

WebEx[®]
WebOffice[™]
Workgroup
FOR
DUMMIES[®]

by Rick Faulk and Maureen Condon



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Introduction



Small businesses face faster-paced, more demanding business environments than ever before. So do project teams within corporations and workgroups that cut across multiple organizations.

No matter where you work, getting “the job” done requires teamwork and collaboration that’s up-to-the-minute among colleagues whose offices may span the globe. “On-demand” is the watchword. The most current information must be available 24/7 — anywhere in the world.

Historically, business collaboration challenges have been met, progressively, by means of business travel, mail, telephone, fax, overnight delivery services, teleconferencing, and most recently e-mail. Today, WebEx WebOffice Workgroup provides a far more cost-effective immediacy for sharing work and managing projects through a business model we call Web Touch. We *touch* on that topic in just a few minutes.

By offering hosted collaboration services, WebEx WebOffice Workgroup provides its users with the technology that many tech-savvy businesses enjoy — without the expenses these businesses incur developing and maintaining these services in-house.

In *WebEx WebOffice Workgroup For Dummies*, we put you on the fast track for making these powerful, yet simple-to-use, online collaboration tools your own.

(And speaking of fast track, we’ve opted from this point forward to refer to WebEx WebOffice Workgroup as simply WebOffice. Once we get beyond the Introduction, that is.)

About This Book

This book shows you how small businesses and workgroups in companies and organizations can use the tools in WebOffice to

meet their collaboration needs. This book also gives you ideas on how you can gain real business value by using WebOffice.

Who Should Read This Book

Forward-thinking individuals and groups that want to focus on growing their businesses, without growing costly technology infrastructures, should read this book. That would include business owners and executives, and IT managers and office administrators in any industry, at any location. That would also include anyone who wants to solve the time, distance, and money problems of interacting remotely with other business people — be they coworkers, business partners, customers, sales prospects, vendors, and so on.

In short, any business that needs to be up and running fast with low cost, secure, private collaboration services available anywhere, anytime, that require no IT expertise or in-house support can benefit from reading this book about WebOffice.

How to Use This Book

You can use this book just about any way you like. You can read it like a novel from front to back to understand how to use WebOffice and the value it can bring to your business or organization. You can use it as a reference book, since that's truly what it is, for getting the most out of your WebOffice. You can even use it as a paper weight (a light-weight paper weight, that is) if you're so inclined. In fact, you'll have a lot less paper to weigh down when you manage your documents, your databases, schedules, and communications — in short, your business — online with WebOffice.

Foolish Assumptions

In writing this book, we made some assumptions about you:

- ✔ You use a PC or a Mac and a browser, and you know how to use the Internet.
- ✔ You're looking for a way to work efficiently online with others, anywhere, anytime.

- ✓ You sometimes have urgent business to conduct in real time with a remote colleague, business partner, or client.

How This Book Is Organized

WebEx WebOffice Workgroup For Dummies is broken into three parts. If you're new to the technology, you may find it helpful to read the parts in sequential order. If you simply want to get into the nuts and bolts of a specific topic, feel free to check out the table of contents or the index, find what you're looking for, and turn right to the page that covers that topic. Here's a quick rundown of what you'll find in each part.

Part I: WebOffice Workgroup

Chapters 1 and 2 in this section give you an overview of what WebOffice is and how it can solve many common collaboration problems for businesses — as well as workgroups, departments, and cross-organizational teams. And, we tell you about the new business model that WebOffice embodies — Web Touch.

Part II: Real-Time and Asynchronous Collaboration

In Chapters 3 through 7, we show you how to set up and use the WebOffice online collaboration suite of applications. You can read about how WebOffice is being used in a wide range of industries. And, we show you how easy it is to use WebOffice. (And why you really don't even need to read this book from front to back, except to get ideas about all the really cool things your business can do with WebOffice.)

Part III: The Part of Tens

A standard feature for all *For Dummies* books, each Part of Tens chapter provides ten useful bits of information for your consumption. Chapter 8 gives you ten ways to customize your WebOffice; Chapter 9 shows you the ten top items to post on your WebOffice to jump start usage.

Icons Used in This Book

Throughout this book, you find icons in the margins, marking specific paragraphs. Here's what the icons indicate:



Whenever you see this icon, you're being signaled that the information is especially important to know.



This icon alerts you to shortcuts or other valuable hints related to the topic at hand.



Should you see this icon, run for cover. No, seriously. What this icon points out is information that's, well, really technical. You may want to skip it (or read it when no one else is looking).

Where to Go from Here

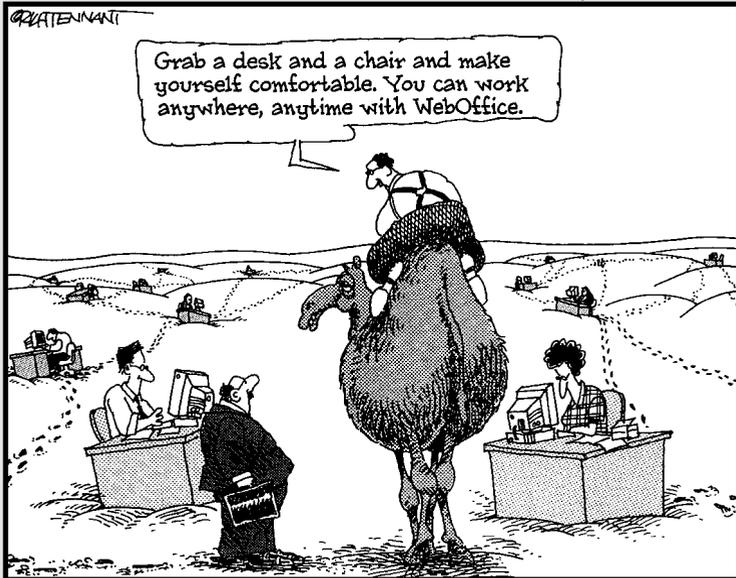
As interesting as this book is, you won't hurt our feelings if you don't read it from cover to cover. In fact, we wrote this book with the thought that after you read a few chapters and see how easy WebOffice is to use, you probably would get so excited about it, you would just dive in and start using WebOffice like a pro. So, feel free to simply leave this book next to your coffee cup and use it as a handy reference.

Part I

WebOffice Workgroup

The 5th Wave

By Rich Tennant



In this part . . .

We wax existential. What is WebEx WebOffice Workgroup? Why is it here? Where can you go with it? What does it all mean? In Chapter 1, we tell you what each of the applications in the WebOffice suite can do for you. In Chapter 2, you get the scoop on why a hosted collaboration service, like WebOffice, meets the needs of small businesses and workgroups.

Chapter 1

Working Together Just Got Easier

.....

In This Chapter

- ▶ Finding out about WebOffice
 - ▶ Exploring online collaboration
-

Whether you run a small business, a project team, a cross-disciplinary workgroup, or a department, the Internet and all of its accompanying technology have profoundly impacted your world. Your work pace is faster. Your work force is geographically scattered. Your clients/customers are demanding new products and services at an increasingly rapid rate. And of course, in today's economy, your costs are skyrocketing.

You *want* a new way to work! You *want* a way to enable your workgroup — whatever its mission or scope — to work better, faster, and more cost-effectively to turn out products and services to keep you competitive in today's business technology matrix.

WebOffice is *the way* to go.

In this chapter, we show you WebOffice, which allows you to increase your organization's productivity — providing new ways to work together online anytime, anywhere.

What Is WebOffice?

WebOffice (check out Figure 1-1 for a look at a sample Home page) is a suite of online collaboration tools that allow you and your team to share information and work together more effectively from wherever you are. We discuss these collaboration tools in the following sections, listed in the order we think you'll want to start using them.



Figure 1-1: Sample WebOffice Home page.

Group Calendar

The Group Calendar allows you to schedule meetings, WebEx Meetings, events, appointments, and recurring meetings with e-mail reminders to participants. You can

- Share your calendar with colleagues while maintaining the privacy of your personal appointments and events.
- Coordinate your workgroup's schedules from one place.
- Schedule meetings and WebEx Meetings.
- Check participant availability online for meetings and WebEx Meetings.

- ✔ Send meeting invitations via e-mail, attaching relevant documents, agendas, or directions.
- ✔ Reserve conference and meeting rooms.
- ✔ Sync with Palm and Outlook.

Document Manager

Whether you're at the office, on the road, or working from home, the Document Manager allows you and your colleagues to manage and share all of your documents and files from anywhere. You can

- ✔ Organize and access your files online.
- ✔ Publish documents company-wide.
- ✔ Drag and drop files for easy uploading.
- ✔ Protect access to documents and files through a permissions-based and password-protected system.
- ✔ Create folders and subfolders for each department, project, remote workgroup, and so on.
- ✔ Create a central repository for all your company's important documents, so that all employees can access them, anywhere, anytime.
- ✔ Use the Full-Text Search upgrade to pinpoint information you need in seconds.

Database Manager

The Database Manager allows you to organize, store, and share your important business information with ease. Finally, sales reports, client records, project deadlines, knowledge bases, and inventory reports are located in one centralized place. You can

- ✔ Build databases quickly and easily
- ✔ Share information with remote or mobile workers
- ✔ Sort, group, and filter your data
- ✔ Access your data instantly, 24 hours a day, 365 days a year

- ✔ Format database reports for printing
- ✔ Import and export data to save time and increase accuracy
- ✔ Use calculated fields for deriving new information from your database

WebEx Meetings

WebEx Meetings is a powerful meeting tool that lets you meet online with participants you choose worldwide — whenever and wherever you happen to be at the moment. You can

- ✔ Improve business relationships with partners, customers, vendors, remote employees, and other colleagues through Web Touch — the new business model embodied in WebEx Meetings. (We talk more about Web Touch in Chapter 2.)
- ✔ Save time and money on business travel for training, partnering, sales, and marketing by meeting in real time, online instead.
- ✔ Peak prospects' interest and close deals more quickly by sharing presentations, applications, and your desktop in real time.
- ✔ Engage meeting attendees and get your ideas across more effectively through online chats, polling, teleconferencing, and passing the *presentation ball* (see Chapter 6) to attendees.
- ✔ Receive faster feedback from meeting invitees, through e-mail RSVPs.
- ✔ Easily retrieve participant contact data for follow-up purposes, through WebEx Meetings Event Registration.

Task Manager

The Task Manager allows you to manage multiple projects, coordinate local and remote project teams, and track progress to deliver results. You can

- ✔ Delegate tasks to other WebOffice members, or keep the tasks on your own to-do list.

- ✔ Monitor the status of tasks associated with various projects, tracking by project, owner, and date.
- ✔ Assign permissions so that team members only see tasks that relate to their project.
- ✔ Synchronize tasks with your Palm handheld or Microsoft Outlook so that action items are always at your fingertips.

Announcements

Announcements allow you to post important information on your WebOffice Home page using simple text, graphics, and photos. You can

- ✔ Use colors and font changes to create online newsletters for your organization.
- ✔ Automatically notify members of new announcements.
- ✔ Mark a new announcement as “urgent.”
- ✔ Link Announcements to documents, databases, and Web pages.
- ✔ Set an automatic expiration date so that the announcement does not display on the Home page after the expiration date.

Discussion Forums

Discussion Forums allow you to create online ongoing discussions. Discussion Forums are more comprehensive than chat sessions or e-mail because you can keep a permanent history of conversations among all users. You can

- ✔ Brainstorm effectively with colleagues, even if you can't get together in the same place at the same time.
- ✔ Protect confidential information by controlling, through secure permissions, which individuals or groups have the right to read or contribute to a particular discussion.
- ✔ Keep everyone up-to-date by notifying forum members when you make changes to a discussion topic or create a new forum.

- ✔ Illustrate your points to colleagues more effectively by attaching documents and files to individual discussion contributions.
- ✔ Sort, expand, and collapse topics within Discussion Forums for easy reading.
- ✔ Search efficiently for a discussion thread by title or keyword.

Opinion Polls

Opinion Polls allow you to create single-answer or multiple-answer polls. You can

- ✔ Poll with anonymous or open voting.
- ✔ Share poll results with respondents.
- ✔ Notify participants automatically that a poll has been created and requires response.
- ✔ See response progress with real-time graphs.
- ✔ Let members view a running tally of votes, or hold the results until the poll is closed.
- ✔ Activate, deactivate, or purge surveys.
- ✔ Set response limits and cut-off dates.
- ✔ View reports and publish results.

Contact Directories

Contact Directories allow you to manage information for contacts both inside and outside your company. The Contact Directories application allows you to

- ✔ List all of your WebOffice members along with their job titles, photographs, phone and fax numbers, and e-mail and street addresses.
- ✔ Store all of your information about outside suppliers, clients, partners, vendors, and so on.

- ✔ Grant access to member information for remote employees so that they can identify or reach co-workers.
- ✔ Keep your outside contact information private or share it with others in your organization.

Expense Reports

Expense Reports provide a standard interactive form for employees to submit all work-related expenses for reimbursement. You can customize the Expense Reports application to meet your company's needs by defining expense categories, mileage reimbursement rates, and local currency. Expense Reports allow you to

- ✔ Manage your travel and entertainment reporting for employees and accounting personnel.
- ✔ Keep an accurate record of all expense reports filed.
- ✔ Retain the privacy of your expense information and access it instantly, no matter where you are.

Administration Tools

Administration Tools allow you to customize the look and feel, control access, and monitor usage of your WebOffice, so that you can easily integrate WebOffice into your daily operations. Administration Tools allow you to

- ✔ Customize your WebOffice to match your company's identity.
- ✔ Configure the layout of your Home page by turning applications on or off.
- ✔ Set permissions to limit access to specific content areas.
- ✔ Create member groups for efficient communication.

Realizing You're Never Alone

WebOffice members are never alone. After all, what is collaboration if it isn't about sharing? It's certainly not about being alone.

WebOffice members can be in touch with each other, anywhere, anytime. And, even though the WebOffice suite of tools is really easy to use, WebOffice offers an extensive system of Online Help — to keep you from ever being lonely. That's right, help that's always there for you, the perfect companion — the strong, silent type — and only a click away.

That's not all. WebOffice users have other sources of help. They're called WebOffice administrators and are typically the lucky members who subscribe to the service first. Administrators' responsibilities are few but their powers are plentiful. Future administrators, feel free to jump ahead to Chapter 8 in particular and discover all the fun you can have customizing your WebOffice to suit the style and needs of your company or organization.



And, of course, WebOffice users can always contact WebEx Customer Service for help via e-mail or telephone. You can find our contact information on our Web site, www.weboffice.com.

Chapter 2

Taking Advantage of Hosted Collaboration

.....

In This Chapter

- ▶ Discovering the online advantage
 - ▶ Gaining real business value
 - ▶ Finding out about Web Touch
 - ▶ Putting WebOffice to the test
-

Many companies often consider custom building their own collaboration services in-house. Such a strategy requires dedicated human resources, substantial funding, and lengthy ramp-up times. Most businesses, and small businesses in particular, would find this route prohibitive.

So, instead, many businesses are opting to use hosted collaboration services. That way, a third party vendor takes on the responsibility of keeping the service up and running seamlessly.

In this chapter, we discuss in detail the reasons for choosing a hosted collaboration service, available online, rather than custom building such a service in-house. We review the business value of hosted services for a wide range of businesses. We also give you a quick quiz that reveals whether you can benefit from having a hosted collaboration service.

Choosing a Hosted Service

Small businesses, as well as project teams in organizations, frequently don't have a lot of lead time to meet any given business challenge. Mobilizing available resources quickly,

inexpensively, and with an eye to effectiveness are all paramount.

In such a situation, a ready-made solution that can be quickly customized offers much greater business value than a solution that may take months to implement in-house and requires a budget that's bulging at the seams.

Here are six reasons for choosing a hosted collaboration service versus building a collaboration service in-house:

- ✔ **Zero hardware or software to buy.** You don't have to buy, install, or maintain any hardware or software. Flexible monthly or annual pricing plans provide predictable costs.
- ✔ **Rapid setup and deployment.** You can set up WebOffice in five minutes and have it fully operational the very same day.
- ✔ **Global access.** You leverage the power and flexibility of the Internet to obtain anytime, anyplace access for remote workers without having to build in-house custom firewalls and VPNs.



A *VPN* (virtual private network) uses a public telecommunication infrastructure, such as the Internet, to provide remote offices or individual users with secure access to their organization's network.

- ✔ **Product enhancements.** WebEx leverages feedback from WebOffice users worldwide to add new applications and features to WebOffice on an ongoing basis. WebOffice users don't have to worry about downloading large software files in order to get new upgrades to the service. This hosted service makes all service upgrades automatically and seamlessly. As a user, you can sit back and relax.
- ✔ **Reliability, performance, and security.** WebEx monitors its data center 24/7 to ensure high availability, and nightly backs up all customer data. Without a hosted service, this level of security and support would require dedicated IT resources, dramatically increasing the total cost of ownership.
- ✔ **Customization.** You can control a rich set of configuration and customization options for your company's WebOffice site, using only a Web browser. If you need more customization, you can do so with the help of WebOffice developers.

Okay, What's the Business Value?

