



Cisco WebEx Social Server: Getting Started Guide, Release 3.4

Cisco WebEx Social Server is a people-centric social collaboration platform that can help organizations accelerate decision making, problem resolution, and innovation by quickly and more securely connecting people to the resources and information they need to get work done. With it, 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 full-fidelity mobile access

A premises-based platform with an open and extensible architecture, WebEx Social Server lets you take full advantage of your existing real-time communications, content management, and line-of-business applications assets. WebEx Social Server is a core solution component of the Cisco Collaboration product portfolio.

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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](#)
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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. With Unified Communications integration, call, video call, instant message, or set up a Cisco WebEx meeting with a single click.
 - Manage and share documents
 - Work more efficiently by posting status messages and tagging information
 - Invite people who have not yet joined
 - Post to Cisco WebEx Social from Outlook or Lotus Notes
- Security
 - Roles-based policies for fine-grained access control
 - Extensive logging and recording

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- 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 Unified Communications, Cisco WebEx Connect Instant Messaging, Microsoft Office Communication Server (supported versions subject to change) for instant messaging, Cisco WebEx Meetings, Cisco Show and Share, 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 the *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. This role is a superset of User.
- 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

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- Hidden Community Creator
- Restricted Community Creator

User Interface

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

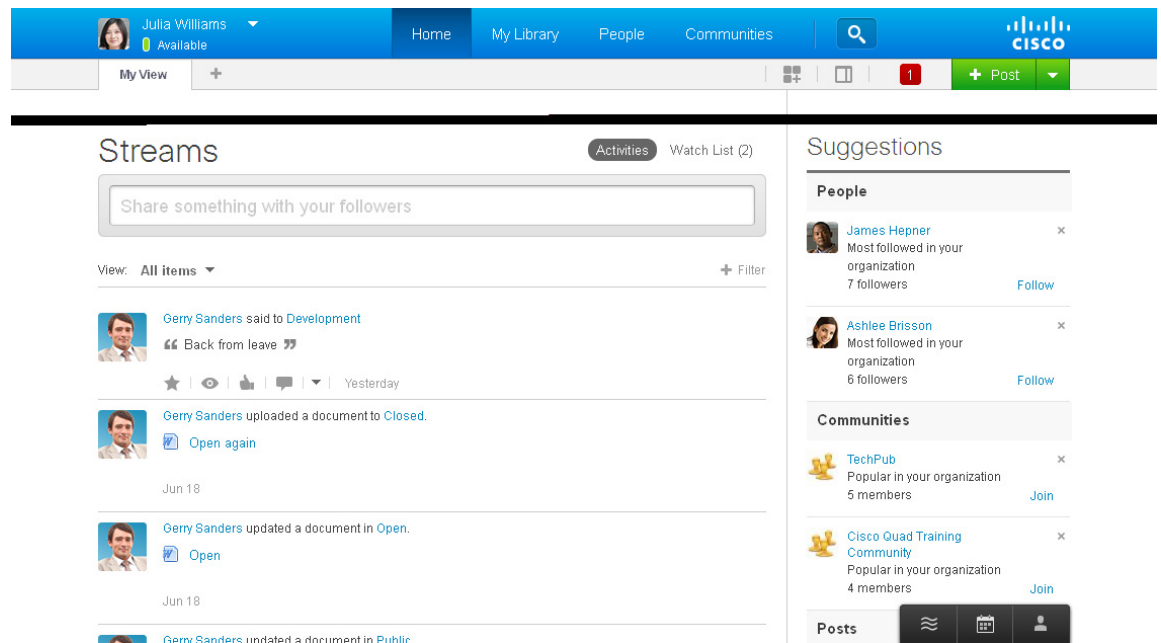
- [Sign-in Page, page 4](#)
- [Global Navigation Bar, page 5](#)
- [The WebEx Social Dock, page 6](#)
- [Getting Help or Providing Feedback, page 7](#)


Sign-in Page

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



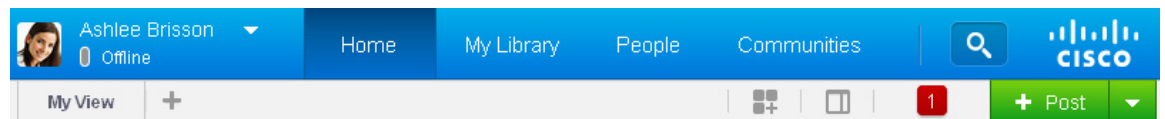
After you sign in, you are by default on the Home page:

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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.

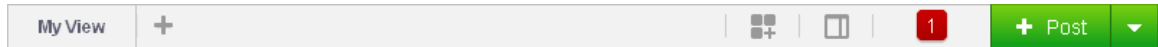


The upper section includes the following, from left to right:

- 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 or autoset by your external chat client. (This feature is available only if Cisco WebEx Social is integrated with the instant messaging solution of your organization.)
- 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 gives you simple access to your posts, videos, documents, and images.
 - **People**—This page provides you with several ways to search for, locate, and contact others.

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- **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 45.)



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

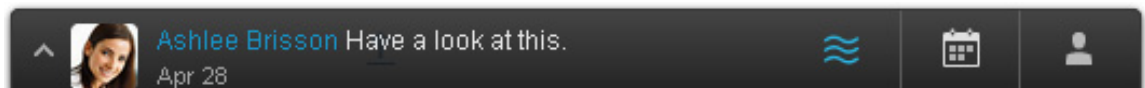
At the bottom of the page, you see the Cisco WebEx Social dock.



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, even if you remove the Streams application from your Home page.



Chat—This icon appears only when you are using the click-to-chat or click-to-call feature. Note that these features are available only if Cisco WebEx Social is integrated with the instant messaging/calls solution of your organization and the integrated chat and calls client has been enabled.

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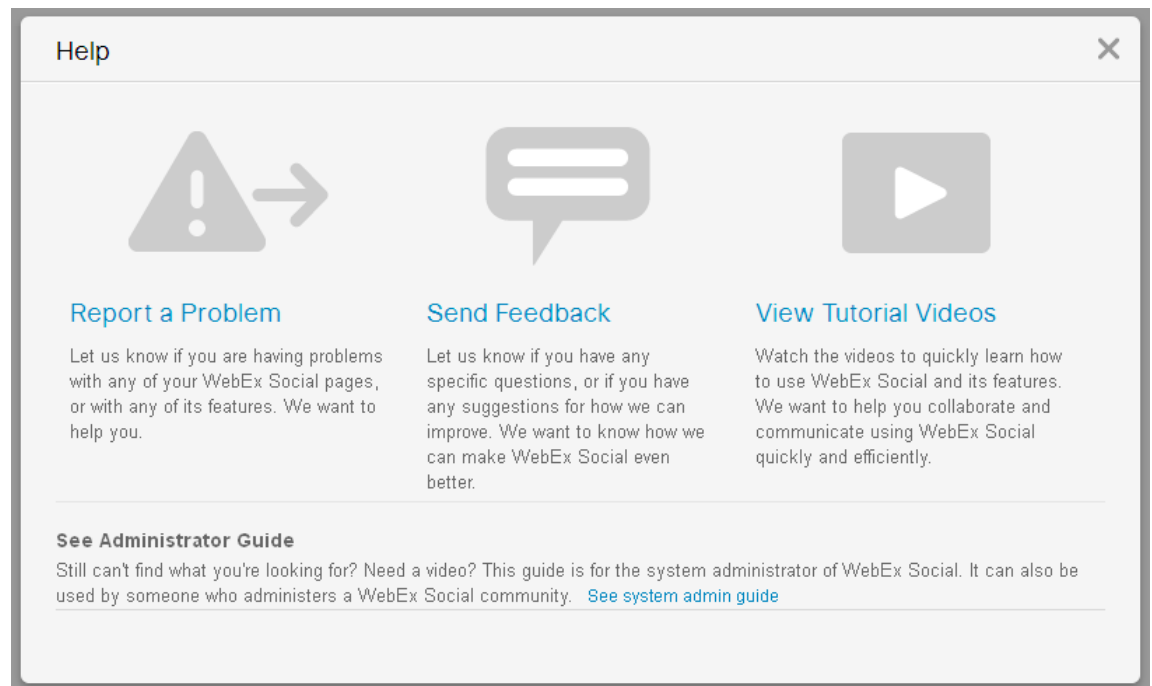
Contacts—This expandable window displays all of your contacts. The search box at the bottom allows you to search for people in your contacts list or your organization directory, or type a number to dial (available only if Cisco WebEx Social is integrated with the Cisco Communications Manager of your organization).



Calendar—This expandable window displays a calendar that combines your Outlook or Lotus Notes events 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 12.

