

Customer Care Message

Export & Backup Guide

Welcome to the WebOffice and WorkSpace export and backup guide. This guide provides an overview and requirements of the tools available to extract data from your WebOffice or WorkSpace site. This documentation is intended for Administrators and Members of WorkSpace or WebOffice sites. The level of expertise required will range from easy to use to moderate difficulty depending on the tool being used. This document also provides a definition of tools and explains which tool to use in different scenarios.

Contents

I.	EXPORT & BACKUP OPTIONS	2
	Definition of Tools.....	2
II.	BACKUP TOOL (NEW).....	3
	WHAT'S NEW: Backup Tool for WebOffice/Workspace.....	3
	What you need to get started using the new tool.....	4
	Initiating the Backup Request on your site.....	4
III.	Setting Up & Configuring FTPS Clients.....	5
a.	WinSCP.....	5
	Client Installation Requirements.....	5
	Downloading the WinSCP Client.....	5
	Installing WinSCP.....	6
	WinSCP Quick Start.....	6
	Transferring Files with WinSCP.....	7
b.	FileZilla.....	7
	Windows.....	7
	Downloading FileZilla for Windows.....	7
	Installing FileZilla for Windows.....	7
	FileZilla for Windows Quick Start.....	8
	Transferring Files with FileZilla for Windows.....	8
	Mac.....	9
	Downloading FileZilla for Mac.....	9
	Installing FileZilla for Mac.....	9
	FileZilla for Mac Quick Start.....	9
	Transferring Files with FileZilla for Mac.....	10
	Frequently Asked Questions	11

Customer Care Message

I. EXPORT & BACKUP OPTIONS

WebOffice/ Workspace services have several types of export tools that enable both Members and Administrators to transfer data off of their site. These are the most common ways to backup or remove data.

The main difference between **Member** and **Admin** export capabilities is the *permission-level* to certain data types:

Members have the ability to:

- Export their “personal” data, such as their personal Contacts, Calendar, Discussions, Polls, Expense Reports and Tasks.
- Export specific Database views if they have permission to the database view.
- Download their Personal documents and any Group documents they have permission to access.

Admins have the ability to:

- Export group data, such as group Discussions, Polls, and Tasks and all Databases, regardless of permissioned access.

Note: It is recommended that individual users download their own expense reports and tasks.

What’s **new this year** is that we have added an **Export** function to several applications on the service:

- Calendar
- Expense Reports
- Discussion
- Polls
- Tasks

Below is a **matrix** of available Export and Backup Tool options on the suite of applications:

Application	Export	Other	Backup Tool (New)
Calendar	x		
Contacts	x		
Discussions	x*		x**
Database	x*		x
Group Documents		Web Folders	x
Public Documents		Web Folders	x
Personal Documents		Web Folders	x
Expense Reports	x		
Polls	x		
Tasks	x		
WebEx Meeting (Usage Details)	x		

*Discussions & Database Export tool does not download attachments

**The Discussions backup tool only backs up discussion attachments.

Tool notes:

Export tool notes: All export tools will generate a real-time file in the format of your choosing: CSV or TXT. CSV files can be viewed in a spreadsheet editing application such as Microsoft Excel.

Backup tool notes: All backup tools will generate a password protected 7-Zip file that is stored on the FTPS server. Backup requests are not immediate; the time it takes to process the backup request will vary based the amount of content being backed up and server load. Database backups will include all database columns and database attachments. Document backups will include all documents stored in the selected repository. Database backups include a text file that displays which attachments belong to which database records. Document backups include a text file that you can use to correlate the numbered folders to the original directory structure. It is recommended that this text file be viewed in a spreadsheet editing application, such as Microsoft Excel.

Definition of Tools

Tool name	Who can use the tool	Tool Definition
Calendar Export	Members & Admins	This tool exports all visible calendar entries in the current view. For example, if you are looking at the weekly calendar, all visible items for the week will be exported.
Contact Export	Members & Admins	This tool exports all contacts visible to your account on the Contacts page.

