iLINK for Cisco Jabber
iLink for Cisco Jabber is an extension to Google’s Chrome Web Browser or an Add-on to Internet Explorer. Once installed, it uses Jabber to provide contact and call management right from the browser. It can also be installed as a plug-in to Salesforce and Skype for Business.

This document provides installation instructions, and a User Guide to aid in getting the most from the extension.
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INSTALLING CERTIFICATES
FOR CUCM AND CUP

Introduction

iLink for Cisco Jabber integrates with the Cisco Unified Communications Manager (CUCM) and Cisco Unified Presence Server (CUPS, or IM and Presence Services), version 8.6 and above. The Cisco software must be configured and operating before attempting to install the extension.

The Cisco servers must have the proper certificates installed to enable the correct operation of the program. This applies to both Cisco Unified Call Manager (CUCM) and Cisco Unified Presence Server (CUPS, or IM and Presence).
Installing Certificates for CUCM

Finding the FQDN Name

You can skip this step if you know the FQDN (Fully Qualified Domain Name)

1. Enter the IP address of the CallManager server in a web browser.
2. Click on Cisco Unified Communications Manager.

3. Login to the system with an administrator account.

4. Go to System > Server at the top right, and click Find in the search line.
5. You’ll see the hostname of the server here.

The FQDN of the server will be the hostname + the domain setup during installation.

In this example, if your domain is company.com, the FQDN will be host-cucm.company.com.
Generating a CSR

1. In the CallManager window, under Navigation, select Cisco Unified OS Administration.

2. Login with an administrator account.
4. Click Generate CSR.
5. Select tomcat and click Generate CSR.

6. Close the Generate CSR window.
7. Click the Download CSR button.

8. Select tomcat and click Download CSR.

9. Submit the CSR request to a Certificate Authority (Purchase an SSL Certificate).
10. Once you have a response from the CA, login to Certificate Management from Presence OS Administration.
11. Click **Upload Certificate/Certificate chain**.

![Upload Certificate/Certificate chain](image)

12. Under **Certificate name**, choose **tomcat**. Click **Choose File** and select the certificate response file provided by your CA.

13. Click **Upload File**.

![Upload File](image)

**Note:** If your SSL certificate provider gave you an intermediate certificate, you will have to upload that certificate to the tomcat-trust Certificate Name store.

14. After the certificate is uploaded, restart the tomcat server. SSH into the **CallManager** server (using Putty for example). Login and type the following command:

```
utils service restart Cisco Tomcat
```
Installing Certificates for CUPS

The Cisco Unified Presence Server (or IM & Presence) for iLink for Cisco requires 2 certificates:
- tomcat
- cup-xmpp

Finding the FQDN Name

1. Login to the administration page of the Presence server.
2. Mouse over System and click Cluster Topology from the pop-up menu.
3. The FQDN appears in 2 places on this screen.
4. From the **Presence** interface, in the top right, click **Navigate** and select **Cisco Unified OS Administration**.

5. Login with an administrator account.
6. Go to **Security > Certificate Management**.
7. Click **Generate CSR**.
8. Select **tomcat** and click **Generate CSR**.

9. Close the Generate CSR window.
10. Click the **Download CSR** button.

11. Select **tomcat** and click **Download CSR**.

12. Submit the CSR request to a Certificate Authority (Purchase an SSL Certificate).
13. Once you have a response from the CA, login to **Certificate Management** from **Presence OS Administration**.
14. Click **Upload Certificate/Certificate chain**.

15. Under **Certificate name**, choose **tomcat**.
   Click **Choose File** and select the certificate response file provided by your CA.
16. Click **Upload File**.

![Upload Certificate/Certificate chain](image)

**Note:** If your SSL certificate provider gave you an intermediate certificate, you will have to upload that certificate to the tomcat-trust Certificate Name store.

Repeat this process using the **Certificate name cup-xmppp** (in place of tomcat).