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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 your Profile page. 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
- Bookmarks—Allows you to add bookmarks and organize them in folders
- 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
- External Document Repository—Allows you to access external document repositories such as Microsoft SharePoint 2007 or EMC Documentum repositories (see [External Document Repository, page 48](#))
- 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—Tries and captures the most relevant tags from the page it has been added to and allows you to navigate using those tags
- Voice Messages—Allows you to see, listen, and reply to voice messages left on your phone
- Wiki—Allows you to add a wiki

First Time Setup

When you first sign in to Cisco WebEx Social you are greeted by a quick account setup screen. It allows you to get up to speed with your coworkers who have already been using Cisco WebEx Social for a while.

Depending on how your system administrator set up the quick setup screen it can help you to:

- Take the first steps to set up your [Filling in Your Profile Page](#):

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- Add your photo so other people can easily recognize you
- Put in a few words to describe yourself
- Indicate your expertise as tag words
- Start following [Finding People](#) who you work frequently with
- Join the [Participating in Communities](#) you want to contribute to

Account Setup



Hi Ashlee!

Welcome to WebEx Social. We filled in a few things to get you started. Add more and make changes to improve your experience.

Add your photo
More Info



Upload photo



Describe yourself
More Info

Write a short bio about yourself. This will help your co-workers get to know you better



Add your expertise
More Info

Add Tags (At least one tag is required to suggest experts)



Follow co-workers
More Info



Add More



Join communities
More Info



Add More



Search Webex Social communities

Done

Entering Your Master Password

Cisco WebEx Social lets you combine many of the tools and services that you need throughout your workday and use them from a single location. Calendar, meetings, documents, calls—they are all here.

Previously, you might have been asked to enter your username and password separately for each of those tools or services even if they matched. Cisco WebEx Social's Master Account feature allows you to enter your username and password once and you will be automatically authenticated to each of the covered tools and services.

To enter your master password:

- Step 1** Select **Account Settings** from your profile menu.
- Step 2** Click **Master Account** under My Account.
- Step 3** Notice the table labeled Services using the master account. These are the services that will use the username and password you enter. You need to provide credentials separately for other services that are supported by Cisco WebEx Social but are not listed there.

DRAFT--CISCO CONFIDENTIAL**Note**

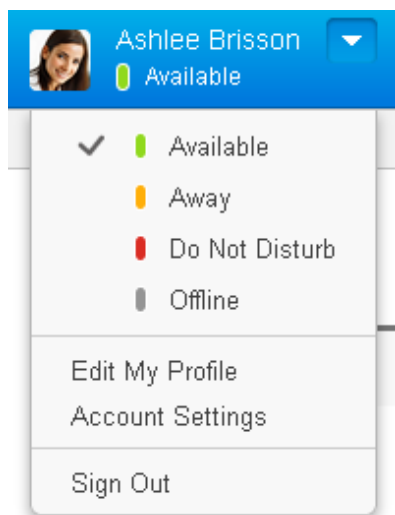
If you do not want to use your master password with one or more of the services listed, you can go to the service's settings tab and sign in with another user. For example if Calendar is listed as a service to use the master password but you want to use another, go to Calendar and WebEx Login and enter your other username and password.

Step 4 Enter your **Username** and **Password**.

Step 5 Click **Save**.

Setting Your 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.

**Note**

This feature is available only if Cisco WebEx Social is integrated with the instant messaging solution of your organization.

**Note**

Setting availability is available only if Cisco WebEx Social is set up to use the integrated chat and calls client. If you are using an external client such as Cisco Jabber for chat and calls, your Cisco WebEx Social availability will reflect your external client availability. For more information see [Not Available, Do Not Disturb and Setting Availability Using External Client](#), page 52, in the [Appendix](#).

Continue reading [Details About Availability](#) in the [Appendix](#) to learn more about how availability works.

If you are running a standalone instant messaging/availability client along with Cisco WebEx Social, or 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:




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- [Cisco WebEx Social Availability Behavior when Using Cisco WebEx Social with Cisco Unified Presence, page 50](#)
- [Multi-Instance Behavior for Cisco WebEx Social Chat, page 51](#)

Posting an Update

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

1. 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.

2. 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. (A pop-up window opens the first time you use this feature 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**.

Setting Up Your 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:

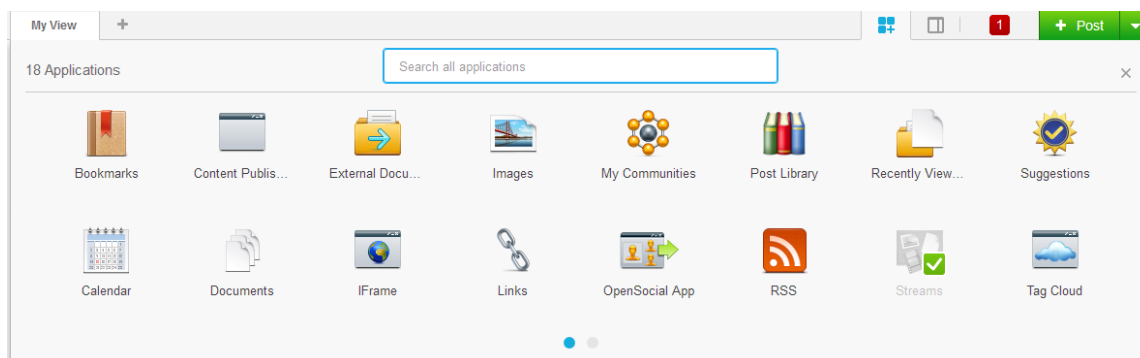
- [Add an Application, page 12](#)
- [Integrate Your Calendars, page 13](#)
- [Change Your Page Layout, page 16](#)

Add an Application

Take these steps to add an application to a page:

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](#).)

Integrate Your Calendars

The Calendar application is included by default on your Home page. Even if you choose to remove the application, you can access your Calendar from the Cisco WebEx Social dock. Calendar displays events from these sources:

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- Your [Outlook](#) or [Lotus Notes](#) calendar. This feature is available only if your organization uses Microsoft Exchange Server or IBM Lotus Domino respectively.
- Your [Cisco WebEx](#) calendar.

Outlook

To set up Calendar to connect to your default Outlook calendar as configured by your system administrator, set up your master account as described in [Entering Your Master Password](#).

If you want to connect to a different account that you may have, follow these steps:

Step 1 Select **Account Settings** from your profile menu.

Step 2 Click **Calendar and WebEx Login**.

Microsoft Exchange

Connecting to Microsoft Exchange synchronizes your Exchange calendar to this app

☒ Connect to Microsoft Exchange

Signed in as Ashlee Brisson (abrisson). [Sign out to sign in with another account](#).

Server *



<https://example.com/EWS/Exchange.asmx>

Test

Step 3 Check **Connect to Microsoft Exchange** if it is not already checked.

Step 4 Click the **Sign out** link.

Step 5 Enter your alternative **Username** and **Password** in the form that displays.

**Note**

If your mail server is located in a subdomain you need to enter your UPN as Username. UPNs look like “username@subdomain.example.com”. Contact your System Administrator if you do not know your UPN.

Step 6 Click **Test** to test the connection to the server.


Step 7 If you see a success message, click **Save**.

Step 8 If you see an error message then you probably need to specify a different Exchange server. In the **Server** field that appears, enter the calendar service URL provided to you by the calendar service administrator.

DRAFT--CISCO CONFIDENTIAL**Microsoft Exchange**

Connecting to Microsoft Exchange synchronizes your Exchange calendar to this app

☒ Connect to Microsoft Exchange

 Signing in was unsuccessful. Please provide valid Microsoft Exchange service URL.

* Required Fields

Username *



klavelle

Password *

••••••••

Server *



https://example.com/EWS/Exchange.asmx

Test

Step 9 Click **Test**.

Step 10 When you see the success message, click **Save**.

**Note**

When you make changes to your desktop Outlook calendar, there may be a time delay (15 min. by default) before the changes are reflected in your Cisco WebEx Social calendar.

Lotus Notes

To integrate your Lotus Notes calendar:

Step 1 Select **Account Settings** from your profile menu.

Step 2 Click **Calendar and WebEx Login**.

Step 3 Check **Connect to Lotus Domino**.

