SalesCenter

Getting Started Guide

This SalesCenter™, powered by WebEx™, guide provides basic information about using SalesCenter's many features. It also gives step-by-step procedures for tasks that you may be interested in performing with SalesCenter, such as scheduling a meeting, sharing information, housekeeping and management tasks (for example, muting and unmuting microphones.)

For more in-depth detail about a particular feature, consult the online Help on your SalesCenter Web site.

Set Up Tasks

OBTAINING A USER ACCOUNT

Once you obtain a user account, you can host meetings using your meeting service. You do not need to obtain a user account to attend meetings.

You can obtain a user account in one of two ways:

- The site administrator for your SalesCenter Web site can create a user account for you.
- If your site administrator has made the signup feature available, you can sign up for an account on your SalesCenter Web site at any time.

To obtain a user account using the signup feature:

1. Go to your SalesCenter Web site. Your address for your site is usually in the following format: <your_company> .webex.com
2. On the navigation bar, expand Set Up.
3. Click New Account.
4. Provide the required information, and then click Sign Up Now.

LOGGING IN AND OUT

You must log in to your SalesCenter Web site to schedule and start your meetings and access your account features. Your site administrator provides you with your user name and default password for your account.

Note: You do not need to log in to your site to attend a meeting, unless the meeting host specifies that all attendees must have a user account.

This option is available only if your site has the self-registration feature.

To log in to SalesCenter:

1 Go to your SalesCenter Web site. The address for your site is usually in the following format: <your_company>.webex.com
2 On the navigation bar, click Log In.
3 Provide your user name and password.
4 Optional. To automatically log in to SalesCenter whenever you access it, click the Remember user name and password check box.
5 Click Log In.

To log out from SalesCenter:

To log out from your SalesCenter Web site, on the navigation bar at the top of the page, click Log Out.

IF YOU HAVE FORGOTTEN YOUR USER NAME OR PASSWORD

If you have forgotten either your user name or password, you can quickly obtain it.

To obtain your user name or password:

1 On the navigation bar, click Log In.
2 On the Log In page, click Login Assistance.
3 Provide your email address, and then click OK.

Your MeetingCenter Web site immediately sends you an email message containing your account information.

SETTING UP MEETING MANAGER FOR WINDOWS

Meeting Manager is a software program that you install on your computer and use when participating in a meeting. Meeting Manager provides the options that you use to share information—such as presentations and applications—send chat messages, send and receive live video, take notes, record a meeting, and so on.

The Meeting Manager software provides the work space for your meeting.

SYSTEM REQUIREMENTS

Your system must meet these requirements for installing Meeting Manager for Windows:

+ Microsoft Windows 95, 98, ME (Millennium Edition), XP, NT, 2000, or Windows Server 2003
+ Intel or AMD 400 MHz processor
+ 128 MB RAM (64 MB recommended)
+ Microsoft Internet Explorer 5 or 6, Netscape 7, Mozilla 1.6, or Firefox 1.0
+ JavaScript and cookies enabled on the Web browser
+ 56K or faster Internet connection

If you want to share a presentation that was created using Microsoft® PowerPoint 2002 for

Windows XP, an Intel Celeron or Pentium 500 MHz or faster processor is highly recommended. However, you cannot share other types of presentation or documents unless you either:

+ Sign in to your computer as an administrator before starting or joining a meeting for the first time, or

+ Have a Windows NT or 2000 administrator set up your computer for you.

Subsequently starting or joining an event does not require administrator privileges.

To set up Meeting Manager for Windows:

1. On the navigation bar, expand Set Up, and then click Meeting Manager. The Set Up page appears.

2. Click Set Up.

3. If a security dialog box appears, do one of the following:
   - If you are installing Meeting Manager on Microsoft Internet Explorer, click Yes.
   - If you are installing Meeting Manager on Netscape Navigator, click Grant.
   - Setup continues. A progress message box appears, indicating the progress or setup.
   - Once setup is complete, the Setup Complete page appears.

4. Click OK.

You can now start, schedule, or join a meeting.

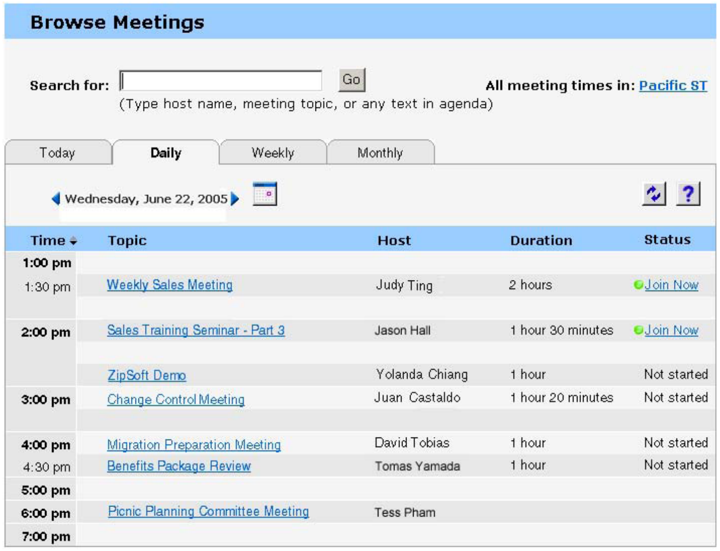
BROWSE MEETINGS PAGE (MEETING CALENDAR)

The Browse Meetings page includes a meeting calendar, which provides daily, weekly, and monthly views of all scheduled or in-progress meetings on your site, as well as a list of all meetings being hosted on the current date.

Using the calendar, participants can:

+ Search for a meeting
+ Obtain information about a meeting
+ Register for a meeting
+ Join a meeting

The following figure shows the *Daily* view of the Browse Meetings page.

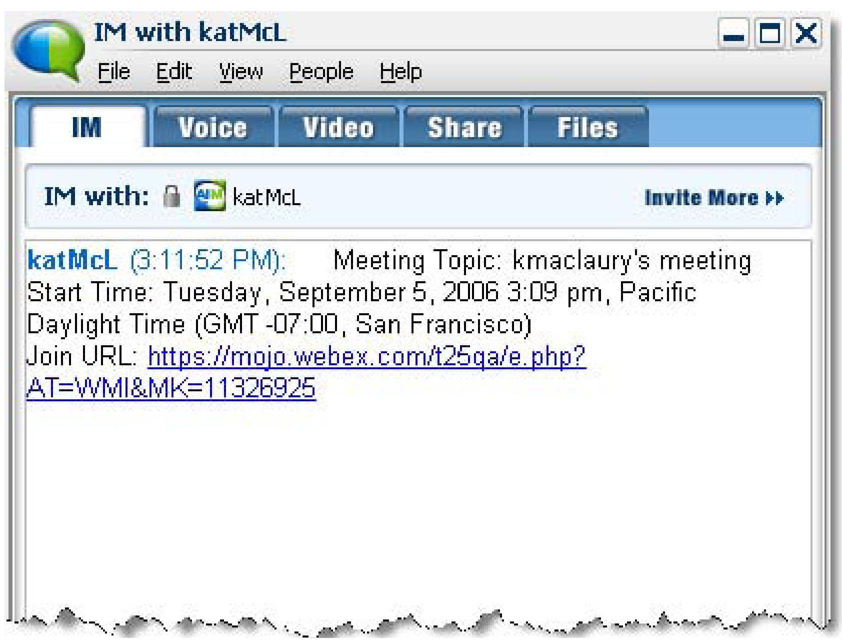


JOINING A MEETING

You can join a meeting in a number of ways. The simplest and quickest is by clicking the meeting URL, which the host can send you in an instant message or paste into an email message.

To join a meeting from an IM message:

1 From the instant message window, click the link to join the meeting.



2 On the Meeting Information page, click *Join Now*.

3 If the Log In page appears, type your user name and password in the *name* and *Password* boxes, respectively, and then click *Log In*. This page appears

only if the meeting host requires you have a user account to attend the meeting.

4 On the Join Meeting page, enter the requested information.

5 Click *OK*.

The Meeting window appears.

To join a meeting from an invitation email message:

If you received an email invitation to a meeting, you can join the meeting by clicking a link in the invitation.

1 Open your email invitation, and then click the link.

2 On the Meeting Information page that appears, click *Join Now*.

3 If the Log In page appears, type your user name and password in the *User name* and *Password* boxes, respectively, and then click *Log In*. This page appears only if the meeting host requires that you have a user account to attend the meeting.

4 On the Join Meeting page, provide the required information. The Meeting window appears.

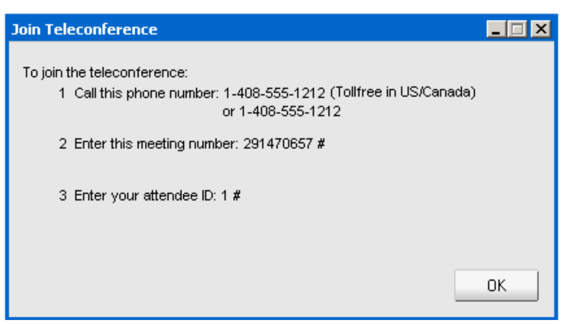
√ **TIP** A meeting invitation also includes a link that you can click to add the meeting to any calendar program that supports the iCalendar format, such as Microsoft Outlook or Lotus Notes.

You can also join a meeting directly from your SalesCenter Web site or from the host's Personal Meeting Room page.

To join a meeting using a meeting number:

If you do not see the meeting listed, you can ask the meeting host to provide the meeting number. On your SalesCenter Web site, select *Unlisted Meeting* rom the left navigation bar and enter the meeting number in the text box.

Once you join a meeting, instructions for joining the voice conference automatically appear on your screen. This illustration shows sample instructions for a call-in teleconference:



Notes

- To participate in a meeting, you must use Meeting Manager. If you have not yet set up Meeting Manager on your computer, you can do so before joining a meeting to avoid a delay. Otherwise, once you join a meeting, your SalesCenter Web site automatically sets up Meeting Manager on your computer. For more information about setting up Meeting Manager on your computer, see “Setting up Meeting Manager for Windows” on page 3.

- You need *not* have a user account or log in to your site to join a meeting, unless the host has specified that all meeting participants must have a user account.

Scheduling Tasks

TYPES OF MEETINGS

Using SalesCenter, you can set up:

- *Scheduled* meetings (using either the Quick Scheduler or the Advanced Scheduler)

- *One-Click* meetings. When setting up any type of meeting, you can specify that it is either *listed* or *unlisted*

Meeting Type	Description
Scheduled (using Quick Scheduler)	A meeting that you schedule for a specific date and time. You can also: ■ Specify voice conferencing options ■ Send invitations to participants ■ Set up and include an integrated voice conference in your meeting
Scheduled (using the Advanced Scheduler)	In addition to the options you set up using the Quick Scheduler, the Advanced Scheduler allows you to: ■ Specify a recurrence pattern for the meeting ■ Require attendees to register for a meeting, which lets you collect information from attendees and enhances the security of your meeting ■ Choose which default meeting privileges you want attendees to have ■ Choose which meeting options you want to turn on or off, such as chat, notes, video, and so on ■ Let attendees join the meeting before its scheduled starting time—that is, before you start it ■ Choose a presentation or document to share automatically once a participant joins the meeting
One-Click	An instant meeting that you set up in advance, using the One-Click Meeting Setup Wizard. When setting up a One-Click Meeting, you can: ■ Specify voice

	conferencing options ■ Choose which default meeting privileges you want attendees to have ■ Choose which meeting options you want to turn on or off, such as chat, notes, video, and so on To start a One-Click Meeting, you must first install the WebEx One-Click program. You can start the meeting at any time, as often as you want from the WebEx One-Click panel on your computer's desktop, or by clicking a One-Click Meeting shortcut on your computer.
Listed	A meeting that appears on your SalesCenter Web site's meeting calendar and your Personal Meeting Room page. Because these pages are publicly accessible, visitors can view lists of meetings on these pages.
Unlisted	A meeting that does not appear on any pages on your SalesCenter Web site. To join an unlisted meeting, attendees must provide the meeting number. Your meeting service automatically generates a unique meeting number for each meeting that you host.

SCHEDULING A MEETING

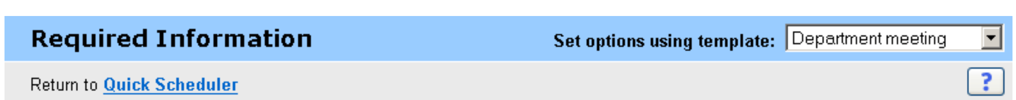
Whether you want to start your meeting right now, or schedule it for a time in the future, SalesCenter provides an easy-to-use tool to set it up. You can even schedule a teleconference and invite your colleagues to join by phone.

USING THE QUICK SCHEDULER

The one-page Quick Scheduler is a snap to use. You have your meeting scheduled in no time.

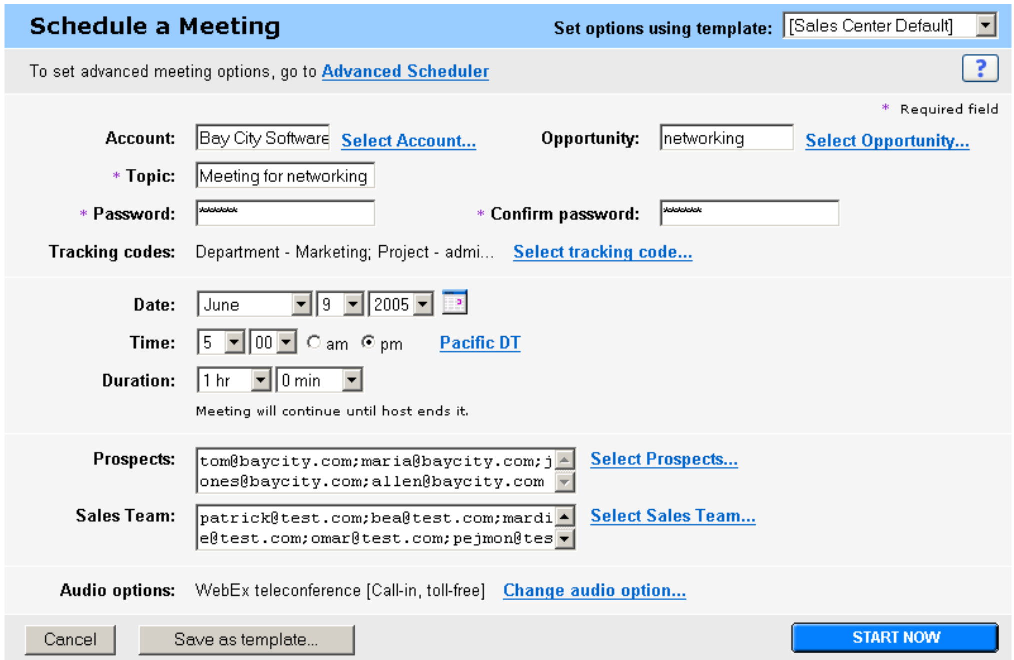
To schedule a meeting using the Quick Scheduler:

1. Log in to your SalesCenter Web site.
2. On the left navigation bar, click *Host a Meeting> Schedule a Meeting*. Depending on how your administrator set up your site, you see the *Advanced Scheduler* or the *Quick Scheduler*.
3. If you see the *Advanced Scheduler*, click the link in the title bar to view the *Quick Scheduler.*



4. On the Quick Scheduler page, enter the details about your meeting.

For details, see *Quick Scheduler options*, next.



5 Schedule or start your meeting.

If you scheduled the meeting time for the current time, you see the *Start Now* button. If your meeting is set for a time in the future, you see the *Schedule Meeting* button.

Scheduled meetings display on your meeting calendar and personal meeting page.

Quick Scheduler Options

Only a few pieces of information are required; you can set as many other options as you want.

