The Client Applications Guide is designed to educate typical users who will be adapting a single or suite of Officelinx applications. From the desktop client application to mobile apps, the Client Applications Guide thoroughly covers each topic, from installation to how to use it.

Client applications within the Officelinx system are designed with an intuitive user interface which allows the users to learn as they go. The many types of client applications also share a common core, allowing desktop application users to adapt to web or mobile versions without difficulty.

While using these client applications is simple, you may end up missing out on the convenient features and shortcuts which are embedded within all applications to make life easier. In order to familiarize yourself with the platform, and to ensure that your productivity is at its maximum, please take the time to review this guide in detail.
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Table of Contents

19 SSL PROXY INSTALLATION

20 SSL PROXY SETUP
20 Installing Certificates
24 Server Authentication
26 SSL Proxy

29 ILINK PRO DESKTOP

30 INTRODUCTION

30 PRE-REQUISITES
30 Minimum Requirements
30 Installing .Net Framework from Microsoft

31 INSTALLATION

34 LOGGING IN
34 Simplified Interface
34 Authentication
34 Connection Settings
35 Login Failure
35 Credentials Discovery
35 Errors
36 Single Sign-on
36 Google Apps Authentication
36 Office 365 Authentication
37 Windows Authentication
37 UC Authentication
38 Officelinx Configuration

39 MAIN WINDOW

40 PRESENCE MANAGEMENT
40 Locations
40 Schedule
41 Availability
41 Extensions

41 CONTACT MANAGEMENT
41 Recent Activity
41 Contact Display
Interaction Menu
Groups
Add Group
Phone Call
Call and Record
E-Mail
Text Messaging
Chat
WeLink Conference
Remove Member
Notifications
Move to Group
Search Related Documents
Search
Specifying Search Options
Dial-Out Extension

CALL MANAGER
Buttons / Icons
Hold
Transfer
Transfer to...
Mailbox
Phone
Location
Record
Handoff
Transfer to...
Mailbox
Phone
Location
Separate Window

MAIN MENU
Set Current Location
I will be at this location
Chat
Chat Broadcast
Company Directory
History
Call History
Call Information
Event History
Settings
General
Call Manager
Events & Notifications
Sounds
Plug-ins
Help

ILINK PRO DESKTOP PLUG-IN
INTRODUCTION
Settings

PLUG-INS
Bluetooth Configure
Microsoft Outlook Configure
Smart Tags Configure
TAPI

OUTLOOK PLUG-IN
Menu Items
Voice Message Control
Calendar Management
Contact Hover Cards

IP DIALER
Placing a Call Through IP Dialer

ILINK PRO
INTRODUCTION
DOWNLOADING AND INSTALLING
Installing to Google Chrome
Installing to Microsoft Internet Explorer

LOGGING IN
Launching the Extension / Add-On
Logging In

THE MAIN SCREEN
Incoming Notification

SEARCHING FOR CONTACTS
Call the Contact
Contact Options

PRESENCE MANAGEMENT
Locations
Locations
Availability
Schedule
Advanced
Extensions
Extensions
Dial using
85 Manage labels

86 **FAVORITES**
86 Messages
86 Timeline
87 Chat
87 Call
88 Actions

89 **GROUPS**
89 Add group
89 Members
90 Edit Group
90 Manage Group Members
91 Actions

91 **DIRECTORY**

92 **MENU**
93 Settings
93 Options
94 Alerts
96 Logout
96 Conversations
96 Start Conversation
97 Phone
97 Active Calls
97 Recent Calls
97 Dialpad
98 Collaboration

99 **CALL CONTROLS**

101 **CLICK-TO-DIAL**

102 **ACTION ITEMS**
103 WebEx / Hangout
104 Conference
105 Show on a map
106 Share location
107 Share document
107 Share web page
108 Clear history
108 Groups

109 **SALESFORCE INTEGRATION**
109 Salesforce Classic Integration
109 Call Center Definition File
110 Open CTI Integration
115 Using Salesforce
115 Inbound and Outbound Calling
117 Click-to-Dial
117 Calling from Chatter
118 Creating a Filter
120 Salesforce Lightning Integration
120 Call Center Definition File
121 Open CTI Integration
124 Using Salesforce
127 Click-to-Dial
127 Calling from Chatter
128 Creating a Filter

131 ILINK PRO DESKTOP FOR MAC

132 INTRODUCTION
132 Client Feature Comparison

132 PRE-REQUISITES
132 Download and Install
132 Installing .Net Framework from Microsoft

133 INSTALLATION

136 LOGGING IN
136 Simplified Interface
136 Authentication
136 Connection Settings
137 Login Failure
137 Credentials Discovery
137 Errors
138 Single Sign-on
138 UC Authentication
138 Google Apps Authentication
138 Windows Authentication
139 Officelinx Configuration

140 MAIN WINDOW
140 Contact Display
140 Recent Activity
141 Groups
141 Add Group
141 Phone Call
141 Call and Record
142 E-Mail
142 Text Messaging
142 Chat
142 Remove Member
142 Notifications
142 Move to Group
143 Search
143 Specifying Search Options
144 Dial-Out Extension
CALL MANAGER

Buttons / Icons

Hold

Transfer

Transfer to...

Mailbox

Phone

Location

Record

Handoff

Transfer to...

Mailbox

Phone

Location

Separate Window

MAIN MENU

Set Current Location

I will be at this location

Chat

Chat Broadcast

Company Directory

History

Call History

Call Information

Event History

Settings

General

Call Manager

Events & Notifications

Sounds

Help

LOCATIONS

Schedule

Availability

Extensions

WEB ACCESS

INTRODUCTION

GETTING STARTED

LOGGING IN

Google Authentication

Office 365 Authentication

Windows Authentication

UC Authentication
Officelinx Configuration

LOGGING OFF

THE MAIN SCREEN

WEB TUTORIAL

MESSAGING
  Message Icons
  Send a Message
  Sending the Message
  Send a Fax
  Messages
  Reading Messages
  Adding Attachments to a Message
  Live Reply (Dialing)
  Other
  Recovering Deleted Messages
  Emptying the Deleted Items Folder

Sending the Message

MESSAGING
  Message Icons
  Send a Message
  Sending the Message
  Send a Fax
  Messages
  Reading Messages
  Adding Attachments to a Message
  Live Reply (Dialing)
  Other
  Recovering Deleted Messages
  Emptying the Deleted Items Folder

Fax Jobs

Greetings
  My default greetings
  Location Greeting
  My custom greetings
  Message Forwarding
  Add new / Modify a forwarding address

LOCATION
  Change Current Location
  Current Location
  Availability at Current Location
  I will be at this location

Locations
  General
  Location Greeting
  Availability Filters
  Find me rules
  Assign Calls

Calendar
  Navigation
  Schedule a Location
  Adding/Modifying a Location Calendar
  Changing Your Active Locations Calendar
  Options

Addresses
  Phone
  Email
  Fax
  Beeper
  SMS
  Other

PEOPLE
191 Contacts
191 Add Contact
194 Search Contacts
194 Importing a Contact
195 Speech Enable Contacts
195 Call a Contact
196 Lists
196 Add / Modify a distribution list

198 NOTIFICATION
198 Schedule
199 Recurrence
200 Options
200 Notification Filters
200 Telephony Options
201 Wakeup Call

202 SETTINGS
202 Web Tutorial
202 Account
202 Account Settings
203 Voicemail Password
203 Domain Account Name
203 Synchronization Options
203 Last Synchronization Time
203 Miscellaneous Options
204 Interface Options
204 Call
204 Telephony Options
205 Re-route Options for CTI Integrations
206 Telephony Options
206 Webclient Options
206 Help

207 PASSWORD RESET

209 ILINK PRO - SUPPORTED PLATFORMS AND FEATURES

211 ILINK PRO FOR MOBILE DEVICES

212 INTRODUCTION

212 INSTALLING ILINK PRO
212 iLink Pro for Android
215 iLink Pro for iPhone

218 LOGGING IN

219 NAVIGATION
219 Across the top:
219 Across the bottom:
17 Avaya Officelinx Client Applications Guide

220 PEOPLE
220 Interactions Menu
221 Groups
222 Manage groups
222 Directory Search

223 CHATS

224 CALLS
224 Call Controls

226 UNREAD MESSAGES

226 TIMELINE

227 MY LOCATION

228 SETTINGS
229 Dial options

231 THE ILINK PRO WIDGET

232 INTRODUCTION

232 ILINK PRO WIDGET INSTALLATION

236 USING THE WIDGET
236 Toolbar
236 Location
237 Widget Contacts
238 Call
239 Search by Name
241 Send

243 APPENDIX A: REVISION HISTORY
In This Chapter:

20 SSL Proxy Setup
20 Installing Certificates
24 Server Authentication
26 SSL Proxy
SSL Proxy Setup

Establishing an SSL Proxy for the server will enable a greater level of security for transactions between users and their online data. This procedure is optional, but it is strongly recommended to ensure the highest level of data protection for corporate clients.

An SSL Proxy can be used with Avaya’s iLink Pro Desktop and iLink Pro Mobile (Android, iOS, BlackBerry) clients.

This procedure is performed only on the voice server, or on the Consolidated Server in a High Availability (HA) environment.

A security certificate must be acquired from a 3rd party source before proceeding with the setup.

Installing Certificates

1. To load the certificate into the operating system, open the Microsoft Management Console (MMC) on the server (go to Start and enter MMC.exe in the command line, hit Enter). The Root Console will open.
2. Under File, select Add/Remove Snap in....
3. Choose Certificates and click Add.
4. Select **Computer account** and click **Next**.

5. Click **Finish** to add the Certificates console to the MMC.

6. The Certificates snap-in has been added to the console. Click **OK** to close the window.
7. Open the Certificates snap-in and right-click **Personal**. Choose **All Tasks > Import**.

8. Click **Next** in the installation Wizard. Enter the full path and name to the Certificate file. Or click **Browse** to locate the file manually.

   Click **Next**.

9. At the prompt, enter the password to unlock the Certificate. Click **Next**.
10. Leaving all other settings at their defaults, click **Next**, then **Finish**.
Server Authentication

Once the certificate has been installed, the voice/consolidated server must be setup to use it for authentication requests.

1. Open the **IIS Manager** on the server (go to **Start** and enter **inetmgr** in the **Search** box).
2. Under the local machine, open **Sites**.
3. Right-click **Default Web Site** and select **Edit Bindings**.
4. From **Site Bindings**, choose **Add** and select **https** from the list of available types.
5. Pick the certificate from the list provided under SSL Certificate. Click OK to continue.

6. The binding between the server and certificate has been created.
SSL Proxy

To enable the SSL Proxy on the system, complete the following steps.

1. On the voice/consolidated server hard drive, in the C:\UC\UCSSL folder, run the SSLProxy.exe program.
2. Locate the certificate file on the hard drive and double-click to open it. Go to the Details tab.

3. Click Thumbprint and copy the displayed key text.
4. Use a text editor (such as NotePad) to open the `SSLProxy.exe.config` file, also located C:\UC\UCSSL folder, and replace the `CertificateThumbprint` value with the copied text.

5. Reboot the server.

The installation of the certificate and SSL Proxy is complete.
ILINK PRO DESKTOP

In This Chapter:

30 Introduction
30 Pre-requisites
31 Installation
34 Logging In
39 Main Window
40 Presence Management
41 Contact Management
48 Call Manager
52 Main Menu
Introduction

iLink Pro Desktop (iPD) is an all-in-one messaging and communication tool designed to aid the users with all aspects of communication. From eMail to phone calls, from text messaging to presence management, iLink Pro Desktop provides a one-stop solution where all methods of business communication can be conducted through a single, simple interface.

iLink Pro Desktop also offers seamless integration to vital business applications, such as Microsoft Outlook and Google Apps. Furthermore, iLink Pro Desktop for mobile devices is supported by most major mobile platforms (Google Android, Apple iPhone and iPad, and RIM Blackberry).

You can access your personal and company contacts, find anyone within the same company/organization, and initiate conversation with any of them through any means supported by iLink Pro Desktop.

Pre-requisites

Minimum Requirements

<table>
<thead>
<tr>
<th>HARDWARE and SOFTWARE REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC</td>
</tr>
<tr>
<td>Intel Pentium 4 (2.0GHz)</td>
</tr>
<tr>
<td>512 MB of RAM + 256MB RAM for Outlook</td>
</tr>
</tbody>
</table>

Operating System | Windows XP, Windows 7, Windows 8 |

Installing .Net Framework from Microsoft

Before you install iLink Pro Desktop, make sure that the .Net Framework installed on your computer is 2.0 SP1 or higher. The iLink Pro Desktop may crash if the version of .Net Framework is older than this, or if it is not installed on the computer.
Installation

1. In a Web Browser, go to the web addressable location for your UC Server (e.g. user.yourcompany.com).

2. Select Software Downloads.

3. Determine the location where the downloaded file will be saved. When ready, click Save.
4. When the download is complete, double-click the file to launch the installation program. When asked to confirm the running of the file, click **Run**.

5. The installation wizard will start. Click **Next** to continue.

**Note:** If you have other programs running (e.g. Microsoft Outlook, IBM Notes, etc.), shut them down before continuing with the installation.

6. The installer will ask you to select the install folder.

You may leave the value at its default, or click the **Browse** button to find the location. Click **Next** to continue.
7. At the confirmation screen, click Next to begin the installation.

8. The necessary files will be copied to the installation directory.

9. When the installation is complete, click Close.

iLink Pro Desktop is now installed on the computer.
Logging In

Simplified Interface

Authentication

There are several choices when it comes to connecting iLink Pro Desktop to the Officelinx server. From the dropdown menu, select from the following options:

- **Automatic Sign-in**: This setting will pull the Company, Mailbox and Password information from the Windows login credentials.
- **Automatic with alt credentials**: This setting is similar to the one above, but allows for the customization of the fields in the Authentication section. If the Windows credentials fail, iLink Pro Desktop will use the alternate values.
- **Manual Sign-in**: This setting is used to manually enter the login information. Windows login credentials cannot be used with Manual Configuration.
- **Single sign-on**: Select this option to login using Google Apps credentials (a Google account is required) or the Windows login details. Both require additional configuration in Officelinx. See page 36 for more details.

**Login**: Click on this button to log into iLink Pro Desktop.

**Exit**: Click on this button to exit the iLink Pro Desktop program.

If **Manual Sign-in** or **Automatic with alt credentials** was chosen, additional information is required before the program can login.

- **Company**: Enter the company number as appropriate. This will usually be 1 unless the phone system is servicing multiple corporations.
- **Mailbox**: Enter your Application User Name.
- **Password**: Enter the password for the mailbox.

**Hint**: Enable **Save password** so that the program will use the same credentials with each login.

Connection Settings

If you cannot log into iLink Pro Desktop, some additional settings may need to be changed through **More options**.

- **Server**: Enter the Officelinx server address. This address may be a URL (e.g. user.server.com) or an IP address (e.g. 123.123.123.123).
- **Port**: Enter the port number used by the Officelinx server for client application communications.

**Note**: If you cannot configure these fields properly, contact your system administrator for the correct values.
Login Failure

If a failure occurs during **Automatic Sign-in**, you will be returned to the login screen to specify additional parameters. You can change to use Manual Sign-In and enter the credentials yourself, or choose **Credentials Discovery**.

Credentials Discovery

This field allows you to use your Windows login information to directly log into the UC server. Your Windows login user ID can be tied to your UC mailbox so that you can log into the UC server using the same credentials. This feature is only be available if it has been setup by the system administrator.

**Default credentials:** Enable this checkbox to use the current Windows login information (the credentials used when logging into the current Windows session) to log into Officelinx.

**Windows user:** Enter the Windows login user name associated with the Officelinx mailbox.

**Domain:** Enter the domain that the user belongs to.

**Password:** Enter the password for the user.

Enable **Save password** to have the system remember these credentials with every log in.

Errors

When logging in to iPD, the system can respond with several error messages. Use this information to make corrections to the listed login credentials.
Single Sign-on

iLink Pro Desktop supports Single Sign-On. The same mechanism is used with Web Access and the Gmail sidebar gadget.

Select one of the 3 authentication methods to login to iLink Pro Desktop.

Hint: Enable the Stay signed in checkbox to have the browser remember your credentials. The browser will retain your details until you explicitly log out of the application. Leave this box unchecked to be prompted for your authentication method and login credentials each time the program is launched.

Google Apps Authentication

To use Google Authentication, you must have a Google Apps account. Contact your administrator for your account details.

Fill in the following fields:

  - Email: Enter the email address associated with the Google Apps account.
  - Password: Type in the password for the Google Apps account.

Click Sign in to launch the application.

Office 365 Authentication

To use Office 365 Authentication, you must have a Microsoft Office 365 account. Contact your administrator for your account details.

Fill in the following fields:

  - Enter the email address associated with the Office 365 account.
  - Type in the password for the Office 365 account.

Click Sign in to launch the application.
Windows Authentication

**Windows Authentication** uses the computer or network login credentials to provide access to the application.

Fill in the following fields:

- **User name**: Enter the domain and username for the corporate network separated by a backslash (i.e. `domainname\username`).
- **Password**: Type in the password for this account.

Click **Sign in** to launch the application.

---

**Warning**: The Google and Windows login routines cannot be used together. Each user account can be setup to use either procedure, but NOT both at the same time. The UC login is always available to all users.

---

UC Authentication

Click the icon to select **UC Authentication**. Enter a company number, mailbox and password to login to the system.

Fill in the following fields:

- **Company**: Enter the company number that you belong to. This will usually be 1, unless there are multiple companies managed from the same UC Server.
- **Mailbox**: Enter your mailbox number (must be numeric).
- **Password**: Type in the mailbox password.

Click **Sign in** to launch the application.
Officelinx Configuration

Both Google and Windows login require additional preparation by the Officelinx administrator before they can be used.

---

**Warning**: The Google and Windows login routines cannot be used together. Each user account can be setup to use either procedure, but NOT both at the same time. The UC login is always available to all users.

---

1. On the UC Server, go to **OL Admin > Company > Mailbox Structure**. Double-click the user’s mailbox to open the setup window.
2. Go to the **Advanced** tab.
3a. To use the **Google login**: in the **Domain Account Name** field, enter the email address associated with the user’s Google Apps account (i.e. *user@company.com*). Click **Save**.

3b. To use the **Windows login**: in the **Domain Account Name** field, enter the company domain name, followed by a backslash \ and the Windows username (i.e. *domain\username*). Click **Save**.
Main Window

From the main iLink Pro Desktop window, use Contacts, Groups, or the Search function to find a contact to connect with. Initiate a dialog with these contacts through any means common to both parties. Personal Presence settings can be managed from here as well.

For more information, refer to:

- Presence Management on page 40
- Contact Management on page 41
- Call Manager on page 48
- Main Menu on page 52
Presence Management

Locations

Locations allow you to easily change your presence settings. Presence encompasses your current location, numbers where you can be reached, and whether or not you will be available while at that location. iLink Pro Desktop comes with a set of typical locations predefined, but you can add and modify your locations through the Web Access interface by clicking on the Manage Locations option.

Note: The location may also be changed through the main menu Set Current Location option.

Normally, location will be managed through the locations calendar. There will also be times when it is necessary to manually alter location information temporarily: taking lunch a little later than usual, or being called into a meeting on short notice. The locations menu of iLink Pro Desktop gives presence flexibility.

To change current location, select the desired location from the menu. The location defined here will be used until the next scheduled event in the calendar. For example, if you are currently In Office at 12:05 PM and manually change location to At Lunch, your previously schedule meeting at 12:30 PM will change your location to Meeting at that time.

There is also the option to manually define the time period through the schedule feature. Once you use the schedule feature along with your locations, the next manual locations change that you make will follow the previous schedule that you have selected for your convenience.

Schedule

Schedule feature allows you to customize locations by modifying the time frame with the selected location. By default, the schedule will follow your locations calendar which can be configured through Web Access.

After selecting the desired location from the menu, select one of these options to define the time period for that location:

- Follow locations calendar: Ignore the manually selected location and use the one defined in the calendar.
- Until next scheduled: Keep the manually selected location setting until the next calendar event.
- Until I change: The location will not change again until it is again manually changed.
- For next 5 minutes: Stay at the current location for 5 minutes. The location will revert to the calendar afterwards.
- For next 10 minutes: Stay at the current location for 10 minutes. The location will revert to the calendar afterwards.
- For next 15 minutes: Stay at the current location for 15 minutes. The location will revert to the calendar afterwards.
- For next 30 minutes: Stay at the current location for 30 minutes. The location will revert to the calendar afterwards.
- For next 1 hour: Stay at the current location for 1 hour. The location will revert to the calendar afterwards.
- For next 2 hour: Stay at the current location for 2 hours. The location will revert to the calendar afterwards.
- For next 4 hour: Stay at the current location for 4 hours. The location will revert to the calendar afterwards.
- Till tomorrow: Keep the selected location for the remainder of the current day (until 12:00 AM). The location will revert to the calendar afterwards.
Availability

While availability is primarily controlled through locations, there is the option to define it manually. A manually chosen availability setting will override the settings associated with the current location.

**Available:** This option shows the user as available to everyone.

**Unavailable:** This option shows the user as unavailable to everyone.

**Appear unavailable if no caller ID:** Select this option to be shown as unavailable to callers that do not have Caller ID information (e.g. unknown or private numbers).

**Override availability filters:** Select this option to override any availability filters associated with the current location. When this option is on, the user will either be Available to everyone or Unavailable to everyone with no specific rules.

Extensions

If there are multiple extensions or phone numbers associated with a single location, the contact number can be selected from this menu. This will route callers through the selected number first, regardless of the preference configured in the location itself.

For example, if you have the Find Me/Follow Me configured, the UC server will try to locate you first through the selected number, then try other methods if there is no answer.

Contact Management

Recent Activity

iLink Pro Desktop displays all recent communications activity in the top portion of the main window. All recent conversations conducted through iPD are shown, whether incoming or outgoing. The number of items displayed is set in the General Settings menu.

For all phone conversations, clicking to the right of the contact opens a window allowing you to place a call or send a text message to that number or extension.

Contact Display

The screen shows the presence and location status for each contact. Their profile picture is also shown. The color bar to the left of the picture indicates availability (**available**, **unavailable**, **on the phone**). Online and Offline status appears beside the contact name. If there is no entry, that person is online. The contact's location (In Office, Meeting, etc.) is shown beneath the name.
Interaction Menu

Right-click on a contact to open the **Interaction** menu. This will allow you to initiate a conversation through any available channel. The options may vary between contacts since each can have different addresses available. For example, if a contact only has an external phone number assigned, only Phone Call and Text Messaging will appear on the list.
Groups

iLink Pro Desktop supports group organization, which is an easy and convenient tool for managing contacts. Create a group and add people from the company directory to keep track of their presence and availability. For individuals that are contacted frequently, add them to a group so they can be reached through phone, email, text messaging and Chat with a click of the mouse.

**Note:** Groups are linked to each mailbox and do not affect anyone else. Add or remove people from the local directory without affecting other people's contacts or groups.

Initiate actions with a contact from a group in two ways.

The status panel pops up when the mouse pointer hovers over the contact (below on the left). This panel allows you to view the details of the contact's status before initiating an action through the buttons. For information regarding the actions available on the panel, click on the responding buttons below.

The second method is accessed by clicking on the arrow to the right of the a contact, or right-click on the contact. This opens a comprehensive menu, providing a range of actions for the chosen contact.

**Note:** Some of these actions are available for members of the organization even when they are not part of a group (e.g. through directory or search).

Add Group

To create a group, click on the Add group button on the main menu, and enter the group name in the space provided.

With the group created, search for contacts, either through the search function or in the company directory. Click on the contact icon to bring up the following menu, and select a group for that individual. A contact can belong to more than one group.

There are many ways to start a conversation with the contacts in a group. Some options have additional menu items available depending on that contact's configuration. Move the mouse over a contact and click the arrow to the right to access the extended menu. Some items provide an additional sub menu when moused over.

Phone Call

From the Phone call menu, all of the numbers associated with the contact are listed (internal & external). Click on a number to initiate a telephone call to that person. Your desktop telephone will ring, and when answered, the call will be placed to the contact.
Call and Record 📊

To record a conversation, begin the call using the **Call and record** option. When the call is over, a voice message with the recording will be delivered to your inbox.

E-Mail 📧

From the **E-Mail** menu, compose and send email messages to any address associated with the contact. Once an address is selected, the default email program on the computer will open a new message window, pre-addressed to the contact.

Text Messaging 📩

From the **Text Messaging** menu, compose and send text messages to any of the addresses or phone numbers associated with the contact. Once the target is selected, a text messaging window will open already aimed at the contact. Type a message and hit **Enter** to send.

Chat 📩

From the **Chat** menu, send instant text-only messages to the contact if they are online. Selecting this option will open a messaging window. Type a message and hit **Enter** to send. Any responses will appear in the same window.

**Note**: Text Messaging and Chat share a common interface. Select the appropriate contact/method at the top of the window. Enter outgoing messages in the bottom frame. Both sides of the conversation appear in the upper frame.

WeLink Conference 🌟

Invite the contact to participate in a telephone conference call using the **WeLink conference server**. This option is only available if WeLink has been installed at the company site. Your telephone will ring, and you will be connected to the contact. Additional contacts can be added to the conference once the first call has been connected.

Remove Member ❌

To remove a contact from the group, select **Remove Member**. The contact will be removed from the group, but not from the system.
Notifications

Rather than relying on iPd’s main window to track contact status, there are Notification flags. Any combination of flags can be selected for each contact in a group.

- **Online/Offline**: A popup appears whenever the contact comes online / goes offline.
- **Phone**: User will be notified when the contact goes on the phone / gets off the phone.
- **Location**: This option sends a notification when the contact’s location changes.

When the contact changes status in any of the flagged areas, the notification window will popup on the screen.

Move to Group

From the Move to Group menu, you will be able to move the selected contact to another group. This option is only available if you have more than one groups. To move a contact, simply select the new group you wish to associate the contact with from the available list.

Search Related Documents

Search Related Documents allows you to check your documents (primarily e-mails) for entries that are relevant to the contact in question. It is only available if you have either Google Desktop or Windows Search installed on your computer. This option will be added to all interaction menus available throughout iLink Pro Desktop.

**Note**: In order for this integration to function properly, install Google Desktop or Windows Search before installing iLink Pro Desktop. If Google Desktop or Windows Search is installed afterwards, reinstall the iLink Pro.

When chosen, iLink will use either program to search through your history to find entries that are related to that contact. This may also be automated through Call Manager by enabling Auto Search. When active, iLink will automatically cross reference the incoming Caller ID with a contact, and then search for all related messages.
Search

iLink Pro Desktop’s built-in search engine allows the company directory, and a user’s personal and public contacts to be scanned for a specific individual. There are a few rules that you should keep in mind when searching for a contact:

![Search Results](image)

**Note**: When searching for a name, type `First_Name"space"Last_Name` (e.g. John Carter) or `Last_Name,First_Name` (e.g. Carter, John).