This form displays with your Username prepopulated:

DRAFT--CISCO CONFIDENTIAL**Lotus Domino**

Connecting to Lotus Domino synchronizes your Notes calendar to this app

☒ Connect to Lotus Domino

* Required Fields

Username *



abrisson

Password *

Test

-
- Step 4** Verify the **Username** that Cisco WebEx Social has suggested. Enter the correct one if needed.
- Step 5** Enter your Lotus Notes **Password**.
- Step 6** Click **Test** to test the connection to the server.
- Step 7** When you see the success message, click **Save**. If you see an error message, you may need to try [Manual setup, page 15](#).
-

Manual setup

You may need to manually enter server details if your calendar service cannot be automatically detected based on your username and password alone. Contact your System Administrator if you face problems configuring your Calendar application.


These are the manual steps:

-
- Step 1** Complete the steps in [Lotus Notes, page 14](#).
The Server and Domino fields appear.
- Step 2** In the **Server** field, enter the calendar service URL provided to you by the calendar service administrator.

DRAFT--CISCO CONFIDENTIAL**Lotus Domino**

Connecting to Lotus Domino synchronizes your Notes calendar to this app

☒ Connect to Lotus Domino

 Signing in was unsuccessful. Check your Lotus Domino username and password and try again.

* Required Fields

Username * 

Password *

Server * 

Domain

Step 3 Enter the Lotus Domino **Domain** as provided to you by the calendar service administrator.

Step 4 Click **Test**.

Step 5 After you see the success message, click **Save**.

Cisco WebEx

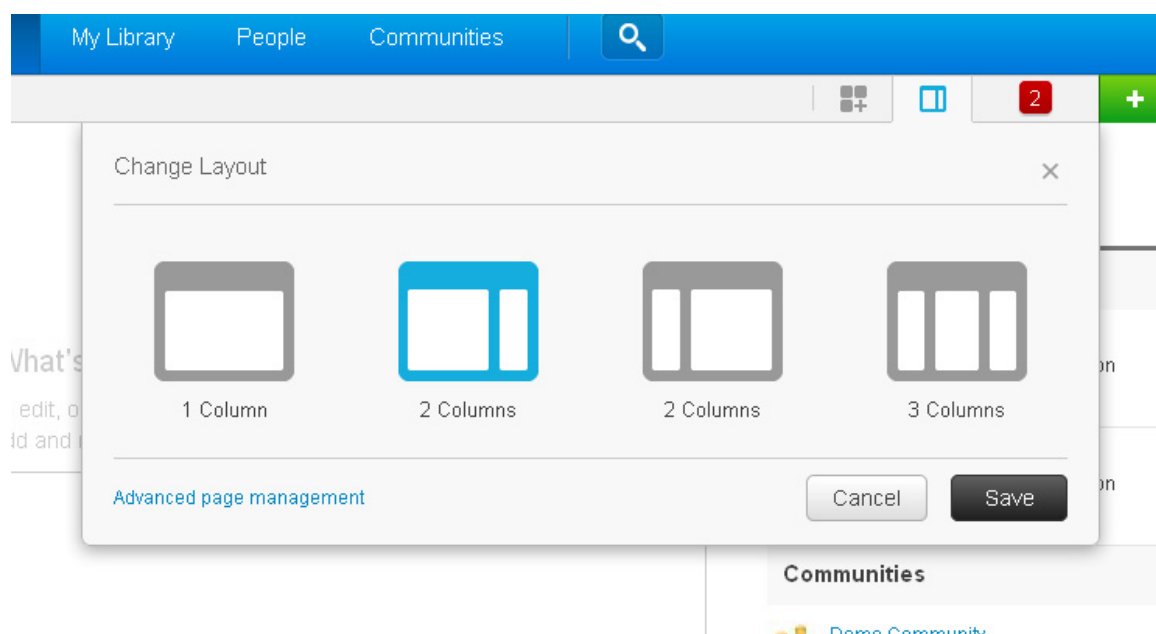
Your Cisco WebEx calendar events appear when you set up to use Cisco WebEx. See [Before you Begin](#) in [Online Meetings with Cisco WebEx](#), page 26.

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.

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Filling in Your Profile Page

Your Profile is a public page about you that everyone can see. To access it, click your name in the global navigation bar.

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 [Creating Posts, page 23](#) to learn how to add posts to this tab. This page is the only place on your 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 18](#)
- [Set Your Contact Information and Enter Your Interests, page 18](#)

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Add Your Photo

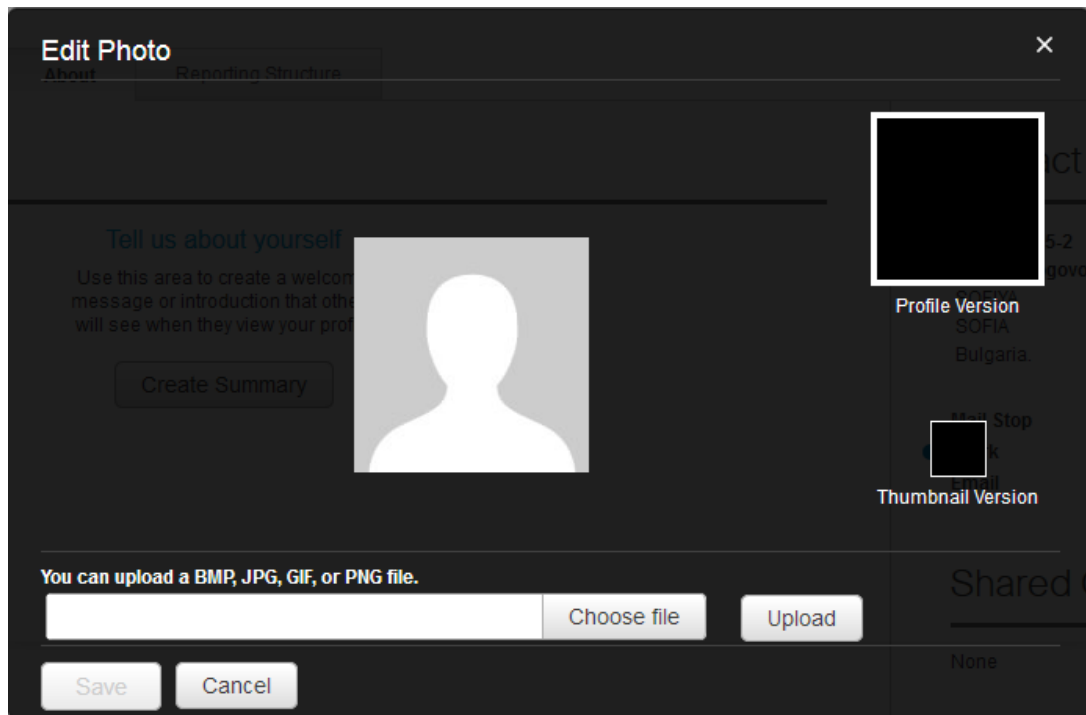
Take these steps:

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.

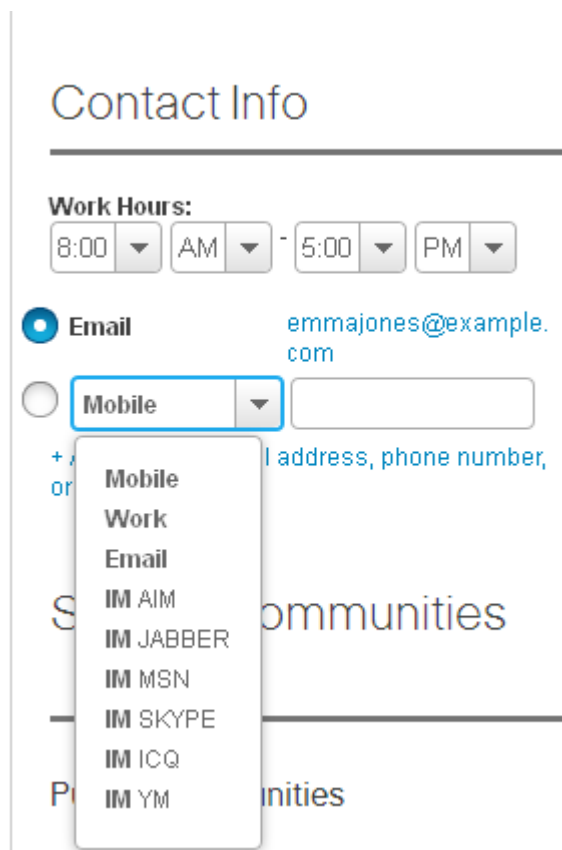
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4. Make sure your default time zone is set correctly.

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.



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.

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Expertise:

documentations ×
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**.

Finding 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.

