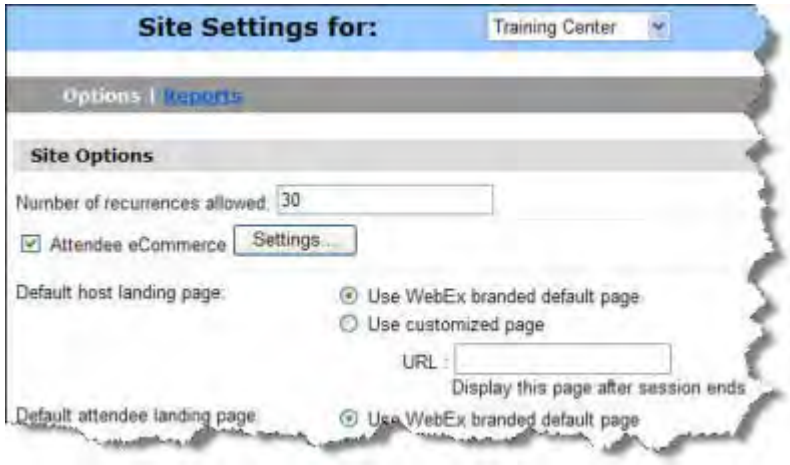
Setting Training Center Options

If you want to…	See…
use high-quality video	*Enabling High-Quality Video for your site* (on page 91)
set up eCommerce for Training Center	*Setting up Training Center eCommerce* (on page 117)
set up eCommerce online payment providers for Training Center	*Entering your online payment provider information* (on page 119)
set up coupons for eCommerce for Training Center	*Adding and deleting discount coupons* (on page 127)
Set default Training Center email options	*Setting the Training Center email options* (on page 131)

Setting up Training Center eCommerce

If your Training Center Web site has the attendee eCommerce option enabled, training session hosts can schedule sessions or publish recordings and then have attendees pay by credit card to access them.

Tip: If the Attendee eCommerce option is enabled for your site, you'll see eCommerce options in the Site Options section of your Training Center Site Settings page.



To set up the eCommerce option:

- Enter information about your credit card providers (see *Entering your online payment provider information* (on page 119))
  - For Verisign, see *Entering your PayPal Payflow Pro/Verisign payment information* (on page 119).
  - For PayPal Website Payments Pro (Canada), see *Entering your PayPal Website Payments Pro (Canada)* (on page 121).
  - For PayPal Payments Pro (US), see *Entering your PayPal Payments Pro (US) payment information* (on page 123).
  - For PayPal Payments Pro (UK), see *Entering your PayPal Payments Pro (UK) payment information* (on page 125).
- Change the eCommerce mode to "production." If you need to change options you can also use this feature to set the mode to "test" so that you can make sure your changes work as desired before you release them to your attendees (see *Switching between test and production modes* (on page 126))

Optionally you can:

- Create the discount coupons option to provide one-time or multiple discounts
- Customize the sales confirmation email message that attendees receive (see *Customizing your email templates* (on page 131))
- Customize the Credit Card page that attendees use to enter their credit card information (see *Customizing the Credit Card page* (on page 130))

Entering your online payment provider information

Use these procedures to enter your online payment provider information so that you can process credit card transactions from your Training Center site.

Important: Training Center supports the PayPal Payflow Pro/Verisign and PayPal Website Payments Pro (Canada, US, and UK) payment processing service. Before you perform this procedure you need the appropriate Verisign and PayPal configuration information.

To enter this in PayPal...	Go to…
Payflow Pro-Verisign payment information	*Entering your PayPal Payflow Pro/Verisign payment information* (on page 121)
Website payments Pro (Canada)	*Entering your PayPal Website Payments Pro (Canada)* (on page 121)
Pro (US) payment information	*Entering your PayPal Payments Pro (US) payment information* (on page 123)
Pro (UK) payment information	*Entering your PayPal Payments Pro (UK) payment information* (on page 125)

Entering your PayPal Payflow Pro/Verisign payment information

To enter your Verisign information:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Training Center**.
3. Click the **Settings** button next to **Attendee eCommerce**.
4. Under **General E-commerce parameter**s, click **Specify Providers**. You can choose from Verisign, PayPal Payflow Pro, PayPal Website Payments Pro (Canada), PayPal US and PayPal UK.
5. Select **Verisign** from the Provider list and enter the information as shown in *Configuration Items—PayPal Payflow Pro/Verisign* (on page 120).

6 Click **Update**.

Configuration Items—PayPal Payflow Pro/Verisign

Enter all provider information as described below and click **Update**.

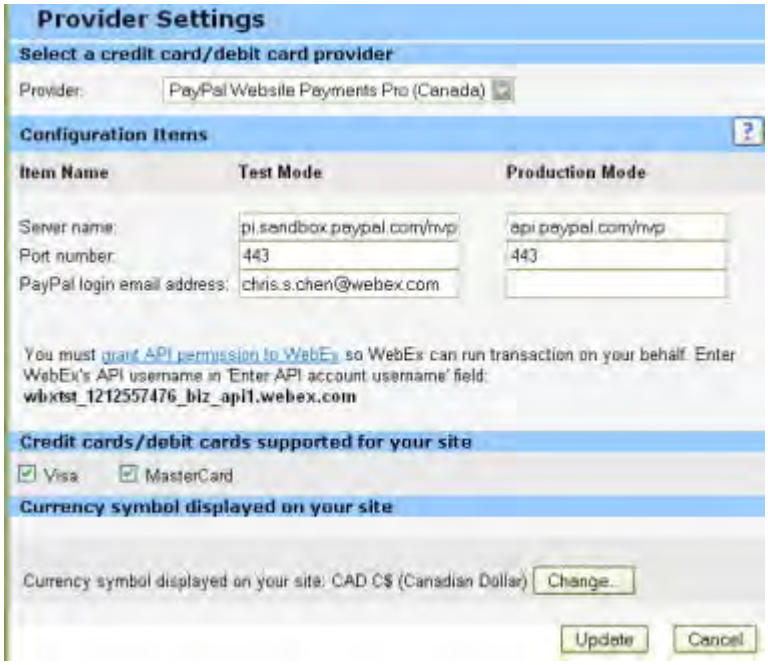
Field	Description
Server name	Enter the URL for your test and/or payment processing (production) server. For production mode, use the name that your online payment service provider provides. For test mode, enter "pilot-payflowpro.paypal.com."
Port number	Enter the port number that your site uses to establish a connection with the payment processing server. For production mode, use the number that your online payment service provider gives you. For test mode enter "443".
Partner ID	Enter the partner identification.
User ID	Enter the user identification number or name that your site uses to log in to the payment processing server.
Password	Enter the password that your site uses to log in to the payment processing server.

Field	Description
Partner ID	Enter the identification number or name for your online payment service. For production mode, use the ID your online payment service gives you.
Credit cards/debit cards...	Enter the supported credit and debit cards for your site.
Currency symbol...	The currency symbol displayed on your site. Verisign only supports USD $ (U.S. Dollar).

Entering your PayPal Website Payments Pro (Canada)

To enter your PayPal Website Payments Pro (Canada) information:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Training Center**.
3. Click the **Settings** button next to **Attendee eCommerce**.
4. Under **General E-commerce parameter**s, click **Specify Providers**. You can choose from Verisign, PayPal Payflow Pro, PayPal Website Payments Pro (Canada), PayPal US and PayPal UK.
5. Select **PayPal Website Payments Pro (Canada)** from the Provider list and enter the information as shown in *Configuration Items—PayPal Website Payments Pro (Canada)* (on page 122).



6 Click **Update**.

Configuration Items—PayPal Website Payments Pro (Canada)

Enter all provider information as described below and click **Update**.

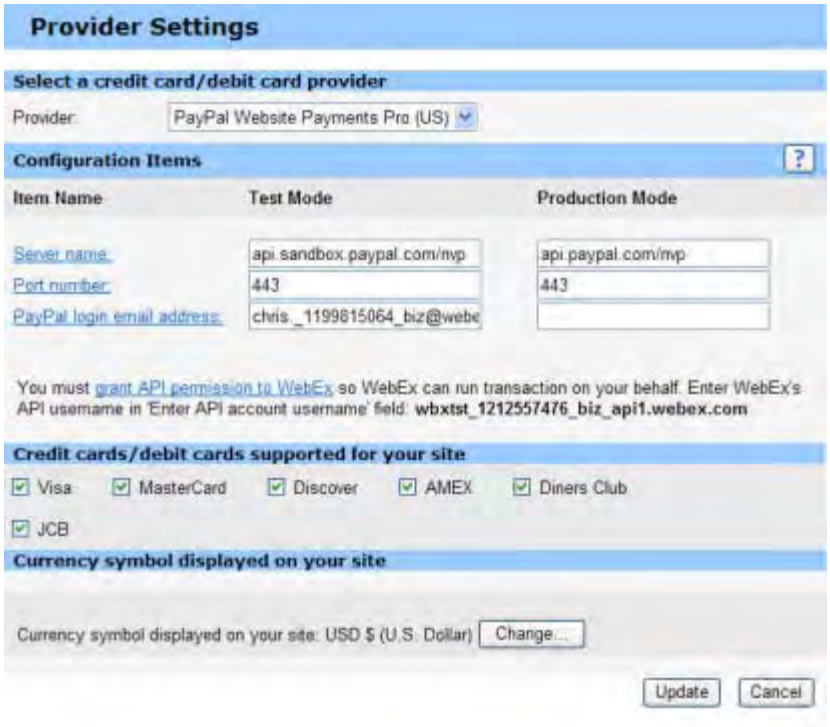
Field	Description
Server name	Enter the URL for your test and/or payment processing (production) server. For production mode, use the name that your online payment service provider provides. For test mode, enter "api.sandbox.paypal.com/nvp"
Port number	Enter the port number that your site uses to establish a connection with the payment processing server. For production mode, use the number that your online payment service provider gives you. For test mode enter "443".
Partner ID	Enter the partner identification.
User ID	Enter the user identification number or name that your site uses to log in to the payment processing server.
Password	Enter the password that your site uses to log in to the payment processing server.

Field	Description
Partner ID	Enter the identification number or name for your online payment service. For production mode, use the ID your online payment service gives you.
Credit cards/debit cards...	Enter the supported credit and debit cards for your site.
Currency symbol...	Click **Change** to change the currency symbol displayed on your site. PayPal Website Payments Pro (Canada) supports CAD C$ (Canadian Dollar) as the default currency.

Entering your PayPal Payments Pro (US) payment information

To enter your PayPal Payments Pro (US) information:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Training Center**.
3. Click the **Settings** button next to **Attendee eCommerce**.
4. In the **General E-commerce parameter** section, click **Specify Providers**. You can choose from Verisign, PayPal Payflow Pro, PayPal Website Payments Pro (Canada), PayPal US and PayPal UK.
5. Select **PayPal Website Payments Pro (US)** from the Provider list and enter the information as shown in *Configuration Items—PayPal Payments Pro (US)* (on page 124).



6 Click **Update**.

Configuration Items—PayPal Payments Pro (US)

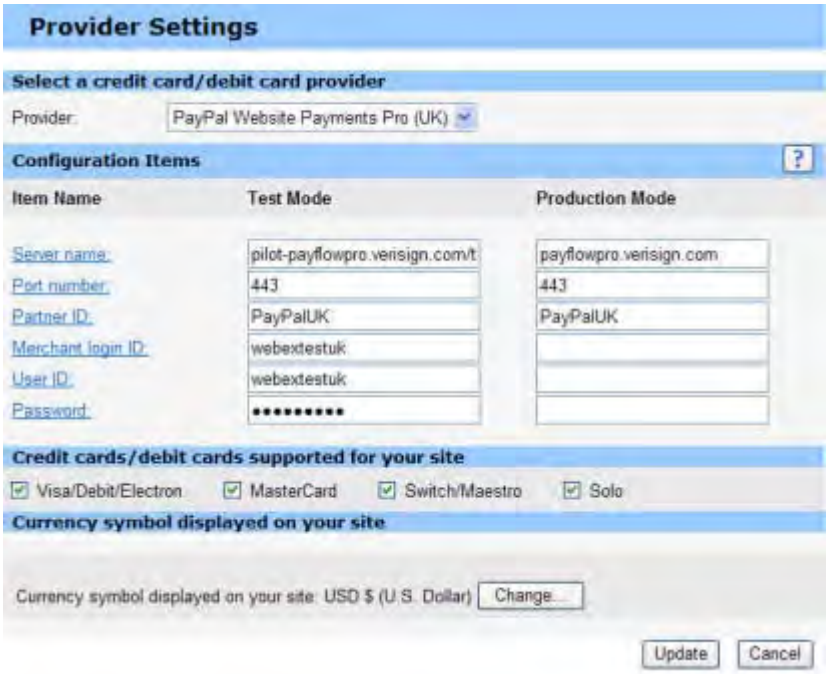
Enter all provider information as described below and click **Update**.

Field	Description
Server name	Enter the URL for your test and/or payment processing (production) server. For production mode, use the name that your online payment service provider provides. For test mode, enter "api.sandbox.paypal.com/nvp".
Port number	Enter the port number that your site uses to establish a connection with the payment processing server. For production mode, use the number that your online payment service provider gives you. For test mode enter "443".
PayPal login email address	Enter the email address to log in to the PayPal account.
Credit cards/debit cards...	Enter the supported credit and debit cards for your site.
Currency symbol...	Click **Change** to enter the currency symbol displayed on your site.

Entering your PayPal Payments Pro (UK) payment information

To enter your PayPal Payments Pro (UK) information:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Training Center**.
3. Click the **Settings** button next to **Attendee eCommerce**.
4. In the **General E-commerce parameter** section, click **Specify Providers**. You can choose from Verisign, PayPal Payflow Pro, PayPal Website Payments Pro (Canada), PayPal US and PayPal UK.
5. Select **PayPal Website Payments Pro (UK)** from the Provider list and enter the information as shown in *Configuration Items—PayPal Payments Pro (UK)* (on page 125).



6. Click **Update**.

Configuration Items—PayPal Payments Pro (UK)

Enter all provider information as described below and click **Update**.

Field	Description
Server name	Enter the URL for your test and/or payment processing (production) server. For production mode, use the name that your online payment service provider provides. For test mode, enter "pilot-payflowpro.paypal.com."
Port number	Enter the port number that your site uses to establish a connection with the payment processing server. For production mode, use the number that your online payment service provider gives you. For test mode enter "443".
Partner ID	Enter the identification number or name for your online payment service. For production mode, use the ID your online payment service gives you.
Merchant login ID	Enter the merchant login identification number or name that your site uses to log in to the payment processing server.
User ID	Enter the user identification number or name that your site uses to log in to the payment processing server.
Password	Enter the password that your site uses to log in to the payment processing server.
Credit cards/debit cards...	Enter the supported credit and debit cards for your site.
Currency symbol...	Click **Change** to enter the currency symbol displayed on your site.

Switching between test and production modes

While you are configuring the eCommerce option, you can enable the "test" mode so that you can test your changes without making actual transactions. When you are finished configuring the eCommerce options, you can change the mode to "production" so that users can make charges using the changes you tested.

To change eCommerce modes:

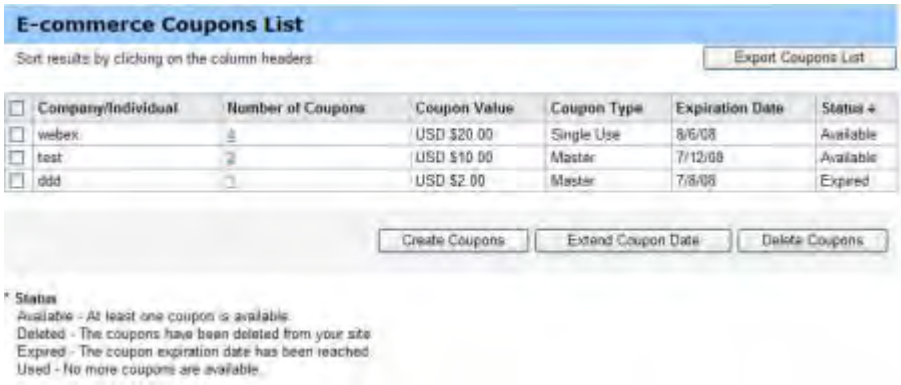
1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** list, select **Training Center**.
3. Next to **Attendee eCommerce, click Settings**.
4. At **Mode of operation**, choose **Production** or **Test**.
5. Click **Update**.

Adding and deleting discount coupons

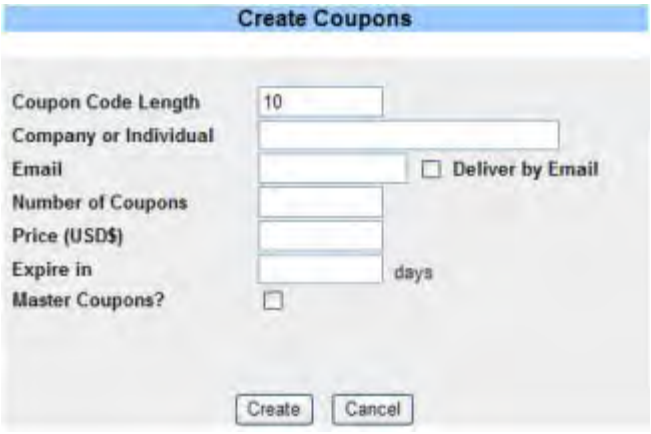
Use this procedure to set up discount coupons that attendees can use to receive one-time or multiple discounts.

To create discount coupons:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** list, select **Training Center**.
3. Next to **Attendee eCommerce,** click **Settings**.
4. In the **General E-commerce parameter** section, select the **Enable** or **Disable** coupons button.
5. To create a coupon, make sure coupons are enabled, and click the **Coupons** button.



6. To delete a coupon, check the box next to the name of the coupon and click **Delete Coupons**.
7. To create a new coupon click **Create Coupons**.



8 Enter the following information on the Create Coupons page.

Field	Description
Coupon Code Length	Enter the length of the coupon code.
Company or Individual	Enter the name of the company or person you want to send the coupon to.
Email	Enter the email address.
Number of Coupons	Enter the number of coupons.
Price (USD$)	Enter the amount to be discounted (in U.S. dollars).
Expire in...	Enter the number of days that the coupon is valid.
Master Coupons	To create master coupons, check **Master Coupons**.

9 Click **Create** and close the Create Coupons page.

Extending discount coupon dates

Use this procedure to set up discount coupons that attendees can use to receive one-time or multiple discounts.

To create discount coupons:

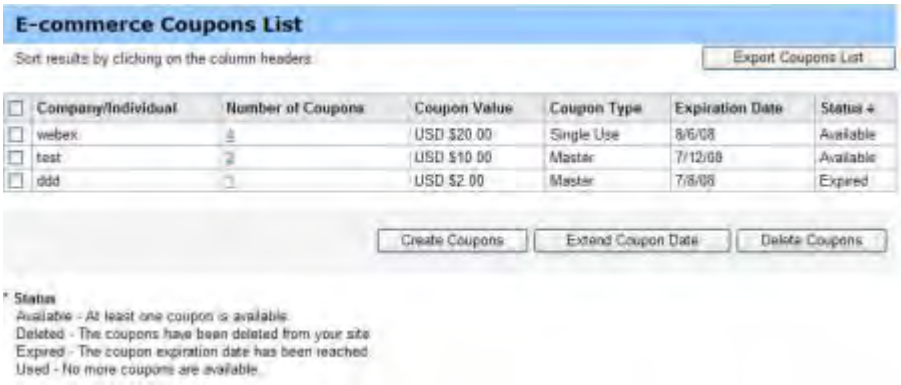
1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** list, select **Training Center**.

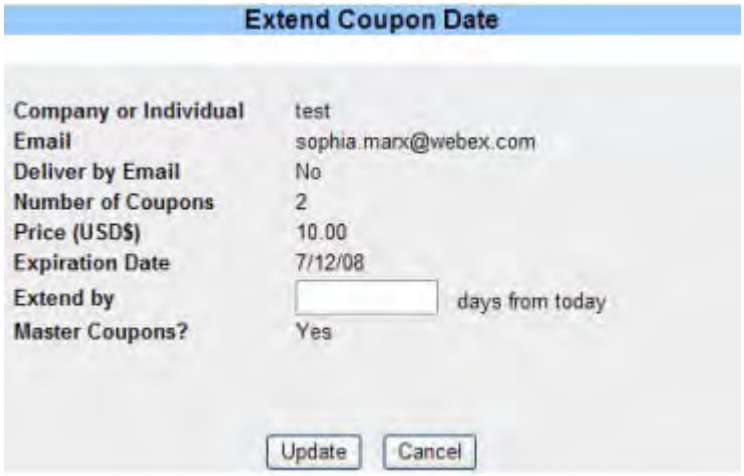
3 Next to **Attendee eCommerce,** click **Settings**.

4 In the **General E-commerce parameter** section, select the **Enable** or **Disable** coupons button.

5 To extend a coupon date, make sure coupons are enabled, and click the **Coupons** button.



6 Check the box next to the name of the coupon you want to extend and click **Extend Coupon Date**.



7 Enter the number of days from today's date that you want to extend the coupon.

8 Click **Update** and close the Extend Coupon Date page.

Entering your company information

Use this procedure to enter the name and support information you want to appear for your company in attendee eCommerce confirmation email messages.

To enter your company information

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** list, select **Training Center**.
3. Next to **Attendee eCommerce,** click **Settings**.
4. In the **General E-commerce parameter** section:
   - At **Merchant name** enter the name you want to appear for your company or organization.
   - At **Support info**, enter an email address or phone number you want attendees to use to get support with your online payment transactions.
5. Scroll to the bottom of the page and click **Update**.

Customizing the Credit Card page

If a host schedules a session or publishes a recording on your site and wants to charge attendees to access them, the Credit Card page appears so that attendees can provide their credit card information. You can change the page's header and footer text.

For example, you might want to put additional information or instructions in the header or your organization's terms and conditions in the footer.

To set up the Credit Card page:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Training Center**.
3. Next to **Attendee eCommerce,** click **Settings**.
4. In the **Customize Text for Attendee Payment Page** section, change or add text to the header (top) or footer (bottom) of the page.
5. Click **Update**.

Setting the Training Center email options

Training Center provides a variety of email messages to automatically send when certain events occur. You can enable or disable email messages or specify when the messages are sent.

Note: A training host can choose which email to send when they schedule sessions, thereby overriding your selections. Hosts can also customize the content these email messages. For more information, refer to Training Center online help or the Training Center User's Guide on the Support page of your Training Center site.

To specify Training Center email options:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Training Center**.
3. For **Default email options**, select the email messages you want to send.
4. To have WebEx send reminder email messages before sessions begin, under **Reminder**, indicate who (attendees, hosts, or both) and the amount of time before the session begins that you want messages sent.
5. Click **Update Site Settings**.

Customizing your email templates

Once an attendee makes an online payment to attend a training session or view a published recording on your site, the attendee receives a payment confirmation email message. You can use this procedure to change the following items in that message.

To set up the payment confirmation email message:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Training Center**.
3. Next to **Attendee eCommerce,** click **Settings**.
4. Click the link for the email you want to update and change any of the following:
   - The "from" email address
   - The message subject

- The email body text, you can change or delete the text and variables.

Caution Variables are placeholders that WebEx will later substitute for other information; variables appear as a word with a percent sign (%) before and after it (e.g. "%lastname%"). You can delete or more variables, but you can't change the variable name.

5 Scroll to the bottom of the page and click **Update**.

9

Managing Email Templates

If you want to…	See…
modify an email template	*Customizing email templates* (on page 133)
revert an email template to its default	*Restoring the default email template* (on page 134)

Customizing email templates

Your WebEx service automatically sends email messages, for example when hosts schedule or change sessions. If your site has the email templates option, you can change the templates that define those email messages. You can also revert any email template to its default state.

Note: For information about enabling the email templates option, contact your WebEx account manager.

