Cisco webex

Remote Support

User Guide

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1

New to Remote Support?

Remote Support provides an interactive environment for conducting real-time customer support sessions over the web. You can easily view, remotely control, and annotate a customer's applications or entire desktop to analyze and resolve customer issues.

What you can do

Explore problems and demonstrate solutions in real-time support sessions with your customers:

- Assist multiple customers simultaneously *More...* (on page 11)
- Add voice call, text messaging, and video to enhance communication with a customer *More...* (on page 17)
- View or control a customer's application or entire desktop or allow a customer to do the same on your computer *More...* (on page 31)
- Transfer files between your local computer and your customer's remote computer *More...* (on page 27)
- Record all or part of a support session for training or archival purposes *More...* (on page 8)
- Print documents from a customer's computer to a local printer *More...* (on page 42)
- End a session, or escalate a session to another customer support representative by transferring session control or by transferring and relinquishing the session entirely *More...* (on page 13)
- Run custom scripts on the remote customer computer to evaluate and resolve problems. *More...* (on page 23)

For your customers, Support Manager presents a simple user interface, eliminating the need for customer training.

Session types

A Remote Support session can be one of two types. A session type is determined by how the session begins.

- Inbound session: Customers select a web page link to get help and are automatically placed in your support queue. After you are done assisting your current customer, you can accept the next customer in the queue. The session begins automatically with the customer in attendance. To use this feature, you must have WebACD installed.
- Outbound session: You start the session and then invite the customer by phone, email, or instant message. You provide the customer with the support session number and the website address for the support session. The customer then joins the session.

Tip: Depending on your site settings, you can choose to help customers in single session or multi-session mode:

- **Single session**—help one customer at a time
- **Multi-session**—help multiple customers simultaneously

Console options

Support Center provides you with three options for conducting support.

- **CSR Dashboard:** appears within your browser window and has a fixed set of tabs. To provide support to a customer, use the buttons on the tabs.
- **Compact icon tray:** browser-based, takes up little desktop space, and can easily be moved around your desktop.
- **Multi-session window**: provides all the tools you need to assist multiple customers concurrently.

Each option enables you to view session and customer information, and perform common tasks.

Note that you cannot use some Remote Support features until a customer joins the support session. If you are currently using the compact icon tray, and wish to switch to the CSR dashboard or the multi-session window, see your site administrator.

CSR dashboard Tools tab

Option	Description
Invite	Invite a customer to join a session by phone, email, or instant message; or invite another support representative to join a session by email.
Chat	Open the Chat panel to send an instant chat message to a customer or another support representative.
Video	Open the Video panel to send live video to all participants in your support session. You must have a supported video camera connected to your computer.
Transfer File	Choose an option for transferring files to or from a customer's computer. ▪ **File Transfer-Basic:** Lets you publish one or more files in a window, from which a customer can download the files to his or her computer. ▪ **File Transfer-Advanced:** Lets you browse the directory structure on the customer's computer and transfer files to or from that computer
Audio	Use voice over IP (VoIP)—an Internet–based telephony service to speak with a customer or another representative participating in a support session.
Notes	While you are supporting a customer, take notes about the session. The notes are saved and become part of the Session Details report.

CSR dashboard Desktop tab

Option.	Description
Request View	Send a request to a customer to view his or her entire desktop. Once customer approves your request, a sharing window opens, in which you can view the customer's desktop and any actions that the customer takes on the desktop.
Request Control	Send a request to a customer to control his or her entire desktop. Once customer approves your request, a sharing window opens, in

Option.	Description
	which you can remotely control the customer's desktop.
Share View	Send a request to a customer to open a view of your desktop on his or her computer. Once the customer approves your request, a sharing window opens on the customer's computer, displaying your desktop. The customer can view any actions that you take on your desktop.
Share Control	Send a request to a customer to open a view of your desktop on his or her computer and let the customer control your desktop. Once the customer approves your request, a sharing window opens on the customer's computer, displaying your desktop. The customer has full control of your on your desktop.

CSR dashboard Application tab

Option	Description
Request View	Send a request to a customer to view an application on his or her computer. Once customer approves your request, the customer can select an application to share. A sharing window then opens on your computer, in which you can view the customer's application and any actions that the customer takes in the application.
Request Control	Send a request to a customer to control an application on his or her computer. Once customer approves your request, the customer can select an application to share. A sharing window then opens on your computer, in which you can remotely control the customer's application.
Share View	Send a request to a customer to open a view of your application on his or her computer. Once the customer approves your request, you can select an application to share. A sharing window then opens on the customer's computer, displaying your application. The customer can view any actions that you take in your application.
Share Control	Send a request to a customer to open a view of your application on his or her computer and let the customer control your application. Once the customer approves your request, you can select an application to share. A sharing window then opens on the customer's computer, displaying your application. The customer has full control of your application.

Option	Description
Co-browsing View	Automatically start viewing the window from which the customer invoked the session, such as a browser or MS Outlook window. If, during the session, you end co-browsing and need to co-browse again, you can initiate co-browsing as required. **Note:** Co-browsing requires WebACD. See your site administrator for additional information.
Co-browsing Control	Automatically start controlling the window from which the customer invoked the session, such as a browser or MS Outlook window. If, during the session, you end co-browsing and need to co-browse again, you can initiate co-browsing as required. **Note:** Co-browsing requires WebACD. See your site administrator for additional information.

CSR dashboard Session tab

Option	Description
Session Options	Choose a display mode for shared software. The mode you choose affects the imaging quality and performance of desktop and application sharing. ▪ **Standard:** Provides better imaging quality, but slower performance. ▪ **Screen Sampling:** Provides better performance, but lower imaging quality.
Record Session	Record your support session using WebEx Recorder. **Note** This option is not available if your site administrator has turned on the Auto Record option for your account. In this case, your support sessions are recorded automatically.
Transfer Control	Transfer control of your support session to another support representative who will become the primary support representative.
Transfer Session	Transfer your support session to a WebACD agent or queue and leave the session. **Note** This option is available only if you are a WebACD agent.
End Session	End the support session. If you have transferred control to another support representative, this option allows you to leave the session instead of ending it.

Set up Support Manager manually

To conduct a support session with a customer, both you and your customer must have Remote Support installed on your computers.

Unless your system or network policies restrict it, Support Center automatically installs Remote Support on your computer the first time you either start or join a support session. Installation takes only a few moments, so you normally do not experience a delay in starting or joining a session.

1. Go to your Support Center website.
2. On the navigation bar, expand **Support**.
3. Under **Downloads**, select **Download Support Manager for Windows.**

2

Manage a Support Session

This section describes the tasks associated with managing a support session.

Start a support session

A Remote Support session provides an environment in which you can interact with your customer to resolve product issues.

1. Log in to your Support Center website.
2. Click **Start** to start your support session.

> **Tip:** Clear the **Email** check box if you want to wait until later to send an invitation to either a customer or another support representative. When the check box is selected, a new email message window automatically appears on your screen once the session starts.

Depending on your user and site settings, Support Manager begins a session in single or multi-session mode.

> **Important:** If you are using the CSR dashboard, you must keep the Remote Support page open throughout the support session. If you close it, or open another web page in the browser window in which it appears, the session will end.

3. If you received an email invitation to the remote support session, enter your customer's email address and send it.
4. If you did not receive an email invitation, invite your customer to the support session as follows:
   - If you have the CSR dashboard open, click the **Tools** tab then click **Invite.** Select an option on the Invite panel.

  - If you are in a multi-session window or have the icon tray available, click **Invite.** Select an option on the Invite panel.

Tip: A customer can also join a support session by accessing your Support Center website, then clicking **Join** on the navigation bar.

Once the customer joins the session, the Remote Support page appears in the customer's web browser.

5. Optional. Invite another customer support representative to your session by accessing the Invite panel again.

Record a support session

Use WebEx Recorder to create a video recording of all screen activity on your computer, including mouse movements and annotations. You can also capture synchronized audio in your recording.

WebEx Recorder is available in these versions:

- **Local meeting recorder.** This recorder captures screen activity and audio in a support session, and then saves the recorded data in a recording file on your computer. See *WebEx Recorder and Player User's Guide* for information on this recorder.
- **Network based meeting recorder.** This recorder captures screen activity and audio on a WebEx recording server, thereby saving processor resources and hard disk space on your computer. See *WebEx Player for Advanced Recording Format (.arf) Files User's Guide* for information on this recorder.

1. Do one of the following:
   - On the CSR dashboard, click the **Session** tab, then click **Record**.
   - On the icon tray, or in the multi-session window, click **Record.**

   If a default recorder was specified by your site administrator, the recorder panel appears and recording starts automatically.

   If no default recorder was specified by your site administrator, the WebEx Recorder Setup dialog appears.
2. Choose the applicable recorder.
3. Optional. Check **Set as default setting** to make this recorder the default recorder.
4. Click **Start Recording**.

The recorder panel appears and recording starts automatically.

Take notes during a support session

1. On the icon tray, or in the multi-session window, click **Session**.
2. On the session menu, choose **Session Notes**.
3. Type notes into the panel window and click **Save**.

As you end the session, you will be prompted to review and edit the session notes. When the session ends, the notes are saved and become part of the Session Details report.

Invite a customer to a support session

You can invite one or more customers to a support session by

- sending an invitation email message
- instructing the customer to join from the website
- sending an instant message with a join link

If you invite another customer to join the session, the original customer receives a message that the other customer has joined the session. This topic describes how to invite a customer to a session by using email.

1. Do one of the following:
    - On the CSR dashboard, click the **Tools** tab, then click **Invite**.
    - On the icon tray, or in the multi-session window, click **Invite**.

    The Invite dialog box, or panel, appears.
2. For Invite a, select **Customer**.
3. Type the email address of the recipient in the text box.
4. Optional. Make sure that **Send using my own email program** is checked. When selected, this option:
    - Enables the invitation to be sent by your own email program, rather than being sent by Support Manager directly.
    - Helps to prevent your invitation from being removed by the recipient's spam filter.
    - Helps the recipient to receive the invitation more quickly.