If the person has spaces in their first name, the `Last_Name,First_Name` format is recommended.

iLink Pro Desktop keeps a record of previous searches. While typing a search string, iPD will display recent matches, but the list may not display every hit in the database. For best results, press the **Enter key** after typing the search string.

You can initiate a conversation from the search results. Click on the icon located to the right of the search results to open up the interaction menu.

**Note**: The options will vary depending upon the information available for the contact. If the contact only has an email address specified in the system, only the email/text message selection will appear.

**Note**: For details on each of the individual interactions, refer to **Call Manager on page 48**.

Specifying Search Options

In larger databases, searching through all of the entries may take some time. Reduce the search time by specifying exactly where iLink Pro Desktop will look. However, since most contact information is stored on the server by default (including your private contacts on UC mailbox), it is best to leave this at **Server-side search**.

- **Server-side search**: iLink Pro Desktop will search for the contact in the server’s contact and directory database.
- **Search locally**: iLink Pro Desktop will search for the contact on desktop computer.
- **Cached results and actions**: iLink Pro Desktop will search through stored results from previous searches and actions.
Dial-Out Extension

iLink Pro Desktop allows you to change the source of outgoing calls. The numbers available are derived from the numbers associated with the current mailbox.

Alternately, select Custom and manually enter the source Type and Number/Extension in the spaces provided.

When initiating a call using an external number as the source, Officelinx will call the source number first. Once that call is answered, the server will dial the destination, and then link the two calls together.

This allows users to control calls with iLink Pro Desktop wherever they are located. In all cases, whichever external number is selected, the recipient will always see the number associated with the Officelinx server, which will usually be the number of the office. This permits a high level of privacy regardless of a caller's location.

When making long distance calls, this may be a cost efficient solution as well. Since most companies have much more competitive rates for long distance calls than a typical cellphone or household, having the UC server dial both parties will take advantage of the company's dialing plans, preventing the external number from accumulating long distance minutes.
Call Manager

iLink Pro Desktop is able to control phone calls through the Call Manager interface on the desktop. When receiving a call through a device that is integrated with the UC server, there will be a section added to the bottom of iLink Pro Desktop's Main Window. Whenever you hover the mouse over a call entry, additional call control actions will appear.

**Note:** The Call Manager may be accessed from a separate window. Refer to **Settings** on page 56 to configure the feature.

**Note:** The Call Manager may be enabled for outbound calls. Refer to **Settings** to configure the feature.

**Note:** You can control more than one phone call simultaneously via the Call Manager.

**Note:** Actions available during call control will vary depending on your site's settings.

Through Call Manager, the following options are available **before** answering a call.

- **Answer:** Pickup the call. Specify which device will be used to answer the call if more than one device is defined for the current location.
- **Answer and record:** Select this option to answer the call and begin recording the conversation right away.
- **Take Message:** Send the caller directly to voicemail.
- **Hold:** Places the call on hold.
- **Transfer:** Redirect the call to another extension.
- **Remove:** Select this option to remove the selected call from the Call Manager. This does not affect the phone call itself.

Through Call Manager, the following options are available **after** answering or **during** a call.

- **Hang Up:** End the current call.
- **Hold:** Places the call on hold.
- **Transfer:** Redirect the call to another extension.
- **Call Handoff:** Select this option to pass the call to another device.

**Note:** Call Handoff may not be available depending on mailbox configuration. Please consult your system administrator for more information.

**Start Record:** Begin recording the current call.

**Remove:** Select this option to remove the selected call from the Call Manager. This does not affect the phone call itself.

**Note:** Upon receiving an incoming fax (iPD must answer the call to identify it as a fax), the pop-up will display different information. The call is now identified as a fax message, the receive status of the transmission is displayed, and the option to answer the call is removed.

Answering the call before the iLink Pro Desktop picks up will interrupt this process.
Buttons / Icons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td><strong>Incoming Call</strong>: This icon represents an incoming call.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Answered Call</strong>: An answered call that is currently ongoing.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Finished Call</strong>: A completed call or a Hang up.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Answer</strong>: Click this button to answer an incoming call. The device that answers the call can also be selected.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Answer and Record</strong>: Click this button to answer the call and begin recording the conversation right away. The device that answers the call can also be selected.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Take Message</strong>: Send the caller directly to voicemail.</td>
</tr>
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<td>![Icon]</td>
<td><strong>Hold</strong>: Places the call on hold.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Remove</strong>: Click on this button to remove the selected call from the Call Manager. This does not affect the phone call itself.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Start Record</strong>: Click on this button to begin recording a call already in progress.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Pause Record</strong>: Click on this button to temporarily stop recording. Click again to resume.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Stop Record</strong>: Click on this button to stop the recording. The recorded conversation will be arrive as a new voicemail.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Transfer</strong>: Click on this button to redirect the call to another extension or device.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Call Handoff</strong>: Click on this button to pass the call to another device seamlessly.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Call Back</strong>: Click on this button to return the call.</td>
</tr>
</tbody>
</table>

**Hold**

When receiving a call, or after answering a call, that call can be put on hold. When a call is on hold, there are the following options.

- **Stop Hold**: Select this option to end the hold and re-initiate the conversation or let the call ring again.
- **Transfer to...**: Select this option to transfer the call on hold to another location. Refer to Transfer on page 50 for more details.
- **Transfer to #**: Select this option to transfer the call to one of the other numbers associated with your mailbox.
Transfer 📞

With the Call Manager, a call can be transferred to either a number predefined by the mailbox account, or a manually defined location.

Transfer to...

**Transfer to...** allows a call to be transferred to a user defined location. This location can be a Mailbox, Phone Number or a presence Location.

Mailbox

With the Mailbox option, browse for the destination mailbox by clicking on the **Find** button in the **Transfer to...** window. Search for the target by the name associated with the mailbox or the mailbox number.

Phone

If choosing the **Phone** option, define the destination phone number by clicking on the Build button. After selecting the type of phone number (internal extension or an external number) fill in the boxes with the necessary information, then click **OK**.

Location

Specifying the **Location** option requires the user to select a pre-define location from the drop down menu. The call will be transferred to the default number associated with the chosen location.

Record

When recording a call, the Call Manager menu changes. The user can pause and resume recording during the call. When recording is stopped, or when the call ends, the recorded conversation will be sent to the user’s mailbox as a voice message.

**Continue Record**: Resumes recording. This option is only available when recording is paused.

**Pause Record**: Pause recording. Click it again to Continue recording at any time.

**Stop Record**: Select this option to stop the recording. When this option is chosen, the recording will be sent to the user’s mailbox.
Handoff

**Call handoff** permits the seamless transfer of a call to another device (e.g. from a desktop extension to cellphone). Unlike typical transfers, call handoff will not prompt the caller for any action. When a handoff is started, the target device will ring. When answered, the previous device will be disconnected and the call will be immediately routed to the new device. A call may be handed-off multiple times as long as Call Manager is available.

**Note:** Call Handoff may not be available depending on mailbox configuration. Consult the system administrator for more information.

Transfer to...

The **Transfer to...** option allows a call to be passed to a manually defined location. This location can be a Mailbox, Phone Number or from a presence Location.

Mailbox

With the Mailbox option, browse for the destination mailbox by clicking on the **Find** button in the **Transfer to...** window. Search for the target by the name associated with the mailbox or the mailbox number.

Phone

If choosing the **Phone** option, define the destination phone number by clicking on the **Build** button. After selecting the type of phone number (internal extension or an external number) fill in the boxes with the necessary information, then click **OK**.

Location

Specifying the **Location** option requires the user to select a pre-define location from the drop down menu. The call will be passed to the default number associated with the chosen location.

Separate Window

For users with a high volume of calls, the main window of iLink Pro Desktop may be inconvenient. In these situations, it is possible to open a separate Call Manager window so that all calls appear in a larger pane with oversized buttons for ease of operation. The behavior of the call controls is the same as in the integrated Call Manager window.
Main Menu

Access the main menu by clicking on the Avaya button.

**Note:** This menu is also accessible through a right-click of the Taskbar icon.

All personal settings may be managed from this menu. Presence and core iLink Pro Desktop configurations are available from here.

- **Set current location:** Change user location to one of the pre-defined options.
- **Add Group:** Create a new personal group.
- **Web client:** Launch Web Access in a browser and log-in automatically with the current credentials.
- **Chat:** Open a chat window to corporate contacts or group members who are online.
- **Company directory:** View the directory of the organization.
- **Call Manager:** The Call Manger window provides viewing and call control options for current calls.
- **Call history:** Displays the past call details for the mailbox.
- **Event history:** Shows the events that have occurred at this mailbox.
- **Settings:** Provides access to the settings menu where most of the configurations are done.
- **Help:** Gives access to miscellaneous features and the help file.
- **Logout:** Sign off of iLink Pro Desktop.
- **Exit:** Select this option to log out and close iLink Pro Desktop.

Set Current Location

View and modify your current location details. Keep in mind that location can also be changed from the main iLink Pro Desktop window’s shortcut icons.

To use the location currently define on your calendar, enable the **Use my locations calendar** radio button. To manually define a custom location, enable **Override my locations calendar**, then configure the fields as required.

- **Current Location:** Choose the current location from the dropdown menu.
- **Phone Number:** From the drop down menu, select the phone number to use for this location. The list of available numbers depends on the location currently chosen.
- **Availability:** From the dropdown menu, select availability for this location.
- **Appear unavailable if no caller ID:** Enable this checkbox to appear unavailable if the system cannot detect a caller ID on an incoming call.
- **Override Availability Filters:** Enable this checkbox to have the availability specified here override any filters pre-configured for this location.
I will be at this location

Define the duration that the current location will be active.

**Until I change my location:** The current location will be permanent until manually changed.

**Until the next scheduled activity or the beginning/end of working hours:** The currently location will remain active until an event in the calendar changes it, or until the end of the current working day. The location will revert to the calendar schedule after either of these conditions are met.

**Till:** Select this radio button to specify the exact time and date for the current location to expire. The location will revert to the calendar schedule at the selected time.

**Edit my locations...** Click on this button to open Web Access to directly manage locations.

Chat 📤

Chat creates an instant messaging session with anyone that is currently online in the same UC system (e.g. those who are in the same company). Chat is an easy to use alternative to phone conversation when you wish to leave a short message or get in contact with someone while they are already on the phone.

Enter the name or the mailbox extension of the person you wish to contact.

To communicate through Chat, type the desired message in the text field at the bottom, then press **Enter**, or click the **Send** button.

**Save:** Click to save the Chat conversation as a text file. The **Save As** window will open to specify the location and the name of the file that is to be saved.

**Clear:** This will clear the conversation history for the current Chat window.

**Kind:** If the recipient of the message has an SMS address defined on their mailbox, there will be the option in this dropdown menu to select **Chat Only** or **Chat/SMS**. The Chat/SMS option will send a Chat message and copy the same message to the recipient's SMS address.

- During a conversation, you can immediately place a telephone call, email or text message to the party.
Chat Broadcast

**Chat Broadcast** will send a Chat message to everyone within your company that is currently logged into iLink Pro Desktop.

If a user replies to a Chat Broadcast message, a new Chat window will open for that individual user. This means that if there is a large user base, and everyone who receives the message replies to it, there will be a significant number of Chat windows opening simultaneously.

---

**Caution:** Remember that Chat Broadcast messages are instantly delivered to everyone currently logged in to the system. Careless use of this feature will flood all users with a stream of message pop-up windows.

---

Company Directory

The **Company directory** shows the other mailbox accounts associated with the current Company.

The company directory will usually be divided into departments to make finding a particular individual easier. Right-click a mailbox account to open the menu shown here.

This menu provides the standard options to initiate contact with the person or add them to your personal group.

---

History

**Call History**

**Call history** keeps track of all incoming, outgoing and missed calls. Click the telephone icon beside an entry to see detailed information for that call.

---

**Call Information**

Clicking on the phone icon for a call history entry shows the details of that call. If the entry is not a missed call, there will also be an entry for the duration of the call.

**Note:** If the Missed Call History is not cleared, the user will receive a notification for the event when logging into iLink Pro Desktop. Only the Missed Call History will be cleared when clicking the Clear History button while viewing missed calls.

Assuming that caller ID is available, the user will have the option to call back any contact in the call history. Click the arrow icon to open a menu with the option to call the contact, or remove them from the history list. To clear the entire call history, click **Clear History** at the top of the window. This provides the option to clearing all incoming or outgoing message from the history.
Event History

The **Event History** keeps track of most actions performed within the iLink Pro Desktop. Any log-in sessions, outgoing and incoming conversations, and message notifications are all recorded in the event history. To view the details of an event, Event History will prove to be a valuable tool.

You may also organize Event History periodically by using the buttons available at the top.

- **Remove history record**: Delete the selected entry from the history.
- **Clear History**: Click to delete all entries in the history.
Settings

Use Settings to configure the core details of iLink Pro Desktop. Refer to the appropriate section to learn more about what each setting does.

General

**UI language**: From the dropdown menu, select the language the program interface should use.

**Automatically run iLink Pro when I log on to Windows**: When enabled, this will automatically launch iLink Pro Desktop when Windows starts.

**Allow Automatic sign in**: Enable this checkbox to automatically log into the iLink Pro Desktop when the program is launched. Select **Save password** at the login screen in order for this feature to function.

**Auto-reconnect**: Enable to automatically reconnect to the iLink Pro Desktop when being logged out through means other than deliberately action.

**Single messaging window**: Combines all Chat windows into a single, tabbed window, instead of one open window per contact.

**Secure Web**: Web Access will use HTTPS protocols instead of HTTP for secure communications.

**Number of recent items**: Specify the number of recent conversations to display in the main window.

- **Recent items on top** - Show any recent activity at the top of the window. When disabled, recent activity will appear beneath the contacts and groups displayed.
- **Remember Chat destinations** - Include Chat conversations in the recent activity display.
- **Remember phone numbers** - Include telephone conversations in recent activity display.

**Default search engine**: From the drop down menu, select the default engine that will be used when searching for related documents.

**Change Password**: Click on this button to change the mailbox password.

Call Manager

**Separate Call Manager window**: Enable this checkbox to allow call manager to be accessible through a separate window.

**Automatically close when no remaining calls**: Automatically close the separate call manager window when all calls are finished.

**Record all incoming calls**: Make a recording of all incoming calls.

**Outbound call control**: Make the Call Manager available during outbound calls.

**Save dial-out extension**: Save the last used custom dial-out extension. The setting will be kept until it is changed.

**Call popup**: From the drop down menu, select the method of notification when receiving incoming calls.
- **Off**: Do no ask an incoming caller for their ID (number) if it is unrecognized by the system. Do not display it in a screen popup.
- **Ask**: Prompt an unidentified caller to enter their phone number on the telephone keypad.
- **Pop**: Display an incoming caller’s phone number.
**Ask & Pop**: Ask an unrecognized caller to enter their phone number and display that number in a screen popup.

**Auto-search**: Enable this checkbox to automatically search for all documents on the computer related to the caller based upon their name and phone number. This feature requires Google Desktop or Microsoft Search / Microsoft Desktop Search.

**Auto-cleanup old calls (days)**: Enter the number of days that the call history will be kept.

**Default action**: From the dropdown menu, select the action that iLink Pro Desktop will automatically take when a call is received.

- **No Action**: The iLink Pro Desktop will not perform any action when a call comes in.
- **Take Call**: iPD will answer the call, regardless of the presence of the user.
- **Take message**: Automatically sends the caller to voicemail.
- **Transfer**: Forward the call to the destination defined in the Transfer To... window, accessed through the Set/Check button.

**Transfer is not selected as default action**: When **Transfer** is selected as the Default action, the **Set/Check** button will become active with additional choices available to specify the destination of the transfer.

- **Mailbox**: Select this radio button to forward the caller to another mailbox in the system. Click **Find** to search for the contact.
- **Phone**: Select this radio button to forward the caller to a specific phone number. Click **Build** to specify internal or external numbers and the necessary details (Country code, Area code, Phone number).
- **Location**: This will forward the caller according to the location settings defined for the current location.

**Handle callto: links**: Enable this checkbox to allow calls to callto: links on the web.

**Handle tel: links**: Enable this checkbox to allow calls to tel: links on the web.

**Events & Notifications**

**Disable sounds/notifications if unavailable**: Disables all sounds and notifications messages if the availability is Not Available.

**New message sounds from active chat window**: Receive sound notification even when in an active Chat chat window.

**New message notification**: Receive a popup notification when a message (text, voice, fax) arrives in the mailbox.

**Record beep**: Plays the record beep when you barge-in. This feature notifies you when the barge-in is successful by playing the record beep file.

**Tray animation**: Enable this checkbox to turn on the animated icon on the Windows Taskbar whenever there is an unchecked event.
Sounds

**Turn sounds off:** Enable this checkbox to disable all sounds within iLink Pro Desktop.

**Connected:** Define the sound that will be played when you log into iPD.

**Disconnected:** Define the sound that will be played when you disconnect from iLink Pro Desktop.

**Incoming Call:** Define the sound that will be played when you receive an incoming call.

**Receiving fax:** Define the sound that will be played when you receive an incoming fax.

**Record Started:** Define the sound that will be played when the call recording starts.

**Chat Message:** Define the sound that will be played when you receive a Chat message.

**New Message:** Define the sound that will be played when you receive a new message (text, voice, fax) in your mailbox.

**User Online:** Define the sound that will be played when a tracked user comes online.

Plug-ins

You may enable various iLink Pro Desktop plug-ins on this screen. Select a plug-in and click the buttons below.

**Configure:** Modify the settings for the selected plug-in.

**On/Off:** Use this button to activate/deactivate the selected plug-in. The status of the plug-in will change to reflect the status.

**Refresh:** Update the displayed status of all plug-ins.

For details regarding each plug-in, refer to **Plug-Ins on page 60.**

Help

**About:** Select this option to view the version information regarding iLink Pro Desktop.

**Documentation:** Select this option to view the iLink Pro Desktop help file.

**Collaborate:** Select this option to start the collaborate service. This has to be configured by your system administrator in order to function properly. When configured, you will be automatically taken to the collaboration web site that your company uses.

**Show Log:** Select this option to display all activity logs for iLink Pro Desktop. This information is used for troubleshooting by the technicians.
In This Chapter:

60 Introduction
60 Plug-Ins
60 Bluetooth
61 Microsoft Outlook
61 Smart Tags
61 TAPI
62 Outlook Plug-In
66 IP Dialer
Introduction

iLink Pro Desktop has a wide range of plug-ins available to make communicating as efficient as possible. Integrate current systems with various online and desktop applications that streamline the daily routine through Unified Communications.

Settings

You may enable various iLink Pro Desktop plug-ins from the plug-in section of settings.

Configure: Modify the settings of the selected plug-in.
On/Off: Activate/deactivate the selected plug-in. The status of the plug-in will change to reflect the status.
Refresh: Update the status of all plug-ins.

Plug-Ins

Bluetooth

The iLink Pro Desktop can integrate with a bluetooth device to track your physical location and update your location within iLink Pro Desktop. If the bluetooth equipment on the computer requires a specific driver to function, the iLink Pro Desktop may not be able to integrate with the device that you are pairing to keep track of your location.

Configure

The Bluetooth plug-in may be used with most Bluetooth devices. In most cases, this function is used to connect to a Bluetooth enabled cell phone since it is the item that you are most likely to carry with you at all times. When the phone that is tracked by the iLink Pro Desktop plug-in goes out of range, it will perform the action that defined on the configuration section.

Device: From the drop down menu, select the Bluetooth device that you will be using to track your physical location.
If the device is in range then...: Select the action that iLink Pro Desktop will take when the device is detected. Choose between do nothing, use the location calendar, or select a location from the drop down menu.
If the device is out of range then...: Select the action that iLink Pro Desktop will take when the device becomes undetected (out of range or turned off). Choose between do nothing, use the location calendar, or select a location from the drop down menu.
In range first: Enable to have the out of range action only occur if the device was detected (in range) initially.
Microsoft Outlook

iLink Pro Desktop can interact with the contact entries of Microsoft Outlook. When the iLink Pro Desktop detects an incoming call, the caller ID information is cross referenced with contact information within Outlook. If there is a match, iLink Pro Desktop will open the contact information.

Configure

Enable loading plug-in in Microsoft Outlook: Adds the iPD button to the Outlook screen.

Lookup matching contact on new call: When enabled, Outlook will search for a match to the caller’s information in the contacts list.

Add new contact if not found: Create new contact in Outlook if the current caller’s information cannot be matched to an existing entry.

Hide call manager if found: Call Manager will minimize when a match is found.

Lookup matching contacts using UC Client search: Enable this to expand the search for a match to include the iPD database (e.g. the company directory).

Smart Tags

The Smart Tags plug-in allows iLink Pro Desktop to detect extension/phone numbers copied to the clipboard.

When the user cuts/copies a number string, a pop-up appears which allows the user to initiate a call with that number. From the pop-up window, users have the option to call, call and record, or send an SMS message.

Configure

Clear clipboard on dial: Enable this option to erase the contents of the clipboard after dialing the number.

TAPI

The TAPI plug-in enables other applications to perform dialing through iLink Pro Desktop. This plug-in is also used by the Outlook Plug-In through IP Dialer on page 66.
Outlook Plug-In

If you have Microsoft Outlook installed on your computer, the iLink Pro Desktop can integrate with it to conveniently access all iLink Pro Desktop features together with the voice message control support.
Menu Items

| ![Status](image) | **Status**: Refer to this section to see if you are logged into the iLink Pro Desktop. |
| ![Locations](image) | **Locations**: Click on this button to change your location settings. |
| ![Availability](image) | **Availability**: Click on this button to change your availability. |
| ![Extension](image) | **Extension**: Click on this button to define your preferred device for accepting calls. |
| ![New Voice Message](image) | **New Voice Message**: Click on this button to create a new email message with a voice file attachment. |
| ![Company Directory](image) | **Company Directory**: Click on this button to open the company directory. |
| ![Chat](image) | **Chat**: Click on this button to initiate a Chat session with desired party. |
| ![SMS](image) | **SMS**: Click on this button to send an SMS message to the desired party. |
| ![Web Client](image) | **Web Client**: Click on this button to launch Web Access. |
| ![Preview](image) | **Preview**: Click on this button to enable/disable voice message preview. |
| ![Settings](image) | **Settings**: Click on this button to modify iLink Pro Desktop settings. |
| ![Help](image) | **Help**: Click this button to access the online help documentation. |
| ![About](image) | **About**: Click on this button to access information about the iPD Outlook Plug-In. |

**Note**: Refer to the appropriate section of the iLink Pro Desktop chapter, page 59 and following, for complete details on all of these features.

Voice Message Control

The iLink Pro Desktop Outlook Plug-In will automatically detect voice messages (audio files) attached to an email. Voice messages have additional playback controls.

Through the Voice Message Control options, users can call the person who left the message through the **Call** button. The message can also be played through the computer speakers by clicking on the **Play** button, or it can be played using another device such as your telephone.

You can also create new voice messages using the same interface. Click on the **Record** button to start recording your voice message then **Stop** when you're done. The recorded message will be shown as an attachment on your e-mail message. Messages can be recorded through your computer’s microphone or through an integrated telephone.

**Note**: If you are using Microsoft Office 2003, having Microsoft Word as your default email editor/composer will disable the record function.
Calendar Management

The iLink Pro Desktop Outlook Plug-In is able to apply UC location settings to a calendar entry, allowing you to easily customize each of your calendar events to include UC location information. For example, you can associate meeting entries in your calendar with the Meeting UC location, allowing your availability and extension to be also changed accordingly when the calendar event occurs.

To apply a UC location to a calendar event, select a location from the Appointments bar or the Outlook ribbon. You may also specify the availability settings if you do not wish to use the location's default value.

**Note:** You can append UC location information to existing or new calendar entries. However, you cannot manually assign a UC location to reoccurring events. Reoccurring events will be flagged as “Meeting” UC location by default.

**Note:** The Presence controls will not be visible when setting up or editing a meeting that has the All day event button enabled. Uncheck this box to enable Presence controls.
Contact Hover Cards

**Note:** Only contacts that have been added to a Group in iLink Pro Desktop will have their presence and availability status readable in Outlook. Only the email connection icon on the Contact Hover Card will be active for these unlinked contacts.

With Outlook 2013, holding the mouse over a contact or an email address will bring up the **Contact Hover Card**.

![Contact Hover Card Image]

The color panel to the left of the contact's picture or email address, shows their current availability status.

- **Green:** The contact is available.
- **Red:** The contact does not wish to be disturbed, or is away from their desk. Any calls will be routed according to the contact's presence settings.
- **White:** The availability of the contact cannot be determined.

On the Contact Hover Card, their current location is displayed beneath their availability text. When a contact is on the phone, the notice will change to **On the Phone** and their availability will switch to **Do not disturb** until they hang up.

Click one of the icons along the bottom of the card to communicate with the contact by the selected means.

- Send an instant chat message (IM) to the contact's mobile device.
- Place a telephone call to the contact. The program will ring your currently selected device, make the call to the contact, and then connect both calls. If the contact has more than one number in their details, an arrow will appear to the right of the icon to select which destination number to use.
- Launches a Video phone call to the contact. Both parties must have video capability configured to use this option. If there are problems connecting on either side, then a standard telephone call will be made instead.
- eMail the contact at the address associated with their account.
IP Dialer

The IP Dialer offers the convenience of dialing phone numbers from any application that supports a modem. iLink Pro Desktop receives events from IP Dialer to take the phone off hook, dial the number and replace, passing them on to the server to take proper action.

**Note:** iLink Pro Desktop must be running in order to successfully dial phone numbers using IP Dialer.

**Note:** IP Dialer is **not** supported in a Citrix environment.

Placing a Call Through IP Dialer

The IP Dialer can be used with any application that supports a modem. These applications include ACT! and Outlook. Refer to your third-party software for details.

This example demonstrates how the IP Dialer is used in Microsoft Outlook 2013.

When you right click on a contact entry from Outlook, you will notice the **Call** option. This item is available throughout the Microsoft Outlook interface when dealing with a contact entry.

When you select this option, you will see the following window. The contact to be called and their number will be automatically filled out for you. If desired, you may manually enter a different number to dial as well.

If this is the first time you’re using IP dialer, you must ensure that you have the correct device selected for the action. Click on the **Dialing Options** button.

**Note:** This window is not supported in Outlook 2013 and will not appear. Dial directly from the dropdown menu, selecting the correct number to call from the list for that contact.
From the **Connect using line** dropdown menu, select **UC Line**, then click **OK**. You do not have to repeat this process every time. Once you have selected the entry, it will be used during subsequent dial actions.

When you're back on the New Call window, click **Start Call**. Your call status will change to connected, and the UC server will automatically dial out using your integrated workstation phone. If your dial out number on the iLink Pro Desktop is set to an external number or an unintegrated phone, the UC server will first call you at your dial out number. When you answer the call, UC server will call the contact's number and bridge the call between your device and your destination.