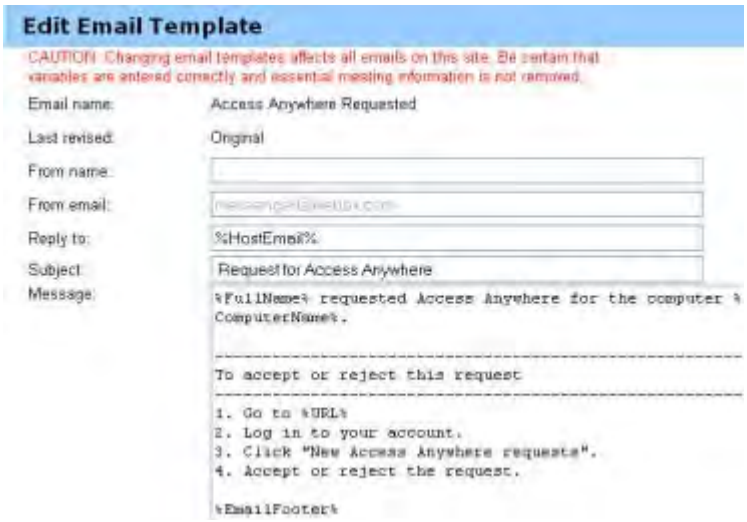
To customize an email template:

1. On the navigation bar, under **Manage Site**, click **Email Templates**.

   A list of available email templates appears.

2. If your WebEx site has multiple services, at **Existing Email Templates for**, select the service whose templates you want to customize.
3. Click the template you want to change.
4. Change the text and remove or rearrange variables, as needed.

Important: You can move variables, but do not change their names.



Variables appear with a percent (%) sign before and after their name.

5 Click **Update**.

Restoring the default email template

If you customized an email template, you can restore it to its original state.

To revert an email template to its default state:

1 On the navigation bar, under **Manage Site**, click **Email Templates**.

2 Check the box next to the template that you want to restore.

3 Click **Revert to Default** at the bottom of the page.

4 A message appears, allowing you to confirm that you want to revert template to its default state. Click **OK**.

10

Managing Site Security

If you want to…	See…
specify security options	*Setting security options* (on page 135)
specify strict password criteria	*Specifying SSO Configuration* (on page 140)
enable digital certificates	*Enabling digital certificates (PKI)* (on page 143)

Setting security options

Site Administration provides several methods for preventing unauthorized use of your WebEx service site. You can:

- Specify strict password criteria to make passwords more difficult to guess
- Require that meeting attendees provide passwords to prevent unauthorized access to WebEx sessions
- Review all requests for lost passwords
- Allow the use of Access Anywhere

To specify security options:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. To set other security options, under **Security Options**, select any of the following options:

Option	Description
Account management section	

Option	Description
Allow user to change user name	Select this to allow users to change user names by editing their user profiles. This option is unavailable if the Auto Login option is enabled for your site.
Allow user to change personal URL	Select this to allow users to change his or her default personal URL. For example, if a user's Personal URL is http://acme.webex.com/meet/joe_smith the user can go to the My Profile page and change the directory portion of the URL, e.g. "joe_smith ", to something else.
Lock out account after [N] failed attempts to log in	Select this and then specify the number of times a user can try to log in before they have to contact you for assistance. You can also choose to have site administrator notified when accounts are locked out.
Automatically unlock account after [N] minutes	Select this to automatically unlock accounts after the number of minutes you specify.
Deactivate account account after [N] days of inactivity	Select this to specify how many days an account can be inactive before it is deactivated. An account is "active" whenever a user logs on. The timer starts when the option is activated. **Important:** No communication is sent to the user from Site Admin informing them that their account has been made inactive!
Allow user to change password even if Auto Login APIs are on	Select this to allow users to change passwords, even if the Auto Login APIs are in use.
Manage user accounts through APIs	Select this to use URL or XML APIs to create or change user accounts.
Forgot password	Specify which options to display when a user fogets his or her password: ▪ Specify site administrators to receive user password requests. ▪ Select **Send email with the link to change the password** if you want an email to be sent that includes the password, and whether the requests need to be approved by a site administrator. Non-SSO sites will have the **Send email with the link to change the password** option selected by default. ▪ Select **Display brandable text** if you want to create your own email message about resetting the password. SSO sites will have this option selected by default. **Note**: If the **Manage user accounts through APIs** option is selected, only the **Display brandable text** option is available.
Account Signup section	

Option	Description
Confirmation required for new accounts	Select this to require confirmation for users to sign up for an account. Additionally, you can specify the number of days for which the confirmation link will be active. If the account is not activated within that period, the link will expire.
Notify all site administrators whenever a new account is created	Select this to notify all site administrators when a new user account is created.
Show security check in the signup form	Select this require new users to type the letters or digits of a distorted image that appears on the screen for added security.
Password management section	
Require strong passwords for new user accounts	Select this to require that all new and changed user passwords comply with the password criteria that you specify. For more information about strict password criteria, see *"Specifying strong password criteria"* (on page 140).
Allow user to save account password in cookies	Select this to allow users to save password information in browser cookies so that they don't have to enter passwords each time they use the same computer to log in.
Do not allow reuse of the last [N] passwords	Also know as the "cyclic passwords" option, select this to prevent users from selecting the same password until they select a specified number of unique passwords.
Do not include passwords in emails...	Select this option to exclude password information from the email message that users receive when they reset passwords. Instead, the email contains a link to an SSL-protected web page that contains the password. The next option allows the user to view the page only once.
Allow access to password page one time only	When the option above is selected, use this option to allow users to access the password page just once.
Password reset section	
Number of days before temporary password must be changed	Select this option to limit the number of days that temporary passwords are valid.
Password aging section	
Force all users to change password every [N] days	Select this to force users to change passwords after the specified number of days.
Force all users to change password on next login	Select this to force users to change passwords the next time they log in.

Option	Description
Meetings section	
All meetings must be unlisted	*Applies to Sales Center, Meeting Center, Event Center, and Training Center.* Select this to require that all WebEx sessions be unlisted on the site calendar.
Allow attendees or panelists to join before host	*Applies to Meeting Center, Event Center, Sales Center, and Training Center only.* Select this to allow attendees or panelist to join the sessions before the host joins the session.
The first attendee to join will be the presenter	*Applies to Meeting Center only.* Select this to designate the first attendee that joins the meeting before the host as the presenter. This attendee will have the ball and can share content within the meeting.The join session before host option must first be enabled.
Allow attendees or panelists to join teleconference before host	*Applies to Meeting Center, Event Center, Sales Center, and Training Center only.* Select this to allow attendees or panelist to also join the teleconference before the host joins the sessions. The join session before host option must first be enabled.
All meetings must have a password	*Applies to Meeting Center, Event Center, Sales Center, and Training Center only.* Select this to require that users must provide a valid password for all scheduled WebEx sessions. **Important** By default, the all meetings must have a password option is selected. WebEx strongly recommends that you leave this option selected to help ensure the security of meetings on your site.
Require strict password for meetings	Select this to require that all WebEx session passwords comply with the strict password criteria that you specify. For more information about strict password criteria, see *"Specifying SSO Configuration"* (on page 140)
Display teleconference information on meeting Info tab and Information window	This option controls the display of teleconference information when Personal Conference Numbers are used for telephony. Subscriber access code information can also be displayed with a sub-option. By default, the options are enabled but can be disabled for security.
Automatically end meetings if there is only one participant	*Applies to Meeting Center, Event Center, Sales Center, and Training Center only.* Select this option to automatically end WebEx sessions after a specified period of inactivity. You can specify that session hosts be warned a certain number of minutes so that they can prevent the meeting from automatically ending in a specified number of minutes.

Option	Description
Include Host Key in host meeting emails	*Applies to Meeting Center, Event Center, Sales Center, and Training Center only.* Select this option to automatically include the host key in the host meeting emails.
Share folders section	
Hosts cannot share folders	Select this to prevent users from sharing y files and folders on their My Files page.
Hosts can share folders	Select this to allow users can display files and folders from the My Files page on their Personal Meeting Room page. Than select who users can share files with from the drop-down list.
All shared folders must have a password	Select this to require that users specify a password for others who want to access their shared folders.
Apply strict password:	When you select the option above, select this to require that users select shared folder passwords which match your strict password requirements. For more information about strict password criteria, see *"Specifying SSO Configuration"* (on page 140).
Other section	
Require login before site access	Select this to require that all users must have an account and log in to your WebEx service site to host or attend WebEx sessions.
Require attendee email address	*Applies to Meeting Center, Sales Center, and Training Center only.* Select this to require that attendees provide an email address to join WebEx sessions.
All Access Anywhere sessions must use strict access code	Select this to require that users specify Access Anywhere passwords that conform to your strict password criteria. For more information about strict password criteria, see *"Specifying SSO Configuration"* (on page 140).
Allow user to store personal information for joining meetings and call-back teleconferences	Select this to allow users to store and access personal information, such as name, email, and registration. You can also use this option to remember previously and frequently used numbers when using the Join Teleconference dialog.
Allow individual hosts to reassign their recordings	Select this to allow a host to transfer ownership of a network-based recording file to another user.

3 Click **Update** to save your changes.

Specifying SSO Configuration

You can set up SSO configuration and Partner SAML Authentication Access. Only X.509 certificates are supported.

To configure certificates:

1. On the navigation bar, under **Manage Site**, click **SSO Configuration**.
2. Click the **Site Certificate Manager** link a the top of the page.
3. At **Import your certificate**, click **Browse** to import a certificate to your site.
4. Enter the directory and file name for your certificate and click Open.
5. Click **OK**, then click Close to close the Certificate Manager.

Viewing Certificates

To view certificates:

1. On the navigation bar, under **Manage Site**, click **SSO Configuration**.
2. Under **Partner SAML Authentication Access**, click **View Details** to the right of the Certificate you want to view.
3. Click **Close** to close the certificate page.

Specifying strong password criteria

You can mandate that passwords conform to a password format you specify. You have several options to mandate a specific password format. These typically include specifying that a password must:

- Contain a minimum number of characters, numbers, and special characters
- Contain a combination of upper and lowercase letters
- Not contain the site URL, the host name, the WebEx session topic name, or contain specific words

See *Using specific characters in your passwords* (on page 141) for more detailed information.

Using specific characters in your passwords

Account passwords are automatically generated when a user signs up for a fresh account, resets the password, or imports account information from a .csv file. In such cases, you cannot use the following characters in the (automatically-generated) password:

- ‘ (back quote, the character located on the tilde key)
- L (uppercase L)
- l (lowercase L)
- 1 (the numeral, one)
- O (uppercase O)
- o (lowercase o)
- 0 (the numeral, zero)

However, this restriction will be overridden if the site security settings enforce the use of special characters.

To specify strong password criteria:

1. On the navigation bar, under Manage Site, click Site Settings.
2. (Optional) To specify the types of passwords you want to conform to the strong password criteria you specify, scroll down to the Security Options section and select any of the following:

Password type	Select this...
User accounts	Require strong passwords for user accounts. **Note:** Specifying strong password criteria for user accounts is mandatory. This check box is selected by default and cannot be unchecked.
Meetings and other types of WebEx sessions	Require strong passwords for meetings.
Share folders	Apply strong meeting password criteria

Password type	Select this...
Access Anywhere sessions	All Access Anywhere sessions must use strong meeting password criteria for access code

3 To set the password criteria, scroll down to the **Strong Meeting Password Criteria** section and choose from the following options:

Option	Description
Require mixed case	Select this to require that all passwords contain upper and lowercase letters. **Note:** Passwords must contain at least one upper and one lowercase letter.
Minimum length	Enter the minimum number of characters (letters, numbers, and special characters) that passwords must contain.
Minimum number of numeric	Enter the minimum number of numbers that passwords may contain.
Minimum number of alpha	Enter the minimum number of letters that passwords may contain.
Minimum number of special characters	Enter the minimum number of special characters that passwords may contain. **Tip:** We recommend not using certain special characters when you specify your password criteria. These include characters such as: ▪ ' (back quote) ▪ " (double quotes) ▪ # ▪ - Avoiding these special characters will prevent users from making mistakes when they log on from their mobile phones where these characters can be hard to locate or confusing to type in.

Option	Description
Do not allow dynamic web page text for meeting passwords	Select this to prevent users from specifying passwords that contain: ▪ the URL for site on which the meeting, event, or session occurs—for example, your_company.webex.com ▪ the host's own name ▪ the topic name For example, if the host's name is "Wendy Smith", the following passwords are not allowed: Wendy, Smith, WendySmith, wendy, wendysmith, wendysmeeting, meetwithwendy, and so on.
Do not allow any character to be repeated 3 times or more	Select this to prevent users from repeating any characters three times or more.
Do not allow dynamic web page text for account passwords (site name, host's name, user name)	Select this to prevent users from specifying user account passwords that contain the site or host name, user name, or topic name.
Do not allow account passwords from this list	Select this to prevent users from specifying WebEx session passwords that contain text you specify. Then click **Edit List**, enter the text you do not want to allow, and then click **Save List**.

4 Click **Update** to save your changes

Enabling digital certificates (PKI)

Use digital certificates to encrypt WebEx session data and prevent unauthorized access as data travels across the Internet. As the site administrator, you manage the root certificate that is used to validate all certificates used within your organization. You can:

- Import up to 10 root certificates, delete them, or just view information about the certificate, see *"Managing the root certificate"* (on page 144) for details.
- Assign certificates to a specific type of WebEx session, see *"Assigning a certificate to a session type"* (on page 144) for details.

Note: Attendees who try to access WebEx sessions without a valid digital certificate will be asked to check the meeting email invitation for more information about obtaining a valid certificate. You can edit the message that appears in the email message (see *Customizing email templates* (on page 133) for details).

Managing the root certificate

To manage root certificates:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. Click **Root Certificates** at the top of the page.

   See a list of digital certificates and the certificate authority issued the certificate.
3. To import a new certificate:
   a) Click **Import Root Certificate**.
   b) To select a certificate from a local drive, click **Browse** and select the certificate. Certificate files have the file extension "crt" or "cer".
   c) To enter the content of a certificate file, enter it in the text box.
   d) Click **Import**.
4. To delete a certificate, check the box next to the certificate and click **Delete**.
5. Click **Update**.

Assigning a certificate to a session type

To assign a root certificates to a WebEx session type:

1. On the navigation bar, under **Session Types**, click **Session Type List**.
2. Click the desired session type.
3. Scroll down to **PKI encryption** and check the box adjacent to it.
4. Click **Update**.

11

Managing Session Types

If you want to…	See…
get an overview of managing session types	*About session types* (on page 145)
understand session type features	*Understanding session type features* (on page 146)
create custom session types	*Creating custom session types* (on page 149)
create a Cisco Unified Videoconferencing (CUVC) Session Type	*Creating a Cisco Unified Videoconferencing (CUVC) Session Type* (on page 151)
enable a session type for a host account	*Enabling a session type for a host account* (on page 154)
edit a custom session type	*Changing a custom session type* (on page 154)
activate or deactivate a custom session type	*Activating or deactivating a custom session type* (on page 154)

About session types

Session types define the features and options that are available for scheduled sessions. If your WebEx service has the custom session types option enabled, you can create up to four custom session types for each primary session type that your service includes.

Note: The primary session types for your WebEx service are listed on the Home page in Site Administration, under **Session Types**.

For example, if your WebEx service includes the Meeting Center Pro session type, you can create four additional "Pro" session types that each provide a different set of features and options.

After you create a custom session type, you can assign it to specific users, to manage security, bandwidth usage, or similar administrative activities. For example, you can use session types to prevent specific users from using the "remote control" option during desktop sharing, so others outside your organization cannot access files on employees' computers or on network servers. Simply create a custom session type that does not include the remote control option, and then assign only this session type to specific users by editing their accounts.

Depending upon your WebEx pricing model, a certain number of named host accounts may be associated with each session type. This controls how many people in your organization can host meetings.

You can manage session types by:

- *Creating custom session types* (on page 149)
- *Changing a custom session type* (on page 154)
- *Activating or deactivating a custom session type* (on page 154)

Understanding session type features

The following feature options are for a Meeting Center PRO custom session type, but are typical for all WebEx services.

Note: Some WebEx features listed in the user interface will be marked as "Not available" if they were not provisioned for your site by the super administrator. Features that are not available for Meeting Center are noted here.

Features	Select to
Alert - blinking	See an orange alert if a participant's panel is collapsed or closed and it requires attention (e.g., someone joins the meeting, a poll opens, chat message received). The alert status remains flashing until the participant opens and views the change.
Alert - sound	Play a sound when certain meeting events occur (e.g., someone joins or leaves the meeting, a participant selects the Raise Hand icon, chat message received).
Application sharing	Allow presenters to show one or more applications to demonstrate

Features	Select to
	software or edit documents.
Application sharing - remote control	Allow participants to request remote control of the application that the presenter is sharing.
Breakout sessions	*Not Available for Meeting Center*
Custom scripts	*Not Available for Meeting Center*
Chat	Determine whether Chat feature is available. If so, determine whether Chat panel will be opened, minimized, or closed for participants by default when meeting starts.
Closed captions	Determine whether Closed Captions feature is available. If so, determine whether Closed Captions panel will be opened, minimized, or closed for participants by default when meeting starts.
Document and presentation sharing	Allow presenters to share documents or presentations that do not need to be edited during the meeting.
Desktop sharing	Allow presenters to share entire contents of their computers, including applications, windows, file directories, and mouse movements.
Desktop sharing - remote control	Allow participants to request remote control of the presenter's desktop.
Desktop/Application/Web Browser sharing - True Color support	Allow presenters to share content with presenters in True Color mode. True Color mode provides more detailed color, with options for either better imaging or better performance.
Feedback	*Not Available for Meeting Center*
File transfer	Allow participants to transfer files to each other during a meeting. ▪ Choose to include mapped network drives for file locations.
Hands-on demo	*Not Available for Meeting Center*
Hands-on lab	*Not Available for Meeting Center* ▪ File Browsing – *Not Available for Meeting Center* ▪ Display local mapped network drivers – *Not Available for Meeting Center* ▪ Display remote mapped network drivers – *Not Available for Meeting Center*
Log on as a different user	*Not Available for Meeting Center*
Look who's talking	Allow the participant that is currently speaking to be identified by a flashing icon next the participant's name.

Features	Select to
Meeting transcript	Allow hosts to send general meeting information and files in an email to participants.
Notes	Determine whether Notes feature is available. If so, determine whether Notes panel will be opened, minimized, or closed for participants by default when meeting starts.
Outlook/Lotus Notes Integration	Allow users to schedule meetings with Microsoft Outlook or IBM Lotus Notes.
Participant list	Determine whether Participant list feature is available. If so, determine whether Participants panel will be opened, minimized, or closed for participants by default when meeting starts.
Polling	Determine whether Polling feature is available. If so, determine whether Polling panel will be opened, minimized, or closed for participants by default when meeting starts. Enable these polling control options: ▪ Display individual results – share poll results with attendees anonymously ▪ Save individual results – save responses from each attendee in a .txt file ▪ Testing and Grading – *Not Available for Meeting Center* ▪ Include no answer – allow short-answer questions ▪ Show number of responses – list number of attendee responses in polling status
End-to-End Encryption	Encrypt all WebEx session data.
PKI Encryption	Use digital certificates (PKI) to encrypt WebEx session data.
Practice Session (Event Center only)	*Not Available for Meeting Center*
Q & A	*Not Available for Meeting Center*
Participant can grab presenter role	Allow participants to take the presenter ball directly from another participant so that they can share content during the meeting.
Recording client-side	Allow hosts to record meetings on their local drives.
Recording network-based	Allow hosts to record meetings on the network server.
Remote computer sharing	Allow presenters to share content that resides on a remote computer.
Remote printing	Allow presenters to print content that is being shared in a meeting.

Features	Select to
Share web content	Allow presenters to share their web browsers.
Show QuickStart to host and presenter	*Not Available for Meeting Center as an option – default for all hosts and presenters* ▪ Show QuickStart to all attendees as well – *Not Available for Meeting Center and Training Center*
Video	Determine whether Video feature is available. If so, determine whether Video panel will be opened, minimized, or closed for participants by default when meeting starts.
WebEx Video	Allow high-quality video for meetings on your site. ▪ Multi-point video ($C only) – *Not Available for Meeting Center or Training Center* ▪ Allow Cisco Unified Videoconferencing (CUVC) ▪ Allow entering a CUVC Meeting ID in the meeting scheduler
Web browser sharing	Allow presenters to share web browsers and related web content during the meeting.
Web browser sharing - remote control	Allow participants to share web browsers and related web content during the meeting.
Web-based testing	*Not Available for Meeting Center*

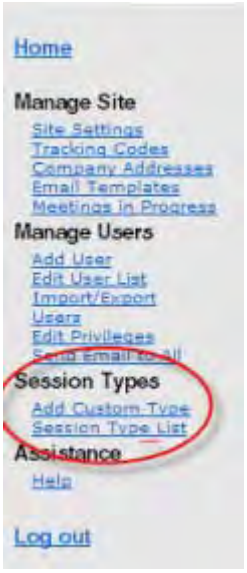
Creating custom session types

You can create up to four custom session types for each primary session type that your WebEx service includes. You must have custom session types options enabled in order to see Session Types options in the navigation bar. For more information or if you do not see Session Types in the navigation bar, contact your WebEx representative.

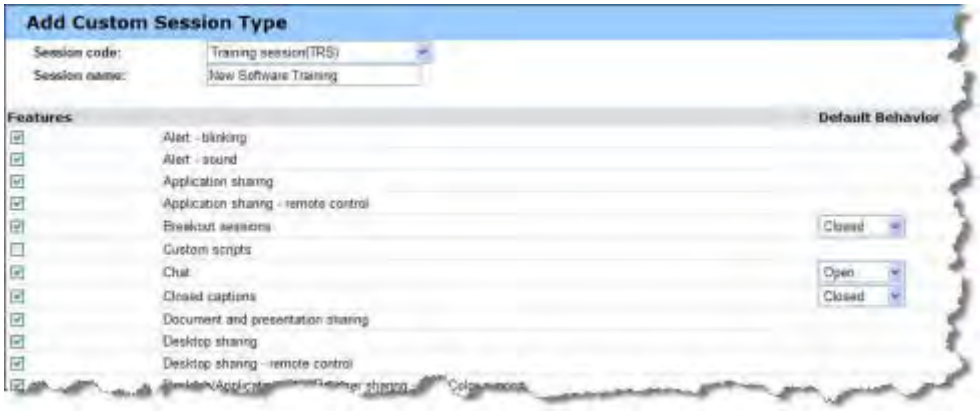
Note: Once you create a new session type, you cannot delete it. However, you can modify it or deactivate it.

To create a custom session type:

1 On the navigation bar, under Session Types, click Add Custom Type.



The Add Custom Session Type page appears.



2. At Session code select the primary session type for which you want to create a custom session type.
3. At Session name enter a name for the custom session type.
4. In the Features section, select the features that you want to include in the session type.
5. To allow users to use UCF files with this session type, in the UCF section, check UCF rich media then indicate the maximum allowed size of UCF files.
6. Click Add. The session type is added to the List of Session Types page.

Note: To make it possible for hosts to host sessions with the custom session type you just created, enable the session type for the host user account. See *Enabling a session type for a host account* (on page 154).

Creating a Cisco Unified Videoconferencing (CUVC) Session Type

The Cisco Unified Videoconferencing (CUVC) session type enables you to integrate WebEx services with videoconferencing sessions on the CUVC system. A meeting ID helps you accomplish this integration.

Before you can integrate WebEx services with the CUVC system, ensure that:

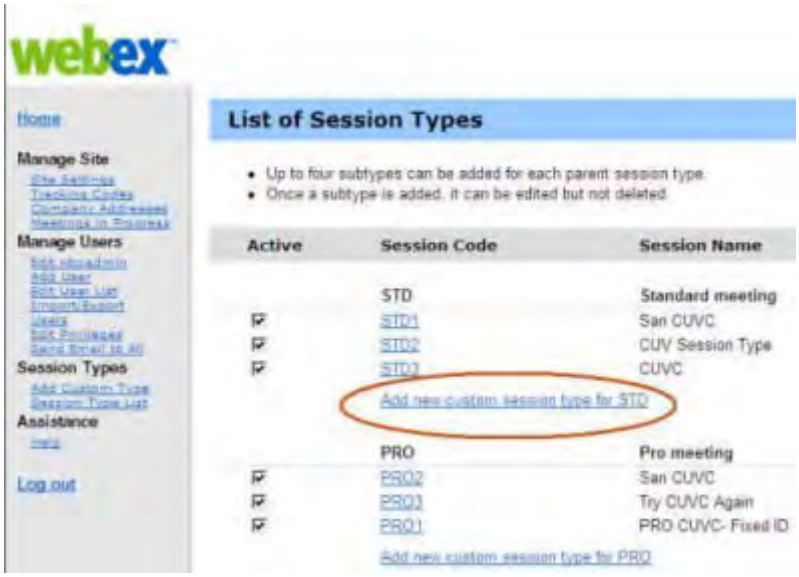
- The Super Admin has enabled the CUVC option for the entire Site.
- The Site Admin has enabled the CUVC option in the Site Admin settings page.