Small businesses, project teams, cross-disciplinary teams, and departments in corporations, use WebOffice to keep their work flowing freely, smoothly, and quickly. Doing so saves money, creates efficiencies, and increases overall productivity among business users.

The variety of companies and work groups using WebOffice is broad. The following is a sampling of usages for WebOffice by businesses across many industries.

Financial Services firms

You can use WebOffice for a wide range of activities. You can

- ✔ Present quarterly reports to investors and train branch personnel on compliance regulations using WebEx Meetings.
- ✔ Make large confidential financial documents available immediately — securely, via PC/browser, 24/7, using the Document Manager.
- ✔ Track and manage the progress of thousands of sales leads using the Database Manager.
- ✔ Schedule board meetings using the Group Calendar.
- ✔ Notify bank tellers and sales reps about rate changes, fee schedules, and new products with the WebOffice Announcements Board.
- ✔ Keep employees up-to-date on federal, state, and local banking regulations with the Document Manager.

Healthcare firms

You can share policies, procedures, and programs inter-departmentally and with remote facilities. You can also do the following:

- ✔ Share patient information using the Database Manager.
- ✔ Share medical imaging with remote consultants for diagnostic purposes using WebEx Meetings.
- ✔ Schedule coverage of doctors and other medical personnel in multiple facilities using the Group Calendar.

Marketing and PR agencies

WebOffice allows you to run offices and work with clients worldwide. You can

- ✔ Review ad copy and layouts online with the Document Manger.
- ✔ Archive logos and artwork in a central repository using the Document Manager and Database Manager.
- ✔ Track print collateral and print, TV, and radio ad production with the Database Manager.
- ✔ Brainstorm creative ideas with Discussion Forums.

Consulting firms

Using WebOffice, you can manage projects with the Group Calendar, Document Manager, Task Manager, and Database Manager. Here's a couple more things you can do:

- ✔ Build Customer Relationship Management systems, using the Database Manager.
- ✔ Profile customers using the Database Manager and Document Manager.
- ✔ Access critical customer information and materials via WebOffice while onsite at your client's location.

Real estate agencies

You can use WebOffice to coordinate offices from coast to coast. You can

- ✔ Schedule appointments and closings using the Group Calendar.
- ✔ Share real estate forms using the Document Manager.
- ✔ Share client information using the Database Manager.

Nonprofit agencies and community activist groups

Using WebOffice, you can manage schedules and activities of large numbers of volunteers with the Group Calendar. You also can

- ✔ Maintain interest in issues in between meetings using Discussion Forums.
- ✔ Track members, volunteers, donors, and so on, using the Database Manager or the Members Directory.
- ✔ Maintain current procedure and policy documents using the Document Manager.

Technology firms

You can utilize WebOffice to manage projects with the Task Manager. You can also

- ✔ Deliver software updates and releases to clients via the WebOffice Document Manager, eliminating the need for overnight delivery or on-site visits.
- ✔ Build customer-relationship management systems via the Database Manager.
- ✔ Use WebEx Meetings to train your sales force in the use of your product.

Okay, you get the idea. Virtually any business can improve internal productivity and save money with a hosted service like WebOffice, versus custom building a collaboration service in-house.

Building Business Bridges

Beyond the uses for WebOffice inside a company, a wide range of companies use WebOffice as their Business-to-Business (B2B) bridge. These companies use WebOffice as an extranet to collaborate with clients, customers, partners, and so on.

For example, advertising agencies use WebOffice to revise marketing materials with their clients. Agencies can post drafts of brochures, catalogues, advertisements, direct-mail pieces, and more on WebOffice. In turn, clients can review and revise these materials and post their changes on WebOffice at their leisure. Many agencies also use WebOffice to share advertising files with their clients' other vendors, such as PR firms and direct-mail houses.

We could give you many more examples of how business users are extending their business reach with WebOffice, but you get the idea.

So, instead, right now, we want to turn your attention to the business model behind WebOffice — the Web Touch business model — and tell you just a little bit about that.

So Really, What's All This about Web Touch?

Web Touch is a new business model that describes the Internet-enabled process that allows companies to develop and maintain more effective business relationships than ever before possible through traditional means.

Traditionally, the strongest business relationships were maintained by *high-touch* (face-to-face) interactions, such as sales and customer service calls, executive on-site meetings, and so on. These interactions, while fruitful, were expensive, time consuming, and probably not always productive enough to justify the cost or time on the road spent away from family.

Today, the Web Touch business model allows its practitioners to develop and maintain more effective business relationships — without the hassle and expense of hopping in a car, train, or

plane — by utilizing cost-effective, Web-based collaboration technology.

With the Web Touch business model, embodied in WebOffice, and in particular in the WebEx Meetings application, business users can have it all — high quality and high quantity — in their business interactions. They can schedule Web-based meetings in advance, or spontaneously, and share presentations, documents, spreadsheets, and other files, whenever they need to — with dozens of business contacts each week.

As a result, WebOffice users can get the benefit of the old high-touch model — stronger business relationships — and they also can reap these additional benefits: accelerated business velocity, increased customer reach, improved productivity, and lower costs.

Putting WebOffice to the Test

To see whether you can gain business value from using a hosted service like WebOffice inside your company or organization, or outside with partners, customers, and vendors, all you need to do is answer the following questions:

- ✔ Could your company use an online group calendar for scheduling appointments?
- ✔ Could your company use a central online repository for file sharing and editing? A repository that all or designated employees can access anywhere, anytime?
- ✔ Do you need online databases that all or designated employees can access whenever and wherever?
- ✔ Would you like to spend less on travel for training, sales, customer support, or product development?
- ✔ Could you improve task management and project management operations?
- ✔ Could you improve employee communications with a new company-wide announcement system and a new online system for getting employee input?
- ✔ Could you communicate better with business partners, clients, vendors, suppliers, and so on?

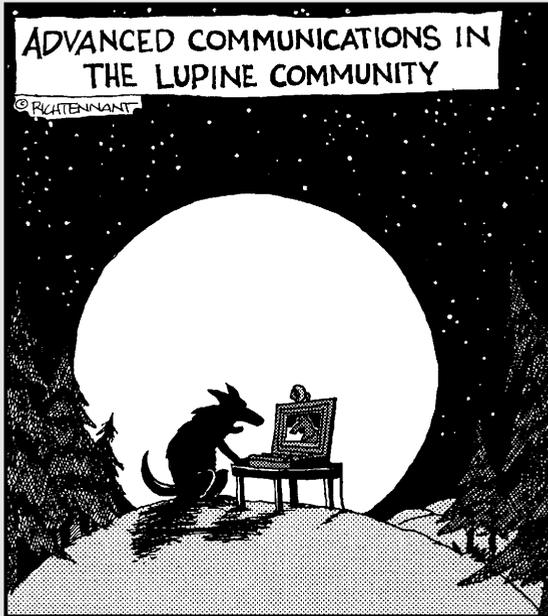
If you answered “yes” to any of these questions, you could gain real business value by having your own WebOffice. In the following chapters, we show you how easy it is to use the WebOffice suite to do just that.

Part II

Real-Time and Asynchronous Collaboration

The 5th Wave

By Rich Tennant



"The really great thing about WebOffice is I can still howl with the pack even when I can't leave the den."

In this part . . .

We get down and dirty. We show you how to start using WebEx WebOffice applications, step by step. We show you how small businesses and corporate workgroups use WebOffice to meet their day-to-day business challenges. And, we give you lots of really cool ideas about how you can use WebOffice to make your work life easier.

Chapter 3

Using Your Group Calendar

In This Chapter

- ▶ Getting an overview of your Online Calendar
- ▶ Scheduling meetings, WebEx Meetings, and company-wide events
- ▶ Sharing your schedule while maintaining privacy
- ▶ Synchronizing your Online Calendar with a PDA or Microsoft Outlook

The WebOffice Online Calendar helps you and your team keep track of personal appointments, group meetings, WebEx Meetings, recurring meetings, company-wide events and more.

Whether you're in the office, on the road, or working at home, you always have access to the latest scheduling information for yourself and your co-workers. And, you can always schedule, launch, or join a WebEx Meeting (see details in Chapter 6).

In this chapter, we show you how to use WebOffice to schedule both the old-fashioned on-site meetings and events, and WebEx Meetings that allow you to meet online with anyone, anywhere, in real time. You find out how to send invitations, check for conflicts in invitees' schedules, and even check for the availability of your meeting room for on-site meetings. We also show you how to set up meeting reminders, check RSVPs, schedule company meetings, and log personal events that show up only on your calendar. Finally, we show you how to sync your calendar with two systems — a Palm handheld device and Microsoft Outlook.

Creating Meetings and Events

With the WebOffice group calendar you can manage and coordinate your entire team or organization's schedules from one

location, regardless of where you are. You can create on-site meetings and events, and you can launch WebEx Meetings with participants anywhere in the world. You can check participant availability, send meeting invitations, and reserve a conference room right from your desktop — resting assured that you've chosen a time when your specified meeting participants are not already booked. You can also make any event you create a recurring event, such as weekly staff meetings, biweekly meetings, or monthly team update meetings.

The following steps show you how to set up an on-site meeting or event and also how to set up a WebEx Meeting.

- 1. On the left menu of your WebOffice Home page, click Calendar.** The Events for (Today's Date) Calendar page appears.



The Events for (Today's Date) page is the default view. To change the default view, click Settings in the top menu bar and choose your default view as Events for (This Week) or Events for (This Month). Click Save. The Events for (your choice of view) appear.

- 2. Click New.** The New Event page appears.
- 3. Fill in the event details in the fields, as shown in Figure 3-1.** You can attach a file of any kind — agenda, plans, budgets, directions, and so on — and that attachment is available to participants when they view the e-mail invitation.

The screenshot shows the 'New Event' form with the following fields and options:

- Title:** A text input field with a 'Required' label.
- This Is For:** Radio buttons for 'Me only', 'Everyone', and 'Selected Members (Choose Participants)'. 'Selected Members' is selected.
- Start Time:** Date: October 18, 2005; Time: 10 AM; Zone: EDT. There is an 'All Day' checkbox.
- End Time:** Date: October 18, 2005; Time: 11 AM; Zone: EDT.
- Show Time As:** A dropdown menu set to 'Busy'.
- Location:** A dropdown menu and an 'Other:' text input field. A link 'See if location is available' is present.
- Description:** A large text area.
- Highlight color:** A dropdown menu set to 'Gold'.
- File:** A text input field, a 'Browse...' button, and a 'Show Image' checkbox.
- Mark as private:** A checkbox with the text '(Hide the details of this event from people I share my calendar with)'. It is currently unchecked.

Figure 3-1: Fill in the event details on the New Event page.

4. **Click the Participants tab.** A screen appears in which you select the members and groups you want to invite to your meeting. You can also check the availability of invitees who are members of your WebOffice.
5. **Click the drop-down menu to select members of your WebOffice to invite to your meeting.**
6. **Click the Check Availability box, as shown in Figure 3-2.** You see a calendar that shows your WebOffice participants as free, busy, or out of the office for the time slot you designated.

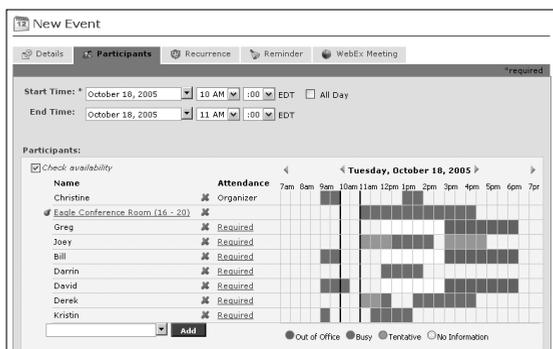


Figure 3-2: You can check your WebOffice participants' availability, as shown here.

7. **After you select all members and confirm their availability, you can also invite people outside your WebOffice members to your meeting.**

- **To invite anyone in your WebOffice Contacts group:** Scroll down the Participants tab. In the Choose a Contact drop-down menu, highlight the name of the first contact you want to add to your invitee list and then click the Add button. Continue adding each contact individually until you have invited everyone you want.
- **To invite people who are neither WebOffice members nor contacts:** Type the e-mail addresses in the Enter Email Addresses input box, separating the addresses by commas, semicolons, or spaces, and then click the Add button beside the input box to invite them to your meeting.

8. **To make your meeting a recurring event, click the Recurrence tab on the New Event screen.**
The Recurrence tab comes to the foreground.
9. **Enter the information required to define how often you want your event to recur.** Don't click Save yet.
10. **Click the Reminder tab on the New Event page.** You can choose to send an e-mail reminder to yourself only or to specific invitees.
11. **To send a reminder to specific invitees, choose Just the People Specified Below. In the drop-down menu below, select the invitees and click the Add button.**
All the invitees you select will receive an e-mail reminder for the meeting or event.
12. **In the Send Reminder drop-down menu, select the timing of the e-mail reminder (from 15 minutes to 2 weeks prior to the meeting) and, unless you want to make your meeting a WebEx Meeting, click Save.**



If you want your meeting to be a WebEx Meeting, do not click Save yet, but instead follow these optional steps.

- a. **If you want your meeting to be a WebEx Meeting, click the WebEx Meeting tab.** The WebEx Meeting tab comes to the foreground.
 - b. **Check the box for WebEx Meeting.** The tab expands with a list of check boxes.
 - c. **Select your desired options on the New Event page WebEx Meeting tab.** (Refer to Chapter 6 to read all about WebEx Meetings.)
13. **After you set all the specifics for your meeting, click Save.** A Notify pop-up box appears giving you a choice of Send an Invitation (Response Required), Send a Notification (No Response Required), or Don't Notify.
 14. **Make your selection, then click OK.** Your Meeting Details tab appears. This tab contains the name of the meeting and important details about the meeting.

Getting Real Business Value

Businesses worldwide use the WebOffice group calendar to schedule and track appointments, meetings, WebEx Meetings, and events.

From financial services firms and real estate companies to nonprofit agencies and consultants, WebOffice users employ the group calendar to schedule important meetings and events from wherever they are. All you need is a computer and an Internet connection, and you can coordinate a meeting on the Web, or down the hall, in a matter of minutes. Here are examples of how some of these companies and organizations get business value from using the WebOffice Calendar.

- ✔ **Real estate companies:** Maintain master schedule for closings for multiple agents. Individual agents manage schedules for home showings and open houses.
- ✔ **Consultants:** Replace Microsoft Exchange and save on maintenance effort and cost. Schedule client meetings, including off-site and on-site visits, and WebEx Meetings.
- ✔ **Advertising and PR agencies:** Use Group Calendar as the hub of operations for multi-site agencies, scheduling resources and personnel for assignments, and scheduling on-location and WebEx Meetings.
- ✔ **Pharmaceutical and medical device firms:** Schedule client visits and WebEx Meetings, and track trade shows.
- ✔ **Nonprofit agencies:** Manage the work schedules of hundreds of employees and volunteers.
- ✔ **Election campaign management firms:** Make notations and briefs for candidates on the online calendar for upcoming speaking events. Schedule volunteers.
- ✔ **Retail store chains:** Track multiple schedules and meetings for personnel managing remote stores and schedule WebEx Meetings for training remote employees.
- ✔ **University departments:** Schedule department personnel working on thousands of projects each year.
- ✔ **Event and meeting planning firms:** Track staff and event schedules. Track vendor meetings and delivery of supplies for events.

Check out Figure 3-3 for a sample Calendar Month View.

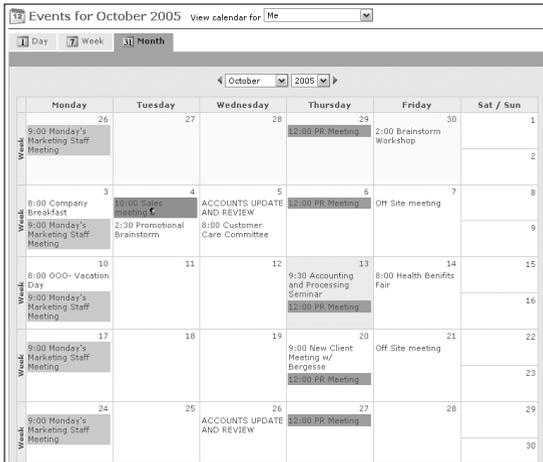


Figure 3-3: A Calendar Month View.

Setting Your Calendar Preferences

You can set your own preferences for sharing, or not sharing, your calendar with colleagues. Here's how:

1. In the menu at the left of your WebOffice Home page, click **Calendar**. The Events for (Today's Date) screen appears.
2. Click the **Settings** button. The Member Options screen appears with the Calendar tab showing.
3. Enter requested information in the boxes to suit your own **Calendar Preferences**, as shown in Figure 3-4.
4. Scroll down the page to the **Calendar Sharing** section and check your preference for sharing your calendar or keeping it private. You can specify different levels of access for individual members.