The CUP server will also have a cup-xmpp-trust if the CA provides an intermediate certificate.
Final Steps

1. Go to **Cisco Unified IM and Presence Serviceability**.

2. Go to **Tools > Control Center - Feature Services**.

3. Enable the radio button next to **Cisco XCP Web Connection Manager** and click **Restart**.

4. Restart the tomcat server. SSH into the CUP/IM & Presence server (using Putty for example). Login and type the following command:
   
   ```
   utils service restart Cisco Tomcat
   ```
Download and Installation Procedure

iLink for Cisco Jabber can be installed as an extension to Google’s Chrome web browser. It integrates with the Cisco Unified Communications Manager (CUCM) and Cisco Unified Presence Server (CUPS, or IM and Presence Services), version 8.6 and above. The Cisco software must be configured and operating before attempting to install the extension.

The iLink for Cisco Jabber 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 for Cisco Jabber. Refer to Google’s documentation at the address below for further details:

https://support.google.com/chrome/a/answer/1375694?hl=en

There will still be some user intervention required to allow the installation of the Cisco Web Communicator extension on that computer. This only occurs the first time that the browser is launched.

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 esna and hit enter. Click on Extensions.
3. Click ADD TO CHROME beside iLink for Cisco Jabber to launch the installer.
4. When prompted, click Add extension to confirm the installation.

The installation is complete. Proceed to Logging In to iLink on page 31.

**Note:** The iLink for WebEx for WebEx extension must also be installed if WebEx meeting support is required.
Download and Installation Procedure

iLink for Cisco Jabber can be installed as an add-on to Microsoft’s Internet Explorer web browser. It integrates with the Cisco Unified Communications Manager (CUCM) and Cisco Unified Presence Server (CUPS, or IM and Presence Services), version 8.6 and above. The Cisco software must be configured and operating before attempting to install the extension. The iLink for Cisco Jabber add-on is installed directly from the link shown below.

Pre-requisite

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

Installation

iLink for Cisco Jabber may also be installed as an add-on to Internet Explorer. The add-on is controlled and managed by the Esna Add-Ons for Internet Explorer application.

1. Open Internet Explorer and go to https://manage1.esna.com/ichrome/iChrome.application.
2. If you are prompted to select the application to open the file, choose Internet Explorer.
3. The installer will prepare to install the add-on.
4. A prompt to confirm the installation will appear.

Click Install to continue.
5. If presented with a security warning concerning files to be installed, click Run to continue with the installation.

![Security Warning](image1)

6. Internet Explorer should not be running during the installation. If prompted to close IE:

![Internet Explorer Warning](image2)

**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.

7. The Add-on will be installed.

![Add-on Installation](image3)
8. When the installation is complete, the **Esna Add-Ons for Internet Explorer** window will appear.

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

![Esna Add-Ons for Internet Explorer](image)

Click the box for iLink for Cisco Jabber to enable the extension.

9. A check will appear in the upper right corner of the iLink for Cisco Jabber box indicating that the extension has been loaded into Internet Explorer.

![Esna iLink for Cisco Jabber](image)

The installation is complete. Proceed to **Logging In to iLink on page 31**.
The Esna Add-Ons for Internet Explorer

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

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

   ![Esna Add-Ons for Internet Explorer](image)

   **Hint:** After the installation, the Esna 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.

   ![Esna Add-Ons for Internet Explorer](image)

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

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

• The selected add-ons and Esna Add-Ons for Internet Explorer will be launched automatically each time that Internet Explorer is started.

• Closing the Esna Add-Ons 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 Add-Ons toolbar will be gray. Click the icon to start the login procedure.

• The iLink for Cisco Jabber extension must also be installed if WebEx meeting support is required.

• In IE, removing all websites listed under Compatibility View is required for iLink for Cisco Jabber 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 iLink for Cisco Jabber icon.

Chrome Extension

Internet Explorer Add-On

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

The login procedure for the iLink for Cisco Jabber 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 set of 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 window](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 for Cisco Jabber the necessary permissions, click **Allow.**

   ![Salesforce login](image)

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

2d. **Email account credentials 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 (see Creating an Account with OnEsna on page 40).**

   When prompted, enter your OnEsna username. If the program recognizes it as a valid account, you will be prompted to enter your password. Click **Log In.**

   ![Email login](image)

   If prompted to grant iLink for Cisco Jabber permissions, click **Allow.**

2e. **Use Create account to make a new set of credentials for use with the Email account login option above.**
3. iLink for Cisco Jabber requires the details of the servers to use for your presence and voice server data. These values should be entered automatically using OnEsna.com on page 42; this data is filled in when the license is registered, or the values can be entered manually if necessary. If multiple configurations are available for your company, select one from the Connection profile dropdown menu. Typically, this can be left at Site default. If you need to change the values, click Show prefilled options.