Customer Care Message

Discussions Export	Members & Admins	The Discussions Export tool will export all visible forums and responses. Note that this tool does not export discussion attachments. An administrator can backup discussion attachments by navigating to the Documents section of the site and clicking the Backup button. Once on the Document Backup page, check the Discussions box and then click the Backup button.
Database Export	Members & Admins	The Database Export tool will export the current database view. Columns that are not visible in the currently selected view and database attachments will not be exported.
Database Backup	Admins	This tool should be used to backup an entire database including all database attachments. The Database Backup tool will start a job to create a 7-Zip file on the FTPS server containing the entire selected database and all items attached to the database. Each database will be contained in a separate 7-Zip file.
Documents Backup	*Members & Admins	Members can only backup their personal documents using this tool. An admin may backup their personal documents, and all Public & Group documents on the site. The Documents Backup tool will start a job to create a 7-Zip file on the FTPS server containing the selected documents. Each document backup (Group/Public/Personal) will be a separate 7-Zip file. Note that Document Backups will not retain the original folder structure. If you would like to export your documents and retain the original folder structure, download your documents via Web Folders
Documents (Web Folders)	Members & Admins	Members can download all of their personal documents and any public or group documents they have permission to access. Admins can download all of their personal documents and all of the group and public documents on the site. For steps to setup Web Folders for your operating system, refer to the following Knowledge Base article: http://kb.webex.com/WBX27436 . Documents can be downloaded in real-time once Web Folders have been setup.
Expense Reports Export	Members & Admins	The Expense Reports export tool will export a file containing all Expense Reports visible to your account.
Polls Export	Members & Admins	The Polls export tool will export a file containing all Polls visible to your account.
Tasks Export	Members & Admins	The Tasks export tool will export a file containing all Tasks visible to your account.
WebEx Meetings Usage	Members & Admins	A WebEx Meeting Usage Report provides information about past meetings you've held. To generate a Usage Report, navigate to the WebEx Meetings section of your site, then select Options > Reports. On the Usage Reports page, enter a date range, select a method to sort by, then click the Display Reports button.

II. BACKUP TOOL (NEW)

WHAT'S NEW: Backup Tool for WebOffice/Workspace

Thanks to your past requests, WebOffice/Workspace services can now provide a more robust self-service backup option for its most popular applications – Documents, Database, and Discussion Attachments – one that's more suitable for larger, more complex data export needs.

Customer Care Message

If you have a large database or whole set of databases that needs all records backed up, or have too many files and folders in your Documents section that make the more traditional Web Folders file transfers a challenge, then the “new” **Backup Tool for WebOffice / Workspace** using an FTPS client may be your preferred data export/backup solution.

Who can use the backup tool?

To ensure that your backup needs follow similar permission structures on your WebOffice applications, for any site-level data backup, such as all Group folders or all records on a given database, only Administrators may have this level of access.

How technical do I need to be?

The backup tools require moderate technical expertise and are intended for administrators. For each recommended FTPS clients, step-by-step instructions are supplied in this guide.

We recommend that you read through this guide carefully and read our Backup FAQ section.

What you need to get started using the new tool



In order to take advantage of the new Backup Tool feature, you will need to download & install a 3rd party FTPS client. If you are not comfortable using 3rd party FTP software (or have policies that restrict the use of FTPS clients on your network), then we don't recommend you take this route for backup.

The available Export/Web Folder tools discussed in Section I. are the most commonly used data export options.

Recommended FTPS Clients

To support secure file transfer over FTPS, Cisco WebEx recommends the following FTPS clients:

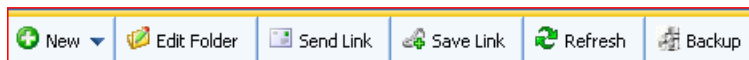
WinSCP
FileZilla for Windows
FileZilla for Mac

These are *free, open-source* FTPS clients that are readily available on the web for download. Refer to the Setting Up & Configuring FTPS Clients portion of this document for additional information.

Important: Please be fully aware that Cisco doesn't own or support these recommended FTP clients.

Initiating the Backup Request on your site

1. Login to your WebOffice/ Workspace site.
2. Navigate to the application that you want to backup:
 - Documents (Note: Discussion attachments can be downloaded from the Documents Backup page)
 - Database
3. Click on the **Backup** button.



4. Select among the **checkbox** options for backup – optional selections

If **Documents or Discussions**-- select Group, Personal, Public, Discussions, or all items

<input type="checkbox"/>	Document Type
<input type="checkbox"/>	Group
<input type="checkbox"/>	Personal
<input type="checkbox"/>	Public

Customer Care Message

If **Database** -- select the Database(s) you want to backup, or all items

5. Click the **Backup** button.



This starts the server-based backup job, and the page will now show "Pending" status in the backup status field. After submitting the request it is ok to navigate away from the page and do other activities on your site.