Note: If the Site Admin enables the CUVC option, the CUVC Desktop will replace WebEx video during a session.

The Site Admin can configure the CUVC integration by using either a Dynamic CUVC meeting ID or a custom CUVC meeting ID.

To create a CUVC session type:

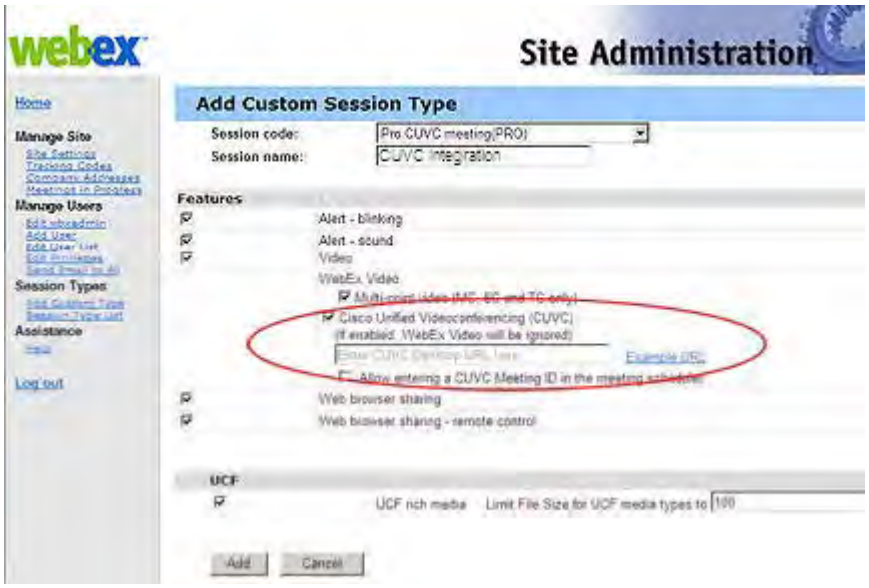
1. On the navigation bar, under **Session Types**, click **Session Type List.**
2. Under the Session Code where you want to create a new CUVC session type, click **Add new custom session type for <session type>.**



3 In the **Add Custom Session Type** page, type a name for the session type in the **Session Name** box.

4 Scroll down to locate the **Cisco Unified Videoconferencing (CUVC)** option.

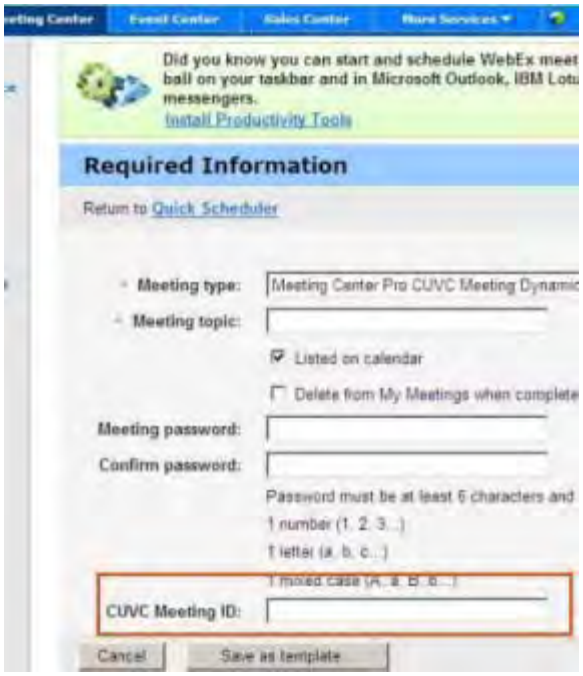
Note: If you do not see the **Cisco Unified Videoconferencing (CUVC)** option, contact the Super Admin to enable it.



5 Select **Cisco Unified Videoconferencing (CUVC)** and type the CUVC URL to enable the CUVC integration with the selected WebEx service. If you do not provide the CUVC URL, an error message displays when you try to add the session type.

6 **Optional**. Configure the CUVC integration by providing either the Custom CUVC Meeting ID or the Dynamic CUVC Meeting ID.

- To provide the Custom CUVC Meeting ID, select **Allow entering a CUVC Meeting ID in the meeting scheduler.** In this case, the Advanced Scheduler in Meeting Center displays the **CUVC Meeting ID** box, as shown in the following sample graphic.



- To provide a Dynamic CUVC Meeting ID, do not select **Allow entering a CUVC Meeting ID in the meeting scheduler**. The WebEx meeting number will represent the CUVC Meeting ID when you schedule a meeting. You also need to include a "service prefix" in the %MeetingID% variable for the CUVC URL. For example, http://hostname.example.com/path/?ID=<Service_Prefix>%MeetingID%. The **Allow entering a CUVC Meeting ID in the meeting scheduler** checkbox is not selected by default.

7 **Optional**. Click **Example URL** to view the Help topic for the CUVC configuration.

8 Click **Add** to create the CUVC session type.

Enabling a session type for a host account

Use this procedure to associate session types for host user accounts.

To assign a custom session type to a user account:

1. On the navigation bar, under **Manage Users**, click **Edit User List**.
2. Find the user in the list.
3. In the **Session Type** section, select the custom session type.
4. Click **Submit** at the bottom right-hand side of the page to save your changes.

Changing a custom session type

Use this procedure to change features associated with a custom session type.

To change a custom session type:

1. On the navigation bar, under **Session Types**, click **Session Type List**.
2. Click the link for the custom session type that you want to edit.
3. Make changes to the session type.
4. Click **Update**.

Activating or deactivating a custom session type

Instead of deleting session types, you can deactivate them. Use this procedure to deactivate session types or to reactivate them.

To activate or deactivate a custom session type:

1. On the navigation bar, under **Session Types**, click **Session Type List**.
2. Under **Active for a session type**, select or clear the check box to activate or deactivate the session type, respectively.
3. Click **Update**.

12

Setting Remote Access Options

If you want to…	See…
get an overview of managing Remote Access	*About Remote Access options* (on page 156)
configure the default installation settings for Remote Access computers on site	*Setting default installation options* (on page 158)
specify the default view and color settings for Remote Access	*Specifying Remote Access default view and colors* (on page 173)
specify default security options for Remote Access sessions on your site	*Specifying Remote Access security options* (on page 166)
install the Remote Access Agent on remote computers	*Setting up computers for Remote Access* (on page 156)
manage Remote Access computers and groups	*Specifying Remote Access security options* (on page 166)
assign Remote Access computers and groups to specific support representatives	*Assigning Remote Access groups and computers to support representatives* (on page 171)
monitor Remote Access sessions that support representatives conduct with customers	*Monitoring Remote Access sessions* (on page 172)
view Remote Access usage reports	*Viewing Reports* (on page 209)

About Remote Access options

You can manage Remote Access perform the following:

- Configure the default installation settings for Remote Access computers on your Support Center site.
- Specify the default view and color settings for application or desktop sharing during a Remote Access session.
- Specify security options for Remote Access sessions on your site, including:
  - Limit access to Remote Access computers by IP address
  - Specify access code for connecting to Remote Access computers
  - Verify access to Remote Access computers by phone authentication
- Install the Remote Access Agent on remote computers
- Manage Remote Access computers and groups on your Support Center site, including:
  - Adding, deleting, and rearranging computers and groups
  - Editing descriptive information about computers and groups
  - Modifying security settings for individual computers or groups

Setting up computers for Remote Access

You can set up a computer for remote access in any of the groups you created. If you do not know the group for which you want to assign the computer, you can set it up in the Root group first and assign it to another group later.

To set up a computer for remote access, you or the customer must first install the Remote Access Agent on the computer—that is, the *remote computer*. To start a Remote Access session, a support representative logs in to your WebEx service Web site on a computer, called the *local computer*, and establishes a connection with the remote computer.

Before installing the Remote Access Agent, ensure that both the remote and local computers meet the minimum system requirements.

There are three ways of installing the Remote Access Agent:

- **Remote Access Setup Wizard:** Follow the instructions in the wizard to complete installation. For details, see *Sending the Remote Access installer link to users* (on page 160).
- **Manual installer:** Run the Remote Access manual installer, and then follow the instructions in the Remote Access Setup Wizard to complete installation. For details, see *Downloading the Remote Access Agent installer* (on page 162).

  Note: The manual installation option is useful if you want to distribute the installer via CD-ROM or if your system or network does not allow you to install the Remote Access Agent directly from the Remote Access Setup Wizard.

- **Silent installation:** This option allows you to install the Remote Access Agent without requiring any user interaction, such as specifying options in a wizard. For details, see *Using a silent installer to install Remote Access* (on page 163).

Minimum system requirements

Prior to installing the Remote Access Agent, verify the computer meets the following minimum system requirements:

- Microsoft Windows 2000, XP, or 2003 Server
- Intel x86 (Pentium 400 MHz +) or compatible processor
- 128 MB RAM
- Microsoft Internet Explorer 6+, Netscape 7+, Mozilla 1.4+, or Firefox 1.0+
- JavaScript and cookies enabled on the Web browser; ActiveX enabled on Internet Explorer; Java 1.3
- Internet connection (For the remote computer, a dedicated, broadband Internet connection, such as DSL, cable modem, ISDN, or T1 connection; for the local computer, at least a 56K connection)

Setting up the Remote Access Agent for your proxy server

You can install the Remote Access Agent on a server that requires proxy server authentication. The Remote Access Setup Wizard automatically detects the proxy server and displays a dialog box in which you provide the proxy server information.

Before you can proceed to the **Options** panel on the Remote Access Setup Wizard, provide your information in the Enter Proxy Server Password dialog box, as follows:

1. Provide the user ID and password in the appropriate boxes, and then click **OK**.
2. Click **Next** on the **Account Information** panel.

You can continue the Remote Access Agent installation.

Setting default installation options

The default values for Remote Access installation on your Support Center site, specified here, take effect on a Remote Access agent when a customer is invited to install the agent on a remote computer.

To configure Remote Access default installation settings:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Specify the options under **Default Installation Values**.

If you want to…	See…
Computer name	Specifies, when the Remote Access Agent is being installed on a remote computer, whether the name of the Remote Access computer matches the machine name of the remote computer. Users can change the Remote Access computer name later.
URL	Specifies the site URL to which Remote Access Agent connects. To specify the URL, type it in the box. **Disallow change**: If selected, the corresponding URL option in Remote Access agent is disabled during installation.
Security Key	Specifies a security key composed of letters and numbers between 6 and 16 characters in length.
Ask for approval before session starts	Specifies whether a CSR need to get a customer's approval before starting a Remote Access session with the customer. **Disallow change**: If selected, the corresponding

If you want to…	See…
	option in Remote Access agent is disabled.
Lock this computer at end of Session	Specifies whether the remote computer is locked after a Remote Access session ends. **Disallow change**: If selected, the corresponding option in Remote Access agent is disabled.
Disable this computer's keyboard and mouse	Specifies whether a remote computer's keyboard and mouse is disabled when the remote computer is in a Remote Access session. **Disallow change**: If selected, the corresponding option in Remote Access agent is disabled.
Blank out this computer's screen when in session	Specifies whether a remote computer's screen is blanked out when the remote computer is in a Remote Access session. **Disallow change**: If selected, the corresponding option in Remote Access agent is disabled.
Access entire desktop	Specifies whether a customer shares the entire desktop with CSR in a Remote Access session. In addition to sharing the entire desktop, the customer can share specific applications. **Disallow change**: If selected, the corresponding option in Remote Access agent is disabled.
Send Email when computer is accessed to	Specifies the email address to which a notice email message is sent when a Remote Access session starts. To specify the email address, type it in the box. **Disallow change**: If selected, the corresponding option in Remote Access agent is disabled.
End Session after minutes of inactivity	Specifies the email address to which a notice email message is sent when a Remote Access session ends. To specify the email address, type it in the box. **Disallow change**: If selected, the corresponding option in Remote Access agent is disabled.
Keep session logs in this local directory	Specifies a local directory on the remote computer, in which Remote Access session logs will be stored. To specify the directory, type it in the box. **Disallow change**: If selected, the corresponding option in Remote Access agent is disabled.
Send session logs to the following email	Specifies the email address to which the session

If you want to…	See…
address(es)	log is sent when a Remote Access session ends. **Disallow change**: If selected, the corresponding option in Remote Access agent is disabled.
Allow blocking of computer	Specifies whether the **Block this Computer** command in Remote Access agent is enabled.
Hide Remote Access?	Specifies whether the Remote Access Agent icon displays on the remote computer. Selecting **Yes** hides not only the agent icon on the taskbar but also the Remote Access Agent options in the **Start** > **Programs** menu on the desktop.

4 Click **Update**.

Sending the Remote Access installer link to users

This option sends an email message containing a link that a customer can click to install the agent. Use this option if the customer can access the email on the remote computer.

To install the Remote Access using the setup wizard:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

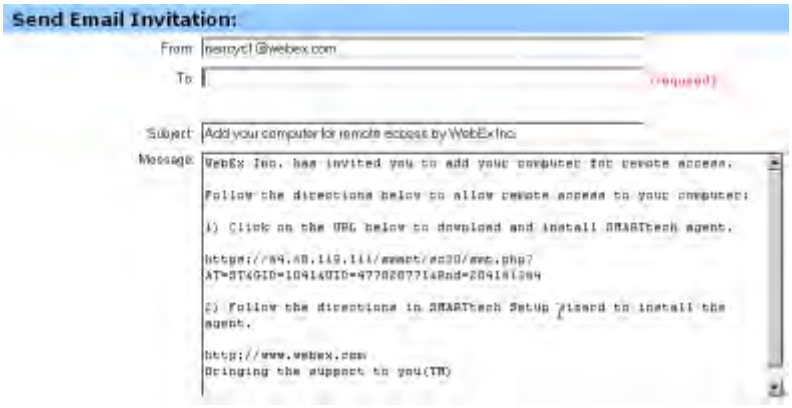
2 In the **Site Settings for** drop-down list, select **Remote Access**.

3 Click the **Manage Groups** link to locate the group in which you want to set up the computer.

In the **Actions** column, click the icon for the group.

The Send Email Invitation window appears. It contains an invitation to set up a computer for remote access and a link that the customer at the remote computer can click to start the Remote Access Setup Wizard.

The following is an example of the Send Email Invitation window.



4 In the **To** box, type an email address that the customer can access on the remote computer, and then click **Send**.

5 On the remote computer, the customer opens the email, and then clicks the URL link in the email.

6 On the Set Up Remote Access page, the customer clicks **Set up Remote Access**.

The setup wizard appears.

7 In the setup wizard, the customer types information and specifies options on the following panels:

Account Information—Type a *computer name* and the URL to your WebEx service site if they are not displayed. Then click **Next.**

For more information, see *Setting up the Remote Access Agent for your proxy server* (on page 157).

If you are installing the Remote Access Agent on a server with proxy server authentication enabled, the Remote Access Setup Wizard automatically detects the proxy server and displays a dialog box in which you provide the proxy server information. For details, see *Setting up the Remote Access Agent for your proxy server* (on page 157).

Options—Specify the options for the computer that you want to access remotely. Then click **Next**.

Access—Select the applications that you want to access on the remote computer or select the computer's entire desktop. Then click **Next**.

8 On the **Setup Complete** panel, the customer clicks **Finish** to install the agent on the remote computer.

The Remote Access Agent logs the remote computer in to the Remote Access network.

The **WebEx Remote Access - Available** icon appears on the remote computer's taskbar.

The computer, represented by the computer icon on the **Manage Groups** page, appears in the group you selected.

The computer is available for remote access now.

Downloading the Remote Access Agent installer

A customer at the remote location downloads and runs the Remote Access manual installer before starting the Remote Access Setup Wizard.

To install the Remote Access Agent using the manual installer:

1. On the remote computer, the customer goes to your WebEx service Web site.
2. On the navigation bar, the customer expands **Assistance**, and then clicks **Support**.
3. On the Support page, the customer goes to the **Downloads** section, and then clicks the **Download Remote Access Installer for Windows** link.
4. The customer downloads and runs the InstallShield Wizard for WebEx Remote Access.
5. The Remote Access setup wizard appears. In the setup wizard, the customer types information and specifies options on the following panels:
   - **Account Information**—Type a *computer name* and the URL to your WebEx service site. Then click **Next**.

     For details, see *"Sending the Remote Access installer link to users"* (on page 160).

If you are installing the Remote Access Agent on a server with proxy server authentication enabled, Remote Access Setup Wizard automatically detects the proxy server and displays a dialog box in which you provide the proxy server information. For details, see *"Setting up the Remote Access Agent for your proxy server"* (on page 157).

- **Options**—Specify the options for the computer that you want to access remotely. Then click **Next**.
- **Access**—Select the applications that you want to access on the remote computer or select the computer's entire desktop. Then click **Next**.

6 On the **Setup Complete** panel, the customer clicks **Finish** to complete installation of the Remote Access Agent.

The Remote Access Agent logs the remote computer in to the Remote Access network.

The **WebEx Remote Access - Available** icon appears on the remote computer's taskbar.

The computer, represented by the computer icon on the **Manage Groups** page, appears in the Root group.

The computer is now available for remote access.

Using a silent installer to install Remote Access

The silent installation option allows you to install the Remote Access Agent on multiple computers without requiring any user interaction.

Note: Your registry key file contains variables that are used when you execute the command for the Remote Access Agent installation. Before running silent installation of the Remote Access Agent, you must replace the variables in the registry key file with the appropriate information on your WebEx service Web site. The following table describes how you can provide the appropriate syntax for each key.

Key	Description
"SilentSiteURL"="yourcompanywebsite"	The URL for your WebEx service Web site. Replace yourcompanywebsite with the URL of your WebEx service Web site. For example, the syntax can be "SilentSiteURL"="xyz.webex.com"
"GroupID"="0"	The ID for the group in which you want to set up Remote Access computers. You can look up the group ID in an invitation email message for the appropriate group. To obtain the group ID, go to the Manage Groups page, and then click the **Send Email Invitation** icon for the group. The URL in the email invitation contains the group ID. For example, for this invitation URL, https://wbs21sc.webex.com/wbs21sc/sc30/smt.php?AT=ST&UID=0&GID=2680, the group ID is 2680. If you don't specify one, the default group ID is 0; the computer will then be added to the Root group.
"Name"="nameofcomputer"	Name of the computer. Replace name of computer with the name you want to give to the computer. If you leave it blank, the default name is the user name for the remote computer.
"Alias"="aliasofcomputer"	Alias of the computer. If you leave it blank, the computer will not have an alias.
"ProxyUser"="Proxyserverusername"	User name for your proxy server authentication. If you use proxy server authentication, replace Proxyserverusername with the user name for the proxy server.
"ProxyPassword"="Proxyserverpassword"	Password for your proxy server authentication. If you use proxy server authentication, replace Proxyserverpassword with the password for the proxy server.

Key	Description
"SystemTrayIcon"="0"	Determines whether to show or hide the Remote Access Agent icon on the task bar of the computer. If you hide the Remote Access Agent icon, the Remote Access Agent options also do not display in the **Start** > **Programs** menu on the desktop. The value 0 shows the Remote Access Agent icon. The value 1 hides the Remote Access Agent icon. The default value is 0.

To run silent installation of the Remote Access Agent:

1. Go to your WebEx service site.
2. On the navigation bar, expand **Assistance**, and then click **Support**.
3. On the Support page, go to the **Downloads** section, and then click the **Download Remote Access Installer for Windows** link.
4. Save the Remote Access manual installer on the computer.

   The file name is atsmt.msi.
5. Using your software distribution solution, do the following:

   a) Download the atsmt.msi file.

   b) Create the following registry key:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\WebExSilentInstaller
]
SilentSiteURL"="yourcompanywebsite
GroupID=0
Name=nameofcomputer
Alias=aliasofcomputer
ProxyUser=Proxyserverusername
ProxyPassword=Proxyserverpassword
SystemTrayIcon=0
```

   c) In the command prompt, go to the folder where the atsmt.msi file was downloaded, and then run the following command:

```
msiexec /i atsmt.msi /qb
```

The Remote Access Agent logs the remote computers in to the Remote Access network.

The **WebEx Remote Access - Available** icon appears on the taskbar of each remote computer.

The computers, represented by the computer icon on the **Manage Groups** page, appear in the Root group and become available for remote access.

Specifying Remote Access security options

An access code is used by a customer support representative (CSR) to establish the connection with a customer's remote computer.

You can specify if phone authentication will be added to the Remote Access session verification process. If phone authentication is enabled, a customer support representative (CSR) will receive a call back when he or she wants to establish the connection with a remote computer. The CSR needs to provide the phone access code before he or she can enter the Remote Access session.

You can define up to three ranges of IP address, which your organization's WebEx site would allow to access remote Remote Access computers.

To control access to remote computers:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Under **Access Code**, specify relevant options and click **Apply to All** to apply these settings to all groups and computers on the site.
4. Under **Phone Authentication**, specify appropriate options and click **Apply to All** to apply these settings to all groups and computers on the site.
5. Under **Limit Access by IP Address**, specify a IP range by typing the starting and ending IP address in the **Between** and boxes, respectively.

6 Click **Update**.

Changing access code or phone authentication options for Remote Access groups

You can change access code or phone authentication options for a group. If it is necessary, you can also apply the same access code options for all lower-level groups and computers within the group.

To change access code or phone authentication options for a group:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **Remote Access**.

3 Click **Manage Groups**.

4 Locate the group for you want to change options.

5 In the **Actions** column, click the icon for the group.

6 In the **Access code** or **Phone authentication** section, specify the access code or phone authentication options.

7 If you want to apply the same access code settings to all lower-level groups and computers within the group, click **Apply to Lower Levels**.

8 If you want to prevent those access code settings from being changed, select **Disallow changes for all lower level groups and computers**.

9 Click **Update** to save your settings.

For details about access passwords and phone authentication, see *Specifying Remote Access security options* (on page 166).

Changing access code or phone authentication options for Remote Access computers

You can change access code or phone authentication options for a computer.

To change access code or phone authentication options for a computer:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

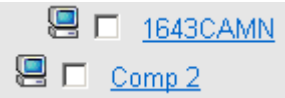
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Click **Manage Groups**.
4. Locate the computer for which you want to change options.
5. Click the link for the computer.
6. In the **Access code** or **Phone authentication** section, specify the access code or phone authentication options.
7. Click **Update** to save your changes.

For details about access passwords and phone authentication, see *Specifying Remote Access security options* (on page 166).

Changing a remote computer description or alias

You can change the description or alias of a computer from the Manage Groups page.

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Click **Manage Groups**.
4. Locate the computer for which you want to edit information.
5. Click the link for the computer. The following figure is an example.



6. In the Edit Computer window that appears, make your changes.
7. Click **Update** to save your changes.

Note:

- If the **Access code** and **Password expires in** boxes are unavailable, it means you have previously blocked changes to the access code for this level.
- For details about access passwords and phone authentication, see *Specifying Remote Access security options* (on page 166).
- For details about creating an alias for a computer, see *Sending the Remote Access installer link to users* (on page 160).

You can give a Remote Access computer the following two names:

- *Computer name*: When installing the Remote Access Agent on a remote computer using the Remote Access Setup Wizard, you or a customer can specify this name on the Account Information panel. The **Computer name** text box, by default, displays the name created by the network administrator at the remote location.

  Once a remote computer is set up for remote access, the customer can change the *computer name* from the Remote Access Agent on the remote computer.

- *Alias*: You can specify and edit this name any time on the Manage Groups page. For details, see "Changing a remote computer description or alias".

If you give a computer these two names, the *computer name* appears in the parentheses, following the *alias*, on your Manage Groups page and on a support representative's Remote Access page. The following figure shows an example.

Managing groups of Remote Access computers

In Site Administration, you can view a list of all the remote computers that customers have set up for Remote Access. You can also create a Remote Access group to apply the same security settings to all the Remote Access computers in the group.

In Site Administration, you can:

- Create a Remote Access group
- Add or remove computers from a Remote Access group
- Edit the name, description, and security settings for a Remote Access computer or group
- Move a Remote Access computer to a group, or move a group under another group
- Delete Remote Access computers or groups

You can also send an email invitation to customers to set up their computers for Remote Access. For details, see *Sending the Remote Access installer link to users* (on page 160).

Creating Remote Access groups

The Manage Groups page that you see for the first time contains one default group—Root. You can create up to three levels of groups and set up computers for remote access in any of the groups. Groups are represented by folder icons on this page.

To create a first-level group:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Click **Manage Groups**.
4. In the **Actions** column, click the icon for the Root group.

5. In the Create Group window that appears, type a group name and an optional description.
6. Click **OK**.

To create more first-level groups, follow the same instructions.

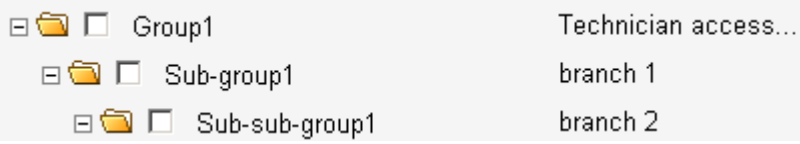
To create a sub-group:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Click **Manage Groups**.
4. Locate the group in which you want to create a sub-group.
5. In the **Actions** column, click the icon for the Root group.

6. In the Create Group window that appears, type a group name and an optional description.
7. Click **OK.**

To create more sub-groups, follow the same instructions.

The following figure shows an example of a group hierarchy.



Assigning Remote Access groups and computers to support representatives

You can assign Remote Access computers and groups to a customer support representative (CSR) when adding or updating a host account for Support Center. For details about assigning Remote Access computers to a CSR, see *Editing single user accounts* (on page 47).

Changing the group name or description

You can edit the name or description of a group.

To edit the name or description of a group:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Click **Manage Groups**.
4. Locate the group for which you want to edit information.
5. In the **Actions** column, click the icon for the Root group.

6. In the **General** section, make your changes in the Group name or Group description boxes, as appropriate.
7. Click **Update** to save your changes.

Rearranging computers or groups

You can move a computer or a group to a different group on the Manage Groups page.

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Click **Manage Groups**.
4. Select the check box for the computer or group that you want to move, and then click **Move**.

Tip: You can move multiple computers or groups simultaneously to the same group. The quickest way to move an entire group is to select its check box. This action selects all its sub-groups and computers.

5. In the list of groups that appear, select a destination group, and then click **OK**.

   Moving computers or groups to another destination group removes the original hierarchy. You can rearrange the hierarchy, if necessary.

Deleting a computer or group

You can delete a computer or group on the Manage Groups page.

You can also delete multiple computers or groups simultaneously. The quickest way to remove an entire group is to select its check box. This action selects all its sub-groups and computers.

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Click **Manage Groups**.
4. Select the check box for the computer or group you want to delete.
5. Click **Delete**.
6. Click **OK** to confirm that you want to delete the selected computer or group.

Monitoring Remote Access sessions

To monitor a support representative's Remote Access sessions, you can turn on auto-recording. If auto-recording is turned on, recording starts once a Remote Access session starts and stops once the session ends. The support representative cannot stop auto-recording during a session.

Recordings are saved to a local path you specified. The files have a .wrf extension.

To turn on auto recording for a support representative, edit the support representative's user account. For details, see *Editing single user accounts* (on page 47).

Specifying Remote Access default view and colors

You can specify the initial view and color settings for desktop or application sharing when a Remote Access session starts. During a Remote Access session, a representative can changes these settings.

To specify the initial view and color settings:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Remote Access**.
3. Under **View and Color Settings,** specify the options as appropriate.

Option	Description
View	Specifies how a shared application or desktop appears on a representative's and customer's screen. For example, if a customer is sharing an application, this option determines how the shared application appears in the viewer or the support representative's screen.
	Full screen - scale to fit: Specifies that a shared application or desktop appears in a full-screen view on a support representative's or customer's screen, and that the size of the application or desktop is adjusted to fit the full-screen view in its entirety.
	Full screen: Specifies that a shared application or desktop appears in a full-screen view on a support representative's or customer's screen, but that the size of the application or desktop is not adjusted to fit the full-screen view in its entirety.
	Window - **scale to fit:** Specifies that a shared application or desktop appears in a window a support representative's or customer's screen, and that the size of the application or desktop is adjusted to fit the window in its entirety.
	Window: Specifies that a shared application or desktop appears in a window a support representative's or customer's screen, but that the size of the application or desktop is not adjusted to fit the window in its entirety.

Option	Description
Color	Specifies the color setting for a shared application or desktop that appears on a support representative's or customer's screen. For example, if a customer is sharing an application, this option determines the color setting that affects the appearance of the shared application in the viewer or the support representative's screen.
	256 colors: Specifies that a shared application or desktop appears in 256 colors in the viewer or the support representative's or customer's screen. This option requires less bandwidth for sharing applications or desktops than the **High color** option does. Thus, this option is useful if a customer is using a dial-up connection to attend a support session.
	High color (16-bit): Specifies that a shared application or desktop appears in 16-bit color in the viewer or the support representative's or customer's screen. This option requires more bandwidth than the **256 color** option, but provides better imaging quality.

4 Click **Update**.

13

Setting Access Anywhere Options

If you want to…	See…
require approval for Access Anywhere setup	*Requiring approval to set up Access Anywhere* (on page 175)
accept or reject Access Anywhere setup requests	*Processing Access Anywhere requests* (on page 176)
view a list of users' remote computers	*Viewing a list of remote Access Anywhere computers* (on page 177)
end a user's Access Anywhere session	*Ending a user's Access Anywhere session* (on page 178)
remove a remote computer from a user's account	*Removing a remote computer from a user's account* (on page 179)

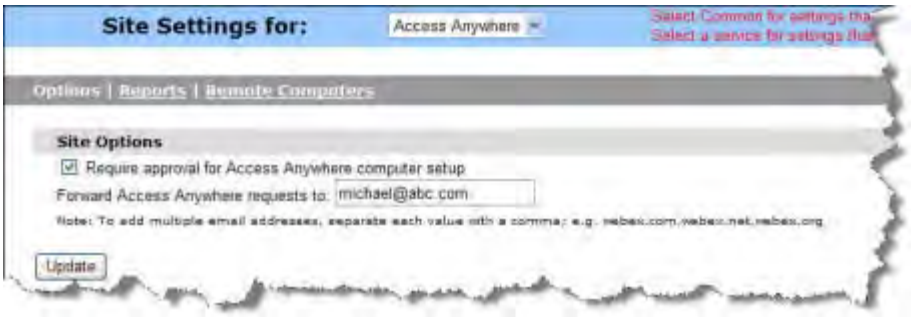
Requiring approval to set up Access Anywhere

You can require that users obtain approval for each remote computer that they want to set up for Access Anywhere. If you choose this option, once a user sets up the Access Anywhere Agent on a remote computer, the user receives a message, informing him or her that the remote computer is unavailable until the site administrator approves the setup request. You can then accept or reject the request, using Site Administration.

Site Administration can optionally send each setup request to an email address that you specify.

To require approval for Access Anywhere setup:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Access Anywhere**. The **Access Anywhere Options** page appears.



3. Select the **Require approval for Access Anywhere computer setup** check box.
4. Optional. Specify the email address to which you want Site Administration to send all Access Anywhere setup requests in the **Forward Access Anywhere requests to** box.
5. Click **Update** to save your changes.

Note: If you require approval for setup requests, you must accept or reject setup requests in the queue on the Approve Access Anywhere Requests page. For details, see *Processing Access Anywhere requests* (on page 176).

Processing Access Anywhere requests

If you require approval for users' requests to set up a remote computer for Access Anywhere, Site Administration places all requests in a queue that you can view, and sends a request notification email message to the address that you specify. You can either accept or reject each setup request.

For information about requiring approval for Access Anywhere setup, see *Requiring approval to set up Access Anywhere* (on page 175).

To accept or reject Access Anywhere setup requests:

1. On the Home page of your Site Administration Web site, click the **New Access Anywhere requests** link.

This link appears only if one or more users have requested to set up a remote computer on your site.

The Approve Access Anywhere Requests page appears.

2. To accept one or more setup requests, do the following:
   a) Select the check box for each setup request that you want to accept.
   b) Click **Accept**.

      For each accepted setup request, Site Administration automatically

      - ☐ sends an email message to the user who made the request, indicating that the request was accepted
      - ☐ adds the computer to the list of remote computers on the Remote Computers page in Site Administration

3. To reject one or more setup requests, do the following:
   a) Select the check box for each setup request that you want to reject.
   b) Click **Reject**.

      For each rejected registration request, Site Administration sends an email message to the user who made the request, indicating that the request was rejected.

Tip: To view detailed information about a user who has requested to set up a remote computer, click the user's user name in the **User Name** column on the Approve Access Anywhere Requests page.

Viewing a list of remote Access Anywhere computers

If your WebEx service site has the Access Anywhere option, you can view a list of all the remote computers that users have set up for Access Anywhere. The list indicates

- Which computers are currently logged in to the Access Anywhere server and when the user logged it in
- Which computers that users are currently accessing remotely and when the user started the Access Anywhere session

To view a list of users' remote computers:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Access Anywhere**, and then click the **Remote Computers** link.

   The Remote Computers page appears, showing a list of the remote computers that users have set up for Access Anywhere.

Tip: To update the page with the most current information, click **Refresh**.

Ending a user's Access Anywhere session

If a user is currently accessing a remote computer, you can disconnect the remote computer from the user's local computer, thereby ending the Access Anywhere session.

To end a user's Access Anywhere session:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Access Anywhere**, and then click **Remote Computers**.

   The Remote Computers page appears, showing a list of the remote computers that users have set up for Access Anywhere.

If a user is currently accessing a remote computer, the date and time at which the user started the session appears in the **Session Began** column.

3. Select the check box for the computer for which you want to end an Access Anywhere session.
4. Click **Disconnect**.

   A confirmation message appears.
5. Click **OK**.

Removing a remote computer from a user's account

If a user has set up a remote computer for Access Anywhere, you can remove the remote computer from the user's account and your WebEx service site. Removing a remote computer from a user's account prevents any further remote access to that computer.

To remove a user's remote computer from a user's account:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Access Anywhere**, and then click **Remote Computers**.

   The Remote Computers page appears, showing a list of the remote computers that users have set up for Access Anywhere.

3 Select the check box for the computer that you want to remove from a user's account.

4 Click **Remove**.

A confirmation message appears.

5 Click **OK**.

14

Managing WebACD

If you want to…	See…
an overview on creating and updating queues	*Managing WebACD queues* (on page 181)
learn about the options for configuring a queue	*Options on the Configuration tab* (on page 184)
learn about adding or removing agents from a queue	*Options on the Users tab* (on page 186)
review options for adding or removing fields on the entry form your customers fill out	*Options on the Entry Form tab* (on page 187)
learn about adding a button that customers use to access your support URL	*Options on the Entry Link tab* (on page 191)
learn how to create rules for routing customers to agents	*Options on the Rules tab* (on page 192)
editing your personal queue	*Editing the personal queue* (on page 198)
an overview on creating the leave message form	*Managing leave message forms* (on page 201)

Managing WebACD queues

Use this procedure to set up or change WebACD (Web-based Automatic Call Distribution) queues for routing customer requests to agents. The tabs group the tasks into five areas. Setting up a queue involves:

- Configuring the queue (**Configuration** tab)–setting the hours of operation, determining how WebACD routes the requests, and other details. See *Options on the Configuration tab* (on page 184).
- Assigning agents to the queue (**User** tab)–From a list of all available agents, selecting agents who answer customer requests. See *Options on the Users tab* (on page 186).
- Designing the entry form (**Entry Form** tab)–Adding and arranging the fields that appear on the form customers fill out to request assistance. See *Options on the Entry Form tab* (on page 187).
- Designing the entry link (**Entry Link** tab)–Choosing the button style and wording that appear on the button customers click to contact. WebACD provides the html code, which you can place on your Web page. This link connects to the entry form.
- Constructing rules (**Rules** tab)–Setting up the rules for routing requests to agents. You create the rules based on the information you request on the entry form.

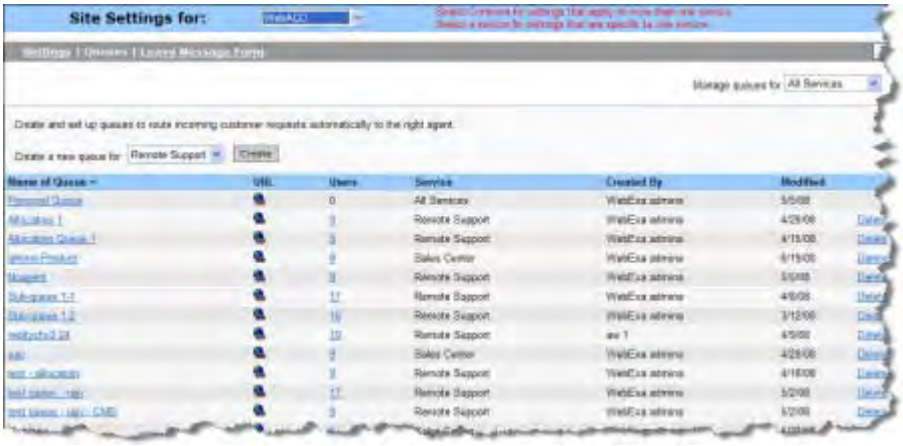
You can add more users and rules as you need them. You can start with a simple structure and add to it as your needs change.

If you've selected a queue to update, you can make the changes to information on any tab.

Creating a new queue

To create a new queue:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **WebACD**. The **WebACD Queues** page appears.



3 Click the **Create a new queue drop-down list** and select either **Remote Support** or **Sales Center**.

4 Click **Create**. The **Create New Queue** page appears**.**

5 Enter the information into the **Configuration** tab. See *Options on the Configuration tab* (on page 184).

6 Click **Next** at the bottom of the page or click on the **Users** tab.

7 Enter the information into the **Users** tab. See *Options on the Users tab* (on page 186).

8 Click **Next** at the bottom of the page or click on the **Entry Form** tab.

9 Enter the information into the **Entry Form** tab. See *Options on the Entry Form tab* (on page 187).

Options on the Configuration tab

Option	Description
Queue Information	
Service	WebACD displays the name of WebEx service for you
Name	Enter a descriptive name for this queue. This name displays on the queue list.
Description	Enter a brief description of the queue.
Queue Settings	
Features	"VoIP: WebACD reviews your configuration and selects VoIP if this option applies. Telephony: WebACD reviews your configuration and selects VoIP if this option applies ▪ Request from customer as soon as the session begins" From the list, select application or desktop sharing, co-browsing full control or view only. ▪ Open the following URL as soon as the session begins To save time, you can have WebACD display a Web site of your choice when the session starts. Enter that URL here. ▪ Auto-start voice call (VoIP) for this queue Automatically start a voice call for this queue. ▪ Enable Call Me Back Allow that customer can be called back by support agent.
While customer is waiting....	▪ Show the customer's queue position in the chat window Display the customer's position in the queue in the chat window. ▪ Show the customer's estimated wait time in the chat window Display estimated queue wait time is for this customer.
Hours of Operation	
Open	The queue is preset to accept requests 24 hours a day.
Open on	If you choose "Let me specify hours" option, you can select specific

Option	Description
	days and hours of operation.
Queue time zone	Your chat messages use this time zone for time stamps.
Request Distribution	
Request distribution	**Everybody**: No preset order for taking the call **Most Idle**: Person who has the longest elapsed period of inactivity receives the next request **Round Robin**: Calls are distributed to users based on a preset order.
Escalation threshold	For all queue types: ▪ You can set the number of seconds that elapse before the call is available to all agents. ▪ 60 seconds is the preset length of elapsed time. You can enter a longer or shorter time period (from 30 to 999 seconds).
Options	Select the check box: "Allow users to choose specific customers in the queue," to allow any agents to select a particular caller from a list of waiting customers.
Wait Notification	
Wait threshold	▪ You can set the number of minutes that a customer waits before agents are notified (by email message or phone call). ▪ 2 minutes is the preset length of waiting time. You can enter a longer or shorter time period (from 1 to 99 minutes).
Notification options	**Send email to:** Enter the email addresses of those you want to receive email notification. To save time, click the **List of Users** button and select the addresses from a list.
Leave Message Threshold	
Leave message form	Select the form you want customers to use to leave a message for your team.
Wait threshold	▪ You can set the number of minutes that elapse before the email message is sent to the list of agents you select. ▪ 5 minutes is the preset length of waiting time. You can enter a longer or shorter time period (from 1 to 99 minutes). The length of time you set is also used as the interval for time-outs.
Notification options	**Send email to:** Enter the email addresses of those you want to notify when a customer sends an email form. To save time, click the **List of Users** button and select the addresses from a list.

Option	Description
Form forwarding	**Send completed forms to:** Enter the email addresses of those you want to receive email notification. To save time, click the **List of Users** button and select the addresses from a list
Shutdown Threshold	
	▪ You can set the maximum number of customers that can wait in the queue before the queue shuts down. ▪ 200 is the default number of waiting customers. You can enter a larger or smaller number (from 50 to 999)
Unavailability Threshold	
	▪ You can set the number of seconds that elapse before WebACD prompts an agent to set his or her status to "Unavailable." ▪ 30 seconds is the default length of waiting time. You can enter a longer or shorter time period (from 30 to 120 seconds).

Options on the Users tab

Add and remove users from the list of agents assigned to this queue.

Option	Description
Search	To locate a particular user, type the email or name (or portion of the name) in the box. The results appear in the Search Results box. You can also search by email address.
Show All	To display the names of all users, click Show All.
Assign	In the Search Results box, select a name and click Assign to add this user to the list of users assigned to this queue. Use CTRL + click to select several names at once.
Remove	In the Assigned to Queue box, select a name and click Remove to remove this user from the list of agents assigned to this queue. Use CTRL + click to select several names at once.
Select All	If you want to select all users, you can save time by selecting the Select All check box.
Set other option	If you want to automatically assign all users to this queue, select the Automatically assign all users to this queue check box.

Options on the Select Users page

You can route notifications to particular users for queues by selecting them from the User List.

To select users for a queue:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **WebACD**. The **WebACD Queues** page appears.
3. Click on the link under **Name of Queue** to select an existing queue to edit or click **Create** to create a new queue (see *Creating a new queue* (on page 182)).
4. Click the **List of Users** icon to open the Select Users page.
5. Select the type of user from the drop-down list.
6. To locate a particular user, type the email or name (or portion of the name) in the box. The results appear in the Search Results box. You can also search by email address.
7. Select the users you want to receive notifications and click **Add Selected**.

Option	Description
Agents and Managers drop-down list	Select the agents, managers, or both to list on this page
Search field	Enter the email address or name for which to search on this page and then click Search. You can also use the alphabetical links to find the information.
Name	Select which person to assign to the customers
Email Address	Lists the email address of the manager of agent
Add Selected button	Click to select the user you have chosen

Options on the Entry Form tab

The fields you select or add on the Entry Form tab appear on the forms customers submit when they request assistance. WebACD provides these fields on the Entry Form tab:

- first name
- last name
- email address
- phone number

WebACD requires that the customer provide his or her first name, last name, and email address. You may already have these (and other details) about a customer stored in a profile. If you can supply this information about the customer in the html you send to the server, you do not have to display these fields and require the customer to fill them in. You must provide the correct parameters to WebACD.