**IM/Presence provider:** From the dropdown list, choose which application provides this service. By default, this is set to Use Cisco Jabber.
- If you have a Skype for Business account you would prefer to use, then select either Use Skype Online or Use Skype or Lync On-Prem, depending upon which service you have (Cloud based or On-premise).
- If you have a Lync 2013 account that you would prefer to use, then select Use Skype or Lync On-Prem.

When you select Use Skype or Lync On-Prem, you will be asked for your Skype / Lync user name and password.

**Presence server:** This is the FQDN for the Cisco Unified Presence server for this connection. For example, cups.company.com.

**Media server(s):** This is the FQDN for the Cisco Unified Call Manager. Where multiple servers are required, separate each with a comma. For example: cucm.company.com, cucm.othercompany.net.

**User:** Enter the Cisco username for the current user.

**Password:** Enter the corresponding password for the Cisco account.

**Save credentials:** When enabled, future logins will not require the user to enter their details. Leave this checkbox disabled to force users to enter their information each time they start the program.
Note: Audio and video calling requires the Cisco WebCommunicator plugin. iLink for Cisco Jabber will automatically check for this plug-in each time it launches. If it is not installed, it will prompt the user to download the current version. Follow the on-screen instructions to install the package. If the plug-in is not installed, iLink for Cisco Jabber will not have voice, audio, or call control functions available.

Hint: When connecting from outside the corporate network, such as a remote office location, a VPN connection is required to access the servers. If a VPN connection is not established, the login will fail.

Click Connect when ready.

Note: iLink for Cisco Jabber can operate without the Cisco Unified Presence server. This configuration supports phone functions only. Enter a dash - in the CUP server field. If you only need the IM and Presence features, then enter a dash - in the field for the Media Server.

4. The extension has been installed. The icon will be gray when the program is not running, and it will be in color after logging in.
5. Click the iLink for Cisco Jabber 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.
Cisco Web Communicator

iLink for Cisco Jabber uses the Cisco Web Communicator extension to enable voice and video features. iLink for Cisco Jabber checks for this extension each time the program is launched. If the extension is not found, or if it is out of date, you will be prompted to install it before proceeding.

1. If the Cisco Web Communicator extension is not found, or is out of date, when iLink for Cisco Jabber is launched, the following screen will appear. Click Install beneath Cisco Web Communicator Chrome extension.

2. The download for the extension is automatically accessed through the Chrome web store. Click ADD TO CHROME to install the extension.
3. When prompted, click **Add extension** to confirm the installation.

![Add extension dialog](image)

**Note:** Typically, installing the Cisco Web Communicator is only done once. iLink for Cisco Jabber will check for the extension each time it is launched and will run the install routine if it detects that there are updates that must be installed. This ensures that the program and associated software are always up-to-date.

4. When finished, click **Install** beneath **Cisco Web Communicator Binary package** on the upgrade screen to update the installation with any required patches or missing files.

![Upgrade screen](image)

**Note:** Where present, both links must be used, in the listed order, for the Web Communicator extension to be installed correctly.
Advanced Login Options

iLink for Cisco Jabber provides the option to take greater control of the servers for sites where the required functions are spread across many machines.

Show pre-filled options

1. At the iLink for Cisco Jabber Connection screen, click Show prefilled options.
2. The advanced login screen appears. Fill in the required information and click Save to launch the program.

   **Presence server**: Enter the FQDN for the Cisco Unified Presence server for this connection. For example, cups.company.com.

   **Media server(s)**: Put the FQDN for the Cisco Unified Call Manager in the space provided. For example, cucm.company.com.

   Where multiple servers are required, separate each with a comma. For example: cucm.company.com, cucm.othercompany.net.

