WebEx is Cisco’s online meeting and collaboration hub. Esna’s iLink for WebEx provides an extension for the Google Chrome web browser, and an add-on for Microsoft Internet Explorer. This guide provides assistance with the installation, configuration and use of iLink for WebEx.
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INTRODUCTION

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APPENDIX A: REVISION HISTORY
WebEx is Cisco’s online meeting and collaboration hub. Through WebEx, enterprise users can setup events that any contact with access to the Internet can attend. Use WebEx to host online events and webinars, offer training and eLearning programs, or to provide live technical support.

Esna iLink for WebEx supplements the Chrome and Internet Explorer web browsers. Events can be created instantly through a contact’s details. Schedule an event through a calendar and invite multiple attendees. Protect the event with a Password to limit attendance to authorized contacts, or leave it open for all to participate.

**Warning:** Integration with Google Apps and Gmail requires a WebEx Enterprise (corporate) account. A WebEx Premium with URL (personal) account does not support this integration.

**Note:** This document covers the steps necessary to install and access Cisco’s WebEx meeting and collaboration hub through iLink for WebEx. It is not intended to be a WebEx user manual. For details and training on using WebEx, refer to [www.webex.com](http://www.webex.com).
Configuring the WebEx Server

The administrator must configure the WebEx server before end-users can install iLink for WebEx on their systems.

1. Log in to the WebEx corporate account with administrator credentials.
2. Under Site Administrator > Manage Site, go to Site Settings.
3. Enable the iCalendar option.
Installing the WebEx Extension

The installation procedure is specific to the web browser: Google Chrome, or Microsoft Internet Explorer.

**Note:** Before WebEx can be used, a subscription must be paid for and an Enterprise account setup with Cisco for the use of the service. Contact Cisco Systems for details and pricing information.

### Google Chrome

The WebEx Chrome Extension can be installed from the Chrome Web Store. Additional licensing is required for this product. Please contact your sales representative for more details.

1. Open the Chrome web browser and go to the Chrome Web Store at https://chrome.google.com/webstore.
2. In the search bar, type Esna and hit enter.

3. Select the **Extensions** radio button.
4. Click [+ FREE] beside **Esna iLink for WebEx** to launch the installer.

5. When prompted, click **Add** to confirm the installation of the extension.
6. The Extension will be added to the Chrome browser. When finished, the browser will display ![RATE IT](https://chrome.google.com/webstore/rating?hl=en&url=https://chrome.google.com/webstore/detail/esna-ilink-esna-lk/jpmpbmdnnpblfhkajfhfjgfdfhjg) and the iLink icon ![iLink icon](https://chrome.google.com/webstore/detail/esna-ilink-esna-lk/jpmpbmdnnpblfhkajfhfjgfdfhjg) will appear to the right of the address bar. The program will launch automatically.

7. At the WebEx Options page, choose the set of credentials that will be used to login. Select one of these 4 options.

   - **Google services**: Select this option to login using the credentials of your Google account. Select the account, then enter your username and password details in the space provided.

   ![Google services login](https://chrome.google.com/webstore/detail/esna-ilink-esna-lk/jpmpbmdnnpblfhkajfhfjgfdfhjg)

   - **Salesforce services**: Select this option to login using your Salesforce credentials.

   ![Salesforce services login](https://chrome.google.com/webstore/detail/esna-ilink-esna-lk/jpmpbmdnnpblfhkajfhfjgfdfhjg)
Enter your Salesforce credentials in the space provided.

- **Office 365 services**: This option is used when you are integrating with Office 365. Select this option, then sign-in with your Office 365 credentials.

- **Esna services**: Login using an account created through Esna’s authentication server (www.onesna.com).
8. When prompted, select **Accept** to give the extension the necessary permissions.

![Permission Prompt](image)

**Note:** This step is only required the first time the extension is run. Chrome will use the same credentials each time the browser is started thereafter.

**Hint:** iLink for WebEx supports **Single Sign-On (SSO)**. Once WebEx and the corporate authentication provider have been properly configured by the administrator, the same user and password details entered into the browser will be used to provide secure access to WebEx.

**Note:** A successful login requires a server URL. This information should be filled in automatically using Esna’s **Cloud Licensing Engine**. When the program is licensed, the necessary entries will be made for the program to access through the Internet.

9. Click the WebEx icon 🌐 to create an instant meeting.
iLink for WebEx can be installed as an add-on to Internet Explorer. This requires the Esna iLink Add-Ons for Internet Explorer application from Esna's web site. Additional licensing is required for this product. Please contact your sales representative for more details.

**Note:** Internet Explorer 11 or later is required to use iLink for WebEx.

1. Open Internet Explorer and go to [https://manage1.esna.com/iChrome/iChrome.application](https://manage1.esna.com/iChrome/iChrome.application).
2. The product installer will launch. When prompted, click **Install**.

3. The browser will be configured with the necessary files.

4. Internet Explorer must be restarted for the Add-on to be made available. When prompted, click **Yes** to relaunch IE.
5. The Extensions window appears allowing you to select which Esna product to attach to IE. Click Esna iLink for WebEx.