WebACD requires some basic information about the customer. You do not have to request these details directly from the customer, if you have customer information stored (for example, in a profile) and have a mechanism for providing these details to WebACD.

You also use these field names later, if you set up rules for routing requests. For details about setting up rules, see *Using Routing Rules* (on page 193). Rules allow you to route requests to specific agents, based on the information the customer provides on this form. Later, create reports to track problems reported by customers and the response by members of your support organization.

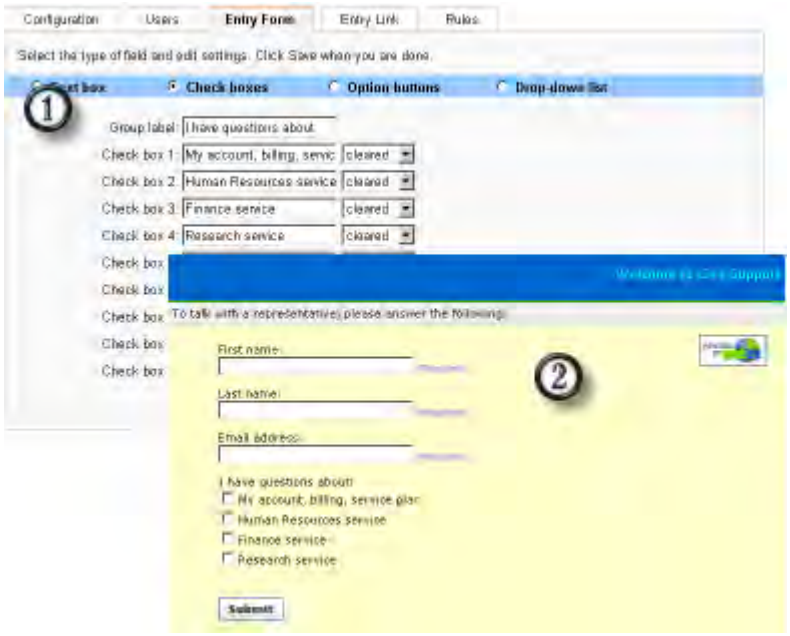
Example: Your support group assists customers of Bay City Software. You handle general calls about signing in, problems with accounts, and so on. The group also handles questions about the three services in the enterprise version of the software suite:

- human resources
- finance
- research

You can add fields to the entry form that help the customer narrow his or her problem. You select how WebACD displays these choices to customers:

- in a text box
- as check boxes

- as option buttons
- in a drop-down list



1) You set up the fields that appear on the request form customers submit.

2) The form that displays to customers or clients

Tip: Select the fields with care. On the **Rules** tab, you can use the required fields (and those you add) to set up rules for routing requests to the appropriate agent or agents. For details, see *Options on the Rules tab* (on page 192) and *Using Routing Rules* (on page 193).

Adding new fields to the entry form

You can tailor the entry form to capture exactly the information you need. You can have customers provide details about the problem or issues found in your product or service. You route the forms to the person best equipped to take the call.

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **WebACD**.
3. Under the **Name of Queue** column, click the link for the queue you want to update.
4. Click the **Entry Form** tab.
5. To add one or more new fields, click **Add New**.

For details about the types of fields you can add, see

- *Text Box Options* (on page 206)
- *Check Boxes Options* (on page 207)
- *Option Button Options* (on page 207)
- *Drop-Down List Options* (on page 208)

6 Click **Save** to save the entry form and any other changes you have made to this queue.

Rearranging fields on the entry form

You may want to change the order of the fields on the entry form such as grouping the fields together in a logical order.

To rearrange the fields:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **WebACD**.

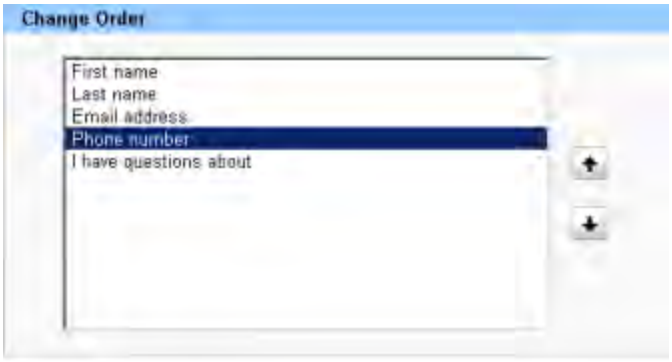
3 Under the **Name of Queue** column, click the link for the queue you want to update.

4 Click the **Entry Form** tab.

5 Click **Change Order**.

6 On the **Change Order** page, select a field you want to move.

7 Use the arrows to move the field up or down.



Select a field.

Use the arrow buttons to move the field up or down on the entry form

8 Click **Save** to save the new order and any other changes you have made to this queue.

9 Click **Next** at the bottom of the page or click on the **Entry Link** tab. See *Options on the Entry Link tab* (on page 191).

Options on the Entry Link tab

To select button options for queues:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **WebACD**.

3 Under the **Name of Queue** column, click the link for the queue you want to update.

4 Select the buttons you want to appear on the Web site where customers go to contact you for technical support when the queue is open and closed.

You can use your own graphic. Simply update the HTML code with the name of the graphic.

Option	Description
Select Button to Show When Queue is Open	Select the button style used for the link to support from your Web page when the queue is open.
Select Button to Show	Select the button style used for the link to support from your

Option	Description
When Queue is Closed	Web page when the queue is closed.
HTML Code	Copy and paste this code to your Web site. This code includes the image you selected for the button. If you prefer to use a button with your company's logo or branding, you can remove the reference to the image file in the html code and replace it with the name of your image.

5 Click **Save**. Click **Next** at the bottom of the page or click on the **Rules** tab. See *Options on the Rules tab* (on page 192).

Options on the Rules tab

You can assign agents to answer questions about a particular service or set of features. For instance, your support team fields questions dealing with:

- general account problems
- human resource service
- finance service

You can assign all agents cover general account problems, and selected agents to handle questions about your human resource service, another group to handle questions about the finance service, and so on. You set up *rules* to route customer requests to the most appropriate agents or queues.

You can set up two types of rules:

- Routing rules—rules for routing requests to specific agents
- Allocation rules—rules for routing requests to other queues

Important: Routing rules and allocation rules are mutually exclusive; that is, if you specify a routing rule for a queue, you cannot specify an allocation rule for the same queue.

Option	Description
Yes	For new queues, click **Yes** to add one or more rules
Create New Rule	For existing queues, click **Create New Rule** to change an existing rule or add a new one.
No	Click **No** if you do not want to set up rules at this time.

Option	Description
Rules	▪ For details about adding routing rules, see *Using Routing Rules* (on page 193) ▪ For details about adding allocation rules, see *Using Allocation Rules* (on page 195)

Using Routing Rules

Routing rules allow you to route customers efficiently to specific queues or users.

You can use the fields on the queue entry form for routing customer requests to particular agents assigned to a queue.

To set up or edit rules:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **WebACD**.
3. Under the **Name of Queue** column, click the link for the queue you want to update.
4. Click the **Rules** tab.
5. Click **Create New Rule or** select a rule from an existing queue to edit.

   The first set of fields for creating a rule appear.
6. Set up an "IF" statement.
   - Select a word or phrase from the first drop-down list. The list includes all field names displayed on the entry form (for example, first name, last name, phone number, and all fields you created).
   - Select a condition from the second drop-down list (for example, contains, less than, or greater than).
   - Enter text in the third drop down list, to complete this "IF" statement.
   - Select from lists and enter text here.

7 (Optional) Click the **Plus** button to add more "IF" statements.

The first "true" If statement is executed.

8 Set up the "THEN assign to" statement.

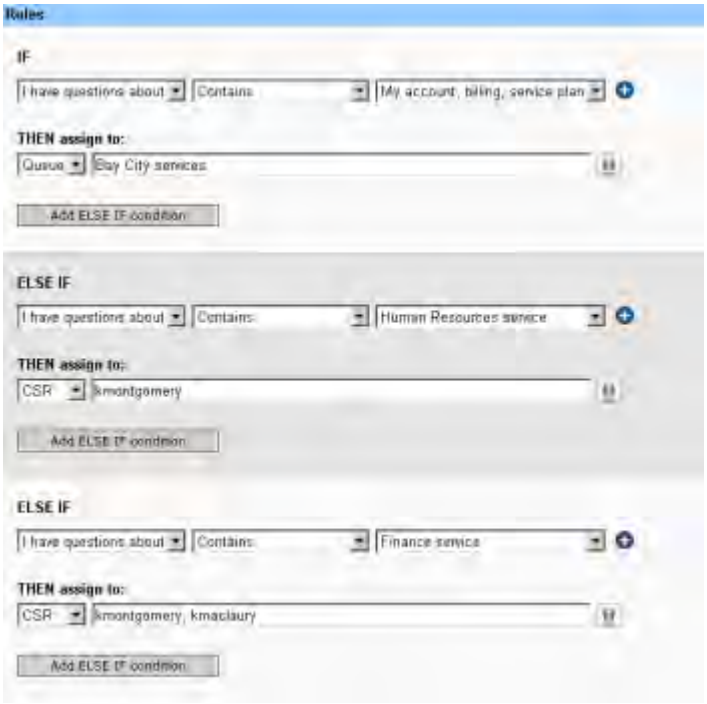
- To assign to a specific agent, type the email address or use the address book to find the address.
- To assign to all queue agents, select Queue from the drop-down list.

9 (Optional) Set up an "ELSE IF" statement by selecting **Add ELSE IF condition** button.

Select the conditions and other elements, as you did for the "IF" statements.

10 After you set up all the statements and conditions, click **Save**.

WebACD provides the final "Else" statement, which applies to all agents assigned to the queue.



Using Allocation Rules

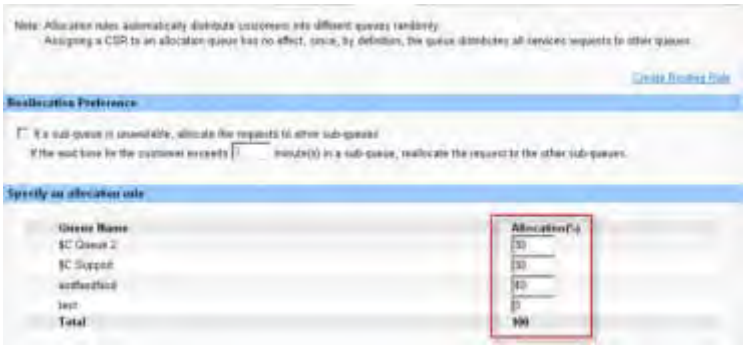
Allocation rules automatically distribute customer requests into specified queues. The queues specified for reception of these requests are called "subqueues."

You can use the fields on the Rules tab for routing customer requests to particular subqueues.

To create or edit an allocation rule:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **WebACD**.
3. If you want to create a new queue from the scratch, click **Create** to open the **Create New Queue** screen.
4. If you want to edit an existing queue, click the link for the queue you want to update under the **Name of Queue** column.
5. Click the **Rules** tab.

6 Click **Create New Allocation Rule** or click **Edit** to edit the existing allocation rule.



7 Optional. Select the checkbox under Reallocation Preference if you want requests to one subqueue to be reallocated to another subqueue if the original subqueue is unavailable.

8 Optional. Enter a number in minutes that a request can linger in a subqueue without being attended to before being reallocated to another subqueue.

9 Specify the allocation of requests to available queues:

- You can allocate all (100%) of requests to one queue or allocate all requests over a number of queues, for example, 30% to one queue, 30% to a second queue, and 40% to a third queue.
- The **Total** allocation must add up to no more or less than 100%

Rules options

Option	Description
Routing Rules	
Create Allocation Rule link	Click to change the Rules tab view to set up allocation rules.
IF	
(word or phrase) drop-down list	Select the word or phrase from the field names displayed on the entry form (for example, first name, last name, phone number, and all fields you created)
(condition) drop-down list	Select a condition (for example, contains, less than, or greater than)

Option	Description
text field	Enter text to complete the "IF" statement
	Click the **Add** button to add more "IF" statements. The first "true" If statement is executed.
	Click the **Delete** button to remove an "IF" statement.
THEN assign to	
CSR selected in drop-down list	To assign to a specific agent, type the email address or click the Address Book button to find the address
Queue selected in drop-down list	To assign to all queue agents, select Queue from the drop-down list
	▪ For CSR, click the **Address Book** button to open the Select Users page. ▪ For Queues, click the **Address Book** button to open the Select Queues page.
Add ELSE IF condition	Set up an "ELSE IF" statement by selecting **Add ELSE IF condition** button. Select the conditions and other elements, as you did for the "IF" statements
Allocation Rules	
Create Routing Rule link	Click to change the Rules tab view to set up routing rules.
Reallocation Preference	
Checkbox	Selecting this checkbox enables requests to be moved to other subqueues specified in the allocation rule if the current subqueue is unavailable
wait time	Entering a wait time enables a request to be reallocated to another subqueue if the wait time for responding to the request exceeds the specified time interval.
Queue Name	Provides a list of available queues to receivie requests
Specify an allocation rule	
Allocation (%)	Enter a percent (up to 100%) of requests that can be allocated to the named queue. You can allocate 100% to one queue or break out the allocation over two or more queues.
Total	An allocation rule must total no more or less than 100%

Select Queue options

Option	Description
Queue	Select which queue to route the customers
Agents	Select the number of agents in the queue
Description	Lists the description of the queue
Service	Lists whether the queue is for Remote Support or Sales Center
Select button	Click to select the queue you have chosen

About the personal queue

Each agent has a personal queue. An agent can give a customer or client the URL to this personal queue as a means of following up on unresolved issues. The personal queue has these features:

- All personal queues share the same entry form
- Changes to this entry form affect all agents
- As with other entry forms, you can add and remove fields to the personal queue entry form
- Neither the administrator nor the agent can delete the personal queue. It always appears on the list of queues
- WebACD Inbox dynamically creates a unique URL for each agent's personal queue

Editing the personal queue

For the personal queue, you can make some configuration changes and add or remove fields on the personal queue entry form.

To edit the personal queue:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **WebACD**.

3 Under the **Name of Queue** column, click the link for the queue you want to update.

What you can do on this page

Edit the personal queue. The tabs group the editing tasks into three areas:

- Configuring the queue (**Configuration** tab)–setting the wait thresholds and other options. See *Options on the Configuration tab (personal queue)* (on page 199).
- Designing the entry form (**Entry Form** tab)–Adding and arranging the fields that appear on the form customers fill out to request assistance. See *Options on the Entry Form tab* (on page 187).
- Designing the entry link (**Entry Link** tab)–Choosing the button style and wording that appear on the button customers click to contact. WebACD provides the html code, which you can place on your Web page. This link connects to the entry form.

Note these items, which you cannot change:

- Queue name: It must remain "personal queue"
- Queue description: It must remain "personal queue"
- Start and end times: This queue is available 24 hours a day (7:30 am to 7:30 am)
- Time zone: It must remain in Pacific Standard Time

Options on the Configuration tab (personal queue)

Option	Description
Queue Settings	
Features	"VoIP: WebACD reviews your configuration and selects VoIP if this option applies. Telephony: WebACD reviews your configuration and selects VoIP if this option applies ▪ Request from customer as soon as the session begins" From the list, select application or desktop sharing, co-browsing full control or view only.

Option	Description
	▪ Open the following URL as soon as the session begins To save time, you can have WebACD display a Web site of your choice when the session starts. Enter that URL here. ▪ Auto-start voice call (VoIP) for this queue Automatically start a voice call for this queue. ▪ Enable Call Me Back Allow that customer can be called back by support agent.
Hours of Operation	
Open	The queue is preset to accept requests 24 hours a day.
Open on	If you choose "Let me specify hours" option, you can select specific days and hours of operation.
Queue time zone	Your chat messages use this time zone for time stamps.
Leave Message Threshold	
Leave message form	Select the form you want customers to use to leave a message for your team.
Wait threshold	▪ You can set the number of minutes that elapse before the email message is sent to the list of agents you select. ▪ 5 minutes is the preset length of waiting time. You can enter a longer or shorter time period (from 1 to 99 minutes). The length of time you set is also used as the interval for time-outs.
Notification options	**Send email to:** Enter the email addresses of those you want to notify when a customer sends an email form. To save time, click the **List of Users** button and select the addresses from a list.
Form forwarding	Enter the email addresses of those you want to receive email notification. To save time, click the **List of Users** button and select the addresses from a list.
Shutdown Threshold	▪ You can set the maximum number of customers that can wait in the queue before the queue shuts down. ▪ 200 is the preset number of waiting customers. You can enter a larger or smaller number (from 50 to 999)
Unavailability Threshold	You can change the user unavailable status if no response is

Option	Description
	received within the time specified.

Managing leave message forms

WebACD displays the leave message form for customers in a queue:

- When the queue is closed (after hours)
- When no one is available to monitor and handle requests in the queue
- When a request times out

WebACD provides a default form, which you can update or edit. This form is always available and is assigned automatically to any queue that you have not explicitly attached a particular form.

How to access this page:

To create a new form:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **WebACD**.
3. Click on the **Leave Message Form** link on the Queues page.
4. Click **Create New Form**.

To edit a queue:

Under **Name of Form**, click the link for the form you want to edit.

What you can do on this page

Set up or edit the form that displays when no agents are available to respond to a customer request. Creating or editing a form involves:

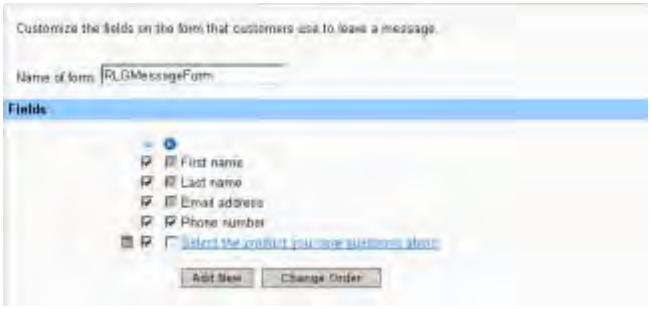
- Adding the details you want to include on the form (**Create New Form** or **Edit Form**)–You can use the preset fields or add additional fields, to refine the customer's request. See *Create New/Edit Form Page Options* (on page 204).
- Assigning this form to a queue (**Assignment** tab)–From the list of all queues, you select which form you want to apply to each queue. See *Assigning a leave message form to a queue* (on page 208).

How WebACD uses the information customers enter

The fields you select or add on the Entry Form tab appear on the forms customers submit when they request assistance. WebACD provides these fields on the Entry Form tab:

- first name
- last name
- email address
- phone number

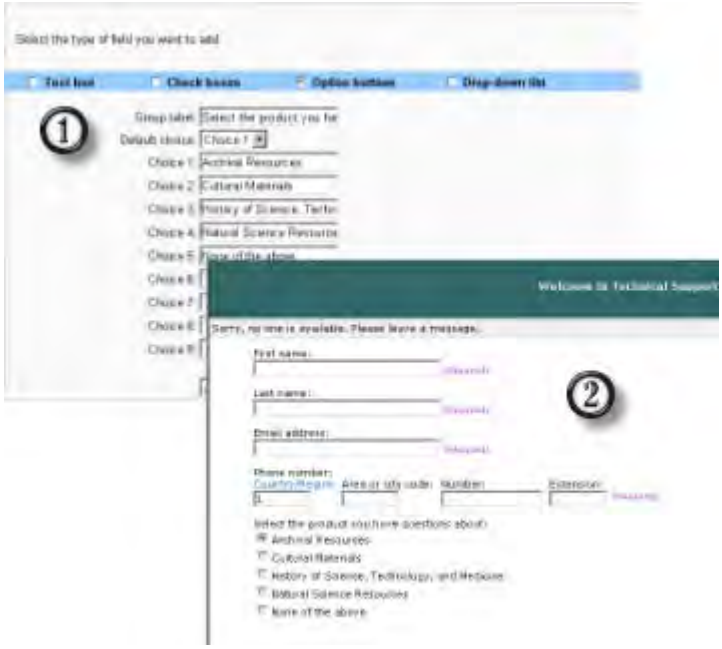
WebACD requires that the customer provide his or her first name, last name, and email address. You may already have these (and other details) about a customer stored in a profile. If you can supply this information about the customer in the html you send to the server, you do not have to display these fields and require the customer to fill them in. You must provide the correct parameters to WebACD.



WebACD requires some basic information about the customer. You do not have to request these details directly from the customer, if you have customer information stored (for example, in a profile) and have a mechanism for providing these details to WebACD.

You can add fields to the leave message form that help the customer narrow his or her problem. You select how WebACD displays these choices to customers:

- in a text box
- as check boxes
- as option buttons
- in a drop-down list



1) You set up the fields that appear on the request form customers submit.
2) The form that displays to customers or clients

Adding new fields to the leave message form

You can tailor the leave message form to capture exactly the information you need. You can have customers provide details about the problem or issues found in your product or service. You route the message forms to the person best equipped to take the call.

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **WebACD**.
3. Click on the **Leave Message Form** link on the Queues page.
4. Under **Name of Form**, click the link for the leave message form you want to update.

   The **Edit Form** page appears.

5 Add one or more new fields.

For details about the types of fields you can add, see

- *Text Box Options* (on page 206)
- *Check Boxes Options* (on page 207)
- *Option Button Options* (on page 207)
- *Drop-Down List Options* (on page 208)

6 Click **Save** to save the entry form and any other changes you have made to this queue.

Create New/Edit Form Page Options

Option	Description
Name of Form	Enter or edit the name of the form
☑	Click the check box to display the field on the form.
ⓡ	Click the check box to require that the field be filled in on the form.
Fields	Enter the following required information: ▪ First name ▪ Last name

Option	Description
	▪ Email address ▪ Phone number
Add New button	Click to open a page where you can add new fields to the form.
Change Order button	Click to change the order of the fields on the form.
Save button	Click to save the form.

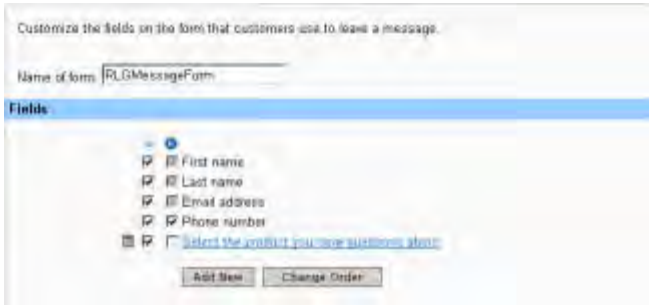
Rearranging fields on the leave message form

You may want to change the order of the fields on the leave message form, perhaps grouping the fields together in a logical order.

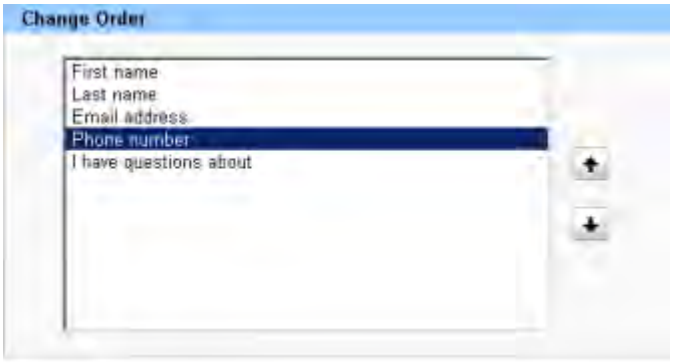
To rearrange the fields:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **WebACD**.
3. Click on the **Leave Message Form** link on the Queues page.
4. Under **Name of Form**, click the link for the leave message form you want to update.

   The **Edit Form** page appears.



5. Click **Change Order**.
6. On the **Change Order** page, select a field you want to move.
7. Use the arrows to move the field up or down.
8. Select a field.
9. Use the arrow buttons to move the field up or down on the entry form.



10 Click **Save** to save the new order and any other changes you have made to this queue.

Change Order Options

Option	Description
Form fields	Highlight the field that you want to move.
	Move the highlighted field up on the form.
	Move the highlighted field down on the form.
Save button	Click to save the order.

Text Box Options

Customers enter a free-form description of the problem or issue that concerns them.

Option	Description
Single line	Select to provide one line for customers to enter information.
Multi-line	Select to provide more than one line for customers to enter information.
Text box label	Enter a phrase that introduces the text box. *Example:* You want customers to type the service or product they are contacting you about. Enter this text as the label: Type the name of product you need help with.

Option	Description
Width	Enter the number of characters customers may enter in the text box.
Height	Enter the number of lines of text that the customers may enter in the text box.
Save button	Click to save the option.

Check Boxes Options

Customers select one or more check boxes in the list of boxes that you set up here.

Option	Description
Group label	Enter a phrase that describes the list of check boxes *Example:* You want customers to type the service or product they are contacting you about. Enter this text as the label: Type the name of product you need help with.
Check box	For each check box you want to add, type a description and select whether you want this check box to be preset as selected (checked) or cleared (blank).
Add additional check boxes	If you need to include more than nine check boxes on the entry form, select how many more check boxes you need.
Save button	Click to save the option.

Option Button Options

Customers select one option in the list of options you set up here.

Option	Description
Group label	Enter a phrase that describes the list of options *Example:* You want customers to type the service or product they are contacting you about. Enter this text as the label: Type the name of product you need help with.
Default choice	Select one option as the preset.
Choice	For each option you want to add, type a description.
Add additional choices	If you need to include more than nine options on the entry form, select how many more options you need.

Option	Description
Save button	Click to save the option.

Drop-Down List Options

Customers select one item in the drop-down list you set up here

Option	Description
Group label	Enter a phrase that describes the items on the drop-down list. *Example:* You want customers to type the service or product they are contacting you about. Enter this text as the label: Type the name of product you need help with.
Default choice	Select one list item as the preset.
Choice	For each list item you want to add, type a description
Add additional choices	If you need to include more than nine options on the entry form, select how many more options you need.
Save button	Click to save the option.

Assigning a leave message form to a queue

1. On the Site Settings drop-down list, select **WebACD**. Click **Leave Message Form**.
2. Click the **Assignment** tab.
3. Under **Name of Queue**, locate the queue you want to update.
4. In the Leave Form drop-down list, select the form you want to assign to the queue.
5. Click **Save**.

15

Viewing Reports

If you want to…	See…
view a session usage report	*Viewing usage reports* (on page 209)
view a media storage usage report	*Viewing recording storage usage report* (on page 210)
view a storage utilization by user report	*Viewing storage utilization by user reports* (on page 211)
view an Access Anywhere report	*Viewing Access Anywhere reports* (on page 211)
view Sales Center reports	*Viewing Sales Center reports* (on page 212)
view Training Center usage report	*Training Center Reports* (on page 218)
using Event Center report builder	*Using Event Center Report Builder* (on page 220)

Viewing usage reports

Use this procedure to view reports that show information about sessions conducted on your site and people who attended those sessions.

To run usage reports:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. Click **Reports**.
3. Click **Usage Report**.
4. To run a report about the meetings a specific user hosted, at **User Name** enter the user's user name.

5 Select the beginning and ending dates for the report.

Note: Report data is only available for sessions conducted up to three months before today's date.

6 To view a report for only certain session topics, in the **Topic** box, enter all or part of the topic name.

Tip: You can use wildcards, such as ? or *, when specifying a text string.

7 To sort the report by date, topic, user name, or start time, at **Sort results by** select the desired sort criteria.

8 Click **Display Report**.

9 To export the report in CSV format so that you can import it into a spreadsheet or other program, at **Export CSV Reports**, do one or both of the following:

- To export the Summary Usage report to a CSV file, click **Session Summary**.
- To export the Attendee Detail report for all sessions on the Summary Usage Report page to a CSV file, click **Attendee Details**.

Viewing recording storage usage report

Use this procedure to view reports that show information about recording usage for WebEx Recorder.

To run recording storage usage reports:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 Click **Reports**.

3 Click **Recording Storage Usage Report**.

4 To run a report about the meetings a specific user hosted, at **Host User Name** enter the host user name.

5 Select the beginning and ending dates for the report.

Note: Report data is only available for sessions conducted up to three months before today's date.

6. To sort the report by date, topic, user name, or start time, at **Sort results by** select the desired sort criteria.
7. Click **Display Report**.
8. To export the report in CSV format so that you can import it into a spreadsheet or other program, at **Export CSV Reports**, do one or both of the following:
   - To export the Summary Usage report to a CSV file, click **Session Summary**.
   - To export the Attendee Detail report for all sessions on the Summary Usage Report page to a CSV file, click **Attendee Details**.

Viewing storage utilization by user reports

Use this procedure to view reports that show information about storage usage for WebEx Recorder for download only in Excel format.

To run media storage usage reports:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. Click **Reports**.
3. Click **Storage Utilization by User Report**.
4. Click **Open** to open the report in .CSV format. Click **Save** to save the report to your computer.

Viewing Access Anywhere reports

Use this procedure to view reports that show information about Access Anywhere sessions.

To view an Access Anywhere report:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Access Anywhere**, and then click **Reports**.
3. Select the beginning and ending dates for the report.

Note: Report data is only available for sessions conducted up to three months before today's date.

4. In **Sort results by** drop-down list, select an option by which to sort the sessions in the report.

   You can sort by computer name, client IP address, date, session starting time, session ending time, or session duration.

5. Click **Display Report**.

   The Access Anywhere Report page appears.

6. To export the report in CSV format so that you can import it into a spreadsheet or other program, click **Export Report**.

7. To print the report, click **Printer-Friendly Format**.

Viewing Sales Center reports

Sales Managers can view all of the following in-bound meeting reports on the **MyWebEx> Reports** page:

- Session Query
- CSR activity
- Call Volume
- URL Referral
- Allocation Queue

Sales team members can view CSR Activity and Allocation Queue reports on the **MyWebEx> Reports** page.

To view in-bound meeting reports:

1. On the navigation bar under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Sales Center**.
3. Click the **In-bound Meeting Report** link. The Reports page appears.

4 Click on the report you want to run.

Report	See...
Session Query Tool—to report on session information for selected queues or CSRs.	*Session Query Tool* (on page 213)
CSR Activity—to report on CSR activity.	*CSR activity report* (on page 214)
Call Volume—to report on the number of incoming and outgoing requests.	*Call Volume report* (on page 215)
URL Referral—to report on URL referrals.	*URL Referrals report* (on page 216)
Allocation Queue—to report on activity per planned queue allocation.	*Allocation Queue report* (on page 217)

Session Query Tool

To view a report on session information for selected queues or CSRs:

1 On the navigation bar under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **Sales Center**.

3 Click the **In-bound Meeting Report** link.

4 On the Reports page, click the **Session Query Tool** button. The Session Query Tool page appears.

5 Select the information you want to display on the report.

6 Do one of the following:

- Click **Display Report** to display the report. From the report results, you can choose to print or export the report to CSV.
- Click **Export to CSV** to export the report data into a CSV (comma separated value) file. Name and select where you want to save the file.

CSR activity report

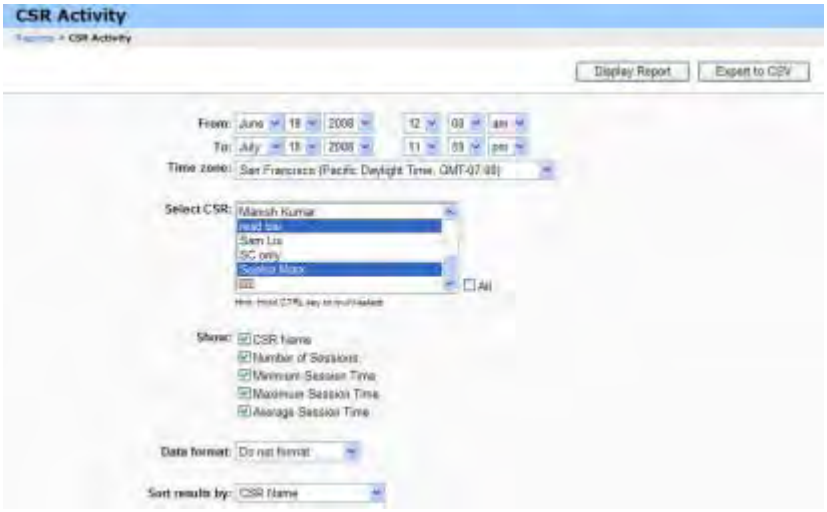
To view a report on CSR activity:

1 On the navigation bar under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **Sales Center**.

3 Click the **In-bound Meeting Report** link.

4 On the Reports page, click the **CSR Activity** button. The CSR Activity page appears.



5 Select the information you want to display on the report.

6 Do one of the following:

- Click **Display Report** to display the report. From the report results, you can choose to print or export the report to CSV.
- Click **Export to CSV** to export the report data into a CSV (comma separated value) file. Name and select where you want to save the file.

Call Volume report

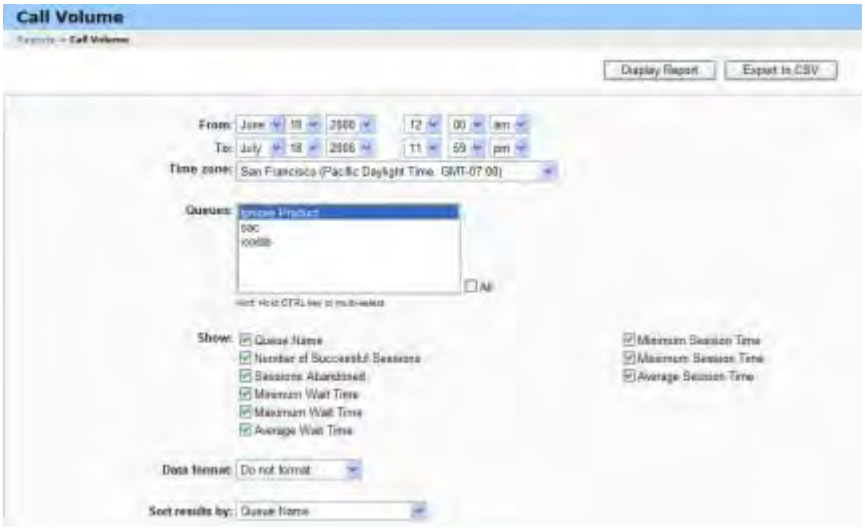
To view a report on CSR activity:

1 On the navigation bar under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **Sales Center**.

3 Click the **In-bound Meeting Report** link.

4 On the Reports page, click the **Call Volume** button. The Call Volume page appears.



5 Select the information you want to display on the report.

6 Do one of the following:

- Click **Display Report** to display the report. From the report results, you can choose to print or export the report to CSV.
- Click **Export to CSV** to export the report data into a CSV (comma separated value) file. Name and select where you want to save the file.

URL Referrals report

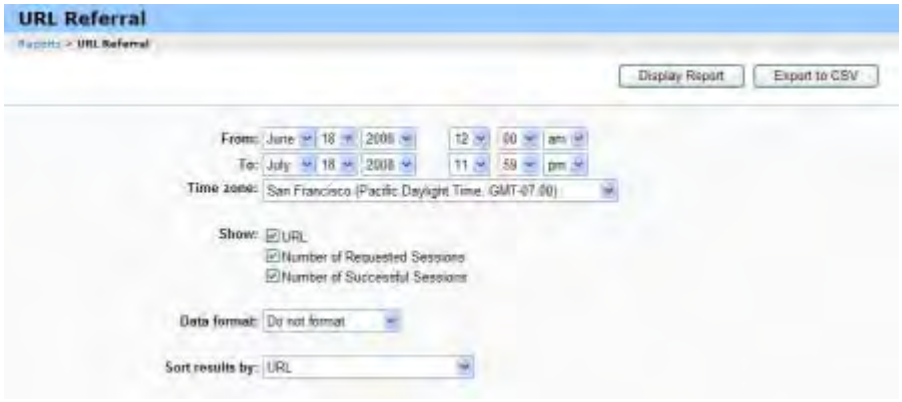
To view a report on URL Referrals:

1 On the navigation bar under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **Sales Center**.

3 Click the **In-bound Meeting Report** link.

4 On the Reports page, click the **URL Referral** button. The URL Referral page appears.



5 Select the information you want to display on the report.

6 Do one of the following:

- Click **Display Report** to display the report. From the report results, you can choose to print or export the report to CSV.
- Click **Export to CSV** to export the report data into a CSV (comma separated value) file. Name and select where you want to save the file.

Allocation Queue report

To view a report on Allocation Queues:

1 On the navigation bar under **Manage Site**, click **Site Settings**.

2 In the **Site Settings for** drop-down list, select **Sales Center**.

3 Click the **In-bound Meeting Report** link.

4 On the Reports page, click the **Allocation Queues** button. You must first create allocation queues to run this report. The Allocation Queues page appears.

5 Select the information you want to display on the report.

6 Do one of the following:

- Click **Display Report** to display the report. From the report results, you can choose to print or export the report to CSV.
- Click **Export to CSV** to export the report data into a CSV (comma separated value) file. Name and select where you want to save the file.

Training Center Reports

How to access this page:

1 On the navigation bar, under **Manage Site**, click **Site Settings**.

2 Select **Training Center** in the **Site Settings for** drop-down list.

3 Click **Reports.** Select one of the following Training Center reports:

Report	Description
Usage Report	To view usage information for all sessions.

Report	Description
Registration Report	View all registration information for all sessions scheduled and in the past.
Recorded Session Access Report	View all recorded sessions access across all recorded sessions.
Coupon Report	View details of coupons issued and used.
Training Report by Attendee	View training information for all sessions for which a person has registered or attended.

4 Specify search criteria, and then click **Display Report**.

What you can do on this page:

- View a summary list of training sessions that meet your search criteria.
- Download a Session Summary report for all the training sessions that meet your search criteria.
- Navigate to the Detail Session Report for a training session.

Fields on this page:

Option	Description
Topic	The topic for a training session. Click its link to view the **Session Detail Report** for the session.
[Tracking Code]	Indicates tracking code values for the training sessions. If the training sessions used multiple tracking codes, each tracking code name appears as a column header.
User Name	The user name of the host of a training session. Click the name's link to view the **Edit User** page for the host in Site Administration.
Date	The date on which the training session occurred.
Start Time	The time at which the host started the training session.
Duration	The duration of the training session, in minutes.
Invited	The total number of attendees whom the host invited to the training session, using the session scheduling page.
Registered	The total number of attendees who registered for the training session. If the host did not require registration for the session,

Option	Description
	the text N/A appears in this column.
Attended	The total number of participants in the training session, including the host.
Absent	The number of participants who registered for the training session, but did not attend the session.
Tele	Indicates whether or not the host used one of the following integrated WebEx voice conferencing services: Internet phone, call-in teleconference, call-back teleconference, toll-free call-in teleconferencing, or toll-free international teleconferencing.

Options on this page:

Option	Description
Search again	This link navigates to the Training Center Usage Report query page to let you search again.
Printer-friendly format	Displays the report in a format that you can print.
Export Report	Downloads a CSV (comma-separated values) file that contains detailed information about all training sessions that appear on the Training Center Usage Report summary page.

Using Event Center Report Builder

Report Builder lets you to create reports about the events and programs on your Event Center Web site and about the people who have attended or enrolled for the events, or viewed recorded events.

The reports that you create and save appear on the Event Center Reports Dashboard page in Site Administration. You can view, edit, or delete them at any time. You can also download a report to a file in either the CSV (comma-separated values) or XML format.

To create a report, you must specify the search criteria that Site Administration uses to retrieve information for the report. You can create the following types of reports using Report Builder:

- **Program Report:** Contains information about programs users have created on your Event Center Web site. It can provide information such as

the program name, program URL, status, and budget. The report can also provide statistics, such as the total number of events, enrollees, attendees and viewers of recorded events in the program.

- **Event Report:** Contains information about events users have hosted on your Event Center Web site. It can provide information such as the program an event belongs to, event name, status, and tracking codes. The report can also provide statistics, such as the total number of pending, rejected, and approved enrollees in an event.
- **Attendee/Enrollee/Viewer Report:** Contains information about the people who attended or enrolled for events on your Event Center Web site, such as their names and email addresses and the times they joined or left an event.

Opening Report Builder

To create a new report, you must open Report Builder.

To open report builder:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.
2. In the **Site Settings for** drop-down list, select **Event Center**, and then click **Reports**.
3. Scroll down if required and click **Create New Report**.

   The **New Report - Step 1** page appears, displaying the first step in creating a report.

Creating an Event Center report

You can create one of the following types of reports using Event Center Report Builder:

- **Program**
- **Event/Recording**
- **Registrant/Attendee/Recording Download**

To create a report:

1. Open Report Builder. For details, see *Opening Report Builder* (on page 221).

2 In the **Report name** field, type a name for the report.

3 In the **Description** field, type a description for the report.

4 From the **Report category** drop-down list, select the type of report you want to create:

- **Program**
- **Event/Recording**
- **Registrant/Attendee/Recording Download**

5 If applicable, select the **Sub Type** for the report.

Note: The Sub Type drop down list appears only for the **Registrant/Attendee/Recording Download** report**.**

6 Select the other appropriate items based on the report type you are creating and click **Next**.

The **Step 2** page appears. On this page you can sort the order of the selected fields.

7 Optional. Change the order of the fields that appear on the report. For details, see *Sorting the order of report fields* (on page 223).

8 Click **Next**.

Note For Program and Event reports: The **Step 3** page appears. Some of the fields you have selected in the earlier steps will appear. You can use these as filters to refine your report.

9 Specify the criteria you want.

For details about how to specify the criteria, see *Refining your report query* (on page 223).

10 To preview your report, click **Preview Report**.

The **Preview Report** page appears, showing information in the report according to the options that you have selected.

Note: On the **Preview Report** page, you can do the following:

- Download the report to either a comma-separated values (CSV) file or an XML file. See .*Downloading Event Center reports* (on page 225).
- Edit the report to specify different fields, change the sort order, and so on. See *Editing Report Builder reports* (on page 226).
- Save the report on your Site Administration site. See *Saving Event Center reports* (on page 224).
- Delete the report. See *Deleting Event Center reports* (on page 226).

Sorting the order of report fields

When creating or editing a report using Event Center Report Builder, you cansort order of the fields you have selected.

To sort order of fields:

1. In Report Builder, on the Step 2 page, select the field by which you want to sort your report in the **Sort by** drop-down list.

   The drop-down list contains all the fields you have selected to display in the report in the first step.

2. Optional: Change the order in which the remaining fields appear in the report, as follows:

   a) In the **Order of fields** box, select a field for which you want to specify its order of appearance.

   b) The **Order of fields** box contains all the other fields, except the one you have selected in the **Sort by** drop-down list.

   c) To make a field appear to the left of another field in the report, click **Up**. To make a field appear to the right of another field in the report, click **Down**.

Refining your report query

When creating or editing a report using Event Center Report Builder, you can use specific fields that you selected to display in a report as filters to further refine your reports.

To refine your report query:

In Report Builder, on the Step 3 page, specify criteria for the fields, using the following options, as appropriate for the type of field:

- **Text box:** Type text for which you want to search. For example, in the **Program Name** text box, you can type all or part of a program name, and the report will display only those programs whose names contain that text.

  Wildcard expressions are not supported.
- **Date range drop-down list:** Select the first and last date for the date range within which you want to search.

Opening a saved Event Center report

You can view an existing Event Center report that you saved on your Site Administration site.

To open a saved Event Center report:

1. On the Event Center Reports Dashboard, scroll down to Saved Reports.
2. Under Report name, click the link for the report that you want to view.

   The Report page appears, showing the details of the report.

Note: On the Report details page, you can do the following.

- Download the report to either a comma-separated values (CSV) file or an XML file. See *Downloading Event Center reports* (on page 225).
- Edit the report to specify different fields, change the sort order, and so on. See *Editing Report Builder reports* (on page 226).
- Save a copy of the report on your Site Administration site. See *Saving Event Center reports* (on page 224).

Saving Event Center reports

You can save any report that you create using Event Center Report Builder. You can either save a report that you just created or save a copy of a previously saved report.

To save the report:

1. Do *one* of the following:
   - Create a new report. For details, see *Creating an Event Center report* (on page 221).

- Open a previously saved report. For details, see the topic *Opening a saved Event Center report* (on page 224).

2 Do *one* of the following:

- To save a report click **Save**.
- To save a copy of an existing report, click **Save as new report**.

The **Save Report** page appears.

3 In the **Report name** box, enter a name for the report.

4 In the **Description** box, enter a short description about the report.

5 Click **Save**.

Your saved report appears under **Saved Reports**.

Downloading Event Center reports

You can download to your computer any report that you created using Report Builder. You can save the downloaded report to either a comma-separated values (CSV) file or an XML file.

To download an Event Center report:

1 Do *one* of the following:

- Create a new report. For details, see *Creating an Event Center report* (on page 221).
- Open a previously saved report. For details, see the topic *Opening a saved Event Center report* (on page 224).

2 On the eport page, select one of the following file formats for the report from the **Format** drop-down list:

- CSV
- XML

3 Click **Download Report**.

A File Download dialog box appears.

4 Select **Save this file to disk**, and then click **OK**.

5 In the Save as dialog box, specify a location to save the report, and then click **Save**.

Editing Report Builder reports

Once you create an Event Center report using Report Builder, you can edit it to change any of the information you specified when creating the report.

To edit a report:

1. Do *one* of the following:
   - Create a new report. For details, see *Creating an Event Center report* (on page 221).
   - Open a previously saved report. For details, see the topic *Opening a saved Event Center report* (on page 224).
2. On the page, click **Edit**.
3. Follow the same process as you did when creating a report.For details about creating a report, see *Creating an Event Center report* (on page 221).

Deleting Event Center reports

You can delete an existing Event Center report that you saved on your Site Administration site, or a new report that you just created.

To delete a saved report:

1. On the navigation bar, under **Manage Site**, click **Site Settings**.

   The **Site Settings for Common** page appears.
2. In the **Site Settings for** drop-down list, select **Event Center**, and then click **Reports**.
3. Scroll down to **Saved Reports**.
4. Under **Report name**, select the check box for the report that you want to delete. Or, to delete all reports, click **Select All**.
5. Click **Delete**.

   A confirmation message appears.
6. In the message box, click **OK** to delete the saved report.

16

CSV File Format Reference

For details about the…	See…
CSV file format for user accounts	*CSV File Format for User Accounts* (on page 227)
CSV file format for contacts	*CSV File Format for Contacts* (on page 247)
CSV file format for tracking code values	*CSV File Format for Tracking Code Values* (on page 250)
Time Zones	*Time Zones* (on page 252)

CSV File Format for User Accounts

The following is an example of a comma-separated values (CSV) file that was formatted in Microsoft Excel. This example does not show all the possible fields for which you must provide values. You must create your own, company-specific CSV file template.

Notes and Considerations

- Before you import user account data in a CSV file, create a backup file of your existing user accounts, by exporting their data.
- All exports (report, user, contacts) are exported in Unicode tab-delimited text (UTF-16LE) format. All imports support CSV (for English data only) and Unicode tab delimited text (for non-English data and mixed language data.)
- A CSV file must include column headings at the top of the file. When creating a CSV file using a spreadsheet program, such as Microsoft Excel,

ensure that the column headings are in the first row of a spreadsheet. Column headings must appear exactly as specified under **Account-Information Fields** below.

- Some user account information is required, as specified under **Account-Information Fields** below. Thus, you must include all column headings for required fields. You need not include column headings for optional fields for which you do not provide user account information.
- To ensure that your CSV file contains all required column headings, in their proper format, WebEx strongly recommends that you create a CSV file template.
- The account-information fields in a CSV file are not case-sensitive. Thus, you can type values in either uppercase or lowercase letters, or a combination of both. However, the values that appear in the user's profile on your site—such as the user's name—will appear as you type them in the CSV file. Also users must type their default passwords exactly as you specify them in the CSV file to log in to their accounts.
- Refer to **Account-Information Fields** below for the correct format for user account information.
- Once you finish specifying user account information, ensure that you save the spreadsheet file as a CSV file.
- If you specify any information for a user account incorrectly, Site Administration cannot create that account. In this case, Site Administration generates a list of records for the accounts that it was unable to create, including the cause for each error. You can download a file containing these records to your computer for reference or to correct the errors directly in that file.
- If, after uploading a CSV file, you want to change information that you specified for one or more user accounts, you can edit accounts individually using **Site Administration>Edit User List**. Or, you can contact your WebEx account manager for assistance.

Creating a CSV File Template

1. On the navigation bar, under **Manage Users**, click **Import/Export Users**.
2. On the Batch Import/Export Users page, click **Export**. A message will display staying that your request is received. You will receive an email notification when the export process is complete.
3. Using the link in the email notification, open the file containing the data that you exported in a spreadsheet program, such as Excel.

4 If you want to only add new user accounts, delete any account data that the exported file contains. Deleting this data does not affect any existing accounts when you upload the CSV file to Site Administration.

Account-Information Fields

Field	Description
UserID	Indicates an identification number that WebEx database for Site Administration automatically generates for the account. **Important** ▪ If you are adding a new account, do not provide any information in this column. Site Administration generates this number after you upload the CSV file. Site Administration requires that this field be empty to create a new account. ▪ If you are editing an existing account, do not delete or modify this number. If you modify the number for an existing account, Site Administration creates a new user account, using the account data in that row. However, if required account data—such as a user name or email address—already exists for an account on your site, Site Administration cannot create the new account.
Active	Required. Specifies whether a user account is active or inactive—that is, whether the user can host WebEx meetings, training sessions, support sessions, or events, depending on your site type. This field can contain one of the following values: ▪ Y: The user account is active. ▪ N: The user account in inactive.
FirstName	Required. Specifies the first name of the user to whom this account belongs.
LastName	Required. Specifies the last name of the user to whom this account belongs.
UserName	Required. Specifies the identifier that the user to whom this account belongs uses to log in to your organization's WebEx service. User names: ▪ Must be unique ▪ Can consist of a maximum of 64 characters **Important** WebEx recommends that you do not create user names that include spaces or punctuation marks, except underscores, hyphens, and periods.

Field	Description
Password	Required. Specifies the password for the account. Passwords: ▪ Must contain at least four characters ▪ Can consist of a maximum of 32 characters ▪ Are case-sensitive—that is, users must type their passwords exactly as you specify them in this field ▪ Can be "****", which indicates to the Site Administrator not to change the password for an existing account. ▪ Create a new, random password for a new account. In this case, if you are using the option "Require Strict Password...", then the new password does not meet the password criteria, and the user is required to change the password the first time the user logs in. **Important** If, on the Site Settings for Common page, you selected the **Require strict password for new user accounts** option, and you are using a CSV file to create new user accounts, you must specify a default password for each account that complies with the strict password criteria you specified. Imported passwords in a CSV file can be changed, if proper password criteria is set in Site Security options.
Email	Required. Specifies the user's email address. A user's email address must be unique.

Field	Description
Language	Optional. Specifies the language that is selected by default on the user's Preferences page. This option determines the language in which text appears to the user on your meeting service Web site. Depending on which languages your site supports, this field contains one of the following numeric values, each of which corresponds to a language. The short name is listed next to the language name. **Locale - ID** U.S. - 2 Australia - 3 Canada - 4 French Canada - 5 China - 6 France - 7 Germany - 8 Hong Kong - 9 Italy - 10 Japan - 11 Korea - 12 New Zealand - 13 Spain - 14 Sweden - 15 Switzerland - 16 Taiwan - 17 United Kingdom - 18 Mexico 19 Argentina - 20 Chile - 21 Colombia - 22 Venezuela - 23 Brazil - 24 Portugal - 25

Field	Description
	Language - ID
	English - en-us
	Simplified Chinese - zh-cn
	Traditional Chinese - zh-tw
	Japanese - jp
	Korean - ko
	French - fr
	German - de
	Italian - it
	Spanish - es-me
	Swedish - sw
	Portuguese - pt-br

Field	Description
HostPrivilege	Required. Specifies the type of account that the user has. This field can contain the following account types: ▪ HOST: Specifies that the user has a host account. The user can log in to your organization's WebEx service to host meetings. ▪ ADMN: Specifies that the user has a site administrator account. The user can log in to your organization's WebEx service to host meetings and use Site Administration to administrate your WebEx service. **Important** A site administrator can manage user accounts, handle registration requests, and specify preferences for your organization's WebEx service. Therefore, WebEx recommends that your organization have only one or two site administrator accounts. ▪ ADMV: Specifies that the user has a view-only site administrator account. The user can log in to your organization's WebEx service to host meetings and use Site Administration to view user account information, registration requests, WebEx configuration and preferences, and meeting usage reports. However, a site administrator with view-only privileges cannot change user account information or settings for your organization's WebEx service. ▪ ATTD: Specifies that the user has an attendee account. The user can log in to your WebEx service to view a list of meetings to which he or she was invited and to attend meetings that require an account on your site. The user can also maintain a user profile. However, the user cannot host meetings on your site. **Note** The following information in the CSV file applies to attendee accounts. If you provide any other information in the CSV file, Site Administration ignores it. ▪ Whether the user account is active or inactive ▪ First name ▪ Last name ▪ Password ▪ Email address
MeetingPrivilege	Optional. Specifies which types of meetings the user can host. This field can contain one or more codes, with up three digits, that indicate the meeting types a user can host. **Note** ▪ To obtain a valid code for this field, refer to the index values under **Index** for the session types that are listed on the Site Administration Home page. However, if your site

Field	Description
	includes the Access Anywhere meeting type, do not type its code in this field. ▪ If any codes contain leading zeros, you need not type them. For example, if your meeting type code is 004, type only the digit 4 in this field. ▪ You can specify multiple meeting types for any user account, if your organization has the appropriate licenses. To specify multiple service types, separate them with commas, but without spaces—for example: 15,120 ▪ If you have any questions about the meeting types that your organization has purchased, please contact your WebEx account manager.

Field	Description
TelephonyPrivilege	Optional. Specifies the types of teleconferencing services that the user can use when hosting a session. This field can contain one or more of the following values for an account, depending on the teleconferencing services that your organization's WebEx service supports: ▪ CLIN: Call-in teleconferencing. Specifies that the user can host sessions in which attendees can call a telephone number to join a teleconference. ▪ TOLL: Toll-free call-in teleconferencing. Specifies that the user can host sessions in which attendees call a toll-free telephone number to join a teleconference. ▪ CLBK: Call-back teleconferencing. Specifies that the user can host sessions in which attendees receive a telephone call from the WebEx service to join a teleconference. Each attendee first calls a telephone number, and then hangs up. The service then calls the attendee's telephone number. ▪ INTL: International call-back teleconferencing. Specifies that the user can host meetings or training sessions in which attendees receive an international telephone call from the WebEx service to join a teleconference. ▪ VOIP: Internet phone. Specifies that the user can host sessions that include an Internet phone (voice over IP) conference. ▪ ILCI: International call-in numbers. Specifies that the user can host sessions for which attendees in other countries can call a local phone number to join a teleconference. ▪ SELT: Teleconferencing location. Specifies that the user can select the location of the telephony bridge to use for a teleconference. Available only if your WebEx service is provisioned with multiple bridge locations. **Note** ▪ You can specify multiple teleconferencing types for any user account, if your organization has purchased the appropriate options. To specify multiple teleconferencing types, separate them with commas, without spaces—for example: CLIN,CLBK,VOIP ▪ To determine which teleconferencing services your organization supports, refer to the Site Administration Home page.