Use this option to…	To…
Choose a Template/ Set options using	Select a template and use the settings saved in that template for this meeting. You can save time by using a template that includes the list of attendees you want to invite, a presentation you want to show before the meeting starts, and other options you have used in a previous meetings and saved as a template. For more details about creating and editing templates, consult online Help.
Account	Enter the name of the account associated with this meeting. *Example:* Your meeting is with managers at Bay City, Inc. (a software company) so you might type `Bay City` as the account name. You can type a new account name, or select an account from the list.
Opportunity	Enter the name of the opportunity associated with the account you have selected. *Example:* You have scheduled the meeting as an opportunity to introduce your equipment and services to a division of Bay City. You might type `Western Sales Division`

	as the opportunity name. You can type a new opportunity name or select one from the list
Topic	Enter the topic or a name for the meeting.
Password Confirm password	Require participants to enter the password you set to join your meeting. Your site may require that all passwords comply with security criteria, such as a minimum length and a minimum number of letters, numbers or special characters. A password: ■ Can contain a maximum of 16 characters. ■ Cannot contain spaces or any of the following characters: \ ` " / & < > == [ ] Each participant that you invite to your meeting receives an invitation email message that includes the password, unless you request that passwords do not appear in email invitations.
Tracking codes	Identify your department, project, or other information that your organization wants to associate with your meetings. Tracking codes can be optional or required, depending on how your site administrator set them up. If your site administrator requires you to select a code from a predefined list, a list of codes appears. Select a code from the list on the left. Then do *one* of the following in the box on the right: ■ If a list of codes appears, select a code from the list. ■ Type a code in the box.
Date	Set the date you want the meeting to occur. Select the month, day, and year in the drop-down lists. Or, you can click the **Calendar** icon, and then select a date.
Time	Set the meeting's starting time and the time zone. To select another time zone, click the time zone link. **Important** The time zone you select does not affect the time zone setting for the meeting calendar on the Browse Meetings page. You and each attendee can select the time zone for your view of the calendar independently, using the **Your time zone** option on the Preferences page. To access this page, on the navigation bar, click **Set Up > Preferences**
Duration	Enter the length of time you estimate that the meeting will continue. The meeting does not end automatically after the duration that you set.
Prospects	Enter the email addresses of the prospects you want to invite to your meeting. You can type the addresses, separating them with a comma or semicolon or you can click **Select Prospects** to choose prospects from your address book.

Sales Team	Enter the email addresses of the sales team members you want to invite to your meeting. You can type the addresses, separating them with a comma or semicolon or you can click **Select Sales Team** to choose team members from the list of registered users.
Audio options	The default settings display. To select a different option, click **Change audio option.**

USING THE ADVANCED SCHEDULER

If you use the Advanced Scheduler, you can specify several options to provide security for and to customize your meeting.

You can click the *Start Now* button at any time to start your meeting. If you have questions about the information requested on a page, click the *Help* button, located in the upper-right corner of the page, for details.

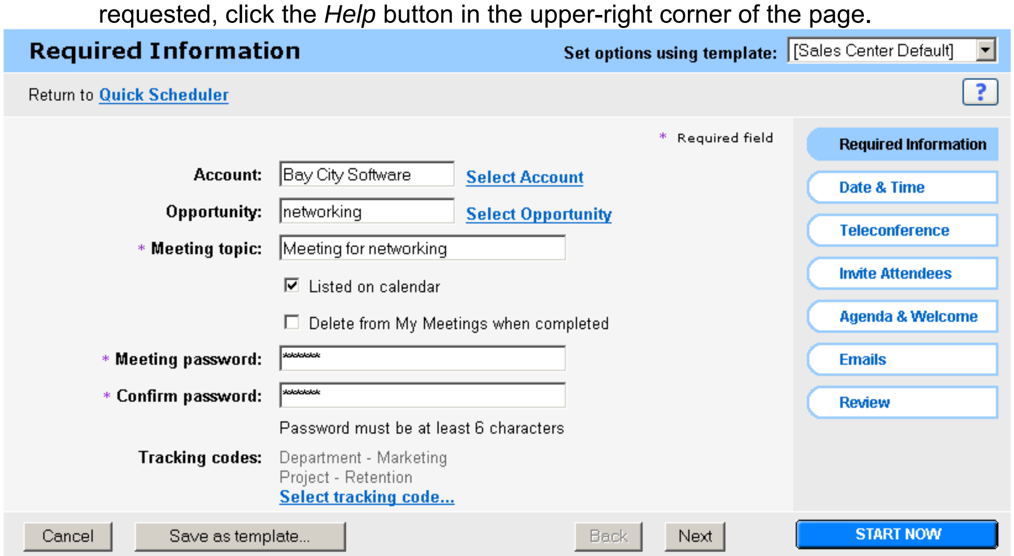
To schedule a meeting using the Advanced Scheduler:

1. Log in to your SalesCenter Web site.

2. On the left navigation bar, click *Host a Meeting*> *Schedule a Meeting*. Depending on how your administrator set up your site, you see the *Advanced Scheduler* or the *Quick Scheduler*.

3. If you see the *Quick Scheduler*, click the link in the title bar to view the *Advanced Scheduler.*

4. On the *Required Information*. page, type the details that are required. You can choose other options, such as removing this meeting from your meeting calendar after the meeting is over. For an overview of this page and the information requested, click the *Help* button in the upper-right corner of the page.



Click *Next* to move to the next page in the scheduler. Click *Start Now* to start this meeting immediately.

5. Start your meeting or add more scheduling details.

   - To start your meeting, click *Start Now*.

- To add more options, click *Next* or click a link to another page in the scheduler. Then click *Start Now* or *Schedule Meeting*.

SETTING UP AND STARTING A ONE-CLICK MEETING

Using the One-Click Meeting Setup Wizard, you set up an unscheduled meeting, which you can start at any time, as often as you want. To start your One-Click Meeting, you can use WebEx One-Click panel or one of your One- Click shortcuts, which appear on:

+ Your Web browser toolbar (Internet Explorer only)
+ The *WebEx* menu in Microsoft Office applications
+ The right-click menu for files and applications on your desktop

To set up a One-Click Meeting:

1. Log in to your SalesCenter Web site.
2. On the top navigation bar, click *My WebEx*.
3. Click the *One-Click Meeting* tab.
4. Use the One-Click Meeting Setup Wizard to specify information about the meeting.
5. Click *Finish*. The Download WebEx One-Click screen appears.
6. Click *Download WebEx One-Click*.
7. Save the WebEx One-Click installation program to your computer, and then run it.
8. Follow the instructions in the installation program.

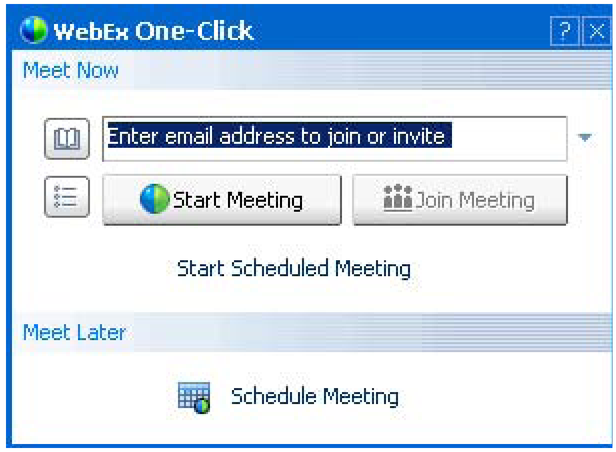
To start a One-Click Meeting using the WebEx One-Click panel:

1. Click the *WebEx One-Click* icon on either your desktop or taskbar.

Desktop Icon

Taskbar Icon

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

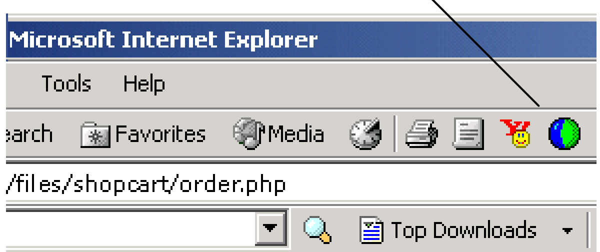


To start a One-Click Meeting using a One-Click shortcut:

Click one of these One-Click Meeting shortcuts, which the WebEx One-Click installation program set up on your computer:

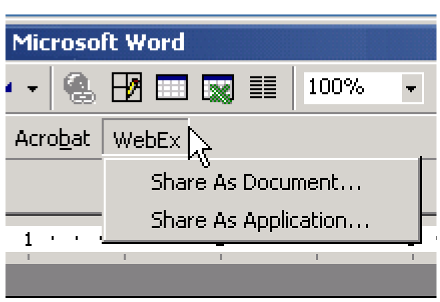
+ Web browser button

A **Start One-Click Meeting** button appears on the toolbar on your Internet Explorer Web browser.



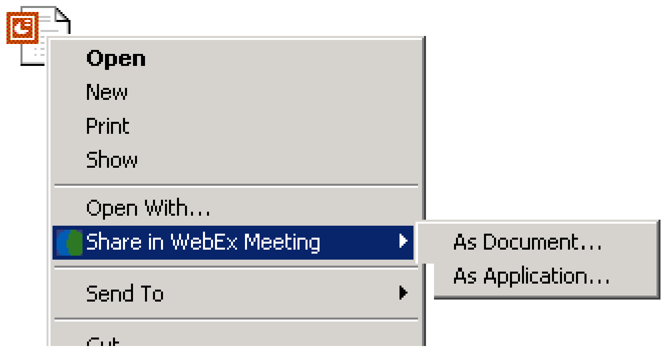
WebEx menu in Microsoft Office applications

One-Click Meeting commands appear on a **WebEx** menu in your Microsoft Office applications. These commands let you automatically share in a meeting the application or any document that is open in the application.



Shortcut (right-click) menu for document files and applications

One-Click Meeting commands appear on the shortcut menu when you right-click the icon for *any* application or document file. These commands let you automatically share the application or document in the meeting.



To start a One-Click Meeting:

Click one of the *One-Click Meeting* shortcuts that you downloaded when setting up the meeting.

To edit a One-Click Meeting:

1. Log in to your SalesCenter Web site.
2. On the navigation bar, click *My WebEx*.
3. On the My Meetings page, click *One-Click Meeting*.
4. Use the One-Click Meeting Setup Wizard to specify new information.

Sharing – the Core of your Meeting

SHARING OPTIONS

SalesCenter provides you with a variety of options for sharing information in a meeting. The following table describes the advantages and disadvantages among these options.

Sharing Option	Advantages	Disadvantages
Presentation and document sharing	■ Is faster and more bandwidth efficient than application or desktop sharing. ■ Is ideal for sharing presentations or documents that you do not want to edit during the meeting. ■ Lets you and participants annotate content.	■ Does not let you edit the content during the meeting.

Application sharing	■ Lets you edit the content of any presentation or document open in the application. ■ Lets you grant attendees control of the application. ■ Is ideal for software demonstrations. ■ Lets you and attendees annotate the application and documents that are open in it.	■ Requires more bandwidth than presentation or document sharing.
Desktop sharing	■ Lets you quickly share multiple applications at once. ■ Lets you show any part of your desktop, including file directories. ■ Lets you grant attendees control of your desktop, access files, and run applications. ■ Lets you and attendees annotate your desktop and any applications.	■ Requires the most bandwidth among sharing options. ■ Lets an attendee with remote control access any part of your computer and modify any files, which may be a security concern.
Web browser sharing	■ Lets you guide attendees to various Web pages and sites on the Web. ■ Lets you grant attendees control of your Web browser. ■ Lets you and attendees annotate Web pages.	■ Does not display media effects or transmit sounds on Web pages. ■ Does not let attendees interact with Web pages independently.
Web content sharing	■ Displays media effects and transmits sounds on Web pages. ■ Lets attendees interact with Web pages independently.	■ Does not let you guide participants to other Web pages.

SHARING DOCUMENTS AND PRESENTATIONS

You can share one or more presentations or documents you have created using word processing, presentation, or graphics programs. Document and presentation sharing is ideal for presenting information that you do not need to edit during the meeting, such as a slide presentation.

Attendees view the shared document or presentation in their content viewers. They do not need to have the applications used to create the documents available on their computers. Attendees can also view any animation and transition effects on shared Microsoft PowerPoint slides.

Once a meeting starts, you can open a document or presentation to share. You do not need to select it or “load” it before the meeting.

While sharing a document or presentation, you can:

- Make annotations

+ Use a pointer to emphasize text or graphics
+ Save it to a file
+ Print it
+ Display it at various magnifications, in miniature (thumbnails), and in a full-screen view
+ Synchronize all participants' displays with the display in your content viewer

At any time during a meeting, you can grant attendees privileges that allow them to annotate, save, print, and display different views of shared presentations or documents.

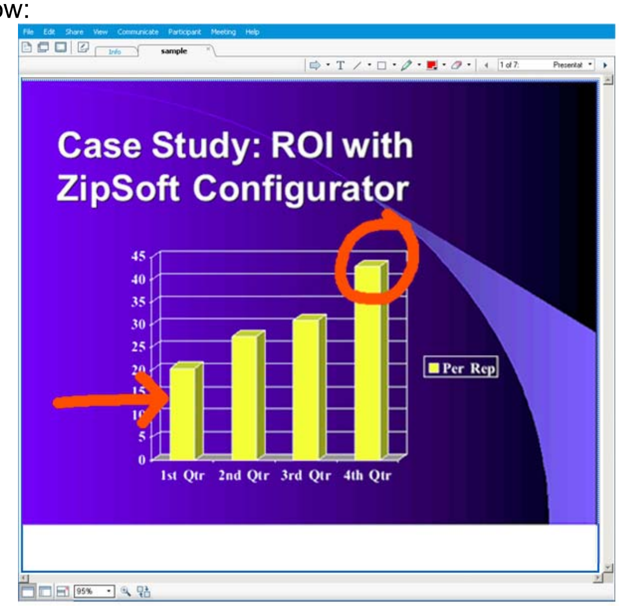
To share a document or presentation:

1. On the *Share* menu, choose *Presentation or Document*. The Share Presentation or Document dialog box appears.

2. Select the document or presentation that you want to share.

3. Click *Open.*

The shared document or presentation appears in the content viewer, as in the example below:



ACCESSING TOOLS FOR SHARING

As you start sharing documents and applications during your meeting, tools are available at your fingertips.

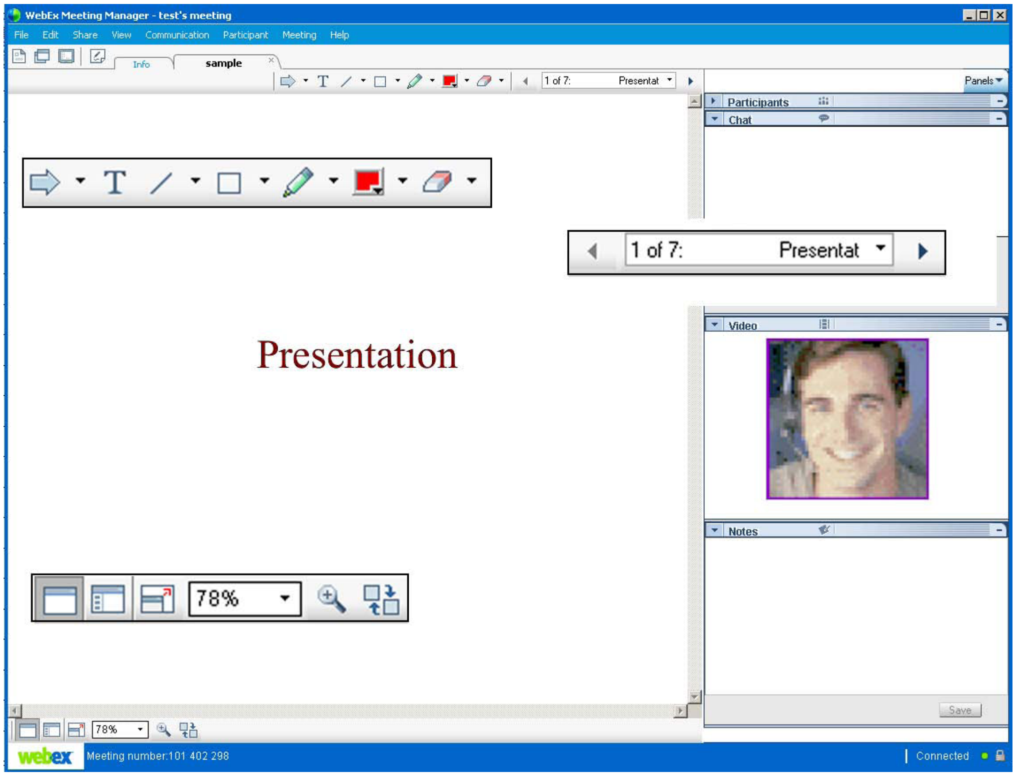
In this example, the host has opened a presentation to share with meeting participants.