6. The selected add-on will be attached to Internet Explorer.

7. At the WebEx Options page, choose the set of credentials that will be used to login. Select one of these 4 options.

- **Google services**: Select this option to login using the credentials of your Google account.
Select the account, then enter your username and password details in the space provided.

- **Salesforce services**: Select this option to login using your Salesforce credentials. Enter your Salesforce credentials in the space provided.

- **Office 365 services**: This option is used when you are integrating with Office 365. Select this option, then sign-in with your Office 365 credentials.
- **Esna services**: Login using an account created through Esna’s authentication server ([www.onesna.com](http://www.onesna.com)).

8. When prompted, click **Accept** to confirm the installation of the add-on.

9. Esna iLink for WebEx must login to both the WebEx server and the Gmail account if it is to connect them. Therefore, depending upon the configuration of your system, you may also be asked to provide additional credentials to login to the **Google Gmail servers**.

Note: This step is only required the first time the extension is run. The same credentials will be used each time the browser is started thereafter.

**Hint**: iLink for WebEx supports **Single Sign-On** (SSO). Once WebEx and the corporate authentication provider have been properly configured by the administrator, the same user and password details entered into the browser will be used to provide secure access to WebEx.

**Note**: A successful login requires a server URL. This information should be filled in automatically using Esna’s **Cloud Licensing Engine**. When the program is licensed, the necessary entries will be made for the program to access through the Internet.

10. The Esna toolbar will appear beneath the browser’s address bar. Click the Esna iLink for WebEx icon (🔗) to create an instant meeting.
Turning Off the Esna Add-ons Toolbar

Use the following procedure to turn off the toolbar in Internet Explorer.

1. Click the IE Settings icon and choose **Manage Add-ons**.

2. Disable **Esna iLink Add-Ons for Internet Explorer**, then click **Close**.

To return the toolbar to IE, re-enable the add-on.

Uninstalling Esna iLink Add-Ons for Internet Explorer

The program cannot be removed using IE’s Add-ons Manager. Remove the program using Windows’ Control Panel.

1. Open **Windows Control Panel** and select **Programs and Features**.
2. Uninstall **Esna iLink Add-Ons for Internet Explorer**.
Changing Login Credentials

1. To change login credentials, right-click the iLink for WebEx icon and choose Options.

2. Click Logout to leave the program if necessary.

3. Right-click the iLW icon and choose Options. Select the appropriate login credentials.

4. Proceed with the login procedure as outlined above.
USING THE
ILINK FOR WEBEX ICON

Browser Icon - Instant Meeting

Installing iLink for WebEx extension adds an icon to the web browser. Click the icon to create an instant meeting. Participants can be added once the meeting has started and the WebEx manager window has opened.

1. Left-click the WebEx icon to launch the Instant Meeting wizard.
2. In the Instant Meeting window, specify the options for the meeting.

**Note:** Some options will not appear unless the corresponding software has been licensed and installed.

**Apply template:** Templates can be created to automatically fill-in these fields. If you have a recurring meeting with a common format, create and apply a template to the meeting to use the same settings each time. See Meeting Templates on page 26.

**Topic:** Enter the topic of the meeting.

**Meeting type:** Leave at Default unless you have the corresponding Cisco platform installed at your site. Different meeting types can provide different connection options and features. Contact your administrator for more information on what meeting types are available and how to use them.

**Duration:** Enter the expected length (in hours and minutes) of the meeting.
**Audio Conference**: If an audio component is required for this meeting, select the desired connection method from the dropdown list.

- **WebEx Audio**: This option is only available if your account includes audio as an option. Enable the checkbox if your account has a Toll-Free number associated with it. From the popup list, select the desired tone or name to be played, if any, when a contact joins or leaves a meeting. The number to dial will be included in the invitation. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

- **Other teleconference**: If you have a teleconferencing service setup, enter instructions for users to connect to the service. Include the telephone number and any access codes or PIN numbers here. Once the meeting has started, clicking the **Audio Conference** icon will display these instructions. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

- **VoIP**: Select VoIP to enable embedded voice conferencing in the meeting. All participants will have the option to add audio to the meeting through their Internet connection (using microphone and speakers on the computer or device). Click **Voice Conference** in the main Meeting window to start this feature.

- **TSP/MeetingPlace**: If these audio providers are configured on your system, they will be included in the list of available conferencing options when creating a meeting.

- **Global call-in**: iLink for WebEx supports the Global Call-in numbers feature of WebEx. Once configured through WebEx, those numbers will appear on the Audio Conference menu.

- **Password**: Click **Generate** to create a random 4 digit combination to access the meeting. This is optional and is only required if the meeting is to be private.

- **Agenda**: Any meetings scheduled for today will appear at the bottom of the Instant Meeting screen. If you created the meeting, click **Start** to begin the meeting. If you were invited to a meeting, click **Join** to connect to a meeting already in-progress. For non-WebEx events, click **Add** to make it into a WebEx meeting. To view the meeting details, click on the meeting name.