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The screenshot displays the 'All Contacts' section of the Cisco WebEx Social interface. On the left, a sidebar shows navigation options: 'My Contacts' (1), 'All Contacts' (18), 'Recents' (1), 'Favorites' (0), 'Following' (1), 'Followers' (0), 'Lists', and 'Accountancy'. The main area, titled 'All Contacts', features a search bar and a list of contacts. A hover card for James Hepner is shown, displaying his profile picture, name, title (Engineer), and status (Offline). The card also shows a recent post from October 10 about 'weekly escalation trends' and a 'Following' button. Other contacts listed include Ashlee Brisson (Illustrator&(Writer), Available), Grigoriy Vasilyev (Offline), and Jing Lee (Team Lead, Offline).

4. Contact the person using the action buttons | | | | | on their contact card or profile page. (See [Instant Messaging with Click to Chat](#), page 28, [Audio and Video Calls with Click to Call](#), page 31, [Using Click to Email](#), page 34, [Meet with a Particular Person \(Click to Meet\)](#), page 28, [Using Click to Create a Private Post](#), page 34, and note the required Cisco Unified Communications integrations.)
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

The screenshot shows the 'My Contacts' list. At the top, there is a search bar with the placeholder text 'Enter a Name or Number'. Below the search bar, the list is titled 'Main' and contains three contact entries: Ashlee Brisson (Offline), James Hepner (Offline), and Kelly Lavelle (Offline). Each entry includes a profile picture and a status indicator.

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 [Inviting a Person to Cisco WebEx Social](#).

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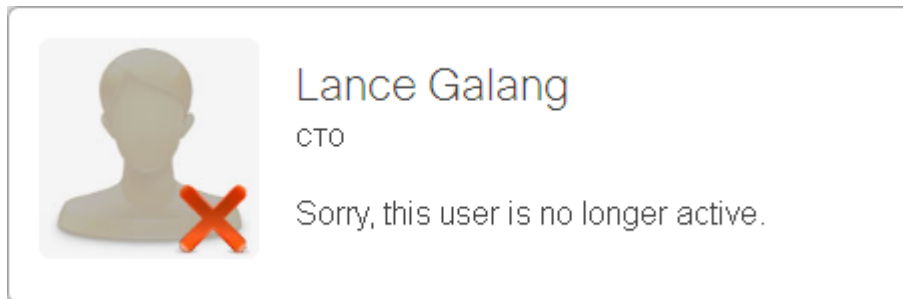
By default, all your contacts appear in the Main list. Lists are useful for sharing content. For example, if you share posts with a set group of people regularly, you can create a contact list, add those people to the list and then use the list name to share a post with that contact group instead of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

- a. Click the gear icon at the top of My Contacts and then click **Create New List**.
- 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:



Participating in 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. Content in this type of community only displays in search results for members of the restricted community.
- 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.

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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, a sidebar contains navigation links: 'Communities I'm Member of' (1), 'Communities I Manage' (0), 'All Communities' (11, highlighted), 'Recent Communities' (1), and 'Favorite Communities' (0). Below these are 'Categories' with counts: 'General' (11), 'Project Community' (10), and 'Product Community' (10). The main content area is titled 'All Communities' and features a search bar labeled 'Search all Communities'. A table lists communities with columns: Name, Category, Members, and Type. The listed communities are:

- Administration**: This is a new community to share administration information. Category: General, Members: 2, Type: Open. Tagged as: administration, policies.
- Cisco Quad Training Co...**: Find training materials on Quad. Category: General, Members: 4, Type: Open. Tagged as: quad, training.
- Demo Community**: For VoD purposes. Category: General, Members: 3, Type: Open. Tagged as: vod.
- Development**: Development department. Category: General, Members: 2, Type: Open. Tagged as: development.
- Financial Community**: Financial Community. Category: General, Members: 2, Type: Open. Tagged as: financial.

 Each entry includes a 'Join' button. At the bottom right, there are icons for a menu, 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.


Creating Posts

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

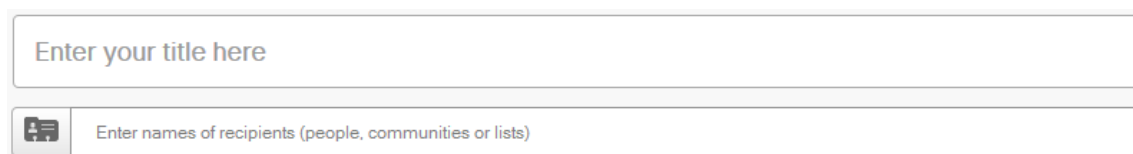
DRAFT--CISCO CONFIDENTIAL**Note**


For post creation using an email client, see [Using Email to Interact with Cisco WebEx Social](#), page 37.

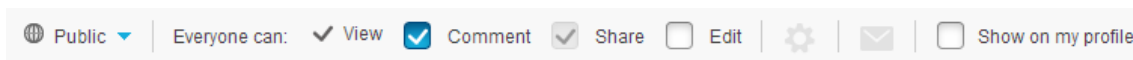
These are steps you can take to get started:

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 page.




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 (or communities) 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.

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	Permissions	Comment	Share	Edit	Authorize Permissions
People (2)					
<input type="checkbox"/> Gerry Sanders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> James Hepner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Communities (1)					
<input type="checkbox"/> TechPub	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 a video by clicking the video icon  (Note that this feature is available only if Cisco WebEx Social is integrated with Cisco Show and Share)
 - 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.

Seeking Assistance with Questions

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

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- 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 best match the tags you entered 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**.

Online Meetings with 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.

This chapter is organized as follows:

- [Before you Begin, page 26](#)
- [Scheduled Meetings, page 27](#)
- [Create an Instant Meeting, page 28](#)
- [Meet with a Particular Person \(Click to Meet\), page 28](#)

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).

DRAFT--CISCO CONFIDENTIAL**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




It opens to display the meeting details.

3. Click **Join** or **Start**.

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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 (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.

Instant Messaging with Click to Chat

**Note**

This feature is available only if Cisco WebEx Social is integrated with the instant messaging solution of your organization.

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.

This chapter is organized as follows:

- [Before you Begin, page 29](#)
- [Sending Messages, page 29](#)
- [Audio Notification for Incoming Chat Messages, page 30](#)

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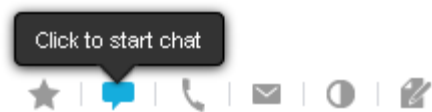
Before you Begin

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

Sending Messages

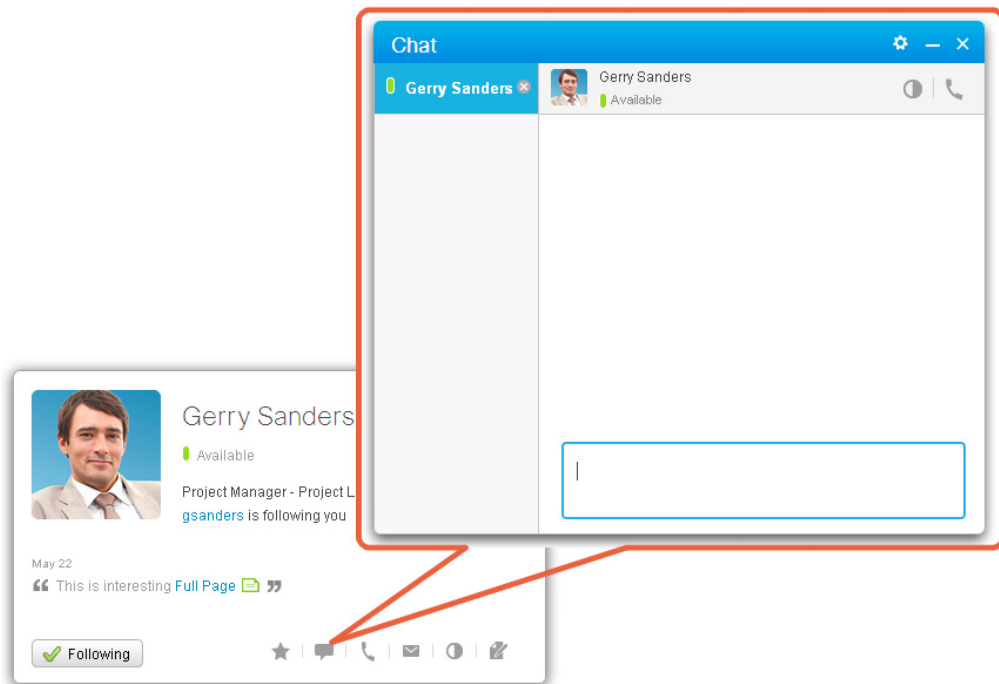
To send an instant message to another user:

1. Click the chat icon on a contact card, profile page, or on the information pane in the Calendar application.

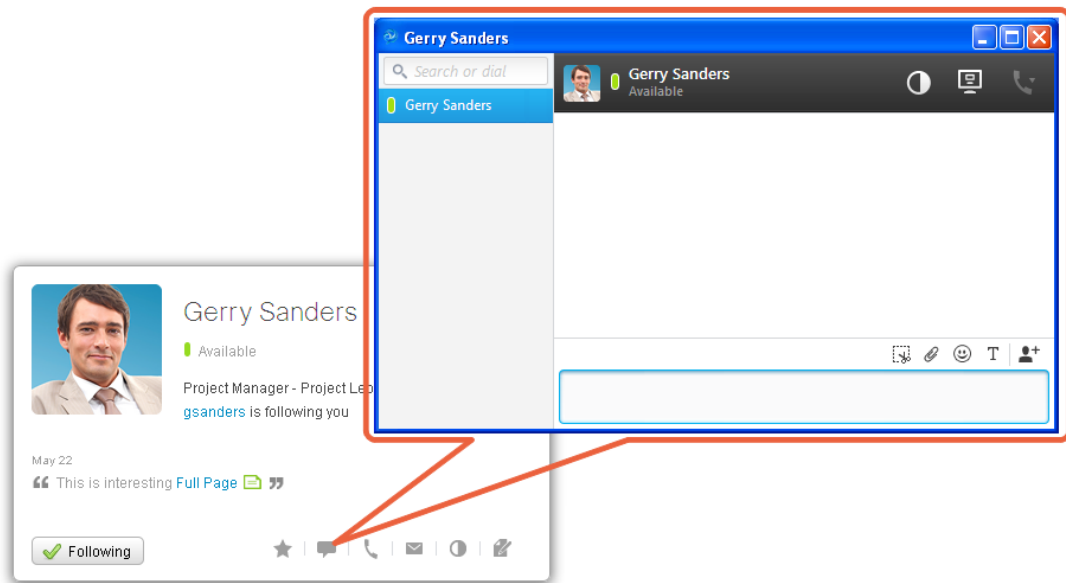


Depending on how your System Administrator has set up Cisco WebEx Social, the integrated chat window or your desktop chat client opens.

- If Cisco WebEx Social is set up to use the integrated chat client:



- If Cisco WebEx Social is set up to launch an external client:

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



Audio Notification for Incoming Chat Messages

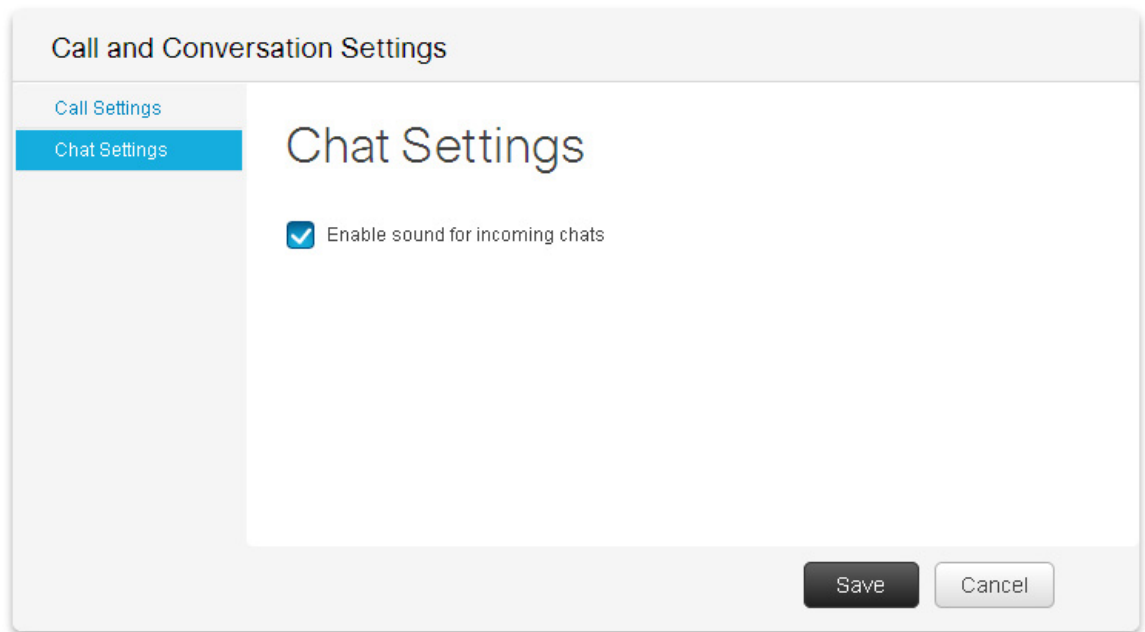
**Note**

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**.

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5. Click **Save**.

Audio and Video Calls with Click to Call



Note

This feature is available only if Cisco WebEx Social is integrated with the Cisco Unified Communications Manager of your organization.

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

This chapter is organized as follows:

- [Before you Begin, page 31](#)
- [Placing a Call, page 32](#)
- [Receiving a Call, page 34](#)

Before you Begin

- If you have a **desktop phone (or another hardware device)** and you want to use it with Cisco WebEx Social—You must first select the phone to use. Click your profile menu and select **Account Settings**, then select **Call and Conversations > Phone Preferences**. Click the device you want to use and then click **Test Call** to try the service. When you had a successful test call, click **Save**.

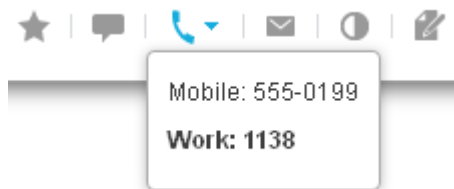
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- If you are using the Cisco Call Plug-in (Cisco Web Communicator)—You must first install the browser plug-in. Complete these steps to download the plug-in:
 - a. Click your profile menu and select **Account Settings**.
 - b. Select **Call and Conversations > Phone Preferences**.
 - c. Click the **Download Plugin** button.
 - d. After the download has finished, quit all web browsers on your computer.
 - e. Go to the folder where you saved the installer and run it.
 - f. Follow the on-screen instructions to install the Call Plug-in.

Contact your System Administrator if you have any problems downloading or installing the plug-in.

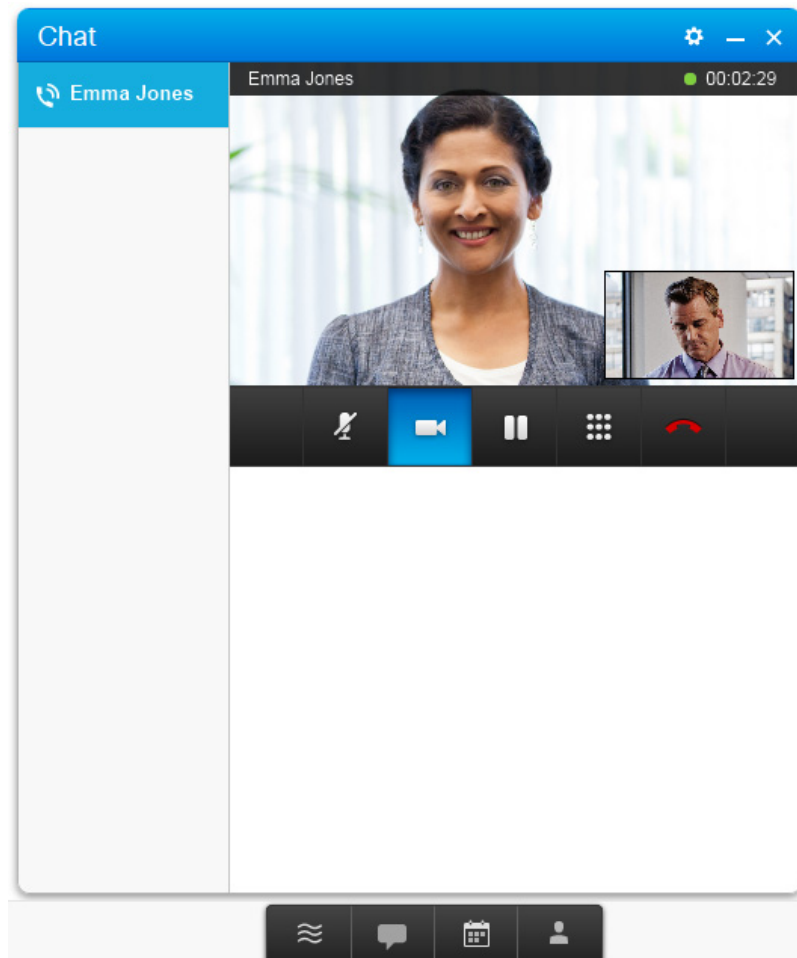
Placing a Call

- To call the person using their preferred phone number, click the phone icon.
- To call the person using one of their alternate phone numbers, hover over the phone icon and select a different number.

