

Admin / Moderator - Provisioning

CMA (and CMS) will allow configurable spaces, user profiles and roles

An Admin/ Moderator logging into user portal can;

1. Create User profile categories or groups (on CMM or Portal)

What types of users and role model work for me and my organisation.

1. How many user groups do i need?
2. Create a user group example; Host, Guest, Owner, Hands-off

2. Assign privileges to user profiles/groups/roles

	Host	Guest	Owner	Hands-off user
CMA & Member Management				
Can change host/guest passcode	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Can add/remove members from this space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can create spaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can send Invites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change Join information (and add special dial numbers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can delete a space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change a space title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can schedule Audio meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can schedule Video meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can lock a space (so only hosts can enter)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can make space searchable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change a members role (to: Host for example)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change a space default Layout	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Global User Settings				
Which templates are members allowed when they are creating new spaces a. You can create any type of space (host /guest, closed or public) b. You can create one type of template (host/guest or public or closed) b. None				
InMeeting Experience				
Can remove Participants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can present in a meeting / share screen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mute and unmute an individual participant, or all Guest participants simultaneously	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make participant important	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can record a meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can stream Video	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View diagnostic Information about your call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Meeting Chat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Participants as Guest if not already member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Turn video on/off for one or all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change layout during meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can end a meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. **Configure space settings (Provisioning either on CMM or Portal)**

	Configurations for all spaces
<input checked="" type="checkbox"/>	Host/Guest Meetings allowed
<input type="checkbox"/>	Public Meetings allowed

<input checked="" type="checkbox"/>	Closed Meetings allowed (all hosts)
<input type="checkbox"/>	Require Passcode for Host
<input type="checkbox"/>	Require Passcode for Guest
	Passcode
<input type="checkbox"/>	Passcode expire
<input type="checkbox"/>	Passcode expiry rules
<input type="checkbox"/>	New Passcode rules
<input type="checkbox"/>	Allow guest to join meeting before host
<input type="checkbox"/>	Space allows One Click meetings
<input type="checkbox"/>	Add corporate join and login page
	Assign a space layout
	Assign SIP URI for participants
	<input type="checkbox"/> Assign multiple SIP URIs
	<input type="checkbox"/> Assign One SIP URI for all participants
	Assign Multiple Meeting IDs (if yes additional configurations)
	<input type="checkbox"/> Allow separate OneClick joins for roles
	<input type="checkbox"/> Allow OneClick join for all participants
<input type="checkbox"/>	Show Call in option
<input type="checkbox"/>	Show Call me option

4. Admin will pick a user from AD/LDAP

5. Create or select from an existing space

Creating a new space

- a. Add a new space title
- b. Customise space : Add/change Avatar
- c. Make this space searchable
- d. Select a default Layout
- e. Default checked all options: Host/Guest, Public, Closed
- f. **Lock this space?**

View space information

- a. **View** space title editable
- b. Members (add more members)
- c. Layout (change)
- d. This space allows: Host/Guest, Public, Closed (can edit)
- e. Lock : Stop Guests and Public without passcode from entering
- f. Autogenerated Access Methods based on roles (Host,Guest etc) **what can a user edit?**
 - i. SIP URIs
 - ii. Meeting IDs (Space / Meeting link)
 - iii. Company join link
 - iv. Join Link with Secret (if allowed)
 - v. Passcode for Host (can edit)
 - vi. Passcode for Guest (can edit)
- g. Join Information including dial in numbers, email etc (can edit)
- h. Join button
- i. Send Invites

7. An admin can view all users join any space with ownership rights to manage an ongoing meeting

- a. At any time the Admin can rename, add and remove spaces, owners and members of a space
- b. An admin can join any ongoing meeting as host/owner
- c. An admin will get all host controls upon joining a space

8. An admin can delete any space

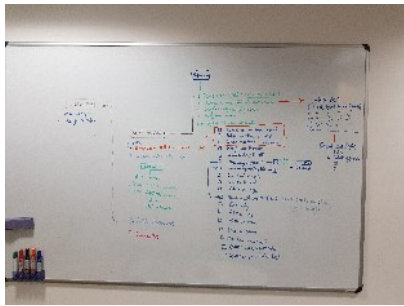
9. Add members to a space

1. Can select a user from AD
2. Select a profile for this user. The profile can give this user Host, Guest and Owner rights

10. An Admin can create space templates (when CMA supports)

11. Download diagnostic and analytics report

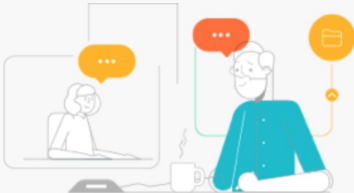
- a. An admin can download diagnostic reports
- b. An admin can generate utilisation reports



Help Section

A comprehensive help section much inline with Webex help scenarios

Video conferencing



Screen share, whiteboard, and host meetings and webinars with only one click.

