

WebOffice™

Getting Started Guide

This WebOffice Getting Started Guide will help you setup your intranet site so that you may start using it right away and make it a key part of your organization. Once you have completed these steps your intranet will be a valuable resource where you and your members can easily store and share information, documents and more.

Sample WebOffice site

The screenshot displays a sample WebOffice site interface. At the top left is the Verizon logo. Below it is a navigation menu with items: Home, Shortcuts, My Favorites, Tools, Administration, Calendar, Contacts, Databases, Discussions, Documents, Expense Reports, Members, Polls, and Tasks. The main content area is divided into several modules:

- Announcements:** A lightning bolt icon, title "Announcements", and "Edit | New" link. Content: "There are no announcements."
- Tasks:** A checklist icon, title "Tasks", and "New | See All" link. Content: "There are no tasks to display."
- Calendar:** A calendar icon, title "Calendar", and "New" link.
- What's New?:** A red exclamation mark icon, title "What's New?", and "New" link. Content: "No information has recently changed or been added to the web office."
- Links:** A link icon, title "Links", and "Manage" link. Sub-sections include:
 - Public Links:** "New" link. List of links:
 - Advanced Net Conference with MSFT LM
 - Advanced Net powered by Cisco WebEx
 - Conferencing Specialist Sharepoint Site
 - Customized Net LM site
 - e-meetings Home Page
 - My Meetings Home Page
 - My Links:** "New" link. Content: "Click **New** to create a new link."
- Getting Started:** A green star icon, title "Getting Started", and "New" link. Content:
 - Lightbulb icon: "Just getting started? Get tips on setting up your web office from the [Getting Started guide](#)."
 - Question mark icon: "Have a question or suggestion? Email the [Help Desk](#) for a speedy answer to all your questions. (We love to hear from you!!)"

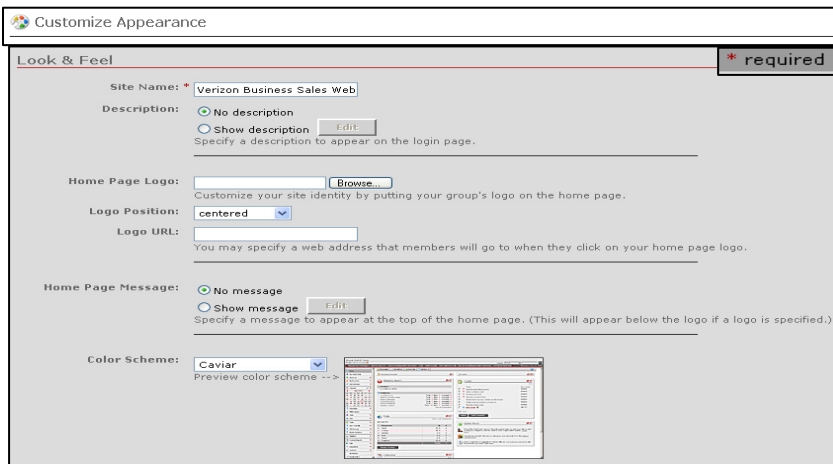
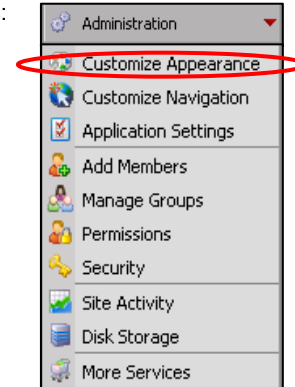
At the top of the main content area is a toolbar with icons for: Customize, Personalize, Send Email, Save Link, and Window. A calendar widget for January 2009 is also visible on the left side of the main content area.

1. Customization

Customize your intranet by adding your company logo, a homepage message and a color scheme that matches your company's colors. Easily access your existing Net Conference services by adding links to them right on your WebOffice Homepage.