  Click **Create meeting now** to start the meeting.

  **Note**: Click **My WebEx** to open the Cisco WebEx web page. Login to review your calendar, get support, and to create and manage meetings.

3. WebEx will launch in the browser window, creating a new meeting with you as the host. The **WebEx Meeting Center** provides full control over the meeting.
4. To add participants, click **Invite & Remind**. Under **Invitees**, enter the email addresses for all meeting participants. Separate each address with a comma or semicolon. Click **Send** when finished. An invitation email will be sent to all invitees with the meeting details. 

5. When a contact clicks on the link in their invitation email, they will join the meeting through their browser or mobile device, and they will appear in the meeting management window (WebEx Meeting Center).

6. When the meeting is over, click **End Meeting** to dismiss all attendees and close the Meeting Center window.

**Hint:** Additional contacts can be invited at any time using the **Invite & Remind** button.
Meeting Templates

Meeting Templates can be created to automate setting up recurring meetings. Create and Apply templates to have each meeting use the same settings every time.

Creating a Template

To create a template:
1. Right-click the WebEx icon.
2. Select Options from the pop-up menu.
3. In the Templates section of the options window, specify the details for the meeting template as you would for any event. Name the template so that it can be called up when needed. Click Save when finished.

Note: Default is the standard meeting type. Choosing either Pro 1000, Support 1000 or Personal meeting room requires additional licensing from Cisco. Selecting one of these will bring up additional options to configure.

Note: If a Password is specified for the template, it will be the same password each time the meeting is started. If necessary, this can be changed by the host while the meeting is being setup.
Using a Template

Once at least one template has been created, the **Apply template** menu will appear in the meeting setup screen. This allows the host to choose an existing template to Apply to the meeting.

**Note:** If no templates have been created, the **Apply template** menu will not be displayed in the window.

When creating the meeting, select a template to apply those predefined settings to the meeting. All of the settings can still be modified by the host at this time as required.

When ready, click **Create meeting now**. The meeting will be created with the defined settings.
Cisco WebEx Meeting Center

The WebEx Meeting Center is the control hub for each event. The Host of the event can share their desktop or applications, or pass control to others for them to share. The Host can invite more attendees, or dismiss current participants from the meeting. All meeting functions are controlled from here.

**Invite & Remind**: Use this icon to invite new contacts to join the meeting, or for a meeting scheduled and save through the Google Calendar, to send a reminder email to those who were invited that the meeting has begun. This option is also available through the **Participant** menu.

**Connect to Audio**: When Audio Conferencing during the setup of the meeting, this icon will become active. Click to access the audio method selected. All participants have the option to enable their own voice conference once the Host has started. For VoIP, clicking here will start the embedded audio. If Other Teleconference was chosen, clicking here will display the instructions entered regarding what number to call, and any access codes or PIN numbers required.

**Record**: Meetings can be recorded, both the voice component and the computer screen. The recording can be saved to either the computer, or stored on the WebEx server. Before using this option, consult the WebEx documentation to ensure that the recorder is properly setup. Recording will not commence until there is at least one other person beside the host in the meeting. When ready to record, a recording control will appear on the screen. Click the red Record button to start recording.

**Share Desktop**: Click this button to share your desktop, or just specific running programs from it. All meeting participants will see the shared content. To pass presenter abilities to another attendee, select their name in the **Participants** window and click **Make Presenter**.

**End Meeting**: This item will end recording and dismiss all participants from the meeting.

**Hint**: For a complete description of all features of WebEx, please refer to Cisco’s program documentation.
Esna’s Cloud Licensing Engine

The Cloud Licensing Engine (CLE) allows administrators to monitor and adjust the usage of their iLink for WebEx licenses. Users can be added or removed from the license. Warnings will appear when the license has expired, and links are provided to renew the license when appropriate.

1. To access the CLE, open a web browser and enter the address: https://manage1.esna.com/ucwcl/login.aspx.
2. If you are not currently logged in to an account, you will be prompted to login now. Choose the appropriate method of authentication.

- **Google credentials**: Enter the Google account details (email and password) of the user with the license manager authorization. This will be the account setup with Esna when the service was originally created. Additional administrator accounts can be added by this user as required.

- **Salesforce credentials**: Select this option to login using your Salesforce credentials. Enter your Salesforce credentials in the space provided.
• **OnEsna credentials**: Login using an account created through Esna’s authentication server ([www.onesna.com](http://www.onesna.com)).

3. When prompted, click **Accept** to continue.

4. The list of available client programs appears. To manage your iLink for WebEx accounts, click that link.

5. The **WEBEX: License manager** page appears listing each of your corporate accounts. Click on the site you wish to manage. Click **Logout** to leave the License manager.

---

**Site**: The name of the site is shown here. Click a site to open its details.

**Amount**: The number of licenses purchased for the site.

**In Use**: This shows the number of licenses that have been taken by users.

**Expiry**: The date on which the current license is set to expire.
6. All of the site users who have currently acquired a license are shown. Details of that license are also included.