Notice the changes in the window. You now have access to:

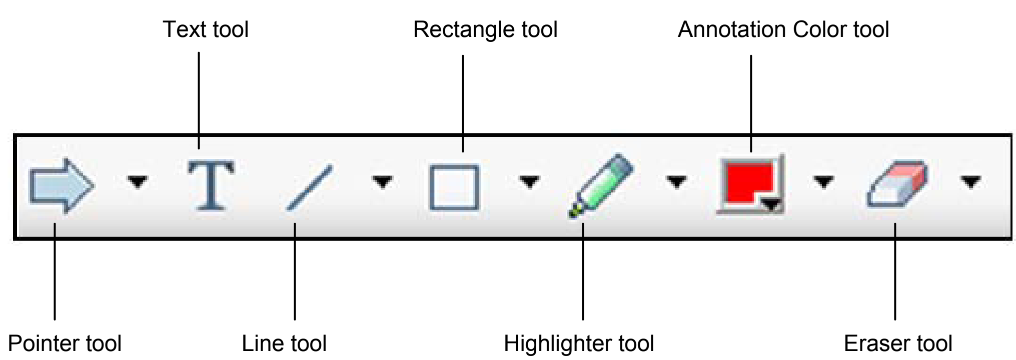
+ Annotation tools for highlighting and referring to elements in the presentation or application you are sharing

+ View tools for displaying document and presentations in different ways, such as showing thumbnails of the pages

+ Previous and Next buttons, for moving around in a document



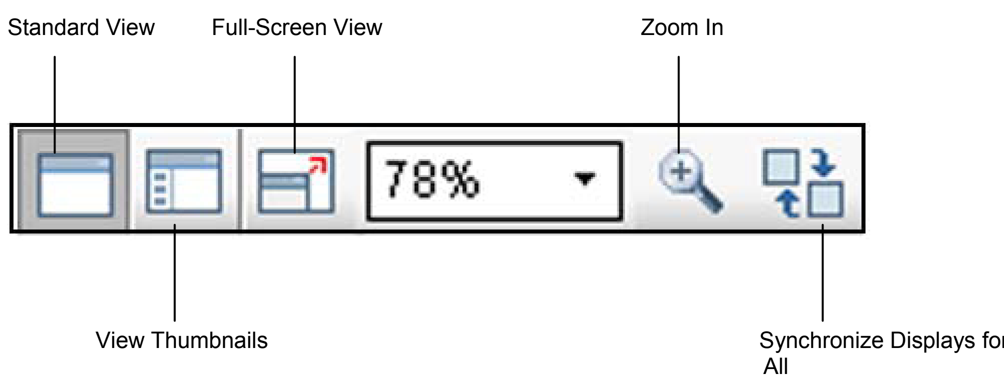
ANNOTATION TOOLS



Tool	Description
Pointer	Lets you point out text and graphics on shared content. The pointer displays an arrow with your name and annotation color. To display the laser pointer, which lets you point out text and graphics on shared content using a red "laser beam," click the

	downward-pointing arrow. Clicking this button again and then clicking the Close button turns off the pointer tool.
Text	Lets you type text on shared content. Attendees can view the text you have entered after you type it and click your mouse in the content viewer, outside the text box. To change the font, on the **Edit** menu, choose **Font**. Clicking this button again and then clicking the Close button turns off the text tool.
Line	Lets you draw lines and arrows on shared content. For more options, click the downward-pointing arrow. Clicking this button again and then clicking the Close button turns off the LIne tool.
Rectangle	Lets you draw shapes, such as rectangles and ellipses on shared content. For more options, click the downward-pointing arrow. Clicking this button again and then clicking the Close button turns off the Rectangle tool.
Highlighter	Lets you highlight text and other elements in shared content. For more options, click the downward-pointing arrow. Clicking this button again and then clicking the Close button turns off the Highlighter tool.
Annotation Color	Displays the Annotation Color palette, Select a color to annotate shared content. The Annotation Color palette closes.
Eraser	Erases text and annotations or clears pointers on shared content. To erase a single annotation, click it in the viewer. For more options, click the downward-pointing arrow. Clicking this button again and clicking the Close button turns off the eraser tool.

VIEWTOOLS



Tool	Description
Standard View/ View Thumbnails	Clicking **Standard View** displays the shared content as you would normally view it. To display thumbnails, or miniatures, of shared pages, slides, or whiteboards to the side of the content, click **View Thumbnails**. This tool helps you locate a page or slide quickly. Click **Standard View** to return to normal viewing of the shared content.
Full-Screen View	Displays shared content in a full-screen view. Helps you to ensure that participants can view all activity on your screen. Also helps to prevent participants from viewing or using other applications on their screens during a presentation. Click **ESC** to return to the content viewer.
Zoom In/ Zoom Out	Lets you display shared content at various magnifications. Click this button, and then click the page, slide, or whiteboard to change its magnification. For more magnification options, click the downward-pointing arrow.
Synchronize Displays for All	For presenters, synchronizes all participants' displays with your display. Helps to ensure that all participants are viewing the same page or slide, at the same magnification, as in your display.

Sharing whiteboards

Sharing a whiteboard allows you to draw objects and type text that all attendees can see in their content viewers. You can also use a pointer to emphasize text or graphics on a whiteboard.

While sharing whiteboard, you can:

- Display it at various magnifications, in miniature (thumbnails), and in a full screen
- View
- Save it
- Print it
- Synchronize attendees' displays with the display in your content viewer

If you grant annotation privileges to attendees, you and attendees can draw and type on a whiteboard simultaneously. You can also allow attendees to save, print, and display different views of shared whiteboards.

To share a whiteboard:

On the *Share* menu, choose *Whiteboard***.**

When sharing a whiteboard:

You can add multiple pages to a shared whiteboard. For details, consult the users' guide or online Help.

You can share multiple whiteboards. For each whiteboard that you share, Meeting Manager creates a new *Whiteboard* tab in the content viewer.

SHARING MULTIMEDIA IN A SA.ES CENTER MEETING

During a meeting, you can share the following types of media files in the content viewer:

- WebEx Recording Format (WRF) files
- video files
- audio files
- Flash movie and interactive Flash files
- Web pages

You can share media files in *either* of two ways:

In a Microsoft PowerPoint presentation— You can share media files that play on Microsoft PowerPoint slides. Using the WebEx Universal Communications Toolkit, a plug-in for Microsoft PowerPoint, you can insert UCF media objects into your slides. Depending on the options you choose in the toolkit, the media object can either

- link to a media file that resides on your computer, another computer on your local network, or a remote server
- contain a media file as part of your presentation file

You can download the Universal Communications Toolkit from your meeting service Web site. For information about using the Universal Communications Toolkit, refer to the guide *Getting Started with WebEx Universal Communications Toolkit*, which is available on your SalesCenter Web site.

As a standalone file—You can share a media file directly in the content viewer. Meeting Manager creates a UCF media object for the file automatically, which appears in the content viewer.

A UCF media object contains options and controls that you can use to display or manipulate its associated media file.

For more information about how UCF works, consult the SalesCenter User’s Guide or online Help.

SHARING SOFTWARE

When you share software, attendees can follow all actions that you take. You can also annotate the software, or let an attendee annotate it or control it remotely.

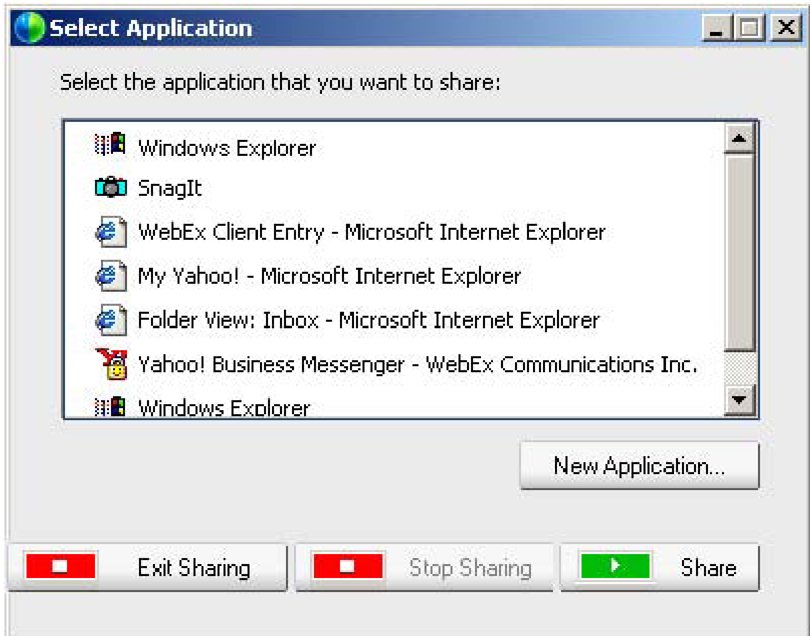
You can share these types of software with attendees:

- Applications on your computer
- Your computer’s desktop
- Web browsers
- Remote computers, if you installed the Access Anywhere Agent on the computer

To share an application:

1. On the *Share* menu, choose *Application*.

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



2 Optional. To view a list of applications that are installed on your computer, but not currently running, click *View Application.* Use this option to locate an application you want to share, but are not currently using.

3 In the list, select the application that you want to share.

4 Click *Share*. Your application appears in a sharing window on attendees' screens.

LETTING AN ATTENDEE REMOTELY CONTROL SHARED SOFTWARE

While sharing the following types of shared software, you can let an attendee control it remotely:

+ application
+ desktop
+ Web browser

An attendee who has remote control of shared software can interact with it completely. While an attendee is remotely controlling your shared software, your mouse pointer is inactive. At any time, however, you can reassume control of a shared application and regain use of your mouse pointer.

While you are sharing software, any attendee can send a request to control the software remotely. You can then grant control to the attendee. Alternatively, you can automatically grant control of shared software to any attendee who requests remote control.

You can stop an attendee from remotely controlling shared software at any time.

To let an attendee remotely control shared software:

1 Do *either* of the following:

On the title bar of a window that you are sharing, on the *Sharing* menu, point to *Allow to Control Remotely*.

In the lower-right corner of your computer's desktop, on the *Sharing* menu, point to *Allow to Control Remotely*.

2 Select the name of the attendee whom you want to control the software.

SHARING YOUR DESKTOP

Desktop sharing lets you show all meeting attendees your computer's entire desktop—including any applications and windows that are currently open— and all the actions that you take with your desktop.

Desktop sharing can be useful for technical support. For example, you can allow a technical support representative to access your computer and fix a problem as you watch.

While sharing your desktop, you can:

+ Control attendees' views of your desktop.
+ Annotate your desktop, using a highlighter tool.
+ Let an attendee control your desktop remotely. For example, you can let an attendee edit a document on your computer.
+ Let an attendee annotate your desktop remotely.

To share your desktop:

On the *Share* menu, choose *Desktop*.

Your desktop appears in a sharing window on attendees' screens.

To allow an attendee to control your desktop remotely:

1 On the title bar of an application you are sharing, on the Sharing menu, point to *Allow to Control Remotely*.

2 Select an attendee to control your desktop.

SHARING A REMOTE COMPUTER

Remote computer sharing lets you show all meeting attendees the computer's entire desktop or specific applications on it, depending on how you set up the remote computer, and all actions that you take with the computer.

Remote computer sharing can be useful if you want to show attendees an application or file that is available only on that computer.

You can share a remote computer during a meeting for which you are the presenter, if:

- You have installed the Access Anywhere Agent on the remote computer.
- You logged in to your SalesCenter Web site before joining the meeting, if you are not the original meeting host.

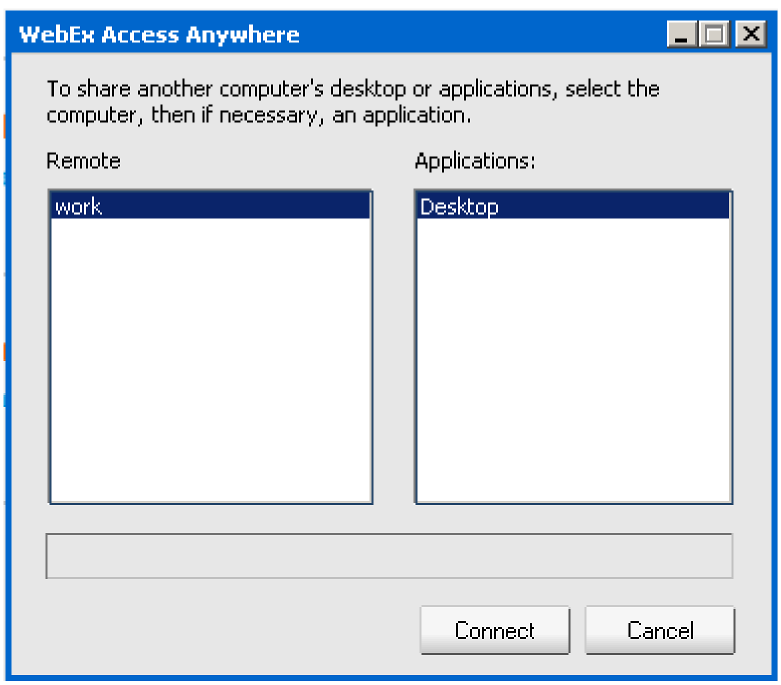
For information about setting up a computer so you can access it remotely, refer to the *Access Anywhere User's Guide*.

To share a remote computer:

If you have already set up a computer for Access Anywhere, you can share the computer during a meeting.

1 On the *Share* menu, choose *Remote Computer*.

The Access Anywhere dialog box appears.



2 Under *Remote*, select the computer that you want to share.

3 Under *Applications,* select an application that want to share.

If you set up the remote computer so you can access its entire desktop, the option *Desktop* appears under Applications.

4 Click *Connect.*

Depending on the method of authentication that you specified when setting up the computer for Access Anywhere, *one* of the following occurs:

- If you chose access code authentication, a dialog box appears, in which you must provide the access code that you specified when setting up the remote computer.

- If you chose phone authentication, you receive a phone call at the number that you specified when setting up the remote computer.

5 Do *one* of the following:

- If you chose access code authentication, type your access code in the box, and then click *OK*.

- If you chose phone authentication, provide your pass code by following the voice instructions.

Notes

+ If you are not the original meeting host, you must log in to your SalesCenter Web site before joining a meeting in which you want to share a remote computer. If you are already in a meeting, but did not log in to your site, you must leave the meeting, log in to your site, and then rejoin the meeting.

+ If a password-protected screen saver is running on the remote computer, your meeting service automatically closes it once you provide your access code or pass code.

+ If the remote computer is running Windows NT or 2000, and you must log in to the computer, send a *Ctrl+Alt+Del* command to the computer.

+ If you set up the remote computer so you can access multiple applications, you can share additional applications simultaneously.

TIPS FOR SHARING SOFTWARE

These tips can help you share software more effectively:

+ To improve the readability of shared software, attendees can use the sizing options on the *View* menu.

+ To improve the quality of attendees' views of a shared software, ensure that both your monitor display and attendees' monitor displays are set to the same color depth for example, 16-bit color.

+ *Application sharing only:* To save time during a meeting, begin sharing one or more applications before the meeting's starting time, and then minimize their windows. At the appropriate time during the meeting, you can then quickly begin sharing an application by restoring its window, without waiting for the application to start.

- To improve the performance of software sharing, close all applications that you do not need to use or share. Also, close any applications that use bandwidth, such as instant messaging or chat programs, and programs that receive streaming audio or video from the Web.