When your call is finished, hang up the phone then click the **End Call** button.
Introduction

Avaya iLink Pro allows users to take advantage of UC functionality within a web browser. It is installed on the local computer as an extension to Google’s Chrome browser, or as an add-on to Microsoft’s Internet Explorer. Both versions are designed to integrate with existing Google solutions, allowing you to easily access UC features on a familiar platform.

iLink Pro provides access to your contact list and the company directory, so making telephone calls and Internet messaging is only a few clicks away. All voice and email messages are reachable through iLink Pro. Your location and availability can also be controlled, so contacts and colleagues always know how to reach you.

iLink Pro provides a complete mobile UC solution that meets your most demanding communication needs.

**Note:** By default, Chrome will block pop-ups while browsing. iLink Pro, when used as a plug-in with Salesforce, requires pop-ups to access advanced searches to identify incoming callers and access records. To ensure complete functionality, enable pop-ups when using the Salesforce plug-in.

**Note:** Microsoft Internet Explorer 11 or later is required to install the iLink Pro add-on. There are no version restrictions for Google Chrome.

**Warning:** Running multiple editions of iLink (iLink Pro or iLink Pro Desktop) at the same time will cause conflicts between the programs. Disable all other editions except iLink Pro, if installed, to avoid problems.
Downloading and Installing

Avaya iLink Pro can be installed as an extension to Google's Chrome, or as an add-in to Microsoft's Internet Explorer web browsers. Follow the appropriate procedure outlined below.

Installing to Google Chrome

The Avaya iLink Pro extension is installed from the Chrome Web Store.

Hint: The site administrator can setup user or company profiles to automatically install (push) and configure iLink Pro. Refer to Google's documentation at the address below for further details: https://support.google.com/chrome/a/answer/1375694?hl=en

1. Open the Chrome web browser and go to the Chrome Web Store at https://chrome.google.com/webstore.
2. In Search the store, type iLink and hit enter. Click on Extensions.

3. Click + ADD TO CHROME beside Avaya iLink Pro to launch the installer.

4. When prompted, click Add Extension to confirm the installation.

The installation is complete. You will be required to select the credentials to use to login to the extension.
Installing to Microsoft Internet Explorer

The Avaya iLink Pro add-on is installed directly from the link shown below. The add-on is controlled and managed by the Esna iLink Add-Ons for Internet Explorer application.

**Note:** The add-on is supported by Internet Explorer 11 and later.

**Important:** Downloading applications through iChrome requires access to the following sites: clients2.google.com and clients2.googleusercontent.com. Ensure that your network firewall and security protocols are open to both locations. If access is impaired, the download may fail with errors.

1. Open Internet Explorer and go to [https://manage1.esna.com/ichrome/iChrome.application](https://manage1.esna.com/ichrome/iChrome.application).
2. The installer will prepare to install the add-on.

![Launching Application](image1)

3. A prompt to confirm the installation will appear. Click **Install** to continue.

![Application Install - Security Warning](image2)

4. If presented with a security warning concerning files to be installed, click **Run** to continue with the installation.

![Open File - Security Warning](image3)
5. Internet Explorer should not be running during the installation. If prompted to close IE, select:

**Yes**: Click here to automatically close IE before continuing with the installation.

**No**: Use this option to allow IE to keep running during the installation. IE must be restarted before using the program.

**Cancel**: Close IE manually, then click this button to continue with the installation.

6. The Add-on will be installed.

7. When the installation is complete, the **Avaya iLink Add-Ons for Internet Explorer** window will appear.

   If you did not close the browser, this screen will appear after IE has been restarted.

   Click the box for Avaya iLink Pro to enable the extension.
8. A check will appear in the upper right corner of the Avaya iLink Pro box indicating that the extension has been loaded into Internet Explorer.

The installation is complete. You will be required to select the credentials to use to login to the add-on.
The Avaya iLink Add-Ons for Internet Explorer

The **Avaya iLink Add-Ons for Internet Explorer** tool is used to enable and disable Esna's add-ons for Internet Explorer. Whenever IE is running, the Avaya iLink Add-Ons for Internet Explorer icon will appear in the Windows System Tray.

1. Double-click the icon to launch the selection program.

   **Hint:** After the installation, the Avaya iLink Add-Ons for Internet Explorer will only appear in the system tray once Internet Explorer is started.

2. Click an Add-On to enable/disable it in Internet Explorer.

![Avaya iLink Add-Ons Selection Program]

**Note:** Each add-on requires separate licensing. Enable only those add-ons you have purchased.

**Note:** Esna iLink Pro and Esna iLink for Cisco Jabber cannot be run at the same time. Launching one will force the other one to close. Esna iLink for WebEx can be run with both of the other add-ons.
Additional Considerations

- The selected add-ons and Avaya iLink Add-Ons for Internet Explorer will be launched automatically each time that Internet Explorer is started.
- Closing the Esna toolbar will disable the add-ons for Internet Explorer. To relaunch, the add-on must be enabled from within IE (go to Tools > Manage Add-Ons under Toolbars and Extensions).
- If the add-on cannot connect or login to the server, the icon in the Esna toolbar will be gray. Click the icon to start the login procedure.
- In IE, removing all websites listed under Compatibility View is required for Avaya iLink Pro to be able to login to the servers. Go to Settings > Compatibility View Settings and ensure that there are no websites listed.
Logging In

Launching the Extension / Add-On

Start the application by clicking on the Avaya iLink Pro icon.

If enabled, clicking on the slider will also start the program in both Chrome and Internet Explorer.
Logging In

The login procedure for the Avaya iLink Pro extension for Chrome and the Internet Explorer Add-On are identical.

If the extension does not start automatically, click the icon or the slider.

1. At the login window, choose which credentials to login with from the dropdown menu.

2a. When selecting Google credentials, you will be asked which Google account to use to access the program with. Choose an account, or enter the details for another.

Click Allow to give the program the necessary permissions to your data.
2b. When selecting **Office 365** credentials, you will be taken to the login window where you must enter your credentials. When finished, click **Sign in**.

![Sign in](image)

**Note:** An active Office 365 account is required to use this option.

2c. When selecting **Salesforce** credentials, a browser page will open to the Salesforce login screen.

Enter your Salesforce username and password in the spaces provided.

Click **Log in to Salesforce**.

If prompted to grant iLink Pro the necessary permissions, click **Allow**.

![Salesforce login](image)

**Note:** An active Salesforce account is required to use this option.

2d. Use **Email account** provides a web-based authentication solution for sites where security profiles and other considerations make other login options impossible. A user account must be created before a login can proceed.

When prompted, enter your OnEsna username and password. Click **Login**.

If prompted to grant iLink Pro permissions, click **Accept**.

![Email account login](image)

See your information and privacy policies.
2e. **Choose UC credentials**, then enter the voice server name. Login using your alphanumeric username and password from Avaya Officelinx.

3. Click **Connect** when ready. To login with different credentials, click **Change account**.

4. The application has been installed. The icon will be gray when the program is not running, and it will be in color after log in.

5. Click the iLink Pro icon or the slider to launch the program.

**Note:** The slider is an option that is enabled from the **Settings > Options** page. Enable the **Embed to all opened pages** item. The panel displayed when clicking on the slider is independent of the panel that is opened from the icon; each can be used to display different information. Once this setting has been changed, close and relaunch the browser.
The Main Screen

This is the starting point for all interactions within iLink Pro. Clicking on an area of the window will open up additional possibilities.

Click on a part of the image, or select an item from the following list.

- Searching for Contacts
- Presence Management
- Favorites
- Groups
- Menu Options

From any location within the program, clicking the icon (upper right corner) will return you to the main page.

Many pages include a Previous icon that will return you to the previously viewed page.

Note: The Main Screen displays all of the contacts that are currently assigned to the group Favorites. Create other groups, or use the Search bar to find the person you need.

Incoming Notification

Whenever a message or telephone call has been received, a red light will flash in the menu bar to alert the user.
Searching for Contacts

The search bar appears throughout the application just below the presence bar. Use this field to look through the contact database to find the person you want to connect with. The results of a search will displace the current screen.

To search your personal contacts list, the company directory, and your Google contacts, type the mailbox number, extension, email address, or the contact's first or last name into the **Search or dial** field.

A search for **John** will find:
- **John Carter**
- **Brian Johnson**
- **it.guys@imjohn.com**.

All contacts that match the entered parameters are displayed. Click on a contact to view their details.

Click **X** to clear the search parameters and return to the previous page.

Call the Contact

Click the Call icon 📞 to place a telephone call to the contact. The number dialed is the number the contact has associated with their current location. For example, if their presence is set to “Out of Office,” their cell phone will be dialed, but if they are “In Office,” then their extension will be called instead.

The device configured for your own current location will ring to place the call.
Contact Options

Click on the button beside a contact to view the **Actions** menu for the contact. Select the appropriate feature. Refer to the section **Action Items** for details on all of these options.
Presence Management

The bar across the top throughout the application displays your current location, availability and default telephone device. Clicking on this area also allows you to modify your status. Share with everyone in your contacts list your location and whether or not you are free.

There are several programmed options for location, and you can create your own using the Web Client. Click Manage Locations to create and modify the settings on your locations. Click in the presence bar at the top of any page.

Locations

This tab shows your current location, availability status, and the number where you can be reached.

The locations, default availability, and the numbers where you can be reached at each location are automatically adjusted based upon the settings for each item established through Web Access. Your presence is also synchronized with your calendar and will be updated automatically.

A similar display appears beside each contact. Click on the pane to change these settings.

Locations

The most common locations have already been added to iLink Pro. Customized locations can be added, and the pre-programmed locations can be modified using the Web Access (click here for more details).

Location provides a quick description of where you are. The default availability configured for each location is also displayed here.

Click the location you want to use. This will override your calendar setting. The built-in locations are:

- In office
- Meeting
- Away on Business
- At home
- At lunch
- Vacation
- Extended Absence
- Temporary
- Mobile
- Remote office

Hint: Your presence is synchronized with your calendar. If you have a meeting scheduled for a specific time, iLink Pro will update your presence automatically. When the meeting is set to start, your location will be changed to Meeting and your availability will be set to Unavailable. When the meeting is scheduled to end, your presence will be returned to its default.
Availability

☑️ Available: Enabled by default, click this icon to show other users that you are able to take calls and join chat sessions. While available, your location icon will be green.

☐️ Unavailable: Enable this option to show others that you are not to be disturbed at the moment, and that they should try again later. Any incoming calls will be routed according to the rules defined using Web Access (e.g. transfer to voicemail or send to operator). When you are set to be unavailable, your location icon will be red.

On the phone: When you place a call or answer an incoming call, your availability icon will turn yellow to show others that you are On a call. Once the call has ended, your availability will return to its previous state.

People who are offline have their icon shaded gray. The location displayed is their last known location.

Only one of these options can be enabled at one time.

Schedule

Whenever you manually change your presence, you can specify the duration that the changes are to be maintained. After the stated period, your presence will revert to its previous setting.

Follow calendar: Set this item to have your presence synchronized with your calendar. This is the default setting.

Until next scheduled: Enable this option to keep the current custom settings until the next event scheduled in the calendar. At that point, Presence will again follow the calendar.

Interval: Select this option to be prompted to enter the length of time to keep the custom settings. Once this duration has passed, Presence will again follow the calendar. Choose an item from the Set interval menu.

Advanced

Manage locations: Use this option to launch the Web Access program in a web browser. Web Access allows you to create custom locations, and to set the default telephone numbers for each one. You can also configure what happens to an incoming call when you are unavailable. Click here for more information on Web Access.

Extensions

This tab allows you to set the number where you can be reached. This setting will override your calendar. The available numbers are setup using Web Access.

Extensions

Any extensions configured for making calls are shown here. Select the extension to use to receive incoming calls. The chosen telephone set will ring when a call is received.

Dial using

When you place an outgoing telephone call, the number chosen here will be the one used to make the call. The telephone set may ring, and you will be connected once you answer.
Manage labels

Use this menu item to give the device a descriptive name. For each telephone number and extension listed, you can enter a new name to use when displaying that set.

Device labels

<table>
<thead>
<tr>
<th>2345</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type a new name here...</td>
</tr>
<tr>
<td>6345</td>
</tr>
<tr>
<td>or here...</td>
</tr>
<tr>
<td>+1 6050553312</td>
</tr>
<tr>
<td>here...</td>
</tr>
<tr>
<td>+1 6050766700</td>
</tr>
<tr>
<td>You get the idea</td>
</tr>
</tbody>
</table>

Ok  Cancel
Favorites

This screen is the starting point for all interactions within the application and shows all of the contacts in your Favorites group. Contacts can also appear in other groups, or use the Search field to look through the entire database.

Each contact record contains 3 tabs. Click on the appropriate portion of the window to open that tab.

Messages

The Messages tab contains the Timeline for the person, which are events related to the contact you have chosen to display. Text chat sessions are also displayed here, with the space to enter outgoing messages at the bottom of the window.

Timeline

The Timeline is the accumulation of all Alerts configured for contacts within the application. Only Alerts that apply to the selected contact are shown here.

A time stamp appears above the event.

Click here for more information on configuring Alerts.
Chat

To send a text chat message to the contact, type your message in the space provided at the bottom of the screen and click **Send**.

All messages in the conversation appear in the window above the text entry box, with the most recent messages appearing at the bottom, scrolling up as new messages are received. Timeline entries will be scrolled upwards as well.

Your outgoing messages appear with your profile picture on the right. Incoming messages show the contact’s picture to the left.

The contact will see a flag on the extension icon in the browser address bar, and a light will flash within the extension to alert the user of the incoming message.

Call

The **Call** tab is used to initiate a telephone conversation with the contact.

**Note:** You do not need to enter any additional digits to reach an outside line (where applicable) as this has already been configured through the PBX.
Actions

Use the Actions tab to interact with the contact in other ways. Not all options are available for all contacts.
Some of these options require additional licensing, so contact your administrator for details.
Click here for a complete description for all of these options.
Large lists of contacts can make it difficult to find the one that you need. Organize contacts into logical **Groups** to make finding them easier.

From the Groups tab you can create, delete and rename groups, as well as control the membership of each. Each person can be added to more than one group. Each group that you create, and the members it contains, are specific to your account and will be the same when you connect through any device. The Officelinx database is not affected by these changes.

The **Favorites** group is created automatically by the application and cannot be deleted or renamed.

**Add group**

Select **Add group** to create a new collection for contacts. Give the group a name, then click **OK** to create the group.

Once a group has been created, you can add contacts through the **Manage group members** option within the group.

**Members**

Click on any group to view the list of people it contains. Selecting a contact will open their details page where you can view their timeline or begin a chat session. You can also place a call through your default device by clicking the telephone icon.
Edit Group

With a group opened, use the Edit Group icon to change the name of the group, or to remove it from the application.

- Enter a new Group name and click OK to confirm the change.

- Click Delete this group to permanently remove the collection from the program. Click OK to confirm this action. All members of the collection will be removed from your subscribed list but will remain in the database.

Manage Group Members

Click the Manage members button to see all contacts who have been placed into this group.

- Add new members to the group using the Search people field. When the person has been located, click the Add icon to the right of the person’s name to add them to the group.

- Click the trash can to the right of the contact’s name to remove them from the current group. Their status in other groups is not affected.
Actions

Under the **Group Actions** tab, you can connect with all members of the chosen group through the selected channel. Click [here](#) for a complete description for all of these options.

Directory

Open the **Directory** tab to view the company phone book defined on the Officelinx server. The groups created there, and the contacts they contain, are displayed.
Menu

The Menu button at the top of the screen provides instant access to your chat and telephone archives. It also houses the program configuration items so you can customize your experience.
Use the options under **Settings** to configure the program to work the way that you do. Specify the 3rd party programs that you want iLink Pro to be integrated with, and configure the various notifications that keep you up-to-date with those around you.

**Options**

Configure your Options to have the application work the way you do. Each item on this list toggles on / off.

All of these settings are optional. Although none are required, some are enabled by default.

**Phone recognition**

These settings control any additional numbers that are added to a outgoing dialed number.

- The administrator will configure the values for **Area code** and **Country code** on the server, and those values will be displayed here. You should only change these settings if you are out of the office and require different local dialing rules at your location.
- **Always show all matches** changes the manner in which search results are displayed. When enabled, the program will show all matches to a search, with multiple versions of the phone number parsed using the local dialing rules (e.g. enter 7079700, results are +1(905)707-9700 or 90 5 707 9700). When disabled, the phone number will not be parsed and will be shown and dialed precisely the way it was entered (e.g. 7079700).

**Integration**

**Integration** controls how iLink Pro interacts with your other applications.

- **Enable Google calendar** to allow iLink Pro to update your presence using the entries in your calendar. For example, if a meeting is scheduled in Google Calendar, your presence in iLink Pro will be changed automatically to **Meeting, Unavailable** at the correct time to reflect your status. After the meeting, it will be returned to the default value.

- **When Google Hangouts** is enabled, the presence bar will be updated whenever you join or leave a Hangout.

- **Embed to all opened pages** will add the iLink Pro slider to the browser window to make accessing the extension much easier. Reboot the browser after setting this option to complete the change.
Tutorials

Turn on Show all tutorials to enable the in-program pop-ups that will help guide you through the application.

Alerts

This menu allows you to define how and when the program provides notifications regarding your contacts.

Sounds

Choose whether or not the application will play a sound when an alert is generated.

- Enable Use sounds to play a sound effect when a notifiable event occurs. If this item is turned off, only on-screen prompts will be used for notifications.
- Silent if unavailable will mute all sound effects configured for alerts if your presence is set to Unavailable. This prevents your meetings from being disturbed.
Notifications

Specify when the application alerts you to changes with your contacts. Whenever a contact's status changes, a pop-up alert in the Windows desktop will be generated.

A notification may be triggered when the following occur:

- **Online status change** - the contact logs into or logs off from iLink Pro.
- **Availability change** - an online contact becomes available / unavailable / away.
- **Incoming chat** - generates an alert whenever someone else wants to start a text chat session with you.
- **Active call** - an alert is generated when a contact starts or ends a telephone call.

Timeline options

Configure these options to filter the alerts generated in the Timeline for each contact.

A Timeline event may be triggered when the following occur:

- **Online status change** - the contact logs into or logs off from iLink Pro.
- **Location change** - an online contact changes their location (i.e. from **In office** to **Meeting**).
- **Phone status change** - adds to the Timeline whenever a contact answers their phone or hangs up after the call.
- **Calls** - a Timeline entry is generated whenever you start or end a telephone call.
Logout

This item will terminate all functions and disconnect you from the program. You will be returned to the login screen. Other users of the system will see you as **Offline**.

Click **Connect** to relaunch the program.

Conversations

**Conversations** provides an archive of any text chat sessions you have had. A new chat session can be launched from here as well.

Start Conversation

The **Start conversation** button is used to create a new chat session. You will be asked to select a contact to invite. Enter a contact name or extension into the search bar and click next to the correct individual from the list returned.

Click **OK** to start the chat session. The person that you invited will receive a notification through iLink Pro that they are requested to attend.
The Phone tab contains the history of your Active and Recent telephone calls. The Dialpad allows you to manually dial a call from the computer.

Active Calls

This tab displays all ongoing (Active) telephone conversations. Click on a listed call to view Call Controls.

Recent Calls

The specifics for Recent telephone calls are kept here. The details of the call are shown.

Dialpad

Use the Dialpad to place a telephone call to any number or extension. Use the mouse to click the keys, or enter the numbers through the computer keyboard. When ready, click Dial to place the call through the currently selected telephone device.
A document that is stored on Google Drive and shared with other people can be used to start a meeting. The document must be open on your computer (e.g. in Google Docs), not viewed directly from the drive, before it will appear under the Collaboration tab.

Click the document to review the list of people that it has been shared with, and to start a WebEx meeting, a Google Hangout, or a conference call with the entire group. You can also review the locations of each contact on the list through Google Maps.

Click Members to see a list of all of the people the document is shared with. Click on one of the Collaboration Action options to start the selected event. All contacts with whom the document has been shared will receive an invitation through iLink Pro (for Chat and Google Hangouts), or through an email (for WebEx).

Click here to see an explanation for all action items.
Call Controls

Call Controls are available whenever a call is made through the iLink Pro dialer, or from the keypad of the device.

From the telephone, the **Hold**, **Mute** and **Hangup** functions are supported. When present on the device, the **Speakerphone** is also available and is controlled from the set.

The keypad within iLink Pro also supports call transfers during a call.

- **Put on hold** will pause the call, muting the microphone and allowing another call to be placed.
- When **Transfer** is selected, the current call is put on hold. Place a second call to another contact.

When the second number called begins to ring, click **Complete transfer** to send the call to that number.

- **Mute audio** will stop the outgoing audio stream until this item is pressed again. This prevents local conversations from being broadcast to all listeners.

- Click **Dialpad** to bring up a number pad which will allow you to enter additional keystrokes for the call. If you need to enter a security code or a mailbox number, use the Keypad.

- When sending a call to another number, click **Complete Transfer** to forward the call once the second number starts to ring.

- Use **Cancel Transfer** to terminate a call to a new contact before they answer.

- Click **Hangup** to end the call.

You can navigate away from the **Call** window without interrupting the call.
Click-to-Dial

On web pages that contain telephone numbers, Avaya iLink Pro will identify them and place a click-to-dial icon beside each one.

Click the icon to place a call to that number through iLink Pro.

+1 905 707 9700
## Action Items

At various places throughout the app you can create a new connection with the contact or group being viewed. Not all of these channels may be available. Contact your administrator for details.

**Note:** Some of these communications channels require additional licensing. Contact your reseller for details.

The available contact methods are:

<table>
<thead>
<tr>
<th>WebEx</th>
<th>Hangout</th>
<th>Conference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show on a map</td>
<td>Share location</td>
<td>Share document</td>
</tr>
<tr>
<td>Share web page</td>
<td>Clear history</td>
<td>Groups</td>
</tr>
</tbody>
</table>
Cisco's WebEx and Google's Hangouts are applications that can be used to setup larger meetings, and can include desktop and program sharing, whiteboards, and audio / video conferencing. Both applications may require additional licensing, extensions or plug-ins to be installed.

**Note:** The Avaya iLink for WebEx application must also be installed if WebEx meeting support is required.

Launch a WebEx meeting or a Google Hangout in a browser window. When you start an event, the viewed individual, all members of the group or the collaboration project automatically receive an invitation to attend. More people can be added before the event starts, or after it has begun.

If there is a chat session currently in-progress, it will continue during the event.

1. **Select WebEx or Hangout.**

   **Note:** Where appropriate, the necessary licenses for each program must be purchased separately.

2. For the person who started the WebEx meeting or Google Hangout, Avaya iLink Pro will automatically launch the chosen application to host the meeting.

**For WebEx:**

The **iLink for WebEx Instant Meeting** window appears which allows you to setup the meeting parameters (i.e. password access) and add additional participants. The selected contact is already included as an attendee. Click **Create meeting now** to launch the WebEx meeting in a browser and send each attendee an invitation through both their iLink Pro chat window and email. The invitation includes a link to join the meeting.
For Google Hangouts:

Google Hangouts will launch in the browser window. Click **Join** to start the meeting. The contact will receive an invitation in the chat window of iLink Pro. The invitation includes a link to join the meeting.

**Hint:** Refer to the WebEx or Hangout documentation for details on available features for these applications.

Conference

Clicking on the **Conference** button will place a telephone call to the contact. If activated from within a group or a collaboration project, all contacts in the collection will be bridged together into a single telephone conference call.

The **hold**, **call transfer** and **hangup** call controls are available within iLink Pro while on the conference call. The full range of WeLink Conferencing controls are available through the telephone. Refer to the WeLink Conferencing manual for complete details.

**Note:** The Conference feature requires the WeLink Conferencing server to be installed at your site. Contact your vendor for purchasing and licensing details.
Show on a map

Use **Show on a map** to display this contact’s location using Google Maps.

When used with more than one contact (e.g. Groups), the map will show all of those people on the map.
Share location 📍

Select this item to send a Google Maps image through **Chat** that shows your location.

Click **I’m at** above the map to open Google Maps in a browser with a larger version of the map displayed.
Share document

Use this option to share a document with the contact. The document must be stored on Google Drive, and you must have it open in the browser before it will appear in the list to share.

Once shared, the contact or the group will receive a link in their chat window that will take them to the document. The contact(s) will also be added to the list of people authorized to view the document.

Click the document to share to send a link to the document to the contact(s).

Share web page

The Share web page item will display a list of all pages open in the browser (Chrome or IE, depending upon which one is running Avaya iLink Pro). Click on the desired page to send the contact or group a link to that site in the chat window.
Clear history ☑

This item will remove all stored entries for this contact. These include records of chat sessions, timeline entries, and telephone conversations.

Groups 🗝

Groups are collections of related contacts that are created by the user as required. The Groups button allows you to assign the contact to an existing collection. Groups are managed through the Groups tab here.

Place a checkmark in the box beside the group(s) you want to add the contact to.

Note: The Favorites group is embedded in the application and cannot be renamed or deleted. People added to Favorites appear on the main page of Avaya iLink Pro.
Salesforce Integration

iLink Pro can be integration with both Salesforce Classic and the new Lightning user interface. The connection procedure is different for each integration. Refer to the appropriate section for you site requirements.

Salesforce Classic Integration

Avaya iLink Pro can be installed as a plug-in to the Salesforce CRM program. This provides users with contact, presence, and call management functions directly within Salesforce.

**Note:** Avaya iLink Pro provides support for both the Salesforce Classic view and the Lightning user interface. This section is for users of the Salesforce Classic interface.

**Caution:** Salesforce and Avaya iLink Pro must both be installed and operating correctly before proceeding.

Call Center Definition File

The following file will be imported into Salesforce to setup the integration. Use any text editor (e.g. Notepad) to create the file. When ready, save it in the XML format.