5. Click **OK**.

   If you chose to send the invitation using your own email program, the invitation appears in a new message window. Send the invitation.

   The customer receives an email invitation with the support session link.

Invite another support representative to a session

You can invite another customer support representative to a support session by

- sending an invitation email message
- copying the join link into an instant message
- instructing the support representative to join from the website.

This topic describes how to invite another representative by using email.

1. Do one of the following:
   - On the CSR dashboard, click the **Tools** tab, then click **Invite**.
   - On the icon tray, or in the multi-session window, click **Invite**.

   The Invite dialog box, or panel, appears.
2. For Invite a, select **Support representative**.
3. Type the email address of the support representative in the text box.
4. Optional. Make sure that **Send using my own email program** is checked. When selected, this option
   - Enables the invitation to be sent by your own email program, rather than being sent by Support Center directly.
   - Helps to prevent your invitation from being removed by the recipient's spam filter.
   - Helps the recipient to receive the invitation more quickly.

   If you chose to send the invitation using your own email program, the invitation appears in a new message window. Send the invitation.

The support representative receives an email invitation with the support session link.

Attend to multiple customers in a single support session

You can attend to multiple customers in a single support session, or in multiple support sessions. The option to manage multiple remote sessions is determined by your site and your site privileges. The maximum number of customers you can assist simultaneously is set by your system administrator.

1. If you are managing a single support session:

   All customers are listed in the Participants panel. To assist one, simply select their name.

   - If you or a customer shares a desktop or application, all participants in the support session can view the shared software.
   - Once you switch to a different customer, all current sharing activities end automatically. For example, if you are sharing your application or desktop, or viewing a customer's application or desktop, the sharing window automatically closes.

2. If you are managing multiple remote sessions:

   Each customer is displayed in a separate session tab. Select a tab to assist a customer.

Assist another support representative

If you have a user account on a Support Center website, you can assist another customer support representative in an in-progress support session to:

- Observe application and desktop sharing
- Participate in a chat
- View video that the support representative is sending
- Take control of the support session if the support representative passes control to you
- Become the primary support representative if the current primary support representative transfers the session to you.

You can join a support session as an assistant from:

- An invitation email message, if the support representative sent you an invitation

- A link in an instant message
- Your Support Center website

This topic describes how to join a support session from your Support Center website.

1. Ensure that the support representative who is currently controlling the support session provides you with the session number for the session.
2. Log in to your Support Center website.
3. On the navigation bar, expand **Provide Support**, and then click **Assist Session**.

   The Assist Support Session In Progress page appears.
4. Type the Support Session number in the text box, and then click **Join**.

   You are now an assistant in the support session.

   As an assisting support representative, you do not have control of the support session. However, the primary support representative can pass control to you or relinquish the session to you entirely.

Transfer control of a support session

You can transfer control of a support session to another support representative who is assisting you in your session. This option is useful, for example, if you need to escalate a call.

Once you transfer a session, you can remain in the session to observe application and desktop sharing, participate in a chat, and view video. At any time, the support representative to whom you transferred the session can transfer the session back to you.

1. Do one of the following:
   - On the CSR dashboard, click the **Session** tab, then click the down arrow on the **Transfer Session** button and choose **Transfer Control**.

     The Transfer Control dialog box appears with a list of all customer support representatives who have joined the session as assistants.
   - On the icon tray, or in the multi-session window, click the **Session** button, and then hold the cursor over **Transfer Control** to choose from a list of all customer support representatives who have joined the session as assistants.
2. Select the support representative's name in the list.

The support representative now controls the support session. The control session functions now become unavailable to you unless the support representative transfers control of the session back to you.

- You can leave the session, but you cannot end the session unless control is transferred back to you.
- All support activities automatically end, including application and desktop sharing, file transfer, chat, video, and recording.
- If you started a voice call, the voice call continues if the system to which you are transferring control supports voice call requirements.

3 **Optional.** You can transfer and relinquish the session to a WebACD agent or queue. This option is available only if you are a WebACD agent.

Transfer a session to a WebACD agent or queue

You can transfer a support session to a WebACD agent or queue of WebACD agents. This option is useful, for example, if you need to escalate a call and leave the session so that you can assist another customer.

The option to transfer a session is available only if you are a WebACD agent.

1. Do one of the following:
    - On the CSR dashboard, click the **Session** tab, then click the down arrow on the Transfer Session button and choose **Transfer Session**.
    - On the icon tray, or in the multi-session window, click **Session**, then choose **Transfer Session**.

    The Transfer Session dialog box appears.

2. Do one of the following:
    - Click the **Queues** tab and select a queue-you can select only one queue
    - Select one or more WebACD agents in the **Agents** tab

3. Optional. Type a personal message to an agent or to all available agents in a queue. The message can be up to 345 characters long.

    The session is now relinquished to the WebACD agent or queue for resolution and your participation is ended. You automatically leave the session. If you started a voice call, the voice call ends.

Obtain permission from a customer automatically

1. Make a request to perform a support activity—such as to view or control a customer's application.

   Your request appears in a message box on the customer's screen.
2. Verbally ask the customer to check **Grant permission for all actions during this session without prompting again** then select **OK**.

You can now freely view or control applications, view or control the desktop, transfer files, or record a session.

Use chat

Either you or a customer can initiate a chat session. If provisioned for your site, your Chat panel may display the Quick Phrase option. This feature must be turned on by your site administrator in order for it to be available for customer support agents.

1. Do one of the following:
   - On the CSR dashboard, click the **Tools** tab, and then click **Chat**.
   - On the floating icon tray, or in the multi-session window, click the **Chat** icon.

   The Chat panel appears.
2. For Send to, select a user. If you want to send a message to all participants in the session, select **All Participants**.
3. If you have Quick Phrase enabled on your site, select a frequently used sentence.
4. If you do not have Quick Phrase enabled on your site, type a message in the box.
5. Click **Send**.

The recipient that you selected receives the chat message in his or her Chat panel.

Any messages that a customer or another support representative sends appear in your Chat panel.

End a support session

You can end a support session at any time, but a customer cannot. Customers can, however, leave a support session at any time by clicking **Leave Session** on the Remote Support page.

1. Do one of the following:
    - On the CSR dashboard, click the **Session** tab, then click **End Session.**
    - On the floating icon tray, click the **Session** button, and choose **End Session.**
    - In the multi-session window, select the tab for the session you want to end, then click the **Session** button, and choose **End Session**.
2. Click **OK** to confirm your action.

3

Use Voice Call

Voice Call (powered by GIPS) is an option that allows support session participants to speak to each other if they have computers enabled for voice over IP (VoIP)—an Internet–based telephony service. Up to two participants can speak at a time in a voice call session. As the support representative, you determine who can speak by passing the microphone to a participant.

Start or end a voice call

Support representative

Once you start a voice call during a support session, any participating customer or support representative whose system is enabled for voice over IP (VoIP)—an Internet–based telephony service—can join the voice call.

To participate in a voice call your customer must use a headset with a microphone.

Before starting a voice call,

- ensure that your computer has a sound card and either speakers and a microphone, or a headset with an integrated microphone. For better audio quality and greater convenience, use a computer headset with a high-quality microphone.
- if you have not done so already, use the Audio Setup Wizard to fine tune your computer's settings for Voice Call. *More…* (on page 19)

1. Do one of the following:
    - On the CSR dashboard, click the **Tools** tab, then click **Voice Call**.
    - On the icon tray, or in the multi-session client, click **Voice Call**.
2. Select **Start Voice Call**.

   The following occurs:

- The Volume dialog box appears.
- A **voice call** indicator appears near your name.
- The Join Voice Call message box automatically appears in the customer's session window. The customer can then choose to participate in the voice call session.

3 To end a voice call, do one of the following:

  - On the CSR dashboard, click the **Tools** tab, then click the down arrow on **Voice Call**.
  - On the icon tray, or in the multi-session window, click **Voice Call**.

4 Select **End Voice Call**.

  Although the voice call ends, the support session continues until you end it.

Allow a participant to speak in a voice call

Support representative

Once you start a voice call, up to two participants can speak at a time. You can specify which participants can speak by passing the microphone to a customer or to another support representative.

1 Do one of the following:

  - On the CSR dashboard, click the **Tools** tab, then click the down arrow on **Voice Call**.
  - On the icon tray, or in the multi-session window, click **Voice Call**.

2 Select **Pass Mic To** then select the name of the participant whom you want to allow to speak.

  The Voice Call indicator turns green next to that participant's name. The participant can now speak until you pass the microphone to another participant.

Leave and rejoin a voice call

Customer or other support representative

During a support session, your customer or an assistant support representative can leave your voice call without leaving the session and rejoin the voice call at any time.

1. To leave a voice call, advise your customer to, click the down arrow on the **Voice Call** button then select **Leave Voice Call.**
2. To rejoin a voice call, advise your customer to click the down arrow on the **Voice Call** button then select **Join Voice Call**.

Set Voice Call options

Support representatives and customers

1. To use the Audio Setup Wizard for Voice Call:
   a) Click the **Voice Call** button.
   b) Choose **Audio Setup Wizard** then follow the directions to specify settings.
2. To set the speaker or microphone volume:
   a) Click the **Voice Call** button.
   b) Select **Volume** then set the speaker or microphone volume as appropriate.

4

Manage a Customer's Computer

This section describes tasks that can help you diagnose and resolve hardware or software issues on a customer's computer.

Note: The technical support features described here can be disabled for a WebACD queue by your site administrator. If you do not see these features appearing on your site, contact your site administrator for assistance.

View a customer's system information

Note: Technical support features such as this one can be disabled for a WebACD queue by your site administrator. If this feature is not appearing on your site, contact your site administrator for assistance.

During a support session, with the customer's permission, you can view detailed information about your customer's computer. This information can help you to diagnose and repair the customer's computer. If you or your customer make any changes to the system, you can restart the customer's computer remotely, and then view the changes to the system information.

Once you display information about a customer's computer, you can either print it or save it to a file.