Note: No backup files will be downloadable from your site; this is where having the FTP client installed on your PC or Mac is an important next step.

6. Use one methods below to check the backup job status:

a) "Backup Status" field on the table will start with a Pending Status and then move to "Success" if the job is successfully completed.

b) You've received a backup confirmation from notify@webexone.com

Once you see the job is successful or you've received backup confirmation email, you are ready to go to the next section.


Special Note: *The expected amount of time for backup jobs to be completed will vary based on a number of factors:*

a) *the size of your backup job*

files/ total size of files

databases / # records on database, etc

b) *the aggregate volume of similarly requested jobs being made by other WebOffice customers at the same time (known as server load)*

To help offset potential server load during peak periods, we are limiting the number of backup job requests for the same content (i.e. database ABC) to once every 7 days. To check when you can perform the next backup, navigate to the Backup page. For Database backups, the days remaining before you can initiate another backup is listed in the Backup Request Submitted column. For Document and Discussion Attachment backups, this days remaining before another backup can be initiated is listed in the Backup Submitted At column. The calendar  icon will list the number of days left before you can initiate another backup. Mousing over this icon will display the exact time you can start another backup.

III. Setting Up & Configuring FTPS Clients

a. WinSCP

WinSCP is freeware supporting three file transfer protocols; SFTP, FTP and SCP. SFTP and SCP use SSHs FTP (SSH File Transfer Protocol), SCP (Secure Copy) client for Windows using SSH (Secure Shell). Its main function is safe copying of files between a local and a remote computer.

Client Installation Requirements

WinSCP runs on Microsoft Windows 2000 and newer, up to Windows 8/Windows Server 2012. It runs both on client and server editions of Microsoft Windows. Documentation and frequently asked questions can be found at <http://winscp.net/eng/docs/start>.

Downloading the WinSCP Client

To download the WinSCP client, navigate to http://download.cnet.com/WinSCP/3000-2160_4-10400769.html and click the **Download Now** button. You should save the installer to an easily accessible location such as your Microsoft Windows desktop or your *My Documents* folder.

Customer Care Message

Installing WinSCP

Note: An online installation guide for WinSCP can be found at <http://winscp.net/eng/docs/installation>.

1. Open the installation program by double clicking on it's icon.
 - **Note:** Your computer might display a security warning prior to installation. Click Run to start the installation.
2. Select the installation language that you wish to use.
3. Review the *Welcome* and *License Agreement* screens and click **Next**.
4. Select a setup type. For basic setup, choose **Typical Installation**.
5. You will be prompted for *Initial User Settings*. This mainly allows users to select their preferred user interface style. The *Explorer interface* is recommended for first time users of WinSCP. For users who are familiar with file managers like Total Commander, Servant Salamander or Norton Commander, it is recommended that you keep the default *Commander Interface*. *Initial User Settings* can be changed later.
6. After selecting the interface, *the Ready to Install screen* opens. On this screen, you can review the installation options you have selected. Click **Install** to start the installation process.
7. A brief installation process will take place. You may have to restart your computer. If you choose not to restart, some WinSCP functions may not be available until you do so. When installation is complete, a WinSCP icon will appear on your desktop.