Show advanced options

If you are using the User defined option under Connection Profile, you will have a new option.

1. At the iLink for Cisco Jabber Connection screen, click Show advanced options.
2. The advanced login screen appears. Fill in the required information and click Save to launch the program.

   **CCMCIP server(s)**: Put the FQDN for the CCMCIP (Cisco Unified Call Manager IP Phone) server in the space provided. CCMCIP servers locate and store data on all devices attached to the system.

   **CTI server(s)**: Put the FQDN for the CTI (Computer Telephony Interface) server in the space provided. The CTI server monitors events on all phones (i.e. on / off a call).

   Where multiple servers are required, separate each with a comma. For example: cucm.company.com, cucm.othercompany.net.
Creating an Account with OnEsna

OnEsna credentials provides a web-based authentication solution for sites where Google Plus, Gmail and Salesforce are not used. Before attempting to login using Esna credentials for the first time, it is necessary to create an account with OnEsna.

2. Enter your email address at the login screen. If the system cannot find an existing account for that email, you will be prompted to create one. Click Yes, sign me up!

3. A confirmation email will be sent to that address to verify that the account is genuine.

4. In the email, click Confirm! and the link will take you to the login screen.

5. On the My Account screen, enter your corporate email address, your first and last names, and the password you want to use with OnEsna. Re-enter the password.
When finished, click **Create Account**.

OnEsna account setup is complete.
OnEsna.com

The OnEsna.com website allows administrators to monitor and adjust the usage of their iLink for Cisco Jabber licenses. Users can be added or removed from this site. Warnings will appear when the license has expired, and links are provided to renew the license when appropriate.

Open a browser and go to onesna.com, then login using administrator credentials.
Introduction

Google’s Chromebooks bring increased flexibility to users. The Cisco Web Communicator component is only compatible with the Windows and the Mac operating systems. This means that there is no connection between the Chromebook and the Cisco Call Manager and, therefore, voice and video calls are not possible with Chromebooks.

This chapter discusses the means to install and configure iLink for Cisco Jabber to restore the voice calling features to Chromebooks.

Caution: Video calls are not possible using Chromebooks. Only audio calling is supported.

Note: Internet Explorer and the IE Add-On are not supported on Chromebooks. Only the iLink for Cisco Jabber Chrome extension is available.

Pre-Requisites

Dialing from iLink for Cisco Jabber is facilitated by the Cloudlink server, which uses TAPI to create a connection to the Cisco system.

All calls are handled by the Cisco CUCM, with iLink for Cisco Jabber acting as a bridge to the Chromebook. The Cloudlink server must have a TAPI connection to the Cisco telephony system.
Procedural Changes

iLink for Cisco Jabber on Chromebooks works the same as it does on all other devices with the following changes.

Logging In

During login, there is an additional field on the Connection screen called iLink server.

In the iLink server field, enter the web enabled address of the Server. For example:

```
user.yourcompanyname.com
```

This will cause all telephone related traffic to be routed through the Server instead of through the Cisco Call Manager.

**Note:** This option will automatically appear on the iLink for Cisco Jabber login page when it is installed on Chromebooks. It will not appear on other devices.
Initiating Voice Calls

Channeling telephone calls through the Server does not allow calls to be received through a Chromebook; incoming calls are passed directly to your current telephone device. However, outgoing calls can be initiated through Chromebooks. These calls are directed by iLink for Cisco Jabber to CUCM, which routes the call to the device it has currently configured for that user. CUCM will direct the call to a softphone on another PC, or to a desktop telephone set.

1. Start the call normally using iLink for Cisco Jabber on the Chromebook. Open a contact and click the Call button, then select the number to dial.

The number can also be dialed directly by clicking Menu > Phone, then entering the number on the dialpad.

2. The request is routed from the Chromebook to CUCM through iLink for Cisco Jabber’s TAPI connection. CUCM then passes the call to the specified device (softphone or desktop phone).
3. An outgoing call is simultaneously placed to the contact’s number.
4. Once both parties have answered, the call is connected.

