



Webex Calling Analytics Initial Setup

May 2022

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Version Control

Document Name:	Webex Calling Analytics Initial Setup
Description:	Licence Activation and Integration with Webex Calling (version 4.0)
Document Owner(s)	Lee Jones
Document Author:	Lee Jones
Creation Date	05-October-2021
Version number	2.0

Change History

Version	Date	Changed by	Main Changes
Version 1.0	05-Oct-2021	Lee Jones	Original Document
Version 2.0	16-May-2022	Leonie Martino	Integrate the Analytics Portal with Webex



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Webex Calling Analytics Initial Setup Guide

This document provides a list of steps needed to set up Webex Calling Analytics. After filling in the initial setup form, access to the Service Provider portal will be granted with login credentials sent via email.

What you need to have ready before you start

1. Choose licences

User licences include:

- The **Essentials licence** which delivers entry-level analytics providing a high-level understanding of how business calls are being managed.
- The **Advanced licence** which delivers advanced analytics providing a comprehensive suite of reports and dashboards.

Additional licences include:

- **Wallboard Projection** which allows Advanced users to share data with anybody in the organisation
- The **CRM Connect licence** which allows integration with a range of CRM systems syncing customer contacts to the customer directory.

Please Note: Billing is triggered by the licences selected in this section.

Watch this video to gain a better understanding of subscription levels and licences.



2. Login Details

- In order to integrate Analytics with Webex you will need the organisation's **Webex for Developers** portal administrator's login details.
- Licence setup and integration with Webex is done through the **Service Provider portal**. This login information will have been sent to the organisation via email.

Activate licences and integrate with Webex Calling

Step 1. Log into the Analytics Service Provider portal

Once you have logged into the Service Provider portal, click on the Customers tile and go to the Add Customer page.



Step 2. Select the Reseller and enter Customer details

Fill in the Reseller field by selecting the organisation's name from the dropdown menu.

Please note: The reseller is simply the organisation that is being set up.

Where details are available, the fields within the Reseller section (First Name, Last Name, Reseller Name, Tech Support Reference) will auto populate once the organisation's name has been entered into the Reseller field.

Complete the Customer Details Section. These details will be used to set up administrator privileges within the analytics portal. Mandatory fields are identified by an asterix.

- **Customer Name*:** Organisation's name
- **Customer Contact:** Primary contact's name
- **Telephone Number:** Primary contact's telephone number
- **Customer Address:** Primary contact's address
- **Customer Post Code:** Primary contact's post code
- **Customer Email ID*:** Primary contact's email address (please note: the Analytics portal login details will be sent to this address)
- **Additional Customer Reference:** Enter an alternative contact email address here
- **Billing ID*:** Free text field for the organisation's billing identification
- **Billing Start Date:** This is auto populated and non-editable
- **Country:** Select the organisations location to determine the **Time Zone**

Step 3: Enter the System Details and CLI/Caller ID Number Masking (optional)

The **Customer Reference** field (Cust Ref*) is auto populated using details from the Customer Name field, however, it can be edited here.

For GDPR compliance, **CLI/Caller ID Number Masking** requirements can be entered here. Users can mask up to six digits on incoming, outgoing and internal calls.

Please note: Settings for CLI/Caller ID Number Masking is optional at this stage. They can be entered in the Configuration section of the Analytics portal at a later time.

Click Next to go to the Webex Integration page.

Step 4. Integrate the Analytics portal with Webex

Where single sign-on (SSO) or two factor authentication (2FA) are enabled, use manual set up to integrate with Webex. Go to Manual Set Up.

Otherwise, auto connect using the process outlined below.

Auto Connect

Use Auto Connect when Single Sign-On (SSO) or Two Factor Authentication (2FA) is **NOT** in use.

To auto connect the Analytics portal with Webex, select the Auto Connect tab.

In the **Email Address** and **Password** fields, enter Webex for Developers administrator's login details. These details allow us to integrate with the Webex Calling platform and begin populating data.

Click Submit.

An information box will appear confirming that the integrational setup has been successful. Analytics login credentials will be sent via email to the address entered under Customer Email ID. Call analytics can be accessed within 24hrs.

Manual Set Up

Use Manual Set Up when Single Sign-On (SSO) or Two Factor Authentication (2FA) is in use.

For manual set up select the Manual Set Up Tab. A redirect URI (Uniform Resource Identifier) is generated which will need to be entered in the Webex for Developers portal. Click on the copy icon to the right of the Redirect URI field to copy the Redirect URI.

- Click on the Create button to navigate to the Webex for Developers portal
- Log in to open the new integration form

Within the New Integration form fill in the following fields:

- **Integration Name:** Enter a name as it will appear in Webex (for example “Analytics Integration”)
- **Icon:** Choose an icon
- **Description:** Enter a description (for example, “Analytics Integration”)
- **Redirect URIs:** Paste your Redirect URI that you copied from the Service Provider portal
- **Scopes:** Selected the following scopes to enable communication between the Apps
 - spark-admin: xsi
 - spark-admin: people_read
 - spark: organizations_read

Please note: If these three scopes are not present, please contact the Webex Support Team.

Click the Add Integration button. The Webex for Developers portal will return a screen confirming that your integration has been created.

Copy the three fields below from this page in the Webex for Developers portal and paste them into the Webex Integration page of the Service Provider Portal.

- **Client ID**
- **Client Secret**
- **OAuth Authorization URL**

Click the Authorise button on the Service Provider Webex Integration page. To authorise the integration, log into the Webex for Developers portal using the administrator's username and password.

A screen will be displayed asking you to accept the integration. Click Accept.

Return to the Service Provider Webex Integration page and click Submit.

An information box will appear confirming that the integrational setup has been successful. Analytics login credentials will be sent via email to the address entered under Customer Email ID. Call analytics can be accessed within 24hrs.

Step 5. Assign Logins

When the administrator first logs into the Analytics portal, they will enter the Admin console. The User Management page can be used to create Essentials and Advanced logins to the portal. These users will then be able to log in and begin using the reporting features.