1. Do one of the following:
   - On the CSR dashboard, under **Customer Information**, click **System Information**.
   - On the icon tray, click **Customer System Information**.

- In the multi-session window, click the **System Information** tab for the customer.

The customer is asked for permission to view the system information. After the customer grants permission, the System Information window appears.

2. Optional. In the list on the left, click a category to view a panel that contains the corresponding information.
3. Optional. To view the latest system information, click **Refresh**.

View a list of available scripts

Note: Technical support features such as this one can be disabled for a WebACD queue by your site administrator. If this feature is not appearing on your site, contact your site administrator for assistance.

A custom script is a script that you or another CSR can create to run on a customer's computer. Such a script, once created, is often useful in other support sessions.

You can create such frequently-used scripts and then store them in the Custom Scripts Library for selection and upload, as required, during a support session.

1. Log in to your Support Center website.
2. On the left navigation bar click **Scripts Library**.

   The Customer Scripts Library dialog appears.

You can create, modify, publish or delete customer scripts from the Custom Scripts Library. Click on any column heading to sort the scripts.

Create and publish a custom script

You can edit or delete any custom script that you create.

1. Click **Add New Script**.

   The Add New Script dialog box appears.

2. For Script Name, enter a unique name.
3. Choose a category.

   Categories are created by your site administrator.

4. **Optional.** Enter a description of the script for clarification purposes.
5. Select **Publish to Script Library** if you want to have this script available to yourself and other CSRs during support sessions.
6. Click **Browse** to navigate to the script execution file.
7. If another script is required as input to the execution script, click **Browse** to select it.
8. Click **Submit** or **OK.**

If the script contains errors, for example, if the script name already exists, you can correct the errors. Once the script is successfully submitted, the new script is created and displayed in the Script Library.

Modify or delete a custom script

1. Log in to your Support Center website.
2. On the left navigation bar click **Scripts Library**.

   The Customer Scripts Library dialog appears.
3. Click **Edit** or **Delete** under the Actions column.
   - Edit-modify the script definition, including changing the script execution file or the input file required by the execution file, if any.
   - Delete-confirm the delete request to delete the script from the library. You can delete only those scripts that you created.

Run a custom script during a session

While you are in a session with a customer, you can upload and execute one or more custom scripts on your customer's computer to quickly evaluate and resolve problems.

1. On the CSR console menu, choose **Customer computer** > **Custom Scripts Library**.

   The Custom Scripts Library dialog box appears with a list of available scripts for your site.
   - Scripts can be up to 1 MB in size.
   - Multiple scripts run sequentially in the order you specify here.
   - In a multi-session window, script execution can proceed concurrently across multiple sessions

  - Click on any column heading to sort the script library.
2. Use the **Move Up** or **Move Down** keys to order scripts.
3. Click **Run Scripts**.

   The customer is asked to grant permission. After permission is received, the scripts are executed on the the customer's computer.

The log output of the script is displayed in the Chat window along with any errors that may have been encountered. The log is also available in the Session Details report.

Scripts are run in temporary folders. Nothing remains on the customer’s computer once the script execution is complete.

Save and print information about a customer's computer

Note: Technical support features such as this one can be disabled for a WebACD queue by your site administrator. If this feature is not appearing on your site, contact your site administrator for assistance.

If you view information about a customer's computer, you can either save the information to a text file (.txt) or print it on a printer connected to your computer.

Support Manager displays categories of information about a customer's computer on separate panels. However, the saved file or printout includes the system information in all of the categories. You need not save or print each category of information individually.

1. Display information about the customer's computer. For instructions, see *View a customer's system information* (on page 21).
2. In the System Information window, do one of the following:
   - To save the information to a file, click **Save**.
   - To print the information, click **Print**.

Log on to a customer's computer as a different user

Note: Technical support features such as this one can be disabled for a WebACD queue by your site administrator. If this feature is not appearing on your site, contact your site administrator for assistance.

During a support session, you can log on to a customer's computer as another user. For example, you may want to log on to the computer using an administrator account so you can perform additional activities on the computer. If the customer's computer is attached to an internal network, you must log on using an account on that network.

Logging on as a different user temporarily logs the customer off of the computer. For Windows 7 and Vista users, all applications that were running on the customer's computer will be closed.

You can log off the customer's computer at any time during the session, and automatically log the customer back on the computer. If you are logged on to the customer's computer when you end the session, Support Manager automatically logs the customer back on to his or her computer.

1. Do one of the following:
   - On the CSR dashboard, under **Customer Information**, click **Log On as Different User**.
   - On the icon tray, or in the multi-session window, click the **Session** button, then choose **Customer Computer** > **Log On As Different User**.

   A message appears, informing you that the customer has received your request to log on to his or her computer. Your request appears in a message box on the customer's screen. The customer must grant permission to you by clicking **OK** in the message box.
2. Click **OK** to close the message box on your computer.

   If the customer approved your request, the Log On to Customer Computer dialog box appears.
3. Provide the required account information, and then click **OK**.
4. To log off the customer's computer, do one of the following:
   - On the CSR dashboard, under **Customer Information**, click **Log off**.
   - On the icon tray, or in the multi-session window, click the **Session** button, then choose **Customer Computer** > **Log out** [*user name*].

Restart a customer's computer

Note: Technical support features such as this one can be disabled for a WebACD queue by your site administrator. If this feature is not appearing on your site, contact your site administrator for assistance.

During a support session, you can restart a customer's computer remotely. Once the customer's computer restarts, the customer can rejoin the support session automatically, without having to provide the session number or other information.

1 Do one of the following:

   - On the CSR dashboard, under **Customer Information**, click **Reboot Computer**.
   - On the icon tray, or in the multi-session window, click the **Session** button, then choose **Customer Computer** > **Reboot**.

   A message appears, informing you that the customer has received your request to restart his or her computer. Your request appears in a message box on the customer's screen. The customer must grant permission to you by clicking **OK** in the message box.

2 Click **OK** to close the message box on your computer.

The customer's computer restarts. The customer must then log back in to his or her computer or network. A message then appears on the customer's screen, allowing the customer to rejoin the support session.

5

Transfer Files

If your site permits it, during a support session, you can transfer files to or from a customer's computer. For example, you can deliver patches or updates to a customer's computer, or upload log files from the customer's computer to your computer for later analysis.

There are two options for transferring files to and from a customer's computer depending on the configuration of your site and user account.

- Basic: publish one or more files for a customer to download during a support session
- Advanced: transfer a single file, multiple files simultaneously, or an entire folder to and from the customer's computer.

Use basic file transfer

During a support session, you can publish files that reside on your computer in a window, which appears on the customer's screen. A customer can then download the files to his or her computer.

1. Do one of the following:
    - On the CSR dashboard, click the **Tools** tab, and then click **Transfer File.**

      In the Choose File Transfer Option dialog box that appears, select **Basic File Transfer.**
    - On the icon tray, click **File Transfer**, then choose **File Transfer Basic.**
    - In the multi-session window, click **File Transfer**, then click **Start File Transfer Basic.**

A message appears, informing you that the customer has received your request to transfer files. Your request appears in a message box on the customer's screen. The customer must grant permission to you by clicking **OK** in the message box.

2. Click **OK** to close the message box on your computer.

   The File Transfer window appears on your screen and the customer's screen.

3. Click **Share File**.
4. Select the file that you want to publish.
5. Click **Open**.

   The file appears in the File Transfer window. The customer selects the file, and then clicks **Download** to select a directory to receive the transfer.

6. To stop publishing files during a support session, in the title bar of the File Transfer window, click **End File Transfer**.

   Support Manager closes the File Transfer window on the customer's screen.

Use advanced file transfer

The advanced file transfer option provides two modes for transferring files:

- If your site permits it and you are in sharing mode, your customer grants permission and can view all actions that you take when transferring files. The customer can stop the file transfer at any time.
- In non-sharing mode, the customer grants permission, but cannot see your actions or stop the file transfer once it begins.

You can perform the following file transfer tasks:

- Transfer any file types to or from a customer's computer at any time, or when viewing or controlling a customer's desktop. You can transfer files of up to 150 MB at once.
- Access files on the customer's network, if the drives are mapped on the customer's computer and your Support Center service includes this option.
- Delete files on the customer's computer.
- Rename files on the customer's computer.

Important: You cannot transfer files if you or another support representative is viewing or controlling a customer's application. To transfer files to or from your computer, you must stop application sharing.

1. Do one of the following:
   - On the CSR dashboard, click the **Tools** tab, and then click **Transfer File**.

     In the Choose File Transfer Option dialog box that appears, select **Advanced File Transfer**.
   - On the icon tray, click **File Transfer**, then choose **File Transfer Advanced**.
   - In the multi-session window, click **File Transfer**, then click **Start File Transfer Advanced**.

     A message appears, informing you that the customer has received your request to transfer files. The customer must grant permission to you by clicking **OK** in the message box that appears on their screen.
2. Click **OK** to close the message box on your computer.

   Once the customer grants permission to you, the WebEx File Transfer window appears. The file directory for your computer appears in the pane on the left. The file directory for the customer's computer appears in the pane on the right.
3. Select the destination folder on either pane of the File Transfer window - this is the folder in which you want to transfer, delete, or rename files.
4. In the other pane, select the files or folder that you want to transfer.
   - To create a new folder, click **New Folder**.
   - To select multiple files, hold down the **Ctrl** key when clicking the files.
   - To delete or rename a file, right-click the file.
5. To transfer the files or folder from one computer to the other, click the appropriate arrows.

   If you are not using desktop sharing, a message appears on the customer's screen requesting permission for you to transfer, delete, or rename the file. The customer must click **OK** for the action to proceed.

   Note: You can cancel the file transfer if it is already in progress by clicking **Abort Transfer**.

   Once Support Manager transfers, deletes, or renames a file, the status bar on the WebEx File Transfer window displays a message to indicate that the action is complete.

6

Share Desktops and Applications

Sharing lets you view or control a customer's application, browser, or entire desktop, without the need to run any of the customer's applications on your computer. Similarly, a customer can view or control your application or desktop.