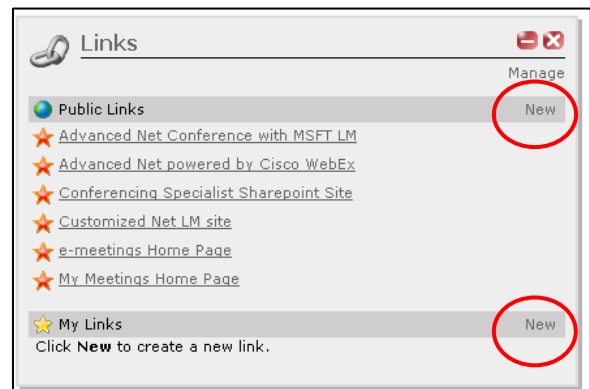
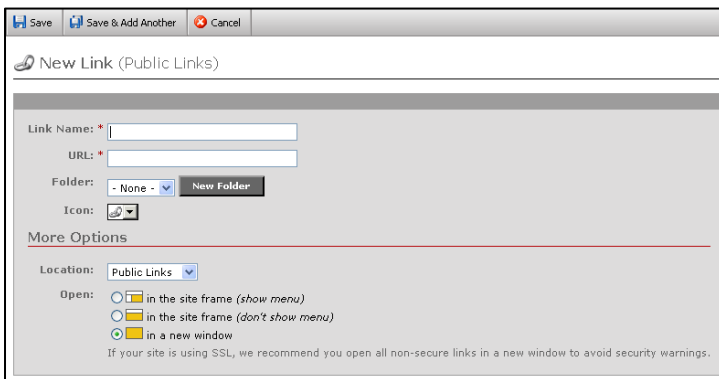
How to do it:

- Click on the **Administration drop down arrow** from the Menu and choose **Customize Appearance**
- On the **Customize Appearance** page, choose from a range of customization options:
 - Name your site
 - Write a description about your company or the purpose of the site
 - Upload your company logo
 - Specify a URL for members to go to when they click your logo
 - Write a homepage message
 - Choose a color scheme



Links:

- Decide whether you want the link to be visible by all members on your site (Public Links) or just by you (My Links).
- Click on the word **New**. The New Link window will open.
- Select the Link Name, enter the URL where the link is to be directed and select how you want the site to be displayed and click **Save**.
- Your links will be displayed in the **Links** section of your Homepage

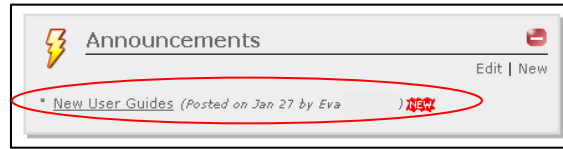


2. Post Announcements

Keep your members up to date with the latest news and information about your company. Make sure you regularly post something new and interesting to keep members' attention.

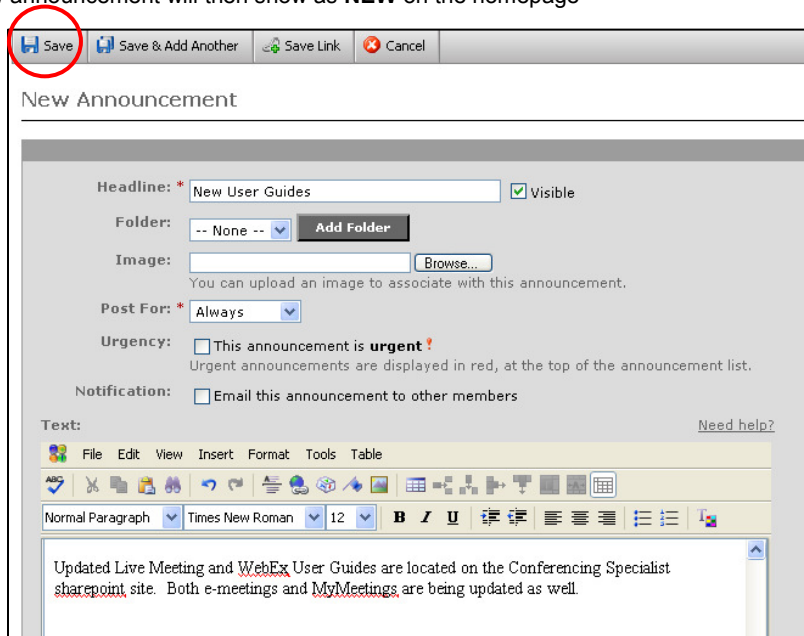
Here are some announcement ideas:

- New customers, partners or sales deals
- Last quarter's financial results
- Company benefit updates
- Photos from the company outing or holiday party



How to do it:

- Click **Announcement** on the homepage and then **New**.
- The **New Announcement** window will open.
- Complete the information and click **Save**
- Your new announcement will then show as **NEW** on the homepage



3. Post Documents

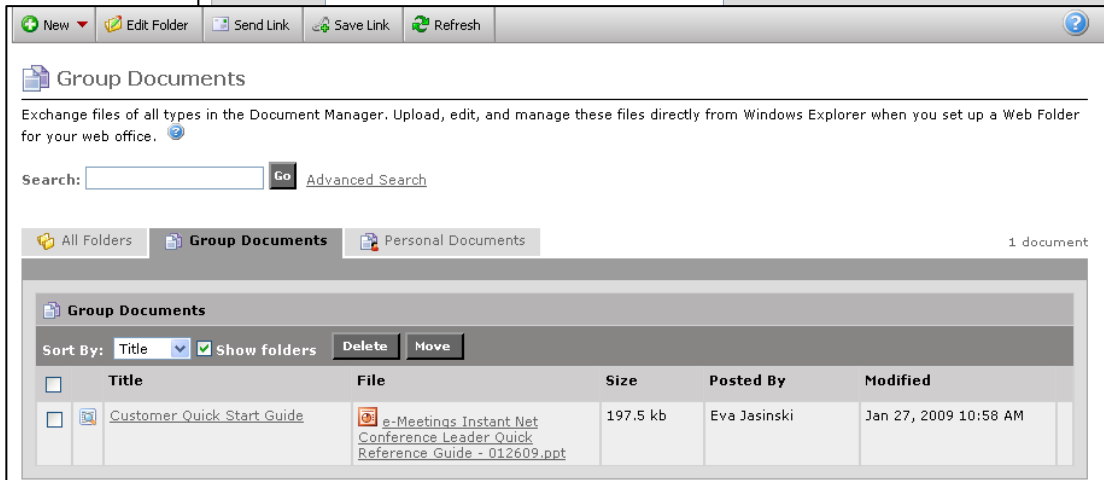
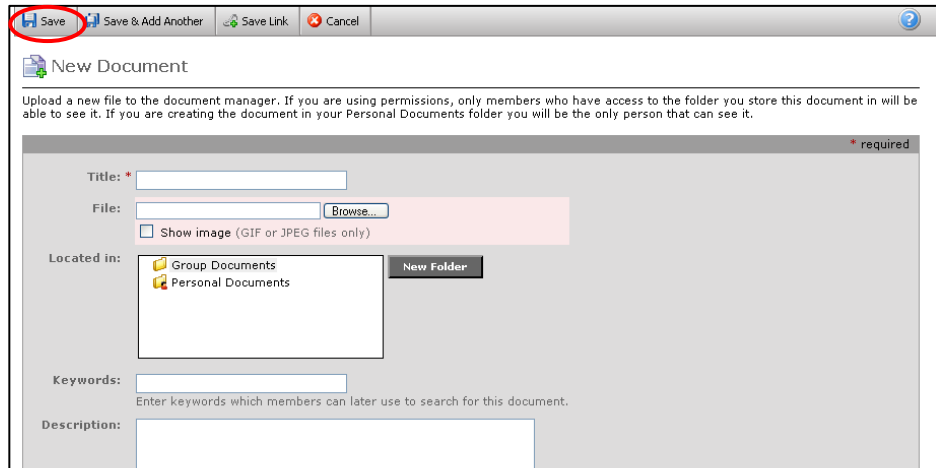
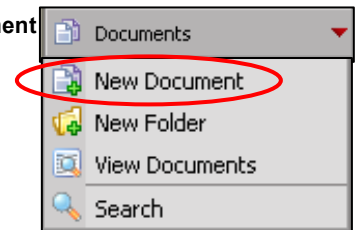
Upload some key company information that you can share with your members. This will become your central location for storing, sharing, and collaborating on documents and information. You can store many types of documents, including MS Word, PowerPoint, Excel, PDF, and more for easy access and download.