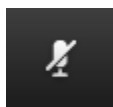


- To dial an arbitrary number, click the Contacts icon and enter the number in the Search field at the bottom.

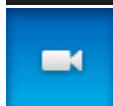
The phone number of the person is dialed and this dialog box appears:

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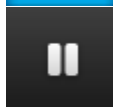
When the other party receives the call, you can:



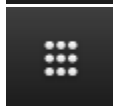
Mute your microphone.



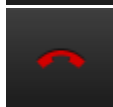
Send video. If the other party has chosen to send their video as well, it replaces the user picture. To see your video, hover your mouse over the video window.



Put the call on hold.



Open a 12-key dial pad to send DTMF tones.



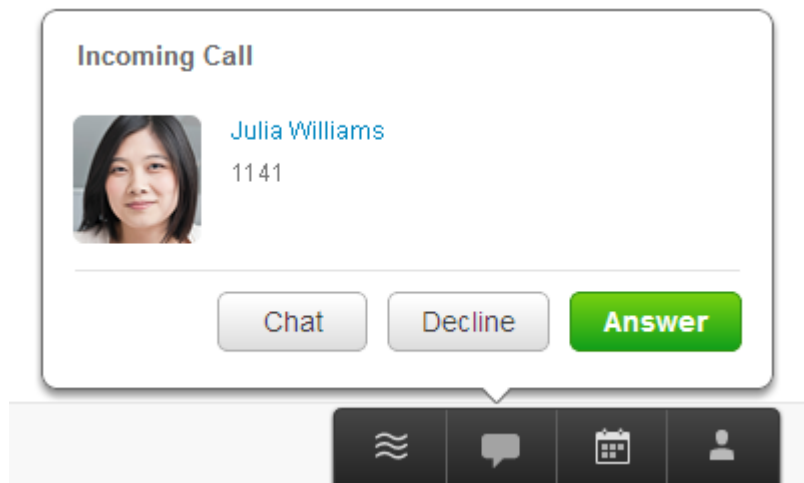
End the call.

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You can also write and receive chat messages in the area below the actions buttons, minimize the call by clicking the minimize button on the dialog box, and restore a minimized call by clicking the Chat icon on the Cisco WebEx Social dock.

Receiving a Call

Whenever you receive a call in Cisco WebEx Social, a pop-up appears with options to Answer or Decline the call. If you prefer to not have a voice/video call at the moment, you can click Chat to start an IM session with the person instead (only available when using the Cisco Call Plug-in and when the caller is identified as supporting IM).



Using Click to Email

“Click to email” is a quick way to start an email to a Cisco WebEx Social user whose contact card or profile you are viewing.

Click the email icon whenever you see it in Cisco WebEx Social to start a new message in your default email client with the email address of the person prepopulated.



Using 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.

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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 yields you the same result.

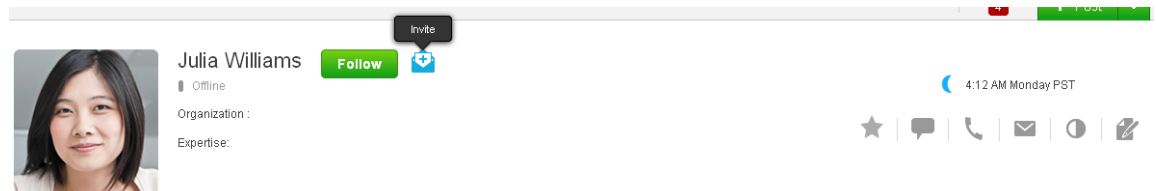
The post does not differ in any way from a normal post but the following is completed for you:

- 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.

Inviting a Person to Cisco WebEx Social

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.

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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. For example the Wiki application, when added to a community, creates a starter post where all community members have edit permissions. If you take the Share and Edit permissions from them, you effectively produce a Blog.
- **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 your Profile page, 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

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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.

Using Email to Interact with Cisco WebEx Social

Cisco WebEx Social allows you to use your email client to quickly and easily contribute to your Cisco WebEx Social communities or content of other users. Use this feature when you are on the road, at home, or wherever you are unable to sign in to Cisco WebEx Social.

This section is organized as follows:

- [Email Notifications, page 37](#)
- [Creating Content Using Email, page 40](#)

Email Notifications

This section is organized as follows:

- [Notifications About Content and Activities, page 37](#)
- [Unsubscribing from an Individual Post or Update, page 38](#)
- [Administrative Notifications, page 40](#)

Notifications About Content and Activities

With email notifications about content and activities you can keep track of all important Cisco WebEx Social activities directly from your email client. You can choose to receive instant notifications of events or a daily or weekly digest, or both. This type of email notifications are turned off by default and you first need to configure your personal settings for email notifications.

To turn email notifications on:

1. Select **Account Settings** from your profile menu.
2. Select **Email Notifications**.

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Settings

My Settings
My Account
Productivity Plug-ins

My Account

Email Notifications

Choose the email notifications sent to abrisson@example.com

☒ Send me a summary of all important updates.

Activity Snapshot frequency: Daily

☒ Send me individual email notifications for the following events:

People	Someone starts following me.	<input type="checkbox"/>
Content	Someone @mentions me.	<input checked="" type="checkbox"/>
	Someone shares a post with me.	<input checked="" type="checkbox"/>
	Someone edits or comments on my post.	<input checked="" type="checkbox"/>
	Someone shares my post with others.	<input checked="" type="checkbox"/>
	Someone edits or comments on a post I have previously contributed to.	<input type="checkbox"/>
	Someone edits or comments on a post I have manually added to my Watch List.	<input checked="" type="checkbox"/>
Community Membership	My request to join a community is approved or denied.	<input checked="" type="checkbox"/>
	My request to create a community is approved or denied.	<input checked="" type="checkbox"/>
	Someone invites me to a community.	<input checked="" type="checkbox"/>
	Someone asks to join a community I own.	<input checked="" type="checkbox"/>

Ashlee Brisson

User Information

[Details](#)
[Communities](#)
[User Groups](#)
[Roles](#)

Calendar and WebEx

[Calendar and WebEx Login](#)
[WebEx Instant Meetings](#)

Notifications

Email Notifications

Call and Conversations

[Chat Password](#)

Identification

[Social Network](#)

Miscellaneous

[Display Settings](#)
[Custom Attributes](#)
[CMIS Settings](#)

Save
Cancel

To receive a daily or weekly summary of updates

1. Check the **Send me a summary of important updates** box.
2. Select the frequency from the drop-down menu.

To receive instant notifications of events

1. Check the box beside **Send me individual email notifications for the following events**.
2. Select your preferred events.

When you have finished making your selections, click **Save** to save your preferences and you are all set to start receiving your email notifications.

**Note**

Receiving notifications about new discussions in your communities is not controlled from the Email Notifications screen. To opt in/out of such notifications, you must go to the community and subscribe to (or unsubscribe from) the relevant discussion category.

Unsubscribing from an Individual Post or Update

You may wish to unsubscribe from instant email notifications for a particular post or update. There are a number of ways to do this. You can remove the post or update from your Watch List, or you can unsubscribe using your email client.

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To remove a post or update from your Watch List:

1. Find the post or update in your Watch List.
2. Click the down arrow on the right hand side of the post.
3. Click **Remove from Watch List**.

Streams

Activities **Watch List**

View: **All items** ▾ Show: **Most recent** ▾ + Filter

[Martin Toshev](#)

Weekly Project Updates

★ | 👍 | 💬 | ↻ | ▾ | 4:01 PM

Remove from Watch List

Hide until new activity appears

[Martin Toshev](#)

You stop receiving any more instant notifications about this post or update.

You can also unsubscribe from a post or update by using your email client. Click the **Unsubscribe** link that is available at the end of each email instant notification you receive.

WebEx Social

[Martin Toshev](#) shared a post with you:

[Project Updates](#)

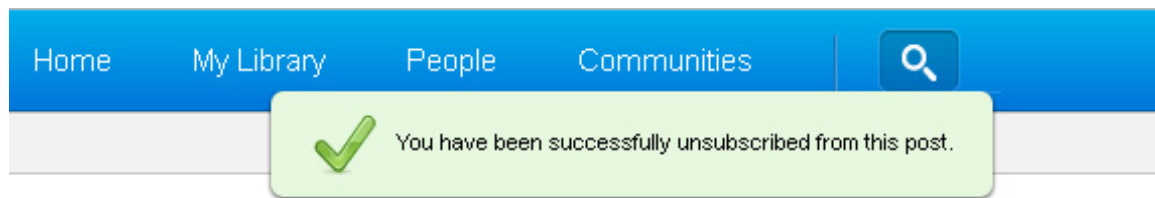
➔ Reply to this email to post a comment in WebEx Social

This message was sent to tl@example.com. If you do not wish to receive emails of this type, visit your account settings to manage [email notifications](#).