**Note:** This list is populated by the system automatically based upon client usage to date.

Click the **License manager** link to return to the **Accounts** window.

![License manager](image)

**Account**: Displays the email address of each user who have obtained a license.

**Created**: Shows the date when the license was acquired.

**Licensed**: Displays whether a user's license is active (**True** or **False**).

**Disabled**: If the administrator has turned off the license for a user, it is displayed here.

**Evaluation**: If no licenses are available, then a user will be given a temporary, Evaluation license.

**Actions**: The administrator can disable or enable any account from this column. Disabling a user will free that license for others to use.

**Export**: Use this button to create a comma delimited (CSV) file containing the user details.

![Export](image)

A CSV file can be opened and modified using any text editor (e.g. Windows Notepad, Microsoft Excel, MS Word).
**Managers**: Click this button to access the list of account managers. These are the users who have administrative control over each site.

Add a new Manager by clicking on the **Create** button, then enter the user details. Click **Save** when finished to add the new manager to the list.
License Renewal

When the WebEx license has expired, users will be sent to a site where they can renew the license for another period.

1. Choose either Single User or Multiple User Purchase.
2. For a **Single User** renewal, enter the email address of the account. Click **Check Availability** to ensure that the address can be used. **OK** will appear when the address has been confirmed. If an address is already on file, then that address cannot be used. You will need to login to your account to modify the license on an existing address.

![Image of email address input](image)

For a **Multiple User** renewal, enter the corporate domain name you want to use. Click **Check Availability** to ensure that the domain can be used. **OK** will appear when the domain has been confirmed. If a domain is already on file, then that domain cannot be used. You will need to login to your account to modify the license on an existing domain.

![Image of domain name input](image)

3. Under **Purchase Details**, select the duration for the license renewal. Click **Proceed to Checkout** to complete the purchase.

![Image of purchase details](image)
Once the WebEx Extension has been installed into the web browser, events can be created or scheduled in 3 ways:

- Through the **Gmail Contact Card**.
- From the **Gmail People Widget**.
- Using the **Google Calendar**.

The first two applications create an instant meeting, begun immediately. The last one requires the meeting organizer to create the meeting at the appropriate time.

### Gmail Contact Card

A Contact Card is available within Google's GMail application.

1. Open an email and locate the sender's contact details in the upper left corner of the message.

2. Hover the mouse over the sender to open the Contact Card.

3. In the bottom right-hand corner of the Card is the WebEx icon 🔄. Click it to start an instant meeting with this contact.
4. From the Instant Meeting window, specify the options for the meeting.

**Attendee(s):** The email address of the selected contacts will be filled in for you. This is the address that the meeting invitation will be sent to.

**Apply template:** Templates can be created to automatically fill-in of these fields. If you have a recurring meeting with a common format, create and apply a template to the meeting to use the same settings each time. See **Meeting Templates** on page 26.

**Topic:** Enter the topic of the meeting.

**Meeting type:** Leave at **Default** unless you have the corresponding Cisco platform installed at your site. Different meeting types can provide different connection options and features. Contact your administrator for more information on what meeting types are available and how to use them.

**Duration:** Enter the expected length (in hours and minutes) of the meeting.

**Audio conference:** If an audio component is required for this meeting, select the desired connection method from the dropdown list.

- **WebEx Audio** - This option is only available if you account includes audio as an option. Enable the checkbox if your account has a Toll-Free number associated with it. From the popup list, select the desired tone or name to be played, if any, when a contact joins or leaves a meeting. The number to dial will be included in the invitation. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

- **Other teleconference** - If you have a teleconferencing service setup, enter instructions for users to connect to the service. Include the telephone number and any access codes or PIN numbers here. Once the meeting has started, clicking the Audio Conference icon will display these instructions. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

- **VoIP** - Select VoIP to enable embedded voice conferencing in the meeting. All participants will have the option to voice audio to the meeting through their Internet connection (using microphone and speakers on the computer or device). Click Voice Conference in the main Meeting window to start this feature.

- **TSP/MeetingPlace:** If these audio providers are configured on your system, they will be included in the list of available conferencing options when creating a meeting.

- **Global call-in:** iLink for WebEx supports the Global Call-in numbers feature of WebEx. Once configured through WebEx, those numbers will appear on the Audio Conference menu.

**Password:** Click **Generate** to create a random 4 digit combination to access the meeting. This is optional and is only required if the meeting is to be private.

Select **Close and add another attendee** to close the instant meeting window. Open the contact cards for additional people and click on the WebEx icon to add them to the meeting.

Click **Create meeting now** to start the meeting once all contacts have been added. Additional contacts can be added after the meeting has started.

**Note:** Click **My WebEx** to open the program web page. Login to review your calendar, get support, and to create and manage meetings.
5. **WebEx will launch in the browser window, creating a new meeting with you as the host.** The **WebEx Meeting Center** window provides full control over the meeting.

6. **An invitation will be automatically sent to all selected contacts.**

   Once a contact has received the invitation, they must click on the link in the email to join the meeting. Any additional information, such as telephone numbers to dial for audio content, or passwords for accessing the event, will also be included with the invitation, but clicking on the link will automatically connect the user to the meeting with the necessary credentials.