**Hint:** Copy the text and paste it into Notepad, then save it with the TXT format. Then, in Windows, rename the file, replacing the TXT extension with XML. For example, rename `FILENAME.TXT` to `FILENAME.XML`.

```xml
<callCenter>
  <section sortOrder="0" name="reqGeneralInfo" label="General Information">
    <item sortOrder="0" name="reqInternalName" label="Internal Name">iLinkCTI110</item>
    <item sortOrder="1" name="reqDisplayName" label="Display Name">iLink Call Center Adapter v.11.0</item>
    <item sortOrder="2" name="reqAdapterUrl" label="CTI Adapter URL">https://manage1.esna.com/sfcti/cti.bridge.v2.html</item>
    <item sortOrder="3" name="reqUseApi" label="Use CTI API">true</item>
    <item sortOrder="4" name="reqSoftphoneHeight" label="Softphone Height">500</item>
    <item sortOrder="5" name="reqSoftphoneWidth" label="Softphone Width">250</item>
    <item sortOrder="6" name="reqSalesforceCompatibilityMode" label="Salesforce Compatibility Mode">Classic_and_Lightning</item>
  </section>
  <section sortOrder="1" name="reqDialingOptions" label="Dialing Options">
    <item sortOrder="0" name="reqOutsidePrefix" label="Outside Prefix"></item>
    <item sortOrder="1" name="reqLongDistPrefix" label="Long Distance Prefix"></item>
    <item sortOrder="2" name="reqInternationalPrefix" label="International Prefix"></item>
  </section>
  <section sortOrder="2" name="CallResults" label="Call Results">
    <item sortOrder="0" name="Results" label="Result codes (comma separated list)"></item>
  </section>
  <section sortOrder="3" name="Matching" label="Phone matching options">
    <item sortOrder="0" name="SearchTemplates" label="Search templates (comma separated list)"></item>
    <item sortOrder="1" name="FormatTemplates" label="Format templates (comma separated list)"></item>
  </section>
  <section sortOrder="4" name="Experimental" label="Experimental options">
    <item sortOrder="0" name="ActivitySubtype" label="Apply activity subtype"></item>
  </section>
</callCenter>

Note: Avaya iLink Pro provides support for both the Salesforce Classic view and the Lightning user interface. This section is for users of the Salesforce Classic interface.

Caution: Salesforce and Avaya iLink Pro must both be installed and operating correctly before proceeding.

Hint: Copy the text and paste it into Notepad, then save it with the TXT format. Then, in Windows, rename the file, replacing the TXT extension with XML. For example, rename `FILENAME.TXT` to `FILENAME.XML`.
Open CTI Integration

Note: By default, Chrome and IE will block pop-ups while browsing. Avaya iLink Pro, when used as a plug-in with Salesforce, requires pop-ups to access advanced searches to identify incoming callers and access records. To ensure complete functionality, enable pop-ups when using the Salesforce plug-in.

Adding the Avaya iLink Pro plug-in to Salesforce requires the server to be configured for OpenCTI integration. This configuration is performed by the administrator before the plug-in will work correctly for clients.

Follow these steps to ensure the proper integration of Salesforce with Avaya iLink Pro.

Warning: OpenCTI integration with Avaya iLink Pro is only possible with Salesforce version 13+.

Warning: The required Call Center adapter for Salesforce is only available with the Enterprise edition and higher.

1. If you have not done so already, create the Call Center Definition XML File as outlined on page 109.
2. Login to Salesforce using an account with site administrator credentials.
3. Go to the Setup page.
4. Go to **App Setup > Customize > Call Center > Call Centers** and click **Continue**.

5. In the **All Call Centers** window, click **Import**.
6. Click **Choose File**, and select the **Call Center Definition** file created in step 1. With that file selected, click **Import**.

![Call Center Import](image1.png)

7. Returning to the **All Call Centers** window, choose the newly created Call Center and click **Edit**.

![All Call Centers](image2.png)
8. Click **Manage Call Center Users** to add clients to the new call center.

9. Click **Add More Users**.
10. Add all of the required users to the list. Once all of the users have been added, click **Add to Call Center**.

11. Integration is now complete. Once it becomes available, clients will need to go to the Chrome web store ([https://chrome.google.com/webstore](https://chrome.google.com/webstore)) to download the Avaya iLink Pro plug-in. Once that has been installed, you will have UC functionality available within Salesforce.
Using Salesforce

When using the Salesforce plug-in with iLink for Cisco, the interface works in the same fashion as it does when installed into a browser with the following additional integrations.

Inbound and Outbound Calling

When iLink for Cisco places or receives telephone calls, the program performs several functions within Salesforce to improve work flow. Instant access to contact records, and automatically creating activity log entries improves the usability of the plug-in.

Configuring Call Behavior

When receiving a telephone call, iLink for Cisco will extract the caller ID, if present, and pass this information to Salesforce. Settings made within Salesforce determine whether a pop-up is seen, if the matching client record is opened automatically, or if nothing at all occurs. This behavior can be changed by the administrator.

1. While logged into Salesforce using an administrator account, click Setup.

2. In the left-hand pane, go to Build > Customize > Call Center > SoftPhone Layouts.

3. Select a layout and click Edit.
4. Under the dropdown menu for **Select Call Type**, choose **Inbound**, **Outbound**, or **Internal**.

![Select Call Type](image)

5. Edit the settings to change the behavior of the program during a call. Please refer to the Salesforce documentation for more details on these options.

![Settings](image)

**On Inbound Calls**

Upon receiving a call, iLink for Cisco will read the caller ID information, if present, and will pass the details to Salesforce to handle according to the behaviors configured above.

**For Outgoing Calls**

When placing a call, iLink for Cisco does not open a contact record. When the number is clicked within Salesforce, iLink for Cisco will use that information to locate the contact record and add an activity report to the database with the call details.
Click-to-Dial

The Click-to-Dial feature is active within Salesforce. Any contact telephone numbers the plug-in finds will have the click-to-dial icon placed beside them for quick and easy dialing.

Calling from Chatter

From the Chatter tab within Salesforce, contacts that you are following are displayed. Moving the mouse over a contact's name pops up the Hovercard. If a telephone number is present on the Hovercard, the Click-to-Dial feature will be available for that number too. Click the program icon to place the call.
Creating a Filter

Salesforce provides the ability to collect similar items together for easier processing. To find all of the calls received from unknown contacts, build a filter that will search the database looking for the name “-” (hyphen), which iLink for Cisco adds as the default when receiving unidentifiable calls.

To create a filter:

1. Open Salesforce and go to the Contacts tab.
2. Click Create New View.

3. Give the filter a name. Choose to search all contacts.

   Set **First Name equals** the hyphen character `-`.

   The remaining fields can be left at their default values.
4. Click **Save**.

Run the filter when necessary to see a list of all calls received from contacts whose details could not be matched with an entry in the database.
Salesforce Lightning Integration

Avaya iLink Pro can be installed as a plug-in to the Salesforce CRM program. This provides users with contact, presence, and call management functions directly within Salesforce.

**Note:** Avaya iLink Pro provides support for both the Salesforce Classic view and the Lightning user interface. This chapter is for users of the Salesforce Lightning interface.

**Caution:** Salesforce and Avaya iLink Pro must both be installed and operating correctly before proceeding.

Call Center Definition File

The following file must be imported into Salesforce to setup the integration. Use any text editor (e.g. Notepad) to create the file. When ready, save it in the XML format.

**Hint:** Copy the text and paste it into Notepad, then save it with the TXT format. Then, in Windows, rename the file, replacing the TXT extension with XML. For example, rename `FILENAME.TXT` to `FILENAME.XML`.

