



Cisco WebEx Social: Getting Started Guide, Release 3.0

Cisco WebEx Social is a social collaboration solution that is delivered through the Cisco Collaboration Cloud. With it Cisco WebEx Social, employees can:

- Find experts, communities, and content from a personalized dashboard
- Share knowledge with individuals and across communities through a unified posting model
- Communicate and collaborate with colleagues in the context of a particular project or topic
- Work anywhere with out-of-the-box mobile access

Contents

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- [Introduction to Cisco WebEx Social, page 1](#)
- [Get Started with Cisco WebEx Social, page 9](#)
- [What and When to Post, page 27](#)
- [Search, page 28](#)
- [Content Visibility in Cisco WebEx Social, page 31](#)
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Introduction to Cisco WebEx Social

The goal of this product is to enable easy and efficient collaboration between individuals, teams, and communities within the enterprise. These sections provide a brief overview:

- [Features, page 2](#)
- [Supported Browsers, page 2](#)
- [User Interface, page 3](#)



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- [Applications, page 7](#)
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Features

Cisco WebEx Social features include:

- Collaboration between individuals, across teams, and within communities
 - Share ideas through posts, blogs, discussions, and wikis.
 - Instant message or set up a Cisco WebEx meeting with just one click.
 - Manage and share documents.
 - Work more efficiently by posting status messages, using RSS feeds, and tagging information.
 - Invite people who have not yet joined.
 - Collaborate on Microsoft Office documents saved in Cisco WebEx Social.
- Security
 - Rules-based policies for fine-grained access control.
 - Extensive logging and recording.
 - Open, Restricted, and Hidden Communities allow for simple control over who can find and access content.
- Open Architecture
 - Enables enterprise mashups through standards-based interfaces.
 - Enables out-of-box integration with Microsoft Exchange or Lotus Domino for displaying calendar events.
 - Provides seamless integration with Cisco WebEx Connect Instant Messaging, Cisco WebEx Meetings, and Microsoft Office for document collaboration (supported versions subject to change).

Supported Browsers

For supported browsers and browser version, as well as other supported software that integrates with Cisco WebEx Social, see *Cisco WebEx Social Compatibility Guide*.

User Roles

A role is of a set of permissions given to users that defines what actions they can take and what access they have after they sign in to Cisco WebEx Social. The following are the default roles, though System Administrators can create new ones:

- Guest—A person who can view content if permitted.
- User—A person who signs in with a username and password, and who can create public and private pages.
- Owner—A person who has created an object, such as a blog entry, a wiki, or a document.

- **Community Owner**—A person who created and is a super user of their community. They can assign community roles to other users.
- **Community Administrator**—A person who is a super user of their community, but cannot assign the role of Community Administrator to any other users.
- **Community Member**—A person who belongs to a community.
- **Compliance Officer**—A person assigned to handle content that is reported by users as inappropriate or incorrect. (Only a System Administrator has the ability to assign this role to a user.)
- **Administrator**—A person who is a super user, and can do everything.
- **Level 1 Administrator**—A person who has a subset of the Administrator privileges.
- **Hidden Community Creator**—A person who is allowed to create hidden communities.
- **Open Community Creator**—A person who is allowed to create open communities.
- **Power User**—Power Users have their own public and private pages.
- **Restricted Community Creator**—A person who is allowed to create restricted communities.

Each new user has the following roles included by default:

- Power User
- Open Community Creator
- Hidden Community Creator
- Restricted Community Creator

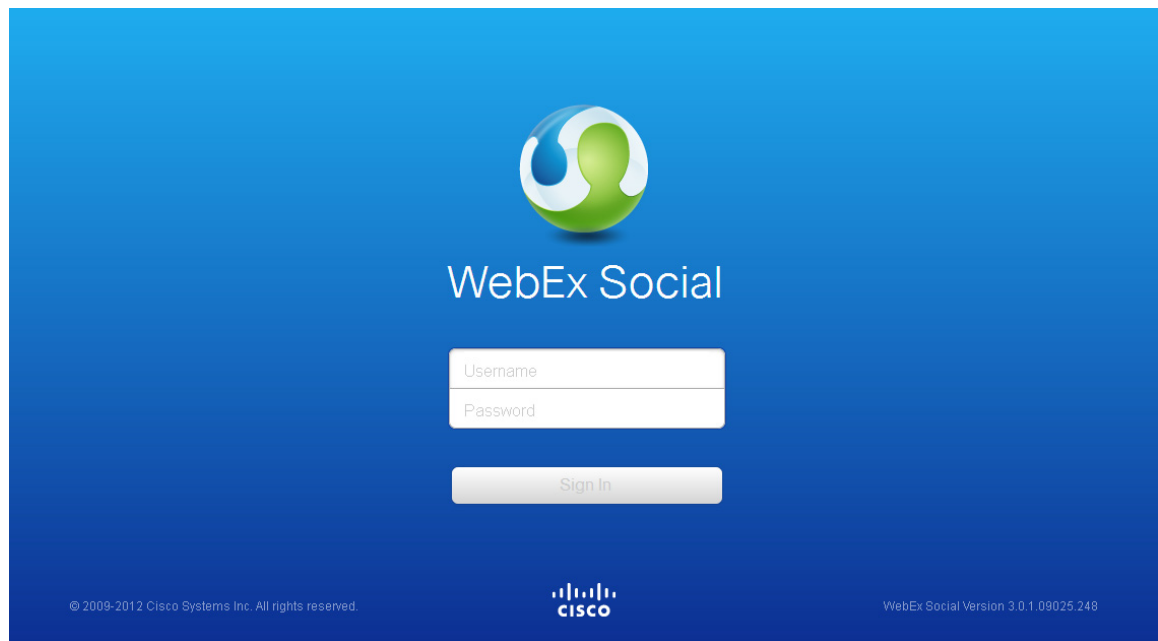
User Interface

The Cisco WebEx Social interface is made up of the following:

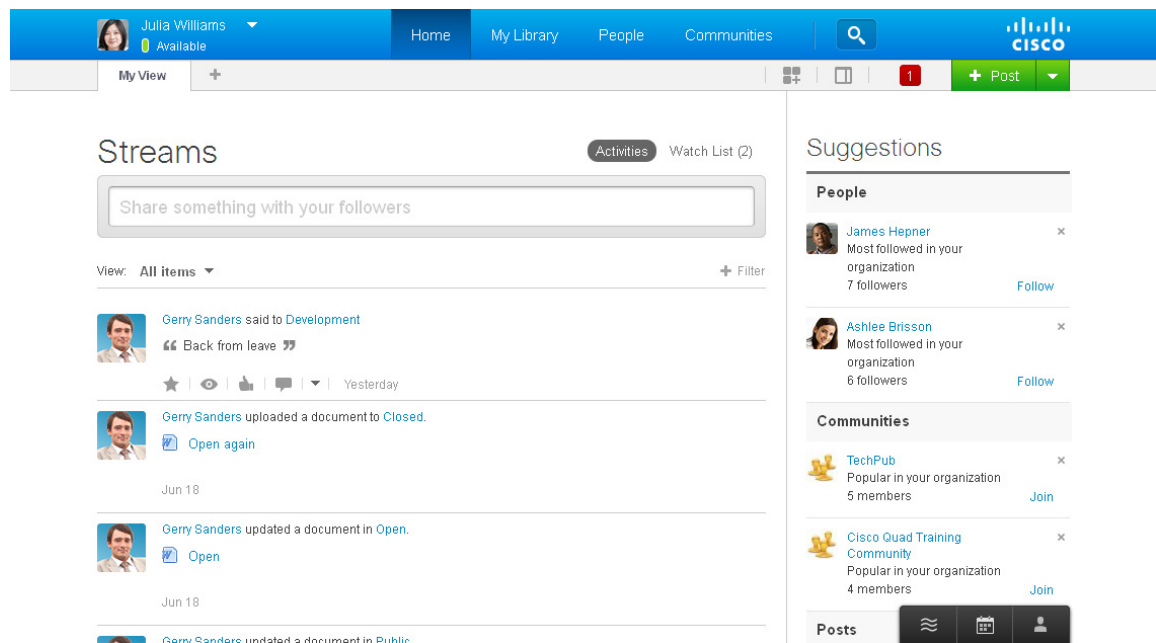
- [Sign-in Page, page 3](#)
- [Global Navigation Bar, page 5](#)
- [The WebEx Social Dock, page 5](#)
- [Getting Help or Providing Feedback, page 6](#)


Sign-in Page

Before you sign in to Cisco WebEx Social, you see this screen:



After you sign in, you are by default on the Home page:



Out of the box, your Home page includes several applications such as Activities, Suggestions, and Calendar, but as with all applications in Cisco WebEx Social, you can remove those by hovering in the upper right corner of the application, then clicking the gear icon  and selecting **Remove**.

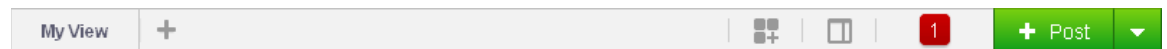
Global Navigation Bar

After you sign in, you see the global navigation bar at the top of the page. This area is always present no matter where you are in Cisco WebEx Social, and is divided into two sections.