- Desktop sharing is ideal for viewing or controlling multiple applications at once, or accessing other areas of a customer's computer. *More...* (on page 32)
- Application sharing is useful if you want to demonstrate or troubleshoot a single application on a customer's computer, and generally provides better performance than desktop sharing. *More...* (on page 35)
- Co-browsing enables you to automatically share the browser window from which the customer originally invoked the session. In addition, you can choose to co-browse if the need arises in a session. *More...* (on page 41)

Share desktops

Desktop sharing is ideal for viewing or controlling multiple applications at once, or accessing other areas of a customer's computer. You can simply view, or view and control, a customer's desktop.

View a customer's desktop

You can view a customer's desktop without controlling it.

1. Do one of the following:
    - On the CSR dashboard, click the **Desktop** tab.
    - On the icon tray, click the **Remote Control** icon.

- In the multi-session window, click the Customer tab, then click the **Sharing** tab.

2 Click **Request View**.

A message appears, informing you that the customer has received your request. The customer must grant permission to you by clicking **OK** in the message box that appears on their screen.

3 Click **OK** to close the message box on your computer.

Once the customer grants permission to you, the customer's desktop appears in a sharing window on your screen. On the customer's screen, the Desktop View window appears, indicating that the customer is sharing his or her desktop.

Note:

- For tips that can help you to share more effectively, see *Tips for sharing desktops or applications* (on page 43).
- By default, the customer's desktop appears in a full-screen view on your computer.
- A customer can allow you full viewing privileges during the support session, without having to grant permission to you each time you request to do so. *More...* (on page 14)
- When viewing a customer's desktop, you can transfer files to or from the customer's computer. For details, see *More...* (on page 27)

Control a customer's desktop

You can remotely control a customer's entire desktop.

1 Do one of the following:

- On the CSR dashboard, click the **Desktop** tab.
- On the icon tray, click the **Remote Control** icon.
- In the multi-session window, click the Customer tab, then click the **Sharing** tab.

2 Click **Request Control**.

A message appears, informing you that the customer has received your request. The customer must grant permission to you by clicking **OK** in the message box that appears on their screen.

3 Click **OK** to close the message box on your computer.

Once the customer grants permission to you, the customer's desktop appears in a sharing window on your screen. On the customer's screen, the Desktop Control window appears, indicating that the customer is sharing his or her desktop.

4. To begin controlling the desktop, click your mouse button in the sharing window on your screen.

Note:

- For tips that can help you to share more effectively, see *Tips for sharing desktops or applications* (on page 43).
- By default, the customer's desktop appears in a full-screen view on your computer.
- A customer can take back control of the desktop at any time by clicking his or her mouse on the desktop. You can also take control again by clicking your mouse in the window in which the shared desktop appears.
- A customer can allow you full viewing privileges during the support session, without having to grant permission to you each time you request to do so. *More...* (on page 14)

Show your desktop to a customer

You can allow a customer to view your desktop. Viewing the desktop does not allow the customer to control it remotely.

1. Do one of the following:
    - On the CSR dashboard, click the **Desktop** tab.
    - On the icon tray, click the **Remote Control** icon.
    - In the multi-session window, click the Customer tab, then click the **Sharing** tab.
2. Click **Share View**.

    A message appears, informing you that the customer has received your request. The customer must grant permission to you by clicking **OK** in the message box that appears on their screen.
3. Click **OK** to close the message box on your computer.

Your desktop appears in a sharing window on the customer's screen. On your computer, the Desktop View window appears, indicating that you are sharing your desktop.

Note: For tips that can help you to share more effectively, see *Tips for sharing desktops or applications* (on page 43).

Give control of your desktop to a customer

During a support session, you can give control of your desktop to your customer. If you are already showing your desktop to a customer, you can let the customer control it without stopping the current desktop sharing session.

Caution: A customer who has remote control of your desktop can run any programs and access any files on your computer that you have not protected with a password.

1. Do one of the following:
   - On the CSR dashboard, click the **Desktop** tab.
   - On the icon tray, click the **Remote Control** icon.
   - In the multi-session window, click the Customer tab, then click the **Sharing** tab.
2. Click **Request Control**.

   A message appears, informing you that the customer has received your request. The customer must grant permission to you by clicking **OK** in the message box that appears on their screen.
3. Click **OK** to close the message box on your computer.

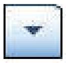
   Your desktop appears in a sharing window on the customer's screen. On your computer, the Desktop View window appears, indicating that you are sharing your desktop.
4. Instruct the customer to click his or her mouse in the sharing window.
5. To temporarily take back control of your desktop, click your mouse anywhere on your desktop.

Note: For tips that can help you to share more effectively, see *Tips for sharing desktops or applications* (on page 43).

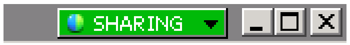
Stop desktop sharing

1 Do one of the following:

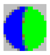
- On the icon tray, click the **Session** button.
- In the title bar of any open window, click the **Sharing** button.
- In the lower-right corner of your desktop, click the **Sharing** icon.



Session button



Sharing button



Sharing icon

2 On the menu that appears, choose **Stop Sharing**.

Share applications

Application sharing is useful if you want to demonstrate or troubleshoot a single application on a customer's computer, and generally provides better performance than desktop sharing.

You can simply view, or view and control, a customer's application.

View a customer's application

You can view an application that is running on the customer's computer. Viewing an application does not allow you to control it remotely.

1 Do one of the following:

- On the CSR dashboard, click the **Application** tab.
- On the icon tray, click the **Remote Control** icon.
- In the multi-session window, click the Customer tab, then click the **Sharing** tab.

2 Click **Request View**.

A message appears, informing you that the customer has received your request. The customer must grant permission to you by clicking **OK** in the message box that appears on their screen.

3 Click **OK** to close the message box on your computer.

Once the customer grants permission to you, the Application View dialog box appears on the customer's computer.

4 Ask the customer to choose the application that you want to view.

If necessary, provide the customer with instructions for choosing an application. *More...* (on page 37)

Once the customer chooses the application that you want to view, it appears in a sharing window on your computer.

Note:

- For tips that can help you to share more effectively, see *Tips for sharing desktops or applications* (on page 43).
- By default, the customer's application appears in a full-screen view on your computer.
- The customer can choose additional applications for you to view from Application View dialog box, so you can view multiple applications simultaneously.
- A customer can allow you full viewing privileges during the support session, without having to grant permission to you each time you request to do so. *More...* (on page 14)

Control a customer's application

Once a customer gives you permission to control an application, you can remotely control any application on a customer's computer.

1 Do one of the following:

  - On the CSR dashboard, click the **Application** tab.
  - On the icon tray, click the **Remote Control** icon.
  - In the multi-session window, click the Customer tab, then click the **Sharing** tab.

2 Click **Request Control**.

A message appears, informing you that the customer has received your request. The customer must grant permission to you by clicking **OK** in the message box that appears on their screen.

3 Click **OK** to close the message box on your computer.

Once the customer grants permission to you, the Application Control dialog box appears on the customer's computer.

4 Ask the customer to choose the application that you want to control.

If necessary, provide the customer with instructions for choosing an application. *More...* (on page 37)

Once the customer chooses the application that you want to control, it appears in a sharing window on your computer.

5 To begin controlling the application, click your mouse button in the sharing window.

Note:

- For tips that can help you to share more effectively, see *Tips for sharing desktops or applications* (on page 43).
- If you are already viewing a customer's application, requesting remote control allows you to control only that application. If you want to control another application, you must first stop sharing the application that you are viewing, then request remote control.
- A customer can take back control of an application at any time by clicking his or her mouse button in the application. You can also take control again by clicking your mouse button in the sharing window.
- The customer can choose additional applications for you to control from Application Control dialog box, so you can control multiple applications simultaneously.
- A customer can allow you full viewing privileges during the support session, without having to grant permission to you each time you request to do so. *More...* (on page 14)

Help a customer to share an application

Once a customer accepts your request to view or control an application, the Application View or Application Control dialog box appears on the customer's screen.

By default, the dialog box shows a list of all applications currently running on the customer's computer.

1 Instruct the customer to do one of the following:

  - If the application you want to view or control is currently running, ask the customer to select it in the list, and then click **Share**.

- If the application you want to view or control is not currently running, ask the customer to click **New Application**. The New Application dialog box appears, showing a list of all applications on the computer. Ask the customer to select the application, and then click **Share**.

2 To stop sharing, ask the customer to do one of the following:

- On the icon tray, click the **Session** button > **Stop Sharing**.
- In the title bar of any open window, click the **Sharing** button > **Stop Sharing**.
- In the lower-right corner of your desktop, click the **Sharing** icon > **Stop Sharing**.

Show an application to a customer

You can allow a customer to view your application. Viewing the application does not allow the customer to control it remotely.

1 Do one of the following:

- On the CSR dashboard, click the **Application** tab.
- On the icon tray, click the **Remote Control** icon.
- In the multi-session window, click the Customer tab, then click the **Sharing** tab.

2 Click **Request Control**.

A message appears, informing you that the customer has received your request. The customer must grant permission to you by clicking **OK** in the message box that appears on their screen.

3 Click **OK** to close the message box on your computer.

The Application View dialog box appears, showing a list of all applications currently running on your computer.

4 Do one of the following:

- If the application you want to share is currently running, select it in the list, and then click **Share**.
- If the application you want to share is not currently running, click **New Application**. The New Application dialog box appears, showing a list of all applications on your computer. Select the application, and then click **Share**.

If the application is not already running, it starts automatically.

Your application appears in a sharing window on the customer's screen.

5. To stop application sharing, do one of the following:
    - On the icon tray, click the **Session** button > **Stop Sharing**.
    - In the title bar of any open window, click **Sharing** > **Stop Sharing**.
    - In the lower-right corner of your desktop, click the **Sharing** icon > **Stop Sharing**.

Note:

- You can share multiple applications simultaneously. *More…* (on page 39)
- For tips that can help you to share more effectively, see *Tips for sharing desktops or applications* (on page 43).