Depending upon the system settings, the default telephone device will immediately answer the call (through a speaker phone if available), or it may ring and wait for the user to answer.

**Hint:** iLink for Cisco Jabber’s interconnection with Salesforce is supported on Chromebooks. The browser click-to-dial functions will also be routed through the Esna Server to CUCM.

## Call Controls

When on a call, the controls for **Hold**, **Transfer**, and **Hangup** are available. Other call controls (i.e. keypad, transfer/join, mute) are not usable with Chromebooks and will not appear. Refer to page 121 of this document for details on using these commands.
Multimedia

The item under **Menu > Settings > Devices** to configure microphones, speakers, and cameras is removed when using Chromebooks since these are not supported. Selecting the default device on the presence menu remains the same.
Initiate a call from a Chromebook, then...

...the Esna Server bridges the call to CUCM using TAPI so that...

...Cisco Call Manager can call both the contact and the user’s default telephone devices.

Softphone or Desktop Phone rings

Calls are connected

Contact answers
Introduction

Jabra® make a series of USB and wireless telephony devices which are supported using iLink for Cisco Jabber. The Jabra hardware can be configured as the default device for iLink for Cisco Jabber, so when making a call, the Jabra device will be used to place the call. This allows the use of VoIP where available.

The configuration uses the Jabra Web Socket Service.

Installation

Pre-requisites

iLink for Cisco Jabber must be setup and operating before proceeding.

The Jabra devices will only work using iLink for Cisco Jabber on the Windows operating system. Macintosh systems are not supported.

An Internet connection is required.
Procedure

Before the Jabra device can be used with iLink for Cisco Jabber, the **Jabra Web Socket Service** must be installed onto the computer.

1. From with iLink for Cisco Jabber, go to **Menu > Settings > Devices**. Click **Jabra WebSocket interface** to install the extension into Windows.

2. When it has finished installing, under Windows **Control Panel > Programs and Features** the **Jabra Web Socket Service** should be present.

3. Reboot the computer to update the registry with the new program data.
Configuration

Once the Jabra drivers have been installed, iLink for Cisco Jabber must be configured to use the Jabra device for both audio input, recording, and making calls.

1. Plug the Jabra device into the computer’s USB port.
2. Go to **Menu > Settings** and open the **Devices** tab.

3. Enable the items for Jabra beneath both **Playback devices** and **Recording devices**.
4. To select Jabra as the default telephone device to use, click the presence strip at the top of the window. Select the Jabber telephone as the **Phone device**.

5. iLink for Cisco Jabber will return to the main page with the updated settings saved.

---

**Note:** When the default device is changed from the desktop to the Jabra USB telephones, the device icon beside your name changes to show the current setting.

- Desktop telephone as the default device = 📞
- Jabra USB telephone as the default device = 🎧

6. Close and restart iLink for Cisco Jabber to have the updates saved and made operational.

All calls that are made or received to the local extension will be passed through the selected Jabra device.
Call Controls

Call controls from the device itself are limited.

Placing a call can be done either through the iLink for Cisco Jabber dialer, or from the keypad of the device.

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

The keypad within iLink for Cisco Jabber also supports call transfer / join during the call.
iLink for Cisco Jabber and Gmail

Once the extension has been installed into the Chrome browser, iLink for Cisco Jabber functions can be accessed through the Gmail.

• From the main page in Gmail, hover the mouse over any listed contact in the From column. This will open the Contact Card for that person. Click the iLink for Cisco Jabber icon to open that person’s page in iLink for Cisco Jabber.

• Open an email and locate the sender’s contact details in the upper left corner of the message. Hover the mouse over the sender to open the Contact Card. Click the iLink for Cisco Jabber icon in the bottom right-hand corner of the Card. The iLink for Cisco Jabber page for that contact will open.
• Open an email and hover the mouse over the People Widget at the right side of the window. Click the iLink for Cisco Jabber icon in the bottom right-hand corner of the Card. The iLink for Cisco Jabber page for that contact will open.
iLink for Cisco Jabber 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:** iLink for Cisco Jabber provides support for both the Salesforce Classic view and the Lightning user interface. This chapter is for users of the Salesforce Classic interface. If you are using Salesforce Lightning, refer to chapter 9.