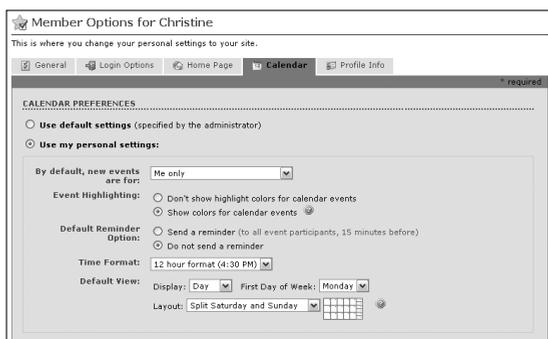


Figure 3-4: The Calendar Preferences section on the Calendar tab.

5. Highlight the names in the Member list box and use the arrow to place names in the Access Level box, as shown in Figure 3-5.

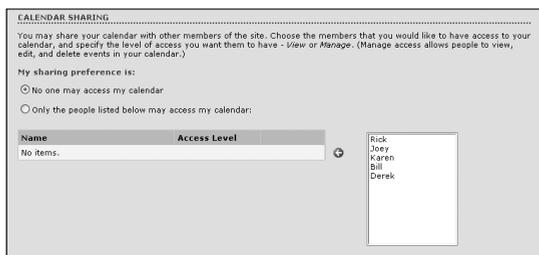


Figure 3-5: The Calendar Sharing section on the Calendar tab.

Syncing Your Calendar with a PDA or Microsoft Outlook

With Intellisync for WebEx, you can synchronize your calendar appointments with Palm handheld or Microsoft Outlook so that you and your colleagues can access your schedule at all times from any location.

Intellisync for WebEx, a downloadable application, lets you:

- ✔ Carry wherever you go an up-to-date copy of your contacts and members lists on your Palm Pilot.
- ✔ Maintain your complete calendar online, including personal appointments and tasks.
- ✔ Download your WebOffice calendar events to your Palm or Microsoft Outlook.
- ✔ Populate your WebOffice contacts list instantly by uploading contacts from Outlook or your Palm.

You may import, export, and synchronize data with the following WebOffice applications: Calendar, Contacts, Members (export from), and Task Manager.



Intellisync for WebEx works with Microsoft Outlook 97, 98, 2000, 2002, 2003, or a Palm Pilot III, V, VII connected to your computer with Palm HotSync. Your PC's operating system must be Microsoft Windows 95, 98, 2000, NT 4.0, or XP.

To download Intellisync for WebEx,

- 1. Click Tools in the left menu on your WebOffice Home page.** The Tools page appears.
- 2. Click the Utilities link.** The WebOffice Utilities page appears.
- 3. Click the Synchronization link.** The Synchronize page appears with instructions for downloading Intellisync for WebEx.

Chapter 4

Sharing and Organizing Documents

.....

In This Chapter

- ▶ Gaining real business value by managing your documents online
 - ▶ Using check in, check out when updating documents
 - ▶ Informing members about new documents
 - ▶ Working with Web folders
 - ▶ Looking for documents
-

The WebOffice Document Manager lets you share files with other members of your WebOffice site: text documents, spreadsheets, PowerPoint presentations, you name it — files both large and small. You can post these files in an online folder just like you do in any Windows-based environment and share them anytime, anywhere, with your WebOffice members.

In this chapter, we tell you how to upload files into the Document Manager. You find out how to edit files, search for files, and notify other members of newly posted documents. You even find out how to set permissions for those who can access files and documents. We also show you how to organize the files into folders that you can use just like any other folders on your Windows desktop. And, we give you examples of how online document repositories, created in a wide range of businesses and industries, are providing real business value.

Gaining Business Value

With WebOffice, you can create individual and/or shared file and document folders to suit your needs, no matter what business, industry sector, or part of an organization you work in. The industry applications list is virtually unlimited.

Whether you're in sales, marketing, human resources, research and development, or any other part of an organization, you can create one place to share and organize all your files. Within your WebOffice Document Manager, you can create folders and sub-folders to better organize company documents. You can create a folder for each department, project, or workgroup for logical, easy access by any authorized user. For example, you can create a Sales Team folder containing the latest price sheets, electronic marketing and sales brochures, sales presentations, contracts, and order forms. Or, you can create a Human Resources folder containing the latest job requisitions, postings, and so on.

Remote workers or traveling employees always have access to the right file and timely information because these are available online.

Here's a sampling of how assorted types of organizations use the WebOffice Document Manager in a wide variety of applications:

- ✔ **Sales organizations:** Keep their sales force up-to-date by posting the latest version of constantly changing marketing literature.
- ✔ **PR and ad agencies:** Share, develop, edit, and review marketing literature with clients, vendors, freelancers, and other agencies and partners.
- ✔ **Consultants:** Create central repositories of critical documents that need to be accessed both at headquarters and during client on-site visits. IT consultants create client profiles of hardware and software. Management consultants share plans, budgets, organizational charts, and so on.
- ✔ **Manufacturing companies:** Manage product specifications and certifications in a central repository.
- ✔ **Human resources departments:** Share company policies, benefits, handbooks, organizational charts, and other employee-related documents.

- ✔ **Educational institutions:** Share course curriculum and course content.
- ✔ **Photo departments of magazine publishers:** Upload and share large digital files.
- ✔ **Nonprofit organizations:** Share, review, update organizational documents, by-laws, meeting minutes, and budgets.
- ✔ **Banks and credit unions:** Post and share internally: compliance regulations, other operating documents, and human resources documents.
- ✔ **Healthcare organizations:** Post and share patient data and medical imagery, standard documents, best practices, training materials, funding proposals, and marketing materials.
- ✔ **Real estate agencies:** Post operating procedures and standardized forms to be used with clients so that they can be downloaded anywhere — at an open house, private home showing, or at a closing.
- ✔ **Financial services firms:** Post sales presentations, latest financial news, and company data for sales team uses. Sales reps log in remotely and update presentations; everyone has access to the most current version.

Posting Your Documents in One Place Online

To find out how to create your centralized document repository and fill it with documents, check out the following sections, which walk you through the steps for creating a new folder, setting up permissions, and adding documents to your new folder.

Creating a New Folder

Creating folders is a great way to keep everything organized. You can have a single folder function as your central document repository and then have subfolders within it. You can also have additional folders outside your central document repository for any number of other topics. The WebOffice Document Manager lets you name and layer your folders to meet your business's or organization's needs.

Here's how to create a new folder.



1. **In the Menu at the left of your Home page, click Documents.** The Documents (Group Documents) page, as shown in Figure 4-1, appears.
2. **Click the arrow on the New button in the top menu bar.** A submenu appears.
3. **Select New Folder.** The New Folder page appears.
4. **Type the name of your New Folder, or documents repository in the Name box.**
5. **In the Located In box, highlight the folder in which you want to place your New Folder.**

Note: You must place your first New Folder in the Group Documents Folder. You can put all subsequent folders either in the Group Documents Folder or in subfolders within the Group Documents Folder.

6. **Click Save.** Your New Folder, or centralized repository, now appears in the list of folders on the Group Documents page.

Now, you're ready to designate which members of your WebOffice will have access to this documents repository, or Folder.

Documents (Group Documents)

Exchange files of all types in the Document Manager. Upload, edit, and manage these files directly from Windows Explorer when you set up a Web Folder for your web office.

Search: [Advanced Search](#) 0 documents

All Folders | **Group Documents**

Sort By: Title Show folders

<input type="checkbox"/>	Title	File	Size	Posted By	Modified
<input type="checkbox"/>	Accounts		9 Items		
<input type="checkbox"/>	AD Workshop		6 Items		
<input type="checkbox"/>	Executives		1 Item		
<input type="checkbox"/>	Finance		5 Items		
<input type="checkbox"/>	HR		3 Items		
<input type="checkbox"/>	IDC misc		5 Items		
<input type="checkbox"/>	IT		4 Items		
<input type="checkbox"/>	Marketing		8 Items		
<input type="checkbox"/>	Photos		3 Items		
<input type="checkbox"/>	PR		4 Items		
<input type="checkbox"/>	Promotions		8 Items		
<input type="checkbox"/>	QE		9 Items		
<input type="checkbox"/>	Sales		16 Items		
<input type="checkbox"/>	Specials		6 Items		
<input type="checkbox"/>	Support		1 Item		

Figure 4-1: The Documents (Group Documents) page.

Setting up permissions-based access

When you post a file or document in the Group Documents folder or any of its subfolders, you can control who has access to it.

By default, all members of your WebOffice have Read and Add access to all folders and documents. That means that they can access all folders and documents and read them, and add more documents to any given folder.

By setting Permissions, you can designate which members of your WebOffice can see any given folder and the files in it, which members can edit those files, and which members have no access.

If your site's administrator allows guests to access your site, guests may see only documents posted in the Public Documents folder and its subfolders. They do not see files posted in the Group Documents folder or any of its subfolders.

Follow these steps to set up permission levels for members to Manage, Read and Add, Read, or have No Access to a given folder and its documents.

- 1. On the New Folder page, click Choose Members to select the members of your WebOffice who are to have access to this particular folder or documents repository.** The Choose Members page appears.
- 2. Highlight the members' names you want to include by holding down the Shift key and dragging your mouse across their names, then click the left-facing arrow.** Doing so puts all the names in the Special Permissions box.
- 3. Click OK.** The New Folder page, shown in Figure 4-2, reappears.
- 4. In the Permissions box, use the drop-down list after each member's name to select the level of access you want that member to have: Manage, Read and Add, Read, or No Access.**
- 5. When you are done, click Save.**

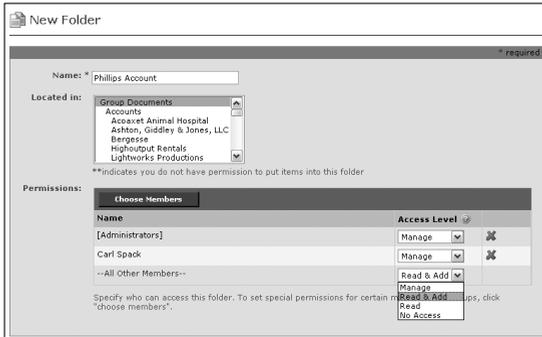


Figure 4-2: The New Folder page.

You're now ready to start adding documents to your centralized documents repository.

Adding documents

You can post and share virtually any type of file in your WebOffice by uploading the file and entering some basic details to help other WebOffice members find the file later. Some examples of the files you can post include

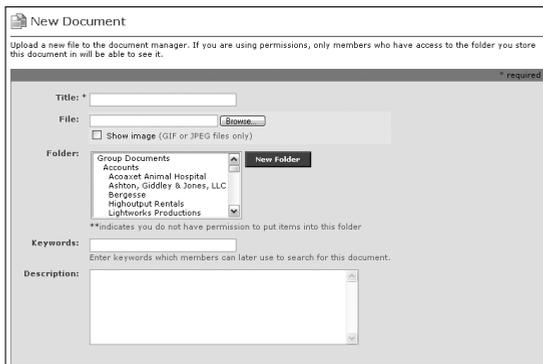
- ✓ Project plans and reports
- ✓ PowerPoint presentations
- ✓ Form letter templates
- ✓ Policy and procedure guides
- ✓ Graphics and photographs
- ✓ Meeting minutes
- ✓ Audio files
- ✓ Video files

To upload any of these file types:

- 1. In the menu on the left of the Home page, click the Documents arrow.** A submenu appears.
- 2. Choose New Document.** The New Document page, shown in Figure 4-3, appears.

3. In the Title input box, type a title for the document or file.
4. Click the Browse button, select the file you want to upload, and then click Open.
5. In the Folder input box, select the folder where you want to file the document. Or, you can add a New Folder and choose your own permissions settings (refer to “Setting up permissions-based access” earlier in this chapter) to control who sees the document filed there.
6. In the Keywords input box, type keywords that you think other WebOffice members might use to search for the document.
7. In the Description input box, type a brief description of the document. You can also write, for example, a revision history for the document or include a link to any Web site.
8. Click Save. A pop-up progress indicator appears as your file uploads; the indicator closes automatically when the upload is complete.

Members who have access to the folder where you added the file can now view the document.



The screenshot shows a web form titled "New Document". At the top, there is a header with a document icon and the text "New Document". Below the header is a small instruction: "Upload a new file to the document manager. If you are using permissions, only members who have access to the folder you store this document in will be able to see it." The form contains several input fields and a dropdown menu:

- Title:** A text input field with an asterisk and "required" next to it.
- File:** A text input field with a "Browse..." button to its right. Below it is a checkbox labeled "Show image (GIF or JPEG files only)".
- Folder:** A dropdown menu showing a list of folders: "Group Documents", "Accounts", "Acquest Animal Hospital", "Ashton, Giddley & Jones, LLC", "Bergasse", "HighOutput Rentals", and "Lightwerks Productions". A "New Folder" button is visible to the right of the dropdown.
- Keywords:** A text input field with a small asterisk. Below it is a note: "**Indicates you do not have permission to put items into this folder." Below the input field is a prompt: "Enter keywords which members can later use to search for this document."
- Description:** A large text area for entering a description.

Figure 4-3: The New Document page.

To find out how to notify members of the new document by sending a link via e-mail, see “Notifying members of new documents” later in this chapter.



You can add to the Document Manager any type of file you want. However, the members of your WebOffice need the correct software to view certain types of files. For example, members will need Microsoft Excel or an Excel viewer installed on their computer to view an Excel spreadsheet that you post to your site.

You can make changes to a document if you initially added the document, if you're a Manager for the folder where the document is filed, or if you are the administrator (see Chapter 8).

If several members typically need to be able to edit a set of files, your WebOffice administrator can create a member group for them so that you can give them all Manage access to a folder.

Updating documents: Check in, check out

You can make changes to files at any time by downloading the file from your WebOffice site, making your changes, and then uploading the new file to your WebOffice.

When you edit a document, you “check out” the file so that no other members can edit it while you're working on it. After you complete your editing, you “check in” the file to make your new version available to others.

To make changes to a file:

- 1. Find the document in your WebOffice by browsing through the Documents list or by searching for it. Then click the title of the document to display the document details.** The document page appears, and includes Edit, Check Out, Move, and Delete buttons.
- 2. Click Check Out.** The Check Out page, shown in Figure 4-4, appears.
- 3. In the Comments box, type a message to indicate to other members that you are in the process of editing the file and to explain why you've checked it out and when you'll be checking it back in.**

4. **Click OK.** The Download file page appears.
Note: When you click OK, you prevent others from attempting to edit the file at the same time.
5. **To download the file to your computer, right-click the filename.** The browser dialog box appears.
6. **Choose Save Target As (Internet Explorer) or Save Link As (Netscape), and then click Save.**
7. **Make your changes to the file and save them to your computer. For example, if you're working with a Word document, save the document in the Word files on your PC in whatever folder is appropriate.**
8. **To check the document back into your Folder in WebOffice, find the document title in your WebOffice Document Manager and then click the title of the document.** The Document details page appears and says that the document is currently checked out.
9. **Click the Check In button at the top of the page.** The Check In page, shown in Figure 4-5, appears.
10. **Click the Browse button to upload the updated file and then click Open.**
11. **In the input boxes provided, type the title of the updated document and keywords to help other members find the file.** You also can write comments in the Description box to inform others of any information relevant to your editing changes.
12. **Click Save.** A pop-up progress indicator box appears as your document is uploading to the WebOffice site; the indicator closes automatically when the upload is complete.

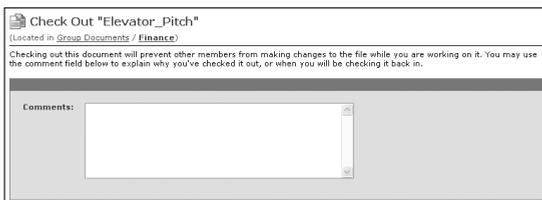


Figure 4-4: The Check Out page lets you edit a document and inform other members of your WebOffice that you are doing so.

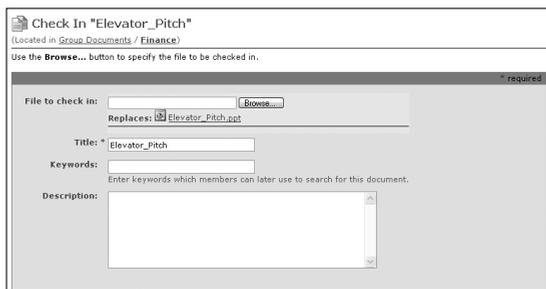


Figure 4-5: The Check In page lets you post an edited document or file back on your WebOffice and inform other members that you have done so.

Renaming a file

You can easily change the filename for a document from inside your WebOffice site. Here's how.

1. **Find the document in your WebOffice by browsing through the Documents list or by searching for it. Then click the title of the document.** The Document Details page appears.
2. **Click the Pencil icon beside the filename.** The Rename File Attachment page appears.
3. **Type the name you want in the New File Name text box.** Filenames within each folder must be unique.
Note: This operation cannot be undone.
4. **Click OK.**



Notifying members of new documents

When you add a new document to a folder, the title of the document appears in the What's New section of your WebOffice Home page by default. However, you can change the default setting so that the document title does not appear on your Home page.

You can also send members an e-mail notification about your new document or a document update. The e-mail message contains a link that goes directly to the document.