   ![Join WebEx meeting in progress: This week in sales.](image)

   The contact has joined the meeting.
Gmail People Widget

The Google People widget is available within Google's GMail application.

1. Open an email and locate the sender's contact details in the People Widget to the right side of the message.

2. In the bottom of the widget is the WebEx icon. Click it to start an instant meeting with this contact.

3. From the Instant Meeting window, specify the options for the meeting.

**Attendee(s):** The email address of the selected contact will be filled in for you. This is the address that the meeting invitation will be sent to.

**Apply template:** Templates can be created to automatically fill-in these fields. If you have a recurring meeting with a common format, create and apply a template to the meeting to use the same settings each time. See Meeting Templates on page 26.

**Topic:** Enter the topic of the meeting.

**Meeting type:** Leave at Default unless you have the corresponding Cisco platform installed at your site. Different meeting types can provide different connection options and features. Contact your administrator for more information on what meeting types are available and how to use them.

**Duration:** Enter the expected length (in hours and minutes) for the meeting.

**Audio conference:** If an audio component is required for this meeting, select the desired connection method from the dropdown list.

- **WebEx Audio** - This option is only available if your account includes audio as an option. Enable the checkbox if your account has a Toll-Free number associated with it. From the popup list, select the desired tone or name to be played, if any, when a contact joins or leaves a meeting. The number to dial will be included in the invitation. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

- **Other teleconference** - If you have a teleconferencing service setup, enter instructions for users to connect to the service. Include the telephone number and any access codes or PIN numbers here. Once the meeting has started, clicking the Audio Conference icon will display these instructions. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).
VoIP - Select VoIP to enable embedded voice conferencing in the meeting. All participants will have the option to use audio to the meeting through their Internet connection (using microphone and speakers on the computer or device). Click Voice Conference in the main Meeting window to start this feature.

TSP/MeetingPlace: If these audio providers are configured on your system, they will be included in the list of available conferencing options when creating a meeting.

Global call-in: iLink for WebEx supports the Global Call-in numbers feature of WebEx. Once configured through WebEx, those numbers will appear on the Audio Conference menu.

Password: Click Generate to create a random 4 digit combination to access the meeting. This is optional and is only required if the meeting is to be private.

Select Close and add another attendee to close the instant meeting window. Open the contact cards for additional people and click on the WebEx icon to add them to the meeting.

Click Create meeting now to start the meeting once all contacts have been added. Additional contacts can be added after the meeting has started.

**Note:** Click My WebEx to open the program web page. Login to review your calendar, get support, and to create and manage meetings.

4. WebEx will launch in the browser window, creating a new meeting with you as the host. The WebEx Meeting Center window open, providing full control over the meeting.
5. An invitation will be automatically sent to the contact.

Once a contact has received the invitation, they must click on the link in the email to join the meeting. Any additional information, such as telephone numbers to dial for audio content, or passwords numbers for accessing the event, will also be included with the invitation, but clicking on the link will automatically connect the user to the meeting with the necessary credentials.

The contact has joined the meeting.

**Hint:** The Meeting number is used to join the meeting through the WebEx meeting web site.
Meetings where any number of contacts can attend can be scheduled through the Google Calendar. These meetings can occur at a future date and time, with recipients receiving reminder notices shortly beforehand.

**Note:** The Google and WebEx calendars are synchronized. If a meeting is added, deleted, or moved in the Google Calendar, either by drag-and-drop or from within the meeting details, the changes will also be made to the WebEx calendar. Changes to the WebEx calendar will **not** be reflected in Google.

1. Open the Google Calendar. Locate and click on the time period for the meeting. Click **Edit event**.

2. Give the meeting a name, and set all other scheduling and descriptive options accordingly. Under **Add: Guests**, enter the email address of a contact who should attend the meeting, then click **Add**. Repeat until all contacts have been added to the list.
3. Under WebEx, click Schedule meeting to open the WebEx Booking window.

Apply template: Templates can be created to automatically fill-in of these fields. If you have a recurring meeting with a common format, create and apply a template to the meeting to use the same settings each time. See Meeting Templates on page 26.

Alternate hosts: Enter the email address(es) of any invitees, beside yourself, that will be able to start the meeting at the chosen time. Separate each address with a semicolon. Alternate hosts must already be present in the WebEx database. Only one person can be the host of a meeting at one time.

Meeting type: Leave at Default unless you have the corresponding Cisco platform installed at your site. Different meeting types can provide different connection options and features. Contact your administrator for more information on what meeting types are available and how to use them.

Audio conference: If an audio component is required for this meeting, select the desired connection method from the dropdown list.