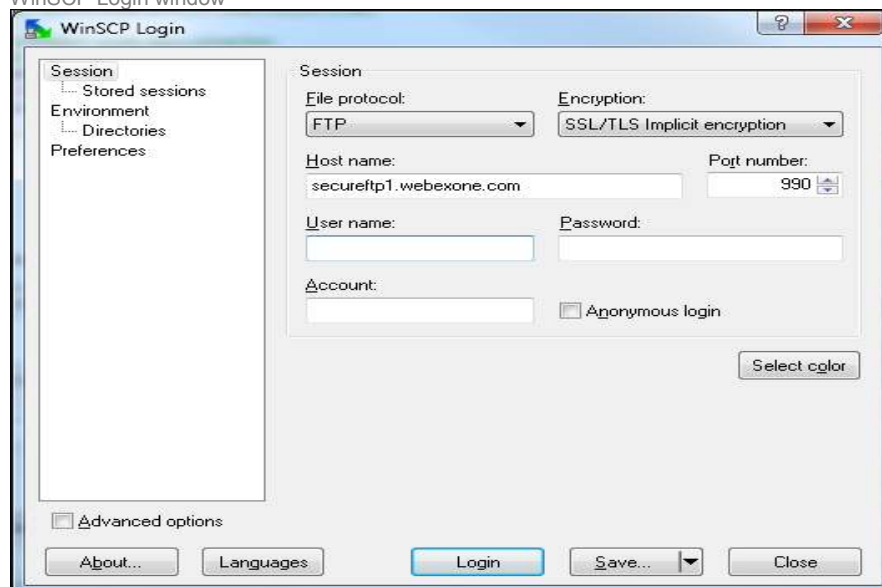
WinSCP Quick Start

1. Double-click the **WinSCP** icon on your computer's desktop to launch the WinSCP client.
2. WinSCP will prompt you for your login information. The first time that you login, you will only need to enter the Host name, your FTPS user name, password and select the server's protocol (FTPS). This information will be stored within the client the next time you launch WinSCP.
 - File Protocol: FTP
 - Encryption: SSL/TLS Implicit encryption
 - Host Name: **secureftp1.webexone.com**
 - Port number: 990
 - User name: (Refer to the Database or Documents backup page to obtain your username. See the example admin username below.)

FTPS Backup Site:	secureftp1.webexone.com
FTPS Admin Login:	yoursite.webexone.com\YourUsername\admin
FTPS Password:	Your password is the same as your current WebOffice or Workspace account site

- Password: Your WebOffice/Workspace account password

WinSCP Login window



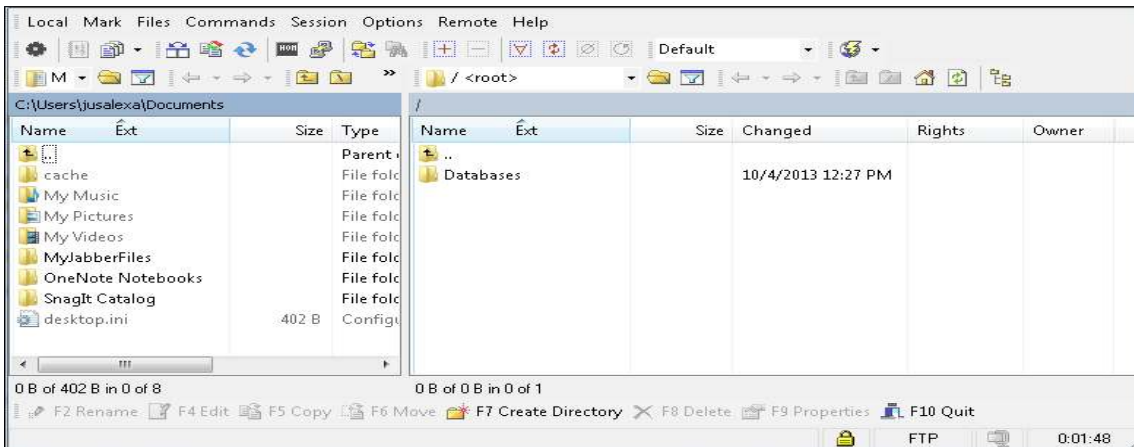
Customer Care Message

3. Click the **Save** button, then enter a name for the connection.
4. Optionally, check the **Save password (not recommended)** box.
5. Click **OK**.
6. Next, click **Login**.
7. When the warning dialog appears, click the **Yes** button.
8. You are now ready to begin using WinSCP to transfer files between the remote server and your local files.

To reconnect to the FTPS server at a later time, open WinSCP, select the entry created for your site, then click the **Login** button. If you didn't opt to have WinSCP store your account password, you will need to enter your WebOffice/WorkSpace password when connecting.

Transferring Files with WinSCP

After logging in, the data structure of your remote server account will be displayed in the right window. Your local files will appear in the left window. On the left-side of the window, browse to the folder you would like to save the files to, then drag and drop files from the remote server to your local file system.



b. FileZilla

FileZilla Client is a free, open source FTP client. It supports FTP, SFTP, and FTPS (FTP over SSL/TLS). The client is available under many platforms, binaries for Windows, Linux and Mac OS X are provided. FileZilla comes in three versions. The features of FileZilla can be reviewed here. An online FileZilla User Guide can be found here.

Client Installation Requirements

FileZilla runs on Windows, Linux/Unix or Macintosh. The executable file will vary depending on the operating system. Documentation and frequently asked questions can be found at <https://wiki.filezilla-project.org/Documentation>.