**Caution:** Salesforce and iLink for Cisco Jabber 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="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>
  <!-- Additional sections...
  ...
  ...

<callCenter>
Open CTI Integration

**Note:** By default, Chrome and IE will block pop-ups while browsing. iLink for Cisco Jabber, 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 iLink for Cisco Jabber 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 iLink for Cisco Jabber.

**Warning:** OpenCTI integration with iLink for Cisco Jabber 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 57.
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**.

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

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) to download the iLink for Cisco Jabber plug-in. Once that has been installed, you will have UC functionality available within Salesforce.
Logging in to iLink for Cisco Jabber

Using the extension with Salesforce requires the user to login using only Salesforce credentials.

1. At the login window, choose Salesforce from the menu.

2. 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 for Cisco Jabber the necessary permissions, click Allow.

   ![Login Screen](image)

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

3. Enter the server and user details as outlined in the Installing the Plug-in: Salesforce Classic Interface chapter of this manual.
   
   Click Connect when ready.
4. The extension has been added to Salesforce and appears in the left-hand pane.
Using Salesforce

When using the Salesforce plug-in with iLink for Cisco Jabber, 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 Jabber 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 Jabber 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.

---

**On Inbound Calls**

Upon receiving a call, iLink for Cisco Jabber 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 Jabber does not open a contact record. When the number is clicked within Salesforce, iLink for Cisco Jabber 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-to-Dial feature in Salesforce](image)

**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.

![Calling from Chatter](image)
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 Jabber 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.
INSTALLING THE PLUG-IN: SALESFORCE LIGHTNING INTERFACE

Salesforce Lightning Integration

iLink for Cisco Jabber 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: iLink for Cisco Jabber provides support for both the Salesforce Classic view and the Lightning user interface. This chapter is for users of the Salesforce Lightning interface. If you are using Salesforce Classic, refer to chapter 8.

Caution: Salesforce and iLink for Cisco Jabber 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. iLink for Cisco Jabber, 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 iLink for Cisco Jabber 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 iLink for Cisco Jabber.

**Warning:** OpenCTI integration with iLink for Cisco Jabber 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 71.
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](https://chrome.google.com/webstore)) to download the iLink for Cisco Jabber plug-in.

Once installed, the client will have UC functionality available within Salesforce.
Logging in to iLink for Cisco Jabber

Using the extension with Salesforce requires the user to login using only Salesforce credentials.

1. At the login window, choose Salesforce.

2. 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 for Cisco Jabber the necessary permissions, click **Allow**.

   ![Login screen](image)

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

3. Enter the server and user details.

   Click **Connect** when ready.
4. The extension has been added and the user has logged in to Salesforce. All phone numbers displayed on screen have a Click-to-Dial icon beside them. Click to place a call to that contact. A button in the bottom left corner of the window, when clicked, will open the iLink for Cisco Jabber plug-in.
Using Salesforce

When using the Salesforce plug-in with iLink for Cisco Jabber, 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 Jabber 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 Jabber 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 an call, iLink for Cisco Jabber 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 Jabber does not open a contact record. When the number is clicked within Salesforce, iLink for Cisco Jabber 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 for Cisco Jabber 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**.

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**.

6. Click **Save**. The filter will be created, and then applied to the contact list.
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.
10 OFFICE 365 INTEGRATION

Introduction

Once the iLink for Cisco Jabber Extension has been installed into the web browser, contacts can be reached through the Mail tab of Office 365.

Login with Office 365 Credentials

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

1. Launch iLink for Cisco Jabber and choose Use Office 365 credentials.

Enter your Office 365 credentials at the prompt to login to iLink for Cisco Jabber.
2. Launch Office 365 and login normally.
Mail

The iLink for Cisco Jabber contact screen can be accessed from the Mail panel of Office 365.

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

2. Open an email message, then click the contact’s name or picture in the right-hand pane. This opens the person’s contact card.
3. Click the icon 📈 to open iLink for Cisco Jabber at this contact’s Actions page.