Here's how to send a link to a document:

- 1. Find the document in your WebOffice by browsing through the Documents list or by searching for it. Then click the title of the document to display the document details page.**
- 2. Click Send Link in the top menu bar.** The Send Link page appears.
- 3. Fill in the information on the Send Link page.**
- 4. From the names in the Addressee box, select the names of the people you want to send the link to, and then click the To, Cc, or Bcc buttons to add the names to the appropriate groups.** The Subject line fills in automatically with the document title, but you can change the Subject line, if you'd like. A link is automatically inserted in the message area for members to use for accessing the document.
- 5. Type your personal message above or below the link in the text box and then click Send.** E-mail notification of the new document will be sent to all the members you have specified.

Discovering Web Folders

The Web Folders feature of the Document Manager allows you to use the familiar Windows environment to manage all the files and folders in your WebOffice. You don't even need to go to your Web browser or to your WebOffice to see and/or make changes to the documents posted there.

With Web Folders, you can

- ✓ Drag and drop files from your computer to your WebOffice site in Windows Explorer.
- ✓ Post multiple files at once to your WebOffice.
- ✓ Open files in WebOffice for editing directly from Microsoft Word (or any other Microsoft Office 2000 or XP application).
- ✓ Back up your entire Document Manager to your computer or to a CD.

To begin using Web Folders, follow this one-time setup process.

1. **Verify that you have Web Folders (or “WebDAV” for Macintosh) on your system.** If necessary, run the short installation program.



In Windows 2000 or XP, Web Folders is called My Network Places and comes set up on the system.

In Windows ME, Web Folders is called My Network Places. Windows ME typically comes with Web Folders already installed. On your computer desktop, you see the My Network Places icon.

If you do not see the My Network Places icon on your desktop, please download and re-install Internet Explorer 6 (or above) from the Microsoft Web site.

2. **Create a Web Folder for your WebOffice.** Using Windows Explorer, create a Web Folder through which you can access files on your WebOffice.



Windows users and Macintosh users can find step-by-step instructions on the Web Folder and WebDAV setup process in the online Help about Web Folders in WebOffice.

After the Web Folders integrate with your Document Manager, you can edit a document or any file without even going to your WebOffice site. For example, to edit a Microsoft Excel file in your WebOffice using Web Folders, follow these steps.

1. **Open the Microsoft Excel file you want to edit directly from its Web Folder location.** The file is automatically “checked out” from your site. While you’re working in the file, other members can view it, but they can’t make any changes. (Refer to the section “Updating documents: Check in, check out” earlier in this chapter.)
2. **Make your edits and then save your changes in Microsoft Excel.**

Your edits are automatically updated on your WebOffice site. You can use the same process for any other Microsoft Office 2000 or above application — such as PowerPoint.

Searching for Documents

If you're looking for a specific document, you can search for it by using any of the document properties, including the title, keyword(s), filename, and author. You can even do a Full-Text Search on all the contents of your uploaded files. You can begin your search from the Search drop-down feature in the upper-right side of your WebOffice Home page, from the Documents page, or from the Advanced Search page.

Performing a simple search

You can begin a simple search from one of two places in your WebOffice, as follows.

- ✓ **In the Search box, shown in Figure 4-6, in the upper-right side of every page in your WebOffice, select Documents from the drop-down list. Enter a search term in the input box next to the Go button and click Go.** The Search Results page appears.
- ✓ **In the Search box at the top of any Documents list page, enter any word or combination of words and then click Go.** The Search Results page appears.



Figure 4-6: Search box allows you to perform a simple search.

Performing an Advanced Search

If you have a large number of documents stored in your Document Manager and you know just what you're looking for, perform an Advanced Search — by filename, date created, or author, for example. To perform an Advanced Search, follow these steps.

1. **In the menu at the left of your WebOffice Home page, click Documents.** The Document (Group Documents) page appears.

2. **Click the Advanced Search link, beside the Search box.** The Advanced Search page appears.
3. **On the Advanced Search page, enter as much or as little of the following search criteria as is applicable:**
 - Author
 - Date
 - File size
 - Filename
4. **After setting your search criteria, click Search.** The Search Results page appears with a list of documents meeting your search criteria.
5. **If you'd like to further narrow your search, click the Refine Search link at the top of the Search Results page.**

Doing a Full-Text Search

The premium Full-Text Search feature allows you to perform the most complete search of documents in your WebOffice. This powerful feature is available only after your administrator subscribes to and enables full-text searching for your site.

With this feature, you can search on the text that's contained in each one of your uploaded files.

When you enable Full-Text Search, you see on the Advanced Search page, a Search Contents of File Attachments checkbox. When you click to select this checkbox, all searches you perform automatically search the text in file attachments uploaded to your Document Manager.

Full-Text Search searches the following file types: Microsoft Word, Microsoft Excel, Microsoft PowerPoint, PDF, HTML and Plain Text documents.



To find out about Full-Text Search, click the Find Out How link in the Ad box on the Advanced Search page of your WebOffice. You must purchase the Full-Text Search feature, which is not standard to the WebOffice Advanced Search feature.

Chapter 5

Creating Web Databases

In This Chapter

- ▶ Getting an overview
 - ▶ Taking a look at customized databases
 - ▶ Working with permissions-based access
 - ▶ Discovering activity logs
 - ▶ Using calculated fields
-

With just a few keystrokes, you can quickly build customized databases for rapid search and retrieval of information critical to your company, department, or project team. WebOffice users have created thousands of custom databases following the easy steps discussed here.

In this chapter, we tell you how to build customized databases from scratch, specify your own unique settings, field names, views, and so on. We also show you how to use advanced features, such as calculated fields. And, we give you examples of databases created in a wide range of businesses and industries.

Sharing Information

With WebOffice Database Manager, you can sort and group data by a number of fields, such as date, creator, and region. You can create multiple and special views to show only data that meet certain criteria. And, after you set up your databases, you can share information with anyone, anywhere that you choose.

You can import or export data to or from other database applications. See “Importing and Exporting Data” later in this chapter for more on this subject.

Working with Customized Databases

With WebOffice, you can customize your database to suit your needs, no matter what business, industry sector, or part of an organization you work in. The industry applications list is virtually unlimited. Whether you're in sales, marketing, human resources, research and development, or any other part of an organization, you can create a custom database to serve your purpose.

When you create your WebOffice customized database, you can

- ✔ **Establish database settings.** You specify the database name, description, and options for viewing the database.
- ✔ **Create and modify fields.** You establish the name and description of the field; the type of field (Address, Checkbox, Text, or List, for example); whether the field is required, and whether users can search for information in this field.
- ✔ **Create and use calculated fields.** You create and use fields whose numeric value is derived by a formula that operates on two or more other numeric fields.
- ✔ **Create and modify views.** You set the View properties, (such as name, default view, columns, sorting and groupings, filtering, totaling and subtotaling) as suits your needs for this particular database.
- ✔ **Set permissions for access.** You grant database permission, from no access, to read only, read and add, edit, and manage, as appropriate for each user of the database.
- ✔ **Create reports.** You specify pagination, grid lines, report formats, and color. You can modify report permissions to meet your particular business needs.

- ✔ **Create and modify activity types and logs.** You designate the types of activities most relevant to your database, such as phone call, e-mail, sales visit, and so on.



You can find the customization options for a database on its Manage Database page. Anyone with Manage Database access can customize a database. The Manage Database page also includes administration functions that let you — and anyone you designate to be a database manager — clear all the data from the database, import data into a database, export data from a database, and delete the database.

Here's a small sampling of how various types of organizations use the database in a wide variety of applications:

- ✔ **Consultants:** Create customer profile databases; nonconformance databases for clients, customer satisfaction databases, and supplier qualification databases and so on.
- ✔ **Financial institutions:** Use new business development databases; competitors' databases; training and event registration databases; and employee communications databases.
- ✔ **Real estate firms:** Manage closing times and locations.
- ✔ **Recruiting firms:** Manage thousands of records with client profiles, assessments, resumés, and daily activity logs.
- ✔ **Marketing and Public Relations agencies:** Manage press contacts, follow media opportunities, and track events and tradeshows.
- ✔ **Sales and marketing departments:** Use the database for customer relationship management.
- ✔ **Healthcare organizations:** Track intake of patients/clients. Track volunteers, alumni, mentors, donors.
- ✔ **Nonprofit organizations:** Track membership and improve dues collection.



The sky's the limit, really!



For more information about how companies worldwide use the Database Manager, visit www.weboffice.com.

Building Your Custom Databases from Scratch

The beauty of being able to build your own customized database from the ground up is that what you build will serve your needs exactly, and — as your needs change — you can modify the database or quickly create a new one to meet your new circumstances. Plus, you can do all of this in just a matter of minutes.

The following steps show you how to build a custom database from scratch.

1. **In the menu at the left of your Home page, click Databases.** The Databases screen appears.
2. **Click the New button.** The New Database screen appears.
3. **Select the Design My Own option.** Another New Database screen appears.
4. **Type the required information about your database into the input boxes and then click Save.** The Modify Fields screen appears.
5. **Click the New button.** The New Field screen appears.
6. **Specify the properties for this field using the input boxes and check boxes, then click Save and Add Another.** Another New Field screen appears so you can create your next field.
7. **Continue until you are done creating all the fields for your database, and then click Save.**
8. **Optional: On the Modify Fields page, click Order Fields if you want to change the order of your fields.** The Order Fields page appears.
9. **Select the field whose order you want to change and click the up or down arrow to change its position.**
10. **Click Save.**

Using Existing Database Templates

You may be thinking, why build from scratch when you can get a head start by using an existing template as is, or by modifying one to meet your needs? Well, you can do either if you'd like with the following database templates:

- ✔ **Asset Manager:** Use this template to maintain a detailed inventory of anything — from computer hardware to merchandise to corporate assets, and so on. You see a ready-made field in which you can upload a picture of each item in the Asset Manager. You can also customize the fields and views based on what items you're cataloging.
- ✔ **Customer Relationship Manager (CRM):** Use the template as is, or create a customized database for sharing contact information. You can track and maintain real-time records of customer interactions, such as meetings and phone calls; create to-do lists for each customer; set reminders for important follow-up tasks; and send e-mails to some or all of the people in your contact list.
- ✔ **Event Registration:** Use the template as is, or set up a customized database to track registration information for meetings, seminars, conferences, trade shows, classes, sporting events, club functions, and any corporate or community event. This template includes two related databases: One for keeping track of event details such as time, location, and description, and one for tracking the attendees of each event.
- ✔ **In/Out Board:** Use this template as is to keep track of personnel whereabouts, or customize it to better suit your needs. You can instantly view coworkers' status to see whether they are in or out, at lunch, in a meeting, on vacation, or home sick. Click an employee name to look up contact information for that employee.
- ✔ **Issue Tracker:** Use the template as is to provide a ready-made database where you can log problems and inquiries and assign trouble tickets for members to track. Or, use this template as a starting point and customize it based on practices your company uses to prioritize and follow up on inquiries.

- ✔ **Knowledge Base:** Use the template as is to create, maintain, and share company knowledge, either internally or externally. Customized applications for this database include an IT Help Desk, a Customer FAQ List, a Self-Service Training Center, and a 24/7 online Technical Support line, to name just a few.
- ✔ **Sales Forecasting:** Use this template to create a database that gives you instant snapshots of your sales pipeline. You can review the status of each sales opportunity; keep historical data of sales activity in the Activity Log; print forecast information; or export sales data to a spreadsheet for additional analysis. All fields and views are customizable, so you can tailor the database to match your company's forecasting process.
- ✔ **Time Sheet:** Use the template to create a custom database where you can track billable and nonbillable time spent on customers, projects, and activities.

Follow these steps to select and activate any of the preceding database templates.

1. **In the menu at the left of your Home page, click Databases.** The Database screen appears.
2. **Click the New button.** The New Database screen appears.
3. **Select the type of database template you want to use.** The New Database page appears with the name of the database template in the database name input box. You may keep the name of the template as the name of your new database, or you may write a new name for this templated database in the Name box.
4. **Optional: If you want to use any of these database templates as is, simply click Save.** A templated database will be created and listed in your list of databases. You now can skip ahead to the “Entering data” section later in this chapter, because you're ready to enter data in your database.
5. **If you want to customize the database templates to suit your particular needs, see the steps in the following section.**

Customizing existing templates

You can easily modify the fields in any of the templates previously described to create custom-tuned databases to meet your particular needs. Here's how.

- 1. From your list of database templates, select the database template you want to modify by clicking on it.** This brings you to the New Database (Chosen Template) screen.
- 2. Fill in the boxes and click Save.** The Modify Fields screen, as shown in Figure 5-1, appears. In this screen, you can add, delete, or modify existing fields.
- 3. To change the properties of any field, click the Edit icon and fill in the changes you want in the check boxes and input boxes.**
- 4. Click Save.** The Modify Fields Screen appears with the newly edited field listed along with all the other fields.
- 5. Continue to edit fields in this way. When you have made all the changes you want and are back to the Modify Fields page, click Done.**

Now you can start populating your database.

Entering data

After you customize your template, you're ready to enter data into your database. Follow these steps to do so.

- 1. On the Databases page, select the database you want to add items to.** The Name of Your Database screen appears.
- 2. Click New.** The New Item screen appears.
- 3. Fill in the information in the input boxes and then click Save and Add Another.**
- 4. Continue until all your data is entered and then click Save.**

Modify Fields (Sales Forecasting)						
Display Name	Type	Searchable	Required	Edit	Delete	
1. Company	Text	✓	✓	✎	✕	
2. Contact Name	Name	✓		✎	✕	
3. Phone	Phone Number	✓		✎	✕	
4. Email	Email Address			✎	✕	
5. Sales Rep	List	✓	✓	✎	✕	
6. Territory	List	✓		✎	✕	
7. Industry	List	✓		✎	✕	
8. Stage of Sale	List	✓	✓	✎	✕	
9. Product	List			✎	✕	
10. Description of Sale	Text Multi-Line	✓		✎	✕	
11. Size of Opportunity	Currency		✓	✎	✕	
12. Start Date	Date			✎	✕	
13. Expected Close Date	Date			✎	✕	
14. Close %	Number	✓	✓	✎	✕	
15. Revenue Forecast	Calculated				✕	
16. Actual Close Date	Date			✎	✕	
17. Source	List	✓		✎	✕	
18. Reason for Lost Sale	List	✓		✎	✕	
19. Expected Close Month	Calculated	✓			✕	
20. Actual Close Month	Calculated	✓			✕	
21. Expected Close Quarter	Calculated	✓			✕	

Figure 5-1: The Modify Fields page.

Importing and Exporting Data

You can import data that you get from other applications into your WebOffice database and export data from your database into other applications. *Importing* copies existing data from a text file to your database; *exporting* copies information from your database to a text file.

Importing existing data saves you the trouble of typing it by hand. You may need to import data only once, right before people start to use the database. For example, if you create a Customer Relationship Management (CRM) database, you may want to import existing customer information into your database. You also may need to import data regularly from a weekly sales report, for example.

Exporting data allows you to use information from your database in another application outside your WebOffice. For example, you may want to export data so that you can open it in Microsoft Excel for charting or further analysis. Exporting is also an easy way to create a local backup of the data in your database.

You can also use Microsoft Outlook's Mail Merge tool to export contact information from your database to a Microsoft Excel spreadsheet and then transfer the information easily to

envelopes, labels, and e-mail forms. You choose which fields to include.

Importing data

Before you import information into your database, you want to step back and examine both the text file you're importing and the database you're importing the information into. You may be tempted to ignore the planning phase and start importing right away, but remember that taking a little time to plan your import now will probably save you a lot of time resolving import errors later on.

Here are some things to think about before you import data from a text file into your database:

- ✔ The file must be a *CSV* or *tab-delimited* text file, and you must know which format the file is in, because you specify the format during the import process.

Note: In *CSV* (Comma Separated Value) format, commas separate the field values. The names of *CSV* files usually end with the extension *.csv*. Many software applications, such as Microsoft Excel, open and save *.csv* files.

In *tab-delimited* format, tabs separate the field values. The names of *tab-delimited* files usually end with the extension *.txt*. Many software applications, like Excel and Word, open and save *tab-delimited* files.

- ✔ The database fields must already be created in your WebOffice database. Importing simply copies data from the text file into fields in your database; it does not create any database fields for you.
- ✔ If your database has required fields, the text file must contain values for each of the fields.
- ✔ Importing is easier when the fields in the text file are in the same order as the fields in the database; that way, you have fewer fields to map.

Mapping data

The most important thing to think about prior to importing data is *field mapping*, which is the process by which a column of data in the text file is associated, or *mapped*, to a field in

your database. Mapping fields while importing data can be tricky, depending on the formatting in your data source.

To import a text file and map the fields properly, follow these steps.



1. **Open the database you want to import data into.**
2. **On any database View page, click the Import button at the top of the page.** The Import page appears.
3. **Click the Browse button and select the file that you want to import from.** If the first row of the file contains field names instead of data, click to put a checkmark in the First Row Contains Field Names option.
4. **Select the format, as shown in Figure 5-2, of the .csv or .txt file you are importing and then click Next.**

Figure 5-2: Choose which file format you want to import.