GeneralPriv	Optional. Specifies the general privileges that the user has on your WebEx service site. This field can contain the following value:

Field	Description
	BADM: Specifies that the user is a billing administrator. The user can access Billing reports from WebEx in My WebEx. Applicable only to WebEx service sites that have the Billing Administrator option.
EditorPrivilege	Optional. If your site includes the WebEx Recording Editor, specifies whether or not the user can download WebEx Recording Editor from your site's Recording and Playback page on your site. This field can contain one of the following values: ▪ Y: The link to download WebEx Recording Editor appears to the user on the Recording and Playback page. ▪ N: The link to download WebEx Recording Editor does not appear to the user on the Recording and Playback page.
TCPrivilege	Optional. Available for Training Center sites only. Specifies which privileges the user has for Training Center. This field can contain the following value: HOLA: Specifies that the user can use the Hands-on Lab option for training sessions.
SaCPrivilege	Optional. Available for Sales Center sites only. Specifies which roles the user has on your Sales Center site. ▪ SALR: Sales representative. The user can host sales meetings and create Sales Meeting reports. ▪ SALM: Sales manager. The user can monitor meetings and create Sales Meeting reports and Sales Manager reports. ▪ SALA: Sales assistant. The user can host sales meetings and create Sales Meeting reports. ▪ SJME: Subject matter expert. The user can participate in a sales meeting as a subject matter expert (SME) in the Participants panel. If you assign the SME role to a user, you must associate one or more products with the user in the **SaCProducts** field and provide a description of the SME in the **SaCSJMEDesc** field. **Note** You can specify multiple privileges for a user account. To specify multiple privileges, separate them with commas, without spaces—for example: SALR,SJME
SaCProducts	Optional. Available for Sales Center sites only. Applicable only if you assign the subject matter expert role (SJME) to the user. Specifies the products associated with the user. You must type a product name exactly as it appears on the Product Definition page in Site Administration. You cannot specify new products in this field. Any product name that does not match an existing name in Site Administration is ignored. **Note** You can specify multiple products for a user

Field	Description
	account. To specify multiple products, separate them with commas, without spaces-for example: ZipSoft File Handler,ZipSoft File Extractor
SaCSJMEDesc	Optional. Available for Sales Center sites only. Applicable only if you assign the subject matter expert role (SJME) to the user. Specifies a description of the subject matter expert (SME). For example, you can indicate the SME's expertise, special product knowledge, and so on.
SaCSlsMgr	Optional. Available for Sales Center sites only. Specifies another Sales Center user as this user's manager. A user's manager can monitor the user's sales meetings. You can specify the full name of any user to whom you have assigned the sales manager role (SALM). **Important** You can specify the name of a manager only if that user already has the manager role privilege on your site. You cannot assign the manager role to a user in the CSV file and then specify that user as a manager for another user.
SCOptions	Optional. Available for Support Center sites only. Specifies which Remote Support options users can use. You can specify the following value in this field: AREC: Auto record. Specifies that Remote Support will automatically record support session that the user conducts.
SCShareView	Optional. Available for Support Center sites only. For a Remote Support session, specifies how a shared application or desktop appears on a representative's and customer's screen by default. You can specify the following values for this field: ▪ FSSF: Full screen - scale to fit. Specifies that a shared application or desktop appears in a full-screen view on a support representative's or customer's screen, and that the size of the application or desktop is adjusted to fit the full-screen view in its entirety. ▪ FS: Full screen. Specifies that a shared application or desktop appears in a full-screen view on a support representative's or customer's screen, but that the size of the application or desktop is not adjusted to fit the full-screen view in its entirety. ▪ WSF: Window - scale to fit. Specifies that a shared application or desktop appears in a window a support representative's or customer's screen, and that the size of the application or desktop is adjusted to fit the window in its entirety. ▪ WIN: Window. Specifies that a shared application or desktop appears in a window a support representative's or

Field	Description
	customer's screen, but that the size of the application or desktop is not adjusted to fit the window in its entirety.
SCShareColor	Optional. Available for Support Center sites only. For a Remote Support session, specifies the color setting for a shared application or desktop that appears on a support representative's or customer's screen by default. You can specify the following values for this field: ▪ 256: 256 colors. Specifies that a shared application or desktop appears in 256 colors in the viewer or the support representative's or customer's screen. This option requires less bandwidth for sharing applications or desktops than does the High color (16B) option but provides lower imaging quality. ▪ 16B: High color (16-bit). Specifies that a shared application or desktop appears in 16-bit color in the viewer or the support representative's or customer's screen. This option requires more bandwidth than the 256 color option, but provides better imaging quality.
SCSaveLoc	Optional. Available for Support Center sites only. Applies only if you specified the Auto Record (AREC) for **SCOptions** for the user. For a Remote Support session, specifies the location at which WebEx Recorder saves recording files. By default, WebEx Recorder saves all recording files at the following location on the support representative's computer: C:\My Recorded_Sessions However, you can specify any location on either a support representative's computer or another computer on your network-for example: C:\Session Recordings. If neither the default location nor a location that you specify exists, Support Center creates the necessary folders. **Important** If you specify a location on a computer on your network, ensure that ▪ The support representative's computer is mapped to the appropriate network drive. ▪ The support representative's network account has access to the location.

Field	Description
STOptions	Optional. Available for Support Center sites with the Remote Access option only. Applies only if you specified the Auto Record (AREC) for **STOptions** for the user. Specifies which Remote Access options that user can use. You can specify the following value in this field: AREC: Auto record. Specifies that Remote Access will automatically record remote support sessions that the user conducts.
STShareView	Optional. Available for Support Center sites only. Applies only if you specified the Auto Record (AREC) for **STOptions** for the user. For a Remote Support session, specifies how a shared application or desktop appears on a representative's and customer's screen by default. You can specify the following values for this field: ▪ FSSF: Full screen - scale to fit. Specifies that a shared application or desktop appears in a full-screen view on a support representative's or customer's screen, and that the size of the application or desktop is adjusted to fit the full-screen view in its entirety. ▪ FS: Full screen. Specifies that a shared application or desktop appears in a full-screen view on a support representative's or customer's screen, but that the size of the application or desktop is not adjusted to fit the full-screen view in its entirety. ▪ WSF: Window - scale to fit. Specifies that a shared application or desktop appears in a window a support representative's or customer's screen, and that the size of the application or desktop is adjusted to fit the window in its entirety. ▪ WIN: Window. Specifies that a shared application or desktop appears in a window a support representative's or customer's screen, but that the size of the application or desktop is not adjusted to fit the window in its entirety.
STShareColor	Optional. Available for Support Center sites only. Applies only if you specified the Auto Record (AREC) for **STOptions** for the user. For a Remote Support session, specifies the color setting for a shared application or desktop that appears on a support representative's or customer's screen by default. You can specify the following values for this field: ▪ 256: 256 colors. Specifies that a shared application or desktop appears in 256 colors in the viewer or the support representative's or customer's screen. This option requires less bandwidth for sharing applications or desktops than does the High color (16B) option but provides lower imaging quality. ▪ 16B: High color (16-bit). Specifies that a shared application

Field	Description
	or desktop appears in 16-bit color in the viewer or the support representative's or customer's screen. This option requires more bandwidth than the 256 color option, but provides better imaging quality.
STComputers	Optional. Available for Support Center sites with the Remote Access option only. Applies only if you specified the Auto Record (AREC) for **STOptions** for the user. Specifies which computers the user can access remotely, using Remote Access. The computers must already be defined for Remote Access in Site Administration. You must type the computer names exactly as they appear in Site Administration. **Note** You can specify multiple computers for a user account. To specify multiple computers, separate them with commas, without spaces-for example: Computer 1,Computer 2
STLocations	Optional. Available for Support Center sites with the Remote Access option only. Applies only if you specified the Auto Record (AREC) for **STOptions** for the user. Specifies the location at which WebEx Recorder saves recording files. By default, WebEx Recorder saves all recording files at the following location on the support representative's computer: C:\My Recorded Sessions However, you can specify any location on either a support representative's computer or another computer on your network—for example, C:\RemoteAccess_Recordings. If neither the default location nor a location that you specify exists, Remote Access creates the necessary folders. **Important** If you specify a location on a computer on your network, ensure that: ▪ The support representative's computer is mapped to the appropriate network drive. ▪ The support representative's network account has access to the location.
TimeZone	Optional. Specifies the index number for the time zone in which the user resides. If you do not specify a time zone, Site Administration sets the time zone for the user's account to the time zone for your meeting service Web site. For a list of time zones and their index numbers, see *Time Zones* (on page 252).
PhoneCntry	Optional. Specifies the number that you must dial to call a user who resides in another country. This field must contain only numbers.

Field	Description
PhoneLocal	Optional. Specifies the user's phone number. This field must contain only numbers. Do not include punctuation, such as dashes or periods.
PhoneCallin	Optional. Specifies the number the user must use to call in.
PhoneCallback	Optional. Specifies the number at which the user wants to be called.
CellCntry	Optional. Specifies the number that you must dial to call a user who resides in another country. This field must contain only numbers.
CellLocal	Optional. Specifies the user's mobile phone number the user must use to call in.
CellCallin	Optional. Specifies the user's mobile phone number at which the user wants to be called.
CellCallback	Optional. Specifies the extension of the user's mobile phone number. This field must contain only numbers.
AP1Cntry, AP2Cntry	Optional. Specifies the number that you must dial to call a user who resides in another country. This field must contain only numbers.
AP1Local, AP2Local	Optional. Specifies the user's pager number. This field must contain only numbers. Do not include punctuation, such as dashes or periods.
AP1Callin, AP2Callin	Optional. Specifies the pager number the user must use to call in.
AP1Callback, AP2Callback	Optional. Specifies the user's pager number at which the user wants to be called.
Pin	Optional. Specifies the user's personal identification number.
Address1	Optional. Specifies the user's mailing address.
Address2	Optional. Specifies additional information about the user's mailing address, if necessary.
City	Optional. Specifies the city in which the user resides.
State/Province	Optional. Specifies the state or province in which the user resides.
Zip/Postal	Optional. Specifies the ZIP or postal code for the user's mailing address.

Field	Description
Country/Region	Optional. Specifies the country or region in which the user resides.
MyWebEx	Optional. If your site includes the My WebEx option, specifies the type of My WebEx privilege assigned to the account. This field can contain one of the following values: ▪ STD: Specifies that the user account receives the My WebEx Standard privilege. ▪ PRO: Specifies that the user account receives the My WebEx Pro privilege. ▪ N: If your site does not include the My WebEx option, specify this value for each user account. **Note** ▪ The number of accounts for which you can specify the PRO value depends on the number of My WebEx Pro licenses available for your site. To determine the number of My WebEx Pro licenses available for assigning to user accounts, see the Add User or Edit User page in Site Administration. ▪ If, when specifying My WebEx privileges, you exceed the number of licenses for your site, Site Administration cannot create or update all accounts for which PRO is specified. For example, if your site has 10 My WebEx Pro licenses, and you specify PRO for 20 accounts, Site Administration imports account information only for the first 10 accounts for which you specified PRO. ▪ If your site includes the My WebEx option, ensure that you specify either STD or PRO for each account.
MyContacts	Optional. If your site includes the My WebEx option, specifies whether the user can access and maintain an address book from the user's My WebEx area on your site. The address book contains your company address book—if you maintain one—and allows the user to maintain a personal contacts list. This field can contain one of the following values: ▪ Y: Specifies that **My Contacts** is available in the user's My WebEx area, allowing the user to access and maintain a personal address book. ▪ N: Specifies that **My Contacts** is not available in the user's My WebEx area. However, the user can still access his or her personal address book, using the options on the Schedule a Meeting page.
MyProfile	Optional. If your site includes the My WebEx option, specifies whether the user can access his or her user profile from the user's My WebEx area on your site. This field can contain one

Field	Description
	of the following values: ▪ Y: Specifies that **My Profile** is available in the user's My WebEx area, allowing the user to access and maintain his or her user profile. ▪ N: Specifies that **My Profile** is not available in the user's My WebEx area. However, the user can still access his or her user profile, by clicking the **My Profile** link on the navigation bar.
MyMeetings	Optional. If your site includes the My WebEx option, specifies whether the user can use his or her My WebEx area on your site to access and maintain a list of meetings that he or she has scheduled. This field can contain one of the following values: ▪ Y: Specifies that **My Meetings** is available in the user's My WebEx area, allowing the user to access and maintain a list of scheduled meetings. ▪ N: Specifies that **My Meetings** is not available in the user's My WebEx area. However, the user can still access and maintain a list scheduled meetings, by clicking the **My Meetings** link on the navigation bar.
MyWorkspaces	Optional. Specifies the use of My Workspace in My WebEx.
MyRecordings	Optional. Applies only to accounts on a Training Center site and for which you have specified PRO in the **MyWebEx** field. Specifies whether the user can publish recorded training sessions on your site. This field can contain one of the following values: ▪ Y: Specifies that **My Recordings** or **My Training Recordings** (for Enterprise Edition) is available in the user's My WebEx area, allowing the user to publish recordings on your site. ▪ N: Specifies that **My Recordings** or **My Training Recordings** (for Enterprise Edition) is not available in the user's My WebEx area, preventing the user from publishing recordings on your site.
MyFolders	Optional. If your site includes the My WebEx option, specifies whether the user can store files in personal folders on your site. This field can contain one of the following values: ▪ Y: Specifies that the **My Folders** button appears in the user's My WebEx area, allowing the user to store files on your site. ▪ N: Specifies that the **My Folders** button does not appear in the user's My WebEx area, preventing the user from storing files on your site.

Field	Description
MyReports	Optional. Applies only to accounts on a Training Center site and for which you have specified PRO in the **MyWebEx** field. Specifies whether the user can generate reports containing information about training sessions that the user hosted and computers that the user accessed remotely using Access Anywhere. This field can contain one of the following values: ▪ Y: Specifies that **My Reports** is available in the user's My WebEx area, allowing the user to generate reports on your site. ▪ N: Specifies that **My Reports** is not available in the user's My WebEx area, preventing the user from generating reports on your site.
AccessAnywhere	Optional. Applies only to accounts for which you have specified PRO in the **MyWebEx** field. Specifies whether the user can set up and access remote computers, using Access Anywhere. This field can contain one of the following values: ▪ Y: Specifies that **My Computers** is available in the user's My WebEx area, allowing the user to set up remote computers on your site. ▪ N: Specifies that **My Computers** is available in the user's My WebEx area, preventing the user from setting up remote computers on your site.
MyPMR	Optional. Applies only to accounts for which you have specified PRO in the **MyWebEx** field. Specifies whether the user can receives a Personal Meeting Room page on your site, which lists the user's scheduled meetings and allows attendees to join the user's meetings from this page. This field can contain one of the following values: ▪ Y: Specifies that the user receives a Personal Meeting Room page. ▪ N: Specifies that the user does not receive a Personal Meeting Room page.
OneClickSetup	Optional. Specifies if the user can use One-Click.
AdditionalStorage	Optional. Applies only to accounts for which you have specified PRO in the **MyWebEx** field and Y for the **MyFolders** field. Specifies the number of megabytes (MB) of additional storage space that you want to allocate to the user for storing files on your site. Type only numbers in this field. If you do not want to allocate additional storage space to a user account, you can leave this field blank. **Note** ▪ The total amount of additional storage space is determined by your organization's meeting service contract. To

Field	Description
	determine the amount of remaining storage space available for allocating to user accounts, see the Add User or Edit User page in Site Administration. ▪ Depending on how WebEx configured your site, if you exceed the total amount of additional storage space for your site, Site Administration may not be able to create or update all accounts for which you allocated additional storage.
AdditionalComputers	Optional. Applies only to accounts for which you have specified PRO in the **MyWebEx** field and Y for the **AccessAnywhere** field. Specifies the number of additional computers that you want to allow the user to set up for Access Anywhere on your site. Type only numbers in this field. If you do not want to allocate additional computers to a user account, you can leave this field blank. **Note** ▪ The total number of additional computers is determined by your organization's meeting service contract. To determine the number of remaining computers available for allocating to user accounts, see the Add User or Edit User page in Site Administration. Depending on how WebEx configured your site, if you exceed the total number of additional computers for your site, Site Administration may not be able to create or update all accounts for which you allocated additional computers.
EventDocument	Optional. For Enterprise Edition sites with Event Center. Specifies whether the user can store recorded events on your site. This field can contain one of the following values: ▪ Y: Specifies that the Recorded Events page appears in the user's My WebEx area, allowing the user to store recorded events on your site. ▪ N: Specifies that the Recorded Events page does not appear in the user's My WebEx area, preventing the user from storing recorded events on your site.
TeleAcct1 - TeleAcct3	Optional. These fields contain data only if your site provides users with personal teleconference accounts, through the WebEx Telephony API or the teleconference accounts option. **Caution** Do not add or edit data in these fields. If you export user account data, these fields are populated with the teleconferencing numbers from the user's personal teleconferencing accounts. The telephony server provides these numbers to the user when the user adds a personal teleconferencing account using his or her My Profile page.
TeleconLocation	Optional. Reserved for WebEx teleconferencing service

Field	Description
	provider partners.
SendWelcomeEmail	Optional. Specifies whether your site automatically sends a Welcome email message to the user once you create the account. If your site has the email templates option, you can edit the template for the Welcome email message that your WebEx service sends to users. This field can contain one of the following values: ▪ Y: Specifies that the user receives the Welcome email message. ▪ N: Specifies that the user does not receive the Welcome email message. **Note** This option is turned off by default for most WebEx sites. If the option is off, specifying a value in this field has no effect. To turn on this option, contact your WebEx account manager.
LabAdmin	Optional. Applies only to Training Center. Specifies Training Center privilege as administrator for Hands-on Lab.
SchedulePermission	Optional. Applies only to Meeting Center, Training Center, Event Center, and Sales Center sites. Specifies the users who can schedule sessions on behalf of this user. You can specify only those users who have accounts on the same WebEx service site as this user. To specify a user, type the user's email address exactly as it appears for the user's account. You can specify multiple email address, by separating them with commas and without spaces—for example: jsmith@anyco.com,mbartel@anyco.com
PCNAcc1AutoGenerate	Specifies whether you automatically generate an access code. This field can contain one of the following values: ▪ Y: Specifies that the access code is automatically generated. ▪ N: Specifies that the access code is not automatically generated.
PCNAcc1HostAccCode	Specifies the host access code.
PCNAcc1AttndAccCodeFS	Specifies the attendee access code for full speaking teleconference.
PCNAcc1TollFreeCallinNum	Specifies the toll-free call in number.
PCNAcc1TollCallinNum	Specifies the backup toll call number.
PCNAcc1ILNum	

Field	Description
PCNAcc2AutoGenerate	Specifies whether you automatically generate an access code.
PCNAcc2HostAccCode	Specifies the host access code.
PCNAcc2AttndAccCodeFS	Specifies the attendee access code for full speaking teleconference.
PCNAcc2TollFreeCallinNum	Specifies the toll-free call in number.
PCNAcc2TollCallinNum	Specifies the toll call in number.
PCNAcc2ILNum	
PCNAcc3AutoGenerate	Specifies whether you automatically generate an access code.
PCNAcc3HostAccCode	Specifies the host access code.
PCNAcc3AttndAccCodeFS	Specifies the attendee access code for full speaking teleconference.
PCNAcc3AttndAccCodeLO	Specifies the attendee access code for listen only teleconference
PCNAcc3TollFreeCallinNum	Specifies the toll-free call in number.
PCNAcc3TollCallinNum	Specifies the backup toll call number.
PCNAcc3ILNum	

CSV File Format for Contacts

The following figure is an example of a comma-separated values (CSV) file that was formatted in Microsoft Excel. You must create your own, company-specific CSV file template.

Notes and Considerations

- Before your import contact data in a CSV file, create a backup file of your contacts data, if any, by exporting the data.
- All exports (report, user, contacts) are exported in Unicode tab-delimited text (UTF-16LE) format. All imports support CSV (for English data only) and Unicode tab delimited text (for non-English data and mixed language data.)

- A CSV file must include column headings at the top of the file. When creating a CSV file using a spreadsheet program, such as Microsoft Excel, ensure that the column headings are in the first row of a spreadsheet. Column headings must appear exactly as specified under **Contact-Information Fields** below.
- Some contact information is required, as specified under **Contact-Information Fields** below. Thus, you must include all column headings for required fields. You need not include column headings for optional fields for which you do not provide contact information.
- To ensure that your CSV file contains all required column headings, in their proper format, WebEx strongly recommends that you create a CSV file template.
- The contact-information fields in a CSV file are not case-sensitive. Thus, you can type values in either uppercase or lowercase letters, or a combination of both. However, the values that appear in the contact's information on your site-such as the contact's name-will appear as you type them in the CSV file.
- Refer to **Contact-Information Fields** below for the correct format for contact information.
- Once you finish specifying contact information, ensure that you save the spreadsheet file as a CSV file.
- When uploading a CSV file, Site Administration displays a table containing the information that you specified in the file. Please review all information carefully, and verify its accuracy before you confirm that you want to upload the file.
- If you specify any information for a contact incorrectly, Site Administration cannot create that contact. In this case, Site Administration generates a list of records for the contacts that it was unable to create, including the cause for
- each error. You can download a file containing these records to your computer for reference or to correct the errors directly in that file.
- If you correct the errors directly in the file that Site Administration creates for you, ensure that you delete the last column, labeled **Comments**, before you upload the file to create the remaining contacts.
- If, after uploading a CSV file, you want to change information that you specified for one or more contacts, you can edit contacts individually using Site Administration. Or, you can contact your WebEx account manager for assistance.

Creating a CSV File Template