WebEx Audio - This option is only available if you account includes audio as an option. Enable the checkbox if your account has a Toll-Free number associated with it. From the popup list, select the desired tone or name to be played, if any, when a contact joins or leaves a meeting. The number to dial will be included in the invitation. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

Other teleconference - If you have a teleconferencing service setup, enter instructions for users to connect to the service. Include the telephone number and any access codes or PIN numbers here. Once the meeting has started, clicking the Audio Conference icon will display these instructions. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

VoIP - Select VoIP to enable embedded voice conferencing in the meeting. All participants will have the option to voice audio to the meeting through their Internet connection (using microphone and speakers on the computer or device). Click Voice Conference in the main Meeting window to start this feature.

TSP/MeetingPlace: If these audio providers are configured on your system, they will be included in the list of available conferencing options when creating a meeting.

Global call-in: iLink for WebEx supports the Global Call-in numbers feature of WebEx. Once configured through WebEx, those numbers will appear on the Audio Conference menu.

Password: Click Generate to create a random 4 digit combination to access the meeting. This is optional and is only required if the meeting is to be private.

Click when finished to add the event to the Google calendar.

Whenever a meeting is configured to include a WebEx component, the button will appear beside WebEx option in the scheduling window. Clicking this button will immediately launch the WebEx meeting center in a browser, and open the assigned meeting room. Invitees can click the link in their emails to join the event.
4. When all of the meeting parameters have been configured, click **Save**. You may be prompted to confirm sending the invitation to contacts who are outside of your company. Click **Yes** to proceed.

Confirm the sending of the invitations to all contacts when asked.

An invitation email will be sent to all selected attendees. Each contact will also receive a reminder email shortly before the meeting is scheduled to start. Both emails contain a link to join the meeting room through a web browser, any voice connection information (e.g. teleconference numbers, access codes), and the password if assigned.
Calendar Considerations

- iLink for WebEx will only synchronize data between the Google and WebEx calendars. Other calendar types and programs are not supported.

- Integration between the Google Calendar and WebEx will only occur with the primary account (user) calendar. Additional or custom calendars in Google will not provide the option to create a WebEx event.

Note: Integration with Google Apps and Gmail requires a WebEx Enterprise (corporate) account. A WebEx Premium with URL (personal) account does not support this integration.
Using WebEx with Salesforce

iLink for WebEx extends its reach into Salesforce. The WebEx icon remains beside the address bar, but additional meeting features become available from within Salesforce.

Any links to a contact, whether it is a person's name, email address, or case number, will have a WebEx icon added beside them on the page, provided there is an email address associated with that entry.
Login with Salesforce Credentials

To extend the WebEx functions into Salesforce, the user must login to iLink for WebEx using Salesforce credentials. Logging in using Google credentials will launch iLink for WebEx, but the Salesforce component will not be active.

1. To determine the credentials a user is logged in with, right-click the iLink for WebEx icon.

   Select **Options** from the dropdown menu.

2. a) If the user is logged in **Using Salesforce services**, no further changes are required. Go to step 3.

   ![Using Salesforce services](image)

   b) If the user is logged in using any other authentication method, click **Logout**, and proceed with step 2c.

   ![Logout](image)

   c) If the user is **not logged in**, open the popup menu and choose **Salesforce services**. Click **Login**.

   ![Login](image)

Enter your Salesforce credentials at the prompt to login to iLink for WebEx. If prompted, click **Allow** to grant the program the necessary permissions.
3. Launch Salesforce and login normally.

Creating a WebEx Meeting

**Hint:** For a complete description of the WebEx options and meeting interface, refer to Browser Icon - Instant Meeting on page 23.

To create a WebEx meeting from Salesforce, use the following procedure:

1. To launch an instant WebEx meeting, click the WebEx icon beside a contact's name, email address, or an event associated with them.
2. Enter the details for the meeting, such as the Topic and the expected duration. Click **Create meeting now** to start the meeting in the WebEx environment.
3. The meeting will be created in WebEx.

![WebEx Meeting Center](image)

4. The contact will receive an email with an invitation to the meeting. Within the email will be a link which, when clicked, will cause the contact join the meeting already in progress.

![Email Invitation](image)
Salesforce Actions

When the meeting is created, an **Open Activity** is created and associated with the chosen contact. The activity remains open until the meeting has ended, when the record is moved into the **Activity History** for the contact.

**Note:** There will be a delay of up to 5 minutes before the Open Activity is moved into Activity History.

**Caution:** While WebEx can add more attendees to the meeting once it has started, their details will not be added to any records in Salesforce even if they have a valid entry in the database.

**Warning:** If a meeting is created and then closed in less than 2 minutes, Salesforce may not have had the time to create the Open Activity entry, so no record of the meeting will be made.
Introduction

Once the WebEx Extension has been installed into the web browser, events can be created or scheduled in 3 ways:

- Mail
- People
- Calendar

The Mail and People sections create an instant meeting. Calendar requires the meeting organizer to create the meeting at the appropriate time.

Login with Office 365 Credentials

To extend the WebEx functions into Office 365, the user must login to iLink for WebEx using Office 365 credentials. Logging in using Google credentials will launch iLink for WebEx, but the Office 365 component will not be active.

1. To determine the credentials a user is logged in with, right-click the iLink for WebEx icon.
   Select Options from the dropdown menu.