Here are some typical documents:

- Presentations
- Sales Reports
- Company HR forms
- Phone and contact lists

How to do it:

- Click the **Documents drop down arrow** from the menu and then click **New Document**
- The **New Document** window will open.
- Name and upload your document
- Add key words and a description to make searching for the document easy
- You may identify whether the document is Personal or a Group document
- Click **Save** and then click **Done**
- Go to **View Documents** on the Menu bar.
- You may view All Folders, Group Documents and Personal Documents



4. Create a Discussion Forum

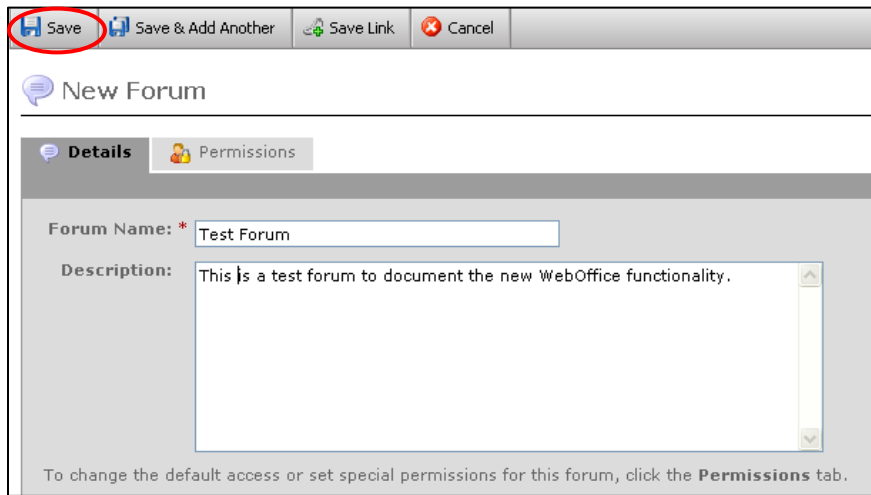
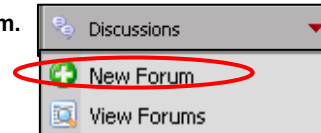
Setup a Forum where you can invite your members to voice their opinions. You can use it to get input on a wide range of topics.

Some typical suggestions are:

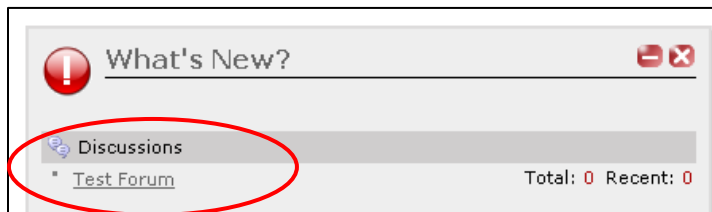
- Employee Suggestion Box
- Company outing choices
- Project feedback

How to do it:

- Click the **Discussions** drop down arrow from the menu and then click **New Forum**.
- The **New Forum** window will open.
- Name your Forum (topic)
- Click **Save**



- The New Discussion Forum will be listed under **What's New** on your homepage.