```xml
<callCenter>
  <section sortOrder="0" name="reqGeneralInfo" label="General Information">
    <item sortOrder="0" name="reqInternalName" label="InternalName">iLinkCTI110</item>
    <item sortOrder="1" name="reqDisplayName" label="Display Name">iLink Call Center Adapter v.11.0</item>
    <item sortOrder="2" name="reqAdapterUrl" label="CTI Adapter URL">https://manage1.esna.com/sfcti/cti.bridge.v2.html</item>
    <item sortOrder="3" name="reqUseApi" label="Use CTI API">true</item>
    <item sortOrder="4" name="reqSoftphoneHeight" label="Softphone Height">500</item>
    <item sortOrder="5" name="reqSoftphoneWidth" label="Softphone Width">250</item>
    <item sortOrder="6" name="reqSalesforceCompatibilityMode" label="Salesforce Compatibility Mode">Classic_and_Lightning</item>
  </section>
  <section sortOrder="1" name="reqDialingOptions" label="Dialing Options">
    <item sortOrder="0" name="reqOutsidePrefix" label="Outside Prefix"></item>
    <item sortOrder="1" name="reqLongDistPrefix" label="Long Distance Prefix"></item>
    <item sortOrder="2" name="reqInternationalPrefix" label="International Prefix"></item>
  </section>
  <section sortOrder="2" name="CallResults" label="Call Results">
    <item sortOrder="0" name="Results" label="Result codes (comma separated list)"></item>
  </section>
  <section sortOrder="3" name="Matching" label="Phone matching options">
    <item sortOrder="0" name="SearchTemplates" label="Search templates (comma separated list)"></item>
    <item sortOrder="1" name="FormatTemplates" label="Format templates (comma separated list)"></item>
  </section>
  <section sortOrder="4" name="Experimental" label="Experimental options">
    <item sortOrder="0" name="ActivitySubtype" label="Apply activity subtype"></item>
  </section>
</callCenter>
```
Open CTI Integration

**Note:** By default, Chrome and IE will block pop-ups while browsing. Avaya iLink Pro, when used as a plug-in with Salesforce, requires pop-ups to access advanced searches to identify incoming callers and access records. To ensure complete functionality, enable pop-ups when using the Salesforce plug-in.

Adding the Avaya iLink Pro plug-in to Salesforce requires the server to be configured for OpenCTI integration. This configuration is performed by the administrator before the plug-in will work correctly for clients.

Follow these steps to ensure the proper integration of Salesforce with Avaya iLink Pro.

**Warning:** OpenCTI integration with Avaya iLink Pro is only possible with Salesforce version 13+.

**Warning:** The required Call Center adapter for Salesforce is only available with the Enterprise edition and higher.

1. If you have not done so already, create the Call Center Definition XML File as outlined on page 120.
2. Login to Salesforce Lightning using an account with site administrator credentials.
3. Click the **Setup** icon, and choose **Setup Home** from the dropdown list.
4. Go to **Platform Tools > Feature Settings > Service > Call Center > Call Centers**. Click **Import**.
5. Click **Choose File**, and select the Call Center Definition file created in step 1. With that file selected, click **Import**.

6. Returning to the **All Call Centers** window, click the newly created Call Center.
7. Click **Manage Call Center Users** to add clients to the new call center.

8. Click **Add More Users**.
9. Add all of the required users to the list. When finished, click **Add to Call Center**.

10. Integration is complete.

Clients must now go to the Chrome web store (https://chrome.google.com/webstore) to download the Avaya iLink Pro plug-in. Once installed, the client will have UC functionality available within Salesforce.

**Using Salesforce**

When using the Salesforce plug-in with iLink Pro, the interface works in the same fashion as it does when installed into a browser with the following additional integrations.

**Inbound and Outbound Calling**

When iLink Pro places or receives telephone calls, the program performs several functions within Salesforce to improve work flow. Instant access to contact records, and automatically creating activity log entries improves the usability of the plug-in.
Configuring Call Behavior

When receiving a telephone call, iLink Pro will extract the caller ID, if present, and pass this information to Salesforce. Settings made within Salesforce determine whether a pop-up is seen, if the matching client record is opened automatically, or if nothing at all occurs. This behavior can be changed by the administrator.

1. Login to Salesforce Lightning using an account with site administrator credentials.
2. Click the Setup icon, and select Setup Home from the dropdown list.

3. Go to **Platform Tools > Feature Settings > Service > Call Center > SoftPhone Layouts**.

4. Select a layout and click **Edit**.
5. Under the dropdown menu for **Select Call Type**, choose **Inbound**, **Outbound**, or **Internal**.

6. Edit the settings to change the behavior of the program during a call. Please refer to the Salesforce documentation for more details on these options.

**On Inbound Calls**

Upon receiving a call, iLink Pro will read the caller ID information, if present, and will pass the details to Salesforce to handle according to the behaviors configured above.

**For Outgoing Calls**

When placing a call, iLink Pro does not open a contact record. When the number is clicked within Salesforce, iLink Pro will use that information to locate the contact record and add an activity report to the database with the call details.
Click-to-Dial 📞

The Click-to-Dial feature is active within Salesforce. Any contact telephone numbers the plug-in finds will have the click-to-dial icon 📞 placed beside them for quick and easy dialing.

Click the icon or the number to place a telephone call to that contact using your currently selected telephone device.

Calling from Chatter

From the Chatter tab within Salesforce, contacts that you are following are displayed. Moving the mouse over a contact's name pops up the Hovercard. If a telephone number is present on the Hovercard, the Click-to-Dial feature will be available for that number too. Click the program icon to place the call.
Creating a Filter

Salesforce provides the ability to collect similar items together for easier processing.

**Hint:** To find all of the calls received from unknown contacts, build a filter that will search the database looking for the name - (hyphen), which iLink Pro adds as the default when receiving unidentifiable calls.

To create a filter:

1. Open Salesforce and go to the **Contacts** tab.
2. Under the **List View Controls** icon, select **New**.
3. On the **New List View** window, give the filter a name. Select which people can access this filter. When ready, click **Save**.
4. Click **Add Filter**.

![Add Filter Image]

5. Choose **Show me All Contacts**.
   
   Set the **Field** and **Operator** entries to specify where to search and the logic to apply. Enter the string to search for in the **Value** field.
   
   Click **Done**.

![Filter Configuration Image]

6. Click **Save**. The filter will be created, and then applied to the contact list.

![Filtered Contact List Image]

Run the filter when necessary to see a list contacts specified. Click the current view name on the Contacts tab and select
a filter from those available.
In This Chapter:

132 Introduction
133 Installation
136 Logging In
140 Main Window
145 Call Manager
149 Main Menu
155 Locations
Introduction

iLink Pro Desktop is an all-in-one messaging and communication tool designed to aid the users with all aspects of communication. From eMail to phone calls, from text messaging to presence management, iLink Pro Desktop provides a one-stop solution where all methods of business communication can be conducted through a single, simple interface.

iLink Pro Desktop also offers seamless integration to vital business applications, such as Google Apps. Furthermore, iLink Pro Desktop for mobile devices is supported by most major mobile platforms (Google Android, Apple iPhone and iPad, and RIM Blackberry).

You can access your personal and company contacts, find anyone within the same company/organization, and initiate conversation with any of them through any means supported by iLink Pro Desktop.

iLink Pro Desktop supports the Mac OSX environments natively. While the feature sets are not identical to the Windows version of iLink Pro Desktop, the Mac version offers all of the vital components including Call Control and Chat. For a comprehensive list of features available on different platforms, refer to the chart below.

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**Note:** Mac OSX up to version 10.7 has been tested for compatibility with iLink Pro Desktop.

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Client Feature Comparison

<table>
<thead>
<tr>
<th>FEATURES</th>
<th>FOR MAC OSX</th>
<th>FOR MS WINDOWS</th>
<th>WEB BASED CLIENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Manager</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Chat</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Company Directory</td>
<td>YES</td>
<td>YES</td>
<td>Search Only</td>
</tr>
<tr>
<td>Contact Search</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Directory Search</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>UC Location Management</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Event &amp; Call Logs</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>Plug-ins</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>Outlook Plug-In</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

**Note:** If you require a cross platform solution, or if you’re using an operating system which is not supported by iLink Pro Desktop, should consider iLink Pro on page 67 as an alternative.

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Pre-requisites

Download and Install

Installing .Net Framework from Microsoft

Before you install iLink Pro Desktop, make sure that the .Net Framework installed on your computer is **2.0 SP1** or higher. The iLink Pro Desktop may crash if the version of .Net Framework is older than this, or if it is not installed on the computer.
Installation

1. In a Web Browser, go to the web addressable location for your UC Server (e.g. user.yourcompany.com).

   ![AVAYA Interface](image)

   1. Select **Software Downloads**.

2. Determine the location where the downloaded file will be saved. When ready, click **Save**.

3. When the download is complete, double-click the file to launch the installation program. When asked to confirm the running of the file, click **Run**.
5. The installation wizard will start. Click **Next** to continue.

![Installation wizard](image)

**Note:** If you have other programs running (e.g. email, anti virus, etc.), shut them down before continuing with the installation.

6. The installer will ask you to select the install folder.

![Select installation folder](image)

You may leave the value at its default, or click the **Browse** button to find the location.

Click **Next** to continue.

7. At the confirmation screen, click **Next** to begin the installation.

![Confirm installation](image)
8. The necessary files will be copied to the installation directory.

9. When the installation is complete, click **Close**.

iLink Pro Desktop is now installed on the computer.
Logging In

Simplified Interface

Authentication

There are several choices when it comes to connecting iLink Pro Desktop to the Officelinx server. From the dropdown menu, select from the following options:

**Automatic Sign-in:** This setting will pull the Company, Mailbox and Password information from the Windows login credentials.

**Automatic with alt credentials:** This setting is similar to the one above, but allows for the customization of the fields in the Authentication section. If the Windows credentials fail, iLink Pro Desktop will use the alternate values.

**Manual Sign-in:** This setting is used to manually enter the login information. Windows login credentials cannot be used with Manual Configuration.

**Single sign-on:** Select this option to login using Google Apps credentials (a Google account is required) or the Windows login details. Both require additional configuration in Officelinx. See page 138 for more details.

**Login:** Click on this button to log into iLink Pro Desktop.

**Exit:** Click on this button to exit the iLink Pro Desktop program.

If **Manual Sign-in** or **Automatic with alt credentials** was chosen, additional information is required before the program can login.

**Company:** Enter the company number as appropriate. This will usually be 1 unless the phone system is servicing multiple corporations.

**Mailbox:** Enter your Application User name.

**Password:** Enter your password.

**Hint:** Enable **Save password** so that the program will use the same credentials with each login.

Connection Settings

If you cannot log into iLink Pro Desktop, some additional settings may need to be changed through **More options**.

**Server:** Enter the Officelinx server address. This address may be a URL (e.g. user.server.com) or an IP address (e.g. 123.123.123.123).

**Port:** Enter the port number used by the Officelinx server for client application communications.

**Note:** If you cannot configure these fields properly, contact your system administrator for the correct values.
Login Failure

If a failure occurs during **Automatic Sign-in**, you will be returned to the login screen to specify additional parameters. You can change to use Manual Sign-In and enter the credentials yourself, or choose **Credentials Discovery**.

Credentials Discovery

This field allows you to use your Windows login information to directly log into the UC server. Your Windows login user ID can be tied to your UC mailbox so that you can log into the UC server using the same credentials. This feature is only be available if it has been setup by the system administrator.

**Default credentials**: Enable this checkbox to use the current Windows login information (the credentials used when logging into the current Windows session) to log into Officelinx.

**Windows user**: Enter the Windows login user name associated with the Officelinx mailbox.

**Domain**: Enter the domain that the user belongs to.

**Password**: Enter the password for the user.

Enable the **Save password** checkbox to have the system remember these credentials with every log in.

Errors

When logging in to iLink Pro Desktop, the system can respond with several error messages. Use this information to make corrections to the listed login credentials.
Single Sign-on

iLink Pro Desktop supports Single Sign-On. The same mechanism is used with Web Access and the Gmail sidebar gadget. Select one of the 3 authentication methods to login to iLink Pro Desktop.

**Note:** Enable the Stay signed in checkbox to have the browser remember your credentials. The browser will retain your details until you explicitly log out of the application. Leave this box unchecked to be prompted for your authentication method and login credentials each time the program is launched.

---

**UC Authentication**

Click the icon to select **UC Authentication**. Enter a company number, mailbox and password to login to the system.

- **Company:** Enter the company number that you belong to. This will usually be 1, unless there are multiple companies managed from the same UC Server.
- **Mailbox:** Enter your mailbox number (must be numeric).
- **Password:** Type in the mailbox password.

Click **Sign in** to launch the application.

**Google Apps Authentication**

To use **Google Authentication**, you must have a Google Apps account. Contact your administrator for your account details.

- **Email:** Enter the email address associated with the Google Apps account.
- **Password:** Type in the password for the Google Apps account.

Click **Sign in** to launch the application.

**Windows Authentication**

**Windows Authentication** uses the computer or network login credentials to provide access to the application.

- **User name:** Enter the domain and username for the corporate network separated by a backslash (i.e. `domainname\username`).
- **Password:** Type in the password for this account.

Click **Sign in** to launch the application.
Officelinx Configuration

Both Google and Windows login require additional preparation by the Officelinx administrator before they can be used.

**Warning:** The Google and Windows login routines cannot be used together. Each user account can be setup to use either procedure, but NOT both at the same time. The UC login is always available to all users.

1. On the UC Server, go to **OL Admin > Company > Mailbox Structure**. Double-click the user's mailbox to open the setup window.
2. Go to the **Advanced** tab.
3a. To use the **Google login**: in the **Domain Account Name** field, enter the email address associated with the user's Google Apps account (i.e. user@company.com). Click **Save**.

3b. To use the **Windows login**: in the **Domain Account Name** field, enter the company domain name, followed by a backslash \ and the Windows username (i.e. domain\username). Click **Save**.
Main Window

From the main iLink Pro Desktop window, use **Contacts**, **Groups**, or the **Search** function to find a contact to connect with.

Initiate a dialog with these contacts through any means common to the settings for both parties.

Presence settings can be managed from here as well.

Select a topic for more detailed information.

- **Contact Display on page 140**
- **Recent Activity on page 140**
- **Search on page 143**
- **Call Manager on page 145**
- **Dial-Out Extension on page 144**
- **Main Menu on page 149**
- **Locations on page 155**
- **Schedule on page 155**
- **Availability on page 156**
- **Extensions on page 156**

Contact Display

The screen shows the presence and location status for each contact listed. Their profile picture is also shown here.

The color bar to the left of the picture indicates availability (**available**, **unavailable**, **on the phone**).

Online and Offline status appears beside the contact name. If there is no entry, that person is online.

The contact's location (In Office, Meeting, etc.) is shown beneath the name.

Recent Activity

The iLink Pro Desktop displays all recent communications activity in the top portion of the main window. All recent conversations conducted through iPD are shown, whether incoming or outgoing. The number of items displayed is set in the General Settings menu.

For all phone conversations, clicking to the right of the contact opens a window allowing you to place a call or send a text message to that number or extension.
Groups

iLink Pro Desktop supports group organization, which is an easy and convenient tool for managing contacts. Create a group and add people from the company directory to keep track of their presence and availability. For individuals that are contacted frequently, add them to a group so they can be reached through phone, email, text messaging and Chat with a click of the mouse.

Note: Groups are linked to each mailbox and do not affect anyone else. Add or remove people from the local directory without affecting other people’s contacts or groups.

Initiate actions with a contact from a group in two ways.

The status panel pops up when the mouse pointer hovers over the contact (below on the left). This panel allows you to view the details of the contact’s status before initiating an action through the buttons. For information regarding the actions available on the panel, click on the responding buttons below.

The second method is accessed by clicking on the arrow to the right of the a contact. This opens a comprehensive menu, providing a range of actions for the chosen contact.

Note: Some of these actions are available for members of the organization even when they are not part of a group (e.g. through directory or search).

Add Group

To create a group, click on the button on the main menu, and enter the group name in the space provided.

With the group created, search for contacts, either through the search function or in the company directory. Click on the contact icon to bring up the following menu, and select a group for that individual. A contact can belong to more than one group.

There are many ways to start a conversation with the contacts in a group. Some options have additional menu items available depending on that contact’s configuration. Move the mouse over a contact and click the arrow to the right to access the extended menu. Some items provide an additional sub menu when moused over.

Phone Call

From the Phone Call menu, all of the numbers associated with the contact are listed (internal & external). Click on a number to initiate a telephone call to that person. Your desktop telephone will ring, and when answered, the call will be placed to the contact.

Call and Record

To record a conversation, begin the call using the Call and record option. When call is over, a voice message with the recording will be delivered to your inbox.
E-Mail ⌛

From the **E-Mail** menu, compose and send email messages to any address associated with the contact. Once an address is selected, the default email program on the computer will open a new message window, pre-addressed to the contact.

Text Messaging ☏

From the **Text Messaging** menu, compose and send text messages to any of the addresses or phone numbers associated with the contact. Once the target is selected, a text messaging window will open already aimed at the contact. Type a message and hit **Enter** to send.

Chat 📣

From the **Chat** menu, send instant text-only messages to the contact if they are online. Selecting this option will open a messaging window. Type a message and hit **Enter** to send. Any responses will appear in the same window.

**Note:** Text Messaging and Chat share a common interface. Select the appropriate contact/method at the top of the window. Enter outgoing messages in the bottom frame. Both sides of the conversation appear in the upper frame.

Remove Member ✗

To remove a contact from the group, select **Remove Member**. The contact will be removed from the group, but not from the system.

Notifications 🛡

Rather than relying on iPD’s main window to track contact status, there are Notification flags. Any combination of flags can be selected for each contact in a group.

- **Online/Offline:** A popup appears whenever the contact comes online / goes offline.
- **Phone:** User will be notified when the contact goes on the phone / gets off the phone.
- **Location:** This option sends a notification when the contact’s location changes.

When the contact changes status in any of the flagged areas, the notification window will open in the bottom, right-hand corner of the screen.

Move to Group 🚄

From the **Move to Group** menu, you will be able to move the selected contact to another group. This option is only available if you have more than one groups. To move a contact, simply select the new group you wish to associate the contact with from the available list.
Search

iLink Pro Desktop's built-in search engine allows the company directory, and a user's personal and public contacts to be scanned for a specific individual. There are a few rules that you should keep in mind when searching for a contact:

- **Note:** When searching for a name, type `First_Name"space"Last_Name` (e.g. John Carter) or `Last_Name,First_Name` (e.g. Carter,John).
- If the person has spaces in their first name, the `Last_Name,First_Name` format is recommended.

iLink Pro Desktop keeps a record of previous searches. While typing a search string, iPD will display recent matches, but the list may not display every hit in the database. For best results, press the **Enter key** after typing the search string.

You can initiate a conversation from the search results. Click on the icon located to the right of the search results to open up the interaction menu.

- **Note:** The options will vary depending upon the information available for the contact. If the contact only has an email address specified in the system, only the email/text message selection will appear.

- **Note:** For details on each of the individual interactions, refer to Call Manager on page 145.

Specifying Search Options

In larger databases, searching through all of the entries may take some time. Reduce the search time by specifying exactly where iLink Pro Desktop will look. However, since most contact information is stored on the server by default (including your private contacts on UC mailbox), it is best to leave this at **Server-side search**.

- **Server-side search:** iLink Pro Desktop will search for the contact in the server's contact and directory database.
- **Cached results and actions:** iLink Pro Desktop will search through stored results from previous searches and actions performed through iLink Pro Desktop.
Dial-Out Extension

iLink Pro Desktop allows you to change the source of outgoing calls. The numbers available are derived from the numbers associated with the current mailbox.

Alternately, select Custom and manually enter the source Type and Number/Extension in the spaces provided.

When initiating a call using an external number as the source, Officelinx will call the source number first. Once that call is answered, the server will dial the destination, and then link the two calls together.

This allows users to control calls with iLink Pro Desktop wherever they are located. In all cases, whichever external number is selected, the recipient will always see the number associated with the Officelinx server, which will usually be the number of the office. This permits a high level of privacy regardless of a caller's location.

When making long distance calls, this may be a cost efficient solution as well. Since most companies have much more competitive rates for long distance plans than a typical cellphone or household, having the UC server dial both parties will take advantage of the company's dialing plans, preventing the external number from accumulating long distance minutes.
Call Manager

iLink Pro Desktop is able to control phone calls through the Call Manager interface on the desktop. When receiving a call through a device that is integrated with the UC server, there will be a section added to the bottom of iLink Pro Desktop's Main Window. Whenever you hover the mouse over a call entry, additional call control actions will appear.

**Note:** The Call Manager may be accessed from a separate window. Refer to Settings on page 152 to configure the feature.

**Note:** The Call Manager may be enabled for outbound calls. Refer to Settings to configure the feature.

**Note:** You can control more than one phone call simultaneously via the Call Manager.

**Note:** Actions available during call control will vary depending on your site's settings.

From the Call Manager, the following options are available before answering a call.

- **Answer:** Pickup the call. Specify which device will be used to answer the call if more than one device is defined for the current location.
- **Answer and record:** Select this option to answer the call and begin recording the conversation right away.
- **Take Message:** Send the caller directly to voicemail.
- **Hold:** Places the call on hold.
- **Transfer:** Redirect the call to another extension.
- **Remove:** Select this option to remove the selected call from the Call Manager. This does not affect the phone call itself.

From the Call Manager, the following options are available after answering or during a call.

- **Hang Up:** End the current call.
- **Hold:** Places the call on hold.
- **Transfer:** Redirect the call to another extension.
- **Call Handoff:** Select this option to pass the call to another device.

**Note:** Call Handoff may not be available depending on mailbox configuration. Please consult your system administrator for more information.

- **Start Record:** Begin recording the current call.
- **Remove:** Select this option to remove the selected call from the Call Manager. This does not affect the phone call itself.

**Note:** Upon receiving an incoming fax (iLink must answer the call to identify it as a fax), the pop-up will display different information. The call is now identified as a fax message, the receive status of the transmission is displayed, and the option to answer the call is removed.

Answering the call before the iLink picks up will interrupt this process.
Buttons / Icons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Incoming Call</strong>: This icon represents an incoming call.</td>
</tr>
<tr>
<td></td>
<td><strong>Answered Call</strong>: An answered call that is currently ongoing.</td>
</tr>
<tr>
<td></td>
<td><strong>Finished Call</strong>: A completed call or a Hang up.</td>
</tr>
<tr>
<td></td>
<td><strong>Answer</strong>: Click this button to answer an incoming call. The device that answers the call can also be selected.</td>
</tr>
<tr>
<td></td>
<td><strong>Answer and Record</strong>: Click this button to answer the call and begin recording the conversation right away. The device that answers the call can also be selected.</td>
</tr>
<tr>
<td></td>
<td><strong>Take Message</strong>: Send the caller directly to voicemail.</td>
</tr>
<tr>
<td></td>
<td><strong>Hold</strong>: Places the call on hold.</td>
</tr>
<tr>
<td></td>
<td><strong>Remove</strong>: Click on this button to remove the selected call from the Call Manager. This does not affect the phone call itself.</td>
</tr>
<tr>
<td></td>
<td><strong>Start Record</strong>: Click on this button to begin recording a call already in progress.</td>
</tr>
<tr>
<td></td>
<td><strong>Pause Record</strong>: Click on this button to temporarily stop recording. Click again to resume.</td>
</tr>
<tr>
<td></td>
<td><strong>Stop Record</strong>: Click on this button to stop the recording. The recorded conversation will be arrive as a new voicemail.</td>
</tr>
<tr>
<td></td>
<td><strong>Transfer</strong>: Click on this button to redirect the call to another extension or device.</td>
</tr>
<tr>
<td></td>
<td><strong>Call Handoff</strong>: Click on this button to pass the call to another device seamlessly.</td>
</tr>
<tr>
<td></td>
<td><strong>Call Back</strong>: Click on this button to return the call.</td>
</tr>
</tbody>
</table>

Hold 📞

When receiving a call, or after answering a call, that call can be put on hold. When a call is on hold, there are the following options.

- **Stop Hold**: Select this option to end the hold and re-initiate the conversation or let the call ring again.
- **Transfer to...**: Select this option to transfer the call on hold to another location. Refer to Transfer on page 147 for more details.
- **Transfer to #**: Select this option to transfer the call to one of the other numbers associated with your mailbox.
Transfer

With the Call Manager, a call can be transferred to either a number predefined by the mailbox account, or a manually defined location.

Transfer to...

Transfer to... allows a call to be transferred to a user defined location. This location can be a Mailbox, Phone Number or a presence Location.

Mailbox

With the Mailbox option, browse for the destination mailbox by clicking on the Find button in the Transfer to... window. Search for the target by the name associated with the mailbox or the mailbox number.

Phone

If choosing the Phone option, define the destination phone number by clicking on the Build button. After selecting the type of phone number (internal extension or an external number) fill in the boxes with the necessary information, then click OK.

Location

Specifying the Location option requires the user to select a pre-define location from the drop down menu. The call will be transferred to the default number associated with the chosen location.

Record

When recording a call, the Call Manager menu changes. The user can pause and resume recording during the call. When recording is stopped, or when the call ends, the recorded conversation will be sent to the user’s mailbox as a voice message.

Continue Record: Resumes recording. This option is only available when recording is paused.
Pause Record: Pause recording. Click it again to Continue recording at any time.
Stop Record: Select this option to stop the recording. When this option is chosen, the recording will be sent to the user’s mailbox.
**Handoff**

**Call handoff** permits the seamless transfer of a call to another device (e.g. from a desktop extension to cellphone). Unlike typical transfers, call handoff will not prompt the caller for any action. When a handoff is started, the target device will ring. When answered, the previous device will be disconnected and the call will be immediately routed to the new device. A call may be handed-off multiple times as long as Call Manager is available.

**Note:** Call Handoff may not be available depending on mailbox configuration. Consult the system administrator for more information.

### Transfer to...

The **Transfer to...** option allows a call to be passed to a manually defined location. This location can be a Mailbox, Phone Number or from a presence Location.

#### Mailbox

With the Mailbox option, browse for the destination mailbox by clicking on the **Find** button in the **Transfer to...** window. Search for the target by the name associated with the mailbox or the mailbox number.

#### Phone

If choosing the **Phone** option, define the destination phone number by clicking on the **Build** button. After selecting the type of phone number (internal extension or an external number) fill in the boxes with the necessary information, then click **OK**.

#### Location

Specifying the **Location** option requires the user to select a pre-define location from the drop down menu. The call will be passed to the default number associated with the chosen location.

### Separate Window

For users with a high volume of calls, the main window of iLink Pro Desktop may be inconvenient. In these situations, it is possible to open a separate Call Manager window so that all calls appear in a larger pane with oversized buttons for ease of operation. The behavior of the call controls is the same as in the integrated Call Manager window.
Main Menu

Access the main menu by clicking on the Link button.

**Note:** This menu is also accessible through a right-click of the Taskbar icon.

All personal settings may be managed from this menu. Presence and core iLink Pro Desktop configurations are available from here.

- **Set current location:** Change user location to one of the pre-defined options.
- **Add Group:** Create a new personal group.
- **Web client:** Launch Web Access and log-in automatically with the current credentials.
- **Chat:** Open a chat window to members of the organization who are online.
- **Company directory:** View the directory of the organization.
- **Call history:** Displays the past call details for the mailbox.
- **Event history:** Shows the events that have occurred at this mailbox.
- **Settings:** Provides access to the settings menu where most of the configurations are done.
- **Help:** Gives access to miscellaneous features and the help file.
- **Logout:** Sign off of iLink Pro Desktop.
- **Exit:** Select this option to log out and close the iLink Pro Desktop.

### Set Current Location

View and modify your current location details. Keep in mind that location can also be changed from the main iLink Pro Desktop window's shortcut icons.

To use the location currently define on your calendar, enable the **Use my locations calendar** radio button. To manually define a custom location, enable **Override my locations calendar**, then configure the fields as required.

- **Current Location:** Choose the current location from the dropdown menu.
- **Phone Number:** From the drop down menu, select the phone number to use for this location. The list of available numbers depends on the location currently chosen.
- **Availability:** From the dropdown menu, select availability for this location.
- **Appear unavailable if no caller ID:** Enable to appear unavailable if the system cannot detect a caller ID on an incoming call.
- **Override Availability Filters:** Enable this checkbox to have the availability specified here override any filters pre-configured for this location.

#### I will be at this location

Define the duration that the current location will be active.

- **Until I change my location:** The current location will be permanent until manually changed.
- **Until the next scheduled activity ...:** The current location will remain active until an event in the calendar changes it, or until the end of the current working day. The location will then revert to the calendar schedule.
- **Till:** Select this radio button to specify the exact time and date for the current location to expire. The location will revert to the calendar schedule at the selected time.
- **Edit my locations...:** Click on this button to open Web Access to directly manage locations.
Chat 🎨

Chat creates an instant messaging session with anyone that is currently online in the same UC system (e.g. those who are in the same company). Chat is an easy to use alternative to phone conversation when you wish to leave a short message or get in contact with someone while they are already on the phone.

Enter the name or the mailbox extension of the person you wish to contact.

To communicate through Chat, type the desired message in the text field at the bottom, then press **Enter**, or click the **Send** button.

**Save**: Click to save the Chat conversation as a text file. The **Save As** window will open to specify the location and the name of the file that is to be saved.

**Clear**: This will clear the conversation history for the current Chat window.

**Kind**: If the recipient of the message has an SMS address defined on their mailbox, there will be the option in this dropdown menu to select **Chat Only** or **Chat/SMS**. The Chat/SMS option will send a Chat message and copy the same message to the recipient's SMS address.

- During a conversation, you can immediately place a telephone call, email or text message to the party.

**Chat Broadcast 🎨**

**Chat Broadcast** will send a Chat message to everyone within your company that is currently logged into iLink Pro Desktop.

If a user replies to a Chat Broadcast message, a new Chat window will open for that **individual** user. This means that if there is a large user base, and everyone who receives the message replies to it, there will be a significant number of Chat windows opening simultaneously.

---

**Caution**: Remember that Chat Broadcast messages are instantly delivered to **everyone** currently logged in to the system. Careless use of this feature will flood all users with a stream of message pop-up windows.
Company Directory

The **Company directory** shows the other mailbox accounts associated with the current Company.

The company directory will usually be divided into departments to make finding a particular individual easier. Right-click a mailbox account to open the menu shown here.

This menu provides the standard options to initiate contact with the person or add them to your personal group.

History

Call History

**Call history** keeps track of all incoming, outgoing and missed calls. Click the telephone icon beside an entry to see detailed information for that call.

Call Information

Clicking on the phone icon for a call history entry shows the details of that call. If the entry is not a missed call, there will also be an entry for the duration of the call.

**Note:** If the Missed Call History is not cleared, the user will receive a notification for the event when logging into iLink Pro Desktop. Only the Missed Call History will be cleared when clicking the Clear History button while viewing missed calls.

Assuming that caller ID is available, the user will have the option to call back any contact in the call history.

Click the arrow icon to open a menu with the option to call the contact, or remove them from the history list. To clear the entire call history, click **Clear History** at the top of the window. This provides the option to clearing all incoming or outgoing message from the history.

Event History

The **Event History** keeps track of most actions performed within the iLink Pro Desktop. Any log-in sessions, outgoing and incoming conversations, and message notifications are all recorded in the event history. To view the details of an event, Event History will prove to be a valuable tool.

You may also organize Event History periodically by using the buttons available at the top.

- **Remove history record:** Delete the selected entry from the history.
- **Clear History:** Click to delete all entries in the history.
Use **Settings** to configure the core details of iLink Pro Desktop. Refer to the appropriate section to learn more about what each setting does.

**General on page 152**

**Call Manager on page 145**

**Events & Notifications on page 154**

**Sounds on page 154**

### General

**UI language:** From the dropdown menu, select the language the program interface should use.

**Allow Automatic sign in:** Enable this checkbox to automatically log into the iLink Pro Desktop when the program is launched. Select **Save password** at the login screen in order for this feature to function.

**Automatic reconnect:** Enable to automatically reconnect to the iLink Pro Desktop when being logged out through means other than deliberately action.

**Single messaging window:** Combines all Chat windows into a single, tabbed window, instead of one open window per contact.

**Secure Web:** Web Access will use HTTPS protocols instead of HTTP for secure communications.

**Number of recent items:** Specify the number of recent conversations to display in the main window.

- **Recent items on top** - Show any recent activity at the top of the window. When disabled, recent activity will appear beneath the contacts and groups displayed.
- **Remember chat destinations** - Include Chat conversations in the recent activity display.
- **Remember phone numbers** - Include telephone conversations in recent activity display.

**Change Password:** Click on this button to change the mailbox password.
Call Manager