2. a) If the user is logged in Using Office 365 authentication, no further changes are required. Go to step 3.
   b) If the user is logged in using any other authentication method, click Logout, and proceed with step 2c.
c) If the user is not logged in, open the popup menu and choose **Office 365 services**.

Enter your Office 365 credentials at the prompt to login to iLink for WebEx.

3. Launch Office 365 and login normally.
Mail

The iLink for WebEx Instant Meeting screen can be accessed from the Mail panel of Office 365.

1. Open Office 365 and select Mail from the main menu.

2. Click on an email message, then click the contact's name or picture in the right-hand pane. This opens the person's contact card.

3. Click the WebEx icon to start an instant meeting with this contact.
4. From the Instant Meeting window, specify the options for the meeting.

**Attendee(s):** The email address of the selected contacts will be filled in for you. This is the address that the meeting invitation will be sent to.

**Apply template:** Templates can be created to automatically fill-in these fields. If you have a recurring meeting with a common format, create and apply a template to the meeting to use the same settings each time. See [Meeting Templates](#) on page 26.

**Topic:** Enter the topic of the meeting.

**Meeting type:** Leave at Default unless you have the corresponding Cisco platform installed at your site. Different meeting types can provide different connection options and features. Contact your administrator for more information on what meeting types are available and how to use them.

**Duration:** Enter the expected length (in hours and minutes) of the meeting.

**Audio conference:** If an audio component is required for this meeting, select the desired connection method from the dropdown list.

- **WebEx Audio** - This option is only available if your account includes audio as an option. Enable the checkbox if your account has a Toll-Free number associated with it. From the pop-up list, select the desired tone or name to be played, if any, when a contact joins or leaves a meeting. The number to dial will be included in the invitation. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

- **Other teleconference** - If you have a teleconferencing service setup, enter instructions for users to connect to the service. Include the telephone number and any access codes or PIN numbers here. Once the meeting has started, clicking the Audio Conference icon will display these instructions. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

- **VoIP** - Select VoIP to enable embedded voice conferencing in the meeting. All participants will have the option to use voice audio during the meeting through their Internet connection (using the microphone and speakers on their computer / device). Click Voice Conference in the main Meeting window to start this feature.

- **TSP/MeetingPlace:** If these audio providers are configured on your system, they will be included in the list of available conferencing options when creating a meeting.

- **Global call-in:** iLink for WebEx supports the Global Call-in numbers feature of WebEx. Once configured through WebEx, those numbers will appear on the Audio Conference menu.

**Password:** Click Generate to create a random 4 digit combination to access the meeting. This is optional and is only required if the meeting is to be private.

Select Close and add another attendee to close the instant meeting window. Open the contact cards for additional people and click on the WebEx icon to add them to the meeting.

Click Create meeting now to start the meeting once all contacts have been added. Additional contacts can be added after the meeting has started.

**Note:** Click My WebEx to open the program web page. Login to review your calendar, get support, and to create and manage meetings.
5. WebEx will launch in the browser window, creating a new meeting with you as the host. The **WebEx Meeting Center** window provides full control over the meeting.
6. An invitation will be automatically sent to all selected contacts.

Once a contact has received the invitation, they must click on the link in the email to join the meeting. Any additional information, such as telephone numbers to dial for audio content, or passwords for accessing the event, will also be included with the invitation, but clicking on the link will automatically connect the user to the meeting with the necessary credentials.

The contact has joined the meeting.
People

Use the People page to setup an instant meeting.

1. Open Office 365 and select **People** from the main menu.

![People page in Office 365](image)

2. Select a contact from the list on the left-hand side of the window.

![Selecting a contact in Office 365](image)

3. In the contact details pane, click the WebEx icon 📺 to start an instant meeting.
4. From the Instant Meeting window, specify the options for the meeting.

- **Attendee(s):** The email address of the selected contact will be filled in for you. This is the address that the meeting invitation will be sent to.

- **Apply template:** Templates can be created to automatically fill-in of these fields. If you have a recurring meeting with a common format, create and apply a template to the meeting to use the same settings each time. See [Meeting Templates](#) on page 26.

- **Topic:** Enter the topic of the meeting.

- **Meeting type:** Leave at Default unless you have the corresponding Cisco platform installed at your site. Different meeting types can provide different connection options and features. Contact your administrator for more information on what meeting types are available and how to use them.

- **Duration:** Enter the expected length (in hours and minutes) for the meeting.

- **Audio conference:** If an audio component is required for this meeting, select the desired connection method from the dropdown list.
  - **WebEx Audio** - This option is only available if you account includes audio as an option. Enable the checkbox if your account has a Toll-Free number associated with it. From the popup list, select the desired tone or name to be played, if any, when a contact joins or leaves a meeting. The number to dial will be included in the invitation. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).
  - **Other teleconference** - If you have a teleconferencing service setup, enter instructions for users to connect to the service. Include the telephone number and any access codes or PIN numbers here. Once the meeting has started, clicking the Audio Conference icon will display these instructions. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).
  - **VoIP** - Select VoIP to enable embedded voice conferencing in the meeting. All participants will have the option to use audio to the meeting through their Internet connection (using microphone and speakers on the computer or device). Click Voice Conference in the main Meeting window to start this feature.
  - **TSP/MeetingPlace:** If these audio providers are configured on your system, they will be included in the list of available conferencing options when creating a meeting.
  - **Global call-in:** iLink for WebEx supports the Global Call-in numbers feature of WebEx. Once configured through WebEx, those numbers will appear on the Audio Conference menu.