The upper section includes the following, from left to right:

- Your photo and name. Clicking either of these items opens your profile page.
- Profile menu. Clicking the down-arrow icon next to your name allows you to set your availability, edit your account settings, edit your profile or sign out.
- Availability indicator. Displays your availability as selected from the drop-down menu.
- Main pages:
 - **Home**—This page is private and only you can see it. You can add additional applications on the page, and organize it however you wish.
 - **My Library**—This repository can be used to store your posts, videos, documents, and images.
 - **People**—This page provides you with several ways to search for, locate, and contact others.
 - **Communities**—This page provides you with several ways to search for, locate, join and create communities.
- A **Search** button that allows you to search all of Cisco WebEx Social for content matching your search terms. (See [Search](#), page 28.)



The section below enables you to easily manage and navigate to different subpages, control the page layout and content, view notifications, and create posts or updates.

It contains the following elements, from left to right:

- **Subpages**—Subpages allow you to organize your applications. You see a button (tab) for each subpage you have created. You can add subpages by clicking the  icon on the right.
- **Add Application** —Choose from the rich palette of application to add to your pages or communities.
- **Change Layout** —Select from several layout options for your pages. Each page can have its own layout.
- **Notifications** —Reveals a dialog box that displays alerts or announcements from the system administrator. It also displays invitations to join a community and community membership requests.
- A **+ Post** button that enables you to create posts in which you can add text, videos, images, links, and files, and then share them with people, groups, and communities. The drop-down menu allows you to post an update or to start a post marked as Question.

The WebEx Social Dock

At the bottom of the page, you see the Cisco WebEx Social dock.



The number of icons on the dock depends on what features have been enabled in Cisco WebEx Social. Some of the following icons may not be available in your organization.



Activities Stream—This expandable window displays your activities, the activities of the people you are following, and the activities of the members of your communities. These activities are the same as the ones shown on the Home page.



Chat—This icon appears only when you are using the click-to-chat feature.



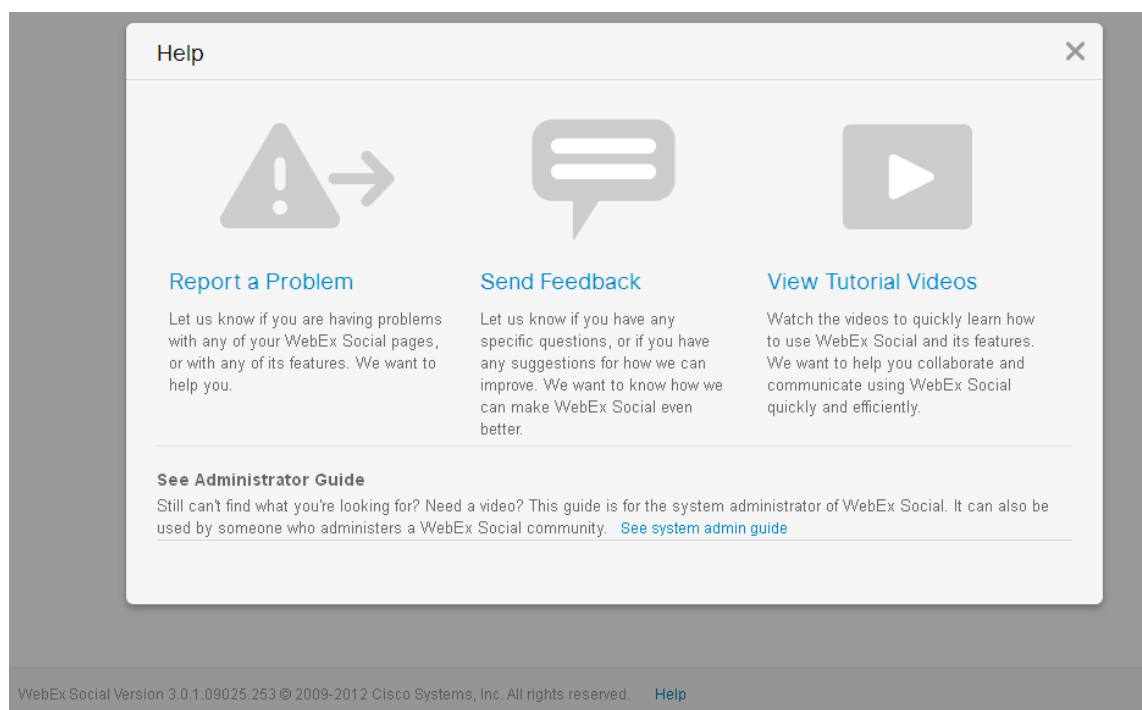
Contacts—This expandable window displays all of your contacts. The search box at the bottom allows you to search for people in your contacts list or your organization directory.



Calendar—This expandable window displays a calendar with your WebEx events. It also allows you to start WebEx Instant Meetings.

Getting Help or Providing Feedback

If you scroll down to the bottom of any Cisco WebEx Social page, you see a Help link next to the copyright text. Clicking it reveals a window that provides these support options:



- **Report a Problem**—Allows you to report a specific issue you have come across while using Cisco WebEx Social
- **Send Feedback**—Takes you to a web site your administrator has set up to allow you to offer feedback on your Cisco WebEx Social experience
- **View Tutorial Videos**—Takes you to a page where you can watch short tutorial videos on various Cisco WebEx Social features and concepts

Applications

There are a number of applications you can add to your Cisco WebEx Social pages. For information about how to add an application to a page, see [Add an Application, page 11](#).

Note that certain applications are available only for particular pages. For example, you cannot add Voice Messages, which displays your private information, to a public page, such as My Profile. In addition, some of these applications are by default already on a page, for example Streams is by default on the Home page.

The applications include:

- **Blog**—Allows you to add a blog and create blog entries
- **Calendar**—Allows you to place your Outlook or Lotus Notes calendar on the page
- **Community Calendar**—Allows you to place a community calendar on the page
- **Community Members**—Allows you to see the members of a community
- **Content Publisher**—Allows you to display web content on your page
- **Discussions**—Allows you to access your community discussions
- **Documents**—Allows you to access your document library and upload documents and create folders
- **IFrame**—Allows you to embed another web page within a frame
- **Images**—Allows you to access your image library and upload images and folders
- **Links**—Allows you to create links to content for quick retrieval
- **My Communities**—Allows you access your communities
- **OpenSocial App**—Allows you to add an OpenSocial gadget to your page
- **Post Library**—Allows you to display the posts of your library or a community library depending on where you add the application
- **Recently Viewed Documents**—Allows you to display the documents most recently accessed from the Document Library
- **RSS**—Allows you to set up and display RSS feeds
- **Streams**—Allows you to display your Activities and your Watch List
- **Suggestions**—Allows you to receive suggestions for people to follow, posts to view, and communities to join
- **Tag Cloud**—Allows you to navigate using frequently-used tags
- **Wiki**—Allows you to add a wiki

Availability Feature

The following sections provide information about the Availability feature in Cisco WebEx Social:

- [Sticky Availability Status, page 8](#)
- [Offline State, page 8](#)
- [Audio Notification for Incoming Chat Messages, page 8](#)

If you are running multiple instances of Cisco WebEx Social, you may want to also read the following topics in the [Appendix](#) to understand the multi-instance Cisco WebEx Social behavior:

- [Multi-Instance Behavior for Cisco WebEx Social Chat, page 35](#)

Sticky Availability Status

The availability status in Cisco WebEx Social is sticky, which means that all Cisco WebEx Social windows and tabs reflect the availability state that you set in the active Cisco WebEx Social window. For example, if you are in the Home tab and set your availability state to **Away**, the **Away** state appears if you go to the My Profile tab. In addition, if you close then reopen a Cisco WebEx Social window, the window shows the same availability state that was in the window when you closed it.

Offline State

When you select the Offline state, other users cannot send you a message nor can you send others a message or view anyone else's availability.

Offline state does not affect other clients that are used to sign in to your instant messaging/presence platform.