Share multiple applications

If you are already sharing an application with a customer, you can share additional applications simultaneously. Each application that you share appears in the sharing window on the customer's screen.

1. Do any of the following:
    - On the icon tray, or in the multi-session window, click the **Session** button.
    - On the title bar of the application that you are currently sharing, click the **Sharing** menu.
    - In the lower-right corner of your desktop, click the **Sharing** button.
2. On the menu that appears, choose **Select Application**.

    The Application View dialog box appears, showing a list of all applications that are currently running on your computer.
3. Do one of the following:
    - If the application you want to share is currently running, select it in the list, and then click **Share**.
    - If the application you want to share is not currently running, click **New Application**. The New Application dialog box appears, showing a list of all applications on your computer. Select the application, and then click **Share**.

Your application appears in the sharing window the customer's screen.

Tip: Alternatively, you can share multiple applications by sharing your computer's desktop. *More...* (on page 33)

Give control of your application to a customer

You can give control of an application to your customer. If you are already showing an application to a customer, you can let the customer control it remotely without stopping the current application sharing session.

Caution: A customer who has remote control of your application can open any files associated with that application on your computer that you have not protected with a password.

1. Do one of the following:
   - On the CSR dashboard, click the **Application** tab.
   - On the icon tray, click the **Remote Control** icon.
2. Click **Share Control.**

   A message appears, informing you that the customer has received your request. Your request appears in a message box on the customer's screen. The customer must grant permission to you by clicking **OK** in the message box.
3. Click **OK** to close the message box on your computer.
   - If you are already showing an application to the customer, the customer can then click in the sharing window to gain control of the application. Skip to step **4.**
   - If you are not already showing an application with the customer, the Application Control dialog box appears, showing a list of all applications that are currently running on your computer.
4. If the Application Control dialog box appears, do one of the following:
   - If the application you want to share is currently running, select it in the list, and then click **Share.**
   - If the application you want to share is not currently running, click **New Application.** The New Application dialog box appears, showing a list of all applications on your computer appears. Select the application, and then click **Share.**
5. To temporarily take back control of your application, click your mouse in the application.

Start co-browsing from within a click-to-connect session

Before you accept a session that is invoked from a click-to-connect link, Co-browsing enables you to join the session and automatically start sharing the window from which the customer invoked the session, such as a browser or MS Outlook window. You can view or control the customer's window.

If, during the session, you end co-browsing and need to co-browse again, you can initiate co-browsing as required.

Note:

- Co-browsing requires WebACD. See your site administrator for additional information.
- Before co-browsing actually begins, the customer is asked for, and must give, permission.

1. Do one of the following:
    - On the CSR dashboard, click the **Desktop** tab.
    - On the icon tray, click the **Remote Control** icon.
    - In the multi-session window, click the Customer tab, then click the **Sharing** tab.
2. Click **Request Co-Browsing** > **View** or **Control**.

    A message appears, informing you that the customer has received your request. Your request appears in a message box on the customer's screen. The customer must grant permission to you by clicking **OK** in the message box.
3. Click **OK** to close the message box on your computer.

The click-to connect window from which your customer originally invoked the session is automatically selected as the share window.

If the original window information is unavailable, then your customer is shown the standard application selection dialog. The customer can select an application for sharing.

Print documents from a customer's computer

When controlling a customer's application or desktop during a support session, you can open a document that resides on the customer's computer and print to your local computer's default printer at your location.

1. On the remote computer, open the document to print.
2. Open the print options to display the list of printers and specify your printing options.

   This list will populate available printers from the Remote Access (CSR's) computer.
3. Print the document.

Control your view of a customer's desktop or application

When viewing or controlling a customer's desktop or application, you can specify the following options, which determine how a shared application or desktop appears on your screen:

- Display the shared desktop or application in a full-screen view or a standard window. A full-screen view of a shared application or desktop fits your entire screen and does not include a title bar or scroll bars.
- Scale, or resize, a shared desktop or application to fit the full-screen view or standard window in which it appears.

Your site administrator sets the default view for your user account.

A customer can also specify these options when viewing or controlling your desktop or application.

1. Do either of the following:
   - On the icon tray, or in the multi-session window, click the **Session** button.
   - In the title bar of the sharing window, click the **Sharing** button.
2. On the menu that appears, choose **View,** then choose an option for viewing the shared desktop or application.

Note: If you are using the screen sampling option for displaying shared desktops and applications, you can also specify the number of colors with which to view the shared desktop or application. *More...* (on page 43)

Specify the color mode for a shared desktop or application

When viewing or controlling a customer's desktop or application, you can choose one of the following color modes:

- 256 colors—Specifies that a shared desktop or application appears in 256 colors in the viewer on your screen. This option requires less bandwidth for sharing desktops or applications than does the High color option, but provides lower imaging quality. 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 desktop or application appears in 16-bit color in the viewer on your screen. This option requires more bandwidth than the **256 color** option, but provides better imaging quality.

Your site administrator sets the default color mode for your user account.

A customer can also specify a color mode when viewing or controlling your desktop or application.

1. Do either of the following:
    - On the icon tray, or in the multi-session window, click the **Session** button.
    - In the title bar of the sharing window, click the **Sharing** button.
2. On the menu that appears, choose **Color Mode**, then choose color option.

Tips for sharing desktops or applications

The following are tips that can help you to share software more effectively during a support session:

- To improve the performance of desktop and application sharing, instruct the customer to close all applications that you do not need to view or control. Closing these applications conserves processor usage and memory on the customer's computer, thus helping to ensure that the customer's client software can send images quickly during a session. Also, to ensure that a maximum amount of bandwidth is available for sharing, ask the customer to close any applications that use bandwidth, such as instant messaging or chat programs, and programs that receive streaming audio or video from the Web.

- If, during application sharing, you see a crosshatched pattern on your screen, the customer is covering a shared application with another window on his or her computer's desktop. Instruct the customer to move or close the other window.
- You can improve performance of desktop or application sharing by reducing the number of colors in which the shared software appears. *More...* (on page 43)
- It is recommended that both you and the customer use a dedicated, high-speed Internet connection when sharing an application or desktop. If you or a customer is using a dial-up Internet connection, you may notice a delay in viewing or interacting with a shared application. In this case, you can adjust the quality of the display to improve performance.

Annotate a shared desktop or application

When sharing your desktop or application, or viewing or controlling a customer's desktop or application, you can use annotation tools to draw and illustrate information on the shared screen.

All support session participants can view annotations as they are made.

Note that if you want to annotate your desktop or application, and the customer is currently controlling it remotely, you must first regain control of the application or desktop before you can open the Annotation panel.

To return to using or remotely controlling a shared desktop or application, you must first stop annotation mode.

1. On the icon tray that appears during desktop or application sharing, click the **Annotation** icon.

   If the Annotation button does not appear on the icon tray, choose **Session** > **Annotation Panel**.

   Annotation mode starts, and your mouse pointer becomes a highlighter tool with which you can begin making annotations. Note that your customer can also begin annotating at this point.

2. Optional. On the Annotation panel, select another tool for making annotations noting the following:

- To clear all annotations, click the downward-pointing arrow to the right of the Eraser button > **Clear All Annotations**.
- To clear specific annotations, click the **Eraser** button then click the annotation that you want to clear.
- To turn off the Eraser tool, click the **Eraser** button.
- To take a screen capture of your desktop, select the **Screen Capture** button on the Annotation panel and enter the information for saving your file.

3. To stop annotation mode, right-click the panel's title bar and select **Close Panel**.

   The Annotation panel closes, and the Annotation icon does not appear on the icon tray. You can re-start annotation mode by clicking the **Select Panel** button > **Annotation**.

7

Use Video

You can use video to personalize and enhance a support session:

- Let your customer see you as you provide assistance
- If your customer can send video, talk together as if you are face to face
- Show an object under discussion

Participants in your session do not require video equipment to view your video.

Minimum requirements for video conferencing

Once you start a support session, WebEx automatically detects your webcam. Most webcams that connect to your computer's USB or parallel port are compatible. The video quality can vary depending on the webcam that you use.

WebEx supports high-quality video up to 360p resolution (640x360). If your site or meeting does not support high-quality video, then standard video is used.

A system that meets the following minimum requirements can send or receive high-quality video:

Video mode	What you need
Sending	▪ A webcam capable of producing high-quality video. WebEx supports most webcams of this type ▪ A computer with at least one GB of RAM and a dual-core processor ▪ A fast network connection
Receiving	▪ A computer with at least one GB of RAM and a single-core processor ▪ A fast network connection

-

Send video

1. Do one of the following:
   - On the CSR dashboard, click the Tools tab, and then select **Video**.
   - On the icon tray, or in the multi-session window, select the video icon.

   The video panel appears.
2. Select **Start My Video**.

   Your customer can send video only after you start sending video.
3. Ask your customer to share their video by selecting **Start My Video**.
   - For the CSR, the CSR video appears on the small screen and the customer video appears on the big screen.
   - For the customer, the CSR video appears on the big screen and the customer video appears on the small screen.
   - No matter how many participants are in the session, only two people can send video: the CSR and primary customer.
4. To close the video panel, select the minimize icon on the upper right corner of the panel.

   Caution: After you minimize video, you do not stop sending it. Your video icon flashes to let you know that participants are continuing to receive your video.
5. If you or your customer wants to stop sending video, select **Stop My Video**.

Adjust video output

When sending video during a support session you can adjust video output to control

- the quality of the video image
- the resolution, or size, of the video image
- other settings that your camera supports, such as lighting and contrast

If more than one camera is attached to your computer, you can also select the video camera that you want to use.

1. On the video panel, click **Options**.
2. Adjust your video options as required.
3. Optional. To select a different video camera, in the drop-down list under **Capture Device**, select the camera that you want to use.

8

Set Up and Start One-Click Meetings

Create default settings for instant sessions

The settings you specify apply to instant sessions that you start with **Start Session** fromthe WebEx site and from **One-Click Meeting** in WebEx Productivity Tools on your desktop.