If you wish to stop receiving notifications about this post only, click [Unsubscribe](#).

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You receive the following confirmation in WebEx Social:

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If you wish to receive instant notifications again, add the post or update back to your Watch List or reply to a previous email notification using your email client.

Administrative Notifications

Your system administrator can choose to also send emails about notifications that are displayed in your Cisco WebEx Social global navigation bar, giving you another channel to receive important information about Cisco WebEx Social in a timely manner.

System email notifications cannot be turned off.

Creating Content Using Email

You can use your email client to create and comment on Cisco WebEx Social content. You can create a new post:

- in your library
- in your community library
- in a discussion in your community
- as Featured Content on your profile page

You can add also comments to posts, discussions, and updates by replying to email notifications.

Before you start sending email to Cisco WebEx Social, you need to [Obtain the Email Address of the Content](#) or install the [Email Plug-in](#). Then you are all set to open your email client and start [Contributing Content](#) to Cisco WebEx Social.

Community owners or administrators can also be [Linking Mailing Lists to a Discussion Category](#).

Obtain the Email Address of the Content

To create posts in Cisco WebEx Social using email, you need to get an email address to send the content to.

Email Address for My Library

To get the email address of your personal library:

1. Go to your library.
2. Click the Posts tab.
3. Click **My Posts** or **All Posts** in the left-hand pane.
4. Click the Mail Icon beside **My Posts** or **All Posts** to launch your email client. The email address is automatically added to your message.

DRAFT--CISCO CONFIDENTIAL**Note**

For subsequent emails, when you start typing My Library in the “To” field, the email client auto-completes the address for you.

Email Address for My Community Library

To obtain the email address of a community library:

1. Go to the community to whose library you want to post.
2. Right-click the Community Library link in the Community Email application and select Copy Email Address. (You can also click the link to directly launch your email client with the “To” field filled in.)
3. Save the copied email address in your address book or paste it in your email client to send mail right away.

**Note**

For subsequent emails, when you start typing the community library name in the “To” field, the email client auto-completes the address for you.

Email Address for a Discussion Category

To create or contribute to a new discussion in your community using email, you need to know the email address of the discussion category. To obtain the email address:

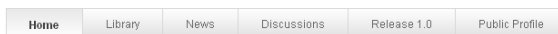
1. Go to the community’s Home tab and find the Community Email application.
2. If you want to post to the General category, right-click the **General** link and select Copy Email Address. (You can also click the link to directly launch your email client with the “To” field filled in.)
3. If you want to post to another category, click the **See All** link to see the full list of categories, then hover over the category you need and click the **Copy** button. (You can also click the link to directly launch your email client with the “To” field filled in.)
4. Save the copied email address in your address book or paste it in your email client to send mail right away.

**Note**

For subsequent emails, when you start typing the discussions category in the “To” field, the email client auto-completes the address for you.



Project Jupiter



Members

Welcome to the Community



Use this area to introduce your community to members. You can describe the purpose of the community, provide important information, and add community branding. Community owners can edit this text and use Featured Content area to link to useful resources.

Community Email

Create a post by sending an email to:

[Community Library](#)

Start a discussion by sending an email to:

[General](#)

[See all](#)

DRAFT--CISCO CONFIDENTIAL**Email Address for Featured Content**

To get the email address for Featured Content:

1. Click your username in the **Global Navigation Bar**.
2. Click the Featured Content tab.
3. Right-click the mail icon that is beside Featured Posts to launch your email client. (You can also click the link to directly launch your email client with the “To” field filled in.)

**Note**

For subsequent emails, when you start typing Featured Content in the “To” field, the email client auto-completes the address for you.


Email Plug-in

The WebEx Social for Office and the WebEx Social for Notes plug-ins make it even easier for you to send content to and tag content in WebEx Social community libraries and discussions using your email client. Users can easily access and search for community and discussion category email addresses directly from their email client.

Before you begin

You must first install the plug-in. Complete these steps:

- Step 1** Exit your email client.
- Step 2** Go to Cisco WebExSocial, open your profile menu and click **Account Settings**.
- Step 3** Click **My Settings > Productivity Plug-ins**.
- Step 4** In the table, find the email client you are using and click the download link for your operating system.
- Step 5** The download begins. Choose to save the file to your hard drive.
- Step 6** After the download has finished, quit your email client on your computer.
- Step 7** Go to the folder where you saved the download and run it.
- Step 8** Follow the on-screen instructions to install the plug-in.
- Step 9** After the installation completes, start your email client.
- Step 10** A settings dialog box appears. Depending on you email client, do one of the following:
 - Microsoft Outlook
 - a. Specify the address you normally enter to connect to Cisco WebEx Social and click **Sign In**.
 - b. Use the dialog box that appears to enter your username and password.

Later, if you want to change your settings, you can always do that by right-clicking the plug-in icon  in the notification area and selecting Settings.
 - IBM Lotus Notes
 - a. Specify the address you normally enter to connect to Cisco WebEx Social.
 - b. Enter your **Username** and **Password**.
 - c. Click **OK** to connect.

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Later, if you want to change your settings, you can always do that from Lotus Notes. Go to File > Preferences and select WebEx Social. Clicking the Enter WebEx Social Credentials button opens the same dialog box.





The plug-in is now ready for use. Contact your System Administrator if you have any problems downloading or installing the plug-in.

**Note**

The WebEx Social for Notes plug-in installer for Microsoft Windows must be run as Administrator.

To use the plug-in, start your email client and open a new email message. Publish to WebEx Social menu icons have been added to your email client. There are two options in this menu: Browse and Add Tags. Browse provides you with a searchable address list of your library, your community libraries, discussion categories, and your featured content. Use Add Tags to insert a #tag into your subject line to enable tagging of your WebEx Social content.

To browse for your library, community, discussion or featured content:

1. Click on the Browse icon in the menu and an address list opens.
2. Click on the + sign to expand each item, if necessary. Communities are denoted by this  icon, discussion categories by this  icon, your personal library by this  icon, and your featured content by this  icon.
3. You can search for an address by entering the name in the search box.
4. Select and double-click the relevant address to copy it into the To: field of the dialog box.
5. If you wish to use Cc or Bcc, highlight the relevant address and click on the appropriate Cc or Bcc button to add the address.
6. When you have finished with your selection, click on OK to close the window and the addresses you have selected are added to your email client's address fields.
7. Complete all the other details of your post and press Send to post your content to Cisco WebEx Social.

To add a tag to your post:

1. Click on the Add Tags icon and the # symbol is added to the subject line of your email.
2. Enter the keyword you wish to tag immediately following the #. You can add multiple tags if you wish.
3. Complete the mail and click Send.

The tags is added to you post in WebEx Social.

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Contributing Content

To create a post:

1. Open your email client and start a new email.
2. In the To: field, enter the email address that you want to post to.
3. Enter a subject. It appears as a post name or a discussion topic.
4. Compose your post content in the email body.
5. Add any attachments.
6. Click Send.

**Note**

Attachments are only added in Cisco WebEx Social to new items. Attachments to comments, or replies to notifications are not included in the reply.

To share a post with other users

To share a post that you create from your email client with Cisco WebEx users other than the community members, add the user email address to the “To” or “CC” address field. The post then appears in their Watch List.

To add tags

Tags can be added to posts and discussions created using your email client by adding the hash “#” symbol. To include a tag:

1. Enter your post heading as a subject.
2. Enter the hash # symbol followed by the keyword you wish to tag, for example #Project. You can add multiple tags if you wish.
3. Complete the email and click Send.

**Note**

Always add your hash tags at the end of the Subject line. Any words after the first # symbol in the Subject become tags.

The tags are added to the post in Cisco WebEx Social.

To contribute by replying to a notification

You can reply to a notification you receive from Cisco WebEx Social and your reply is included in the original post or discussion. To reply to a notification:

1. Open the email notification.
2. Click the Reply button in your email client.
3. Add your comments as you would in a normal email and click Send.
4. Your reply is captured as a new comment, or a reply, to the original Cisco WebEx Social item.

**Note**

Attachments to replies are not included in Cisco WebEx Social.

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Linking Mailing Lists to a Discussion Category

Community owners and administrators can link a Discussion Category to a mailing list. Any content generated in the category is emailed to the members of the mailing list.