Audio Notification for Incoming Chat Messages

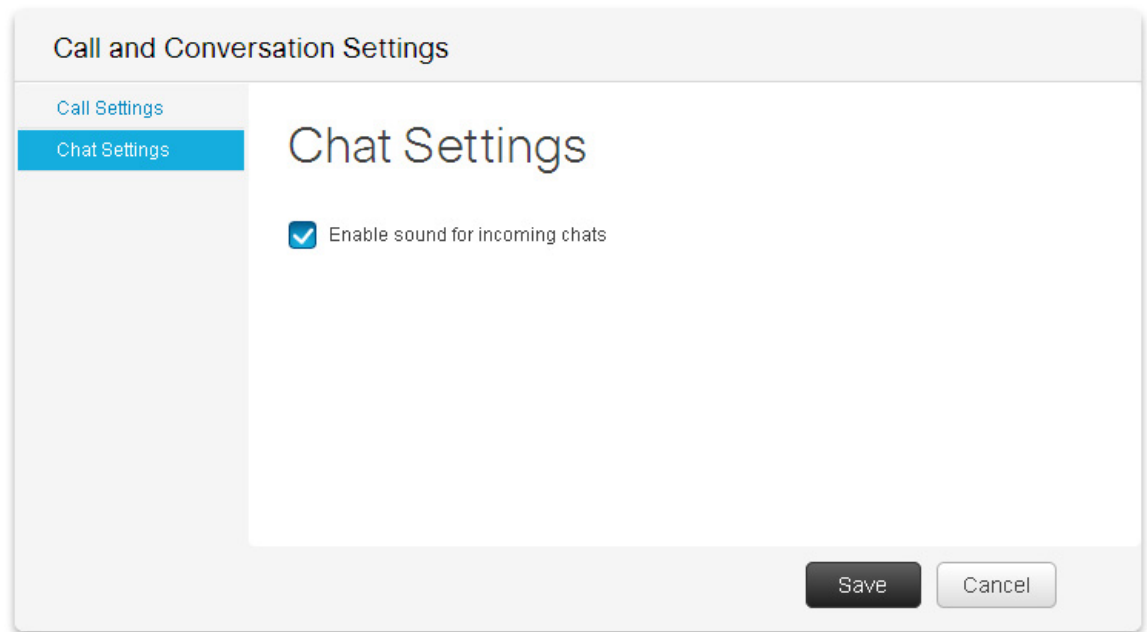
**Note**

This feature is available only if your System Administrator has enabled the integrated chat client.

Cisco WebEx Social provides a configurable audio notification for chat messages. If you enable this feature, you hear a sound when you receive a chat message.

To enable audio notification for chat messages, follow these steps:

1. From your Cisco WebEx Social window, click the Contacts icon  at the bottom of the screen.
2. In the My Contacts window, click the Settings icon  and select **Call and Conversation Settings**.
3. Click **Chat Settings**.
4. Check **Enable sound for incoming chats**.



5. Click **Save**.

Get Started with Cisco WebEx Social

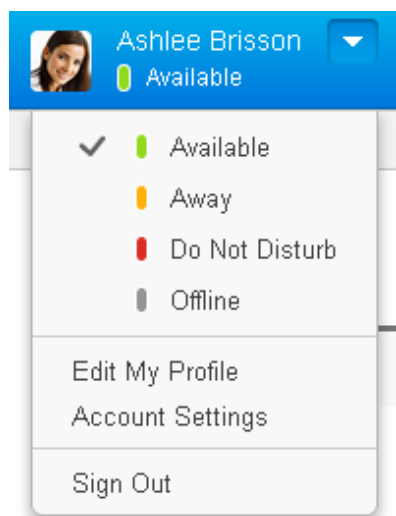
Use these suggested actions to get started, and to familiarize yourself with just a few of the Cisco WebEx Social features:

Suggested Actions	Go to...
1. Set your availability.	Availability, page 10
2. Post a personal update.	Updates, page 10
3. Customize your view.	Home, page 11
4. Personalize your profile.	My Profile, page 13
5. Search for and follow people, and create contact groups.	People, page 16
6. Join or create a community.	Communities, page 18
7. Create a post.	New Post, page 19
8. Ask a question.	Questions, page 21
9. Join or start a meeting.	Cisco WebEx, page 22
10. Start a chat session.	Click to Chat, page 24
11. Quickly start a one-on-one Cisco WebEx meeting.	Click to Meet, page 25

Suggested Actions	Go to...
12. Quickly create a private message	Click to Create a Private Post, page 25
13. Invite your contacts to Cisco WebEx Social	Invite a Person, page 26

Availability

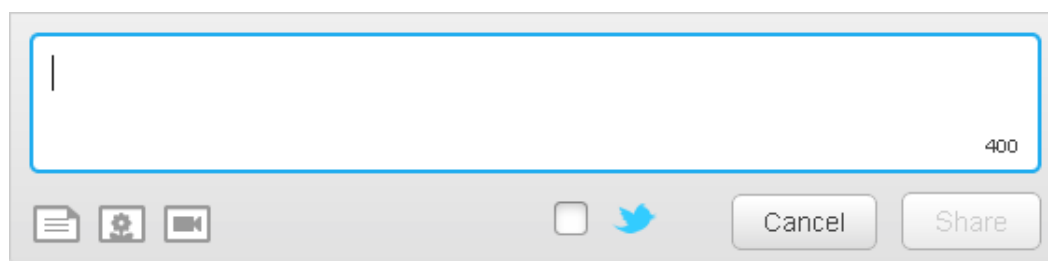
Let others know your availability through the course of your work day. Click the down-arrow icon next to your name, and select your current availability.



Updates

Post an update to let your followers or community comembers know about anything you want.

- Open the updates bubble. You can do this from various places:
 - From anywhere in Cisco Social, click the down-arrow icon next to +Post in the global navigation bar and select **Share an Update**.
 - In MyView, click in the edit box at the top of the Streams application.
 - On your Profile page, click in the edit box at the top of the Streams tab.



- Enter some text, and optionally do any of the following:

- a. Direct the update to a specific person by using an @ mention.

When you enter the @ symbol followed by a person name, the update displays in the Watch List of that person and in their Shared-with-Me filtered view in addition to the Activities feed of all of your followers or community comembers.

- b. Include a hashtag (#) to tag your update. Including a hashtag is just like tagging any other content in Cisco WebEx Social and is used to unite your message around a particular topic.

When you enter the # symbol followed by a keyword (for example #video), anyone can click the keyword in your update and get search results for other updates and content related to that keyword.

- c. Click one of these icons    to attach a document, image, or video

- d. If Twitter is enabled by your System Administrator, then you can also post your update to Twitter by checking the box next to the bird icon. However, a pop-up window first opens where you need to enter your Twitter username and password to authorize Cisco WebEx Social to use your Twitter account.


Note

If you are posting to Twitter you cannot add an attachment, and you are limited to 140 characters.

3. Click **Share**.

Home

Home is a private page that only you can see. By default it comes with these applications:

- Streams—Provides these switchable tabs:
 - Activity Stream—Allows you to discover and be aware of what the people you are following and the members of your communities are doing by viewing their activities
 - Watch List—Enables you to manage content that is important to you and on which you want to focus
- Calendar—Allows you to place your Outlook or Lotus Notes calendar on the page. Your WebEx meetings also appear on the calendar and you are able to start or join them with a single click.
- Suggestions—Gives you suggestions for people to follow, posts to view, and communities to join.

These are steps you can take to get started customizing your page:

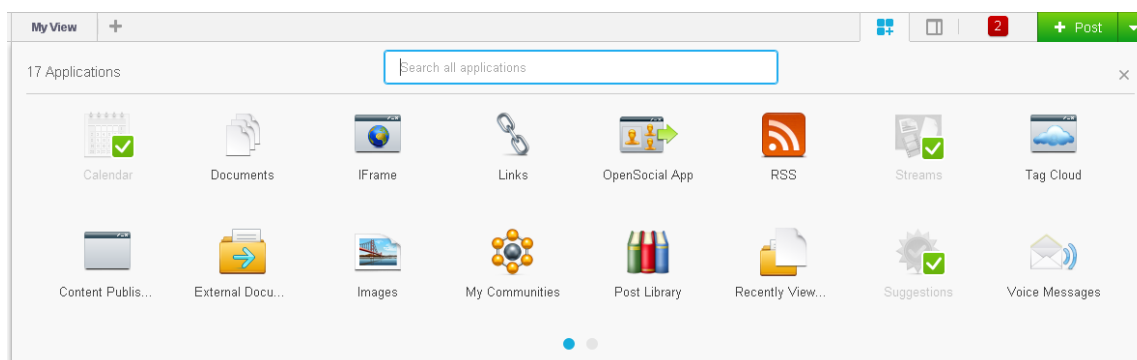
- [Add an Application, page 11](#)
- [Change Your Page Layout, page 12](#)

Add an Application

Take these steps:

1. Click the Add Application  icon.

A window with all the available applications opens.



Only the valid applications for the page you are on are displayed. Applications that are already in use on the page are dimmed and have a green check.