1. Log in to your WebEx Service website.
2. Select **My WebEx** > **Productivity Tools Setup** (on the left navigation bar).
3. Selec t **Set Up Now.**

   The One-Click Setup page appears.
4. Specify the default options for your instant meetings:
   - Select the default service type, or sessiontype.
   - If you want to use a session template with predefined meeting settings, select that template.
   - Specify your default session topic and password.
   - If your company requires a tracking code for identifying department, project, or other information enter it.
   - Select options for your audio connection:
     - ☐ Specify whether you are using WebEx Audio, another teleconference service, or only connecting to audio using your computer (VoIP only).

    - ☐ If your site allows Personal Conferencing, enter your default Personal Conference account number.
    - ☐ If your site uses MeetingPlace Audio, specify that information.
  - If you want to approve requests for people to join your support sessions, select **Ask for my approval when someone joins**.
  - If you want to list the support session on your Personal Meeting Room page so you can give your customers the URL to this page to join the session, select **List support session on Personal Meeting Room**.

5 Select **Save**.

SC_Start an instant session from your WebEx site

1. If you have not already done so, *set your default instant meeting settings* (on page 51).
2. Log in to your WebEx site and select **Support Center**.
3. On the left navigation bar, select **Provide Support** > **Start a Session**.
4. Select your session type or keep the default session type.
5. If your company requires tracking codes, select the tracking codes.
6. Select **Start**.

Install WebEx Productivity Tools

If your site administrator has enabled you to download WebEx Productivity Tools, you can start you can start or join meetings instantly using One-Click; start meetings instantly from other applications on your desktop, such as Microsoft Office, Web browsers, Microsoft Outlook, IBM Lotus Notes, and instant messengers; and schedule meetings using Microsoft Outlook or IBM Lotus Notes without going to your WebEx service site.

1. Log in to your WebEx site.
2. On the left navigation bar, select **Support** > **Downloads**.
3. Under "Productivity Tools," select the operating system.
4. Select **Download**.

   The File Download dialog box appears.

5 Save the installation program to your computer.

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

6 Run the installation file and follow the instructions.

7 Once you complete installation, log in using your WebEx account information and then verify your WebEx settings for Productivity Tools, including instant meetings, in the WebEx Settings dialog box.

Note: System administrators can also perform a mass installation for computers at their site. For more information, see the IT Administrator Guide for Mass Deployment of WebEx Productivity Tools at *http://support.webex.com/US/PT/wx_pt_ag.pdf* (*http://support.webex.com/US/PT/wx_pt_ag.pdf*).

Starting a One-Click Meeting

Before you start a One-Click Meeting from your WebEx Service Web site, ensure that you set up One-Click settings. For details about setting up One-Click settings, see Setting up your One-Click Meeting on the Web.

Start a One-Click meeting from the One-Click panel on Windows

1 If you have not already done so, set your default instant meeting settings.

2 Open your WebEx One-Click panel by doing *any* of the following:

- Double-click the **WebEx One-Click** shortcut on your desktop.
- Go to **Start** > **Programs** > **WebEx** > **Productivity Tools** > **WebEx One-Click**.
- Right-click the **WebEx One-Click** icon on the taskbar of your desktop.

If you did not specify automatic login, enter the required WebEx account information in the dialog box, and then click **Log In**.

3 On the WebEx One-Click panel, click **Start Meeting**.

Note: For instructions on using the WebEx One-Click panel, refer to the *WebEx One-Click User's Guide.*

Start a One-Click meeting using shortcuts

1. If you have not already done so, set your default instant meeting settings.
2. Use one of the following options to start a meeting:
    - Right-click the WebEx One-Click taskbar icon and then click **Start meeting now** to start an instant meeting.
    - Right-click the WebEx One-Click taskbar icon and then click **Start a Scheduled Meeting** to start a previously scheduled meeting
    - Select **Start Personal Conference meeting** to start a previously scheduled Personal Conference meeting.
    - Click **One-Click Meeting** in Microsoft Outlook or Lotus Notes to start a One-Click meeting.
    - From an instant messenger, such as Skype, AOL Instant Messenger, Lotus SameTime, Windows Messenger, Google Talk, or Yahoo Messenger, select **Start WebEx Meeting.**
    - From a web browser, select **Share Browser**.

Tip:

- Once you start a One-Click Meeting, it appears on your Personal Meeting Room page, unless you specified it to be an unlisted meeting. If you provide others with the URL for this page, they can quickly join your meeting by clicking the link for the meeting on this page.
- You can control which shortcuts are available in the WebEx Settings dialog box.
- For instructions on using the WebEx One-Click shortcuts, refer to the *WebEx One-Click User's Guide.*

Uninstall WebEx Productivity Tools

You can uninstall WebEx Productivity Tools at any time. Uninstalling Productivity Tools removes all Productivity Tools, including the WebEx One-Click panel and One-Click shortcuts, from your computer.

Note: If you want to keep using some Productivity Tools but disable others, edit the options in the WebEx Settings dialog box.

1. Click **Start** > **Programs** > **WebEx** > **Productivity Tools** > **Uninstall.**
2. Click **Yes** to confirm that you want to uninstall WebEx Productivity Tools.
3. Uninstall WebEx Productivity Tools from your computer's Control Panel.

9

Manage Information in My WebEx

About My WebEx

My WebEx is an area on your WebEx service Web site in which you can access your user account and personal productivity features. The following features are available, depending on the configuration of your site and user account:

- **Personal list of meetings:** Provides a list of all the online meetings that you are hosting and attending. You can view the meetings by day, week, or month, or you can view all meetings.
- **Productivity Tools Setup:** Optional feature. Lets you set up options for instant or scheduled meetings that you can start from applications on your desktop. If you install WebEx Productivity Tools, you can start or join meetings, sales meetings, training sessions, and support sessions instantly from One-Click or from other applications on your desktop, such as Microsoft Office, Web browsers, Microsoft Outlook, IBM Lotus Notes, and instant messengers. You can also schedule meetings, sales meetings, events, and training sessions using Microsoft Outlook or IBM Lotus Notes without going to your WebEx service site.
- **Personal Meeting Room:** Optional feature. A page on your WebEx service Web site on which visitors can view a list of meetings that you are hosting and join a meeting in progress. Visitors can also access and download files that you share.
- **Access Anywhere:** Optional feature. Lets you access and control a remote computer from anywhere in the world. For more information about Access Anywhere, refer to the guide Getting Started with Access Anywhere, which is available on your WebEx service Web site.

- **File storage:** Lets you store files in personal folders on your WebEx service Web site, where you can access them on any computer that has access to the Internet. Also lets you make specific files available on your Personal Meeting Room page, so visitors to your page can access them.
- **Address book:** Lets you keep information about your personal contacts on your WebEx service Web site. Using your address book, you can quickly access contacts when inviting them to a meeting.
- **User profile:** Lets you maintain your account information, such as your username, password, and contact information. Also lets you specify another user who can schedule meetings on your behalf, set options for your Personal Meeting Room page, and manage scheduling templates.
- **Web site preferences:** Lets you specify the home page for your WebEx service Web site—that is, the page that appears first whenever you access your site. If your site provides multiple languages, you can also choose a language and locale in which to display text on your site.
- **Usage reports:** Optional feature. Lets you obtain information about meetings that you hosted. If you use the Access Anywhere option, you can also obtain information about computers that you access remotely.

Register for a user account

Once you obtain a user account, you can use My WebEx features on the Web.

If your site administrator has made the self-registration feature available, you can sign up for an account on your WebEx service Web site at any time.

1. Go to your WebEx site.
2. On the navigation bar, select **Set Up** > **New Account**.

   The Sign Up page appears.
3. Provide the required information.
4. Click Sign Up Now.

   You receive an email message, confirming that you have signed up for a user account.

   Once your site administrator approves your new user account, you receive another email message containing your username and password.

Note:

- If self-registration is not available for your WebEx site, contact your administrator for an account.
- Once you obtain a user account, you can edit your user profile to change your password and provide additional personal information. You can also specify site preferences, such as your default home page and time zone.

Log in to the WebEx site

1. Go to your WebEx site.
2. In the upper-right corner of the page, select **Log In**.
3. Enter your username and password.

   Passwords are case-sensitive, so you must type your password exactly as you specified it in your user profile.
4. Select **Log In**.

Tip: If you have forgotten your username or password, click **Forgot your password**. Provide your email address, type verification characters, and then click **Submit**. You will receive an email message containing your username and password.

View your meetings list

Your list of meetings, which appears on your My Meetings page on your Support Center Web site, shows any support sessions that you are currently conducting.

To open your meetings list:

Log in to your WebEx service Web site, and then click My WebEx.

The My Meetings List shows your active support sessions.

Tip: You can specify that your My WebEx Meetings page is the home page that appears once you log in to your WebEx service Web site. For details, see *Maintaining your user profile* (on page 70).

About the My WebEx Meetings page - Daily tab

The WebEx Meetings page - Daily tab shows the daily view for your WebEx meetings. You can do the following things on this page:

- View the list of meetings you have scheduled for the current date or for another date, and start the meeting if it is close to the start time.
- View the list of meetings you are invited to for the current date or for another date, and join the meeting, if it is close to the meeting time.
- Select and delete or cancel meetings that you host.
- Select **Preferences** to change the language and time zone you want to use for your WebEx site.
- If your site is enabled for Collaboration Meeting Rooms (CMR Cloud), select **Go to Personal Room** to manage your Personal Room. For more information about Personal Rooms, see the WebEx Meeting Center with Collaboration Meeting Rooms (CMR Cloud) User Guide (Available only for Meeting Center).
- If your site does not support CMR Cloud, select Go to **Personal Meeting Room** to manage your personal meeting room.

If you want to start an instant meeting, select **Start a One-Click Meeting** (not available for Event Center).