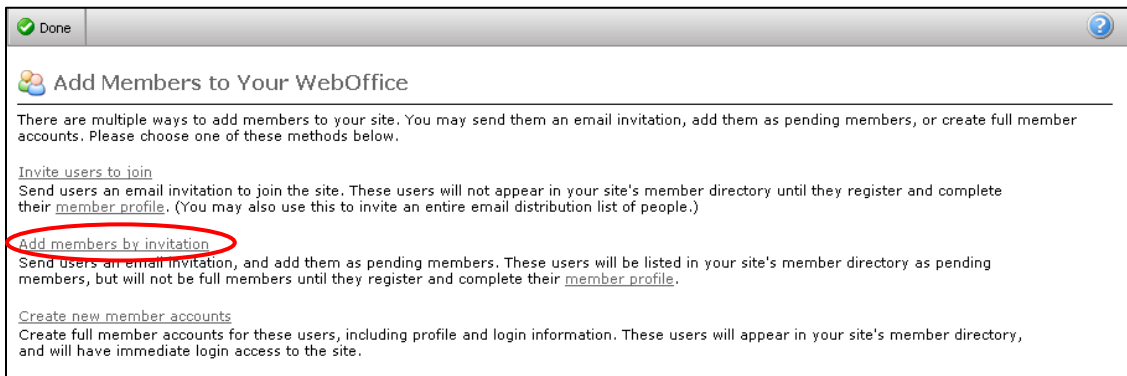


5. Add/Invite Members to Join

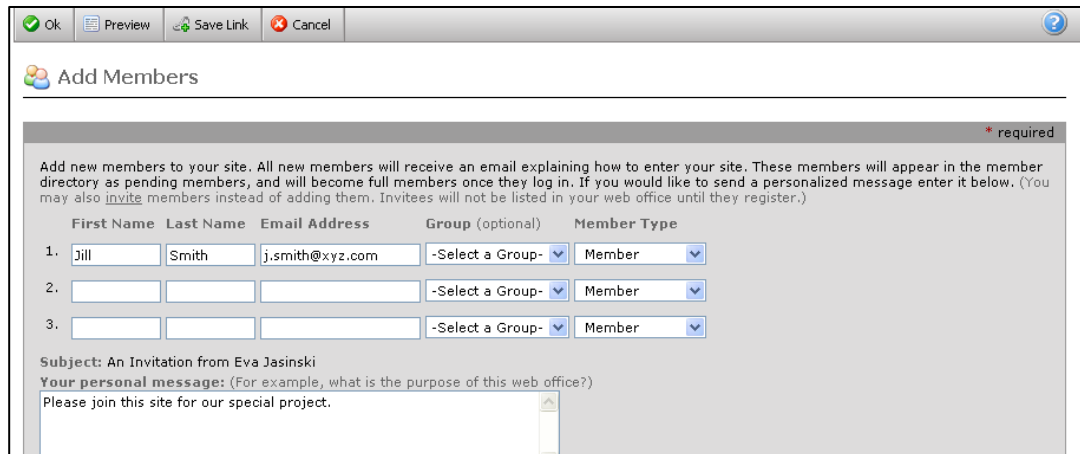
Add or Invite Members to your intranet by sending each person an invitation. Your invitation will include all of the information they need to join and get started.

How to do it:

- Click the **Members drop down arrow** from the menu and then click **Add Members**
- The **Add Members to your WebOffice** window will open.
- Select **Add members by invitation**
- Enter the information including groups, language choices, and the types of member (Admin or Member)
- Add an optional personal message.
- Click **OK**



- The potential member will receive an email invitation with a link to the site where they will register to complete their membership.