**Separate Call Manager window**: Enable this checkbox to allow call manager to be accessible through a separate window.

**Automatically close when no remaining calls**: Automatically close the separate call manager window when all calls are finished.

**Record all incoming calls**: Make a recording of all incoming calls.

**Outbound call control**: Make the Call Manager available during outbound calls.

**Save dial-out extension**: Save the last used custom dial-out extension. The setting will be kept until it is changed.

**Call popup**: From the drop down menu, select the method of notification when receiving incoming calls.

- **Off**: Do no ask an incoming caller for their ID (number) if it is unrecognized by the system. Do not display it in a screen popup.
- **Ask**: Prompt an unidentified caller to enter their phone number on the telephone keypad.
- **Pop**: Display an incoming caller’s phone number.
- **Ask & Pop**: Ask an unrecognized caller to enter their phone number and display that number in a screen popup.

**Auto-search**: Enable this checkbox to automatically search for all documents on the computer related to the caller based upon their name and phone number. This feature requires Google Desktop or Microsoft Search / Microsoft Desktop Search.

**Auto-cleanup old calls (days)**: Enter the number of days that the call history will be kept.

**Default action**: From the dropdown menu, select the action that iLink Pro Desktop will automatically take when a call is received.

- **No Action**: The iLink Pro Desktop will not perform any action when a call comes in.
- **Take Call**: iPd will answer the call, regardless of the presence of the user.
- **Take message**: Automatically sends the caller to voicemail.
- **Transfer**: Forward the call to the destination defined in the Transfer To... window, accessed through the Set/Check button.

**Transfer is not selected as default action**: When Transfer is selected as the Default action, the Set/Check button will become active with additional choices available to specify the destination of the transfer.

- **Mailbox**: Select this radio button to forward the caller to another mailbox in the system. Click Find to search for the contact.
- **Phone**: Select this radio button to forward the caller to a specific phone number. Click Build to specify internal or external numbers and the necessary details (Country code, Area code, Phone number).
- **Location**: This will forward the caller according to the location settings defined for the current location.
Events & Notifications

**Disable sounds/notifications if unavailable:** Disables all sounds and notifications messages if the availability is Not Available.

**New message sounds from active chat window:**
Receive sound notification even when in an active Chat chat window.

**New message notification:** Receive a popup notification when a message (text, voice, fax) arrives in the mailbox.

**Record beep:** Plays the record beep when you barge-in. This feature notifies you when the barge-in is successful by playing the record beep file.

Sounds

**Turn sounds off:** Enable this checkbox to disable all sounds within iLink Pro Desktop.

**Connected:** Define the sound that will be played when you log into the iLink Pro Desktop.

**Disconnected:** Define the sound that will be played when you disconnect from the iLink Pro Desktop.

**Incoming Call:** Define the sound that will be played when you receive an incoming call.

**Receiving fax:** Define the sound that will be played when you receive an incoming fax.

**Record Started:** Define the sound that will be played when the call recording starts.

**Chat Message:** Define the sound that will be played when you receive a Chat message.

**New Message:** Define the sound that will be played when you receive a new message (text, voice, fax) in your mailbox.

**User Online:** Define the sound that will be played when a tracked user comes online.

Help

**About:** Select this option to view the version information regarding iLink Pro Desktop.

**Documentation:** Select this option to view the iLink Pro Desktop help file.

**Collaborate:** Select this option to start the collaborate service. This has to be configured by your system administrator in order to function properly. When configured, you will be automatically taken to the collaboration web site that your company uses.
Locations

Locations allow you to easily change your presence settings. Presence encompasses your current location, numbers where you can be reached, and whether or not you will be available while at that location. iLink Pro Desktop comes with a set of typical locations predefined, but you can add and modify your locations through Web Access by clicking on the Manage Locations option.

Note: The location may also be changed through the main menu Set Current Location option.

Normally, location will be managed through the locations calendar. There will also be times when it is necessary to manually alter location information temporarily: taking lunch a little later than usual, or being called into a meeting on short notice. The locations menu of iLink Pro Desktop gives presence flexibility.

To change current location, select the desired location from the menu. The location defined here will be used until the next scheduled event in the calendar. For example, if you are currently In Office at 12:05 PM and manually change location to At Lunch, your previously schedule meeting at 12:30 PM will change your location to Meeting at that time.

There is also the option to manually define the time period through the schedule feature. Once you use the schedule feature along with your locations, the next manual locations change that you make will follow the previous schedule that you have selected for your convenience.

Schedule

Schedule feature allows you to customize locations by modifying the time frame with the selected location. By default, the schedule will follow your locations calendar which can be configured through Web Access.

After selecting the desired location from the menu, select one of these options to define the time period for that location:

- **Follow locations calendar**: Ignore the manually selected location and use the one defined in the calendar.
- **Until next scheduled**: Keep the manually selected location setting until the next calendar event.
- **Until I change**: The location will not change again until it is again manually changed.
- **For next 5 minutes**: Stay at the current location for 5 minutes. The location will revert to the calendar afterwards.
- **For next 10 minutes**: Stay at the current location for 10 minutes. The location will revert to the calendar afterwards.
- **For next 15 minutes**: Stay at the current location for 15 minutes. The location will revert to the calendar afterwards.
- **For next 30 minutes**: Stay at the current location for 30 minutes. The location will revert to the calendar afterwards.
- **For next 1 hour**: Stay at the current location for 1 hour. The location will revert to the calendar afterwards.
- **For next 2 hours**: Stay at the current location for 2 hours. The location will revert to the calendar afterwards.
- **For next 4 hour**: Stay at the current location for 4 hours. The location will revert to the calendar afterwards.
- **Till tomorrow**: Keep the selected location for the remainder of the current day (until 12:00 AM). The location will revert to the calendar afterwards.
Availability

While availability is primarily controlled through locations, there is the option to define it manually. A manually chosen availability setting will override the settings associated with the current location.

**Available**: This option shows the user as available to everyone.

**Unavailable**: This option shows the user as unavailable to everyone.

**Appear unavailable if no caller ID**: Select this option to be shown as unavailable to callers that do not have Caller ID information (e.g. unknown or private numbers).

**Override availability filters**: Select this option to override any availability filters associated with the current location. When this option is on, the user will either be Available to everyone or Unavailable to everyone with no specific rules.

Extensions

If there are multiple extensions or phone numbers associated with a single location, the contact number can be selected from this menu. This will route callers through the selected number first, regardless of the preference configured in the location itself.

For example, if you have the Find Me/Follow Me configured, the UC server will try to locate you first through the selected number, then try other methods if there is no answer.
# WEB ACCESS

## In This Chapter:

<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>158</td>
<td>Introduction</td>
</tr>
<tr>
<td>159</td>
<td>Logging In</td>
</tr>
<tr>
<td>162</td>
<td>Logging Off</td>
</tr>
<tr>
<td>163</td>
<td>The Main Screen</td>
</tr>
<tr>
<td>164</td>
<td>Web Tutorial</td>
</tr>
<tr>
<td>165</td>
<td>Messaging</td>
</tr>
<tr>
<td>165</td>
<td>Send a Message</td>
</tr>
<tr>
<td>167</td>
<td>Send a Fax</td>
</tr>
<tr>
<td>168</td>
<td>Messages</td>
</tr>
<tr>
<td>173</td>
<td>Fax Jobs</td>
</tr>
<tr>
<td>174</td>
<td>Greetings</td>
</tr>
<tr>
<td>176</td>
<td>Message Forwarding</td>
</tr>
<tr>
<td>177</td>
<td>Location</td>
</tr>
<tr>
<td>178</td>
<td>Locations</td>
</tr>
<tr>
<td>177</td>
<td>Change Current Location</td>
</tr>
<tr>
<td>183</td>
<td>Calendar</td>
</tr>
<tr>
<td>186</td>
<td>Addresses</td>
</tr>
<tr>
<td>191</td>
<td>People</td>
</tr>
<tr>
<td>191</td>
<td>Contacts</td>
</tr>
<tr>
<td>196</td>
<td>Lists</td>
</tr>
<tr>
<td>198</td>
<td>Notification</td>
</tr>
<tr>
<td>198</td>
<td>Schedule</td>
</tr>
<tr>
<td>200</td>
<td>Options</td>
</tr>
<tr>
<td>201</td>
<td>Wakeup Call</td>
</tr>
<tr>
<td>202</td>
<td>Settings</td>
</tr>
<tr>
<td>202</td>
<td>Web Tutorial</td>
</tr>
<tr>
<td>202</td>
<td>Account</td>
</tr>
<tr>
<td>204</td>
<td>Call</td>
</tr>
<tr>
<td>206</td>
<td>Help</td>
</tr>
</tbody>
</table>
Web Access is a web-based application that gives each user on the system the ability to maintain all aspects of communication and personal schedules. No software is installed on the local computer. Connect to Web Access using any computer with a web browser and Internet access.

**Important:** All functions are available only to accounts with **Messaging and Collaboration** (Avaya Mainstream) Desktop Capabilities. An account with **Messaging** (Avaya Basic) alone will not have access to the messages or notifications tabs through Web Access. Desktop Capabilities are configured in OL Admin on the Advanced tab for each mailbox.

### Getting Started

**Warning:** It is necessary to setup your web browser to allow pop-ups for the company server site ([user.yourcompany.com](http://user.yourcompany.com)). If pop-ups are blocked for this site, not all functions will appear or may not work correctly.

In a web browser, enter the remotely accessible address of the Officelinx server. This is normally of the form [user.your_company.com](http://user.your_company.com). Select **Web Access** to reach the login page.

These links provide 4 authentication methods to open Web Access: **Google** needs a Google account setup, **Office 365** needs a Microsoft account, **Windows** will use your computer or network login details, and **UC** requires your UC Server credentials.
Click one and enter the required credentials to login.

The first time you connect to Web Access from a computer you will need to install some supporting software.
Go to the Software Downloads page. Download and run both the Java plugin (IE only) and the Grant Permission (all browsers) programs to setup your computer for the web client. These programs must be used on each workstation before the Web Access will be fully operational.
For example, you will not be able to use a PC microphone to record greetings unless the utilities have been installed.

Logging In

Web Access supports Single Sign-On, the same mechanism used with the iLink client apps: logging in to any of these programs seamlessly provides access to the others without another login.
Select one of the authentication methods to login to Web Access.

**Note:** For security purposes, after a reasonable period of inactivity, users will be automatically logged out of Web Access and returned to the login screen.

**Note:** Enable the Stay signed in checkbox at the bottom of the sign-in screen to have the browser remember your credentials. The browser will keep your details until you explicitly log out of the application. Leave this box unchecked to be prompted for your authentication method and login credentials each time the program is launched.
Google Authentication

To use **Google Authentication**, you must have a Google Apps account. Contact your administrator for your account details. To create a new account, click the Sign Up button in the upper right corner and proceed through the wizard before returning here.

Enter the required details in the spaces provided:

- **Email**: Enter the email address associated with the Google Apps account.
- **Password**: Type in the password for the Google Apps account.

Click the **Sign in** button at the bottom of the window to launch the application.

Office 365 Authentication

To use **Office 365 Authentication**, you must have a Microsoft account. Contact your administrator for your account details. To create a new account, click the Sign Up button in the upper right corner and proceed through the wizard before returning here.

Enter the required details in the spaces provided:

- **Email**: Enter the email address associated with the Google Apps account. Click **Next**.
- **Password**: Type in your password for Office 365, then click the **Sign in** button at the bottom of the window to launch the application.

Windows Authentication

**Windows Authentication** uses your computer or network login credentials to provide access to the application.

Enter the required details in the spaces provided:

- **User name**: Enter the domain and username for the corporate network separated by a backslash (i.e. `domain_name\user_name`).
- **Password**: Type in the password for this account.

Click the **Sign in** button at the bottom of the window to launch the application.
UC Authentication

Click the UC icon to select **UC Authentication**. Enter a company number, mailbox and password to login to the system.

Enter the required details in the spaces provided:

- **Company**: Enter the company number that you belong to. This will usually be 1, unless there are multiple companies managed from the same Voice Server.
- **Mailbox**: Enter your Application User name.
- **Password**: Type in your password.

Click the **Sign in** button at the bottom of the window to launch the application.

Officelinx Configuration

Both Google and Windows login require additional preparation by the Officelinx administrator before they can be used.

**Warning**: The Google and Windows login routines cannot be used together. Each user account can be setup to use either procedure, but NOT both at the same time. The UC login is always available to all users.

1. On the Officelinx voice server, go to **UC Admin > Company > Mailbox Structure**. Double-click the user’s mailbox to open the setup window.
2. Go to the **Advanced** tab. Do one of the following.
3a. To use the Google login: in the **Domain Account Name** field, enter the email address associated with the user’s Google Apps account (i.e. user@company.com).

   Click the **Save** icon in the toolbar at the top of the window.
3b. To use the **Windows login**: in the **Domain Account Name** field, enter the company domain name, followed by a backslash `\` and the person's Windows username (i.e. `domain\username`).

Click the **Save** icon in the toolbar at the top of the window.

---

**Logging Off**

When finished with a Web Access session, always log off to keep your data secure.

Click the **Log Off** button in the upper right-hand corner of the main screen.

Click **OK** when prompted to log out of Web Access, or **Cancel** to return to the program.
The Main Screen

The main screen of Web Access consists of five blocks of related options: **Messaging**, **Location**, **People**, **Notification** and **Settings**. Each block is divided into the main features available for that group. Click on an item to access additional options and controls.

Please refer to the corresponding sections of this document for complete details.

- Messaging on page 165
- Location on page 177
- People on page 191
- Notification on page 198
- Settings on page 202
Web Tutorial

The **Web Tutorial** button under **Settings** will guide you through setting up your mailbox for use through Web Access. Although your administrator has likely done this for you, this wizard will help familiarize you with the options available on the system. You will be able to make the necessary modifications to the system through this wizard. It is recommended that you run the wizard once before proceeding.

1. **Intro**: Select the time zone where you are located most often. Enter the time that you start and end each day. Click the **Next** button to continue.

2. **Phone Numbers**: This window allows you to enter the numbers where you can be reached. For each number, enter the extension(s), internal or external telephone numbers where you can be reached. Enter the complete number, including country and area codes where applicable, then click the **Next** button to continue.

3. **Locations**: Specify the telephone number or extension that the system should try first for incoming calls when your location is set to “In Office”. Also specify what action the system will take if there is no answer at that number.

   **Incoming calls will ring**: Enter the primary extension where you can be reached during office hours.

   **If there is no answer**: From the dropdown list, choose what action the system should take (e.g. “Take a Message”, call a different number) if there is no answer at your primary number. If you entered other phone numbers in step 2, those numbers will be available in the list. Click **Add+** to add another entry.

Tell the system whether or not it should contact you when you are at home. If you select **Yes**, enter the necessary contact numbers in the spaces provided. Click the **Finish** at the bottom of the window to complete the wizard.
Messaging

The **Messaging** block allows you manage all aspects of your email and fax communications. You can create new messages, read incoming messages, and listen to voice messages left on the system. No additional email client or software is required.

Your telephone greetings are also created and maintained in this section. This block includes sections for Send a Message, Send a Fax, Messages, Fax Jobs, Greetings and Message Forwarding.

Message Icons

These icons are used to display information about each message:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>📞</td>
<td>New Voice</td>
<td>Indicates that the message has an audio component (voice message or attachment)</td>
</tr>
<tr>
<td>📭</td>
<td>Unread Email</td>
<td>Indicates an email that you have <strong>not</strong> read</td>
</tr>
<tr>
<td>📥</td>
<td>Read Email</td>
<td>Indicates an email that you have <strong>read</strong></td>
</tr>
<tr>
<td>📥</td>
<td>Fax</td>
<td>Indicates that the message is a fax</td>
</tr>
<tr>
<td>🚨</td>
<td>Urgent</td>
<td>This message is marked Urgent by the sender</td>
</tr>
<tr>
<td>📦</td>
<td>Confidential</td>
<td>This message is marked Confidential by the sender</td>
</tr>
<tr>
<td>📦</td>
<td>Attachment</td>
<td>Indicates that this message includes an attachment</td>
</tr>
</tbody>
</table>

Send a Message

To create a new email message, click the **Send a Message** button.
Main Message

Composing a message is the same as with other email clients. Define the recipient(s), then enter the subject and body of the message. If required, attach a file using the **Attachments** tab.

**TO**: Enter the email address for the recipient in the TO field. Alternatively, use the search icon to open your contact list and select the contacts to include. Multiple addresses can be entered when separated by a comma (e.g. johnc@erbmusic.com, brianj@fxsound.ca).

Click the **Add CC** or **Add BCC** links to “carbon copy” or “blind copy” additional recipients of the message. These will open new address bars for each category. Enter the addresses in the spaces provided, or use search to select from your contacts list.

**Subject**: Type a brief description of the message contents so the recipients will know what it is about.

Enter the **body** of the message in the space provided.

Select additional options for the message from the dropdown menus above the message window:

- **Importance** - Choose between **Normal** and **Urgent**. Urgent shows the recipient that the message should be opened immediately.

- **Sensitivity** - Select either **Normal** or **Confidential** to tell recipients that the message contains sensitive information.

- **Mark Certified** - Enable this checkbox to request that the recipients send you an alert when they read the message.

Attachments

The Attachments tab in the New Message window is used to include additional items with an outgoing message. Use the **Add** button in the upper left to include a **File**, **New Text** or **New Voice** attachment with the message.

- **File** - Selecting this option opens a window where you can choose a file to add to the message. Only one file can be added at a time, but multiple files can be added individually. Once the file has been chosen, click **Upload** to copy the file into the message.

- **New Text** - Choose this to open a window to enter additional text. Click **Save** to attach the message as a text file.

- **New Voice** - If you have a microphone attached to the computer, or you have an integrated telephone, you will be able to include voice messages from the Web Access interface using the recording tool.
  - To start recording, click the **Record** record button. When finished, click the **Stop** button. The voice recording will be added to the message as a **WAV** audio file attachment. When you are satisfied with the message, click **Save**.
Sending the Message

When the message is ready, click the appropriate button one of the following buttons to continue.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send</td>
<td>Click this button to transmit the message immediately.</td>
</tr>
<tr>
<td>Send Later</td>
<td>Select a time when the message will be sent. Enter the year, month, day, hour, and minute to send the message, or click the calendar icon to pick the day. Click OK when ready.</td>
</tr>
<tr>
<td>Save and Close</td>
<td>Use this button to save the message to the drafts folder and return to the inbox. The message can be recalled, modified, and sent at any time.</td>
</tr>
<tr>
<td>Discard</td>
<td>Delete the message and return to the inbox.</td>
</tr>
</tbody>
</table>

Send a Fax

**Note:** This feature is only available if you have a fax board installed on the server to handle fax routing. Otherwise, faxes can be sent using the messaging client by setting the outgoing address to FAX: followed by the fax number (e.g. fax:9057079700).

All features for sending a fax are the same as for **Send a Message**. Enter the fax number in the TO field. Include all required digits, such as long distance and area codes, and any characters needed to access an outside line. Any attachments to the fax must be in the PDF or TIFF formats unless the voice server has been specifically setup to support other file types.
Reading Messages

To read the messages, clicking the Messages button will open your inbox. Read messages appear in normal text, while Unread messages are in bold. To open an message, click the contact's name in the From column.

The message will open in a new window.
The following controls are available:

<table>
<thead>
<tr>
<th>Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close</td>
<td>Close the message and return to the Inbox.</td>
</tr>
<tr>
<td>Reply</td>
<td>Send a response only to the sender of the message.</td>
</tr>
<tr>
<td>Reply to All</td>
<td>Send a response to the sender and all recipients of the message.</td>
</tr>
<tr>
<td>Forward</td>
<td>Pass the message along to another contact. Mouse over each button to display additional options (Text*, Voice, Fax, Add Comment†, No Comment†).</td>
</tr>
<tr>
<td>Copy Move</td>
<td>Duplicate / relocate the selected messages to another folder. You will be prompted to select the folder where the messages will be moved/copied to.</td>
</tr>
<tr>
<td>Trash</td>
<td>Send the selected messages to the deleted items folder. Using this icon from the deleted items folder will permanently remove the selected messages from the system.</td>
</tr>
<tr>
<td>Live Reply</td>
<td>Start a telephone call with the sender of the message. See description on page 170.</td>
</tr>
</tbody>
</table>

* - Choosing Text will send an email reply. Select Voice to record and send a voice message with the response. Pick Fax to send the reply as a fax.
† - Adding a Comment gives you the option to add or record a preface to the message before sending it to the new contact. Choose No Comment to send the message as it with no additions.

**Opening a Voice Message**

Web Access can play voice messages. When you open a voice message (an email with a voice file attachment), Web Access will automatically play the message. To replay the message, go to the Attachments tab and open the audio attachment through the interface shown here.

*Note*: If there is more than one attachment, click the Attachments tab and select the voice message you want to hear from the list.

**Opening a Fax Message**

When you receive a fax message, you can open the fax attachments within Web Access using the default Microsoft Windows Fax viewer. You may choose to either save the file to your local computer and then open it, or open it on the fly.

*Note*: If there is more than one attachment, click on the Attachments tab and select the fax message that you want to view from the list of attachments.
Adding Attachments to a Message

Aside from the attachments that are generated for you (e.g. fax and voice messages), you can also attach other files to a message through the **Attachment** tab. To attach a file, click the **Add** button. You have three choices:

- **File**: Click on Browse button to select a file you wish to attach. Click on the Upload button once you have made your selection to attach the file to your message.
- **New Text**: A simple text editor will appear. Compose the text then click save. The text file will be created and will be automatically included with your message.
- **New Voice**: The recording tool appears. Click **Record** and say your message into the microphone. When finished, click the **Stop** button and the voice file will be automatically attached to the message as a **WAV** audio file.

Live Reply (Dialing)

Web Access allows you to initiate a call from within a message, connecting you through your currently selected phone device. When you click **Live Reply**, the popup screen shows these options:

- **Phone Number of My current location**: Select the phone number you wish to use to connect with your contact. The voice server will first call you at this device, and then place a call to the contact once you have answered, seamlessly connecting both parties.
- **Type**: From the dropdown menu, select the type of phone number of your contact, **Internal** or **External**.
- **Number**: Enter the telephone or extension number of the contact to be dialed, or click one of the icons:
  - Open a dropdown list of numbers previously called. Click one to place the call.
  - Search for the number through your contacts list. Click one to place the call.
  - Expand the display to include area and country codes in addition to the number.
- **Dial**: Click this button to place the call. Your current device will ring and the call will be placed once you pick up.
- **Cancel**: Click this button to close the Live Reply window without placing the call.

Other

If you wish to perform an action on a message without viewing the content, enable the checkboxes to the left of the message list, then select the desired action button, such as **Move** or **Delete**.

---

**Note**: To change the order in which the messages are displayed, change the **Sort Order** from the main page under **Call > Telephony Options** (see page 200). The default is LIFO (newest first).

---

Additional controls are available through the buttons.

- **Text**: Choosing **Text** will send an email reply.
<table>
<thead>
<tr>
<th>Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="New" /></td>
<td>Create a new message. Hover the mouse over this button to view the available message types*. Select one to create a new message of that type.</td>
</tr>
<tr>
<td><img src="image" alt="Copy" /> <img src="image" alt="Move" /></td>
<td>Duplicate or relocate the selected messages to another folder. You will be prompted for the folder where the messages will be moved or copied.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>Update/refresh the message list.</td>
</tr>
<tr>
<td><img src="image" alt="Trash" /></td>
<td>Send the selected messages to the deleted items folder. Using this icon from the deleted items folder will permanently remove the selected messages from the system.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Click this button to access the online help system.</td>
</tr>
<tr>
<td><img src="image" alt="Views" /></td>
<td>The Views button allows you to filter the messages that are displayed. The default is <strong>Show All</strong> messages.</td>
</tr>
<tr>
<td><img src="image" alt="Prev" /> <img src="image" alt="Next" /></td>
<td>Use the arrows to move to the next/previous page of messages.</td>
</tr>
</tbody>
</table>

* - Select **Voice** to record and send a voice message with the response. Pick **Fax** to send the reply as a fax. **Mobile Text** sends the message as an SMS text message. The **Contact** option opens a window where you can add the person to your personal directory. Fill in the necessary details (name, contact numbers, employer, etc.) and click **Save and Close** when finished.
Recovering Deleted Messages

Any deleted messages and folders are moved into the **Deleted Items** folder. This allows you to recover the items as long as the Deleted Items folder has not been emptied.
To recover an item, move a message or folder back to its original location, or to any other location outside of the Deleted Items folder.

Emptying the Deleted Items Folder

Deleted messages and folders are moved to the **Deleted Items** folder. To permanently remove these items, select the **Empty Deleted Items Folder** option from the folder menu.

**Warning:** Once you empty the **Deleted Items** folder, you cannot recover the deleted items.
Fax Jobs

This section shows all sent, received, and pending fax messages. The time, date and number for each fax are listed.

Faxes that are still being processed by the system are also shown, with their current status (e.g. Dialing, Sending).

Any fax that has failed to send is listed with the reason for the failure (e.g. Busy, No Answer). If there are any problems making the connection, Web Access will automatically redial the number several times before stopping.

Note: This feature is only available if you have a fax board installed on the server to handle fax routing. Otherwise, faxes can be sent using the regular messaging client by setting the outgoing address to FAX: followed by the fax number (e.g. fax:9057079700).

The number of times the system will redial the number is controlled through the Officelinx Admin program.

Go to the Company > Integrated Fax tab.

Set the value in the Number of retries for printing file if no response field to control the number of times the system will attempt to send the fax. The default value is 5.

Click Send Fax to create a new fax message.
Greetings

It is important to fully customize your personal greetings so that you can easily convey your location and availability to callers. Unless there is a specific greeting defined, all callers will hear the default greetings for your availability setting, and where the call is coming from (internal or external).

Review and record all of the greetings associated with this account.

Add Greeting - Click here to create a new greeting in the chosen category.

Add greeting in different language - For entries that already have a greeting, this link lets you create a new one. Select a different language from the list and record the new greeting. This will be played when a caller chooses that language from the auto attendant.

Record - Select this link to open the record menu. When recording a greeting, choose the language for the greeting from the list. All languages available on your system will be listed. This greeting will play when a caller selects the specified language at the prompt.

Click Record when ready. Speak into the microphone/handset to record the greeting.

Click Stop to end recording.

Click Play/Pause to review what you have recorded.

Click Save when finished to save the greeting on the system.

Play - Choose this to review the current greeting for any item.

Delete - Click the icon to remove the associated greeting from the system.

**Note:** To choose the device used to record greetings, refer to Webclient Options on page 206 for more details.

**Hint:** It is best to use the desktop telephone to record greetings. Always record your greetings from any device in quiet surroundings to avoid distracting or embarrassing background noises appearing during playback.
My default greetings

On this tab, review or record your name, and the standard internal and external busy greetings that callers hear.

Name Greeting

Say your name. By default, this greeting is generated by the system using the TTS (text-to-speech) engine. The TTS engine has limited pronunciation, so record your name greeting yourself for best results.

Internal Personal Greeting

The Internal Personal Greeting is played when an Internal number calls you and you do not answer the call.

External Personal Greeting

The External Personal Greeting is played when an External number calls you and you do not answer the call.

Internal Busy Greeting

The Internal Busy Greeting is played when an Internal number calls you and you are already on the phone.

External Busy Greeting

The External Busy Greeting is played when an External number calls you and you are already on the phone.

Internal Unavailable Greeting

The Internal Unavailable Greeting is played when an Internal number calls you and your availability is set to unavailable.

External Unavailable Greeting

The External Unavailable Greeting is played when an External number calls you and your availability is set to unavailable.

Location Greeting

Review and record greetings to be played when you are at each specific location. (At Lunch, In Meeting, Vacation, etc.).

My custom greetings

Create custom greetings for specific contacts. When the system identifies and incoming caller through Caller ID, it will play the greeting assigned to that caller's number.

Note: You will require a functional microphone on the computer that you are connecting to Web Access from in order to record a greeting from the Web Access interface. Alternatively, you may record using an integrated telephone if you are at your work station by configuring Playback / Record.
Message Forwarding

If you have another email address that you use, or simply wish to backup your messages to another account, you can forward your messages from Web Access to any email address. You can configure multiple forwarding addresses, but only one can be active at a time.

Add new / Modify a forwarding address

To add or modify an existing Forwarding Address, refer to the below fields:

**Disable**: Enable this checkbox to stop forwarding messages.

**Message Destination**

Select one of these destinations for forwarding using the radio buttons.

- **Send to specified destination**: Select this radio button and enter the address to which you would like the messages forwarded.
- **Print to server’s default printer**: Sends the message to the default printer setup on the Officelinx Server.
- **Print to fax**: Forward the message to the specified fax number.
- **Google Doc**: Forward the message to a Google Docs collection. Enter the name of an existing collection to send the messages to. The path must be between forward slashes / (e.g. /collectionName/).
- **Storage Path**: Forward the messages to a custom location. Enter the path where the messages will be sent (e.g. C:\Users\PersonName).

**Note**: A Google Docs site must be setup on your system before you can use this option. Leaving the Collection Name field blank will cause all of the selected message types to be sent to the root of the user’s Google Docs site.

**Forward Details**

Select any additional forwarding rules using the radio buttons.

- **Forward Type**: From the dropdown menu, select the transfer type. **Forward** will keep a copy of the message in the original account mailbox, while **Relay** will remove the message from the original account after processing.
- **Message Type**: Select the type of messages that will be forwarded by enabling the desired checkbox(es): Email, Fax, Voice, Missed Calls.
- **Voice Format**: Select the audio encoding format from the dropdown menu that will be used to encode any voice messages.
- **Fax Format**: Select the file format that will be used to forward fax messages. Only TIFF and PDF are available by default. Other formats may be available if the appropriate programs have been installed on the server.
- **After**: The selected messages will be forwarded after a predetermined delay. To add a delay to your forwarded messages, enter the desired time in hours and minutes. Entering 0 minutes and hours will instantly forward the message the moment it is received.
- **Include Attachment(s)**: Enable this checkbox to include any attachments with forwarded messages.
Location

Locations are the central element of Officelinx. Your current status is defined by your location. All calls, messages and other communication interactions are enhanced by the custom rules configured for each location. A wide range of common locations is provided with the program, and you can create custom locations as required. All locations, both pre-defined and custom, can be modified through Web Access to suit your needs.

Web Access provides a means to manage your presence by creating and modifying locations, contact numbers and availability.

Change Current Location

Your current location, contact number and availability are displayed on the dashboard button.

To change your location, click the Change Current Location button on the dashboard.

Enable Use my locations calendar to have your location automatically follow your calendar.

Select the Override my locations calendar and set my current location radio button to manually change your location. Configure the remaining fields as necessary then click Save.

Current Location

These additional fields will only appear once the Override option is selected.

- **Current Location**: From the dropdown menu, select the location you wish to use (In Office, At Lunch, Meeting, etc.).
- **Availability at Current Location**: From the dropdown menu, set your availability status (Available, Unavailable).
- **Number**: The current number where you can be reached is displayed. Click the arrows to enter a different number. Select the correct Type (Internal or External) and enter the full Number including country & area code where necessary. You may also choose from the numbers associated with that location.

Note: Availability at Current Location and Number will automatically change to your current location’s defaults once you have chosen one. Make the needed changes after selecting a location.

Availability at Current Location

Choose either Available or Unavailable from the dropdown list. When Available, your current telephone will ring and the call will be transferred to voicemail or another number if there is no answer. If you are Unavailable, incoming calls will be immediately routed to your voicemail or to another number.

- **Override Availability Filters**: Enable this checkbox to override the Availability Filters configured for this location. Availability Filters are configured under the Locations button. With this option enabled, any exceptions made for this location by the filters will be ignored.
- **Appear unavailable if no caller ID**: Enable this checkbox to be unavailable if there is no caller ID with a call.
I will be at this location

Select one of the radio buttons to define how long you will appear at this location.

- **Until I change my location**: Continue at this location until it is manually changed again.
- **Until the next scheduled activity or the end or the beginning of working hours**: This location will be used until the next event in your calendar is reached, the current workday is over, or the next workday begins. Your location will then be changed based upon your calendar settings.
- **Till**: Enable this radio button to use this location until the specified time. Your location will then revert to your calendar defined schedule thereafter. Enter the year, month, day and time to stop using the current location and return to your calendar schedule.

Make any changes necessary, then click **Save** and return to the dashboard.

Locations

Use this dashboard button to create and manage your locations. Click an existing location to edit its details, or select **Add Location** to create a new one. Click **X** to delete that location.

**Note**: Predefined locations cannot be deleted or renamed, but they can be edited.

There are 5 tabs to edit for each location.

- **General**: Assign, edit and prioritize the numbers used with this location, and the default availability associated with each. Enable the checkbox beside one or more numbers configured for your account. When you receive an incoming call, each number will be called according to the rules set down on the **Find Me Rules** tab.

- **Location Greeting**: Choose a greeting to use for this location, and configure the rules for callers.