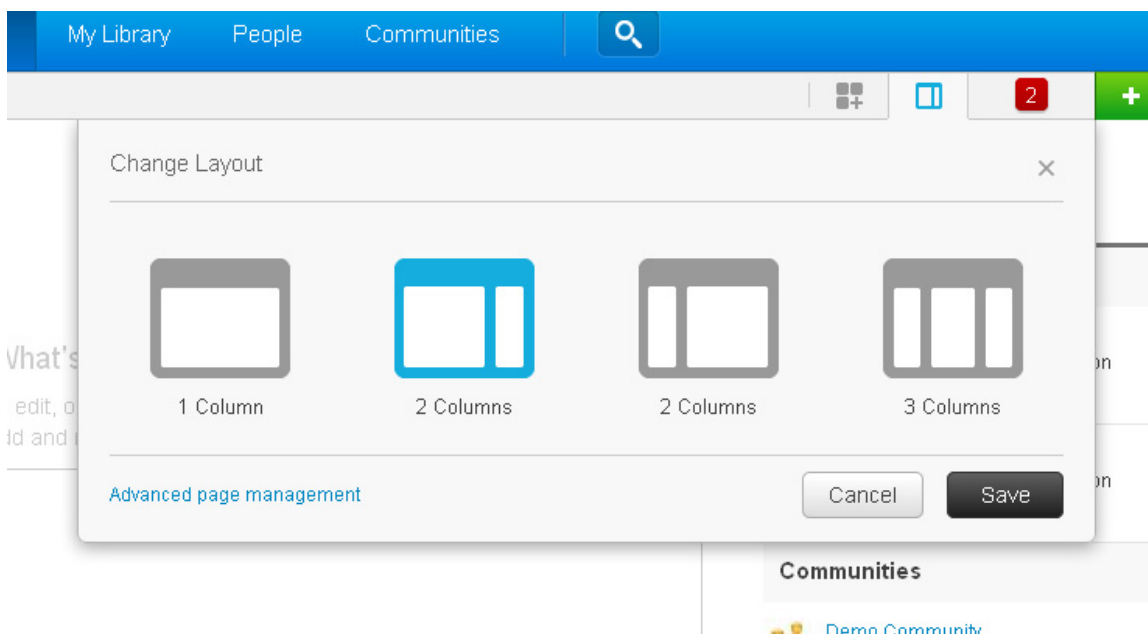
2. Select the application you want to add, then drag and drop it where you want it on the page. (For more information about the applications, see [Applications, page 7](#).)

Change Your Page Layout

Take these steps:

1. Click the **Change Layout** icon in the global navigation bar.
2. When the dialog box opens, select the layout you want, then click **Save**.

There are 1-, 2-, or 3-column layouts with varying widths. Note that some applications are restricted to certain column widths.



My Profile

My Profile is a public page about you that everyone can see. It comes with a default set of applications spread around these four tabs:

- **Activities**—The major part of this tab is taken by a stream displaying activities you generate. Activities is a great place for users who are not following you to see what you have been up to. In addition, this tab shows your connections and communities.
- **Featured Content**—This tab shows a selection of posts you chose to share on your profile and documents you upload to the library. See [New Post, page 19](#) to learn how to add posts to this tab. This page is the only place in My Profile that you can customize with applications or content.
- **About**—Use this place to introduce yourself to other Cisco WebEx Social users. Tell them what you are doing, what your expertise and interests are, how to contact you and of what your communities are.
- **Reporting Structure**—Displays your reporting structure.

Above the tab bar you see fixed information about yourself including name and photo, job title and organization name.

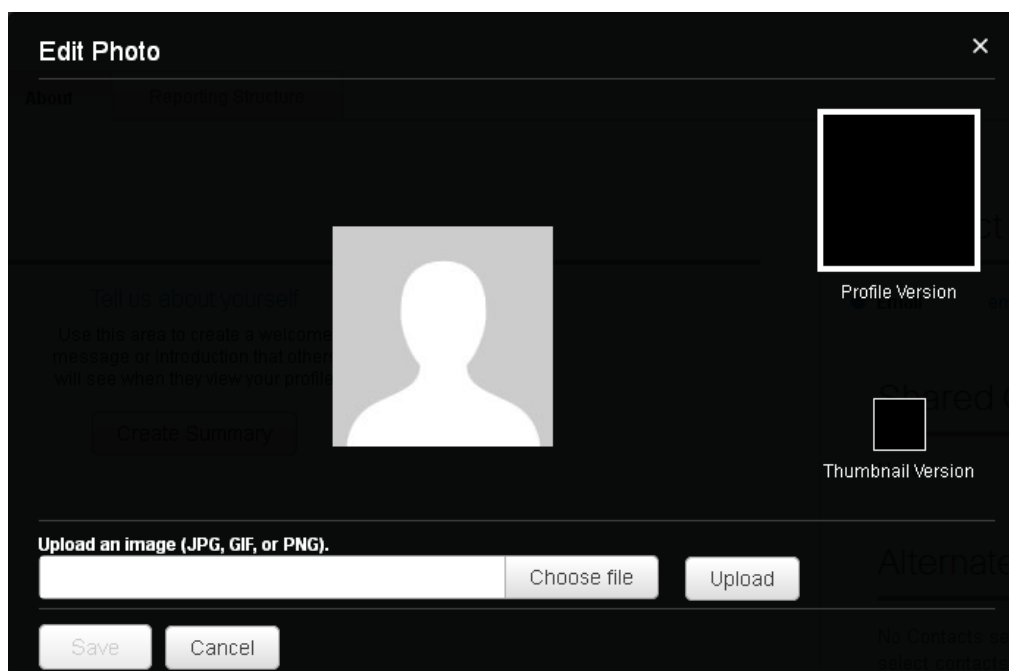
These are steps you can take to get started customizing your profile:

- [Add Your Photo, page 13](#)
- [Set Your Contact Information and Enter Your Interests, page 14](#)

Add Your Photo

Take these steps:

1. Click your name in the global navigation bar.
Your profile opens.
2. Click **Edit Photo**.
The Edit Photo dialog box opens.



3. Click **Choose file** to locate and select a photo on your local drive.
4. Click **Upload**.
5. Crop your photo, and preview how it will look on your profile and on the thumbnail on your contact card.
6. Click **Save**.

Set Your Contact Information and Enter Your Interests

Take these steps:

1. Click your name in the global navigation bar.
Your profile opens.
2. Click the Edit button next to your name.
3. In the text box under your availability, enter a different job title to display if yours is not descriptive or user friendly.
4. Make sure your default time zone is set correctly.

You can also change the time zone if you are travelling, for example, and are in a different time zone.



5. Specify your work hours.
6. Select your preferred method for others to contact you.
7. Click **Add another email address, phone number, or IM**, select the method from the drop-down list, then enter the associated number, email address, or IM name.

Contact Info

Work Hours:

8:00 AM - 5:00 PM

☒ **Email** emmajones@example.com

☐ **Mobile**

+ Add another email address, phone number, or IM

Mobile

Work

Email

IM AIM

IM JABBER

IM MSN

IM SKYPE

IM ICQ

IM YM

8. After you have joined or created communities, and made contacts, you may want to come back to your profile and customize your **Public Communities** and **Alternate Contacts**.
9. Enter your expertise and interests:
 - a. In the Expertise field, enter your areas of expertise. These areas allow users to suggest you as an expert when creating a post.
 - b. In the Interests field, enter professional or personal interests.

Expertise:

documentation ×
web publisher ×
framemaker ×
×

Interests:

gardening ×
travel ×
hikin|
×

hiking
hiking and biking
Create new tag for hikin

**Note**

The Expertise and Interest tags you enter on your profile can be clicked to initiate a search for other people, communities, and content that is related to that tag.

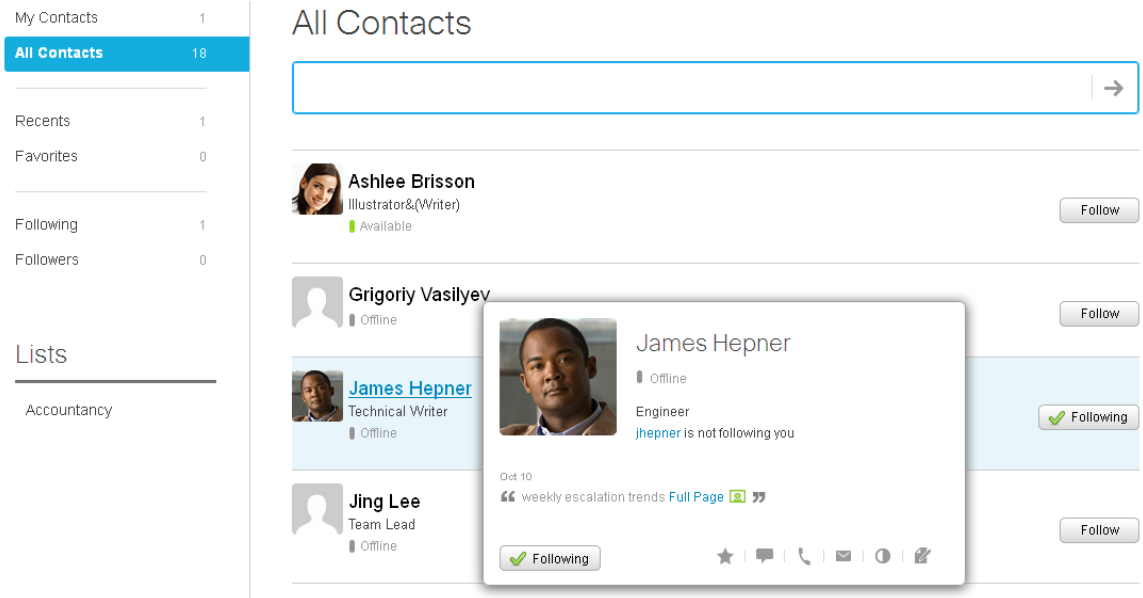
10. Click **Save**.