Mobile



Meet while on the go and seamlessly switch to any device.

Collaboration



Work more efficiently using Webex Teams for team messaging, white boarding, and file sharing.

In Meeting Experience

Most of the IN Meeting improvements will be carried out in Phase 2.

A User with Host rights joining a meeting will get the following on screen controls;

1. Control to end meeting
2. Control to Share screen
3. Participants icon
 - a. Muting Audio and Video
 - b. Removing a participant
4. In Meeting Chat
5. Recording
6. More Controls
 - a. Showing Space /Meeting information (static dial in information)
 - b. Audio Visual settings and Join Options
 - c. Layout Control
 - d. Lock Meeting

Audio & Visual settings

User Portal will provide a section where user can;

1. Select and test Camera
2. Select and test Mic
3. Select and test Speakers
4. Select and test Video device
5. Control video and Audio quality

and save preferred devices

Login

Users have to login to User Portal using;

1. User name and password authentication will be done using secure corporate login.
2. Login should be via the ldap imported user identities (same as CMA does now). Emphasizing SSO should be stressed vs doing local ldap auth
3. The corporate login links may be provided on;
 - a. User Portal
 - b. Corporate join pages
4. Since user login and password is tied with corporate account users cannot change user name or password from within User Portal
5. User may be redirected to corporate login authentication if required

User Profile

A User profile may have;

Non editable information
pulled from AD/LDAP

1. First name and
Last name
(from
AD/LDAP)
2. Email
3. Corporate User
ID to login to
User Portal 4.
Default call me
numbers

and if possible an
editable

5. User profile
image

Search & Join

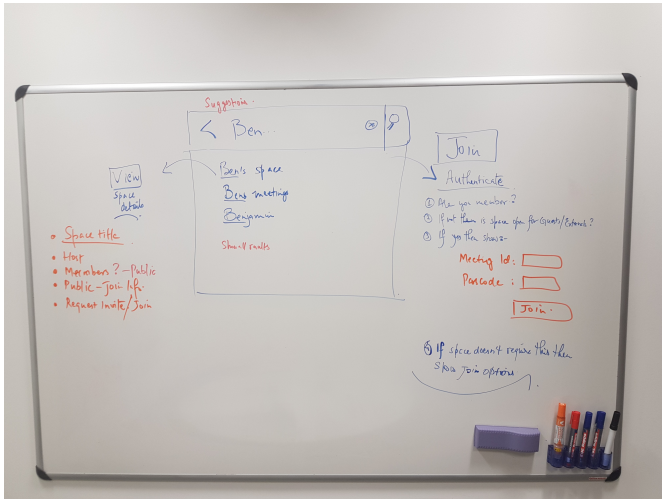
User Portal Search will allow searchable spaces to be searched by the user using;

1. Space name
2. Meeting ID
3. Host or Member (if searchable and not restricted)

Search Suggestions

1. If the user is searching for a space title then suggestion will show space titles with sip address showing the search term in bold.
2. If the user is searching for meeting ids then meeting id will be the accompanying information displayed along with the Space title.
3. If the user searched for member or host and it matches both Space title and member names then the results will show the search term in bold for space title and members both. Where it matches Space title the search will have SIP as supporting information and when it matches a member's name then the member name will be shown in bold.

Search Results



1. Join a meeting from within the Search if user has host or guest passcode or if the space doesn't require passcodes
2. list all searchable spaces whether he is a member of the space or not
3. have limited information on a space he's not a member of. Example Members of that space may be hidden
 - a. If a user tried to join a space he is not a member of he can join as Guest providing passcode (if required by company policy)

Access Methods and Join Information

Access Methods

Through provisioning a user can provide policy for Access methods to be used.