- **Availability Filters**: Create a customized availability rule for this location. Specify which numbers (internal/corporate or external) and contacts see you as available or unavailable.

- **Find Me Rules**: If you have more than one number selected for a location, you can define the rules that the system will follow when connecting incoming callers to your phone or mailbox. If only one number is selected for this location, this tab will not appear.

- **Assign Calls**: Automatically transfer incoming calls to another number depending on who is calling. Define the exact conditions of transfer to a single or group of callers.

Each predefined location, and any custom location, has its own settings. You can specify exactly how you appear (available or unavailable) and to whom, and how you can be reached at each location independently of the others.

**In Office**, for example, usually means that you are available to everyone, and can be reached at your desktop extension. **At Lunch** may show you as unavailable to all callers from outside the company, but available to internal calls. **Remote Office** could set you up as available to all, but route calls to your remote/home telephone, whereas **Mobile** will pass your calls to a cellphone. A **Temporary Location** could have you available, but reach you at a different extension within the company. **Extended Absence** or **Vacation** can play a custom greeting before transferring the call to a co-worker. For all locations, you can choose to allow or deny calls from specific contacts, so even if you are at lunch, that important call from a client will still reach you.
General

The General tab determines which number(s) will receive an incoming call when this location is active. Choose one or more numbers from those already connected to your account, or Add a new one.

**Name:** Enter or edit a name for this location. The names of pre-defined locations cannot be changed.

**Local location (within same time zone):** Enable this checkbox if this location is in the same time zone as the company offices.

**Default availability:** From the dropdown menu, select the status (available/unavailable) that will be automatically applied when you select this location.

Assign numbers for this location

Enable the checkbox on the left-hand side of for each number that is to be used with this location. Use the arrows to move the numbers up or down the list. The system will contact each number in order when receiving a call (see Find me rules here).

**Note:** You can have more than one number associated with a location. For example, while in the office you may have access to a desktop telephone, a softphone, and a cell phone. All three can be enabled for this location.

Click Add to create new telephone addresses, or Edit beside a number to modify an existing one. Specify the type of number (Internal, External), whether it should be the default number, and decide if it should be a trusted device or not.

When ready, click Save.
Location Greeting

The Location Greeting tab is used to determine which of your greetings are used with each location. Only one of these items can be selected at one time for this location.

**Play default greeting:** Select this radio button to play your default greetings for each situation (Default, On the phone, Unavailable). Click **Play** to listen to each greeting.

**Play Automated Name and Location greeting:** Enable this option to have a standard location and name greeting played.

**Play this greeting:** Select this radio button to record a custom greeting for this location. Clicking **Add Greeting** will open a window where you can record and save a new greeting.

**Options**

Click all that apply.

- **Do not allow callers to skip the greeting:** Enable this checkbox to force the callers to listen to the entire greeting.
- **Do not allow callers to leave messages:** Enable this checkbox if you do not want callers to be sent to voicemail after the greeting. Callers can instead be sent to the auto attendant voice menu, or the system will hang up.

Availability Filters

This tab allows you to customize the rules for giving callers access to your voicemail. These changes made here will override any other settings for this location.

**When I am available at the current location**

By default, all incoming calls are routed in the same way. However, you can create a list of contacts for whom you will appear unavailable regardless. Their calls will be processed according to the rules configured for when you are unavailable (i.e. go straight to voicemail). Select the custom rule you wish to apply.

- **Appear available to everyone:** Select this radio button to appear available to all callers. This is the default.
- **Appear unavailable to:** Select this radio button to appear unavailable to one or more of; in-office calls (**internal calls**), out-of-office calls (**external calls**) and calls from members of your contacts list (**All calls from my contacts**). Select all that apply. You can create exceptions for each of these rules so that some people will see you as available even if they belong to the groups specified.
- **Appear unavailable only to this list:** Select this radio button to appear unavailable only to members of a list that you create. Click **None** (the default) and create your exceptions list. This list is unique to this location. People on the list will see you as unavailable, while all others will see you as available. Incoming calls will be routed accordingly.
When I am unavailable at the current location

By default, when you are Unavailable, all incoming calls are routed in the same way. However, you can create a list of contacts for whom you will appear as available regardless. Their calls will be processed according to the rules you configure for your available status (i.e. ring your desktop telephone). Select the custom rule you wish to apply.

**Appear unavailable to everyone**: Select this radio button to appear unavailable to all callers. This is the default.

**Appear available to**:
- **internal calls** (**Internal calls**) and calls from members of your contacts list (**All calls from my contacts**) when you are in these locations.
- Select all that apply. You may also create exceptions for each of these rules so that some people will see you as unavailable even if they belong in the groups specified.

**Appear available only to this list**: Select this radio button to appear available only to members of a list that you create. Clicking **None** (the default) and create your exceptions list. This list will be unique to this location. People on the list will see you as available, while all others will see you as unavailable. Incoming calls will be processed accordingly.

Find me rules

The **Find me rules** tab will only appear when more than one contact number or device is selected under the General tab. From here you configure how the system will pass incoming calls through the multiple numbers selected.

**General Rule to Find Me**

Enable one of the following:

- **Only call me at the first number assigned to this location**: Select this radio button to have the system call you only at the first number assigned to this location on the General tab.

- **Call me at each of the numbers assigned to this location sequentially**: Select this radio button to have the system call you on each of the numbers assigned to this location in sequence, from top to bottom as they appear on the General tab. You may also configure additional settings when you choose this option. Refer to the **Find Me Options** and **Exceptions List** sections below.

- **Call me at all the numbers assigned to this location at the same time**: Select this radio button to have the system call all of the numbers assigned to the location simultaneously. You may also configure additional settings when you choose this option. Refer to the **Find Me Options** and **Exceptions** sections below.

**Note**: Call queuing will be automatically disabled on locations where find me rules are active.

**Find Me Options**

If you selected an option to have the caller find you, you can specify additional options. Select one of the following:

- **Automatically find me**: Select this radio button to have the system automatically try to find you (call your numbers as determined above) when a call comes arrives.

- **Ask the caller to find me**: Select this radio button to have the system ask the caller if they want to find you.
Exceptions

Exceptions are only available if you have selected Call me at each of the numbers assigned to this location sequentially or Call me at all the numbers assigned to this location at the same time.

Instead of using the same Find Me Rules for everyone, you can specify how different contacts will function. You can turn off the follow me options for some, and assign different behavior for others. To add an exception click the New Rule button.

Give the rule a name and select the specific behavior for this rule. As above, select if the system should ring only the first number, all of the numbers in sequence, or all of the numbers at the same time. Add the contacts that are included in the rule by adding them to the Who Will Find Me list. Click None to build the list of contacts.

Assign Calls

This tab allows you to route your incoming calls to another extension or agent. An assigned call will not be processed by your own mailbox or rules, but will be passed to the selected alternate destination.

Assign my calls to: Enable this checkbox to have your calls routed to another number or user account. Enter the number/account to which you want your calls sent.

Note: Click on the Address Book button to select the user from a list. Click on the Check Names button to have the system check what you entered and, if recognized, express it in the proper format.

Play a greeting before assigning the calls: Enable this checkbox if you want the system to play a greeting before transferring the call. This enables two options:

- **Play my Name followed by the name of the person the call is assigned to**: If you enable this radio button, the pre-assignment greeting will be your name followed by the name of the person to whom the call is being passed.

- **Play this greeting**: If you select this option, you can have a specific greeting play before calls are assigned. Select your greeting and the language of the greeting from the accompanying dropdown menus.

Exception List

New Rule: Click this link to create Exception Rules. When a new window appears, name and configure the exception, then Save. For detailed information, refer to Find Me Options - Exceptions.
Calendar

Your Calendar is a schedule that displays exactly where you are at any given time. If you have recurring events or a set schedule, a location calendar will be convenient since you will not have to manually change your location every time. Your status will be automatically updated according to the schedule.

A user's calendar details are synchronized with a Microsoft Outlook, Exchange or Google Apps account. Call routing is based upon the location and availability specified in the calendar.

Navigation

- Use the arrows to move forward and backward through the calendar. Each click shows the next or previous week's events.
- This icon can be used to jump to the desired date. Open this calendar and click on the date to be displayed.

Schedule a Location

Click the **Schedule a Location** button to add an event to the schedule. Add the following details:

**Location**: From the dropdown menu, select at which location you will appear at during the event. Incoming calls will be routed according to the settings made for that location.

**Availability**: From the dropdown menu, select your availability for this event. Incoming calls will be routed accordingly.

**Schedule description**: Enter a description or name for the event you are creating.

**Start /End**: Specify the start and end times for the event. You may enable the All day (24h) checkbox to have the event last for the entire work day.

Click on the calendar icon to select the date for the event.
Enable Recurrence

The Enable Recurrence button allows you to set events to repeat at regular intervals. You can create an event that lasts for several days, and define the exact time frame that it will be valid for during those days. You can also choose the days of the week separately, so that you can configure a repeating schedule that covers the entire working week.

Click the Enable Recurrence button to create a repeating event and enter the start and the end times. The main menu items are on the left, while the submenus for each appear to the right when selected. Enable one of the following radio buttons:

**Daily:** When selected, you must choose Every weekday or Every X days. For example, entering 1 will make the event occur everyday while entering a 2 will have it occur every other day.

**Weekly:** Enable Weekly, then specify the day(s) of the week on which the event will occur. Define the pattern of Every X weeks. For example, entering 1 will schedule the event for every week while 2 will schedule the event for every other week.

**Monthly:** Enable this option, and set the day of the month for the event. When using the first radio button, define the day itself (e.g. 1st or 15th of the month) by entering only the number, then X months. Entering 1 as the X will make the schedule occur every month while 2 will make the schedule occur every other month. For example, **Day 7 of every 2 months.**

The second option will allow you to be more dynamic in your choices. For example, **Third Friday of every 1 month.**

**Yearly:** With Yearly selected, specify a single day of the year by choosing the month and the day for the event, such as Every June 6. You can also select a generic time for the event. For example, **First Friday of March.**

Range of recurrence

The Range of recurrence defines the period over which the event will continue to repeat. The event will appear in your calendar until the range of recurrence has passed. Select one of the following radio buttons and define additional fields where necessary.

**Note:** No matter which radio button you choose, you must always first select a start date. By default, today’s date will be entered automatically.

- **Start:** Provide the date when the event will begin repeating. Enter the year, month and day.
- **No end date:** Select this radio button to have the event repeat indefinitely beginning at the start date.
- **End after X occurrences:** Select this radio button to have the schedule expire after it has occurred X times.
- **End on:** Select this radio button to define an exact end date of the recurrence.
Adding/Modifying a Location Calendar

To create a new calendar, or to modify an existing one, click the Change Calendar button at the top of the calendar display window, then select New location calendar. To modify an existing calendar, choose Edit beside the chosen calendar.

Name: Enter a name to help you identify the calendar's function.

Time Zone: From the dropdown menu, select a time zone to use with this calendar.

Default working hours: Define your working day by setting the Start Time and the End Time. Type the times in the spaces provided, or click the arrow beneath each field to open a dropdown list where you can select the time.

Copy local locations from existing calendar: Enable this checkbox and select an existing calendar from the dropdown menu. The location information from the selected calendar will be copied to the current one.

Click Save and Close when finished.

Changing Your Active Locations Calendar

Officelinx allows you to maintain multiple calendars, but only one may be active at a time. To designate a calendar as active, click the icon from the calendar display window and select the radio button that is located beside the calendar that you wish to use.

Options

Move the mouse over the Options button to access additional calendar settings: Change Time Zone, Change working hours, Hide local locations, Show all hours.

Change Time Zone

If you are traveling, or have relocated to another time zone, you should change the time zone of the calendar so that your calendar is properly aligned with local time.

Select the desired time zone from the dropdown menu then click OK. The current calendar will synchronize to the new time zone.

Change working hours

If you have a set work schedule, you can setup your calendar so that you are only available during the hours you are working. This will make it easier to manage your calendar since the schedule will be more compact; only the hours you have selected will appear in the calendar display rather than the full 24 hour day.

Select the Start Time and the End Time for your working day, or use the arrows and select the times from a list. Your current calendar will be adjusted to reflect the new schedule.
Hide/Show local locations

Select Hide local locations to have the calendar display only events at locations outside the current time zone. Choose Show local locations to display all events in the calendar regardless of the time zone.

Note: Each location has a checkbox to specify if it is considered a Local location. Start from the dashboard, then go to Locations and set this option on the General tab.

Show all hours / Only show working hours

This item will toggle the display between showing all hours in the day and only the hours in the work day. This provides access to times outside of office hours when necessary, while still allowing the display to be compact most of the time.

Addresses

The Addresses button on the dashboard allows you to add and manage the phone numbers and email addresses where you can be reached. These addresses will be associated with your locations.

There are various types of addresses that can be created: Phone, Email, Fax, Beeper, SMS and Other. To create a number of any type, click the tab for the type of the desired number and then click Add.

To modify an existing address, click the address.

Phone

A Phone address may either be an internal (such as an extension) or an external number (like a cellphone).

Open the Phone tab, then click Add to create a new address. To modify an existing address, click the address.

Hint: To quickly change your default address, select the radio button to the left of the address entry to flag it as the default. You may only have one default for each type of address.

Internal

To define an internal number, click Add then enter an extension in the Number field. You may also choose to configure the following items.

- **Set as Default**: Enable this checkbox to use this number as the default phone address.
- **Trusted**: Enable this checkbox to flag this as a trusted number. Trusted numbers may be required by some voice verification features which allow you to log into the system using your voice instead of entering your password on the keypad.

Click Save to add the number to your addresses.
External

When defining an external number, it is best to include as much information as possible. Click the expand button to access additional information (country, area and city codes). Provide the complete details for the number. You may also choose to configure the following items.

**Set as Default**: Enable this checkbox to use this number as the default phone address.

**Trusted**: Enable this checkbox to flag this number as a trusted number. Trusted numbers may be required by some voice verification features which allow you to log into the system using your voice instead of entering your password on the keypad.

**Note**: When you enter a full string of numbers including both country and area code (e.g. 14163332222) in the simplified interface, Web Access will automatically parse the data and distinguish the country and area code within the number.

Click **Save** to add the number to your addresses.

Email

Configure your email addresses here. The address defined here will also be used by Officelinx to send notifications unless you specify a different location.

Open the **Email** tab, then click **Add** to create a new address. To modify an existing address, click the address.

Type an email address into the space provided. You may also choose to configure the following item.

**Set as Default**: Enable this checkbox to use this email as the default email address.

**Hint**: To quickly change your default address, select the radio button beside the address entry to flag it as the default. You may only have one default for each type of address.

Click **Save** to add the email address to your list.

Fax

If you have a fax machine, you can opt to receive fax messages through your machine instead of through email. When a fax is sent to your mailbox, the system will automatically convert the fax message into an email address and deliver it to your account. However, if you have a fax address defined that is currently available, the system will attempt to forward the fax to the machine first before delivering the message as an email. A Fax address may be an internal or external number.

**Hint**: To quickly change your default address, select the radio button beside the fax entry to flag it as the default. You may only have one default for each type of address.

Open the **Fax** tab, then click **Add** to create a new address. To modify an existing address, click the number.
Internal

To define a new fax number, click **Add** then enter the extension in the **Number** field. You may also choose to configure the following items.

**Set as Default**: Enable this checkbox to use this number as the default fax address. Click **Save** to add an internal number to your address.

External

When defining an external number, it is best to include as much information as possible. Click the expand button to access additional information (country, area and city codes). Provide the complete details for the fax number. You may also choose to configure the following item.

**Set as Default**: Enable this checkbox to use this number as the default fax address.

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**Note**: When you enter a full string of numbers including both country and area code (e.g. 14163332222) in the simplified interface, Web Access will automatically parse the data and distinguish the country and area code within the number.

Click **Save** to add the number to your addresses.

Beeper

Enter the **external** pager number that the system will call. The beeper address defined here will be used by the system for notification and for other paging purposes, such as pre-transfer paging.

Open the **Beeper** tab, then click **Add** to create a new address. To modify an existing address, click the address.

**Hint**: To quickly change your default address, select the radio button beside the beeper entry to flag it as the default. You may only have one default for each type of address.

When defining an external number, it is best to include as much information as possible. Click the expand button to access additional information (country, area and city codes). You may also choose to configure the following items.

**Set as Default**: Enable to use this number as the default beeper address.

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**Note**: When you enter a full string of numbers including both country and area code (e.g. 14163332222) in the simplified interface, Web Access will automatically parse the data and distinguish the country and area code within the number.

Click **Save** to add the beeper number to your list.
The SMS address will also be used for notification and text messaging, which includes messaging from the Chat functions in iLink Pro. You may define an email address or an SMS capable telephone number (e.g. cell phone) as an SMS address.

Open the **SMS** tab, then click **Add** to create a new address. To modify an existing address, click the address.

**Hint:** To quickly change your default address, select the radio button beside the SMS entry to flag it as the default. You may only have one default for each type of address.

From the dropdown menu, select either **Email** or **Phone** as the SMS address.

### eMail

To add an SMS email address, pick **Email** from the dropdown menu. Type the entire address into the space provided. You may also choose to configure the following item.

- **Set as Default:** Enable this checkbox to use this email address as the default SMS address.

Click **Save** to add the email address to your list.

### Phone

To add an SMS telephone address, pick **Phone** from the dropdown menu. Type the entire telephone number into the space provided. When defining an external number, it is best to include as much information as possible. Click the expand button to access additional information (country, area and city codes).

You may also choose to configure the following item.

- **Set as Default:** Enable this checkbox to use this number as the default SMS address.

**Note:** When you enter a full string of numbers including both country and area code (e.g. 14163332222) in the simplified interface, Web Access will automatically parse the data and distinguish the country and area code within the number.

Click **Save** to add the SMS number to your list.
Other

On the Other tab, you can specify any VPIM or Reply To addresses. Unlike other addresses, you may have both a VPIM and a Reply To address active at the same time.

A VPIM address is automatically assigned by the server and cannot be modified. It will usually be in the format of MailboxNumber@Server.com. This is the address that the system uses to receive your messages. If you have any type of message synchronization configured (e.g. IMAP/IMSE synchronization with Microsoft Exchange), this will be the account that synchronizes with the other email server.

The Reply To address can be any email address that you use. This address will be the default address that the messages will be sent From, and is the address that contacts will use when they "Reply To" your email messages.

To change your reply to address, click the email address. Enter in the desired email address, then click Save.
People

From the People section of the dashboard, you can add or import as many contacts as desired. These are the contacts that appear in your personal directory. You can also create distribution lists to send a message to multiple contacts.

Contacts

Use the Contacts button on the dashboard to view all of the people currently in your personal directory. Contacts can also be modified and deleted from this window.

In most cases, a user's details are synchronized with a Microsoft Outlook, Exchange or Google calendar to be available through any channel. Changes to one program will appear in the other program.

Add Contact

Web Access lets you create an unlimited number of personal contacts. To add someone to your list, click the Add Contact button on the dashboard. There are 4 tabs for each contact: Contact Properties, Other addresses, Attachments, and Custom Fields.
Contact Properties

Use the Contact Properties tab to enter the contact's details. Add their full name and titles, the company name and address, phone numbers, and any other details you need.

**Full Name:** Enter the contact's name in the space provided. Click the **Full Name...** label to open a popup window where you can include their personal title (Dr., Mr., Sir, etc.), first name, middle name, last name and suffix (I, PhD, Jr, etc.).

For example, to add Dr. Johnathan Quincy Public III, click **Full Name...** and specify his title (Dr.), first name (Johnathan), middle name (Quincy), last name (Public) and suffix (III). The Title and Suffix can be entered manually or chosen from a dropdown list.

Click **OK** when finished.

**Mailing Address:** Enter the contact's mailing address in the space provided. Click **Mailing Address...** to specify the street, city, state/province, zip/postal code and/or country.

Click **OK** when finished.

**Company Name:** Enter the name of the contact's company.

**Job Title:** Enter the person's corporate job title (President, Sales Manager, CFO, etc.).

**Department:** Enter your contact's department.

**Phone/Phone2/Fax/Mobile/Beeper/Email/Web Site:** Enter the details to reach the contact.

**Note:** Click the icon to have the system apply proper formatting to the numbers entered in these fields.

**Note:** Click the button to enter additional telephone information in a new popup window. From this window, you can add the person's country, area or city code, and their telephone number.

**Birth Date:** Enter the contact's birth date, or select the date using the calendar button.

**Gender:** Select their gender from the dropdown menu.

**Speech enable this contact:** Enable this checkbox to turn on the feature to dial this contact by speaking their name.

**Play this greeting:** From the dropdown menu, select the greeting that will play whenever this contact calls your mailbox. This can be a personalized message specifically for this person.

**Language to play:** From the dropdown menu, select the language of the greeting (if applicable).

**Comments:** Enter any comments you may have regarding your contact for your reference.

**Note:** Not all of these fields are required.
Other addresses

Use this tab to configure any alternate means to contact this person. Enter their **Personal** or **Other** contact information in the spaces provided. A contact’s **Personal** information covers their home address and phone number. **Other** information includes an alternate mailing address, email, phone or fax numbers, and ISDN / TTY / SIP details.

Attachments

This tab allows you to associate documents, pictures and other items with the contact.

**Hint:** Affixing attachments to a contact allows you to organize all materials you maintain in your inbox, in folders and at your workstation. By attaching items such as photos, resumes/CVs and other assorted documents (emails, faxes, call transcripts, etc.), you can create a single resource for all information associated with a contact.

Hover the mouse over the **Add** button to see a list of the types of object you can attach to the contact. These are: File, New Text, and New Voice.

**File:** Select this option, locate a file to attach to the contact, and upload it into Officelixn.

**New Text:** Choose this option to open a text entry window where you can type additional notes.

**New Voice:** Click to open a window where you can record a voice file to attach to the contact's details.
Custom Fields

Use this tab to add extra information about your contact. Create your own fields and populate them as appropriate. Click **New**, give the new field a name, then enter the value it should contain. Click **OK** when finished.

Search Contacts

If you have many contacts, it can be difficult to find an individual by looking through the entire directory. Instead, use the search function to find the contact you want.

Click the search button at the top of the contact window, and enter the first or last name of the contact. Click the **Search** button to find all matches in your personal directory.

Importing a Contact

If you have a list of contacts on another platform, such as Microsoft Outlook, you will be able to import their data instead of manually typing it again. Click the **Import** button at the top of the contact window to begin.

The information must be exported from the original application to a **comma-delimited** (CSV) file. Using Web Access, Choose the exported data file and click **Next**. Tell the system which item in the data file corresponds to each field on the contact list. This allows the imported data to be copied to the correct fields in the Officelinx database.

After verifying that all fields are properly linked, click the **Import** button to add the contact data to your directory.
Speech Enable Contacts

You can specify that a contact should be “Speech Enabled” so that you can speak the contact’s name to select that person when connected to Officelinx over a phone line.

Click the **Speech Enable Contacts** button at the top of the contacts window, and select the appropriate directory from the **Select from** popup menu.

Search through the list to find the contacts to speech enable. Place a checkmark in the box to the left of each name.

When finished, click the **Add** button. The selected contacts appear in the **Selected items** pane at the bottom of the window.

When the list is complete, enable the **Enable Speech** radio button at the top of the window and click the **Apply to Selected Contacts** button.

---

**Note:** The number of contacts you can speech enable is limited. Consult with your system administrator for more information.

---

Call a Contact

To place a call to a contact, click the person’s name in the Contacts list, then click the **Call** icon.

Their number will appear in the **Number** to dial field. This number can also be entered manually. Click the expand button to access additional information (country, area and city codes) if required. The number from which you will place the call appears at the top of the window. Change this number if necessary using the dropdown menu.

Click **Dial** when ready to place the call. Your selected device will ring and Officelinx will complete the call to the contact.
Lists

The Distribution lists button on the dashboard provides you with an easy way to send messages to a group of contacts. For example, if you frequently send voicemail to the Sales department, you can create a distribution list called “Sales” containing the names of everyone in the department.

The lists you create here are your **Private** lists and are not available to other users. **Public** distribution lists are created by the System Administrator.

### Add / Modify a distribution list

Create a new distribution list by clicking the **Add List** button in the upper left corner of the window. To edit an existing list, click the name of the list.

- **Save and Close**: When you have finished creating or editing the list, click this button to save the changes and return to the Lists window.
- **Discard**: This button will return the list to its original state, ignoring any changes made.
- **List Number**: Give the list a number. This allows access to the list through the telephone keypad.
- **List Name**: Enter a name for the distribution list.

The **Search** pane displays contacts based upon the parameters you enter into the space provided. Find a contact and enable the checkbox to the left of their name to add them to the **Recipients** pane.

- **Search**: Instead of browsing the categories, you may also search the entire database for a contact. Type in the information then click on the Search button to find all the matching contacts.
- **Add**: Click this button to copy the selected contacts to the **Recipients** box at the bottom of the window.
- **Delete selected items**: Click this button below the Recipients pane to delete the selected contacts from the list of recipients. Place a check in the box beside each name to be removed, then click this button. Contacts are removed from the distribution list but not from the system.

The **Select from** pane allows you to search specific directories for contacts to add to the distribution list. Select a directory to view from the dropdown list and enable the checkbox to the left of their name to add them to **Recipients**.

- **Select from**: From the dropdown menu, select the directory that contains the contacts that you want to add to the distribution list.
  
  - **All colleagues**: Select anyone within your company.
  - **All private contacts**: Select from your private directory.
  - **All public contacts**: Select from the corporate list of public contacts.
  - **Department**: Select someone in the specified company department.
  - **Email**: Manually enter an email address for the recipient.
  - **Remote Sites**: Type an email address, then use the dropdown menu to choose from the domains that are pre-configured from the remote sites on the server.
  - **Phone Numbers**: Manually enter an phone number of the recipient.
  - **Fax Number**: Manually enter the fax number.
  - **SMS:Email**: Manually enter an SMS enabled email address.
  - **SMS:Phone**: Manually enter a SMS capable phone number.

When finished, click the **Save and Close** button at the top of the window.
Sending a message to a Distribution List

Once a private or public distribution list has been setup, it can be accessed when sending a message by adding the list number or the list name in the TO field, then press Enter.

**Note:** Distribution Lists created in Web Access are only available when sending messages from Web Access.
Notification

When you are away from your desk or out of the office, you may not know if you have received an important message. The Notification section of the Web Access dashboard can be configured to notify you upon receiving messages.

For example, if you receive a voice message in your office inbox, Web Access can be instructed to email you, or it can call your cell or home phone number to notify you of the message’s arrival.

**Note:** Notification is only available to accounts with *Messaging and Collaboration (Avaya Mainstream)* Desktop Capabilities. An account with *Messaging (Avaya Basic)* alone will not have access to this feature.

**Note:** Alerts are sent immediately when a message arrives as long as it is within the hours setup in the schedule. You will not be notified for any messages that are received outside of the scheduled times.

Schedule

The Schedule button on the dashboard of Web Access allows you to specify phone and email addresses that will be used to contact you when you have a message. After specifying your contact methods, you can assign a schedule to a notification address. Alerts created without a schedule become *Special Cases*.

**Note:** Since getting notified for every message can be overwhelming, you can configure the timing and conditions for notifications from *Options* on page 185.

To create a new alert, click **Add New Notification**, or click the address of an existing alert to modify it.

**Address:** From the dropdown menu, select the address you want the notifications to be sent to. This can be an internal or external phone number or an email address. The entries in the list are configured under *Addresses* on page 186.

**Number of retries:** Enter the number of times that the system will attempt to notify you. This option is only used for phones or pagers. Notifications through email and SMS are always sent only once.

**Minutes between retries when line is busy:** Enter the number of minutes that the system will wait between notification attempts when the telephone number is busy (only for phones or pagers).

**Minutes between retries when there is no answer:** Enter the number of minutes that the system will wait between notification attempts when the telephone number is not answered (only for phones or pagers).

**Schedule description:** Enter a name or description for the current notification schedule for your reference.

**Enable / Disable Recurrence:** By default, the notification schedule will have recurrence enabled. If you decide to disable recurrence, the notification will always be on during the defined time. For example, if the **Range of recurrence** and the **Start Time** is set to January 01, 2018, 0:00 and the **End Time** is set to December 31, 2018, 23:30, you will be notified for the entire year. The **All day (24hr)** option will have no effect since the schedule already covers the a full 24 hours. Disable Recurrence to create a *Special Case*. 

**Note:** Notification is only available to accounts with *Messaging and Collaboration (Avaya Mainstream)* Desktop Capabilities. An account with *Messaging (Avaya Basic)* alone will not have access to this feature.
Recurrence

Recurrence saves you the trouble of setting up a notification repetitively. You can create a notification schedule that spans multiple days and defines the time frame that it will be valid for during those days. You can also choose the days of the week separately, so that you can configure a schedule for your entire working week. Recurrence is enabled by default.

**Start Time** and **End Time**: From the dropdown list, specify a time range for the notification schedule. For example, if you want this schedule to be in effect from 9 AM to 5 PM, select 9:00 from the **Start Time** dropdown menu and 17:00 from the **End Time** dropdown menu. Notifications will only be sent between these two limits.

**All day (24hr)**: Enable this checkbox to have notifications sent out regardless of the time of day they are received. Start and End times are disabled while this option is selected.

Recurrence Pattern

Enable one of the following radio buttons and specify any additional details.

**Daily**: Decide if the schedule is to be active **Every weekday**, or **Every X day(s)**. Entering 1 will have provide notifications daily, while entering a 2 will make it every other day.

**Weekly**: Choose the day(s) of the week on which notifications will be sent, and define the pattern of every X weeks. Entering 1 will have notifications sent every week while 2 will send them every other week.

**Monthly**: Specify the **Day of every X month(s)**. For Day, enter only the day number. For example, selecting **Day 12 of every 2 months** will send alerts on the 12th day of every other month.

The second option provides a different set of choices. For example, you can choose to be notified on the **Last Friday of every 1 month**, or the **Third weekday of every 3 months**.

**Yearly**: Pick a single day of the year by selecting the month and the day. You can also be more specific. For example, you can choose the **First Friday of January**, or the **Fourth weekend day of July**.

Range of recurrence

Range of recurrence defines the period over which the notifications will continue to occur. Select one of the following radio buttons and define additional fields where necessary.