People

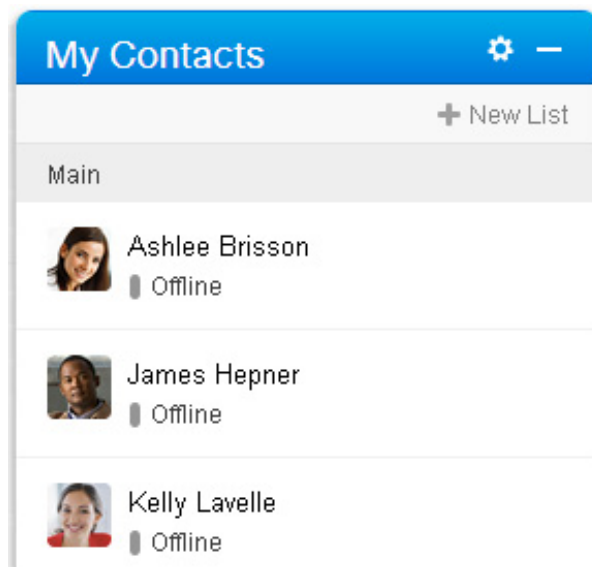
People is a page where you can search for and get in touch with people, and you can choose to follow them.

These are steps you can take to get started:

1. Select **People** in the global navigation bar.
2. Search for others in one of these ways:
 - Enter a complete or partial name in the Search box. You can even search by expertise.
 - Use the page buttons at the bottom to go through the listings page by page.
 - Narrow down the listings by clicking the predefined filters such as My Contacts, Recent, or Followers.
 - View contacts you organized into Lists.
3. When you locate someone, you can:
 - Hover over their name to see their contact details.
 - Click the name of the person to go to their profile page.



4. Contact the person using the action buttons on their contact card or profile page. (See [Click to Chat](#), page 24, [Click to Meet](#), page 25, [Click to Create a Private Post](#), page 25.)
5. Start following the person by clicking on their hover card or profile page.
When you follow someone, they appear in the Contacts list when you click the Contacts icon at the bottom of the page.
6. Invite the person to join Cisco WebEx Social by clicking on their hover card or profile page.
You can read more about it in [Invite a Person](#).



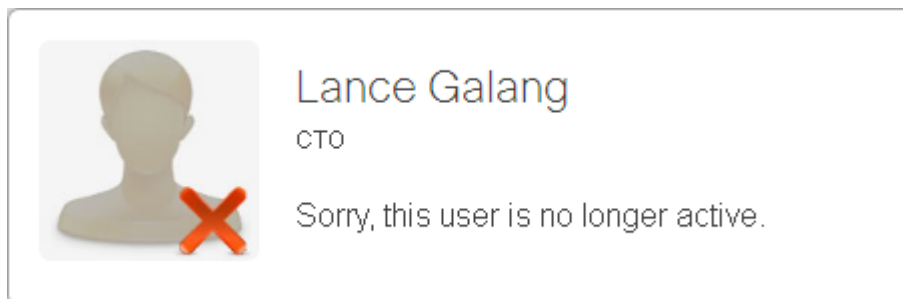
By default, all your contacts appear in the Main list. Lists are useful for sharing content. For example, if you share posts with a set group of people regularly, you can create a contact list, add those people to the list and then use the list name to share a post with that contact group instead of having to add them individually. You can create your own lists of contacts as follows:

- a. Click **+New List** at the top of My Contacts.
- b. In the List Name field, enter a name for the list.
- c. Optionally, start adding people to the list right away. Start typing a name in the Add People box and the search-as-you-type feature suggests you names from the directory.
- d. Click **Save**.
- e. Add more people to the list by drag and dropping contacts from the Main list into your new list.

Inactive Users

Your System Administrator can mark users as inactive when appropriate, such as when a full-time employee leaves the company or takes a long leave, among other cases. This way you and other Cisco WebEx Social users can know that these people are no longer reachable through Cisco WebEx Social.

Inactive users do not appear in People searches or in your “You are following” or “Your followers” lists, but still display when you select users in the Share with dialog, or in communities to which they belong. If you, however, hover to view their contact card or click to view their Profile, you are presented with a dialog box similar to the following:



Communities

Communities are where people with shared interests or goals come together to collaborate and communicate. You can join an existing community or create a new one.

There are three types of communities:

- **Open**—These are communities that anyone can join, and content in this type of community displays in search results for all Cisco WebEx Social users.
- **Restricted**—These are communities for which you must request and be granted membership to join, and public content in this type of community displays in search results for all Cisco WebEx Social users, but they must be granted access to the Community before they can view that content.
- **Hidden**—These are communities that you can join by invitation only. They are not displayed on the Communities page, and content in this type of community shows up in search results but only for members of that hidden community.

These are steps you can take to get started:

1. Select **Communities** in the global navigation bar.
2. Search for an existing community to Join in one of these ways:
 - Enter a complete or partial name in the Search box
 - Use the page buttons at the bottom to go through the listings page by page
 - Narrow down the listings by clicking the predefined filters such as Communities I'm Member of or Recent Communities
 - Filter by category


The screenshot displays the 'All Communities' interface. On the left sidebar, the 'All Communities' tab is active, showing 11 communities. Below it, 'Recent Communities' and 'Favorite Communities' are listed with 1 and 0 items respectively. The 'Categories' section lists 'General' (11), 'Project Community' (10), and 'Product Community' (10). The main area shows a list of communities with columns for Name, Category, Members, and Type. The listed communities are: 'Administration' (General, 2 members, Open), 'Cisco Quad Training Co...' (General, 4 members, Open), 'Demo Community' (General, 3 members, Open), 'Development' (General, 2 members, Open), and 'Financial Community' (General, 2 members, Open). Each entry has a 'Join' button. At the bottom right, there are icons for a list, calendar, and user profile.

3. When the community name displays, click the Join button to the right of the community type.
 - If it is an Open community, you are joined right away.
 - If it is a Restricted community, there is a padlock icon on the Join button and clicking the button **requests you membership**. The button label changes to Pending to show that you have already requested membership.
 - Hidden communities do not display in the list. Joining a hidden community is by invitation only.
4. To create a community, click **New Community**, and follow the step-by-step instructions.

New Post


Create a new post to share text content, images, video, or other files with your communities, contacts, or groups of contacts.

These are steps you can take to get started:

1. Click  in the global navigation bar.

The Post page displays.



2. Enter a title for your post (“Enter your title here”).
3. Click in the text box below (“Enter names of recipients...””) to enter people or communities with whom you want to share the post, or click the Browse My Connections icon  to select people, lists, or communities. You can leave this field empty if you want to keep the post private or if you are making it Public.
4. Select one of the following:
 - **Public**—To allow anyone to search for, view, and comment on your post. You can also check Show on my profile to publish to the Featured Content tab on your profile.




By default, everyone is allowed to view, comment on, and share the content. However, you can change the default permissions by checking or unchecking the desired permissions.

- **Restricted**—To allow only the contacts you designate to view your post, and to ensure it does not display in search results.

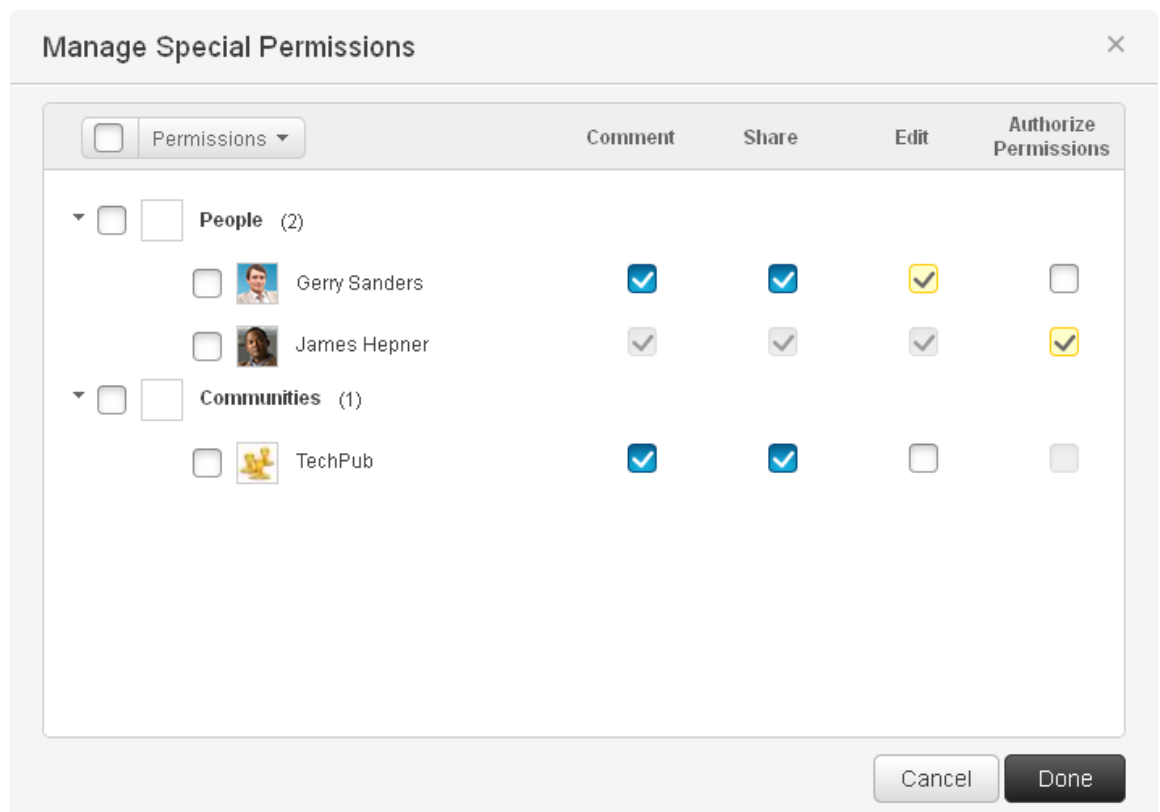


By default, the names you enter are allowed only to view, comment, and share the content. However, you can change the default permissions by checking or unchecking the desired permissions.