- User may have separate user groups
- Separate users (groups) may have separate Access methods
- Access methods may be associated with Call leg profiles
- A user may have one or different meeting id's, passcodes and sips for different users

A customer may have none, one or many Access methods and our solution supports all scenarios

Host	Meeting ID:	111509
	Passode:	123500
	Video:	host@acano.space
Guest	Meeting ID:	111509
	Passode:	123500
	Video:	host@acano.space

Join Information within an invite will have

1. An email invitation that can be used as signature
2. An email that can be shared in outlook
3. An invite that can be copied and pasted in any application
4. A link that can be shared
5. A phone number that can be shared with invitees

Invitations and joining a space

A User can send invitations to join;

1. Using Outlook Signatures with predefined Access Methods
2. Using corporate Join page requiring
 - a. Meeting ID
 - b. Screen name
 - c. Passcode (if required)
3. Using one click join requiring
 - a. Screen name
4. Copying and sharing space link using chat tool, email or direct input into a device of your choice
5. Phone
6. Video Systems using Sips
7. User Portal
 - a. A member can join a meeting by clicking on join button within the space
 - b. A member/owner can send invite from within the space
 - i. Generating and sending email with Access Methods
 - ii. Copying and sharing space link
 - c. A guest not a member of a space can search for a space and join if
 - i. the space allows public
 - no passcode access
 - ii. the member has guest passcode
8. Members joining a space using User Portal
9. [A user can request to join a space](#)
10. In CMS today there are four types of 'users' in a meeting

-Joined by dialing Space URI or via callID from IVR (Space Definitions) – permissions set by space and systemProfile settings

-Joined via CMA authentication and picking space – permissions set by member settings, space, and systemProfiles

- Joined via Access Method – permissions set by access method, space, and systemprofiles

- Joined via webbridge guest – permissions

Join Options

1. Every user entering a space will get a prompt to confirm the following Join Options;
 - a. Audio Options
 - i. I will call in using a phone number
 - ii. Computer Connect
 - iii. Video device
 - b. Video Options
 - i. Built in camera ii. Video systems
2. Connecting with devices in the room
3. User can save last used settings as default
4. Audio and Video will provide options to test sound and video
5. User can select Audio and visual settings
6. Even if a user is coming from a user portal he will get to see join options
7. If the settings are preset as default user portal interface will open preferred options so user can confirm

Pin / Passcodes

1. User with privileges can change and create Passcode templates
2. Admins can create and save passcode templates
3. Passcodes are applied to spaces but are not compulsory
4. Passcode will follow user (Cisco) policy rules;
 - a. Minimum length
 - b. Expire in <user input> no of days
 - c. Can be all numbers
 - d. It can't contain sequential digits, such as 123456, or repeat a digit 6 times, such as 111111.
5. Passcode may define various experiences based on admin selection could be Host, Guest, Presenter, Owner
6. In future we may add One time passwords to secure meeting invites

Steve:

"Passcodes are applied to spaces but are not compulsory"

Actually this is an area where we could add significant value to the base product. Many installations want to ensure all spaces require spaces can not be used without a valid user present (avoid fraud, abuse, etc). Requiring all spaces have a PIN is one way to do that, or require all spaces have a PIN or be in host/guest mode where host has a PIN. Customers like Cisco IT have had to build custom policy enforcement to require that. It should be something we should enforce in the space creation/edit system. Admins should be able to toggle a system wide policy for self-managed spaces

Passcode expiration and policy – This requires a lot more around it and may be out of scope for this in early releases

Members: Owners, Hosts and Guests

1. A member can be any profile based on Admin's choice of profiles;
 - a. Host
 - b. Guest Member
 - c. Owner
 - d. Presenter
2. A user creating multiple spaces will have his profile settings inherited to the new space
3. An admin can create and configure a space and add users with these profile settings applied
4. A non member can request to be added to a space
 - a. The request will be pending with the space admin/owner
 - b. A Pending member will not join a meeting till invitation is pending

CMA – Spaces

A CMA Space;