Windows

Downloading FileZilla for Windows

To download the FileZilla client, navigate to <https://filezilla-project.org/> and select the "Download FileZilla Client" button. Click the **Download Now** button to start downloading the installation file. You should save the installer to an easily accessible location such as your Microsoft Windows desktop or your *My Documents* folder.

Installing FileZilla for Windows

Note: An online installation guide for FileZilla can be found at https://wiki.filezilla-project.org/Client_Installation.

1. Open the installation program by double clicking on its icon.
 - Note: Your computer might display a security warning prior to installation. Click **Run** to start the installation.

Customer Care Message

2. When the Installation window appears, click the **Next** button.
 - **Note:** The installer will prompt you to install one or more optional software(s). Click the **Decline** button if you do not want to install the optional software.
3. The FileZilla setup software will begin downloading.
4. Decide if you wish to install only for your user account or if FileZilla should be accessible by every user on the machine, then click **Next**.
5. You will be prompted to select the components that you wish to install.
6. The next window will ask you where to install the program. If you don't have any special requirements, click **Next** to continue.
7. You will be asked to name the installation folder for FileZilla shortcuts. The default name "FileZilla FTP Client" should be acceptable for most users. You may also choose not to install these shortcuts.
8. Click **Install**.
9. Click **Finish** to close Setup.

FileZilla for Windows Quick Start

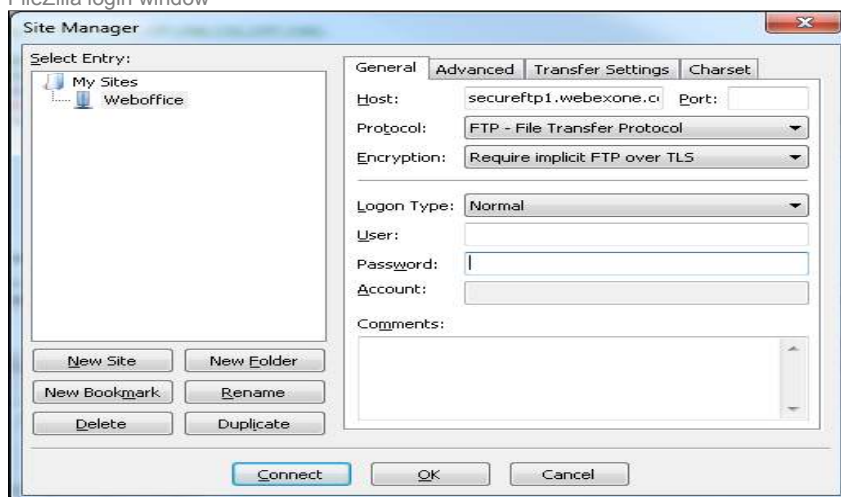
1. Double-click the **FileZilla** icon on your computer's desktop to launch the WinSCP client or launch it from the Start menu by clicking **Start > All Programs > FileZilla FTP Client > FileZilla**.
2. Click on the Site Manager Icon or click on the **Site Manager** option under the **File** menu.
3. Click on the **New Site** button to create a new site profile. Choose a name for the new site. It is just a profile name. It does not have to match the server name or the directory name.
4. Select the **General** Tab and enter the following settings:

- Host: secureftp1.webexone.com
- Port: 990
- Protocol: FTP - File Transfer Protocol
- Encryption: Require implicit FTP over TLS
- Login Type: Normal
- User: (refer to the Database or Documents backup page to obtain your username. See the example admin username below.)

FTPS Backup Site:	secureftp1.webexone.com
FTPS Admin Login:	yoursite.webexone.com\YourUsername\admin
FTPS Password:	Your password is the same as your current WebOffice or Workspace account site

- Password: WebOffice/Workspace account password
- Account: leave it blank (default value)