5. Manage special permissions.

If you want to allow different permissions to different people or groups of people, click Manage Special Permissions . You have to enter at least one recipient to activate this button.

In the Manage Special Permissions dialog box, you can either check to change the permissions for all recipients, for types of recipients, or for selected individuals, then click **Permissions**, and select or deselect the desired permissions. You can also check or uncheck individual permissions for individual recipients.



6. Enter your text. You can also:
 - Expand to a full page by clicking the expand page icon
 - Access additional formatting options by clicking the expand toolbar icon
 - Add a link to a post or a URL by clicking the link icon
 - Add an image by clicking the image icon
7. Click **+ File** or **+ Link** to attach files and links to the post.
8. Click **+ Category** to provide a title under which you can group your links or files by using drag and drop.
9. Add tags, which make it easy to search for the post later.
10. Optionally, click **Preview** to see what your post looks like.
11. Click **Preview** to view what your post looks like when published, or click **Post** to publish.
The post by default displays in your Watch List, and is stored in your Library.

Questions

Asking a question allows you to connect to experts in your organization and solicit their responses. To ask a question:

- Click the down-arrow icon next to the +Post button in the global navigation bar and select Ask a Question

- Start a post in any way you like and then click the Mark as Question check box at the top
- Marking a post as question enables the Suggest Experts button in the Tags box. To add experts:
1. After you have completed your message, add one or more tags.
 2. Click the Suggest Experts button.
A list of Cisco WebEx Social users who have any of the tags as expertise display.
 3. In the Suggested Experts dialog box that opens, select as many experts as you like.
 4. Click Add.
The selected experts are automatically added as recipients.
 5. Click Post.

Cisco WebEx



Note

This feature is available only if your organization uses Cisco WebEx Meetings.

Cisco WebEx allows you to join scheduled meetings or to create an instant meeting. Your WebEx meetings appear in the Calendar application next to your Outlook or Lotus Notes meetings although you can choose to only integrate your WebEx calendar.

Before you Begin

Before you can use this feature, you must set up your account:

1. Click your profile menu and select **Account Settings**.
2. Click **Calendar and WebEx Login**.
3. Check **Connect to WebEx**.
4. Select a **WebEx Site**. If you do not know which server to select, see your System Administrator for assistance.
5. Enter your **Username** and **Password** (if required).

Cisco WebEx

Connecting to WebEx synchronizes your WebEx calendar to this app and allows starting instant meetings

☒ Connect to WebEx

* Required Fields

WebEx Site * ▼

Username *

Password *

Identification

[Social Network](#)

Miscellaneous

[Display Settings](#)

[Custom Attributes](#)

[Phone control preference](#)


[CMIS Settings](#)

[Chat Password](#)

6. (Optional) If you want to enable One-Click meetings, click WebEx Instant Meetings and set up the available options.
7. Click **Save**.


Scheduled Meetings


To join a meeting you have been invited to, or to start your own meeting, follow these steps:

1. Click the Calendar icon  in the Cisco WebEx Social dock or display the Calendar application on a page.
2. Click the meeting you want to attend. WebEx meetings have the WebEx logo next to them.

6:00 PM
7:00 PM

Weekly Doc Team Sync-up

 WebEx




Start

It opens to display the meeting details.

3. Click **Join or Start**.

Create an Instant Meeting

To create an instant WebEx meeting from inside Cisco WebEx Social:

1. Click the Calendar icon  in the Cisco WebEx Social dock or display the Calendar application on a page.
2. Click **Meet Now**.
The meeting window opens.
3. Use the options provided on the screen to give a topic to your meeting and to invite others.



Note

You can invite people either inside or outside your organization by using their email address, but auto-complete only happens for users who are inside your organization.

4. Click **Start**.

Meet with a Particular Person

Cisco WebEx Social also allows you to quickly start a meeting with a particular user. This feature is detailed in [Click to Meet, page 25](#).

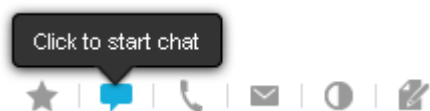
Click to Chat

The click-to-chat feature allows you to quickly and easily start a chat session with anyone in Cisco WebEx Social with just one click. It is available anywhere you see the chat icon, including the contact card of the person and their profile.

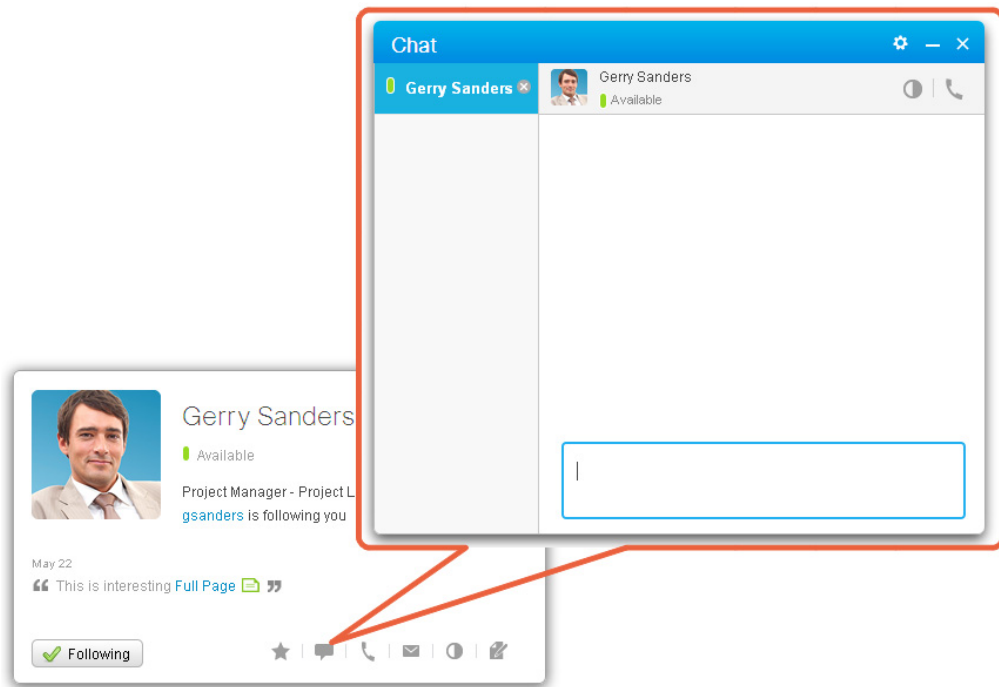
Before you Begin

Before you can use this feature, you may need to provide your chat password. Click your profile menu, select **Account Settings > Chat Password** and enter your Username and Password. If you do not know your password, see your System Administrator for assistance.

1. Click the chat icon.



The chat window opens.



2. Enter your message, then press **Enter** to send.

Click to Meet

The click-to-meet feature allows you to quickly and easily start an instant WebEx meeting with anyone on Cisco WebEx Social with just one click.

To start an Instant Meeting with a Cisco WebEx Social user, locate the meeting icon on the contact card of the person or on their profile and click it.



An instant meeting is created.

Click to Create a Private Post

“Click to post” is the easiest and quickest way to send someone a private message in Cisco WebEx Social.



Clicking this button from a contact card, profile page, or information pane in the Calendar application starts a new post shared with the respective person. In addition, clicking the +Post button when viewing the profile page of the person gives you the same result.

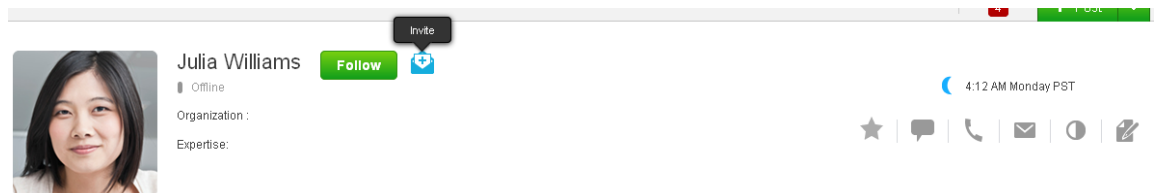
The post does not differ in any way from a normal post but the following is completed for you:

- The name of the person is preselected as a recipient
- The privacy level is set to Restricted
- The name of the person is preselected to receive an email notification in the “Send an email message” drop-down list


Being a normal restricted post, it appears in your Watch Lists and the Watch Lists of your recipient but not in anyone’s Activities streams.