In addition, the mailing list administrator has the option to include the Discussion Category as a member allowing any content sent to the mailing list to be copied to the linked Cisco Webex Social discussion category and saved as new discussions or replies.

To link a mailing list to a Discussion Category

Take these steps if you want to send all content created in a Discussions Category in Cisco WebEx Social to a mailing list.

1. Click **Edit** in the Community Email application.
2. Ensure you are on the **Edit Community Email** tab.
3. Click on **Mailing Lists** in the left hand pane.
4. Click **Add a Mailing List**.
5. Enter the email address of the mailing list you wish to link.
6. Choose a Discussion Category to assign to the mailing list.
7. Click **Save**.

The mailing list is then added to the discussion category and starts to receive the content of all discussions and updates.

To add the Discussion Category to the mailing list

Take these steps if you want emails sent to a mailing list to be captured as content in a particular Discussions Category in Cisco WebEx Social.

1. Find the email address of the Discussions Category by following the instructions in [Obtain the Email Address of the Content, page 40](#).
2. Subscribe the email address to the mailing list. If you are not the mailing list administrator, provide the administrator of the mailing list with the email address of the Discussion Category.

Search

This section is organized as follows:

- [Search Options, page 45](#)

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:

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- **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:

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- 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"**

You can also create composite searches, and enter the terms in any sequence. For example, to search for document with the title *cisco collaboration* that also contains the word *social* anywhere in the body, enter: **title: "cisco collaboration" social**
- 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: **2011072**.
- 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


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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`

External Document Repository

If your System Administrator has set up an external Microsoft SharePoint 2007 or EMC Documentum repository for document management, you can add the External Document Repository application to your Home page, Profile page, or to any community page of which you are a community administrator. The steps are as follows:

1. Add the External Document Repository application and drop it to the desired location. For information about adding to your page, see [Add an Application, page 12](#).
You receive a message telling you to set up the application.
2. Hover your cursor over the application name, then click the gear icon  and select **Preferences**.
3. Enter values for only the following fields:
 - a. For SharePoint repositories:
 - **Workspace URL**—This information must be provided to you by your system administrator and presents the URL of the document library on the SharePoint server.
 - **Credentials to connect** (Required when “Basic” appears in the Authentication Mode field)—The username and password of your SharePoint account.

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Preferences

Repository Settings

Name	SharePoint Repository ▼
Type	SharePoint 2007
Authentication Mode	Basic
Workspace URL*	<input type="text" value="http://198.51.100.35/tp/tpDocLib"/>

This would be the URL to the document library to the external repository.

Credentials to connect

Username *	<input type="text" value="abrisson"/>
Password *	<input type="password" value="*****"/>

Save

Cancel

b. For EMC Documentum repositories:

- **User Workspace Path**—The path to your workspace, or default folder, in the repository. You can log in using the native client of the repository to view it. If you fail to provide a user workspace path, the root folder of the repository is used.
- **Credentials to connect**—The username and password of your EMC Documentum repository account.

Preferences

Repository Settings

Name	CMIS Repository ▼
Type	CMIS Provider
Authentication Mode	Basic
User Workspace Path	<input type="text" value="/docs/collaboration"/> ?

Credentials to connect

Username *	<input type="text" value="abrisson"/>
Password *	<input type="password" value="*****"/>

Save

Cancel

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4. Click **Save**.

Appendix

This chapter is organized as follows:

- [Accessibility Shortcuts in Cisco WebEx Social, page 50](#)
- [Multiple Chat Instances, page 50](#)
- [Details About Availability, page 52](#)
- [Content Visibility in Cisco WebEx Social, page 52](#)

Accessibility Shortcuts in Cisco WebEx Social

You can use the following keyboard shortcuts in Cisco WebEx Social:

Action	Keyboard Shortcut	Alternative Shortcut
Create a post	Ctrl+Shift+P	Alt+P
Ask a question (create a post maked as question)	Ctrl+Shift+Q	Alt+Q
Go to your Home page	Ctrl+Shift+H	Alt+H
Switch focus to the dock	Ctrl+Shift+B	Alt+B
Switch focus to the the first actionable element in the page body after the global navigation	Ctrl+Shift+T	Alt+T
Create an update	Ctrl+Shift+U	Alt+U

Multiple Chat Instances

This section includes these topics:

- [Cisco WebEx Social Availability Behavior when Using Cisco WebEx Social with Cisco Unified Presence, page 50](#)
- [Multi-Instance Behavior for Cisco WebEx Social Chat, page 51](#)

Cisco WebEx Social Availability Behavior when Using Cisco WebEx Social with Cisco Unified Presence

This section provides information about the Cisco WebEx Social availability behavior when used in a deployment that includes Cisco Unified Presence.

Be aware of the following:

- The user Chat availability (XMPP) and Cisco Unified IP Phone availability (SIP) use different channels of presence communication.
- The user Chat availability state is set manually from either Cisco WebEx Social or the WebEx Connect client.

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- The phone availability state is set on Cisco Unified Presence to change from Offline to Away when the phone toggles between off-hook and on-hook.

Cisco WebEx Social Availability Appearance while a User is on the Phone

Table 1 shows the Cisco WebEx Social availability status that a user (User B) sees in various situations when another user (User A) is on a Cisco Unified IP Phone.

Table 1 *Cisco WebEx Social Availability States when a User is on the Phone*

User A Cisco WebEx Social Availability Status	User A Cisco WebEx Social Availability Status that User B Sees in Cisco WebEx Social while User A is on a Phone Call
Available	Away
Do Not Disturb	Do Not Disturb
Away	Away
Offline	Away

Cisco WebEx Social Availability Change while a User Phone State Changes

Assume that, while on a Cisco Unified IP Phone call, User A changes his or her Cisco WebEx Social status from Available to Offline, and that User B is on a Cisco Unified IP Phone call and has an status of Available in Cisco WebEx Social.

As soon as the User A Cisco WebEx Social status changes to Offline, User A sees the User B status as offline in Cisco WebEx Social (regardless of the User B phone status). User B sees the User A status as Away in Cisco WebEx Social.

Similarly, if a user is not signed in to Cisco WebEx Social and is on a Cisco Unified IP Phone call, the Cisco WebEx Social status for this user appears as Away.

Cisco WebEx Social Availability Appearance when a User Changes Phone State

If User A is on the phone but not signed in to Cisco WebEx Social, the Cisco WebEx Social status of this user appears as Away to other users who are Available in Cisco WebEx Social. When User A hangs up the phone, other users then see the User A Cisco WebEx Social status as offline.

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.

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Details About Availability

This sections contains the following topics:

- [Sticky Availability Status, page 52](#)
- [Offline State, page 52](#)
- [Not Available, Do Not Disturb and Setting Availability Using External Client, page 52](#)

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 Library 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.

**Note**

Sticky status does not function with devices outside of Cisco WebEx Social. For example, if you make a call on a Cisco Unified IP Phone, your availability state that appears in your Cisco WebEx Social window is not updated.

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.

Not Available, Do Not Disturb and Setting Availability Using External Client

If your System Administrator has set up Cisco WebEx Social to use an external chat client you are not able to change your availability from within Cisco WebEx Social. Instead, it reflects you external client availability.

If you have not signed in to the external client, your Cisco WebEx Social availability is set to “Not Available” until you start your external chat client. Note that this state is seen by others as Do Not Disturb. You are not able to receive chat messages in this state. To start receiving them, sign in to your external chat client.

After you sign in to your external chat client, your status in Cisco WebEx Social is automatically set to “Available” (or whatever status you selected in the external chat client) and other Cisco WebEx Social users are able to chat with you using [Instant Messaging with Click to Chat](#).

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

DRAFT--CISCO CONFIDENTIAL**Table 2** *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.	All members of the restricted community.
Hidden	All members of the Hidden Community.	All members of the hidden community.

Table 3 describes which users can perform various actions for the content types within communities.

Table 3 *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.

DRAFT--CISCO CONFIDENTIAL**Table 3** *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
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 2 .	See Table 2 .
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.
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 2 .	See Table 2 .
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 2 .	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 2 .	See Table 2 .

DRAFT--CISCO CONFIDENTIAL**Table 3** *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
Child post of a wiki application.	All members of the community.	All members of the community.	All members of the community.	See Table 2 .	See Table 2 .
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.
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 2 .	See Table 2 .
Web content in your Profile page.	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 2 .
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.

DRAFT--CISCO CONFIDENTIAL**Table 3** ***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
Discussions.	All members of the community.	All members of the community.	<p>Author of the discussion post, and the community owners and administrators can edit.</p> <p>In addition, owners and administrators of the community can move and delete threads and can ban users from participating in the community message board.</p>	See Table 2 .	See Table 2 .

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.

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