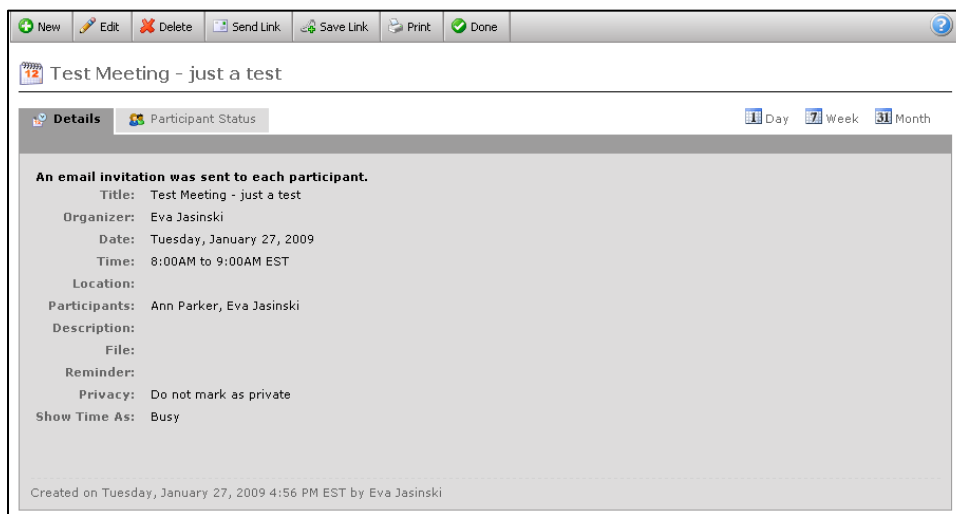
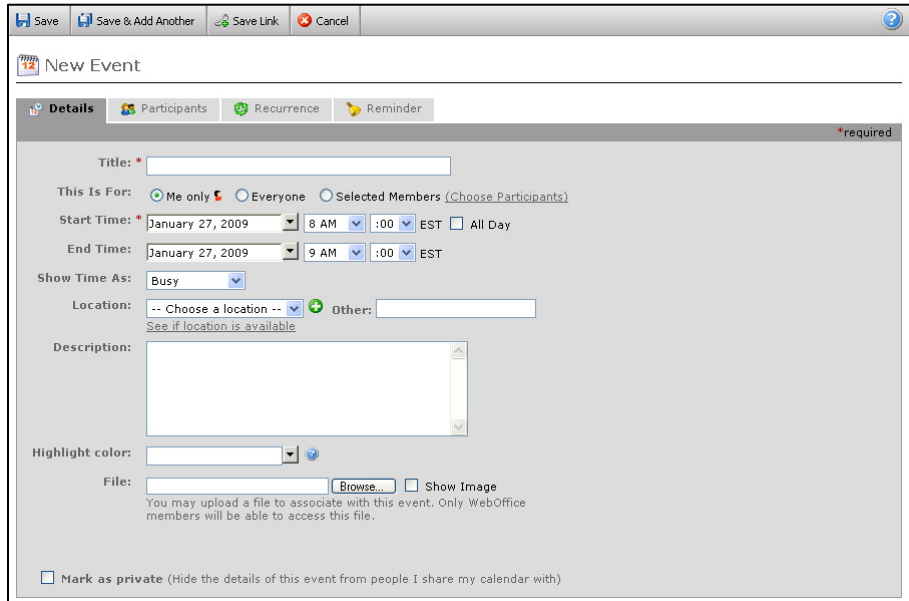
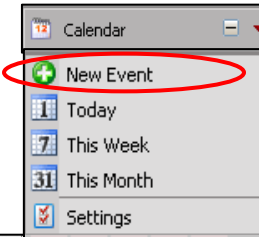


6. Creating a Meeting or Event

Once you have added members to your intranet, it is easy to schedule a meeting and invite them all to participate.

How to do it:

- Click the **Calendar drop down arrow** from the menu and then click **New Event**.
- The **New Event** window will open
- Add a **Meeting Title** and select a date and time.
- Click on **Choose Participants** to invite everyone to attend
- Check everyone's availability, then click **Save**.
- Your meeting invitation will be sent.