1. If no contacts currently exist on your site, manually add a least one contact to your site.
2. On the navigation bar, under **Manage Site**, click **Company Addresses**.
3. On the Company Address Book page, click **Export**.
4. Open the file containing the data that you exported in a spreadsheet program, such as Excel.
5. If you want to only add new contacts, delete any contact data that the exported file contains. Deleting this data does not affect any contacts when you upload the CSV file to Site Administration.

Contact-Information Fields

Use this option...	To...
UUID	Indicates an identification number that Site Administration automatically generates for the contact. **Important** ▪ If you are adding a new contact, do not provide any information in this column. Site Administration generates this number once you upload the CSV file. Site Administration requires this field to be empty to create a new contact. ▪ If you are editing an existing contact, do not modify this number. If you modify the number for an existing contact, Site Administration creates a new contact, using the data in that row. However, if required contact data—such as an email address—already exists for a contact on your site, Site Administration cannot create the new contact.
DUID	Indicates an identification number that Site Administration automatically generates for Distributor Members.
Name	Required. Specifies the contact's first and last name.
Email	Required. Specifies the contact's email address.
Company	Optional. Specifies the organization for which the contact works.
JobTitle	Optional. Specifies the contact's job title or position in an organization.
URL	Optional. Specifies the Web page address for the contact or his or her organization.
OffCntry	Optional. Specifies the number that you must dial to call a contact who resides in another country. This field must contain only numbers.

Use this option...	To...
OffLocal	Optional. Specifies the contact's phone number. This field must contain only numbers. Do not include punctuation, such as dashes or periods.
CellCntry	Optional. Specifies the number that you must dial to call a contact who resides in another country. This field must contain only numbers.
CellLocal	Optional. Specifies the contact's mobile phone number. This field must contain only numbers. Do not include punctuation, such as dashes or periods.
FaxCntry	Optional. Specifies the number that you must dial to call a fax machine that resides in another country. This field must contain only numbers.
FaxLocal	Optional. Specifies the contact's fax number. This field must contain only numbers. Do not include punctuation, such as dashes or periods.
Address1	Optional. Specifies the contact's mailing address.
Address2	Optional. Specifies additional information about the contact's mailing address, if necessary.
City	Optional. Specifies the city in which the contact resides.
State/Province	Optional. Specifies the state or province in which the contact resides.
Zip/Postal	Optional. Specifies the ZIP or postal code for the contact's mailing address.
Country	Optional. Specifies the country in which the contact resides.
Time Zone	Specifies the time zone in which the contact resides.
Language	Specifies the language the contact uses.
Locale	Specifies the locale of the language the contact uses.
UserName	Optional. If this contact has an account for your WebEx service, you can include the contact's user name in this field. User names ▪ Cannot include spaces or punctuation marks, except underscores, hyphens, and periods ▪ Can consist of a maximum of 64 characters
Notes	Optional. Specifies any additional information about the contact.

CSV File Format for Tracking Code Values

The following figure is an example of a comma-separated values (CSV) file that was formatted in Microsoft Excel. You must create your own, company-specific CSV file template.

Notes and Considerations

- A CSV file must include column headings at the top of the file. When creating a CSV file using a spreadsheet program, such as Microsoft Excel, ensure that the column headings are in the first row of a spreadsheet. Column headings must appear exactly as specified under **Code-Value Information Fields** below.
- Some tracking code information is required, as specified under **Code-Value Information Fields** below. However, must include all column headings, regardless of whether their information is optional, and format them exactly as specified.
- The code-value information fields in a CSV file are not case-sensitive. Thus, you can type values in either upper- or lowercase letters, or a combination of both. However, the values that appear in the list of values for a tracking code on your site will appear as you type them in the CSV file.
- Once you finish specifying code values, ensure that you save the spreadsheet file as a CSV file, which as a .csv extension.
- When uploading a CSV file, Site Administration displays a table containing the information that you specified in the file. Please review all information carefully, and verify its accuracy before you confirm that you want to upload the file.
- If you specify any code values incorrectly, Site Administration cannot add those values to the list. In this case, Site Administration generates a list of records for the values that it was unable to add, including the cause for each error. You can download a file containing these records to your computer for reference or to correct the errors directly in that file.
- If you correct the errors directly in the file that Site Administration creates for you, ensure that you delete the last column, labeled **Comments**, before you upload the file to create the remaining code values.
- If, after uploading a CSV file, you want to change information that you specified for one or more code values, you can edit values individually on the Tracking Codes List page. Or, you can contact your WebEx account manager for assistance.

Code-Value Information Fields

Use this option...	To...
Index	Optional. Specifies the database ID of the tracking code value. An Index value must be a unique number from 1-500, inclusive. To prevent errors that duplicate index numbers can cause, you can leave this column blank. If the Index column does not contain values, Site Administration inserts the code values sequentially on the Tracking Codes List page.
Active	Optional. Specifies the status of the tracking code value. A value must be **Yes** or **No**. If you leave this value blank, the status automatically defaults to **Yes**.
Code	Required. Specifies the value of the tracking code. A value can be up to 128 characters, and include letters, numbers, and special characters.

Time Zones

Time zones are displayed in an easy to read format. The menu items display differently depending on whether or not the time zones are in DST (Daylight Savings Time). The time zone menu format uses this format:

Location (<Time zone name> <DST label> "Time", <GMT offset>)

An example of the time zone format as it displays is:

San Francisco (Pacific Standard Time), GMT-08:00

Time zone details are listed below.

Index	GMT	Name	Location	Standard	DST
0	-12 hr	Dateline	Marshall Islands		
1	-11 hr	Samoa	Samoa		
2	-10 hr	Hawaii	Honolulu	Standard	Daylight
3	-9 hr	Alaska	Anchorage	Standard	Daylight
4	-8 hr	Pacific	San Francisco	Standard	Daylight
5	-7 hr	Mountain	Arizona		
6	-7 hr	Mountain	Denver	Standard	Daylight

Index	GMT	Name	Location	Standard	DST
7	-6 hr	Central	Chicago	Standard	Daylight
8	-6 hr	Mexico Central	Mexico City	Standard	Daylight
9	-6 hr	Central	Saskatchewan		
10	-5 hr	S. American Pacific	Bogota		
11	-5 hr	Eastern	New York	Standard	Daylight
12	-5 hr	Eastern	Indiana	Standard	Daylight
13	-4 hr	Atlantic	Halifax	Standard	Daylight
14	-4 hr	S. American Western	Caracas		
15	-3.5 hr	Newfoundland	Newfoundland	Standard	Daylight
16	-3 hr	S. American Eastern	Brasilia	Standard	Daylight
17	-3 hr	S. American Eastern	Buenos Aires		
18	-2 hr	Mid-Atlantic	Mid-Atlantic	Standard	Daylight
19	-1 hr	Azores	Azores		Summer
20	0 hr	Greenwich	Casablanca		
21	0 hr	Greenwich Mean	London		Summer
22	1 hr	Central European	Amsterdam		Summer
23	1 hr	Central European	Paris		Summer
25	1 hr	Central European	Berlin		Summer
26	2 hr	Eastern European	Athens		Summer
28	2 hr	Egypt	Cairo	Standard	Daylight
29	2 hr	South Africa	Pretoria		
30	2 hr	Eastern European	Helsinki		Summer
31	2 hr	Israel	Tel Aviv	Standard	Daylight
32	3 hr	Saudi Arabia	Riyadh		
33	3 hr	Russia	Moscow	Standard	Daylight
34	3 hr	Nairobi	Nairobi		

Index	GMT	Name	Location	Standard	DST
35	3.5 hr	Iran	Tehran		
36	4 hr	Arabian	Abu Dhabi		
37	4 hr	Baku	Baku	Standard	Daylight
38	4.5 hr	Afghanistan	Kabul		
39	5 hr	West Asia	Ekaterinburg		
40	5 hr	West Asia	Islamabad		
41	5.5 hr	India	Bombay		
42	5.5 hr	Columbo	Columbo		
43	6 hr	Central Asia	Almaty		
44	7 hr	Bangkok	Bangkok		
45	8 hr	China	Beijing		
46	8 hr	Australia Western	Perth	Standard	Daylight
47	8 hr	Singapore	Singapore		
48	8 hr	Taipei	Taipei		
49	9 hr	Japan	Tokyo		
50	9 hr	Korea	Seoul		
51	9 hr	Yakutsk	Yakutsk		
52	9.5 hr	Australia Central	Adelaide	Standard	Daylight
53	9.5 hr	Australia Central	Darwin		
54	10 hr	Australia Eastern	Brisbane		
55	10 hr	Australia Eastern	Sydney	Standard	Daylight
56	10 hr	West Pacific	Guam		
57	10 hr	Tasmania	Hobart	Standard	Daylight
58	10 hr	Vladivostok	Vladivostok	Standard	Daylight
59	11 hr	Central Pacific	Solomon Islands		
60	12 hr	New Zealand	Wellington	Standard	Daylight

Index	GMT	Name	Location	Standard	DST
61	12 hr	Fiji	Fiji		
130	1 hr	Central European	Stockholm		Summer
131	-8 hr	Mexico Pacific	Tijuana	Standard	Daylight
132	-7 hr	Mexico Mountain	Chihuahua	Standard	Daylight
133	-4.5 hr	S. America Western	Caracas	Standard	Daylight
134	8 hr	Malaysia	Kuala Lumpur	Standard	Daylight

17

Email Template Variables

For details about the…	See…
Email template variables for Meeting Center	*Email template variables for Meeting Center* (on page 257)
Email template variables for Enterprise	*Email template variables for Enterprise* (on page 260)

Email template variables for Meeting Center

The following table lists and defines all the variables used in the Meeting Center email templates. Note that some variables can be used in multiple email templates.

Variable	Description	Templates used
%HostEmail%	Email address of the user.	Multiple
%ForwardSubjectDesc%	Text on the Subject line of the meeting email	Invitation to Register for a meeting
%Topic%	Meeting topic	Multiple
%ForwardDesc%	Text of description of the meeting	Invitation to Register for a meeting
%HostName%	Full Name of the Meeting Host	Multiple
%MeetingDateOrRecurrence%	"Meeting date or recurrence information, if any	"Invitation to Register for a meeting

Variable	Description	Templates used
%MeetingTime%	Meeting time	Multiple
%TimeZone%	Time zone for the meeting	Multiple
%PKIDescription%	Description of the Public Key Infrastructure. This will appear in the template only when the PKI option is turned on in the Super Admin.	Invitation to Register for a meeting
%MeetingInfoURL%	URL that provides the meeting information	Multiple
%MeetingInfoInOtherTimezone%	Meeting information provided in a time zone other than the one in which it was originally scheduled	Multiple
%ServiceNameURL%	URL of the service name (e.g. Meeting Center)	Invitation to Register for a meeting
%HostPhone%	Phone number of the user who is the host	Multiple
%PromotionFreeTrialDescription%	Description of any promotional text for a free trial of Meeting Center	Multiple
%PromotionFreeTrialURL%	URL of the free trial promotional text	Multiple
%EmailFooter%	Brandable Footer text used in all emails	Multiple
%Disclaimer%	Cisco WebEx legal disclaimer text used in the footer	Multiple
%AttendeeName%	Name of the meeting attendee	Multiple
%MeetingTime%	Time when the Meeting is scheduled	Multiple
%MeetingNumber%	Meeting number	Multiple
%MeetingPassword%	Meeting password	Multiple
%AlternateHostDescription%	Description of the meeting's alternate host if any	Multiple
%JoinMeetingTitle4SmartPhone%	Meeting title text when displayed on smart phones	Multiple

Variable	Description	Templates used
%TeleconferenceAttendeeDesc%	Description of attendees joining via teleconference	Multiple
%TeleconferenceInfoAttendeeNN%	Description of attendees joining via a teleconference	Multiple
%UCFAttendeeVerifyPlayers%	Message indicating attendees to verify rich media player support before joining the meeting	"MC MeetingInfo For Attendee, Multiple"
%Meeting Link%	Link to the Meeting page (from where attendees can join the meeting)	"MC MeetingInfo For Attendee, Multiple"
%iPhoneJoinMeetingDesc%	Instructions for users to join a meeting from iPhone	"MC MeetingInfo For Attendee, Multiple"
%PKI Information%	Information about the Public Key Infrastructure. This information will be present when the PKI option is turned on in the Super Admin.	"MC MeetingInfo For Attendee, Multiple"
%TeleconferenceDesc%	Description of the teleconference	"MC MeetingInfo For Attendee, Multiple"
%TeleconferencingInfo%	Information about the teleconference including teleconference numbers, etc	"MC MeetingInfo For Attendee, Multiple"
%Recording Disclaimer%	Cisco WebEx legal disclaimer text regarding making a recording of the meeting	"MC MeetingInfo For Attendee, Multiple"
%UCFHostVerifyPlayers%	Message indicating hosts to verify rich media player support before joining the meeting	"MC MeetingInfo For Host, Multiple"
%ConfCallModerator%	Information about the conference call moderator	"MC MeetingInfo For Host, Multiple"
%TeleconferenceInfoAttendee%	Information about the teleconference attendee	MC Tele MeetingInfo For Attendee
%ConfCallParticipant%	Information about the conference call participant	MC Tele MeetingInfo For Attendee
%TeleconferenceInfoHost%	Information about the teleconference host	MC Tele MeetingInfo For Host
%iCalendarText%	Information about adding	Meeting Information

Variable	Description	Templates used
	meeting to iCalendar	Updated
%DownloadToCalendarLink%	Link to download the meeting to iCalendar	Meeting Information Updated
%AttendeeJoinSection%	Information about the details to be provided for the attendee to join the meeting.	Meeting Information Updated
%MeetingManagerSetUpDesc%	Information about setting up Meeting Manager	Meeting Registration Confirmed
%SetupURL%	URL to setup Meeting Manager	Meeting Registration Confirmed
%DateTime%	Date and time information of the meeting	"Meeting Requiring Attendee Registration Rescheduled, Multiple"
%DateTimeList%	Date and time (i.e. schedule) information for meetings that have been rescheduled. Such meetings require compulsory registration.	Meeting Requiring Registration Rescheduled
%PhoneContactInfo%	Telephone number of the attendee for meetings that have been rescheduled. Such meetings require compulsory registration	Meeting Requiring Registration Rescheduled
%ReclaimHostRole%	Allows user to reclaim the Host role	Meeting Scheduled_mp

Email template variables for Enterprise

The following table lists and defines all the variables used in the Enterprise email templates. Note that some variables can be used in multiple email templates.

Variable	Description	Templates used
%HostEmail%	Email address of the Meeting user.	Multiple
%FullName%	Full name of the Center user.	Access Anywhere Requested

Variable	Description	Templates used
%URL%	URL of the Access Anywhere site	All
%ComputerName%	Name of the computer on which Access Anywhere is requested	Access Anywhere Requested
%EmailFooter%	Brandable Footer text used in all emails	ALL
%ServiceURL%	URL of the WebEx Services site	Access Anywhere Setup Information
%UserName%	"The user's ""Username"", for logging in to WebEx Services"	Access Anywhere Setup Information
%Status%	"Preliminary status of the user who has signed up for an account with WebEx. ""Status"" is ""Accept"" or ""Reject"" depending on the Accept/Reject criteria in place for the SignUp feature in site admin."	Account Signup Notification for Site Admin
%SiteURL%	URL of the WebEx Services site	Account Signup Notification for Site Admin
%HostName%	Full Name of the Meeting Host	"Account Signup Notification for Site Admin, Multiple templates"
%StatusAction%	"Action to be taken by the Site Admin on the user's request for a WebEx account, either ""Accept"" or ""Reject"""	Account Signup Notification for Site Admin
%SiteHomePageURL%	URL of the WebEx Services site home page	Account Signup Notification for Site Admin
%Subject%	Text to be used on the subject line	Multiple
%TeleconferencingInfo%	Teleconference information provided to users. Not configurable.	Multiple
%Meeting Password%	Meeting password set by the meeting host	Multiple
%SiteBrandName%:	"URL of customer's WebEx Services site, for example ""http://customer.webex.com"""	Automated Responses to Users
%AccountPassword%	Customer's WebEx account password	Automated Responses to Users

Variable	Description	Templates used
%BrandName%	"Brand name of the customer's WebEx Services site, for example ""customer.webex.com"""	Automated Responses to Users
%TechSupportEmailAddress%	Brandable email address of technical support at Webex.	Automated Responses to Users
%ServiceName%	"Brandable name of the WebEx Service (e.g. Meeting Center, Sales Center, Support Center, etc)."	Multiple
%AccountActivationURL%	URL where the user can activate the WebEx account	"Automated Responses to Users Not Activated, Multiple"
%PpuEmail%	Email address of the technical support contact person in case user has opted for a Pay Per Use account.	Multiple
%PpuPhone%	Phone number of the technical support contact person in case user has opted for a Pay Per Use account.	Multiple
%PpuSupportHours%	Working hours of the technical support contact person in case user has opted for a Pay Per User account.	Multiple
%Topic Name%	Name of the topic for which recording is available for playback directly from the WebEx Services site.	Available Recording Notification
%Recording Link%	URL or link where the recording is available for playback from the WebEx Services site.	Available Recording Notification
%Recording Time%	Start time of the recording.	Available Recording Notification
%Duration%	Duration of the recording	Available Recording Notification
%Edit Recording URL%	URL for editing recording information and playback control options.	Available Recording Notification
%Recording Info URL%	URL for viewing information about the recording such as options for letting users download the recording and related information.	Available Recording Notification
%Service Center%	URL of the WebEx Services site	"Available Recording Notification, Multiple"

Variable	Description	Templates used
%Service Recording URL%	URL of the WebEx Services site where users can view all the recordings available for the site	Available Recording Notification
%Topic%	Meeting Topic	Multiple
%MeetingDateOrRecurrence%	Date of the Meeting or recurrence information for the meeting	Multiple
%MeetingTime%	Time when the Meeting is scheduled	Multiple
%TimeZone%	Time zone where the meeting is scheduled. Time zone is configurable by the meeting host	Multiple
%iCalendarText%	Text instructions for downloading the iCal version of the meeting information	Multiple
%DownloadToCalendarLink%	URL for users who want to download the meeting information offline to the calendar format of their choice. This option is required to use iCal with Lotus Notes.	Multiple
%CreditCardLastFourDigits%	Last four digits of the customer's credit card on file.	Credit card declined for PPU Retries
%SiteAdminName%	Name of the WebEx Services Site Administrator	"Deactivated Account Notice, Multiple"
%DeactivatedNumber%	Number of days for which the account was inactive	Deactivated Account Notice
%UserList%	List of user accounts on the WebEx Services Site	"Deactivated Account Notice, Multiple"
%SiteID%	Unique numerical ID of the Site (this information is sent to the Site Admin)	Email Notification for failed Critical job
%DomainID%	Domain where the Site is provisioned.	Email Notification for failed Critical job
%JobID%	Job ID (this will represent the ID of the critical job that failed)	Email Notification for failed Critical job
%JobType%	Job Type (indicates the type of the critical job that failed - import or export)	Email Notification for failed Critical job
%ErrorMessage%	Error Message explaining the nature of the job failure	Email Notification for failed Critical job

Variable	Description	Templates used
%Request%	Name of the request	Multiple
%Request_Status%	Status of the request	Multiple
%ExportStatusPageURL%	"URL of the export status page. Displays the status of a request: Queued, In Progress, Aborted or Finished."	Export Finished Or Aborted Notification
%ExportFileName%	Name of the exported file.	Export Finished Or Aborted Notification
%SubmitDate%	Date on which the request was submitted	Multiple
%SubmitTime%	Time when the request was submitted	Multiple
%RequestEnd%	"Status of the import or export request. Depending on your request, this can take the following statuses:	
Import finished		
Import aborted		
Export finished		
Export aborted		
%FinishDate%	Date on which the submitted request was finished processing	Multiple
%FinishTime%	Time when the submitted request was finished processing	Multiple
%TotalCount%	Total count of records retrieved	Multiple
%FailCount%	Total count of records that could not be retrieved	Multiple
%DownloadCscFileURL%	Text and URL to download the export file	Multiple
%DownloadErrorLogURL%	Text and URL to download the error log for import or export	Multiple
%AdminName%	Name of the WebEx Services Site Administrator	Multiple
%ConfID%	Unique numerical ID of the conference on this site.	Multiple
%ConfName%	Name (Topic) of the conference.	Multiple

Variable	Description	Templates used
%Date%	Date of the email (Not sure if this is right) sent to the user (in this case this is the host but I'm sure there's a more generic definition of the date variable)	Multiple
%Setup%	Configurable text seeking user's feedback about the meeting setup ease	"Feedback To Host One, Multiple"
%Reliability%	Configurable text seeking user's feedback about the meeting reliability	"Feedback To Host One, Multiple"
%Performance%	Configurable text seeking user's feedback about the meeting performance	"Feedback To Host One, Multiple"
%Comments%	Configurable text seeking additional comments from the user/host	"Feedback To Host One, Multiple"
%Profile%	User's profile (not sure if this is right)	"Feedback To Host One, Multiple"
%ServerName%	Name of the server where the meeting was hosted	"Feedback To Host One, Multiple"
%MeetingNumber%	Meeting number	Multiple
%Email%	Unsure of the definition	Multiple
%Content%	Unsure of the definition	Multiple
%ServiceNameURL%	"URL of the service name (for e.g. MC, SC, $C, etc)"	Multiple
%SiteAdminEmail%	Email address of the Site Administrator	Multiple
%SiteAdminPhoneContactInfo%	Phone number of the Site Administrator	Multiple
%ImportStatusPageURL%	"URL of the import status page. Displays the status of a request to import: Pending, Queued, Aborted or Finished"	Import Finished Or Aborted Notification
%ImportFileName%	Name of the file for which an import request was placed	Import Finished Or Aborted Notification
%NewSuccessCountAdded%	Displays the count of new records successfully added (this indicates a successful import)	"Import Finished Or Aborted Notification, Multiple"

Variable	Description	Templates used
%NewSuccessCountUpdated%	Displays the count of records successfully updated (this indicates a that the database was successfully updated with the imported records)	"Import Finished Or Aborted Notification, Multiple"
%CallInPhoneNumber%	Phone number that invitees need to call in to join the meeting	Multiple
%CustomerName%	Name of the WebEx customer	Multiple
%DateTime%	Prints date and time	Multiple
%QueueName%	Name of the queue for handling customer support requests/messages	"Leave Message Email, Multiple"
%WaitTime_Tsh%	Estimated wait time for the request to be processed and resolved by CSR	"Leave Message Email, Multiple"
%CSRs%	Names of Customer Service Representatives (unsure of the exact definition)	"Leave Message Email, Multiple"
%CustomerEmail%	Customer's email address	"Leave Message Email, Multiple"
%CustomerPhone%	Customer's phone number	"Leave Message Email, Multiple"
%Question%	Question asked by the customer	"Leave Message Email, Multiple"
%FailedNumber%	Number of failed login attempts by a WebEx user.	"Locked Out Account Notice, Multiple"
%ScheduledMeeting%	Indicates whether the user has any scheduled meetings.	"Locked Out Account Notice, Multiple"

Index

A

access code for • 9
allocation rules • 195
allow external attendees • 27
alternate host, allowing users to choose • 29
audio options
    specifying default for site • 20
    specifying for all users simultaneously • 50
    specifying for individual user accounts • 46

B

branding
    of Personal Meeting Room • 30

C

Cisco TelePresence integration with Cisco WebEx Meeting Center • 9
Cisco Telepresence System Management • 9
Cisco Unified MeetingPlace • 27, 47, 59
CTSMAN
    definition of • 9
customizing
    Enterprise Edition navigation bar • 11
    My WebEx navigation bar • 12
    session types • 145, 149

D

default
    audio options for site, specifying • 20
    email options for Training Center • 131
downloads for productivity tools, displaying to users • 28, 29

E

email templates
    overview • 133
    reverting to default • 134
Enrollment form, customizing for Event Center • 17, 75
Enterprise Edition
    navigation bar, customizing • 11
    specifying default service • 2, 3
Event Center
    customizing Enrollment form • 17, 75
events
    reassigning to different hosts • 33, 73

I

Info tab, creating templates • 7
Integration to Outlook installer, displaying to users • 28, 29
integration with Cisco WebEx Meeting Center • 9

L

list format for WebEx site, specifying • 5

M

My WebEx
navigation bar, customizing • 12
storage capacity, receiving warning when exceeded • 33

N

navigation bar
for Enterprise Edition, customizing • 11
for My WebEx, customizing • 12

O

One-Click Meetings installer, displaying to users • 28, 29

P

Personal Meeting Room
allowing users to customize header area • 30
productivity tools, displaying to users • 28, 29

R

Remote Access
assigning computers and groups to support representatives • 171
changing access code or phone authentication for computer • 167
changing access code or phone authentication for group • 167
changing description or alias for remote computer • 168
changing name or description of group • 171
deleting computers or groups • 172
managing computers and computer groups • 169
managing, overview • 156
rearranging computers or groups • 171
setting access code for computers • 166
setting default installation values • 158
setting default view and color settings • 173
setting up computer for, overview • 156
setting up phone authentication for remote computers • 166
specifying IP address range for computers • 166
using registry key, silent installation • 163
reports
creating custom for Event Center • 221
deleting for Event Center • 226
downloading for Event Center • 225
editing for Event Center • 226
opening Event Center Report Builder • 221
saving custom for Event Center • 224
viewing Access Anywhere • 211
viewing general usage • 209, 210, 211
routing rules • 193

S

service requests
processing • 54
specifying options • 25
settings for Cisco TelePresence integration • 9
site preferences
default service and page for WebEx site • 2, 3
default time zone • 5
email options for Training Center • 131
Enterprise Edition navigation bar • 11
Info tab templates • 7
list format for pages on WebEx site • 5
My WebEx navigation bar • 12

service request options • 25
storage, on WebEx site, receiving warning when exceeded • 33

T

TelePresence
specifying settings for • 9
TelePresence Video • 9
templates
for email messages, overview • 133
for email messages, reverting to defaults • 134
for Info tab • 7
time zone, default for WebEx site, specifying • 5

U

usage report, viewing • 209, 210, 211

V

voice-conferencing options
specifying default for site • 20
specifying for all user accounts simultaneously • 50
specifying for individual user account • 46

W

WebEx AIM Pro installer, displaying to users • 28, 29
WebEx Multipoint Video • 9
WebEx site
activating and deactivating custom session types • 154
creating custom session types • 149
customizing email templates • 133
editing custom session types • 154
security options • 135
service requests, processing • 54
specifying general list format • 5