- *Application and Web browser sharing only:* Avoid covering a shared application or Web browser with another window on your computer's desktop. Doing so prevents attendees from viewing the area of the application or browser that the other window covers. Instead, a crosshatched pattern appears in the covered area on attendees' screens.

- You can switch your display between shared software and the Meeting window. To conserve bandwidth, pause software sharing before you return to the Meeting window, and then resume sharing once you return to the shared application.

- Use a dedicated, high-speed Internet connection when sharing software. Attendees using dial-up Internet connections may notice a delay in viewing or controlling shared software. If you want to share a Microsoft Word, Excel, or other document, you can improve the meeting experience for these attendees by using document sharing instead of application sharing.

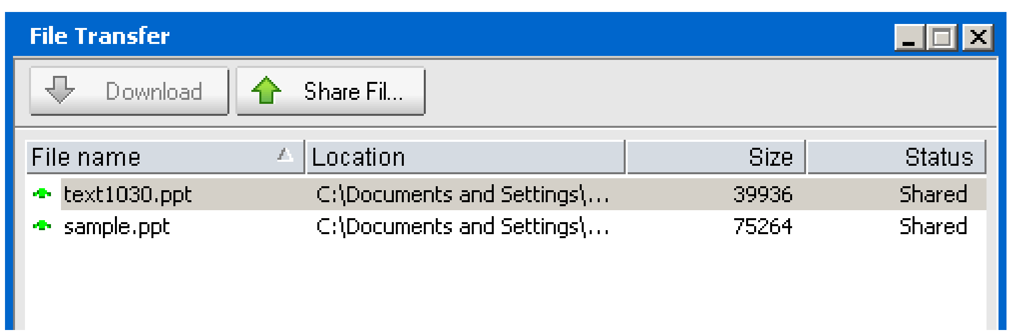
TRANSFERRING FILES DURING A MEETING

As a presenter, you can publish files that reside on your computer during a meeting. For example, you can provide attendees with a document, a copy of your presentation, an application, and so on. Published files appear in each attendee's Meeting window, allowing them to download the files to their computers.

To transfer files during a meeting:

1 On the *File* menu, choose *Transfer*.

The File Transfer window appears.



2 Click *Share File*.

3 Select the file that you want to publish, and then click *Open*.

4 Optional. Repeat steps 2 and 3 to publish additional files. The files appear in the File Transfer window in each participant's Meeting window

Asking attendees to share documents, desktops, video, applications, and files

You can ask attendees to share items residing on their computers.

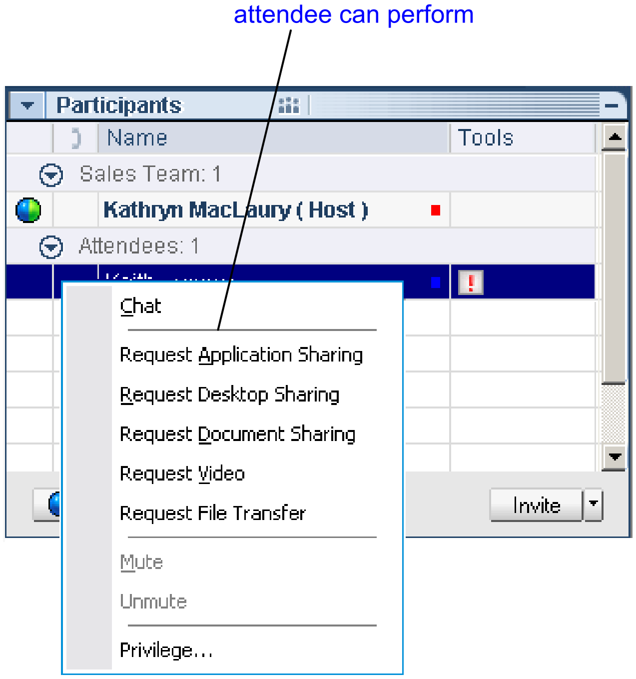
1. In the attendee list, select the attendee you want to let share an item with you and other meeting participants.
2. Click the right mouse button.

A shortcut menu appears. You can ask an attendee to share:

- an application
- the desktop
- a document or presentation
- video
- a file (using File Transfer)

3. Select the sharing task you want the attendee to perform.

List of sharing tasks an attendee can perform



The attendee agrees to share the type of item you have selected. Then the attendee selects the item and displays it.

TIP The meeting host, sales team members, experts, and attendees all see the presenter ball in the Participants panel, next to the name of the person who is currently sharing.

RECORDING A MEETING

For details about using WebEx Recorder to record on-screen activity in a meeting and capture audio in a voice conference, refer to the *WebEx Recorder and Player User's Guide*, which is available on Recording and Playback page on your SalesCenter Web site. You can access this page from your site's Support page.

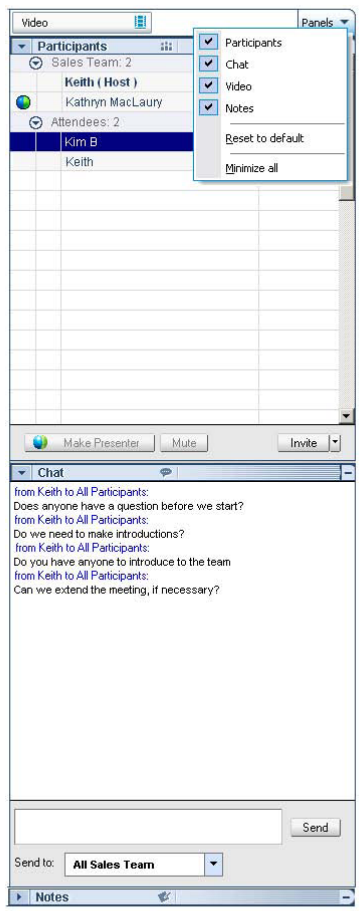
Interacting with Attendees

WORKING WITH THE PANELS

Using the panels on the right side of the Meeting window, you can chat with attendees, poll them, send video. These panels are very flexible. You can expand, close, or minimize them quickly and easily. You can also reduce the panels to icons, providing greater space for sharing documents, applications, and other items with meeting participants.

PANEL OVERVIEW

Your service selects which panels display initially.

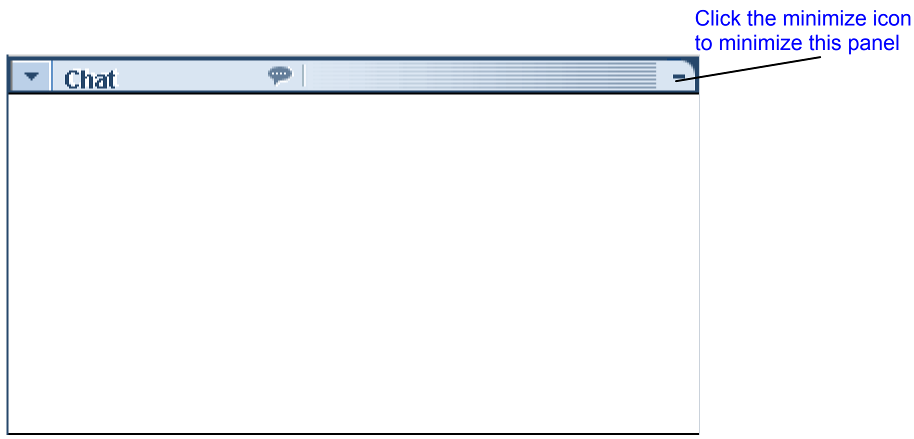


MINIMIZING AND RESTORING PANELS

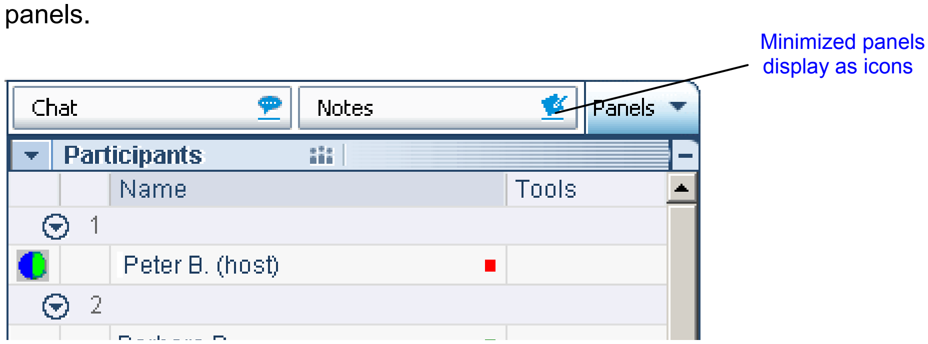
Minimizing and restoring panels has no effect on attendees' displays.

To minimize a panel:

Click the *Minimize* icon on the title bar of the panel you want to minimize.

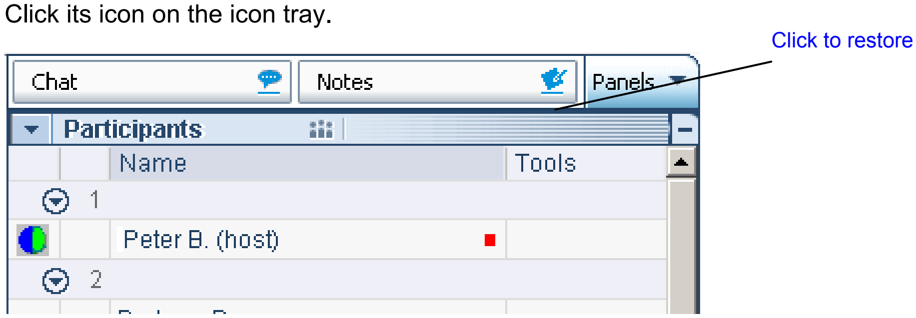


The panel no longer displays. It appears as an icon on the icon tray at the top of the panels.



To restore a minimized panel:

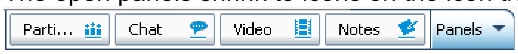
Click its icon on the icon tray.



To minimize all panels:

1. On the icon tray, click *Panels*. The *Select Panel* menu displays.
2. On the *Select Panel* menu, choose *Minimize All*.

The open panels shrink to icons on the icon tray.



To restore all minimized panels:

The *Restore All* command quickly restores all panels you have minimized using the *Minimize All* command.

1. In the icon tray, click *Panels.* The *Select Panel* menu displays.

2. On the *Select Panels* menu, choose *Restore All*. Minimized panels now display.

EXPANDING AND COLLAPSING PANELS

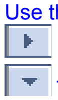
Expanding and collapsing panels has no effect on the attendees' displays.

To collapse a panel:

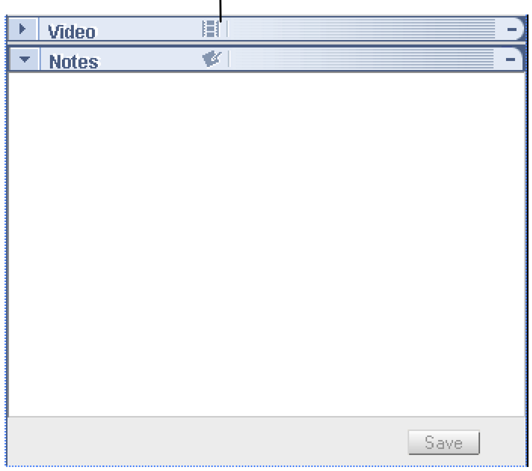
Click the icon in the upper left corner of a panel to collapse it.

The panel collapses, leaving just the title bar visible.

Use the icon on the left side of the panel title bar to collapse or expand a panel.



The video panel is collapsed



To expand a panel:

If a panel is collapsed (you only can see its title bar), click the icon in the left corner of the title bar to expand it.

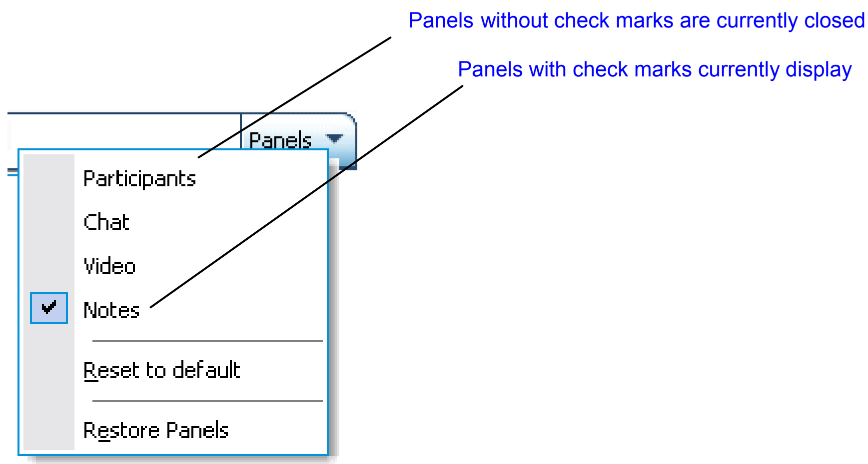
OPENING AND CLOSING PANELS

You can hide a panel completely so it will not display as an icon on the icon tray. If you close a panel, that panel also closes for attendees. It remains closed for all attendees until you open the panel again.

To close a panel:

1 On the icon tray above the panels, click *Panels.*

The *Select Panel* menu displays.



2 On the *Select Panel* menu, click to remove the check mark next to the panel you want to close.

The panel no longer displays and it is not available as an icon on the icon bar.

If you close the last remaining panel, the large panel area on the right side of the screen disappears. You still have access to the panels through the *Select Panel* menu, available by clicking the *Select Panel* button.

To open a panel:

1 On the icon tray above the panels, click *Panels.*
The *Select Panel* menu displays.

2 On the *Select Panel* menu, click to place a check mark next to any panel you want to open.
The panel or panels you selected display. This panel is now available for all attendees.

RESETTING THE PANELS

You can return the panels to the display settings that were preset by your service.

1 On the icon tray above the panels, click *Panels*. The *Select Panel* menu displays.

2 On the *Select Panel* menu, choose *Reset to Default*. The panels return to the display settings originally selected by your service. The size, order, and location of the panels are reset to their original settings.

ACCESSING PANEL OPTIONS

You can easily access the options related to any panel. Simply right-click in the panel title bar to see a menu of commands related to the panel.

Panel	**Options**
Participants	**Sound Alerts:** Lets you choose a sound to play when a participant: • Joins a meeting • Leaves a meeting • Selects the **Raise Hand** button on the **Participants** panel.
Chat	**Sound Alerts:** Lets you choose the kinds of chat messages for which you want a sound to play. Select a sound from the drop-down list or click Browse to find a sound in a different location on your computer.
Video	**Video Options:** Displays the Meeting Options dialog box, where you can set video options as well as other options you want to make available during the meeting.
Notes	**Notes:** Displays the Meeting Options dialog box, where you can set note-taking options as well as other options • **Allow all sales team members to take notes:** Lets all sales team members take their own notes during the meeting, and save them to their computers. • **Single note taker:** Lets only one sales team member take notes during the meeting. By default, the host is the note-taker, but can designate another sales team member as the note-taker during the meeting. A note-taker can publish notes in all sales team members' Meeting windows at any time during the meeting. The host can send a transcript of the notes to sales team members at any time.