1. May have an owner, admin and others with varying profiles and settings
2. Latest visited to be shown on top
3. Can have multiple permissions level
4. Will be configurable (perhaps through CMM based on management decision)
5. May have no members as incase of public spaces used for Adhoc events
6. May or may not have a space ID/URI
7. URI will be autogenerated
8. May have multiple space IDs based on Admin configuration
9. May have a Host passcode access if Admin implements such a policy
10. May have a Guest passcode access if part of the policy
11. A name and title for the space which will be unique
12. Can have multiple or no Access Method
13. An admin can allow Access methods to be changed
14. Can allow following types of meetings based on Admin selection;
 - a. **Host / Guest meetings**
 - i. Host and Guest both will require a separate passcode to join. The passcode will define host and guest experiences
 - ii. Host and Guest may have separate OneClick links with secret passcode and meeting id embedded allowing them relevant
In Meeting
experience iii.
Host required
to enter a
passcode while
user dont
 - b. **Public Meetings (requiring no passcode)**

If a space allows this type of meeting then Host and guest can both join the space without requiring a passcode for video or audio

 - c. **Closed Meeting (All host pins)**

If a space allows this type of meeting then all participants will have same rights it can be an all heads meeting with all equally important members

If the user deselected Host/Guest and Public and only have this option selected then

 - i. Previously used Guest passwords will become ineffective
 - ii. External or Internal Guest access will be revoked
15. Will allow admin to configure settings for users (as part of call leg profile) example;
 - a. Host
 - b. Guest
 - c. Owner
16. Can be deleted or removed
17. Can be locked by the user so that it doesn't allow any guest access to the space
18. May or may not allow Guest access
19. May or may not allow passcode to be changed
20. Can have a set recording mode for the space (automatic, manual, disabled)
21. Can have a streaming mode of the space (automatic, manual, disabled)
22. Can tag a space as "favourite" allowing the space to be shown on top of the spaces list (**amend**)
23. **There can be a layout associated with a space(amend)**
24. May or may not be searchable. Some users don't want their spaces to be searchable hence this could be a setting which is part of every new space creation
25. is Viewable
26. Can create space templates (may not be for first release)
 - i. These may be based on templates shared above
 - ii. These may have other configuration like;
 1. Can guest join meeting without host
 2. Access methods to use with this space
 3. Passcodes
 4. Layout
 5. Recording
 6. Autolock meetings

Power User

A Power User is a profile with settings assigned by the Admin. A power user can;

Create a space

Creating a new space

- a. Add a new space title
- b. Make this space searchable
- c. Select a default Layout
- d. Default checked all options: Host/Guest, Public, Closed

View space information

- a. View space title editable
- b. Members (add more members)
- c. Layout (change)
- d. This space allows: Host/Guest, Public, Closed (can edit)
- e. Lock : Stop Guests and Public without passcode from entering
- f. Autogenerated Access Methods based on roles (Host, Guest etc) **what can a user edit?**
 - i. SIP URIs
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- g. Join Information including dial in numbers, email etc (can edit)
- h. Join button
- i. Send Invites

2. Add members to a space

1. Can select a user from AD
2. Select a profile for this user. The profile can give this user Host, Guest and Owner rights

3. Can create space templates if allowed (when CMA supports)

If Admin allows as part of the user profile;

1. A power user can change passcodes
2. A power user can create multiple spaces
3. A power user can delete any space
4. A power user will have all the rights as allocated by the admin

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5. Assign one of the user groups/profiles/roles to the user

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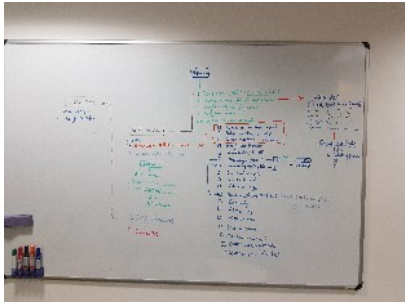
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Can remove Participants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can present in a meeting / share screen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mute and unmute an individual participant, or all Guest participants simultaneously	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make participant important	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can record a meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can stream Video	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View diagnostic Information about your call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Meeting Chat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Participants as Guest if not already member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Turn video on/off for one or all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can change layout during meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can end a meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. **Configure space settings (Provisioning either on CMM or Portal)**

Configurations for all spaces	
<input checked="" type="checkbox"/>	Host/Guest Meetings allowed
<input type="checkbox"/>	Public Meetings allowed