**Note**: No matter which radio button you choose, you must **always** first select a start date.

**No end date**: Select this radio button to have the notifications continue indefinitely beginning at the start date.

**End after X occurrences**: Select this radio button to have the schedule expire after it has occurred X number of times.

**End on**: Select this radio button to define an exact end date of the recurrence.
Being notified for every single message can be overwhelming. Configure the types of messages that will trigger a notification from the Options button.
When the options have been configured, click Save.

Notification Filters

Use these options to determine what type of messages, and from where they come, will generate a notification.

For new voice/text/fax messages, only notify me for the following types:

Select the type of message that will create a notification. Choose all that apply.

- **All**: Generate a notice for all messages.
- **OR**
- **Certified**: Generate a notice for certified messages.
- **Internal**: Notify for messages arriving from inside the company.
- **Urgent**: Send an alert for messages marked ‘Urgent’ or ‘High importance’ by the sender.
- **Private**: Notify for messages flagged as ‘Private’ or ‘Confidential’.
- **External**: An alert will be generated for messages that arrive from outside the company.
- **With Caller ID**: Only messages that include a caller ID will generate notifications.

Telephony Options

An alert can be sent whenever the system transfers a call for you to another extension. The message goes out through the intraoffice paging system (telephone speakers, PA system, etc.) and takes the form “There is a call for John Smith.”

Configure when the page is announced when a caller is transferred.

- **Before transferring**: Enable this checkbox to have the system page you before transferring a call.
- **After transferring**: Enable this checkbox to have the system page you after transferring a call.
Wakeup Call

You can use Web Access as a personal alarm clock by creating a wake-up call. Click the **Wakeup Call** button on the dashboard and fill out the following information.

Only one Wakeup call can be active at one time.

- **Number**: Enter the number where you wish to receive the wake-up call. Alternatively, select a number from the dropdown menu which includes all of the phone numbers created for your account under People on page 191.

- **Date**: Enter the date on which the wake-up call will be placed, or click the calendar button to select a date.

- **Time (hour) / (min)**: Enter the time to place the wake-up call.

---

**Note**: The time you specify must be in 24-hour format. To set a 9:45 PM flight to New York and you need 1 hour to get to the airport. If you wanted to set a wake-up call for 8:15 PM on Sunday, August 12, 2018, you select “2018”, “August” and “12” from the Date dropdown menus, then type in “20” and “15” in the Time fields.

---

**Note**: You may also configure a wakeup call through the TUI (Telephone User Interface) after logging into your mailbox. The wakeup call entry is shared between Web Access and the TUI.

---

When ready, click **Save**. Officelinx will call you on the specified device at the chosen date and time.
Settings

The **Settings** section of the dashboard allows you to customize both your Web Access experience. You may also delve into automated features such as forwarding or notification from here. Please refer to these topics for more information.

Web Tutorial

The **Web Tutorial** button on the dashboard will guide you through setting up your mailbox for use in Web Access. Although your administrator has likely done this for you, this wizard will help you to become familiar with the options available on the system. You will be able to make modifications to the system through this wizard. It is recommended that you run the wizard once before exploring the program more fully. See [page 164](#) for details on the tutorial.

The administrator may require that you run the tutorial once before using Web Access. You will receive an email message with a link to launch the wizard where you can enter your details.

Account

Change your account settings and passwords from this menu the **Account** button on the dashboard.

Account Settings

This section manages your credentials for logging in to Officelinx.

**User Name:** This is your login account name, and is usually your email address.

**Password / Confirm Password:** Use this field to change your account password. Enter and verify a new password for your mailbox. This password can contain both letters and numbers.

**Note:** You must click the **Save** button at the top of the window in order for the changes to be applied. This password is for both Web Access and iLink Pro.
Voicemail Password

This section allows you to manage your password for logging into your telephone devices to listen to voicemail messages.

**Password / Confirm Password:** Enter and verify a new password for your voice mailbox. This password must only contain numbers as it will be entered from a telephone keypad.

Domain Account Name

This is a display of your domain account name which is managed by the network administrator.

Synchronization Options

This section allows your voicemail account to access a third party email provider, such as Gmail, Outlook or Exchange. The same information is copied to both accounts so that you can use your favorite program to manage your messages.

**Locked:** This checkbox is enabled when IMAP credentials are refused by the server when performing IMAP/TSE synchronization. When enabled, obtain the correct IMAP credentials, enter the information, then disable the checkbox to continue the synch.

**User Name:** Enter the user name for your IMAP email account. This will usually be your email address.

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**Note:** Passwords may not be required in some situations. For example, if your company is using a Super User authentication with synchronization, you will only need to enter the user name.

**Voice Format:** From the dropdown menu, select the type of compression which will be used on your outbound voice messages. You should ensure that the voice format chosen here is compatible with the destination. It is recommended that you leave this field at its default value unless you are specifically instructed to change it.

Last Synchronization Time

This displays the last time your Inbox, Contacts and Calendar were synchronized with an external server such as Gmail or Outlook.

Miscellaneous Options

This section lets you specify the date format, toggle the use of speech recognition when dialing, and view hints on the many screens within Web Access.

**Date Format:** From the dropdown menu, specify the date format that will be used for your account. Choose between yyyy/mm/dd, dd/mm/yyyy, and mm/dd/yyyy.

**Include all my private contacts when I initiate a voice search for a contact:** Enable this checkbox to include all private contacts in a voice search.

**Include my company’s public contacts when I initiate a voice search for a contact:** Enable this checkbox to include the company’s public contacts directory in a voice search.

**Automatically include my signature or attach an electronic business card to outgoing messages:** Enable this checkbox to send your signature or an e-business card with all outgoing messages.
Interface Options

Show Hints: Enable this checkbox to display summarized help. The hints appear on each screen with a yellow background.

When you have finished editing your account, click the Save button at the top of the screen to make the changes permanent.

Call

Configure the settings for your integrated telephone from here the Call button on the dashboard.

Telephony Options

Use this section to assign transfer options and toggle call forwarding.

Caller ID: From the dropdown menu, select the way in which you will be notified when you receive a call in the iLink Pro. Choose from the following options on the dropdown list:

None: Do not ask an incoming caller for his/her phone number if they are not recognized by the system. Also do not display it in a screen popup.

Ask: Prompt an unidentified caller to enter his/her phone number using a touch tone keypad.

Pop: Display an incoming caller’s phone number.

Ask & Pop: Ask an unrecognized caller to enter his/her phone number and to display that number in a screen popup.

Personal Operator: Select the personal operator that you want the call to be transferred to. When you define a personal operator, it will override the default operator for your mailbox.

Enter phone number: Enable this checkbox to enter a the telephone number of the person who will act as your personal operator. With this checkbox disabled, you must enter the address for that person’s mailbox.

Resolve Entry: Search within the company directory to find the name and extension of the person entered in the field (e.g. entering “John” may find “1234:John Smith”).

Address Book: Opens the company directory so you can select your personal operator.

Voice Menu default greeting: From the dropdown menu, select the default greeting for the personal voice menu
that you are currently using.

**Long distance access code**: Enter the long distance access code used by your company (where applicable).

**Camp On**: When someone calls your extension but the line is busy, enabling this checkbox will give the caller the option to be notified when your line is free.

**Call Screening**: Enable this checkbox to force the callers to provide their name.

**Call Queuing**: Enable this checkbox to place callers in a queue when your line is busy. If queued, callers will be informed of their position in the hold queue and asked to either continue holding or leave a voice message.

**Warning**: Call Screening and Call Queuing are available only on telephone systems that provide a busy tone. Most telephone sets with multiple extension appearances do not produce busy tones.

**Note**: Call Screening and Call Queuing are mutually exclusive. You may choose one or the other, but not both together.

**Record all incoming calls**: Enable this checkbox to record all incoming calls. The recorded calls are sent to your inbox as a voice message.

**Fax Detection**: Enable this checkbox to allow incoming faxes to deliver their message to your inbox if the call is unanswered. With this box unchecked, the phone set will ring but the call will be dropped if it is not answered and the system identifies the call as a fax.

**Call Forwarding Enable**: Enable the checkbox to forward incoming calls to the number defined in the field. You may only forward your calls to an internal number (e.g. another mailbox). Enter the number to forward to in the space provided.

### Re-route Options for CTI Integrations

If you have a telephone system that supports CTI integration, you can configure it so that the system will automatically change the settings depending on your phone's status.

**When DND is set on my phone**

Select the action that will occur when you receive an incoming call and your phone is set to **Do Not Disturb**. Only one option can be active at one time. Incoming calls will be routed accordingly.

- **Nothing**: Select this radio button to do nothing when you receive a call and the phone's DND button is on.
- **Change my availability to Unavailable**: Select this radio button to appear Unavailable when DND is switched on.
- **Set my location to**: Select this radio button and choose your **Location** and **Availability** from the dropdown lists. Your location and availability will be changed when you push the DND button on your phone.

**When Forward to Voice Mail Group**

Select the action that will occur when you receive an incoming call and your phone is set to forward to another extension.

- **Nothing**: Select this radio button to do nothing when you receive a call and the phone is set to forward calls.
- **Change my availability to Unavailable**: Select this radio button to appear Unavailable when your phone is configured to forward calls.
- **Set my location to**: Select this radio button and choose your **Location** and **Availability** from the dropdown lists. Your location and availability will be changed while you are forwarding your calls.
Telephony Options

Sort Order

**LIFO** (Last In, First Out): Select this radio button to play the newest message first, oldest message last. When viewing messages through Web Access, the newest messages will be at the top of the list.

**FIFO** (First In, First Out): Select this radio button to play the oldest message first, newest message last. When viewing messages through Web Access, the newest messages will be at bottom of the list.

*Note:* Changing Sort Order will affect the order in which all messages (email, voice, fax) are displayed under My Messages.

**Say Envelope Information:** Enable this checkbox to always hear the envelope information (e.g. sender's name, date received, etc.) for each voicemail message.

Webclient Options

**Play Back Device:** From the dropdown menu, select the device (e.g. PC Sound Card, Phone) that will be used to play messages and greetings.

**Record Device:** From the dropdown menu, select the device (e.g. PC Sound Card, Phone) that will be used to record messages and greetings.

*Note:* When you choose Phone as your device for play back or recording, keep in mind that you must have access to your integrated phone to play or record messages. This means that if you're using Web Access from a remote location, you will not be able to listen to or record messages unless you change the Device to PC. PC settings will use the devices which are attached to the current computer.

Help

This button on the dashboard is used to access the online help file for Web Access.
Accessing an account requires a password. The voicemail and application passwords can be reset through any web browser from the UC Server web page.

1. Using any web browser, enter the URL for the voice server (i.e. user.yourcompany.com). Select Reset Password.
2. Enter an email address and select the password to reset: reset Voicemail Password or Application Password.

3. Enter the security code in the space provided, Click Send a Request when ready.

4. The specified email address will receive a message with a link. Click on the link to enter the details of the new password.
5. Enter a new password in the spaces provided, then click **Reset Password**.

6. The account password will be changed to the new value.
There are many cellphones, smartphones and tablets available today with different operating systems and capabilities. This table summarizes which mobile platforms are supported by iLink Pro, and which features are supported under each system.

<table>
<thead>
<tr>
<th>Feature</th>
<th>iOS (iPhone/iPad)</th>
<th>Android</th>
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<tbody>
<tr>
<td>Locations</td>
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<td>- Location Services/GPS Integration</td>
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<tr>
<td>Company Directory/Groups</td>
<td>•</td>
<td>•</td>
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<tr>
<td>- Search</td>
<td>•</td>
<td>•</td>
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<td>Call History</td>
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<td>- Call back mobile device</td>
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<td>- Call back alternate device</td>
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<td>- PBX Call Control (ECC)</td>
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<td>- Mobile device contact integration</td>
<td>•</td>
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<td>Voice Mailbox Direct Access</td>
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<tr>
<td>Multi-languages</td>
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<td>Auto-login/Auto Re-Connect</td>
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<td>- Chat Notification</td>
<td>iOS 4 +</td>
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<td>- New Call Notification</td>
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<td>- Message Waiting Notification</td>
<td>iOS 4 +</td>
<td>•</td>
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<tr>
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<td></td>
</tr>
<tr>
<td>Landscape Orientation Support</td>
<td>•</td>
<td>•</td>
</tr>
</tbody>
</table>
In This Chapter:

212  Introduction
212  Installing iLink Pro
212  iLink Pro for Android
215  iLink Pro for iPhone
218  Logging In
219  Navigation
220  People
223  Chats
224  Calls
226  Unread Messages
226  Timeline
227  My Location
228  Settings
Introduction

The iLink Pro app allows you to take advantage of UC functionality from an Android or Apple mobile device. The program provides access to your contact list and the company directory, so making telephone calls and Internet messaging is only a few clicks away. All voice, email, and fax messages are reachable through the app, and your location and availability can also be controlled allowing contacts and colleagues to always know how to reach you.

iLink Pro provides a complete mobile UC solution to meet your most demanding communication needs.

Installing iLink Pro

The iLink Pro mobile app may be installed from the web store for your device's operating system, either the Goodle Play Store or Apple's App Store, or from play.google.com. Perform a search for Avaya, and download the iLink Pro app.

Android iLink Pro for Android

Avaya iLink Pro is installed directly from the Google Play Store onto your device.
1. Open the Play Store and search for **Esna**. Select **Esna Tech**.

2. Choose **iLink Pro**, then tap **Install**. When prompted, tap **Accept** to give the app the necessary permissions.
3. When finished, tap **Open**, or use the **iLink Pro** icon 📲 on the device.
iLink Pro for iPhone

Avaya iLink Pro is installed directly from the App Store onto your device.
1. Open the App Store and search for **Esna**. Select **Esna Technologies Inc**.

2. Choose **iLink Pro**, tap **Get** and **Install**.
3. When finished, tap **Open**, or use the **iLink Pro** icon on the device.
Logging In

1. On your device, launch the app and select the appropriate login credentials from the drop down list.

   The options are **iLink Account**, or to sign in using a **Google account** (email).
   
   **iLink Account**: Enter your mailbox login details.
   
   **Use Google Credentials**: You will be prompted to select the Google account to use to login to the program.

2. Once the login method has been chosen, click **Login**.

3. Enter the necessary login information.

4a. When selecting **iLink Account**, enter the following information:

   **Mailbox**: Enter your Application User name.
   
   **Password**: Type in the password.
   
   **Server**: Enter the address of the company Officelinx server. This value is the same regardless of the credentials chosen (e.g. `user.yourcompany.com`).
   
   **Port**: Enter the port number that is used to access the server. Typically, this value can be left at its default.

   Tap **Login** to start the app.

4b. When you select a **Google account**, choose from the list the account to use to access the program. The accounts displayed are those that are already setup on the device. They cannot be added or created through iLink Pro.

   **Server**: Enter the address of the company Officelinx server. This value is the same regardless of the credentials chosen (e.g. `user.yourcompany.com`).
   
   **Discover**: Use this option to have the system use the selected email account to attempt to locate the server information.
   
   **Port**: Enter the port number that is used to access the server. Typically, this value can be left at its default (13777).

   Tap **Login** to start the app.

5. iLink Pro will start.
Navigation

The main screen of the app contains links to various features in the program.

Across the top:

- Go back to the previous page. Click repeatedly to continue backtracking through your recent history.
- This icon opens a Utility Menu. The items shown depend upon the page it is called from.
- The title bar describes your current page within the app.
  The label will change depending upon where you are.

Across the bottom:

- Click the People icon to access your address book and the company directory. You can also search for contacts and manage groups from here.
- Chat (Instant Messaging) provides access to Recent and Active chat sessions. Previous conversations can be reviewed and continued from this window and new sessions can be launched.
- Use Calls to enter a telephone number or extension and place a call. Call control options (e.g. Hold, Transfer, Hangup) are provided. Any recently called numbers are displayed.
- Messages shows the number of unread email, fax and voice messages waiting for you on the server.
- This icon opens the Timeline. The history of all changes to location, availability, and phone status for your contacts is shown here. The Timeline keeps records for the previous week.
- The My location icon shows your current location and availability. Touch this icon to change these settings. Custom locations can be created through Web Access. The green/red/yellow dot in the corner of the icon depicts your availability status (available, unavailable, on the phone).
People

Users can access their personal contacts and the company directory through the People page of the app.

The green/red/yellow bar to the left of the contact's picture indicates that person's Availability (available, unavailable, on the phone).

A person's location is shown in the text below their name. All status indicators are updated in real-time.

Tap a contact to open the Interactions Menu.

The Utility Menu provides the following options:

Groups: Use this option to manage your Groups.

Settings: These items allow users to configure their program to suit their needs. See the section here for complete details on these options.

Logout: Close the program and return to the login screen.

About: Get the details on the version of the app installed on the device.

Interactions Menu

Tap a contact in the display to open the Interactions Menu.

That contact's number, name, location and availability are shown. Choose an option.

- Call the contact through the listed number. Your desktop telephone will ring and the UC Server will place the call to the selected number or extension.
- Video Chat will start a video conference with the contact. Both parties must have a camera enabled on their device for this option to function correctly.
- Choose Chat to begin an instant messaging session with the contact. Your outgoing messages appear in the window right-justified, while incoming messages are to the left.
- Finding one individual within a large list of contacts can be difficult. Groups membership allows users to organize contacts into meaningful collections to make finding the right person much simpler. Contacts can belong to more than one group. This item shows which groups this contact belongs to.
- Pin to top causes that contact's details to always appear at the top of the main People pane below your own name display. Use this to give the most commonly used contacts greater visibility and accessibility. Select the contact and choose Unpin from top to remove the contact from the main screen. This does not remove the contact from the directory.
- Selecting Timeline will open the history of all location and availability events associated with that contact.
- Show on a map will open a web browser and display the contact's current location using Google Maps. Tracking can be turned on/off through the Officelinx Admin program.
- **Notifications** allows you to specify what events for the selected contact will create a popup on the main window.

  - (This item is only available on Android devices) The **List in widget** option will place the contact into the Android widget. Refer to [The iLink Pro Widget on page 231](#) for complete details.

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**Groups**

Groups are collections of related contacts. These are unique to you and are created as required. A contact can appear in many groups.

Any groups that you create appear on all of your devices.

To access a work group, tap it in the **People** window. Groups appear beneath the list of contacts, so you may need to scroll down to find them. The window expands to show the contacts within.

Tap the group name to view the contacts it contains. Tap the menu icon to manage the group parameters.
Manage groups

From the People page, tap the utility menu and choose Groups. All of your groups are shown. Select the one to manage.

Use this page to rename and delete work groups, or to communicate with all members of the group.

The number of members in the group is shown at the top of the list.

- Chat - Broadcast an instant message to all members of the current group.
- Timeline - Show the tracked timeline events for all members of the current group.
- Show on map - Display the locations of all group members using Google Maps.
- Rename - Changes the name of the group.
- Delete - Erase the group from your list. Contacts in the group are not deleted and continue to appear in the directory.

Create a new group using the Utility Menu.

- Add group - Use this option to create a group. Enter a name for the group, then tap Create.

Directory Search

To search through your personal contacts and the company directory, type the mailbox number, extension, or the contact’s first or last name in the Search or dial field. All matches will be displayed. Tap a contact to open their Interactions Menu.

Touch the X to clear the search window.
**Chats**

- **Chats** lists each contact with whom you have recently held an instant messaging session. Tap a contact in the **Chats** or **Recent chats** list to review or continue that conversation. Your picture appears on the right-hand side of the window beside your messages, and the contact’s picture appears on the left beside theirs.

  Type your message in the space provided at the bottom of the window. Tap the arrow to send the message.

  When receiving an chat message that has not yet been viewed, a blue light will flash in the upper right-hand corner of the chat icon.

  The contact’s name and a time stamp for each message are included.

  The record of the conversation persists until the app is closed, or until cleared by the user.

- **Call**: Place a telephone call to the contact. Officelinx will first call the number for your current location. Once you answer the call, the UC server will place another call to the contact.

The **Utility Menu** is only available within a chat session. It provides the following options:

- **Clear**: This option will remove all entries from the chat session. Both sides of the conversation will be erased.
- **Share location**: Select this item to send through Chat a Google Maps image showing your location.
- **SMS**: Toggle the ability to send chat messages using SMS messaging service if available to the receiver.
- **Back**: Return to the previous screen.
The **Calls** icon allows you to make telephone calls.

At the top of the window is your current default telephone device, which the program will use to place outbound calls. Tap in the bar to view and change the current dialing options. The most recent numbers dialed will be displayed below the number entry field. Tap one of these, or enter a new number or extension in the **Enter phone number to dial** field. Touch the X to clear the search window.

Once a number has been selected, the UC Server will search through the rules established in the **Dial Plan Engine** and display all matches. These rules are created by the administrator, and are used to break the number into its constituent elements: area code, city code, exchange and the telephone number are identified using these rules, allowing the UC Server to accurately route the call. Rules can be made for different purposes, such as for local, long distance and overseas destinations.

<table>
<thead>
<tr>
<th><strong>DIAL PLAN RULES</strong></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>(201) 234-5678</td>
<td>201 = New Jersey</td>
</tr>
<tr>
<td>International</td>
<td>20 1234 5678</td>
<td>20 = London, England</td>
</tr>
</tbody>
</table>

Select the number that best matches the recipient of the call. Your own telephone device will ring and the UC Server will place the call to the selected number.

The **Utility Menu** from Call settings provides the following options:

- **Call History**: This will display all of the calls made from this account through any source (mobile device, desktop phone, etc.). Touch an entry to view the details of the call. The number can be called directly from the history pane.
- **Address book**: Use this option to open the contact list on the device. Select a contact in the book to place a call to that person.

**Call Controls**

While you are on the phone, the **Calls** window shows the status of active call. The status of the call is displayed beneath the number.

Tap the progress window to open the Call Control menu.

- **Hand Off** will pass the call to another extension without any delays. This is used when you want to move the conversation from the device to another telephone.
- **When Transfer** is selected, the call is put on hold and you will be prompted to enter the extension or telephone number to send the call to.
- **Put on hold** will pause the call, muting the microphone and allowing another call to be placed.
- **Hang up** icon ends the call.
- **Remove** will close the Call Control window without affecting the call.
After the call has finished, Call Control provides the following options.

- Touch **Callback** to initiate a new telephone call to this number.
Unread Messages 🔵

Go to **Unread Messages** to show the number of unread messages waiting on the UC Server. If a message is waiting, a blue light will flash in the upper right-hand corner of the messages icon.

The number of unread emails 💌, voice messages 📞, and faxes 📄 are shown.

The **Utility Menu** for Unread Messages provides the following option:

**My Voice Mailbox**: Use this option to place a call to your voice mailbox to retrieve messages left on the system.

Timeline 📅

The **Timeline** provides a history of activity for contacts. The information includes the time of the event, the contact's name and picture, and a description of the event.

The Timeline saves all events for 1 week, or until cleared by the user.

The **Utility Menu** provides the following options:

**Settings**: Choose from the list which events will be shown. Selected events will have a check ☑️ beside them.

- **Location change**: Create an alert if the contact's location changes.
- **Online status change**: Create an alert if the contact goes online or offline.
- **Phone status change**: Create an alert if the contact answers a call or hangs up.
- **Chats**: Create an alert when you receive an instant message.
- **Calls**: Create an alert when you receive a telephone call.
- **Messages**: Create an alert if you receive any kind of message.
My Location

Location and availability can be modified from this page. To change a setting, tap **My Location** and select a new location and availability setting. Once an item has been chosen, the location icon will change to match your selection.

**Location:** Select from the list of preprogrammed locations. Any default availability and extension settings configured for that location will be set as well. Custom locations are created using Officelinx.

**Availability:** Set and change your available / unavailable status.

**Schedule:** Specify if your location should follow your calendar, or if it should be changed until the next calendar event, or for a specified length of time.

**Extension:** Choose the number where you can be reached from the list of configured extensions.

The **Utility Menu** provides the following option:

**Positioning:** Use this option to toggle the GPS tracking ability of the device. This allows other users to determine your current whereabouts.
Settings

Settings is accessed through the Utility menu on the People page. Use this menu to configure how the app will operate on the device.

**Auto-start**: Enable to automatically launch the iLink Pro app whenever the device is powered up.

**Own phone number**: Enter the telephone number of this device.

**Upload recent calls**: This option will send the details of telephone calls made through iLink Pro on the device to the voice server to ensure that a complete record is available to you across all platforms. Details of calls made through the device dialer (i.e. NOT using iLink Pro) will not be uploaded.

**Outbound call control**: Turn this on to allow hold and transfer functions when placing calls from the device.

**Call back auto-answer**: When placing a call, the voice server will call the desired number, then dial the device to bridge the two calls. Enable this option to have the device answer this call automatically. If disabled, the device will ring and wait to be answered by you.

**Voice server phone number**: Used in conjunction with, and enabled by, Call back auto-answer, the number entered here, if any, acts as a filter. Only incoming calls from this number will be automatically answered. Calls from all other numbers will cause the device to ring normally.

**Dial options**: See the entry below.

**Do not show spatial tracking notification**: If GPS tracking is operating, turn on this option to disable notifications for position changes.

**Enable positioning services**: Turn on the GPS positioning service of your device to provide your up-to-date location details to other users.

**Positioning mode**

- **Network**: When the system determines your current geographic location, it will use the location of your network IP address. This is less accurate (e.g. it may give the location of your Internet service provider’s office), but uses less battery power on the device.

- **GPS and Network**: When the system determines your current geographic location, it will use the GPS coordinates provided by your device. This is extremely precise, but uses more battery power on the device.

**On chat message**: Enable to play a tone or vibrate the device when a new chat message is received.

**On new call**: Enable to play a tone or vibrate the device when a new call is received.

**On MWI**: Enable to play a tone or vibrate the device when your desktop telephone alert status light changes.

**Show status bar icon**: Turn this on to display the iLink Pro icon in the status bar of the device.

**Ask password**: When enabled, accessing a voice mailbox from the device will always prompt the user to enter their password. When disabled, the previously used password will be applied automatically.

**Show settings**: When making a call from the device, check this box to display the Call Settings dialog box.

**Diagnostic logging**: Enable this checkbox to have the device log additional activity to help diagnose connection and other problems. Disable to have the device log only standard actions. Log files have a fixed size, with the newest data replacing the oldest data in the log.

**Send logs**: Click this button to email the logged data to a specified address.
Dial options

Each time a call is made, these options determine how the call is routed.

**Show the screen each time you dial:** Enable this option to display this screen every time a call is placed from the device. Disable to automatically route the call according to these settings without prompting the user.

**Use direct dialing:** Outbound calls will be placed from the device, and will not be routed through the voice server. Call Controls are not supported when using direct dialing.

**Use current extension:** An outgoing call will be placed by the server, which will then call back the currently selected extension to bridge the call.

**Use registered extension:** Where several extensions are configured for the account, enabling this option will allow the user to pick which extension will receive the call back to bridge the call.

**Specify:** Enable this option to manually enter the call back number the system will bridge the call to.

**Call back to this device:** The voice server will use the specified device when connecting the call. Enter the number of the device to call in the space provided.
10

THE ILINK PRO WIDGET

In This Chapter:

232 Introduction
232 iLink Pro Widget Installation
232 iLink Pro Widget Installation
236 Using the Widget
Introduction

The iLink Pro Widget is provided as part of the iLink Pro for mobile devices installation.

Supported Platforms

The iLink Pro Widget is only supported on Android devices.

iLink Pro Widget Installation

Once iLink Pro has been installed and is running on the device (see iLink Pro for Mobile Devices on page 211 for complete details), the Widget can be added. Follow these steps to install the iLink Pro Widget on your Android device.

1. Select a home screen that has sufficient empty space to install the widget onto.

2. Touch and hold on the screen until the new menu pops up. Select Widgets.
3. Locate and select the iLink Pro Widget group.

4. Tap the size of widget you wish to use.
The selected widget appears on your screen.
**1x1:** The smallest widget provides a shortcut to manage your locations.

**2x2:** This widget displays your current location and contact number. It also provides shortcuts to your location manager, the Chats and the Dialer panes within the iLink Pro app.

**4x4:** This option displays your current location and contact number, as well as the name and location information for the contacts that you have specified should appear in this widget. Tap a contact to open their interactions menu. Use the arrows to view the additional contacts on this list.
**4x4+:** This option displays your current location and contact number, as well as the name and location information for the contacts that you have specified should appear in this widget. Tap a contact to open their interactions menu. Scroll down to view the additional contacts on this list.

**Note:** If the iLink Pro has not been started, the widget display will be empty.
Using the Widget

Toolbar

<table>
<thead>
<tr>
<th>Button</th>
<th>Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Location</td>
<td>Your current location. This will change depending upon your calendar.</td>
</tr>
<tr>
<td></td>
<td>Widget contacts</td>
<td>Used to create the list of contacts from a group in the main screen of the widget.</td>
</tr>
<tr>
<td></td>
<td>Call</td>
<td>Place a telephone call.</td>
</tr>
<tr>
<td></td>
<td>Send</td>
<td>Send a message in text format.</td>
</tr>
</tbody>
</table>

Location

This icon displays your current location defined in your locations calendar. The calendar is maintained by the iLink Pro app or desktop program. It can also be set manually through the app.
Widget Contacts

Tapping on the Widget Contacts button opens a page allowing you to add contacts to the main screen of the 4x4 widget. These contacts are drawn from your Groups.

1. Tap **Show my groups** to open a list of your iLink Pro groups.

2. Select a group to see a list of all contacts within that group. Tap a contact and choose **List in widget**.
Call

Tapping the Call icon will bring up a search window allowing you to find the contact you wish to call. You can enter the client's name, number, or any portion of it and the system will return all possible entries.

Note: If no matching contacts are found, the number entered will be the one dialed.
Search by Name

1. To search based upon a contact's name, tap the Call button on the widget screen.
2. Open the Utility menu and choose Address book.

3. Enter any part of a contact's name to search through the local contacts. Choose the desired contact from the list of matches.

   **Note:** Only contacts that have a telephone number associated with them will appear in the search results.

4. If the contact has more than one number, select the number to use.
5. Select the appropriate options from the Call-back number screen. These options determine the source of the call as viewed by the recipient. The recipient will see this number as who the call is from. The call will still be placed through the mobile device.

   **Show the screen each time you dial**: Enable to show this screen each time you wish to make a call. If disabled, all future calls will bypass this option window.

   **Note**: Only one of the following three options can be enabled at one time.

   - **Direct call**: Place the call through the device (e.g. cell phone).
   - **Use current extension**: Place the call through the currently configured telephone device (e.g. deskphone, iLink Pro app).
   - **Use registered extension**: Enable this option and choose from the list of your available extensions (e.g. telephone extension, cell number, direct line).
   - **Specify**: Enable this item to manually enter the number to be displayed.
   - **Call back to this device**: Enable this option to identify the current mobile device as the source of the call.

6. Tap **Dial** to place the call.

   **Hint**: The next time you wish to place a call using the widget, you will see a list of all previous calls made. Tap one of these items to place the call.
Send

Tapping the Send icon opens a window allowing you to initiate a text conversation with a contact. Messages can be sent via Chat, or through SMS if your account has been configured for it.

1. Tap the Send button on the widget screen.
2. Search for a contact. The widget will return a list of matches. Select the one you want to have a conversation with.

3. The target for your messages will appear in the title bar. Type your message in the text box.
4. Tap the arrow to send the message.

**Hint:** The history of the conversation (both incoming and outgoing messages) appears in the space beneath the text entry box.
## APPENDIX A: REVISION HISTORY

<table>
<thead>
<tr>
<th>Date</th>
<th>Issue</th>
<th>Change Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>22 Nov., 2018</td>
<td>10.7 (2)</td>
<td>Updated Avaya branding.</td>
</tr>
</tbody>
</table>
| 4 March, 2019  | 10.7.0.1 (3) | SP 1 Initial Release.  
OL now supports VMWare 6.7.  
Scalability to 80000 users.  
Integration with Avaya S8300E.  
Added Group Mailboxes. |