About the My WebEx Meetings page - Weekly tab

The WebEx Meetings page - Weekly tab shows the weekly view for your WebEx meetings. You can do the following things on this page:

- View the list of meetings you have scheduled for the current week or for another week, and start the meeting if it is close to the start time.
- View the list of meetings you are invited to for the current week or for another week, and join the meeting, if it is close to the meeting time.
- Select and delete or cancel meetings that you host.
- Select **Preferences** to change the language and time zone you want to use for your WebEx site.
- If your site is enabled for Collaboration Meeting Rooms (CMR Cloud), select **Go to Personal Room** to manage your Personal Room. For more information about

Personal Rooms, see the WebEx Meeting Center with Collaboration Meeting Rooms (CMR Cloud) User Guide (Available only for Meeting Center).

- If your site does not support CMR Cloud, select Go to **Personal Meeting Room** to manage your personal meeting room.
- If you want to start an instant meeting, select **Start a One-Click Meeting** (not available for Event Center).

About the My WebEx Meetings page - Monthly tab

The WebEx Meetings page - Monthly tab shows the monthly calendar view for your WebEx meetings. You can do the following things on this page:

- View the calendar of meetings you have scheduled for the current month or for another week, and start the meeting if it is close to the start time.
- View the calendar of meetings you are invited to for the current week or for another week, and join the meeting, if it is close to the meeting time.
- Select **Preferences** to change the language and time zone you want to use for your WebEx site.
- If your site is enabled for Collaboration Meeting Rooms (CMR Cloud), select **Go to Personal Room** to manage your Personal Room. For more information about Personal Rooms, see the WebEx Meeting Center with Collaboration Meeting Rooms (CMR Cloud) User Guide (Available only for Meeting Center).
- If your site does not support CMR Cloud, select Go to **Personal Meeting Room** to manage your personal meeting room.
- If you want to start an instant meeting, select **Start a One-Click Meeting** (not available for Event Center).

About the My WebEx Meetings page - All Meetings tab

The WebEx Meetings page - All meetings tab shows the view of all of your WebEx meetings. You can do the following things on this page:

- View the list of all of the meetings you have scheduled, and start the meeting if it is close to the start time.
- View the list of all of the meetings you are invited to for the current date or for another date, and join the meeting, if it is close to the meeting time.

- Select and delete or cancel meetings that you host.
- Select **Preferences** to change the language and time zone you want to use for your WebEx site.
- If your site is enabled for Collaboration Meeting Rooms (CMR Cloud), select **Go to Personal Room** to manage your Personal Room. For more information about Personal Rooms, see the WebEx Meeting Center with Collaboration Meeting Rooms (CMR Cloud) User Guide (Available only for Meeting Center).
- If your site does not support CMR Cloud, select Go to **Personal Meeting Room** to manage your personal meeting room.
- If you want to start an instant meeting, select **Start a One-Click Meeting** (not available for Event Center).

Use Access Anywhere (My Computers)

For information about and instructions for using Access Anywhere to set up and access a remote computer, please refer to the guide *Getting Started with WebEx Access Anywhere*. This guide is available on the Support page on your WebEx service Web site.

On the My WebEx > My Computers page, you can do the following:

- Select **Set Up Computer** to set up the current computer for remote access.
- Select **Download manual installer** to download the manual installer for the Access Anywhere software.
- View your list of remote comptuers to see whether they are available or offline, and to see which applications you have allowed to access for that computer..
- Select **Connect** to connect to an available remote computer.
- Select computers you want to remove from the list and then select **Remove**.

Manage files in your personal folders

Your user account includes personal storage space for files on your WebEx site. These files are stored in My WebEx > My Files > My Documents page. The amount of space available for storing files is determined by your site administrator. If you require more disk space, contact your site administrator.

1. Go to My WebEx > My Files > My **Documents**.
2. Under **Action**, selecthe **Create Folder** button to create a new folder.

You can enter a name and a description for the folder.

3 Under **Action,**, select the **Upload** button to upload one or more files to a selected folder.

You can upload up to three files at a time.

4 Under **Action**, selectthe **Download** button to download a selected file.

Follow any instructions that your Web browser or operating system provides to download the file.

5 To edit a folder or file, select it and then select the **Edit Folder** or **Edit File** button.

For folders, you can specify the following properties:

- Name and decription
- Sharing options
  - **Do not share this folder:** This folder does not appear on your Personal Meeting Room page. Thus, visitors to your page cannot view the folder or access any files in it.
  - **Share this folder:** This folder appears on your Personal Meeting Room. You can select **With all, With users with host or attendee accounts**, or **With users with host accounts only**.
- Read and write access
- Password protection

6 If you want to search for a specific file or folder, in the **Search For** box, type all or part of the file's name or description, and then select **Search.**

7 Use the **Move** and **Copy** commands to move or copy a selected file or folder to a different folder.

8 Share a folder so it appears on your Personal Meeting Room page.

Tip:

- You can use this storage space to access important information when you are away from the office. For example, if you are on a business trip and want to share a file during an online session, you can download the file in your personal folders to a computer, and then share the file with attendees.
- If you share a folder, visitors to your Personal Meeting Room page can upload files to or download them from the folder. For example, you can use your personal folders to exchange documents that you share in your sessions, archive recorded meetings, and so on.

Manage miscellaneous recordings

When you upload other types of recordings were not recorded directly from Meeting Center , Event Center, or Training Center, they are listed on the My WebEx > My Files >My Recordings > Miscellaneous page.

1. Locate your recordings by going to **My WebEx** > **My Files** > **My Recordings** > **Miscellaneous**.
2. Select the **Playback** button to play a recording.

   ▶

3. Select the **Email** button to send an email message with a link to a recording.

   ✉

4. Select the **More** button to see more options for the recording:

   ··· ▾

   - **Download**
   - **Modify**
   - **Disable**
   - **Reassign**
   - **Delete**
5. Select the recording name link to see the Recording Information page:
   - Select **Play Now** to play the recording

   - Select **Send Email** to share your recording with others by sending an email message with a link to the recording.
   - Select or copy the streaming recording link that allows you to play the recording.
   - Select or copy the download recording link that allows you to download the file.
   - Select **Modify** to edit the recording.
   - Select **Delete** to delete the recording.
   - Select **Disable** to make the recording temporarily unavailable.
   - Select **Re-assign** to assign the recording to another host.
   - Select **Back to List** to return to your recording list.

6. Select **Add recording** to add another recording, such as a local recording recorded with the WebEx Recorder or another recording application, to your recording list.

Tip: If you download a recording to your local computer and open it with the WebEx Network Recording Player, you can convert it to another format such as Windows Media format, Flash format, or MPEG-4 format.

Maintain contact information

You can maintain a personal online address book, in which you can add information about contacts and create distribution lists. When scheduling a meeting or starting an instant meeting, you can quickly invite any contacts or distribution lists in your personal address book. You can also invite contacts in the Company Address Book for your WebEx service Web site, if one is available.

1. Select **My WebEx** > **My Contacts.**
2. In the **View** list, select **Personal Contacts** or **Company Address Book.**
3. Add contacts to your personal address book in the following ways:
   - Select **Add Contact** to specify information about contacts one at a time.
   - Select **Import** to import contact information *from your Microsoft Outlook contacts* (on page 68) or f*rom a comma-separated/comma-delimited values file (.csv)* (on page 66).
4. Edit or delete the information about any contact or distribution list in your personal address book.

5. Enter text in the **Search for** field and select **Search** to search for contacts in your presonal address book.
6. *Create a distribution list* (on page 69) in your address book.
7. To delete contacts, select one or more contacts and then select **Delete**.

Import contact information in a file to your address book

You can add information about multiple contacts simultaneously to your personal address book, by importing a comma-separated values (CSV) file. A CSV file has the **.csv** file extension; you can export information from many spreadsheet and email programs in CSV format.

1. Generate a **.csv** file from the application you want to import from, or *export a* **.csv** *file* (on page 67) from your WebEx Contacts page and then edit it to add more contacts in that format.
2. Select **My WebEx** > **My Contacts.**
3. In the **View** list, select **Personal Contacts.**
4. In the **Import From** drop-down list, select **Comma Delimited Files**.
5. Select **Import.**
6. Select the **.csv** file in which you added new contact information.
7. Select **Open**.
8. Select **Upload File**.

   The View Personal Contacts page appears, allowing you to review the contact information you are importing.
9. Select **Submit**.

   A confirmation message appears.
10. Select **Yes**.

Note: If an error exists in any new or updated contact information, a message appears, informing you that no contact information was imported.

Export contact information to a .csv file

You can save your contact information as a CSV file to import it into another application, or to generate a CSV file template that you can then use to add contact information and then *import it later* (on page 66).

1. Select **My WebEx** > **My Contacts.**
2. In the **View** list, select **Personal Contacts.**
3. Select **Export.**
4. Save the **.csv** file to your computer.
5. Open the **.csv** file that you saved in a spreadsheet program, such as Microsoft Excel.
6. Optional. If contact information exists in the file, you can delete it.
7. Specify information about the new contacts in the **.csv** file.
8. Save the **.csv** file.

Important: If you add a new contact, ensure that the UID field is blank. For information about the fields in the **.csv** file, see *About the Contact Information CSV template* (on page 67).

About the Contact Information CSV template

On your WebEx service Web site, click **My WebEx** > **My Contacts** > **View** > **Personal Address Book** > **Export.**

Specify information about multiple contacts, which you can then import to your personal address book. This list shows the fields in this template:

- **UUID**—A number that your WebEx service site creates to identify the contact. If you add a new contact to the CSV file, you must leave this field blank.
- **Name**—Required. The contact's first and last name.
- **Email**—Required. The contact's email address. The email address must be in the following format: name@company.com
- **Company**—The company or organization for which the contact works.
- **JobTitle**—The contact's position in a company or organization.
- **URL**—The URL, or Web address, for the contact's company or organization.