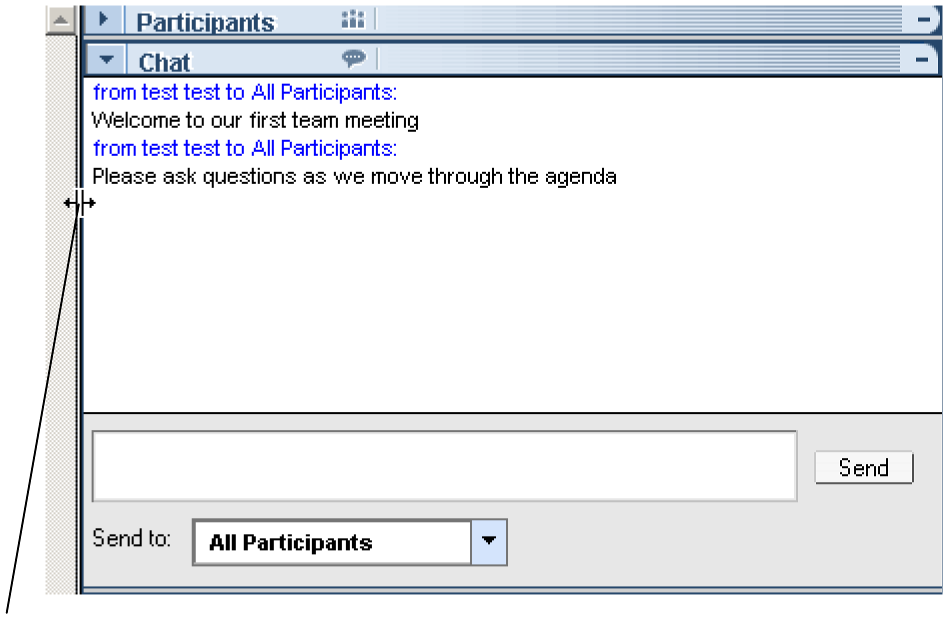
RESIZING THE CONTENT VIEWER AND PANELS AREA

You can control the size of the content viewer by making the panel area narrower or wider.

To change the size of the content viewer and panels:

Click the dividing line between the content viewer and the panels.

- Drag the line to the left to make the area devoted to the panels wider.
- Drag the line to the right to make the content viewer larger.



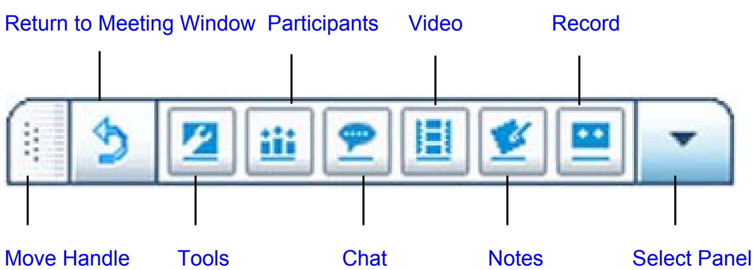
Drag this line to the right or left to change the size of the content viewer and panels area

For details about hiding, minimizing, and closing the panels, see *Panels and full-screen view*, next.

PANELS AND FULL-SCREEN VIEW

While you are viewing or remotely controlling a shared application, desktop, or Web browser, or viewing a shared remote computer, a presenter can switch between a standard window and full-screen view.

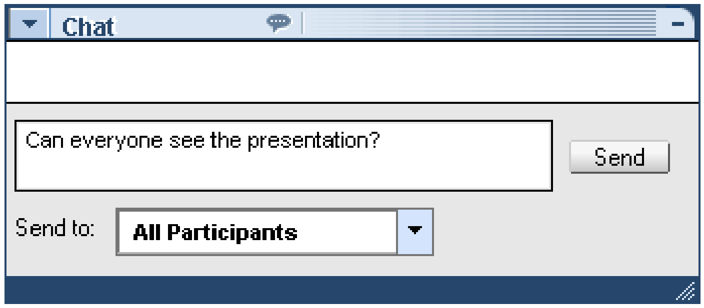
In full-screen view, you access the panels on a floating icon tray located in the lower right corner of your screen.



To display a panel in full-screen view:

Click its icon on the floating icon tray. For example, to display the *Chat* panel, click the *Chat* icon.

The panel “floats” on top of the shared document, presentation, web browser or other shared item. You can drag the panel to move it.



To open all panels in full-screen view:

You can have all panels float on top of the shared document, presentation, web browser, or other shared item.

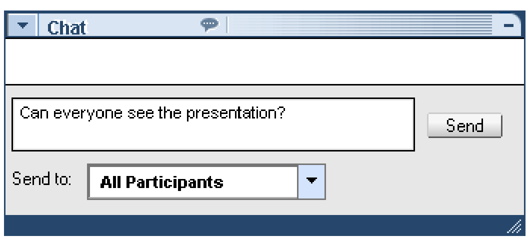
1 On the floating icon tray, click the *Select Panel* button.
It is the last button on the floating icon tray.

2 On the *Select Panel* menu, choose *Float All Panels.*

All panels display, even those you had minimized previously.

What you can do

Resize individual panels using the *Resize Control* in the bottom right corner of any floating panel.



To organize the floating panels:

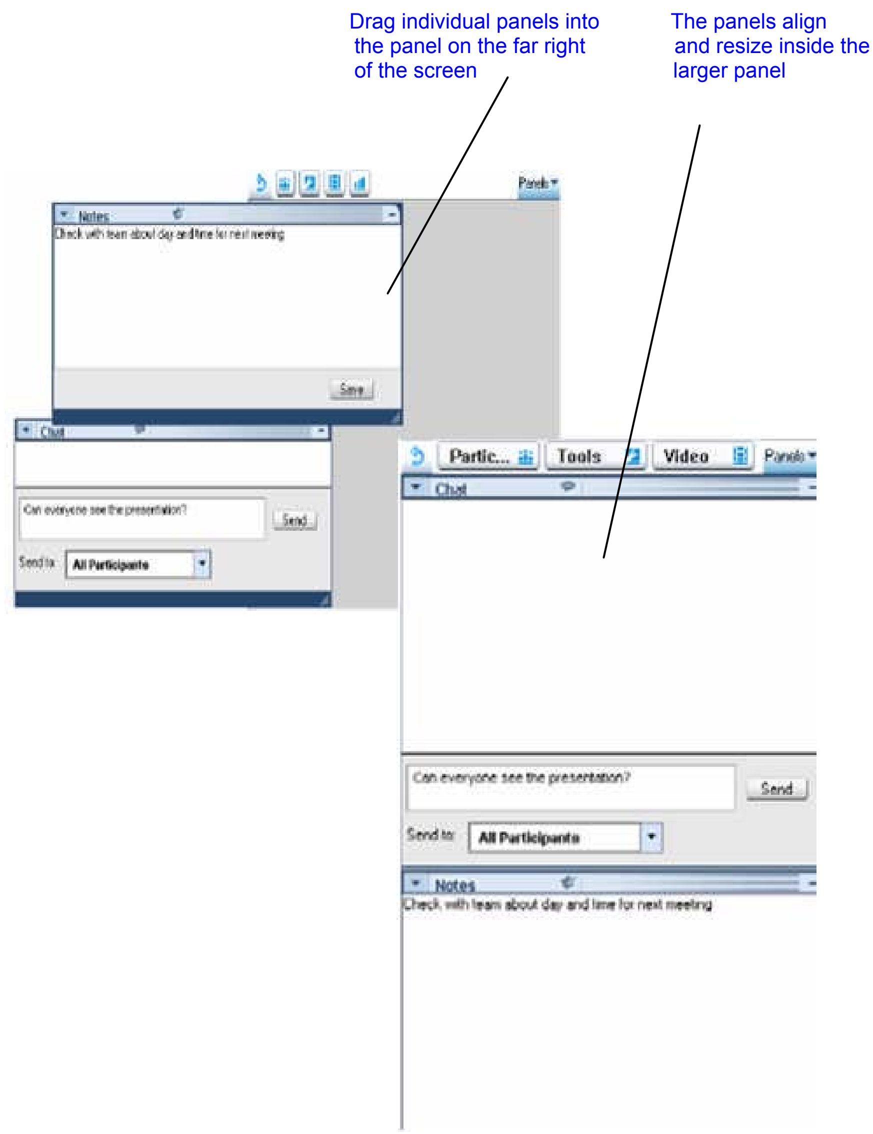
As you reopen the panels to jot a few notes or chat with a participant, you may find you need to arrange the panels.

1 On the floating icon tray, click the *Select Panel* button.
It is the last button on the floating icon tray.

2 On the *Select Panel* menu, choose *Open Right Panel*.

An empty panel appears on the right side of the screen.

The icon tray now resides at the top of the right panel.



SHARING AND FULL SCREEN VIEW

In full-screen view, you have access to sharing and viewing options from the *Select Panel* menu.

If you are sharing a document

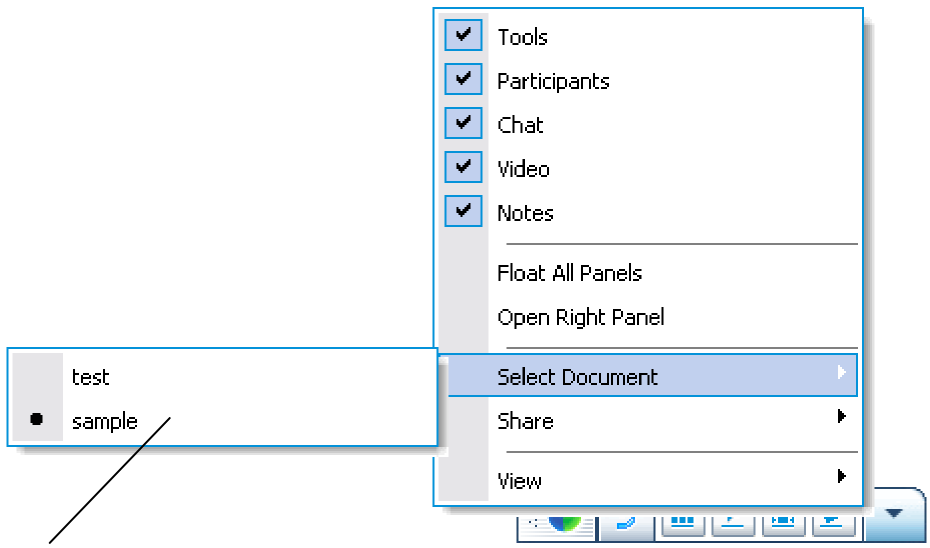
If you have already opened several documents, you can switch to share any of these documents.

To display a different document

3 On the floating icon tray, click the *Select Panel* button. It is the last button on the floating icon tray.

4 On the *Select Panel* menu, choose *Select Document*. You see a list of documents that are currently open in this meeting.

5 Select the document you want to share.

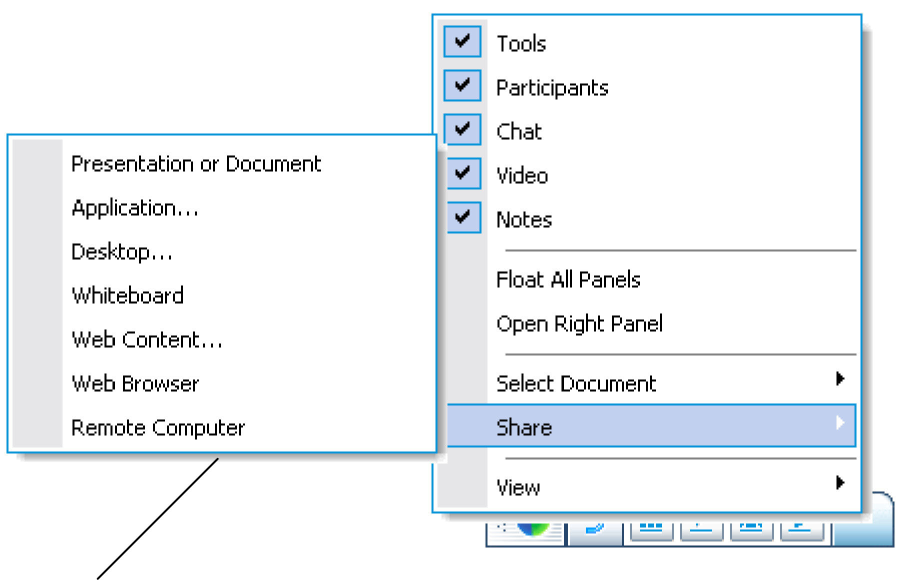


Select a different document to display

To select another sharing option:

1 In the floating icon tray, click the *Select Panel* button.
It is the last button on the floating icon tray.

2 On the *Select Panel* menu, choose *Share*.
You see the list of sharing commands.



Sharing Commands

3 Choose the kind of sharing you want to do.

For details about these options, see *Sharing documents and presentations.*

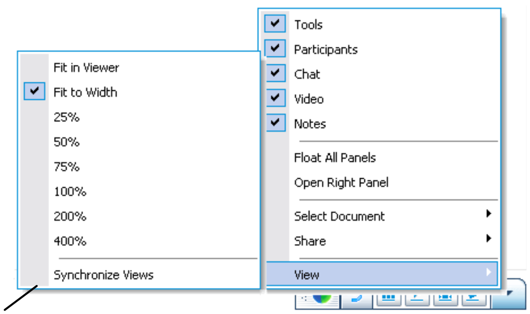
To resize the display of attendees to match your display:

1 On the icon tray above the panels, click the *Select Panel* button.

2 It is the last button on the floating icon tray.

3 On the *Select Panel* menu, choose *View* > *Synchronize Views*.

4 All attendees' displays now match your display.



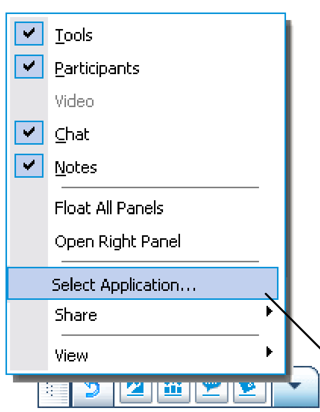
Synchronize Views command

IF YOU ARE SHARING AN APPLICATION

To display a different document:

1 On the floating icon tray, click the *Select Panel* button.
It is the last button on the floating icon tray.

2 On the *Select Panel* menu, choose *Select Application*.



Select Application command

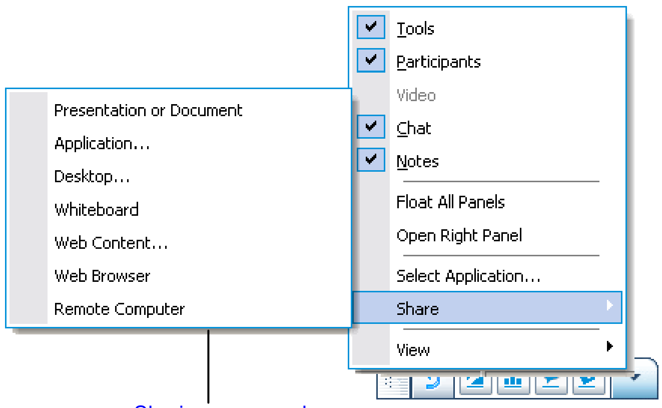
The Share Application dialog displays.

3 Select the application you want to share. Or click *New Application* to open an application not already running on your desktop.

To select another sharing option:

1 On the floating icon tray, click the *Select Panel* button.
It is the last button on the floating icon tray.

2 On the *Select Panel* menu, choose *Share*.
You see the list of sharing commands.



Sharing commands

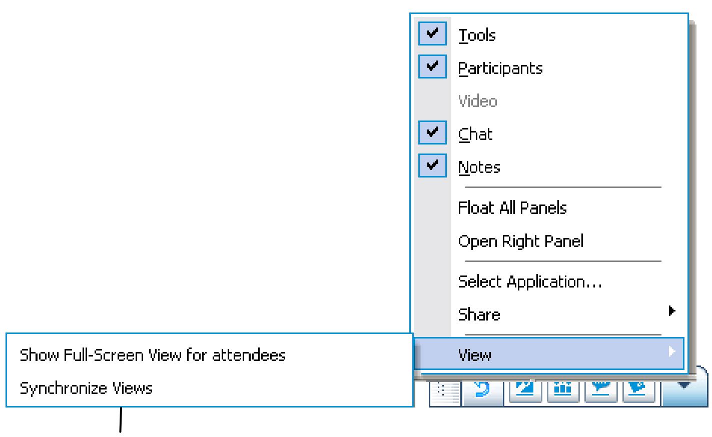
3 Choose the kind of sharing you want to do.

For details about these options, see *Sharing documents and presentations.*

To resize the display of attendees to match your display:

1 On the floating icon tray, click the *Select Panel* button.
It is the last button on the floating icon tray.

2 On the *Select Panel* menu, choose *View* > *Synchronize Views*.
All attendees' displays now match your display.



Choose Synchronize Views.