Invite a Person

You can invite colleagues who have not yet signed in to Cisco WebEx Social to join. It is easy to identify them by the  icon next to their names in contact cards, search results, their profile pages, the People page, or the Reporting Structure page.



To invite a person:

1. Click .
2. Type in your invitation message or keep the default.

Invite Julia to Join You

Invite Julia by sending an e-mail

Message:

I have invited you to log into Quad so you can communicate and collaborate with your colleagues.

Looking forward to seeing you,

☒ Automatically start following Julia

Cancel Send

3. Check **Automatically start following ...** to make sure the person is added to your contact list as soon as he or she signs in to Cisco WebEx Social.
4. Finally, click **Send**.

You and everyone who invited the person sees a notification when the person accepts the invitation. He or she automatically starts following you.

What and When to Post

The following are some best practices for posting information on Cisco WebEx Social:

- **Post**—Use a post to share text, videos, images, links, and files with people, groups, and communities. The post is a versatile tool that can be shared not only across multiple communities at the same time, but also with people who are not members of those communities. You can set the post permissions any way you want to allow or disallow people to view, comment, share, edit or even authorize permissions.

The Post is the recommended way of creating content in Cisco WebEx Social. By altering the permissions and the place where it is posted, the Post can be used as a Wiki, Blog, or Discussion.
- **Update**—Use an update to quickly and easily update your followers about anything you want, and optionally add a video, image, or document as well. Others cannot edit or share the information in your update, but they can comment on it. All Updates are public.
- **Blog**—In communities, use a blog to post commentary, descriptions of events, or other information of interest to community members. Others can comment on the content, and if given permission, can also edit the content. Note however that blogs cannot be shared across communities or individuals.
- **Content Publisher**—Use the content publisher application to create and display Web content on one of your pages (a personal public page, such as My Profile, or a community page if you are a community owner/administrator), or on a private page, such as Home. Web content is most suitable for static or infrequently-changing content because it does not generate activities. Others cannot share or comment on the content, but in the case of communities, other community owners/administrators can edit the content. Note also that Web content cannot be shared across communities or individuals.

- **Discussion**—Use a discussion to pose a question or start an exchange within a community. Community members can reply to it and start their own discussions.
- **Wiki**—Use a wiki when you want to collaborate with others, particularly within a community setting, by creating and editing one or more interlinked posts in a hierarchical structure. Others can create, edit, share, and comment on the content.

Search

This section is organized as follows:

- [Search Options, page 28](#)

Search Options

The Search feature in Cisco WebEx Social enables you to search for full or partial words and names. It also allows you to enter two or more words at a time, and by default, the results include all instances of the words except for stop words.

Stop words are words that have little relevance to the search such as functional words. Stop words are left out of the search unless you specifically search by Exact Phrase (see below).

The search results page enables you to view, filter, and sort the information in a number of different ways, such as by relevance, scope, content type, and date. In addition to those options, there are a number of advanced methods you can use to refine your searches. They are:

- **Exact Phrase**—Use this method to find an exact match of a phrase by delimiting it with double quotes (“”). Searching by exact phrase prevents Search from stripping stop words. The phrase cannot include double quotes. For example, to search for the phrase *enterprise collaboration* enter: `"enterprise collaboration"`.
- **Wildcards**—Use this method to represent either a single character or multiple characters.
 - Single character—A question mark (?) is used to represent a single character in a word. For example, to search for “tide”, “tire”, or “time” enter: `ti?e`.
 - Multiple characters—An asterisk (*) is used to represent multiple characters in a word. For example, to search for “testing” or “tester”, enter: `test*`

You can use wildcards in the middle of a word, but you cannot use them to represent the first character of a word.

- **Boolean Operators**— Use this method to limit, widen, or define your search by combining words and phrases using uppercase AND, OR, NOT, and the plus sign (+) and minus sign(-).
 - AND Operator—This operator narrows a search by combining terms. For example, to search for *collaboration* and *Cisco*, enter: `collaboration AND cisco`. This operator is the default so you do not need to add it explicitly.
You can also use double ampersands (&&) in place of the word AND.
 - OR Operator—This operator broadens a search to include results that contain any of the terms you enter. It is a good tool to use when there are several common spellings or synonyms of a word. For example, to search for *colleague* and *cowoker* enter: `colleague OR cowoker`.

You can also use double vertical bars (||) in place of the word OR.

- **NOT Operator**—This operator narrows a search by excluding certain search terms. NOT retrieves information that contains one, but not the other, of the search terms you enter. For example, to find the word *cisco*, but not the word *enterprise collaboration*, enter: **cisco NOT enterprise collaboration**.

You can also use an exclamation mark (!) in place of the word NOT.

- **+ Operator**—This operator limits the search by specifying that the term following the plus (+) sign is required. For example, to search for information that must contain the word *webex* and may contain the word *social*, enter: **+webex social**.
- **- Operator**—This operator excludes information from the search that contains the term following minus (-) sign. For example, to search for information that contains the words *webex* but not *social*, enter: **webex -social**
- **Proximity**—Use this method to find words within a specific distance of each other by using a tilde(~) and a number value. For example, to search for *webex* and *social* within 10 words of each other, enter: **"webex social"~10**

Make sure the value you enter for the distance between the number of words is at least 1.

- **Fuzzy**—Use this method to find words that match a pattern approximately (rather than exactly) by using a tilde (~) at the end of the word. For example, to search for words with a spelling similar to the word *roam*, such as *road* or *roar*, enter: **roam~**.

An additional, optional, parameter, with a value between 0 and 1 (excluding 1), can be used to specify the required similarity. The closer the value is to 1, the more similar the terms have to match. For example, to search for words with a spelling very similar to *roam*, enter: **roam~0.8**.

When no parameter is entered, the default is 0.5.

- **Field**—Use this method to find field names, which are case sensitive. These are the field names you can search for:
 - **Title**—This field searches for the title of a document (post, blog, document, and so on). For example, to search for a document with the title *cisco collaboration*, enter: **title: "cisco collaboration"**
 - **Content**—This field searches for content in a document. For example, to search for *Release 2.5* anywhere in the body of a document, enter: **content:Release 2.5**.
 - **Created**—This field searches for the document creation date using the following format: YYYYMMDD. For example, to search for a document created on July 9, 2011, enter: **20110709**.
 - **Modified**—This field searches for the document modification date using the following format: YYYYMMDD. For example, to search for a document modified on July 20, 2011, enter: **20110720**.
 - **PortletType**—This field searches for the following content and information types:

Blogs	Media Galleries
Bookmarks	Message Boards
Community Calendar	People
Comments	Posts
Communities	Post Attachments

Document Libraries

Web Content

Image Galleries

Wikis

- **userName**—This field searches for the full name of the author of a document.
- **tag and tags Context**—These fields search for a document tag or a user tag.
- **firstName**—This field searches for a user first name.
- **middleName**—This field searches for a user middle name.
- **lastName**—This field searches for a user last name.
- **fullName**—This field searches for a user full name.
- **expertise**—This field searches for a user expertise.
- **emailAddress**—This field searches for a user email address.
- **jobTitle**—This field searches for a user job title.
- **screenName**—This field searches for a user sign-in name.
- **communityName**—This field searches for a community name.
- **fileType**—This field searches for attachments with these file types:

arf	mov	sql
avi	mp3	tiff
bmp	mp4	txt
doc	mpg	wav
docx	oft	wmv
flv	out	xls
gif	pdf	xlsx
htm	png	zip
ini	ppt	
jpg	pptx	

- **Range**—Use this method to find a match in documents whose field values are between the lower and upper bound specified in square brackets and separated by the word TO ([]). For example, to search for all documents created between Jan 2011 and July 2011 (inclusive), enter:

created:[201101* TO 201107*]

And to search for all users whose names are alphabetically between Justin and Sam, including Justin and Sam, enter: **firstName:[Justin TO Sam]**

- **Grouping**—Use this method to create subgroups using parentheses (). For example, using Boolean operators to search for either *webex* or *social* and *cisco*, enter: **(webex OR social) AND cisco**

And to search for titles using Boolean operators with either *webex* or *social* and *cisco*, enter:

(title:webex OR title:social) AND title:cisco

- **Boosting**—Use this method to find a match in documents based on the relevance of a word by using a caret (^) following the word, and entering value for the boost factor. The higher the boost factor, the more relevant the term is. For example, if you are searching for *webex social*, and want your search results to provide documents where the word *social* is most relevant, enter: **webex social^8**

By default, the boost factor is 1. The boost factor must be positive number, and it can be less than 1 (for example, 0.2).