5. **Look at the preview, as shown in Figure 5-3, which shows how the data will be imported. If data is not being mapped to the correct field, use the drop-down lists to correct the mappings.**



For even greater detail, go to the online Help in your WebOffice, or contact Customer Service, via e-mail or phone.

	Company	Contact Name	Phone	Stage of Sale
	Company	Contact Name - First Name	Phone	Stage of Sale
1	Acme Printing	Joe	(555) 867-5309	2 Qualified
2	Connors Construction	Brendan	(555) 990-1207	2 Qualified
3	VS Pharmacy	Wendy		1 Prospect

Figure 5-3: The Preview Data for Correct Mapping page.

Exporting data

You can export the data in any view to text files by clicking the Export button at the top of the view. The view determines which data is exported and how that data is displayed. If the data looks right in the view, it will look right in the exported text file.



The export operation produces a text file of the exported data. To save this file, your Web browser downloads the file to your computer and asks whether you want to open the file or save it. If you choose to save it, the browser also asks where to save the file on your computer.

To export a view to a text file, follow these steps:

- 1. Select the database you want to export data from.**

The (Database Name) page appears.

- 2. In the View By drop-down list, select the view you want to export from.** Remember, only the data displayed in the view will be exported.

- 3. Click the Export button.** The Export page appears.



- 4. On the Export page, verify that this is the view you want to export.**

- 5. Specify the format of the exported file, either comma delimited (.csv) or tab delimited (.txt) and then click Export.** The File Download dialog box appears.

- 6. Choose whether to open the file or save it.** In most cases, you will want to save the file.

- 7. If you choose to save the file, in the Save As dialog box, specify the name of the file and where on your computer you want to save it. Then, click Save.** The Web browser downloads the exported text file to your computer. A progress window is displayed during the file download. The export operation is complete when the progress window disappears. The file is saved in the location you specified.

- 8. Click Done to close the Export page.**



Exporting data is a handy way to back up your data.

Setting up Permissions-based Access

As the manager or administrator of the your database, you can determine which databases each user can see, edit, manage, and so on. You can limit some users to “view only” and extend broader privileges to others by allowing them to add, modify, and delete information. Here’s how.



1. From your list of Databases, click the **Permissions** icon next to the Database you want to give members access to. This brings you to the Permissions screen for your designated database, as shown in Figure 5-4.

Permissions (Sales Forecasting)

Control database permissions by setting the access level for members and groups. Use the **Choose Members** button to select members and groups who need special or non-default access to this database. All other web office members have the access level specified for “--All Other Members--”

Name	Access Level
Christine	Manage
Darrin	Read
Derek	Read & Add (own records only)
Joey	Manage
--All Other Members--	No Access

People with **Read & Add** access can edit and delete in the database, regardless of who entered them

with **Edit** access can edit or delete any items

Figure 5-4: The Permissions screen allows you to set the level of access to the database.

2. **Click Choose Members.** The Choose Members screen appears and displays a list of all the members of your WebOffice.
3. **In the Members box, highlight the name of every member you want to have permission to access your database and click the arrow to move the name to the Special Permissions box.**
4. **Click OK.** The Permissions screen appears.
5. **In the drop-down list, click the arrow after each selected member’s name and then click to highlight the level of permission for that user.**
6. **When you are done indicating the level of permission given for all users listed, click Save.**

Using Activity Logs

Activity Logs are used to record interactions with other people or companies. For example, in an issue-tracking database, the Activity Log can log interactions with the customer reporting the issue as well as with the engineering group trying to resolve it.



Within Activity Logs, you specify *activity types* that make sense for the type of database you're working in. For example, an issue-tracking database may have activity types such as Phone Call, E-Mail, Logged Trouble Ticket, and Escalated. On the other hand, a contact database may have activity types such as Lunch Meeting, Phone Call, Left Message, and so on. When you add an Activity Log to a database, the log has a default list of activity types. You can modify the default activity types to work well within the database.

Setting up an Activity Log, as shown in Figure 5-5, is easy to do with the WebOffice Activity Log template. Here's how.

1. **On the Home page in the left menu, click Databases.** The list of your databases appears.
2. **Click the Manage icon next to the name of the Database you're creating the Activity Log for.** The Manage Database screen appears.
3. **Click the General Settings Link.** The General Settings page appears.



Activity Log for Amy Anderson

The Activity Log keeps track of interactions that you want to associate with a database record. To add a follow-up task to the activity you just entered, click the **Tasks** tab or **Save & Add Task**. When you have finished updating your log, click **Done**.

Activity Log Tasks *required

LOG AN ACTIVITY

Activity: Pick One October 14, 2005 Time: EDT

Activity Notes: *

Save Log Entry Save & Add Task

VIEW ACTIVITY LOG

Delete				
Activity	Date	Activity Notes	Logged	
<input type="checkbox"/>	Demo	Friday, October 14, 2005 5:45 AM	Gave Web Demo of new products	Logged on Friday, October 14, 2005 1:20 PM EDT by Christine Bataille
<input type="checkbox"/>	Phone Call	Wednesday, October 05, 2005 1:45 PM	Called Amy regarding her commitment to doing a demo later this week.	Logged on Friday, October 14, 2005 1:20 PM EDT by Christine Bataille
<input type="checkbox"/>	Email	Tuesday, October 04, 2005 11:00 AM	Received email lead from Amy, sent welcome package	Logged on Friday, October 14, 2005 1:21 PM EDT by Christine Bataille

Figure 5-5: The Activity Log page for an individual contact.

4. Check the **Include An Activity Log box**, and check any other boxes you want on the page, such as the **Show in Search Drop-down box** and the **Include Tasks box**.
5. **Click Save.** A link for the Activities List will be added to the Manage Database page.
6. **Click the Activities List link.** The Edit Activity Type screen appears.
7. **Use the following buttons and icons to modify the existing list or to add new types of activities.**



Add: To add a new activity type, enter a name for the type of activity in the Add to List input box and then click the Add to List button.



Edit: Click the Rename icon beside the activity type you want to rename (see Figure 5-6). Enter the new name in the Activity Type input box and then click Save.



Delete: Click the Delete icon beside the type of activity you want to delete. A pop-up window appears, verifying that you want to delete the item.



Edit Activity Type

Customize the list. To create a new list item, enter a name and click **Add to List**.

Add to List

Name	Rename	Delete
Demo		
Dinner		
Email		
Fax		
Lunch		
Meeting		
Other		
Phone Call		

Figure 5-6: Renaming changes the Activity Type.

8. **Click OK to confirm.**
9. **Continue making additions, editing, and deleting and then click Done when you have finished all your edits.**

To view the Activity Log and to enter individual events or activities to it, follow these steps.



1. **Go to the main page for your database and click the View Item icon for any record in your database.** The individual record page appears.
2. **Click the Goto button at the top of the page, and select Activity Log from the submenu.** The Activity Log for that individual record appears.
3. **In the Activity Log, use the Activity drop-down menu, the Date and Time drop-down menus, and the Activity Notes input box to describe an activity with the person of record.** For example, if you have a Customer Relationship Management database, you describe in each customer's Activity Log how and when you last contacted that customer.
4. **Click Save Log Entry.** Your new log entry appears in the View Activity Log section of the Activity Log page. (Refer to Figure 5-5 to see both the Log An Activity section and the View Activity Log section of the Activity Log page.)

Creating and Using Calculated Fields

Calculated fields are fields in a database whose numerical value is derived by a formula that operates on two or more other numerical fields. Calculated fields are very useful for a wide range of business purposes. You can use calculated fields in a database to do the following:

- ✓ Compute billing and payroll
- ✓ Produce an invoice
- ✓ Forecast sales and revenue streams
- ✓ Perform currency exchanges
- ✓ Compute the value of inventory
- ✓ Determine when a warranty expires or a lease is up, and so on



A *calculated field* is a special type of field. The value of the field is not stored within the database record, but is instead calculated or computed based on the values of other fields within that record.

The calculation is called a *formula* and can consist of values from other fields, constants, operators (add, subtract, multiply, and divide), and function results. For example, say that you have a database for sales forecasting and you want to calculate the Potential Value of a sales opportunity, based on the percentage chance of the sale being closed. The Size of Opportunity (sales) and the Close % (the percentage, or likelihood, of that sale being closed) would be two of the fields used in a formula to calculate a third field: the Potential Value in dollars of that sale in the sales pipeline.



Be sure to keep the following points in mind.

- ✔ A WebOffice **database** may contain up to five calculated fields.
- ✔ A **formula** may contain up to 2,048 characters and may contain up to 50 elements.
- ✔ An **element** is defined as an operator, a field, or a constant.

To add a calculated field to your database, follow these steps:

1. **From the menu on the left of your WebOffice Home page, choose Databases.** The Database List page appears.
2. **Click the Manage icon of the database you want to work with.** The Manage Database page appears.
3. **Click Fields.** The Modify Fields page appears.
4. **Click New.** The New Field page appears.
5. **Enter the name of your field.** For example, Potential Value.
6. **From the Type drop-down list, select Calculated.** The New Field page appears with a General Properties section already filled in with the name and type of the database and a Calculated Properties section with input boxes ready for you to fill in.

7. In the Formula input box, enter the Formula that describes what fields you want to use to generate the results in your calculated field.

a. To enter your formula, click the Fields button next to the Formula input box. A drop-down list of available fields appears.

b. Click the fields you need to use in the formula to transfer them into the Formula input box.

For example, in the Available Fields drop-down list, you may have a Size of Opportunity field and a Close % field that you need to use in your formula. Select these two fields, by clicking on them. They automatically appear in the Formula input box in the order in which you click them. Next, type an * asterisk (which functions as a multiply sign) between them (see Figure 5-7).

Note: When creating formulas for calculated fields, you can use the four basic arithmetic operators: addition (+), subtraction (-), multiplication (*), and division (/). You can apply these operators to number or currency fields and numeric constants.

8. From the drop-down list, select the format (currency, date, or number) to display the result of your calculated field.

The screenshot shows a dialog box titled "New Field (Sales Forecasting)" with the instruction "Specify the properties for this field." The dialog is divided into two main sections: "GENERAL PROPERTIES" and "CALCULATED PROPERTIES".

GENERAL PROPERTIES:

- Field Name: Potential Value
- Type: Calculated
- Searchable: Allow searching on this field

CALCULATED PROPERTIES:

- Formula: [Size of Opportunity]*[Close %]
- Display As: Currency
- Currency Type: USD - U.S. Dollar
- Decimal Places: 0
- Thousand Separator:
- Decimal Separator:

An "Available Fields" list is open, showing a scrollable list of fields including: [Company], [Contact Name First Name], [Contact Name Middle Name], [Contact Name Last Name], [Phone], [Email], [Sales Team], [Territory], [Industry], [Stage of Sale], [Product], [Description of Sale], [Size of Opportunity], [Start Date], [Expected Close Date], [Close %], [Actual Close Date], [Source], and [Reason for Lost Sale].

Figure 5-7: Creating formulas is easy to do using the Formula input box and the Fields drop-down list.

9. **Select the type of currency (U.S. dollar, euro, and so on) from the drop-down list and then make any other selections (decimal places, thousand separator, and decimal separator).**
10. **When you have finished specifying all the characteristics of the calculated field, click Save.** The Modify Fields screen appears. You can see that the new calculated field, Potential Value, has been added to the list of fields. Now, when you use your database, the number in the Potential Value field is automatically calculated by multiplying the number in the Size of Opportunity field by the number in the Close % field.

You can select fields to use in your formula from the Fields drop-down list, or you can create new fields to be used in your calculation. For more information on how to create formulas for your calculated fields, check out the online Help section.

Editing calculated fields

When you edit a calculated field, what you get back may be a formula that's been slightly modified by the system. You may discover additional parentheses or a new name in the formula, if a field name used in a calculation has changed.

Using calculated fields

After you successfully create a calculated field, the field becomes available for use in other parts of the database application. Calculated fields can be

- ✔ Added to a View's column list
- ✔ Used in sorting or grouping
- ✔ Used to create a filter
- ✔ Used in totaling and subtotaling (for a calculated field that results in currency or numeric value)
- ✔ Searched and used to create Advanced Search criteria (if the fields have been marked searchable in advance)

Chapter 6

Real-Time Collaboration with WebEx Meetings

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In This Chapter

- ▶ Getting an overview
 - ▶ Scheduling WebEx Meetings
 - ▶ Leveraging your WebEx Meetings
-

WebEx Meetings, a WebOffice premium service, allow you to do just about everything that you can do in a face-to-face meeting, except perhaps shake hands. WebEx Meetings provide a full range of options for an interactive meeting experience. You can share your entire desktop and applications running on it, in real time, with anyone, anywhere.

You can meet with customers, business partners, sales prospects, remote employees, vendors and so on. Virtually anyone.

In this chapter, we show you how to launch and use WebEx Meetings. We show you how to start a meeting on the spur of the moment, schedule a meeting in advance, schedule a teleconference, and join a meeting that someone else is hosting. And, we show you how companies are using WebEx Meetings to gain real business value.

If you aren't a subscriber to WebEx Meetings, feel free to read this chapter and see what you are missing.

So Tell Me, What Exactly Is a WebEx Meeting?

A WebEx Meeting is easy to define. It's a meeting that you set up and conduct on the Web, often with (sometimes without) a concurrent teleconference. As the WebEx Meeting host, you can invite participants anywhere, anytime, to the meeting via e-mail and receive confirmation on their acceptance of your invitation the same way.

Your WebEx Meeting might consist of a business presentation, a sales presentation, a lecture, a workshop, a training session, or just about any other type of business meeting you can think of. A key signature of a WebEx Meeting is its interactive nature, meaning the ability to give, receive, and discuss information online in real time.



Throughout this chapter, when we say WebEx Meetings, we mean WebEx Meetings *with a teleconference*.

Appreciating the Business Value of WebEx Meetings

Companies save large amounts of money by using WebEx Meetings rather than spending money on travel. Here's how.

- ✔ Trainers can instruct trainees who are located across states, countries, continents, or around the globe. They can train sales representatives, consultants, and partners worldwide — all without buying plane tickets, or even a gallon of gas for their cars.
- ✔ Recruiters can meet with prospects anywhere, anytime.
- ✔ Sales representatives can make presentations and demo products from their own desktops to prospects in remote locations.
- ✔ Key players in product design and development on cross-disciplinary teams in remote locations can stay at their own computers and, in real time, share blueprints, CAD/CAM imagery, and so on.

- ✔ Customer service representatives, field service representatives, and software engineers can remain at headquarters or regional offices and provide support services to clients, rather than visiting them on-site.
- ✔ Educators/instructors can conduct Webinars, courses, and virtually any type of online instruction.
- ✔ Marketing professionals can review advertising copy, graphics, and layouts in real time.
- ✔ Human Resources professionals can interview and coach job seekers anywhere.
- ✔ Buyers can meet with remote vendors and suppliers in real time, anytime.
- ✔ Diagnosticians can share photos, x-rays, CT scans, MRIs and other images in real time, anytime.

You can use WebEx Meetings for just about any type of real-time communication that you can imagine, and you can gain real business value by saving big time on travel expenses.

Launching a WebEx Meeting

You can launch WebEx Meetings a few different ways within WebOffice.

- ✔ From your WebOffice Home page, you can select WebEx Meetings in the menu on the left. The WebEx Meetings page appears. Click the New button to schedule a meeting or the Meet Now button to begin a meeting right away.
- ✔ You can launch WebEx Meetings from inside your WebOffice on the Calendar's New Event page.
- ✔ You can start a WebEx Meeting that you've previously scheduled from the Start link in the Calendar Window on your Home page.
- ✔ From your WebOffice Home page, you can click the WebEx Meetings arrow in the menu on the left. A drop-down menu appears, as shown in Figure 6-1, offering you a choice of Meet Now (starting your own meeting right away), Schedule a Meeting (scheduling a meeting in advance), or Schedule a Call (scheduling a teleconference).

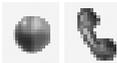


Figure 6-1: The drop-down menu for launching WebEx Meetings.

We show you how to do these things in the following sections.

Viewing your WebEx Meetings

In WebOffice, you can quickly view a listing of your WebEx Meetings. You can see



- ✓ Beside each listed meeting, an icon: The Ball icon tells you the meeting is a WebEx Meeting, which may or may not include teleconferencing; the Telephone icon tells you the meeting is teleconference only.
- ✓ Upcoming meetings on the Calendar window on your WebOffice Home page. You can set the Home page Calendar defaults to show you just today's meetings, your meetings for several days, or for the next 30 days.
- ✓ Listings of both your upcoming and your past WebEx Meetings on your WebEx Meetings page. To do so, simply click WebEx Meetings in the menu at the left of your WebOffice Home page. The WebEx Meetings page (shown in Figure 6-2) appears, showing you the Time, Topic, Type (Web Meeting or Conference Call), and Status of each of your WebEx Meetings. From the drop-down menu, you can choose to view your past meetings, today's meetings, this week's or month's meetings, or all your upcoming meetings.

Note: The menu bars at the top and bottom of the WebEx Meetings page allow you to schedule a WebEx Meeting for the future, or start a meeting right away. We talk about how to do each of these functions in just a minute.