- **OffCntry**—The country code for the contact's office phone—that is, the number that you must dial if the contact resides in another country.
- **OffArea**—The area or city code for the contact's office phone number.
- **OffLoc**—The contact's office phone number.
- **OffExt**—The extension for the contact's office phone number, if any.
- **CellCntry**—The country code for the contact's cellular or mobile phone—that is, the number that you must dial if the contact resides in another country.
- **CellArea**—The area or city code for the contact's cellular or mobile phone number.
- **CellLoc**—The contact's cellular or mobile phone number.
- **CellExt**—The extension for the contact's cellular or mobile phone number, if any.
- **FaxCntry**—The country code for the contact's fax number—that is, the number that you must dial if the contact resides in another country.
- **FaxArea**—The area or city code for the contact's fax number.
- **FaxLoc**—The contact's fax number.
- **FaxExt**—The extension for the contact's fax machine, if any.
- **Address 1**—The contact's street address.
- **Address 2**—The additional address information, if necessary.
- **State/Province**—The contact's state or province.
- **ZIP/Postal**—The contact's ZIP or postal code.
- **Country**—The country in which the contact resides.
- **Username**—The user name with which the user logs in to your WebEx service Web site, if the contact has a user account.
- **Notes**—Any additional information about the contact.

Import contact information from Outlook to your address book

If you use Microsoft Outlook, you can import the contacts that you maintain in your Microsoft Outlook address book or folder to your personal address book on your WebEx service Web site.

1. Select **My WebEx** > **My Contacts.**
2. In the **View** list, select **Personal Contacts.**

3 In the Import from drop-down list, select **Microsoft Outlook**.

4 Select **Import**.

The Choose Profile dialog box appears.

5 In the **Profile Name** drop-down list, select the Outlook user profile that includes the contact information that you want to import.

6 Select **OK**.

Note:

- When you import contacts in Outlook, your WebEx service Web site retrieves contact information from the Outlook address book or folder in which you have chosen to keep personal addresses. For information about keeping personal addresses in Outlook, refer to Microsoft Outlook Help.
- If your personal address book already includes a contact who is also in your Outlook contacts list, the contact is *not* imported. However, if you change the contact's email address in your personal address book, importing the contact from Outlook creates a *new contact* in your personal address book.

Create a distribution list in your address book

You can create distribution lists for your personal address book. A distribution list includes two or more contacts for which you provide a common name and appears in your Personal Contacts list. For example, you can create a distribution list named **Sales Department**, which includes contacts who are members of your Sales Department. If you want to invite members of the department to a meeting, you can select the group rather than each member individually.

1 Select **My WebEx** > **My Contacts**.

2 Select **Add Distribution List**.

The Add Distribution List page appears.

3 In the **Name** box, type the name of the group.

4 Optional. In the **Description** box, type descriptive information about the group.

5 Under **Members**, locate the contacts that you want to add to the distribution list, by doing any of the following:

- Search for a contact, by typing all or part of the contact's first or last name in the **Search** box.
- Select the letter that corresponds to the first letter of the contact's first name.

- Select **All** to list all contacts in your Personal Contacts list.

6. Optional. To add a new contact to your Personal Contacts list, under **Members**, select**Add Contact**.
7. In the box on the left, select the contacts that you want to add to the distribution list.
8. Select **Add** to move contacts you selected to the box on the right.
9. After you finish adding contacts to the distribution list, select **Add** to create the list.

   In your Personal Contacts list, the **Distribution List** indicator appears to the left of the new distribution list. You can select the list name to edit it.

Edit your user profile

1. Go to **My WebEx** > **My Profile**.
2. Under "Personal Information," enter your username, name, email address, and mailing address.
3. Under "My Phone Numbers," enter your phone numbers, and then select additional options:
   - **Call-in authentication**—If enabled by your site administrator, this option allows you to be authenticated when you connect to audio without entering a meeting number whenever you dial into any CLI (caller line identification) or ANI (automatic number identification) enabled audio. Selecting this option for a phone number in your user profile maps your email address to that phone number. Caller authentication is available only if you have been invited to a meeting with CLI/ANI enabled audio by email during the meeting scheduling process.
   - **Call Back**—IIf your WebEx site has the Call Me service enabled, select this option next to a number if your site allows you to use the Call Me service so you can receive a call to that number from the meeting to connect you to audio.
   - **PIN**—If enabled by your site administrator, allows you specify a call-in authentication PIN to prevent “spoofers” from using your number to dial into a teleconference. If your site administrator sets the authentication PIN as mandatory for all accounts using call-in authentication on your site, you must specify a PIN number or caller authentication will be disabled for your account. This option is available only if you have selected the **Call-in authentication option** for at least one of the phone numbers in your profile. The PIN can also be used to provide a secondary level of authentication for

calls where the host is using the phone and may need to invite additional attendees.

4 If enabled by your administrator, select **Display partner links in My WebEx** to show partner site links in the My WebEx navigation bar

5 Specify your work hours for meeting scheduling purposes.

6 Manage scheduling templates that are available for you to schedule meetings quickly.

7 Manage your Personal Meeting Room or copy the URL to share with others.

8 Select default session options.

9 Select your default preferences for your WebEx site, including time zone, language, and locale.

10 Set the order of tabs that appear on the Support dashboard.

11 Select **Update** to save your changes.

Resetting the profile PIN for your Cisco Unified MeetingPlace audio conferencing account number

If your site includes support for Cisco Unified MeetingPlace audio conferencing, you should already have a Cisco Unified MeetingPlace audio conferencing account assigned to you. You can change the personal identification number (PIN) for your Cisco Unified MeetingPlace audio conferencing account.

To add or edit a Personal Conference number account:

1 Log in to your WebEx site,

2 Select **My WebEx** > **Personal Conferencing**.

3 Under **Change Profile PIN**, in the **New profile PIN** and **Confirm profile PIN** boxes, type new a new personal password that contains only numbers and is between 5 and 24 digits in length.

4 To synchronize your account settings for your WebEx and Cisco Unified MeetingPlace accounts, select **Sync**.

Generating Reports

You can generate usage reports that provide information about each online meeting that you have hosted on your site.

You can export or download the data to a comma-separated values (CSV) file which you can then open in a spreadsheet program such as Microsoft Excel. You can also print reports in a printer-friendly format.

To generate a report:

1. Go to **My WebEx** > **My Reports.**
2. Select the type of report you want to generate.
3. Specify your search criteria, such as a date range for which you want to view report data.
4. Select **Display Report**.
5. To change the order in which report data is sorted, select the column headings.

   The report data is sorted by the column that has an arrow next to the column heading. To reverse the sort order, click the column heading. To sort using another column, click that column's heading.
6. Do *one* of the following, as appropriate:
   - If you are viewing a general meeting usage report and want to display the report in a format that is suitable for printing, select **Printer-Friendly Format**.
7. If you are viewing the usage report for a meeting and want to view the content in the report, select the link for the meeting name.
8. To export the report data in comma-separated values (CSV) format, click **Export Report** or **Export**.
9. If available, click links on the report to display more details.

About reports

If your user account includes the reports option, you can view the following reports:

Note:

- For some reports, if you click on the report link within 15 minutes after the meeting ends, you will see a preliminary version of that report. The preliminary report provides quick access to data before the final, more accurate data is available. The preliminary report contains only a subset of the information that is available in the final report.
- When the final, more accurate data is available, which is usually 24 hours after the meeting ends, the preliminary report is replaced by the final report.
- You can download both preliminary reports and final reports as comma-separated values (CSV) files.

General Meeting Usage reports

These reports contains information about each online session that you host. You can view the following reports:

- **Summary Usage report:** Contains summary information about each meeting including topic, date, start and end time, duration, number of attendees you invited, number of invited attendees who attended, and type of voice conference you used.

Note: Initially, this report appears as a Preliminary Usage Summary Report, but after the final, more accurate usage data is available, it is replaced by the Final Usage Summary Report.

- **Summary Usage report CSV (comma-separated values) file:** Contains additional details about each meeting, including the minutes that all participants were connected to the meeting and tracking codes.
- **Session Detail report:** Contains detailed information about each participant in a meeting, including the time the participant joined and left the meeting, the attentiveness during the meeting, and any information that the attendee provided.

Note: Initially, this report appears as a Preliminary Session Detail Report, but after the final, more accurate session detail data is available, it is replaced by the Final Session Detail Report.

Access Anywhere usage report

This report shows information about the computers that you access remotely, including the date and start and end times for each session.

Support Center reports

This report contains support session information including session number, start and end times, tracking codes, and any information that the customer provided on the Pre- and Post-Session forms. If you are a manager, you can also generate reports for all users and sessions which are assigned to you.

- **Session Query tool:** You can enter search criteria and display a list of sessions that meet the search criteria you specify. The query returns the CSR name, customer name and email address, session ID, request time, date, and start and end times.
- **Call Volume report:** Shows the number of successful and abandoned requests and the minimum, average, and maximum wait and session times.
- **CSR Activity report:** Shows the number of sessions and the minimum, maximum, and average session time for each CSR.
- **URL Referral report:** Shows the URLs, the number of site visitors, and the number attempted and successful support sessions.

Generating session data: The Query Tool

You can use the Query Tool to generate a report that contains the following support session information:

- Session ID
- Session date, request, wait, start, and end times
- Queue name
- CSR name
- Customer email address

To query session data:

1. Log in to your WebEx service Web site, and then click My WebEx.
2. Click My **Reports.**

   The My Reports page appears.
3. Click **Query Session Tool.**
4. Specify appropriate date range criteria from the drop-down lists.

Note: Only three months of report data is available.

5. Only three months of report data is available.
6. Select the appropriate queues from the Queues list box or select the **All** check box.
7. Select support representatives from the CSRs list box or select the **All** check box.
8. Optional. Select additional search criteria from the **Search** string drop-down lists.
9. Optional. Indicate how you want the results sorted by selecting an item from the **Sort** results by drop-down list.
10. Click **Display Report.**

A list of support sessions based on your search criteria appears.

To export the report data in comma-delimited values (CSV) format, click **Export to CSV**.

To change the order in which report data is sorted, click the column headings.

The report data is sorted by the column that has an arrow next to the column heading. To reverse the sort order, click the column heading. To sort using another column, click that column's heading.

To display the report in a format that is suitable for printing, click **Printer-Friendly Format.**

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