If you are sharing a desktop

To select another sharing option:

1 On the floating icon tray, click the *Select Panel* button.
It is the last button on the floating icon tray.

2 On the *Select Panel* menu, choose *Share*.
You see the list of sharing commands.

3 Choose the kind of sharing you want to do.

To resize the display of attendees to match your display:

4 On the floating icon tray, click the *Select Panel* button.
It is the last button on the floating icon tray.

5 On the *Select Panel* menu, choose *View* > *Synchronize Views*.
All attendees' displays now match your display.

PANEL ALERTS

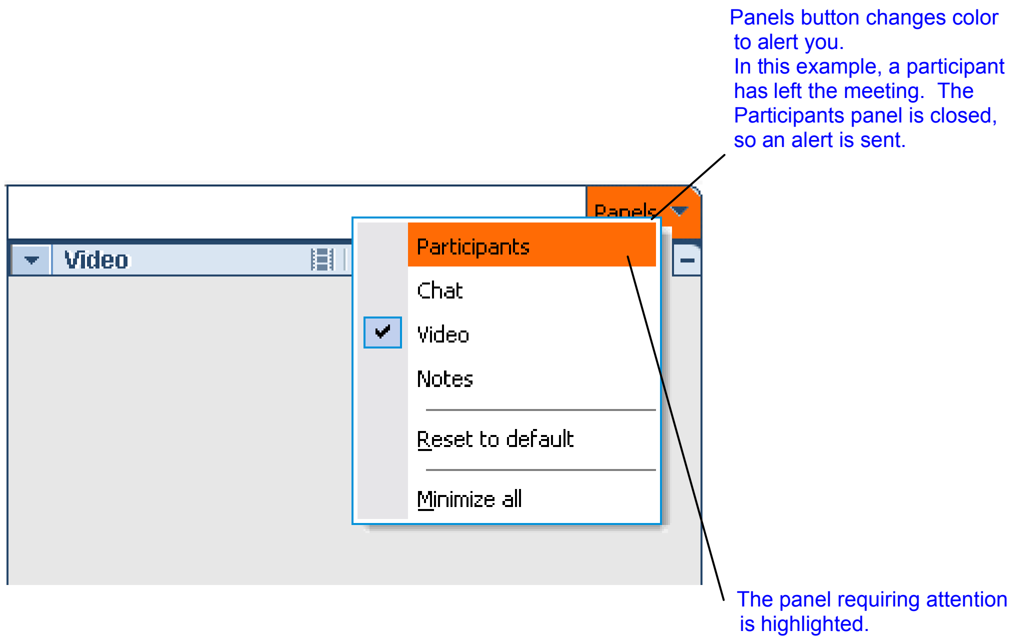
If you have closed, minimized, or collapsed any panels, you will see an alert if a panel you no longer can see requires your attention.

Some reasons for seeing alerts:

- A participant arrives or leaves a meeting
- A *Raise Hand* indicator appears in the Participants list
- The note taker publishes notes
- An attendee sends a chat message

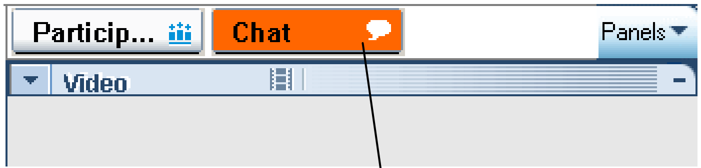
Alerts for closed panels

If you have closed a panel, the *Panels* button changes color to alert you to a change. For example, if a participant leaves your meeting, and you have closed the Participants panel, the Select Panel menu button turns into an alert.



Alerts for minimized panels

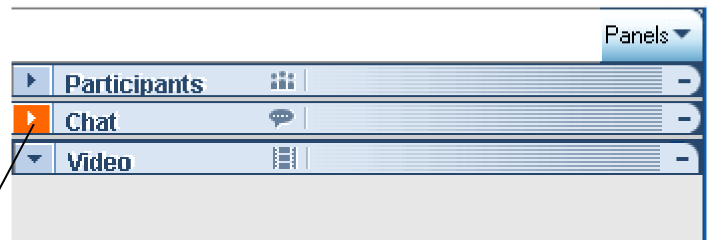
If you have minimized a panel, the icon representing that panel alerts you of a change.



The Chat icon changes color to let you know you have a new chat message.

Alerts for collapsed panels

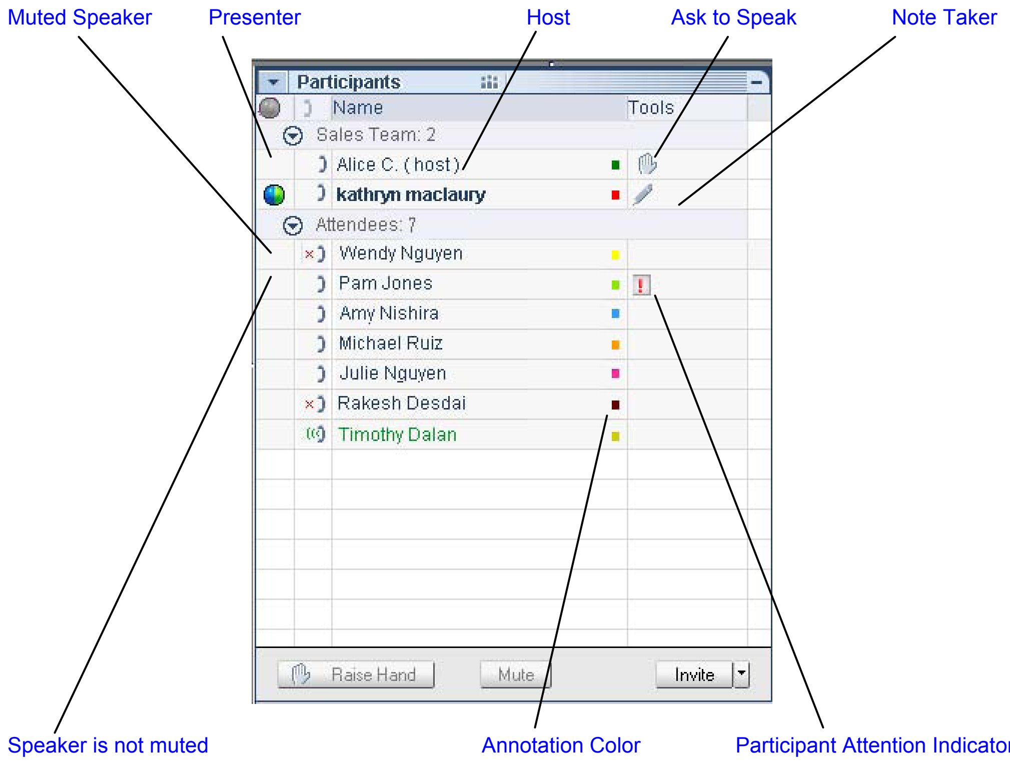
If you have collapsed a panel, the *Expand/Collapse* icon changes color when you need to pay attention to that panel.



The icon changes color to let you know you should check the contents of this panel.

UNDERSTANDING THE PARTICIPANTS PANEL

In addition to the list of people currently attending your meeting, the Participants panel provides other information about the attendees.



The following table describes the possible indicators that may appear in the participant list.

Indicator	Indicator name	Description
(host)	**Host** indicator	Indicates the meeting host.
(Expert)	**Expert** indicator	Indicates a subject matter expert.
	**Group** indicator	Indicates more than one attendee is viewing the meeting and these attendees have joined as a group.
	**Presenter** indicator	Indicates the current presenter.
	**Annotation Color** indicator	Indicates the color with which the participant can annotate shared content. Participants can select another color with which to make annotations, but their assigned colors in the participant list remain the same.
	**Speaker** indicator for teleconference	In an integrated teleconference, indicates that the participant is

		connected to the teleconference and his or her microphone is not muted—that is, the participant can speak.
	Muted Speaker indicator for teleconference	In an integrated teleconference, indicates that the participant is connected to the teleconference but his or her microphone is muted.
	Participant Attention indicator	Indicates that a participant is no longer focused on the meeting. The **Participation Attention** indicator shows whether any meeting participant has either: ■ minimized the meeting client window, or ■ brought another window into focus on top of the meeting client window
	Ask to Speak indicator	In the host's and presenter's participant list only, indicates that the participant has clicked the **Raise Hand** button.
	Note Taker indicator	Indicates the single note taker for the meeting, if the host designated a note taker

SENDING A CHAT MESSAGE TO PARTICIPANTS

Sales team members and attendees can send and receive chat messages. Chat is useful if you want to:

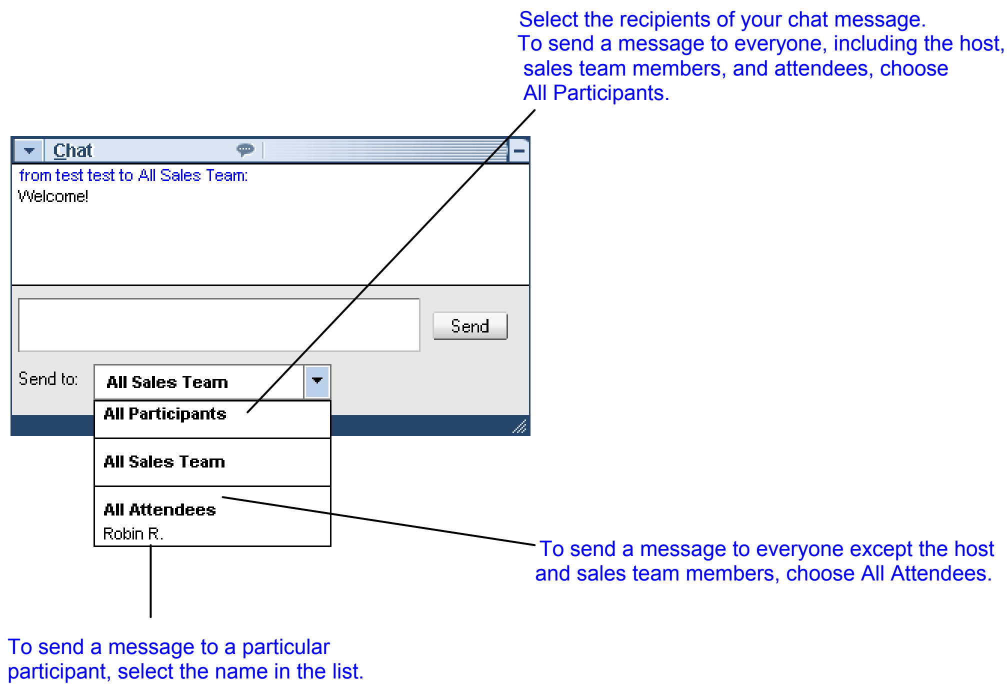
+ send brief information to all participants
+ ask a question or request help but do not want to interrupt the presenter

Sales team members have access to more chat features. They can

+ send a private message to another sales team member or an attendee
+ print chat messages that appear in the chat viewer, and save them to a *.txt* file

To send a chat message:

1. In the Meeting window, open the *Chat* panel.
2. Type a message in the *Chat* box.
3. In the *Send to* drop-down list, select the recipients of the message.



4 Click *Send.*

The recipients receive the chat message in their chat viewer.

ABOUT TAKING NOTES

During a meeting, one or more meeting participants with access to the notes feature can take notes on the **Notes** panel in the Meeting window. If all participants with access take notes, they cannot publish their notes to others during the meeting. However, participants can save their notes at any time during the meeting.

If only a single participant can take notes, the meeting host can select the single note taker during the meeting. A single note taker can publish notes at any time during the meeting or send a meeting transcript containing the notes to all participants.

TAKING PERSONAL NOTES

If the meeting host or presenter has selected the option to allow participants to take personal notes, you can type your notes on the *Notes* panel in the Meeting window.

To take personal notes:

1 In the Meeting window,open the Notes panel.
2 Type your notes in the box.

TAKING PUBLIC NOTES (MEETING MINUTES)

If the meeting host has designated you as the single note taker for a meeting, you can type notes on the *Notes* panel in your Meeting window. Your notes are not visible to other meeting participants until you publish them. You can publish your notes at any time during the meeting, or you can send your notes in a meeting transcript to all participants.

To take public notes:

1. In the Meeting window, open the Notes panel.

2. Type your notes in the box.

3. Optional. To publish your notes, so they appear in each participant's *Notes* panel, click *Publish.*

SAVING NOTES TO A FILE

If you are taking personal or public notes during a meeting you can save your notes to a text file on your computer. You can also save any notes that another note taker publishes on your **Notes** panel. Once you save new notes to a file, you can save changes to the notes or save a copy of the notes to another file.

To save new notes:

1. In the Meeting window, perform *either* task:
   - On the **Notes** panel, click **Save**.
   - On the **File** menu, point to **Save**, and then choose **Notes**. The Save Notes As dialog box appears.

2. Choose a location at which to save the file.

3. Type a name for the file.

4. Click **Save**. Meeting Manager saves the file at the location you chose. Its file name has a *.txt* extension.

To save changes to notes:

In the Meeting window, do *either* of the following:

+ On the *Notes* panel, click *Save.*

+ On the *File* menu, point to *Save*, and then choose *Notes.*

Meeting Manager saves the file at the location you chose. Its file name has a *.txt* extension.

To save a copy of notes to another file:

1. In the Meeting window, on the *File* menu, point to *Save As*, and then choose *Notes.*
The Save Notes As dialog box appears.

2. Do *either* or *both* of the following:

   - Type a new name for the file.
   - Choose a new location at which to save the file.

3. Click *Save*.

Meeting Manager saves the file at the location you chose. Its file name has a *.txt* extension.

TIP Alternatively, you can save all of the following meeting information to files at once:

- shared presentations or documents
- chat messages
- notes

To save all information at once, on the *File* menu, choose *Save All*. In this case, Meeting Manager uses the default file names for the files. Thus, if you have already saved a file using another name, Meeting Manager does not overwrite that file.

ABOUT MANAGING A VOICE CONFERENCE

You have several options for providing audio in your meeting. You can set up a phone teleconference, using the integrated teleconferencing service. With this option, you can either have attendees call a phone number to join the teleconference or have attendees receive a callback. If you prefer, you can use another teleconferencing service provider or and internal teleconferencing service.

Once you set up a voice conference, you can use conference features to manage your integrated teleconference

During an integrated teleconference, you can:

- Add an attendee to a call-back teleconference at any time. You can also add someone who is not a meeting attendee to the teleconference.

- Control which participants can speak by muting and unmuting their microphones.

ADDING AN ATTENDEE TO A CALL-BACK TELECONFERENCE

Once an attendee joins a meeting that includes an integrated teleconference, a dialog box appears in the attendee's Meeting window, providing instructions for joining the teleconference. However, if you set up a call-back teleconference, you can add an attendee to the teleconference at any time. You can also add someone who is not a meeting attendee to the teleconference.

To add an attendee to a call-back teleconference:

1. On the *Participant* menu, choose *Invite> by Phone*.

   The Phone dialog box appears.

The *Status* box indicates that call status is Ready.

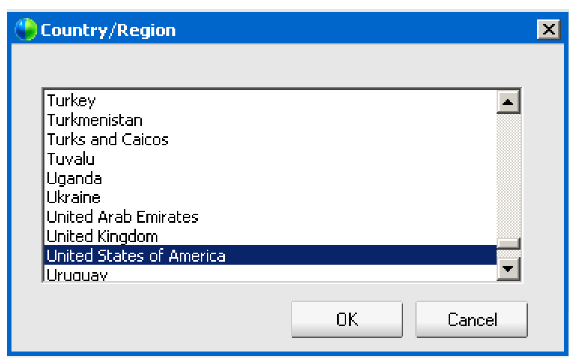
2 Type the name of the person whom you want to call in the *Name* box.

3 Type the attendee's area or city code, phone number, and extension in the *Area/City code, Number,* and *Extension* boxes, respectively.

4 Ensure that the country code is that for the country in which the attendee resides.

To select a different country code, do the following:

- Click *Country Code.* The Country Code dialog box appears.



- In the list, select the country in which the attendee resides.
- Click **OK**.

5 Click **Call**.

The teleconferencing service calls the attendee. The **Status** box indicates the status of the call.