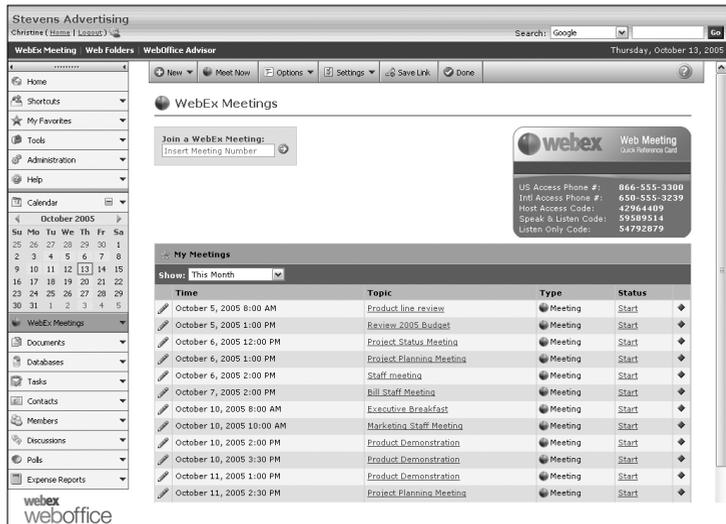


Figure 6-2: WebEx Meetings page shows you upcoming meetings.

Meeting spontaneously

You can conduct meetings on the spur of the moment with the Meet Now feature. As long as the meeting participants are either members of your WebOffice or individuals outside your organization whose e-mail addresses you have. Here's how to launch a meeting spontaneously.

1. Click **WebEx Meetings** in the menu at the left of any **WebOffice** page. The WebEx Meetings page appears.
2. Choose **Meet Now** from the menu bar at the top of the page. The Meet Now page, as shown in Figure 6-3, appears.

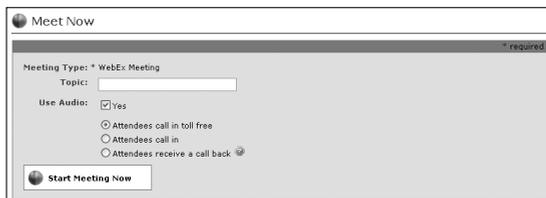


Figure 6-3: The Meet Now page.

3. In the Topic input box, type the topic for your meeting.
4. Place a checkmark in the Use Audio Box if you want to include teleconferencing with your WebEx Meeting. You can choose from three options: Attendees Call In Toll Free, Attendees Call In (using a regular telephone number), or Attendees Receive a Call Back.
5. This time, choose Attendees Call In Toll Free. Feel free to try out the other calling options in your next WebEx Meeting. The onscreen prompts are easy to follow.
6. Click the Start Meeting Now button. A pop-up box tells you that WebEx Meeting software is being automatically installed on your PC. The installation takes approximately one minute. The One Moment Please screen appears briefly and disappears. The Meeting in Progress screen appears briefly and disappears. You do not need to do anything. Next, the WebEx Meeting Manager page, shown in Figure 6-4, appears. **Note:** If you subscribe to WebEx audio services, a pop-up box appears with a toll-free number for you to call and a Meeting Number and Attendee ID Number.

Start Meeting Now

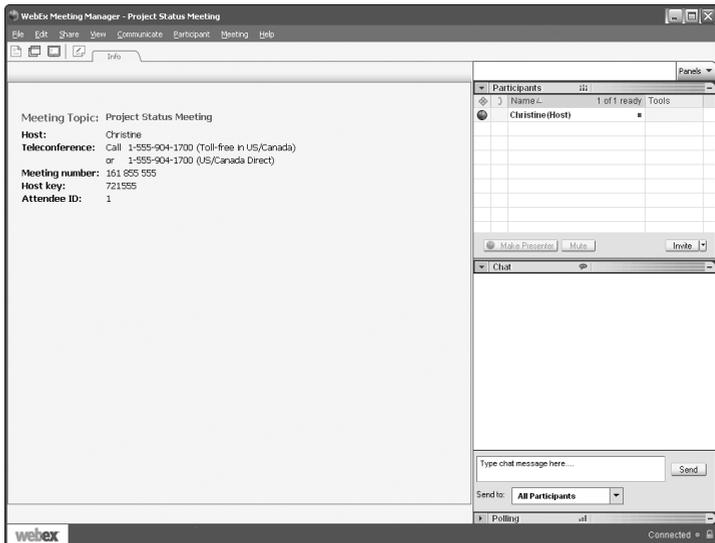


Figure 6-4: WebEx Meeting Manager page.

7. **Click OK.** The pop-up box disappears. The phone number, Meeting and Attendee ID number are visible on the Meeting Manager page.
8. **Dial the toll-free number and respond to the audio prompts to enter the Meeting and Attendee ID numbers.**
9. **From the top menu bar on the WebEx Meeting Manager page, select Participant.** The Participant drop-down menu appears.
10. **Choose Invite, and then from the Invite drop-down menu (which opens sideways), choose By Email.** The Invite Attendees pop-up box appears.
11. **Type each invitee's e-mail address in the Attendee Email Addresses text box, separating the addresses with commas.**
12. **Click the Send Invitation button.** The Meeting Manager page reappears. Meanwhile, e-mail invitations are sent to everyone you designated.

Note: Each attendee's e-mail invitation automatically includes a link that the attendee can click to join your meeting, a toll-free number, and a Meeting Number.

As your attendees join your meeting, you see their names appear in the Participants Panel. You can begin your presentation at any time.

Note: You can activate the Chat, Notes, and Polling functions by selecting them on the right side of the Meeting Manager screen. (For more about these features, see the section "Starting Your WebEx Meeting" later in this chapter.)

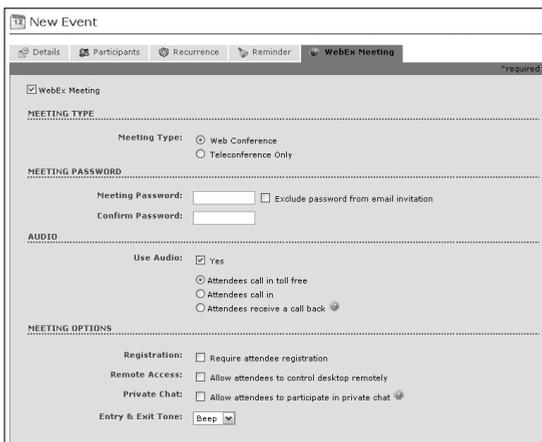
Scheduling a WebEx Meeting in advance

WebOffice lets you schedule a WebEx Meeting, in advance, just as you can schedule a regular office meeting in advance. You can schedule your WebEx Meeting from the Calendar or from the WebEx Meetings page. Here's how.

1. **Click WebEx Meetings in the menu on the left of any WebOffice page.** The WebEx Meetings page appears.
2. **Click New.** The New Event Page appears.
 - a. **Optional:** You also can click **Calendar in the menu on the left of your WebOffice Home page.** The default Events Page (for today, this week, or this month) appears.
 - b. **Click New.** The New Event Page appears with the Details tab in the forefront.
3. **In the input boxes and check boxes on the New Event page Details tab, specify the details for the meeting and then click the Participants tab.** The Participants tab comes to the forefront, ready for you to specify your invitees, as follows:
 - **To invite WebOffice members:** In the Participants drop-down menu, highlight the names of the WebOffice members that you want to invite to your meeting and then click the Add button.
 - **To invite anyone in your WebOffice Contacts group:** Scroll down the Participants tab. In the Choose a Contact drop-down menu, highlight the name of the first contact you want to add to your invitee list and then click the Add button. Continue adding each contact individually until you have invited everyone you want.
 - **To invite people who are neither WebOffice members nor contacts:** Type the e-mail addresses in the Enter Email Addresses input box and then click the Add button beside the input box to invite them to your meeting.
4. **If the Web meeting will be a recurring event, click the Recurrence tab.** The Recurrence tab comes to the forefront.
5. **In the check box and drop-down menus on the Recurrence tab, select the recurrence options for your meeting.**
6. **Click the Reminder tab.** The Reminder tab comes to the forefront. In the check boxes, you can opt to not send an e-mail meeting reminder, to send a reminder to all event participants, or to send a reminder to the people you select from the Reminder drop-down menu.

7. If you opt to send e-mail reminders to the people listed in the Reminder drop-down menu, highlight their names and then click the Add button next to the drop-down menu.
8. Next, click the WebEx Meeting tab on the New Event page. The WebEx Meeting tab comes to the forefront.

Note: If you choose to launch your WebEx Meeting from the Calendar window on the Home page, instead of from the WebEx Meetings page, the WebEx Meeting tab comes to the forefront with the WebEx Meeting box de-selected. You must select it. The WebEx Meeting tab then expands with a list of check boxes.
9. Select your desired options on the New Event page WebEx Meeting tab. See Figure 6-5.



The screenshot shows the 'New Event' page with the 'WebEx Meeting' tab selected. The page is divided into several sections:

- MEETING TYPE:** Radio buttons for 'Web Conference' (selected) and 'Teleconference Only'.
- MEETING PASSWORD:** Fields for 'Meeting Password' and 'Confirm Password', with a checkbox for 'Exclude password from email invitation'.
- AUDIO:** A checked 'Use Audio' checkbox, followed by radio buttons for 'Attendees call in toll free', 'Attendees call in', and 'Attendees receive a call back'.
- MEETING OPTIONS:** Checkboxes for 'Require attendee registration', 'Allow attendees to control desktop remotely', and 'Allow attendees to participate in private chat'. An 'Entry & Exit Tone' dropdown menu is set to 'Beep'.

Figure 6-5: The New Event page with the WebEx Meeting tab highlighted.

10. Click **Save**. A Notify pop-up box appears giving you a choice of Send an Invitation (Response Required), Send a Notification (No Response Required), or Don't Notify.
11. Check your selection, then click **OK**. Your WebEx Meeting Details tab appears. This tab contains the name of the meeting, important details about the meeting, and the telephone and ID numbers you and your invitees need to access the WebEx meeting.

Starting Your WebEx Meeting

After entering all the details for your meeting, you are ready to start your WebEx Meeting. You can start your meeting from several places within your WebOffice. We walk you through the two most frequently used steps. Here's one way to start your WebEx Meeting.

1. On your WebOffice Home page, scroll to the **Calendar Window (shown in Figure 6-6)** and click **Start** beside the listed WebEx Meeting you want to **start**. You see two pages quickly appear and disappear. One page advises you to wait a moment; the second page notes that the meeting is in progress.
2. When you see the **WebEx Meeting Manager page (refer to Figure 6-4)**, you can begin your meeting.



Figure 6-6: Calendar Window on Home page.

You can also start your WebEx Meeting the following way.

1. Choose **WebEx Meetings from the left menu bar**. The WebEx Meetings page appears.

2. **Click Start beside the WebEx Meeting you want to start.** The WebEx Meeting Manager page appears. You now can begin your meeting.

Chatting with meeting attendees

You may want to start your meeting by opening a Chat session online with one, several, or all of your meeting attendees — particularly if your meeting attendees join the meeting early, or if you're waiting for all meeting members to be in attendance before you begin your Web presentation.

1. **To open a Chat session, type your message into the Chat input box where it says Type Chat Message Here (refer to Figure 6-4, the WebEx Meeting Manager page).**
2. **From the drop-down Send-To menu in the Chat Panel, choose the participants that you want to receive your message.**
3. **Click Send.** Your message appears on the Chat box on your screen and on the screens of your designated participants.

Presenting to attendees

When presenting to a broad range of attendees, it's helpful to see who is online and participating in the meeting. WebEx Meetings allows you to do so. You can see the name of each participant appear in the Participants Panel (refer to Figure 6-4) on the upper-right side of the WebEx Meeting Manager page, as they join the meeting.



Note: If you are functioning as the host, a Presenter's Ball icon appears beside your name in the Participants Panel.

Passing the Presenter's Ball

As host, you can pass the Presenter's Ball and make any attendee a Presenter. This option is particularly useful when you are training or teaching, or when you're having a committee meeting or project team meeting.

To pass the Presenter's Ball, click the name of the attendee to whom you want to pass the ball, and then click the Make Presenter button. The person you selected now controls the presentation that all the meeting attendees see. You can pass the Presenter's Ball back to yourself or to another meeting attendee at any time.

Sharing applications

WebEx Meetings let you share your applications with meeting attendees. You can share PowerPoint Presentations, Word documents, spreadsheets, CAD/CAM drawings, photographs, graphic art, and so on. Virtually anything you can look at in an application in your own PC, you can share with meeting attendees — provided they have the same software applications residing on their PCs.

To share an application with your audience, do the following:

- 1. From the menu bar at the top of the WebEx Meeting Manager page, select Share. In the drop-down menu, shown in Figure 6-7, choose Application.** The Application Share pop-up box appears with a list of all the applications you have currently running on your PC.
- 2. Choose the application you want to share by double clicking it.** The application appears on your screen and on the screens of all meeting attendees.

For example, if you want to share a PowerPoint presentation, when the Application Share pop-up box appears, click PowerPoint. All meeting attendees will see your PowerPoint presentation on their screens.

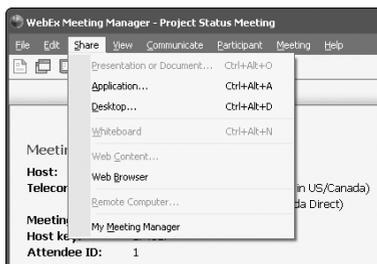


Figure 6-7: Share drop-down menu displaying Application and Desktop options.

Sharing your desktop

You can share your desktop with attendees so that they can see whatever applications you have running on your own desktop.

You can have many business reasons to share your desktop with your meeting attendees. For example, if you are holding a WebEx Meeting with a close-knit workgroup, you may want to share an Excel spreadsheet containing budget numbers, a business plan in a Word document, some CAD/CAM imagery and other applications, and then reference the details in each in rapid fire succession. Sharing your desktop with your meeting attendees allows you to do this with ease.



Be careful if you do share your desktop with participants! When you do, all the meeting participants will be able to see and access literally anything on your desktop. So, if you have confidential information in any application on your desktop, or a joke that you just sent through e-mail to one of your colleagues that you really don't want just anyone to see, don't share your desktop with your meeting attendees! They may find opening and reading everything on your desktop more entertaining than seeing your presentation!

To share your desktop with your WebEx Meeting attendees, click Share in the menu at the top of the WebEx Meeting Manager page, and select Desktop from the drop-down menu. Whatever you have open on your desktop will now be visible to you — and to all of your attendees.

Polling participants

You can poll meeting participants at any time during your WebEx Meeting, and see their responses without ever missing a beat in your presentation. Doing so helps you know whether the content or level of your presentation has your audience engaged or tuning out. By polling, you and all participants can get immediate feedback on any number of issues you want to raise.

To poll participants, follow these simple steps.

- 1. Click Panels at the upper right of your WebEx Meeting Manager screen.** A drop-down menu appears.

- 2. Select Polling.** The Polling Panel, as shown in Figure 6-8, appears.



Figure 6-8: An expanded Polling Panel.

- 3. Click the New button.** An input box appears inside the Poll Questions box.
- 4. Type your poll's question and then choose either Multiple Choice or Short Answer.**

Note: If you choose Multiple Choice, select Single Answer or Multiple Answers from the drop-down menu in the Question section of the Polling Panel.
- 5. Click Open poll.** Your poll appears on the screens of meeting participants. You can see the status of the poll on your screen as participants respond to it (see Figure 6-9).

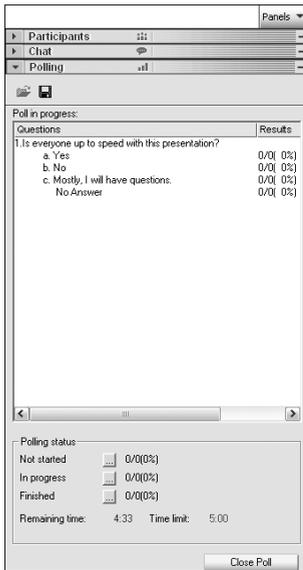


Figure 6-9: The Polling Status screen.

Scheduling a call

If you are a subscriber to WebEx audio services, you can schedule a conference call, or teleconference, quickly and easily with WebEx Meetings. You can schedule a call in conjunction with your WebEx Meeting or simply schedule the call alone by following these steps.

- 1. Click the WebEx Meetings arrow in the menu at the left of any WebOffice page.** A submenu appears.
- 2. Click Schedule a Call in the submenu.** The New Event page appears.
- 3. Enter the requested information in the input boxes and drop-down menus and select the appropriate check boxes, and then click WebEx Meeting.** The New Event Meeting page with the WebEx Meeting tab in the forefront appears, as shown in Figure 6-10.

The screenshot shows a 'New Event' window with several tabs: Details, Participants, Recurrence, Reminder, and WebEx Meeting (which is selected and has a 'required' label). Below the tabs, there is a 'WebEx Meeting' checkbox. The 'MEETING TYPE' section has two radio buttons: 'Web Conference' and 'Teleconference Only'. The 'MEETING PASSWORD' section has two text input fields for 'Meeting Password' and 'Confirm Password', and a checkbox for 'Exclude password from email invitation'. The 'MEETING OPTIONS' section has a dropdown menu for 'Entry & Exit Tone' set to 'Beep'.