- **Special Characters**—Use this method to search for these special characters using a backslash (\) preceding the character: plus sign (+), minus sign (-), double ampersands (&&), double vertical bars (||), exclamation mark (!), parentheses (), curly brackets { }, square brackets [], ampersand (&), quotation marks (“), tilde (~), asterisk (*), question mark (?), colon (:), and backslash (\). For example, to search for *cisco:test*, enter: `cisco\:test`

Content Visibility in Cisco WebEx Social

Cisco WebEx Social provides visibility of and access to content based on community type and the actions that are performed within communities.

[Table 1](#) describes how activities and search results appear for content in the three Cisco WebEx Social community types.

Table 1 *Content Visibility for Cisco WebEx Social Community Types*

Community Type	Users Who can See Activities	Users Who can See Search Results
Open	Active users.	Active users.
Restricted	All members of the Restricted Community.	Active users can see the title of the content, keywords, and related text. Users who have been granted access to the Restricted Community can see the complete content.
Hidden	All members of the Hidden Community.	All members of the Hidden Community.

Table 2 describes which users can perform various actions for the content types within communities.

Table 2 **Actions that Users can Perform on Community Content Types**

Content Type	Actions and Who can Perform Them				
	Create Content	View or Download Content	Edit Content ¹	See Activities	See Search Results
Post shared with users.	Author of the post.	Users who have View permission for the post.	Users who have Edit permission for the post.	For public posts: users who are following the author of the post and who the post is shared with. For posts that are posted as Featured Content: users who are following the author of the post and who the post is shared with, and any user who visits the profile. For private posts: do not appear in activities.	For public posts: all active users. For private posts: Users that the post is shared with.
Post shared with communities.	All members of the community.	Community members who have View permission for the post.	Community members who have Edit permission for the post.	Same as for Post shared with users . Note: private posts cannot be shared with Public communities. In addition, members of the community see activities in their activity streams and in the activity stream of the community home page.	For public posts: all active users. For private posts: Users that the post is shared with.
Community Blog.	Owners and administrators of the community.	All members of a community.	Owners and administrators of the community.	See Table 1 .	See Table 1 .
Document folder or image folder.	Owners and administrators of the community.	All members of a community.	Owners and administrators of the community.	Not applicable: no activities are sent when a folder is created or modified.	Not applicable: folders do not appear in searches.

Table 2 **Actions that Users can Perform on Community Content Types (continued)**

Content Type	Actions and Who can Perform Them				
	Create Content	View or Download Content	Edit Content ¹	See Activities	See Search Results
Document or image.	All members of the community.	All members of the community.	User who originally uploaded the document or image, and owners and administrators of the community.	See Table 1 .	See Table 1 .
Wiki application.	Owners and administrators of the community can create the application.	All members of the community.	Owners and administrators of the community can configure settings of the application.	See Table 1 .	Not applicable: wiki applications do not appear in searches.
Root post of a wiki application ² .	Owners and administrators of the community can change the content.	All members of the community.	Any member of the community can edit default content. After content is changed, normal permissions for the post determine who can edit.	See Table 1 .	See Table 1 .
Child post of a wiki application.	All members of the community.	All members of the community.	All members of the community.	See Table 1 .	See Table 1 .
Update	Active users.	Active users.	Author of the update. Updates cannot be deleted.	Users who are following the author of the update.	Active users.
Directed update (using an @ Mention)	Active users.	Active users.	Author of the update.	Users who are following the author of the update and users who are cited in the @ Mention.	Active users.
User profile post.	Active users.	Active users.	Author of the post.	Users who are following the author of the profile post and users who are cited in the @ reply, and any user who visits the user profile post.	Active users.

Table 2 ***Actions that Users can Perform on Community Content Types (continued)***

Content Type	Actions and Who can Perform Them				
	Create Content	View or Download Content	Edit Content ¹	See Activities	See Search Results
Update to community (through Streams on Community Home page).	All members of the community.	All members of the community.	Author of the update.	See Table 1 .	See Table 1 .
Web content in My Profile.	Active users.	Active users.	Author of the content.	Not applicable: no notifications are generated.	Active users.
Web content in a community.	Owners and administrators of the community.	All members of the community.	Owners and administrators of the community.	Not applicable: no notifications are generated.	See Table 1 .
Discussions categories.	Owners and administrators of the community.	All members of a community.	Owners and administrators of the community.	Not applicable: no notifications are generated.	Not applicable: categories are not searchable.
Discussions.	All members of the community.	All members of the community.	Author of the discussion post, and the community owners and administrators can edit. In addition, owners and administrators of the community can move and delete threads and can ban users from participating in the community message board.	See Table 1 .	See Table 1 .

1. Users who can edit content also can restore previous versions of the content.

2. A default root post is created automatically when a wiki application is created.

Appendix

This chapter is organized as follows:

- [Multiple Chat Instances, page 34](#)
- [What is WebEx Social for Office?, page 35](#)

Multiple Chat Instances

- [Multi-Instance Behavior for Cisco WebEx Social Chat, page 35](#)

Multi-Instance Behavior for Cisco WebEx Social Chat

If User A sends a message to User B, who is signed in to multiple instances of chat (in Cisco WebEx Social or a thick client), User B receives the message in all instances. User B can send a reply to User A from any of these instances. The instance the User B uses for the reply becomes the only recipient for all subsequent messages that User A sends to User B in this chat session.

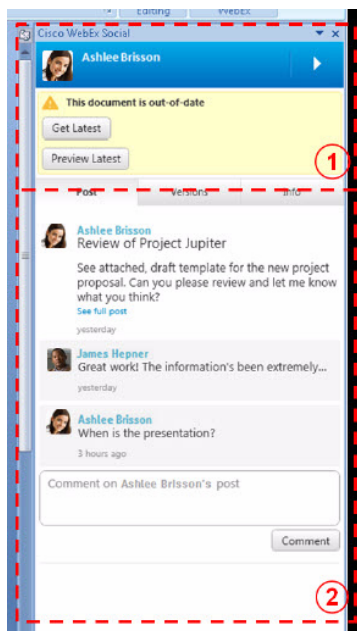
If User B replies to an earlier message from User A by using one of the other instances, User A receives the newest message from User B and subsequent replies from User A go to the instance User B is now using. User B can continue to switch instances in this way.

If User A closes the current session with user B and then starts a new session with User B, the new chat message broadcasts to all instances that User B is signed in to. The behavior then continues as described earlier in this section.

What is WebEx Social for Office?

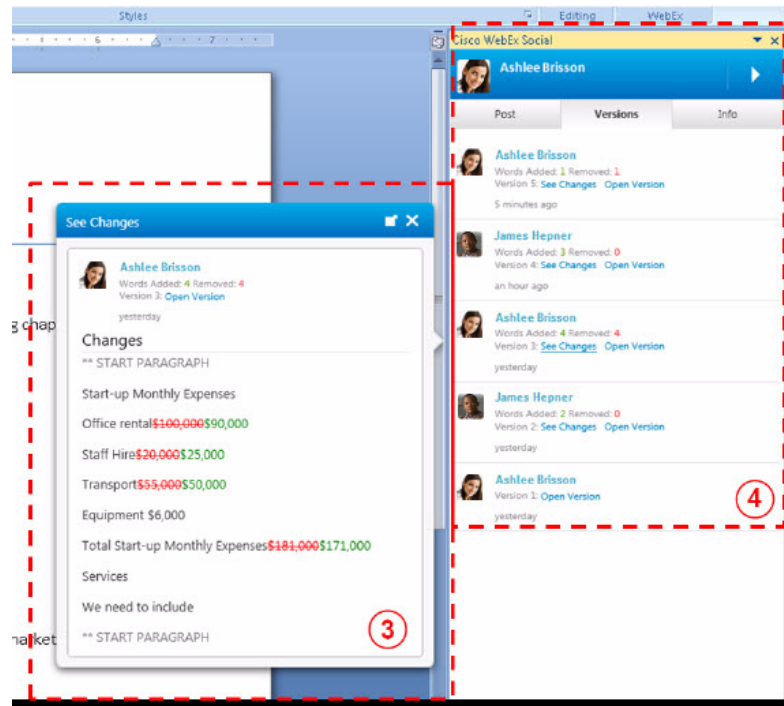
WebEx Social for Office allows users to collaborate on Microsoft Office documents (Word, Excel, and PowerPoint), which are attached to WebEx Social, by means of a dynamic WebEx for Office sidebar. When a document is edited users can attach the edited document as a new version to the original post with a single click. Users who open the document are notified that a new version is available. A dynamic sidebar is displayed within Microsoft Office with the following information:

- The Posts tab allows users to view the original post and any comments which have been made about it. Users are also able to add and monitor comments in near real time.
- The Versions tab shows the version history of the document and highlights the changes that have been made to it.
- The Information tab provides information on the post owner, contributors and who the post has been shared with.



1. Edit the latest version of shared documents.
2. View and comment on your Cisco WebEx Social posts in real time from your Microsoft Office application.

3. Track changes.
4. Version control.



5. Share changes with other users.



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