FileZilla login window



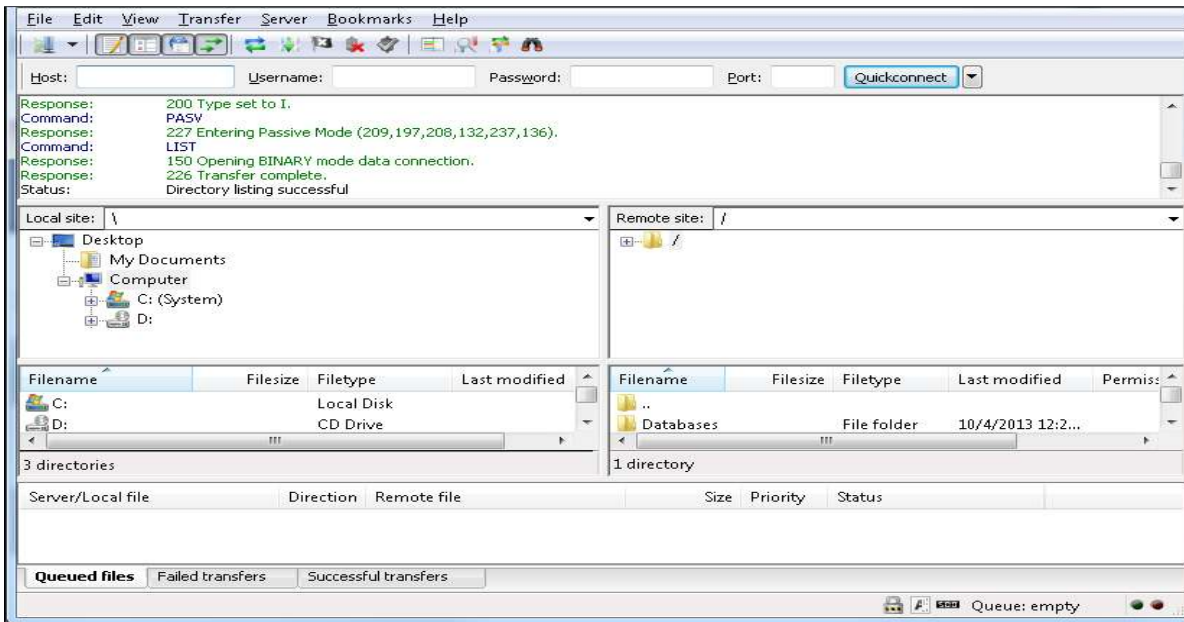
5. Click **Connect**.
6. When the Unknown certificate prompt appears, check the **Always trust certificate in future sessions** box, then click **OK**.

To reconnect to the FTPS server at a later time, open FileZilla, click **File > Site Manager...**, select the entry created for your site, then click the **Connect** button.

Transferring Files with FileZilla for Windows

Customer Care Message

After logging in, the data structure of your remote server account will be displayed in the right window. Your local files will appear in the left window. On the left-side of the window, browse to the folder you would like to save the files to, then drag and drop files from the remote server to your local file system.



Mac

Downloading FileZilla for Mac

To download the FileZilla client, navigate to <https://filezilla-project.org/> and select the "Download FileZilla Client" button. Click the **Download Now** button to start downloading the installation file.

Installing FileZilla for Mac

- Go to your Downloads folder and double-click the downloaded file. The software will be automatically installed to your desktop.

FileZilla for Mac Quick Start

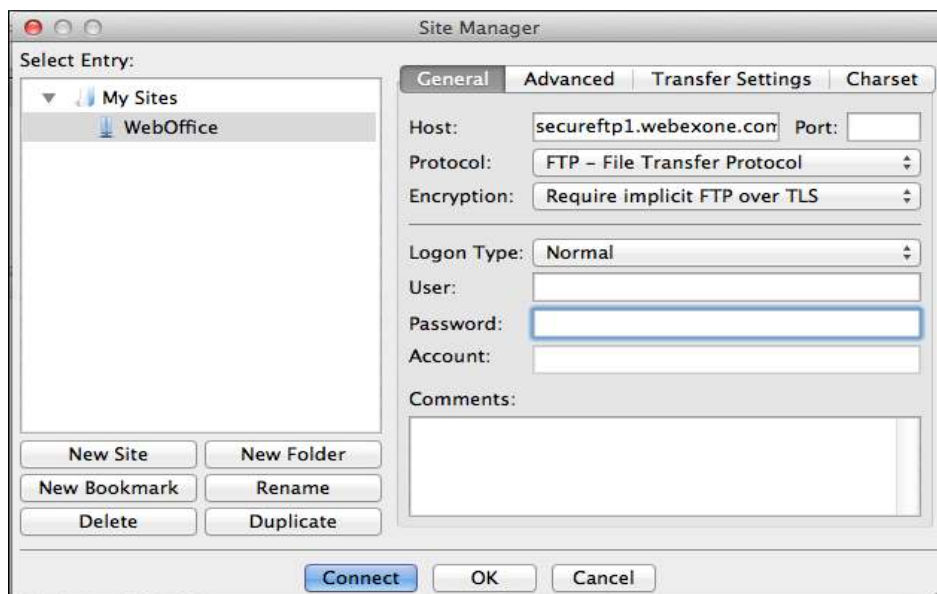
1. Double-click the **FileZilla** icon on your desktop.
2. If prompted, click the **Open** button.
3. Go to the **File** menu, then select **Site Manager...**
4. Click the **New Site** button.
5. Enter a name for the connection. The default name is New site.
6. In the general tab, specify the following information:
 - Host: secureftp1.webexone.com
 - Port: 990
 - Protocol: FTP - File Transfer Protocol
 - Encryption: Require implicit FTP over TLS
 - Login Type: Normal
 - User: (Refer to the Database or Documents backup page to obtain your username. See the example admin username below.)