Figure 6-10: New Event Meeting page with WebEx Meeting tab in the forefront.

4. **Select the Teleconference Only meeting type.**
5. **Click Save.** The Notify pop-up box appears.
6. **From the options, click to select either Send an Invitation (Response Required), Send a Notification (No Response Required), or Don't Notify. Then click OK.** Your teleconference page (Name of your Call) appears, as shown in Figure 6-11. This page contains the Title, Date, Time, Location, and Description of your teleconference. The page also contains any files you have uploaded, the telephone number for you to call in toll-free, and your Meeting ID Number and Host Email address.
7. **To start your teleconference, dial your meeting's telephone number. At the prompt, enter your Meeting ID Number on your telephone keypad, followed by the # sign.**

Joining a meeting

When a WebEx Meeting host invites you to a meeting, you receive an invitation e-mail message that includes instructions, a Meeting ID Number, a teleconferencing number, and a link that you click to join the meeting.

If you did not receive an e-mail invitation to a meeting, you still can join a meeting directly from your WebEx Meeting page, or from your Home page Calendar window, as long as someone gives you the Meeting Identification Number.

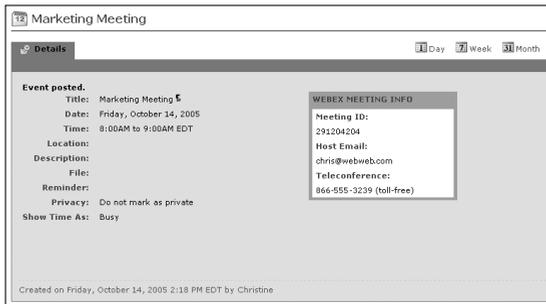


Figure 6-11: Your Teleconference (Name) page.

To do so, insert the Meeting Identification Number in the Join a WebEx Meeting input box at the top of the WebEx Meeting page, or in the Calendar window of the Home page, and click the arrow.

Chapter 7

Working with the Task Manager, Discussion Forums, and Other Tools

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In This Chapter

- ▶ Getting acquainted with online task management
 - ▶ Making company-wide announcements
 - ▶ Using discussions to brainstorm and share ideas
 - ▶ Polling to get feedback
-

With these four WebOffice online collaboration tools — Task Manager, Announcements, Discussion Forums, and Opinion Polls, you can communicate efficiently with colleagues, employees, business partners, clients, and so on. You can reach anyone at anytime and anywhere and make it convenient for them to respond to you. And, you and your colleagues have ongoing access to the record of your online information exchange.

In this chapter, we show you how to quickly set up and start using these collaboration tools so that you can create a new task for yourself or a team member, make an announcement to your WebOffice members, begin a discussion, and conduct a poll.

Discovering the Task Manager

With WebOffice Task Manager, shown in Figure 7-1, you can do the following:

- ✔ Manage multiple projects, coordinate local and remote project teams, and track progress to deliver results.
- ✔ Create tracking for multiple projects, then view or print only the tasks associated with a specific project.
- ✔ Assign permissions to department or work team members so that they see only the tasks that relate to their project.
- ✔ Supervise several projects while protecting the confidentiality of each one.
- ✔ Create tasks associated with various projects and categories.
- ✔ Delegate tasks to staff or project team members, while still monitoring their status. You can make the tasks visible to other team members so that the group can track progress from anywhere, anytime.
- ✔ Know the status of critical deliverables at all times, because the Task Manager keeps track of deadlines and reminds you when tasks are coming due.
- ✔ Monitor tasks at risk and determine where additional resources must be invested.
- ✔ Print your task list, sorted by project, category, or delivery date.
- ✔ Take control of your personal to-do list and track personal action items privately.
- ✔ Synchronize your task list with your Palm handheld or with Microsoft Outlook.

With Online Task Management, you can create a new task for yourself and other members of your WebOffice and then track its progress from start to completion.

To add a new task, do the following:

1. **Click Tasks in the menu at the left of your WebOffice Home page.** The Tasks page appears.

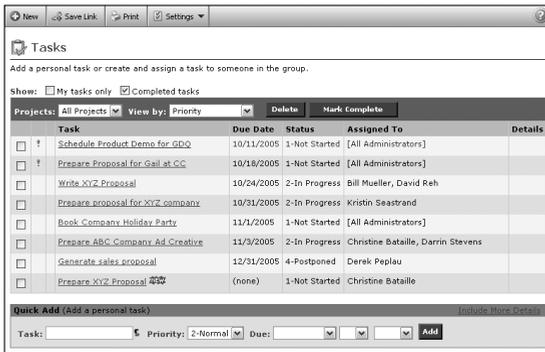


Figure 7-1: From the Task Manager page, you can perform a variety of functions.



- 2. Select New.** The New Task page appears (see Figure 7-2).
- 3. Fill in the details about the task in the input boxes, make any selections from the drop-down lists on the New Task page, and then click Save.**

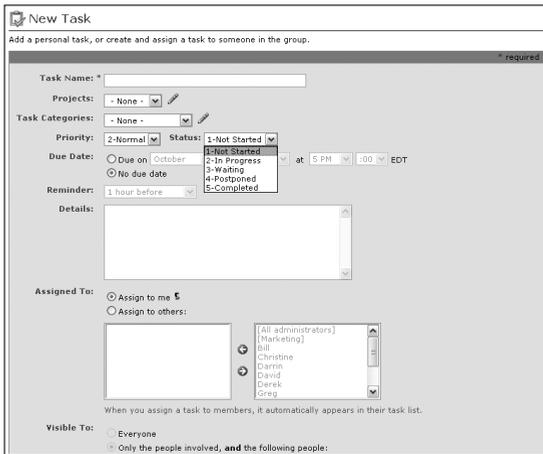


Figure 7-2: The New Task page with drop-down menus and input boxes.

You can view tasks and sort them by a number of views, including priority, status, due date, assignment, and other task categories. You can view your own tasks and any others that you are authorized to see.

Making Company-wide Announcements

You can use WebOffice Announcements to announce anything under the sun to the members of your WebOffice. For example, you can announce new company benefits and policies, deadlines for healthcare and 401(k) enrollments, sales person and employee-of-the-month awards, key achievements, company quarterly results, project milestones, employee events, and so on. You can post all of the latest news and pictures for your group.

Organizing and displaying Announcements

The Announcements feature appears on your WebOffice Home page where members can see it when they log in. Here's a list of some ways you can organize and display your announcements. You can

- ✔ Organize announcements in folders so that they can be seen grouped together by topic in the Announcement section of the Home page.
- ✔ See Announcement folders sorted and displayed in alphabetical order in the Announcement section of the Home page.
- ✔ Read an entire Announcement simply by clicking the announcement's linked headline.
- ✔ Display Announcements (without folders) at the top of the Announcement section on the Home page, with the newest announcements (seven days old or less) or urgent announcements (appearing in red) displayed first.
- ✔ Automatically display an *indicator* (a red exclamation point) on folders containing urgent announcements in the Announcement section, so that members notice them right away when they log onto the Home page.
- ✔ Create customized announcements and newsletters for your group using the rich text editor directly or by



cutting and pasting documents and Web graphics into the editor.

- Include a link to registration forms or to documents in your WebOffice Document Manager.

Here are a few of the ways WebOffice users take advantage of Announcements.

- **Staffing firms:** Post notifications for remote consulting staff.
- **IT consultants:** Communicate with employees overseas.
- **Realty firms:** Feature recent closings in a virtual bulletin board.
- **Universities and research institutes:** Post everything from industry articles to financial updates to standard forms, procedures, and policies.
- **Banks and credit unions:** Announce daily rate changes to tellers and financial sales representatives.

The list could go on and on.

You can make your Announcement section look like the one shown in Figure 7-3, for example.



Figure 7-3: Announcements section on a typical WebOffice Home page.

You can also make your Announcement section look like an online newsletter, as shown in Figure 7-4, if you prefer.



Figure 7-4: You can choose to have your announcements read like a newsletter.

Adding new announcements

The first time you create an announcement, you are prompted to download the *EditLive!* rich text editor. This editor enables you to include rich text elements — such as customized font colors and sizes, pictures, links, and tables — in your announcements.



You must be using one of the supported browsers in order to use the rich text editor. For PCs: Microsoft Internet Explorer 6, or Netscape 7.2. For Macintosh: Netscape 7.2.

To add an announcement, follow these steps.

- 1. On your WebOffice Home page, in the Announcements section, click New.** The New Announcement page appears.

Note: If you are the WebOffice administrator, or have been given permission by the administrator, you can use this function. (For more on administrators, see Chapter 8.)

If you haven't already downloaded the rich text editor, you are prompted to do so now. Depending on your

connection speed, this download could take several minutes.

2. **On the New Announcement page, enter the Headline in the text input box.** The Headline is what appears in the Announcements list on your Home page.

Note: The Visible checkbox is already pre-selected by default to display the announcement on your WebOffice Home page. If you do not want the announcement to display on the Home page, de-select the Visible checkbox. If you hide an announcement, the announcement continues to be stored on the Announcement List page with a red status indicator.

3. **Indicate whether the announcement should appear in an existing folder or in a new folder.**

To create a New folder, do this:

Add Folder

- a. **Click the Add Folder button.** The New Folder page appears.

- b. **Enter the Folder Name in the input box marked Folder Name and then click Save.** The folder you create is added to the Folder drop-down list on the New Announcement page.

4. **Enter the remaining details on the New Announcement page, shown in Figure 7-5.**

5. **When you are finished, click Save.**

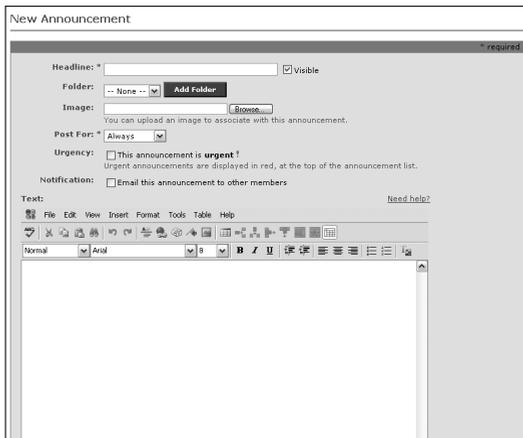


Figure 7-5: The New Announcement page.

Brainstorming with Discussion Forums

In creating an online Discussion Forum, you are basically opening up to your WebOffice members an online bulletin board where they can write/post comments and read other members' comments in a well-organized space. You and your WebOffice members can create and follow discussion threads on virtually any topic you choose.

Using online Discussion Forums, you can facilitate many different types of communication and collaboration. Here are some examples.

- ✔ **Sales and marketing teams:** Post the latest information on the competition — from sales calls, trade shows, conferences, and so on — online. The sales force can give feedback to the marketing team about what they need for new sales tools, collateral, and more.
- ✔ **Product development teams:** Brainstorm new product ideas by posting them online where everyone can comment on them.
- ✔ **Human resources and employee communications:** Encourage employee involvement in company policymaking by creating a Discussion Forum that functions as an online company suggestion box. You can solicit ideas from headquarters and remote employees to build company loyalty across geographic boundaries.
- ✔ **Project teams:** Comment on and clarify project proposals, requirements, specifications, and deliverables. Team members can contribute at any time of day, from anywhere in the world. They can post minutes of prior team meetings and solicit comments between meetings. Project team members can post daily updates to report the status of open issues. You can conduct discussions among the members of the entire group or limit access to specific users for confidential or sensitive issues.
- ✔ **Event management teams:** Discuss upcoming event ideas, plans, and logistics.
- ✔ **Committees of all types, sizes, and descriptions:** Keep members interested and projects moving forward between monthly meetings.

Creating Discussion Forums

In this section, we show you how to create a new Discussion Forum, add topics and messages, reply to messages, edit and delete messages, and notify other WebOffice members about your message.



Discussions are divided into *forums* to enable focused discussions. Within each forum, you might find several different message threads or topics relating to the forum.

To start an online discussion, you first create a forum and then add topics to the forum. After you start a discussion, you can send your members an e-mail that contains a hot link to the Discussion Forum and invite them to join in.

Here's how to create a new forum.

1. **Click Discussions in the menu at the left of your WebOffice Home page.** If an administrator has given you permission to create new forums, you see the New button on the All Discussions page, shown in Figure 7-6. If you haven't been given permission and you want to create new forums, contact your WebOffice administrator.
2. **Click the New button at the top of the All Discussions page.** The New Forum page appears, as shown in Figure 7-7.
3. **In the input boxes provided, type the name and description of the forum.**
4. **Click Save.**

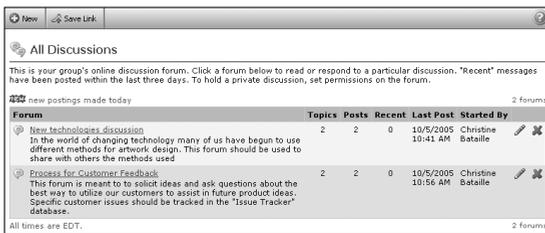


Figure 7-6: The All Discussions page lists all the Discussion Forums for your WebOffice.

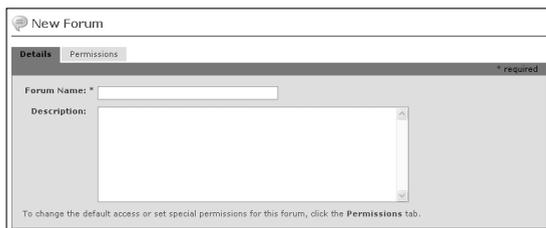


Figure 7-7: New Forum page.

Starting a new discussion topic in an existing forum

You can start a new discussion thread or topic in an existing forum. Here's how.

1. **To start a new topic in a Discussion Forum, go to the Forum you want to add to and click New at the top of the page.** The New Message page appears.
2. **Type the subject in the input box, and then attach any files you want, fill in the Message box, and click Save.** The Forum's main page appears with the topic you created visible to all members. Members can then click the topic and reply to it.

You and others can continue to reply to topics, edit messages, and delete messages on an ongoing basis.

Replying to a topic

To reply to a topic and to subsequent replies and messages within that topic in an ongoing discussion, follow these steps.

1. **Click the Topic you want to view or to make a contribution to by adding your own message in reply.** The Topic page appears.
2. **Click the Reply button.** The New Message page appears.
3. **Type your message in the input box and then click Save.** Your message is posted instantly, and you see it in the discussion thread on the RE: (Topic Name) page.

Editing messages

You can edit any message you create. Simply do the following:

1. **Find the message you want to change and then click the Edit button.** The Message screen appears.
2. **Change any of the information in the message and then click Save.**

Deleting messages

You can delete any message you created. When you delete a message, you also delete any associated replies.

To delete a message:

1. **Find the message you want to delete and then click the Delete button.**
2. **If you're sure that you want to delete the message from your WebOffice, click the Yes button on the confirmation screen.**

A dark gray rectangular button with the word "Yes" written in white, sans-serif font.

Notifying members of new messages

After you post a message, you can automatically send an e-mail notification about it to members and invite them to join that discussion. The e-mail message contains a hot link that goes directly to that Discussion Forum and message.

To send an e-mail with a message link, do this.

1. **Find the message you want to notify members of and click it.** This displays the actual message page.
2. **Click Send Link.** The Send Link page appears.
3. **Fill in the information on the Send Link page.** Include the names of the people you want to send the e-mail to and whether you want to hide recipients from each other in the e-mail address.
4. **Click Send.** Your e-mail will be sent to the members you have designated.

Getting Feedback through Opinion Polls

You can use WebOffice Opinion Polls for a wide variety of purposes: to involve your WebOffice members in policy decisions or process changes, to find out what options your employees favor for outings or holidays, to solicit sales reps' opinions on new marketing materials, to allow project team members to vote on priorities, to solicit opinions of remote employees, and so on. You can use it for virtually any polling topic.

In this section, we show you how to set up a Single-Answer and a Multi-Answer poll.

Creating a poll

In *Single-Answer* polls — you guessed it: Members may choose only one answer to your question. In *Multi-Answer* polls, yes, members may choose multiple answers. See Figure 7-8 for an example of a Single-Answer poll.

The image shows a web browser window displaying a poll. At the top, there is a "Vote" button. Below it, the "Poll Question" is "Where should we hold the annual Sales Meeting?". There are four radio button options: "Ritz Plaza", "Copley Inn", "Holiday Plaza", and "Museum of Fine Arts". A "Vote" button is located at the bottom of the poll options. Below the poll options, a small text box says "Your vote will be displayed with the poll results."

Figure 7-8: Single-Answer poll.

Site administrators can allow guests to participate in polls if they permit guest access to the site. Guests will be allowed only to place their vote and view results (if you choose to show poll results); they will not be able to view individual responses.

You can choose to let members view the running tally of votes as the poll is taking place. Or, you can hold the results until the poll is closed. You can also choose to automatically e-mail the final poll results to all members of your site or just to yourself.

When you create a poll, make your selections carefully so that you don't need to make changes after the poll opens.