- **Password:** Click Generate to create a random 4 digit combination to access the meeting. This is optional and is only required if the meeting is to be private.
Select [Close and add another attendee] to close the instant meeting window. Open the contact cards for additional people and click on the WebEx icon [ ] to add them to the meeting.

Click [Create meeting now] to start the meeting once all contacts have been added. Additional contacts can be added after the meeting has started.

**Note:** Click [My WebEx] to open the program web page. Login to review your calendar, get support, and to create and manage meetings.

5. WebEx will launch in the browser window, creating a new meeting with you as the host. The [WebEx Meeting Center] window open, providing full control over the meeting.
6. An invitation will be automatically sent to the contact.

Once a contact has received the invitation, they must click on the link in the email to join the meeting. Any additional information, such as telephone numbers to dial for audio content, or passwords numbers for accessing the event, will also be included with the invitation, but clicking on the link will automatically connect the user to the meeting with the necessary credentials.

The contact has joined the meeting.

**Hint:** The **Meeting number** is used to join the meeting through the WebEx meeting web site.
Calendar

Meetings where any number of contacts can attend can be scheduled through the Office 365 Calendar. These meetings can occur at a future date and time, with recipients receiving reminder notices shortly beforehand.

**Note:** The Office 365 and WebEx calendars are synchronized. If a meeting is added, deleted, or moved in Office 365, either by drag-and-drop or from within the meeting details, the changes will also be made to the WebEx calendar. Changes to the WebEx calendar will not be reflected in Office 365.

1. Open Office 365 and select **Calendar** from the main menu.

2. Locate the time for the meeting to start, then right-click on that space in the calendar. Select **New**.
3. Give the meeting a name, and configure all other scheduling and descriptive options accordingly. Under Attendees, add the email addresses for all contacts who should attend the meeting.

4. Click Create WebEx Meeting to open the WebEx Booking window.

**Apply template**: Templates can be created to automatically fill-in of these fields. If you have a recurring meeting with a common format, create and apply a template to the meeting to use the same settings each time. See Meeting Templates on page 26.

**Alternate hosts**: Enter the email address(es) of any invitees, beside yourself, that will be able to start the meeting at the chosen time. Separate each address with a semicolon. Alternate hosts must already be present in the WebEx database. Only one person can be the host of a meeting at one time.

**Meeting type**: Leave at Default unless you have the corresponding Cisco platform installed at your site. Different meeting types can provide different connection options and features. Contact your administrator for more information on what meeting types are available and how to use them.
Audio conference: If an audio component is required for this meeting, select the desired connection method from the dropdown list.

WebEx Audio - This option is only available if you account includes audio as an option. Enable the checkbox if your account has a Toll-Free number associated with it. From the popup list, select the desired tone or name to be played, if any, when a contact joins or leaves a meeting. The number to dial will be included in the invitation. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

Other teleconference - If you have a teleconferencing service setup, enter instructions for users to connect to the service. Include the telephone number and any access codes or PIN numbers here. Once the meeting has started, clicking the Audio Conference icon will display these instructions. The contact must connect to this service through conventional means (i.e. desktop telephone, cellphone).

VoIP - Select VoIP to enable embedded voice conferencing in the meeting. All participants will have the option to voice audio to the meeting through their Internet connection (using microphone and speakers on the computer or device). Click Voice Conference in the main Meeting window to start this feature.

TSP/MeetingPlace: If these audio providers are configured on your system, they will be included in the list of available conferencing options when creating a meeting.

Global call-in: iLink for WebEx supports the Global Call-in numbers feature of WebEx. Once configured through WebEx, those numbers will appear on the Audio Conference menu.

Password: Click Generate to create a random 4 digit combination to access the meeting. This is optional and is only required if the meeting is to be private.

Click when finished to add the event to the Office 365 calendar.

Whenever a meeting is configured to include a WebEx component, the button will appear beside WebEx option in the scheduling window. Clicking this button will immediately launch the WebEx meeting center in a browser, and open the assigned meeting room. Invitees can click the link in their emails to join the event.

5. When all of the meeting parameters have been configured, click Send. You may be prompted to confirm sending the invitation to contacts who are outside of your company. Click Yes to proceed.

Confirm the sending of the invitations to all contacts when asked.

An invitation email will be sent to all selected attendees. The email contains a link to join the meeting room through a web browser, any voice connection information (e.g. teleconference numbers, access codes), and the password if selected.
# APPENDIX A: REVISION HISTORY

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<thead>
<tr>
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<td>10.7 (3)</td>
<td>• Removed references to Google Hangouts.</td>
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