<input checked="" type="checkbox"/>	Closed Meetings allowed (all hosts)
<input type="checkbox"/>	Require Passcode for Host
<input type="checkbox"/>	Require Passcode for Guest
	Passcode
<input type="checkbox"/>	Passcode expire
<input type="checkbox"/>	Passcode expiry rules
<input type="checkbox"/>	New Passcode rules
<input type="checkbox"/>	Allow guest to join meeting before host
<input type="checkbox"/>	Space allows One Click meetings
<input type="checkbox"/>	Add corporate join and login page
	Assign a space layout
	Assign SIP URI for participants
	<input type="checkbox"/> Assign multiple SIP URIs
	<input type="checkbox"/> Assign One SIP URI for all participants
	Assign Multiple Meeting IDs (if yes additional configurations)
	<input type="checkbox"/> Allow separate OneClick joins for roles
	<input type="checkbox"/> Allow OneClick join for all participants
<input type="checkbox"/>	Show Call in option
<input type="checkbox"/>	Show Call me option

4. Admin will pick a user from AD/LDAP

5. Assign one of the user groups/profiles/roles to the user

6. Create or select from an existing space

Creating a new space

- a. Add a new space title
- b. Customise space : Add/change Avatar
- c. Make this space searchable
- d. Select a default Layout
- e. Default checked all options: Host/Guest, Public, Closed
- f. Lock this space?

View space information

- a. View space title editable
- b. Members (add more members)
- c. Layout (change)
- d. This space allows: Host/Guest, Public, Closed (can edit)
- e. Lock : Stop Guests and Public without passcode from entering
- f. Autogenerated Access Methods based on roles (Host, Guest etc) what can a user edit? i. SIP URIs
 - ii. Meeting IDs (Space / Meeting link)
 - iii. Company join link
 - iv. Join Link with Secret (if allowed)
 - v. Passcode for Host (can edit)
 - vi. Passcode for Guest (can edit)
- g. Join Information including dial in numbers, email etc (can edit)
- h. Join button
- i. Send Invites

7. An admin can view all users join any space with ownership rights to manage an ongoing meeting

- a. At any time the Admin can rename, add and remove spaces, owners and members of a space
- b. An admin can join any ongoing meeting as host/owner
- c. An admin will get all host controls upon joining a space

8. An admin can delete any space

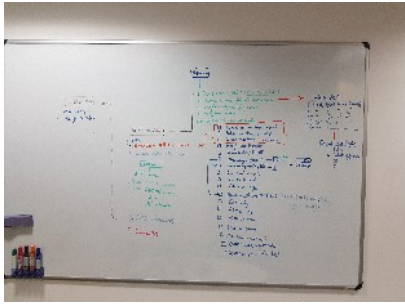
9. Add members to a space

1. Can select a user from AD
2. Select a profile for this user. The profile can give this user Host, Guest and Owner rights

10. An Admin can create space templates (when CMA supports)

11. Download diagnostic and analytics report

- a. An admin can download diagnostic reports
- b. An admin can generate utilisation reports



Hands off / Executive user

Hands off executive users don't want extra features and functionality. These may be teachers, doctors, directors etc

A hands-off user;

1. This user also comes to the portal just to figure out what their dialing information is (without necessarily emailing a new invite)
2. Users come here to manage their PINs – so if there is any policy/enforcement on pin expiration, etc – that's why they come here
3. These users are likely just to only use their auto provisioned space and not need other spaces
4. They may want to join a space/meeting
5. Send an invite or share join information for their sole space