1. **To create a poll, click Polls at the left of your Home page.** The Polls page appears.
2. **Click New at the top of the Polls page.** The New Poll page appears (see Figure 7-9).
3. **Fill in the basic information about your poll.**
4. **Choose whether you want members to be able to pick multiple answers or just a single answer.**
5. **Enter all the possible responses to your poll.**
6. **Choose how long the poll will remain open.**
7. **Decide whether you want the poll to appear on your Home page.**

Note: Only one poll appears on the Home page at a time. If more than one poll is open, the newest published poll shows up on the Home page.
8. **Select whether you want to notify members by e-mail when the poll opens.**
9. **Select whether members can identify who votes for what.**
10. **Indicate when members will see the results of the poll.**
11. **Designate which members can see and vote in the poll.**
12. **Click Publish.** The Publish Poll page appears.
13. **Review your poll's questions and options and if everything is correct, click OK.**

Your poll will be sent to the members you designated. After they all have voted, you can view results and close the poll.

Making changes to a poll

If you change any of the criteria for your poll, prior results become invalid. This means that when you make changes to an open poll, any votes members have already entered are discarded and the poll is restarted.

Figure 7-9: The New Poll page.

To make changes to a poll:

1. Click Polls in the menu at the left of your WebOffice Home page. The Polls page appears.



2. Click the Edit icon next to the poll you want to modify. The Edit Open Poll page appears. You cannot edit the question and answers of an open poll on this page, but you can edit all other poll properties on this page, such as notification, visibility, anonymity parameters, and so on.

3. If you want to change only the poll properties, do so in the input and check boxes on this page and click Save.

4. If you want to edit the poll question and answers, go back to the Edit Open Poll Page and choose [Click here to edit questions and answers](#). The Edit and Restart Open Poll page appears. This will clear all existing votes and restart the poll. Enter the new poll questions and answers in the input boxes.

5. Make your selections regarding the poll properties in the More Options section of the page.

6. Click Publish. The Poll Preview page appears.

7. If the poll question and answers are what you want, and the poll options are correct, click OK.



You can make changes to a poll only if you created the poll, or if you are an administrator.

Closing a poll

You can close your poll in two ways. Here's how.

- ✓ **Automatically:** When you set up the poll, choose the date on which you want it to close.
- ✓ **Manually:** Click Polls in the menu at the left of your WebOffice Home page. The Polls page appears. Find the poll you want to close, and then click Close Poll beside it. The Close Poll page appears; Click OK.

Viewing a poll

You can share poll results with participants. To view the poll, members of your WebOffice simply follow these steps.

1. **On the Home page, click Polls in the left menu.** The Polls page appears.
2. **Click Results on the poll you want to view.** The Polls Results page appears (see Figure 7-10).

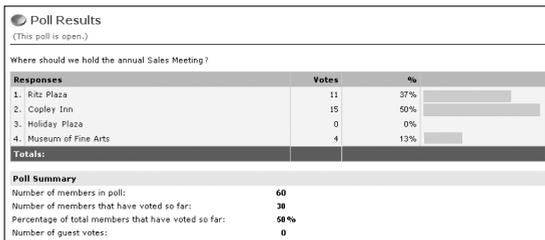


Figure 7-10: The Polls Results page.

Part III

The Part of Tens

The 5th Wave

By Rich Tennant



"Sharing the desktop is part of our total immersion program here for new hires."

In this part . . .

Here's where it gets personal. You want your WebEx WebOffice to be totally you — in sync with the way you do business, the way you see your organization, the way you see the world. So, in Chapter 8, we show you administrators ten ways to customize your WebOffice so that it reflects your style, your business practices, your goals, and your values. And, because it's usually more fun when you share the workload, we tell you in Chapter 9 the ten top items you can post on your WebOffice to grab and hold the interest of your WebOffice users.

Chapter 8

Ten (Plus) Ways to Customize Your WebOffice

In This Chapter

- ▶ Understanding what tools are available for customization
 - ▶ Customizing WebOffice to fit your style and needs
-

In this chapter, we show you ways that WebOffice administrators can customize the look, feel, and functionality of WebOffice to suit the needs of your business or organization. If you're not an administrator, you can skip this chapter — or you can read it anyway if you'd like to find out about cool customizations you can ask your WebOffice administrator to set up for you. That's entirely up to you.

Adopting New Color Schemes

WebOffice administrators can choose from more than 30 different color schemes to customize WebOffice. Here's how.

1. **From your WebOffice Home page, choose Administration.** The Site Administration page appears.
2. **Select Customize Appearance.** The Customize Appearance page appears.

- 3. In the Look & Feel section, scroll down to the Color Scheme drop-down menu, and select one of the color schemes.**
- 4. When you are finished choosing your color scheme and any other customizing options on this page, click Save.** Your WebOffice appears with its new color scheme.

Customizing Your Home Page

To customize your WebOffice Home page, you (administrators) can

- ✓ Add a message and an image, such as your corporate logo.
- ✓ Create more onscreen workspace by collapsing the menu and changing your Home page windows.

Here's how.

- 1. From your WebOffice Home page, choose Administration.** The Site Administration page appears.
- 2. Select Customize Appearance.** The Customize Appearance page appears.
- 3. In the Look & Feel section, browse your own files to select a logo for the Home page, and then click your selection.** The file for the logo appears in the input box next to the Browse button.
- 4. From the Logo Position drop-down list, choose a position for the logo.**
- 5. In the Home Page Message section, select Show Message and then click the Edit button.** The Edit Home Page Message page appears with a text box in which you can enter the message you want displayed on your Home page.
- 6. Create your new message and then click Save.** The Customize Appearance screen reappears.

Note: You will see the message on your Home page the next time you visit it.

- 7. Scroll down the Customize Appearance page to the Home page Content and Layout section and choose a One-Column or a Two-Column layout for your Home page.** If you select a **One-Column** layout, all of your documents, graphics, and other items to be laid out on the Home page appear listed in a single input box.

If you select a **Two-Column** layout, all of your items to be laid out on the Home page appear listed in the left-column input box. You also see a right-column input box that is empty.

- 8. Optional: You can switch any of the items in the left-column input box into the right-column input box by highlighting the items and using the side-to-side arrows.** Switching the items in the list switches the items in the layout on your Home page.
- 9. Optional: You can switch the top-to-bottom order of the items in both columns, using the up or down arrows.** Switching the items up or down in the column input boxes also switches the items up or down in the layout of your Home page.
- 10. When you are finished customizing your Home page, scroll to the bottom of the page and click Save.** Your new layout appears on your Home page exactly as you designed it.

Customizing Your Home Page Menu

Administrators can add, remove, reorder, and organize the WebOffice Home page menu items to fit your group's needs. Follow these steps to do so.

- 1. From your WebOffice Home page, choose Administration.** The Site Administration page appears.
- 2. Click Customize Navigation.** The Customize Navigation page appears with the Navigation tab highlighted.

3. **From the menu mockup that appears, select an item, such as Documents or Databases, that you want to reposition within the menu bar on your Home page and reposition it by using the up or down arrows beside the menu mockup.**

Note: If you prefer to have the menu item in the Quick Links section at the top of your Home page, highlight the item in the menu mockup and then click the slanted arrow beside the menu mockup. Doing so moves the item from the menu on the left of your Home page and repositions it in the Quick Links section menu.

Customizing Navigation

You have many places within your WebOffice where you can set up links to an application page or an external site on the Web. Administrators can add and subsequently manage these four types of links from the Customize Navigation page.

1. **From your WebOffice Home page, choose Administration.** The Site Administration page appears.
2. **Click Customize Navigation.** The Customize Navigation page appears.
3. **Select any of the following tabs:**
 - **Home Page.** This tab displays all of the links that reside in the Links window of your Home page. The links are divided into two sections: Public Links and My Links (personal). You can create a new link, move a link, or delete a link from this page, using the New, Move, and Delete buttons.
 - **Shortcuts.** Using this tab, an administrator can add shortcuts links that appear in the Shortcuts submenu. Members can view the shortcuts in a Read-Only list on the Shortcuts tab.
 - **My Favorites.** Members *and* administrators can add custom personal links to the menu. The links appear under My Favorites when you click the My Favorites arrow in the menu at the left of the Home page.

To add a link, click the My Favorites tab, then click New. The New Link (Favorites) page appears. Enter the information about the link, and then click Save. When you click the My Favorites arrow on the menu at the left of your Home page, these links appear. **Note:** The links are visible only to the individual user who added them, not to the group.

- **Navigation.** Both the applications and the links can be placed by administrators only, either in the menu at the left of your WebOffice or in Quick Links. You can move any item in the menu to Quick Links and any item in Quick Links to the menu.

Customizing Your Locale Settings

WebOffice administrators can specify the default language and time zone for your WebOffice. Individual users may specify a language and local time zone on the Member Options page.

1. **From your WebOffice Home page, choose Administration.** The Site Administration page appears.
2. **Select Customize Appearance.** The Customize Appearance page appears.
3. **Scroll down the page to the Locale section and in the Language drop-down menu, choose a language.**
4. **In the drop-down menu for Local Time Zone, choose your local time zone. Then scroll to the bottom of the page and click Save.**

Customizing Your Applications

WebOffice administrators can choose the applications and services you would like to appear in your WebOffice User Interface. Here's how.

1. **From your WebOffice Home page, choose Administration.** The Site Administration page appears.

2. **Select Customize Appearance.** The Customize Appearance page appears.
3. **Scroll to the WebOffice Features section and check what you want to appear on your WebOffice.**
4. **When you are finished with this and any other specifications on your Customize Appearance page, click Save.**

Customizing Applications Settings

WebOffice administrators can customize the period of time that you want items in your applications to appear as “new.” You can designate items in the Announcement section, Database Manager, Discussion Forums, Document Manager, and Members section to appear as “new” for a number of days. You can also specify what you want to appear in the “What’s New” section of your Home page and how many days’ worth of events show up in your Calendar.

1. **From your WebOffice Home page, choose Administration.** The Site Administration page appears.
2. **Select Customize Appearance.** The Customize Appearance page appears.
3. **Scroll down to the Applications Settings section and make your selections in the drop-down menus.**
4. **When you are finished, click Save.**

Setting Feature Permissions

WebOffice administrators can set feature permissions for members and guests. Guests can access your WebOffice only if you specifically allow them to. To give another member administrator-level access, administrators can edit the member profile from the Member list.

To set Feature Permissions:

1. **From your WebOffice Home page, choose Administration.** The Site Administration page appears.
2. **Click the Feature Permissions link.** The Feature Permissions page appears.
3. **Make your selections using the check boxes and then click Save.**

Enabling Full-Text Search

Normally, when you search for a document, you search for the title of the document, keywords, or a short description. With WebOffice premium Full-Text Search, you can search the contents of all files uploaded to your Document Manager as well. Doing so allows you to find documents even when you don't know (or have forgotten) the name of the file and perhaps have only a vague idea about what its keywords or description might be.



As a WebOffice administrator, you decide whether and when to subscribe to this premium service and enable Full-Text Search for your WebOffice. After you enable this option, all WebOffice members and guests can use Full-Text Search.

Your Full-Text Search scans all the text in all uploaded files — whether your searches start from the Search shortcut, the top of your Document Manager, or the Advanced Search page.

Here's how to enable Full-Text Search for your WebOffice:

1. **From your WebOffice Home page, choose Administration.** The Site Administration page appears.
2. **Under the About Your Subscription heading, select the Additional Services link.** The Additional Services page appears. Here you can read about the Full-Text Search option and various other services, such as additional file storage and additional e-mail storage. You also can get prices and order these services online.

Customizing the Group Calendar

Administrators can customize default Calendar options, such as the Time Format and whether new events are Personal, Group-wide, or Participant Events by default. Administrators set the WebOffice defaults for Calendar settings. Individual members then use these site defaults, unless they choose to personally customize the settings based on their own preferences.

To change your Personal settings, follow these steps.

1. **From your WebOffice Home page, choose Calendar.** The Calendar page appears.
2. **Click Settings in the top menu bar.** The Member Options page appears.
3. **Make your selections and click Save.**

Customizing Expense Reports

Administrators can customize the WebOffice Expense Report settings, such as Your Currency, Mileage Reimbursement Rate, and Expense types. When you customize Expense Reports, your changes appear on a site-wide basis and affect new expense reports only. Existing reports are not impacted.

To edit your Expense Report options:

1. **From your WebOffice Home page, choose Expense Reports.** The Expense Reports page appears.
2. **Click Settings at the top of the page.** The Expense Report Settings page appears.
3. **Select any option changes and then click Save.**

Changing Your Site URL

If you're a WebOffice administrator, you can change your site's address. This feature is useful, for example, when you're using WebOffice for a project that is ending, and you want to

roll the information on the site over to a new project. You don't have to create an entirely new WebOffice site; you can simply change your WebOffice URL, or address, and modify the information on the site. When you change your URL, users can log in by using their same login names and passwords.

To change your site address, do the following:

- 1. From your WebOffice Home page, choose Administration.** The Site Administration page appears.
- 2. Click Change Your WebOffice Address (URL).** The Change Your WebOffice Address page appears.
- 3. Type the new URL in the input box.**
- 4. Check the Notify All Members box.**
- 5. Click Save.**

Chapter 9

Ten Top Items to Post on Your WebOffice

.....

In This Chapter

- ▶ Making company forms available
 - ▶ Giving employees a suggestion box
 - ▶ Notifying employees about policies and procedures
 - ▶ Polling your employees
-

You can jump-start usage of your WebOffice by introducing your members to WebOffice applications in the natural course of your everyday business activities.

In fact, you can use the following information as a jumping off point to get your employees energized about using your new WebOffice. You'll find no faster way to get employees involved, and to elevate morale, than by sharing information. The key to a successful WebOffice launch is to post information that matters to your employees. Here are some suggestions for peaking members' interest, and these are just the beginning.

Posting Your Company's Holiday Schedule

You can post your company's holiday listing to your WebOffice Announcements and Documents sections. Then you can use your WebOffice Send Link feature to send all employees a link to the holiday schedule via e-mail. Employees are always eager to view schedules that will help them with their vacation and holiday plans.

Uploading Company Forms

You can post all your commonly used business forms to your WebOffice Documents section. Here are some examples of forms you may want to post:

- ✔ Supply Orders
- ✔ Benefits Enrollment
- ✔ Purchase Orders

Once the forms are posted, you can use your WebOffice Send Link feature to let employees know where to find the forms. This feature allows you to reduce storage for hard copies, and save time and expense.

Creating Links to Key Web Sites

On your WebOffice Home page, you can use the Group Links section to connect employees with essential information. You can also post links to the Web sites of key outside companies, such as:

- ✔ Benefits providers
- ✔ 401(k) providers
- ✔ Suppliers
- ✔ Vendors

Creating an Employee Suggestion Box

You can create a Discussion Forum and allow employees to post suggestions for various company policies and procedures. You can start new topic threads and use the Send Link feature in your WebOffice to invite employees to participate. This feature could be the single biggest morale-builder you'll implement all year.

Building an Employee Directory

You can input basic information about your employees in the WebOffice Members Directory, such as name, e-mail address, phone number, and mobile/cell number.

You can encourage employees to fill in their Member Profile with more details, such as title, department, additional phone numbers, and a photo as they start using WebOffice. You could even ask an employee to spend a few hours walking around with a digital camera, taking employee photos, and then uploading them to the Members Directory. This fun and friendly approach to employees' records can prove invaluable for new employees who are still learning to match names with faces.

Posting Policies, Procedures, and Training Materials

You can post your company's policies, procedures, benefits summaries, training materials, and so on to the Documents section of your WebOffice site.

You can use the Send Link feature of your WebOffice to notify employees that these documents are available and easy to access. You can also use Send Link to inform new employees about these documents, and to notify all employees any time the information changes.

Creating an Employee Bulletin Board

You can create an employee bulletin board in the Discussions section where employees can

- ✔ Advertise used cars and bicycles for sale
- ✔ Seek out roommates
- ✔ Advertise to share a vacation home

Employees want to keep up with what's happening and when. Incorporating both business-oriented and social items ensures frequent traffic.

Starting a Company Meetings and Events Calendar

You can gather a list of the dates and times of important company meetings, such as sales meetings, annual and quarterly company briefings, benefits review, and so on, and post this meeting information in the shared Calendar. You can then set reminder notices so that employees are notified as the dates approach.

In addition to posting important business meeting dates, you can schedule the fun stuff too, such as summer outings and holiday parties.

Creating an Employee Newsletter

When important milestones occur, you can post the information in your WebOffice Announcement Section. You can use the rich-text editor to create headlines and insert photos and graphic elements to turn the information into your company's online newsletter. Besides company milestones, you can create news items about personal events (such as marriages and births) and also about company awards and honors (such as sales person or employee of the month). Employees can tune in frequently to see what's happening with their coworkers.

Posting a Poll for Employees

You can post an opinion poll on your WebOffice Home page and involve your company's employees in important business decisions, or simply get their input for fun and morale-boosting events. You'll benefit from increased creative input, and your employees will know that their opinions matter. You can poll employees about anything and everything from marketing campaigns and Human Resources policy changes to outing venues and lunchroom specials.

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