Once the call connects, the **Clear** button becomes available.

6 To call another attendee, click **Clear** to reset the status to the **Ready** state.

7 Once you have finished calling attendees, click **Close**.

SETTING UP VIDEO

If a video camera is attached to your computer, you can send live video to meeting participants. Live video lets other participants see you, an object under discussion, and so on. All participants can view live video that you send, without the need for video equipment installed on their computers.

To set up video, you must connect a video camera—also called a webcam—to your computer. Once you start or join a meeting, Meeting Manager automatically detects your video camera.

Generally, Meeting Manager is compatible with any video camera that connects to your computer's USB or parallel port. The quality of the video image can vary, depending on the quality of the video camera that you use. For a list of video cameras that are known to be compatible with your Meeting Manager software, refer to the Frequently Asked Questions (FAQ) page on your meeting service Web site. You can access this page from your site's Support page.

SENDING LIVE VIDEO

Only the presenter or an attendee selected by the presenter can send live video.

To send live video:

In the Meeting window, display the Video panel on the right side of the Meeting window. For details about using the panels, see *Working with the panels*.

Meeting Manager begins sending live video immediately.

To send live video, you must connect a video camera to your computer. For details, see consult the documentation that accompanied your camera.

SENDING A MEETING TRANSCRIPT TO PARTICIPANTS

As a meeting host, single note taker, or closed captionist, you can send a transcript of a meeting in an email message to all participants at any time before the meeting ends. The transcript, which Meeting Manager creates automatically, contains the following information:

- meeting topic
- meeting number
- meeting starting and ending times
- the list of all participants
- the meeting agenda
- any public notes or closed captions that you took during the meeting, if you saved them to a file

You can optionally attach any of the following files to the transcript message, if you saved them during the meeting:

+ shared documents

+ poll questionnaire

+ poll results

+ chat messages

+ public notes or closed captions

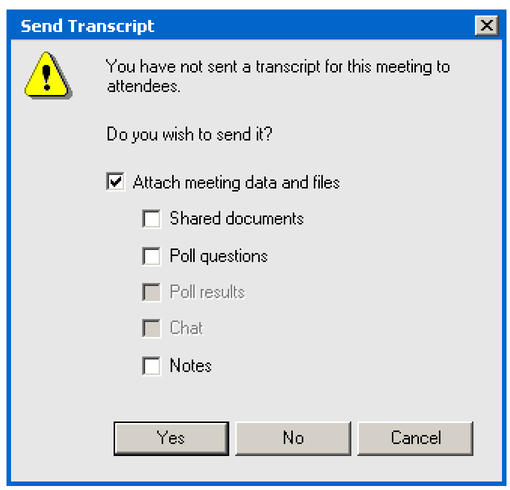
For security purposes, each transcript email message that a participant receives does not display the email addresses for other participants.

Important
To receive a transcript email message, a participant must provide his or her email address when joining the meeting.

To send a meeting transcript to participants:

1. On the *File* menu, choose *Send Transcript*.

2. (Optional) To include any files or other data shared or presented in the meeting, select the “Attach meeting and data files” check box.



3. (Optional) Select the check box for any files that you want to attach to the transcript email message, and then click *OK*.

4. In the new email message that appears, review the content and make any necessary changes.

5. Send the transcript email message.

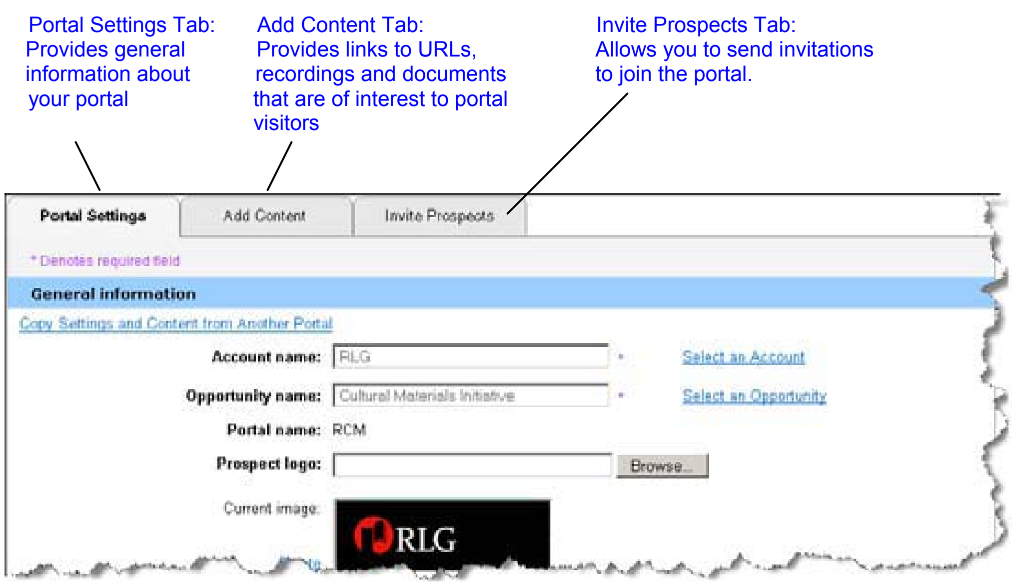
SETTING UP A SALES PORTAL

About sales portals

You can set up a meeting place, called a “sales portal,” for a particular group of attendees. By enabling attendees to meet and exchange information, you can be more productive and effective. You will probably find you need to host fewer meetings to close the deal. Materials can be posted on the sales portal, which reduces the time required to exchange documents. Also, product champions within the target company can use the sales portal to raise awareness about your products and sell the products for you.

To create a sales portal:

1. Log in to your SalesCenter Web site.
2. On the SalesCenter navigation bar, click *Sales Portals* and then click *Create Portal.* The Create Portal page opens with the *Portal Settings* displayed.



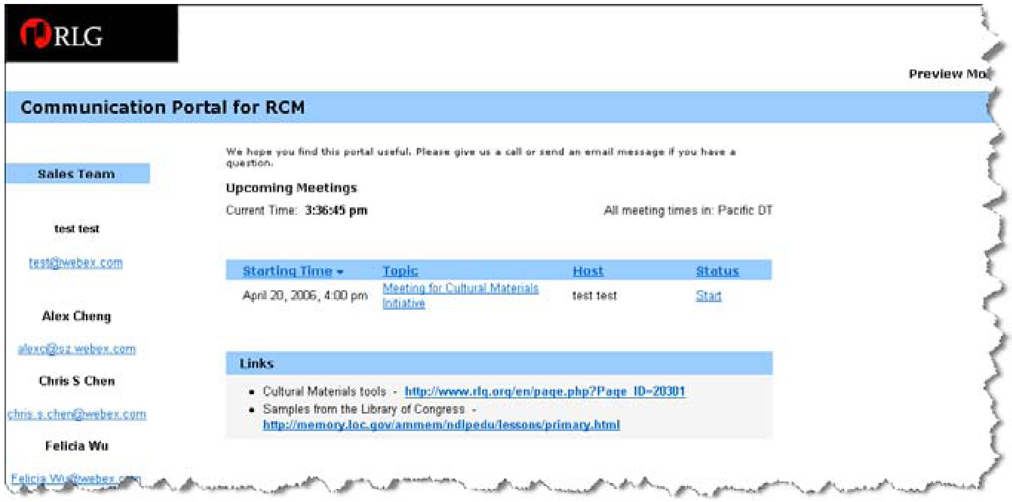
3. On the *Portal Settings* tab, enter general details about the sales portal.

You are required to:

- Select the Account and Opportunity for whom you want to build this sales portal
- Type a name for the sales portal

You can also:

- Provide the prospect’s logo, which will appear on the sales portal page.
- Type a welcome message of up to 128 characters.
- Allow a prospect to invite others and to approve automatically those users who register.
- Add the names of sales teams members you would like to include on the sales portal page. You can also include their email addresses, office or cell phone numbers, and photos of sales team members



4 Optional. On the *Add Content* tab, you can add valuable information for your visitor, such as:

- Recordings of relevant meetings
- URLs of helpful sites
- Documents that would be useful to sales portal visitors

5 Optional. On the *Invite Prospect* tab, prepare and send invitations to prospects.

Decide whether you want to require prospects to register before using your sales portal. If you are particularly interested in learning about who is using the sales portal or if you allow prospects to invite others to your sales portal, consider requiring registration.

To invite prospects and require them to register:

In the upper text box, type email addresses of those you want to invite.Or you can click *Select Prospects* to select email addresses from your address book.

Separate each address with a comma or semicolon.

To invite prospects and *not* require them to register:

In the lower text box, type email addresses of those you want to invite.Or you can click *Select Prospects* to select email addresses from your address book.

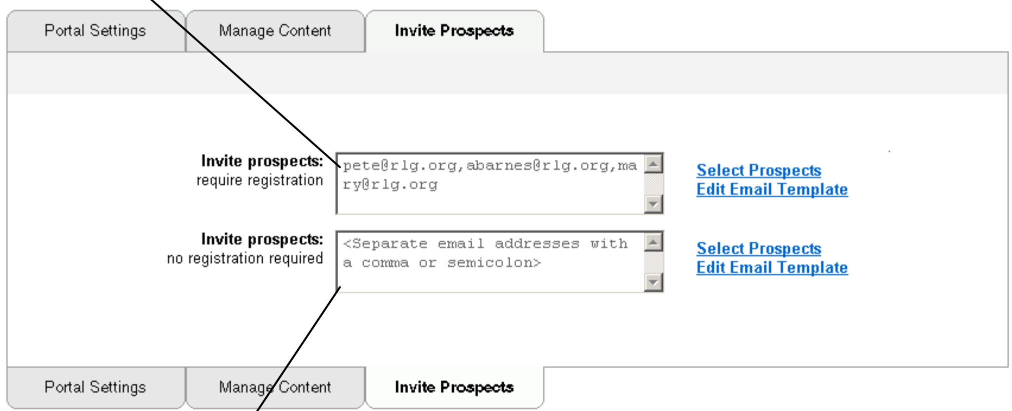
Separate each address with a comma or semicolon.

To invite prospects and *not* require them to register:

In the lower text box, type email addresses of those you want to invite.Or you can click *Select Prospects* to select email addresses from your address book.

Separate each address with a comma or semicolon.

In the upper box, enter the email addresses of those you want to register before they can access your portal.



In the lower box, enter the email addresses of those not required to register.

6 Optional. Click *Edit Email Templates* to add a personal message or more details to the sales portal invitation email message.

Do not change the sales portal URL.

Click *Create Portal*. The Manage Portal page displays, where you can view the details or edit the sales portal you just created. Any users whose email addresses you entered in the *Invite Prospects require registration* text box receive invitations to register at this sales portal.

Managing and Monitoring Meetings

PARTICIPANT ROLES AND PRIVILEGES

Each participant in an online meeting has one of the following roles: *host*, *presenter*, or *attendee*. These roles determine which options you can use on your SalesCenter Web site and in Meeting Manager.

Role	Responsibilities and options
Host	A meeting host must have a user account on your SalesCenter Web site. A host can schedule, start, and control a meeting; and assign meeting roles to other participants. Initially, the host is also the presenter; however, the host can make any participant the presenter during the meeting.
Presenter	Only one participant at a time can be the presenter, but participants can take turns being the presenter during a meeting. A presenter can: ■ Share and annotate presentations, documents, and whiteboards

	■ Share software, and grant remote control of shared software to participants ■ Assign meeting privileges to other participants ■ Turn various meeting options on or off ■ Transfer files to participants ■ Send live video, and select which participants can send video
Sales Team Member	Sales team members can have multiple roles, but each sales team member plays one dominant role during the meeting. For example: ■ if a manager (who is not the meeting host) joins the meeting, he or she assumes the manager role. ■ if the meeting host invites a member of the sales team as a subject matter expert, then his or her role is that of subject matter expert. Most sales team members participate in a meeting but generally do not present information. Sales team members can view shared information and interact with it. A sales team member can also perform other tasks, such as being the designated note-taker.
Attendee	Attendees can never be assigned the role of presenter, but they can be asked to share their desktop, share a document, or transfer a file. Attendees cannot take notes, but they can send and reply to chat messages. For details on how to request an attendee to share or transfer information, see “Asking attendees to share documents, desktops, video, applications, and files

GRANTING ATTENDEE PRIVILEGES DURING A MEETING

During a meeting, you can grant privileges to or remove them from all attendees.

To specify attendee privileges during a meeting:

1. In the Meeting window, on the *Participant* menu, choose *Attendee Privileges*.

   The Attendee Privileges dialog box appears.

2. Specify privileges for attendees:

- To grant a privilege to attendees, select its check box.
- To remove a privilege from attendees, clear its check box.

3 Click *OK.*

CONTROLLING A TELECONFERENCE

Controlling an integrated teleconference

During a meeting, you can mute or unmute participants' microphones.

To mute or unmute specific participants' microphones:

1. In the participant list, select the participant.
2. On the *Participant* menu, choose *Mute* or *Unmute*.

To mute or unmute all participants' microphones:

On the *Participant* menu, choose *Mute All* or *Unmute All*

CONTROLLING A MEETING

As a meeting host, you can control many aspects of an online meeting.

Inviting attendees to a meeting in progress

Once you start a meeting, you can invite additional attendees to the meeting. Each person that you invite receives an invitation email message that includes information about the meeting—including the password—and a link that the attendee can click to join the meeting.

To invite an attendee to a meeting in progress:

1. On the *Participant* menu, point to *Invite,* and then choose *By Email*.
2. Type the attendee's email address.
3. Click *Send Invitation*.

Checking the availability of a subject matter expert

Even in a well-planned meeting, questions arise that only a subject matter expert can answer. If the expert is not participating in the meeting, you can contact that person without disrupting the meeting flow.

Your site administrator maintains a list of experts, along with a description of his or area of expertise (for example, a particular product line). This list is available to the meeting host and presenter throughout the meeting.

FINDING A SUBJECT MATTER EXPERT QUICKLY

1. On the Participant menu, choose *Invite >SME*. The list of subject matter experts displays.
2. Use a searching option to find a subject matter expert:

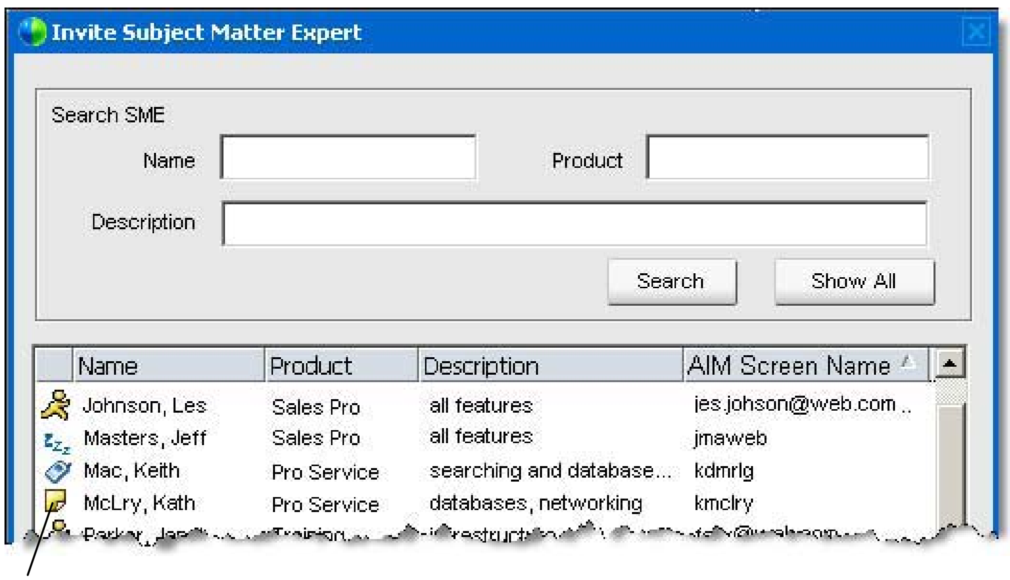
- On your keyboard, type the first letter of the last name of the person you want to invite. Alternatively, you can enter the last name in the *Name* box.
- In the *Product* box, enter the product name (or part of the name) you need expert advice about.
- In the *Description* box, Enter a description of the object, service, or other item you need advice about. If you enter a description, the results are sorted alphabetically by product name.