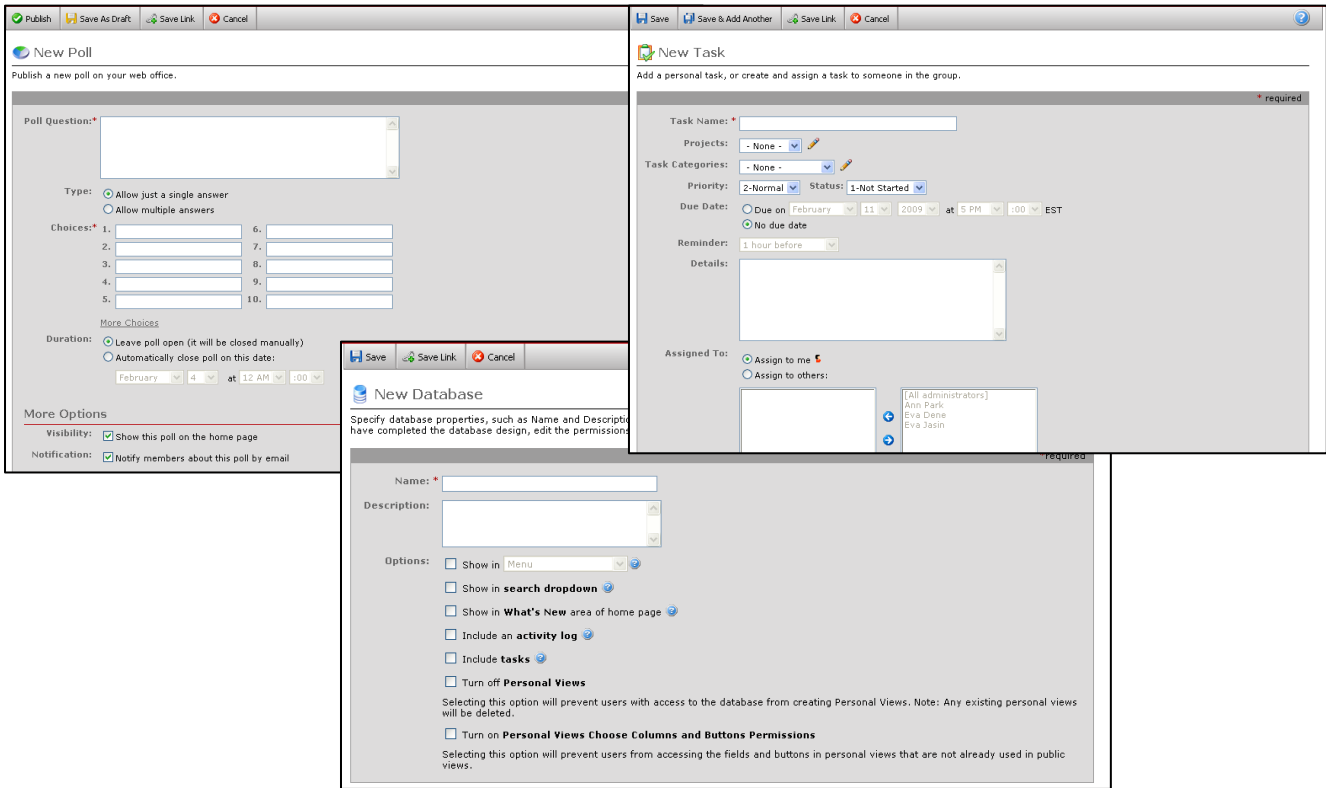


7. Other Ideas

There are many more ways you can use your intranet business tool to keep your members organized and involved.

Here are some additional tools you can start using right away:

- **Databases** – Create a database to track key information and generate reports, lists
- **Polls** - Get feedback on important issues right from your members
- **Tasks** - Track tasks from start to finish, viewing status by owner, project and more.

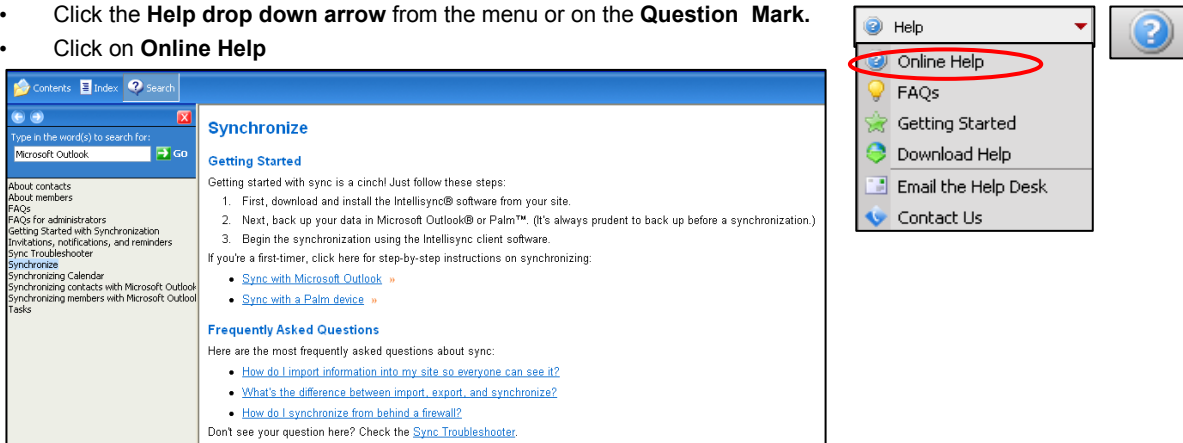


8. Online Help

There is extensive online help available for each WebOffice function.