FTPS Backup Site:	secureftp1.webexone.com
FTPS Admin Login:	yoursite.webexone.com\YourUsername\admin
FTPS Password:	Your password is the same as your current WebOffice or Workspace account site

- Password: WebOffice/Workspace account password
- Account: leave it blank (default value)

FileZilla login window

Customer Care Message

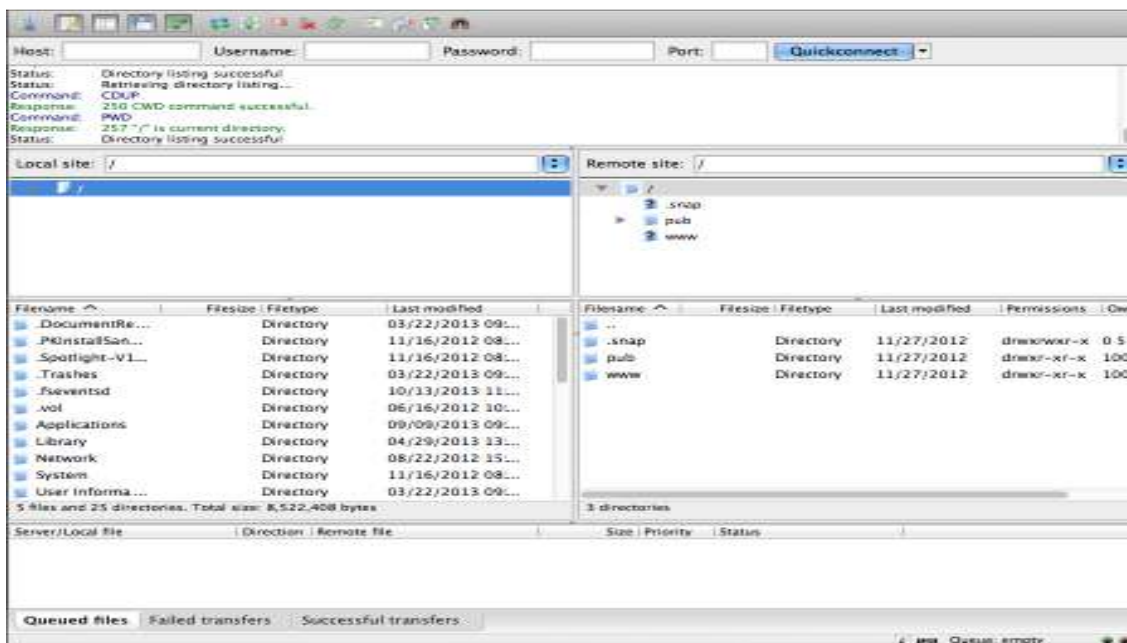


7. Click the **OK** button.
8. Go to the **File** menu, then Select **Site Manager....**
9. Select the connection you just created, then click the **Connect** button.
10. When the Unknown certificate prompt appears, check the **Always trust certificate in future sessions** box, then click **OK**.

To reconnect to the FTPS server at a later time, click the FileZilla icon on your desktop, navigate to **File > Site Manager....**, select the entry created for your site, then click the **Connect** button.

Transferring Files with FileZilla for Mac

After logging in, the data structure of your remote server account will be displayed in the right window. Your local files will appear in the left window. On the left-side of the window, browse to the folder you would like to save the files to, then drag and drop files from the remote server to your local file system.



Customer Care Message

Frequently Asked Questions

- [Admin Backup Frequently Asked Questions](#)
- [Member Backup Frequently Asked Questions](#)