3 Click *Search.*

4 From the results, select the expert and click *Invite*.

Understanding the status of a subject matter expert

You have no need to track down an expert. As you look at the list of subject matter experts, note the icon to the left of each name. Pass your mouse over the icon to see the status of the person you want to contact. For instance, you will learn if the expert is available, busy, not in the office, on vacation, in a WebEx meeting.



Pass your mouse over this icon.
You can check the status of a subject matter expert.

Any of these icons may display next to the name of a subject matter expert, depending on his or her current status.

Icon	Availability
	**Available**: SME is logged on and at his or her computer.
	**Away**: SME is away.
	Idle: SME has not touched his or her computer for a specified amount of time
	**Mobile**: SME is "mobile" and can be reached by text message

DESIGNATING A PRESENTER

As a meeting host, you are initially the presenter as well. However, you can designate any attendee as the presenter. You can also reclaim the presenter role or change the presenter at any time.

To designate a presenter:

1. In the participant list on the *Participants* tab, select the name of the attendee whom you want to designate as the presenter.
2. Below the participant list, click *Presenter*.

TRANSFERRING THE HOST ROLE

As a meeting host, you can transfer the host role—and thus all control of the meeting—to an attendee.

To transfer the host role:

1. In the participant list on the *Participants* tab, select the name of the attendee to whom you want to transfer the host role.
2. On the *Participant* menu, point to *Make*, and then choose *Host.*

EXPELLING A PARTICIPANT

You can remove, or expel, a participant from a meeting at any time.

To expel a participant:

1. In the participant list on the *Participants* tab, select the name of the participant whom you want to expel.
2. On the *Participant* menu, choose *Expel*.

LOCKING AND UNLOCKING A MEETING

Once you start a meeting, you can restrict access to it, or “lock” it. This option prevents anyone else from joining the meeting. You can unlock a meeting at any time.

To lock a meeting:

On the *Meeting* menu, choose *Restrict Access*.

To unlock a meeting:

On the *Meeting* menu, choose *Restore Access*.

MONITORING MEETINGS

For meeting hosts

If you are the host of a meeting, you can view the meeting as your prospects are viewing it. You can also check whether any participants are currently focused away from your meeting and viewing other items on their computers. At the end of the meeting, you can create a report that provides the level of detail you need, down to the names of prospects and how long they attended your meeting.

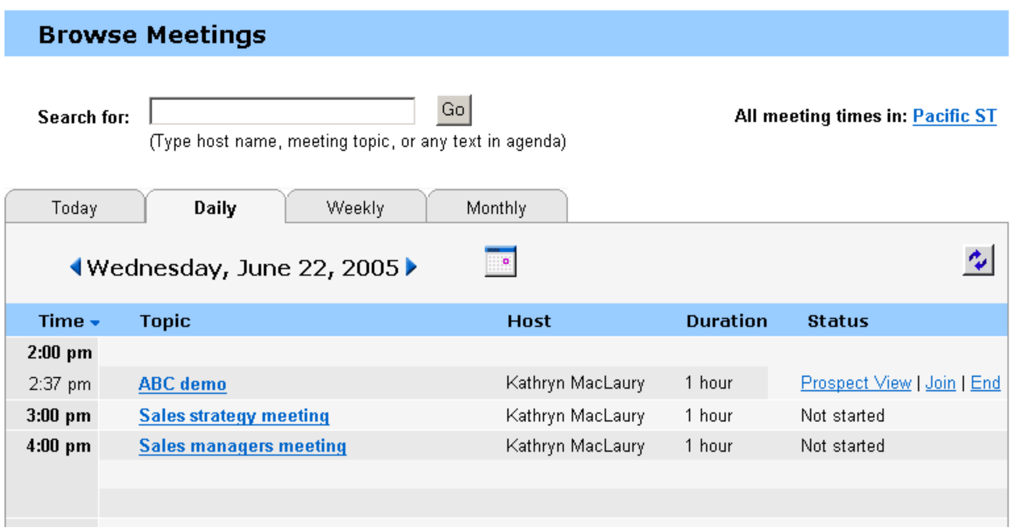
JOIN THE MEETING AS A PROSPECT

As the meeting host, you have the ability to view your meeting from the prospect's point of view. You can view your presentation and then fine-tune it, based on how it is seen from the prospect's perspective. Your presence as a "silent" prospect will not be detected by others, so you will not affect the actions of participants.

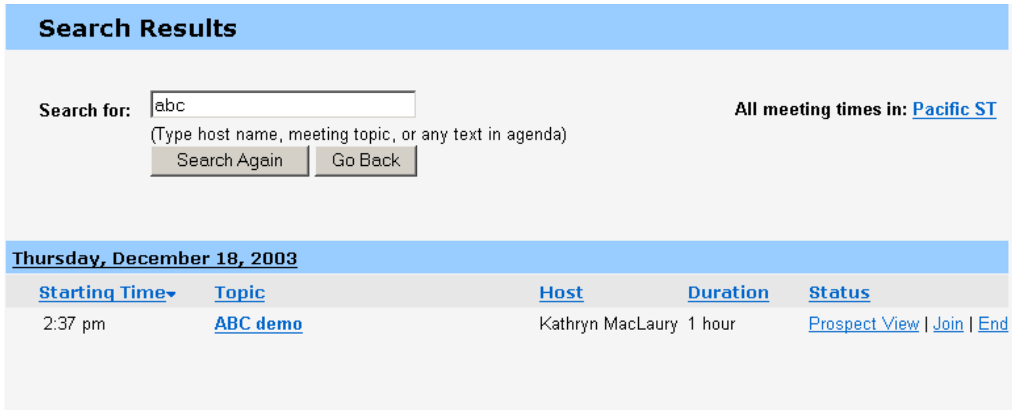
After the meeting has started, you can join the meeting by clicking the *Prospect View* link on the Browse Meetings page and the Search Results page.

+ Browse Meetings page

  The *Prospect View* link is in the status column, next to the *Join* link. The *Prospect View* link is available for all SalesCenter meetings you are hosting.



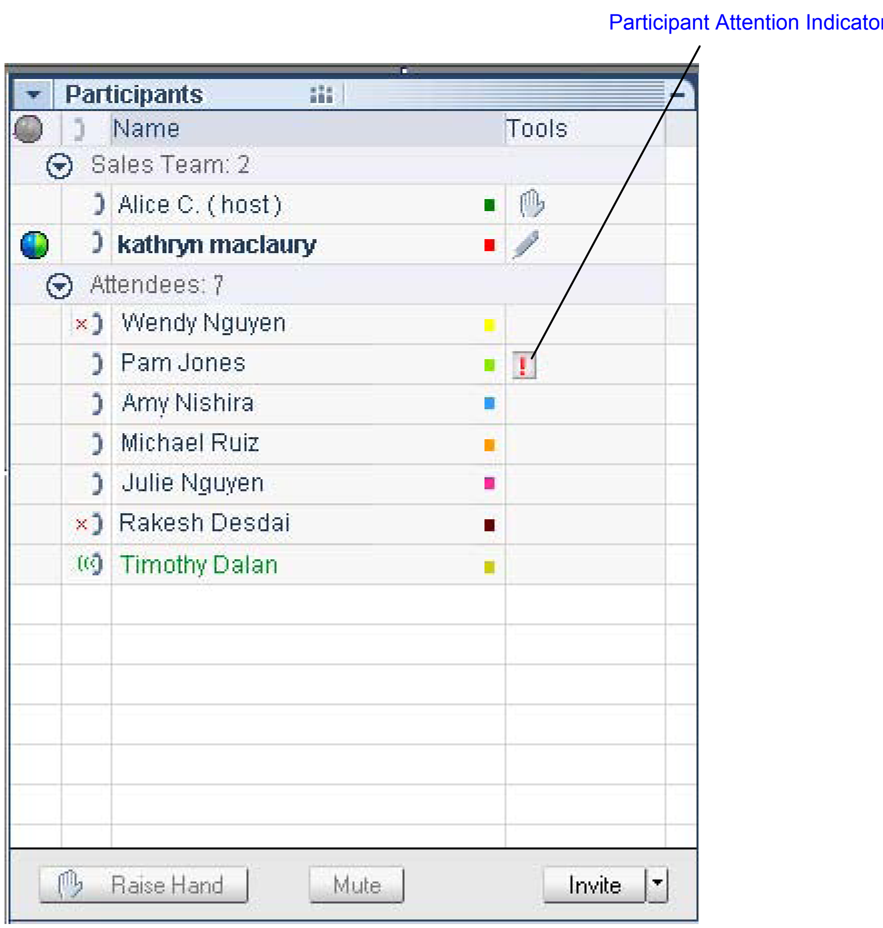
+ Search Results page The *Prospect View* link is in the status column, next to the *Join* link. The *Prospect View* link is available for all SalesCenter meetings you are hosting.



CHECK FOR THE PARTICIPANT ATTENTION INDICATOR

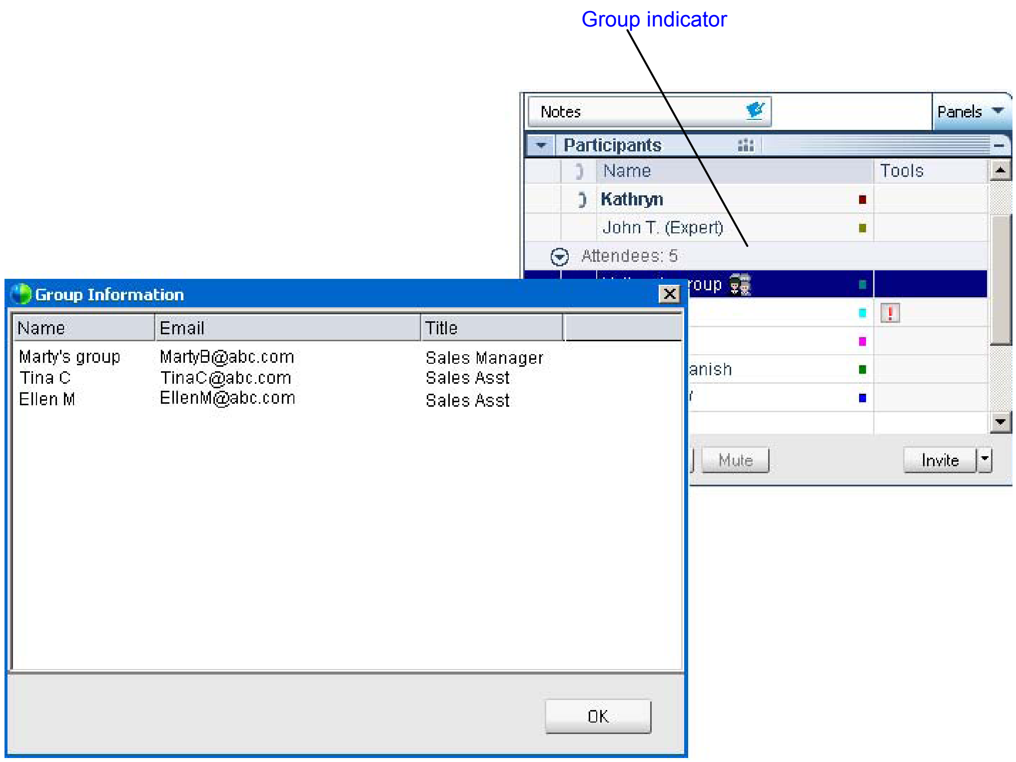
During your meeting, you can easily tell if a participant is no longer focused on your presentation. The *Participant Attention* indicator shows whether any meeting participant has either:

- minimized the meeting client window, or
- brought another window into focus on top of the meeting client



CHECK THE IDENTITY OF ATTENDESS WHO JOINED AS A GROUP

Several attendees may be attending your meeting together, using the same computer. When they join a meeting, each attendee can enter his or her name and email address. You see a *Group* indicator on the *Participants* panel for each attendee group. Click the indicator to see the names and email addresses of those in the group.



CREATE A SALES MEETING REPORT AFTER THE MEETING

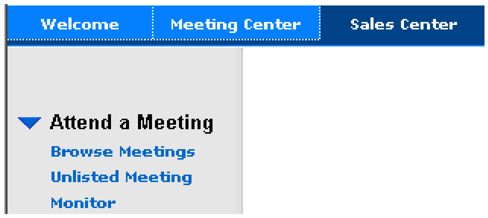
You can create a report that shows all your sales meetings or meetings for selected accounts. The report includes the number of attendees who joined the meeting without signing in individually. From the Sales Meeting Report, you can probe more deeply and see a list of participants, email addresses, and the arrival and departure time for each participant (sales team members and attendees).

FOR MANAGERS

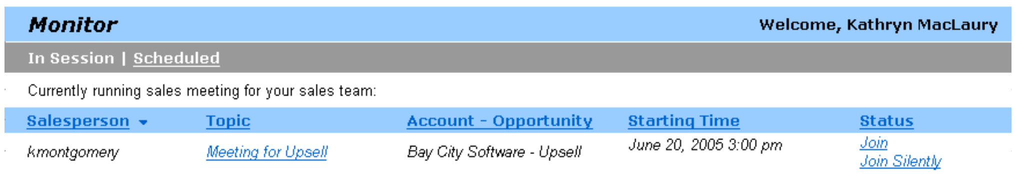
Managers can coach members of their sales force using tools available in SalesCenter. For example, managers can monitor sales meetings in the background, which can give a manager insight into how members of his sales team structure and run meetings. Sales Manager reports provide statistics about meeting attendance, frequency, and duration.

MONITOR A MEETING SILENTLY

To access the Monitor page, expand *Attend a Meeting* on the navigation bar, and then click *Monitor.*



Next, you see a list of meetings set up by sales teams under your direction and listed by sales team member name. You can view details about meetings that are currently in session or are scheduled for the future.



For meetings that are in session, you can click the *Join Silently* link to monitor the meeting in progress. When a manager monitors silently:

- The manager is not represented with a name, icon, or other identifying information in the Participants panel or in the Participants list that attendees view.
- As the manager enters or leaves a meeting, telephony is muted, so participants are unaware of the manager's presence.
- After the manager has joined the meeting, the manager can hear phone conversations, but cannot speak.
- The manager can read chat messages and notes, but cannot send a chat message or take notes for the group.

MONITOR A MEETING OPENLY

Sometimes managers may not want to hide their presence in a meeting. They can join and monitor a meeting openly. For meetings that are in session, they can click the **Join** link to monitor a meeting in progress. When a manager monitors a meeting openly:

- Meeting participants can hear an audible cue when the manager enters (just as they would for anyone who joins)
- The manager's name displays on the participants list for team members and attendees
- Managers can use all features available to sales team members.

CREATE A SALES MANAGER REPORT

Managers can view details about meetings run by members of their sales teams. You can create a report that shows all your sales team members or particular team members. From the Sales Manager report, you can probe more deeply and see, for a meeting run by any sales team member, a list of meeting participants, email addresses, and the arrival and departure time for each participant (sales team members and attendees).

ENDING A MEETING

Once you end a meeting, the Meeting window closes on all participants' screens. If the meeting includes an integrated voice teleconference, the conference also ends.

To end a meeting:

1. On the *File* menu, choose *End Meeting*.
2. In the confirmation message that appears, click *Yes.*

VIEWING USAGE REPORTS

If your SalesCenter Web site includes the reports option, you can view the following types of usage reports:

+ **Meeting Usage report**—Contains detailed information about each meeting that you host, including information about each participant.
+ **Access Anywhere Usage report**—Contains detailed information about the computers that you access remotely and your Access Anywhere sessions, if your site or account includes the Access Anywhere option.

To view a usage report:

1. Log in to your SalesCenter Web site.
2. On the navigation bar, click My WebEx.
3. Click *My Reports*.
4. Select the type of report you want to view.
5. Specify a range of dates for which you want to view a report and how you want
6. data sorted in the report.
7. Click *Display Report*.