How to do it:

- Click the **Help** drop down arrow from the menu or on the **Question Mark**.
- Click on **Online Help**

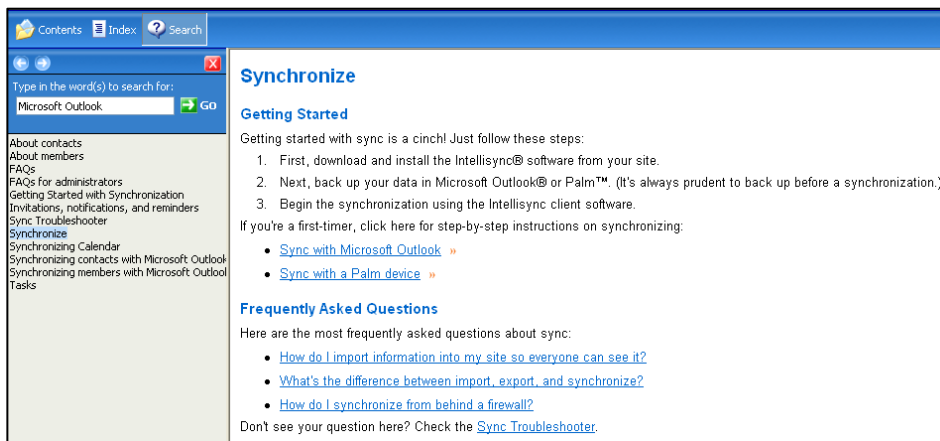
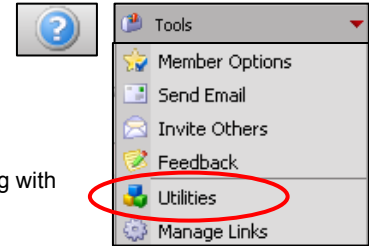


9. Synchronize with Microsoft Outlook®

You may synchronize your WebOffice site with your Microsoft Outlook® calendars, contacts and tasks. There is extensive online help available for each WebOffice function.

How to do it:

- Click the **Help drop down arrow** from the menu or on the **Question Mark**.
- Click on **Online Help** and click **Search**.
- Search for **Microsoft Outlook** and click **Go**.
- Select **Synchronize** from the list of topics and follow the instructions for Synchronizing with either Microsoft Outlook or a Palm.
- Use the **Sync Troubleshooter** for additional help.
- You may also access the Synchronization software by selecting **Tools**, then **Utilities** and finally **Synchronization**.



10. Support

Product Help Desk: 800-857-8777 or 210-795-0369 or email us at chicago-phd@verizonbusiness.com

Technical Support: 866-449-0707 or email us at nettech@verizonbusiness.com

11. Training

WebOffice University is available at: <http://www.weboffice.com/university/index.html>

Live Daily Demos: Monday – Friday between 10am and 5pm ET: <http://www.weboffice.com/EN/University/Webinars/>

Recorded Demos: Pre-recorded demos can be viewed anytime. <http://www.weboffice.com/EN/University/Recorded/>

Three WebOffice training classes available at: <http://quickstart.webex.com>

- **Member Overview** - Both Members and Admins are encouraged to take this class. The main applications of the WebOffice are covered.
- **Administrator Overview** - This is site management instruction for WebOffice Administrators. For a class on the main applications, i.e. Calendar, Documents, please attend the Members Overview.
- **Database Overview** – This instruction includes WebOffice Database facts, Templates vs. Design your own, Fields, views, and reports, and Permissions

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