CMA users and their needs

Personas

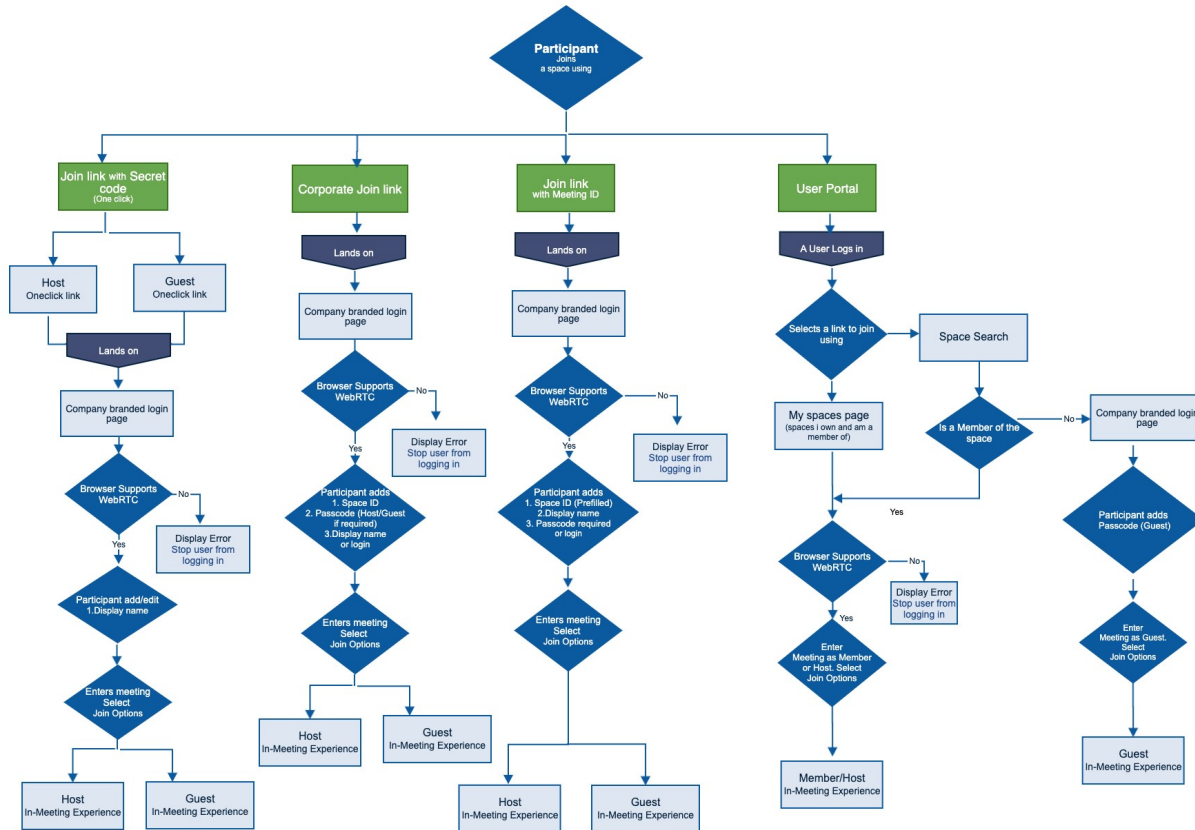
Hands-off users (Basic technical knowledge)	Advance technical users	Admins
<p>User creation, management</p> <p>N/</p>	<p>User creation, management</p> <p>N/</p>	<p>User creation, management</p> <ul style="list-style-type: none"> . Add Users from AD/ User groups . Apply settings /profiles/ privileges to user . View users and their spaces (join a space when required)
<p>Space management</p> <ul style="list-style-type: none"> . Wants only pre-defined access methods which they can use in their emails or invites . Don't want to change meeting templates or layouts . Don't worry about passcode or changes . Only need one space <p>InMeeting experience</p> <ul style="list-style-type: none"> . All In Meeting actions allowed by Admin . Most vulnerable, needs simple experience and may seek expert help if stuck 	<p>Space creation and management</p> <ul style="list-style-type: none"> . Create multiple spaces . Assign members to space . Can apply and change space settings passcode changes, lock, layout . Can change passcode . Can change join information <p>InMeeting experience</p> <ul style="list-style-type: none"> . All In Meeting actions allowed by Admin . Capable of dealing with slightly technical situations but not as technical as admins. 	<p>Space creation and management</p> <ul style="list-style-type: none"> . Create multiple spaces . Assign members to space . Apply rules, security, settings to a space (passcode changes, one click) . Create passcode templates need to explore further) . Create Access method templates
		CMA Analytics and reporting

The Join Process

The Space may have the following configurations:

1. Host / Guest meetings
2. Public Meetings (requiring no pin)
3. Closed Meeting (All host pins and all guest pins)

Video and Phone Journey



User Portal - Design requirements

Personas: What can I use this for?

- **Admin / Moderator** (Provisioning)
- **Power user**
- **Hands off / Executive user**

What do I need to accomplish my tasks?

1. **Spaces**
2. **Passcodes**
3. **Members: Owners, Hosts and Guests**
4. **Join Options**
5. **Invitations and Joining a space**
6. **Access Methods and Join Information**
7. **Search and Join**
8. **User Profile**
9. **Login**
10. **Audio & Visual settings**
11. **In Meeting Experience**
12. **Help Section**
13. **Provisioning**