4. From the available options, select how you would like to interact with this contact. Click here for more information on the available Actions.
Introduction

Once the iLink for Cisco Jabber Extension has been installed into the web browser, you can connect to an existing Skype for Business account.

Pre-requisites

You must have a Skype for Business account already setup and working. This can be either through the web service, or an on-premise Skype server.

Logging In

To use Skype for Business, you need to login to iLink for Cisco Jabber and specify that the IM/Presence Server to use is Skype. At the login screen, select one of the Skype options from the IM/Presence provider field. Choose either Skype Online if you are using the web based platform, or Skype On-prem if you have a Skype server on-site.

Enter your Jabber username and password, then click Connect. You will be prompted to login using your Skype/Microsoft credentials. Enter your details and click Sign in. When iLink for Cisco Jabber launches, it will read your contacts from Skype for Business so you have easy access to them at all times.
Limitations

Not all Skype functions are supported when using iLink. The following Skype features are available in iLink.

- All calls are placed through iLink.
- Skype directory search.
- Presence - monitoring & changing.
- Peer-to-peer chat.
- Group chat.
Introduction

iLink for Cisco Jabber offers a Chrome extension that allows for integration into Microsoft Teams. Access all iLink for Cisco Jabber features from within the Teams workspace.

Set-Up

The iLink for Cisco Jabber extension must be added to your Chrome Web browser before it can be used. Teams integration is included with the Chrome extension. See page 23 for complete instructions on adding the extension to Chrome.

When finished, the iLink for Cisco Jabber icon appears to the right of the address bar.

Close all tabs in Google Chrome and relaunch the browser to complete the installation.
Using iLink for Cisco Jabber with Microsoft Teams

Once the Chrome Extension has been installed, the iLink for Cisco Jabber icon will appear on contact cards within Microsoft Teams. Clicking this icon will open the iLink for Cisco Jabber interface. Launch Microsoft Teams to continue.

Contact Card

In the Chat or Teams windows, hovering the mouse over a person’s picture brings up the contact card for that person.

Across the bottom of the card are a set of action icons including iLink for Cisco Jabber.

Click the icon and the iLink for Cisco Jabber window opens at the selected individual’s page.

Start a chat session with the selected contact, place a call, or choose another Action.
When using Cisco Expressway

If your corporate site uses the Cisco Expressway platform, it imposes some limitations on iLink for Cisco Jabber users that are connecting from outside of the local network (e.g. traveling, connecting from a remote office, working from home, etc.). Once the user returns to the office and logs in to the local network again, these limits are removed.

Links to additional resources for setting up and configuring the Cisco Expressway environment can be found at the end of this chapter (click here).

Limitations on External User Connections

When connecting to a corporate network from an external site, presence details (availability, location, etc.) are not supported through iLink for Cisco Jabber if the site also uses Cisco Expressway.

During login, as the program tries to connect to the network, you are presented with an option notification. Selecting Connect to phone services only will load iLink for Cisco Jabber with only the dialer functions enabled. The program will launch directly into the dialpad.

The program will not complete the login process until you click this option or cancel.

Click Cancel to close the program without connecting.
Your Favorites group will not be available. Presence items, such as your availability and location, will not appear.

With **Phone services only** selected, users can still conduct searches for contacts. iLink for Cisco Jabber will search through the user’s Gmail or Office 365 directories, depending upon which credentials were used to login. The Cisco directory will not be available.
Additional Resources

For assistance in setting up Cisco Expressway in a corporate environment, the following links are provided to Cisco's own documentation.

Expressway Configuration Guides

This is the Cisco documentation web site. All other documents referenced below can be found here.


Basic Expressway Configuration Guide


Creating Certificates


SIP Trunk Deployment Guide


Configuring Mobile Remote Access

**Introduction**

*Note:* By default, Chrome will block pop-ups while browsing. iLink for Cisco Jabber, 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 plugin.

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

**The Main Screen**

The is the starting point for all interactions within iLink for Cisco Jabber. 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.

- Search the contact list
- Presence Management
- Favorites
- Groups
- Menu Options

From any location within the program, clicking on the icon 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 you are currently subscribed to as Favorites. These are your most frequently used contacts. All other people in the database are available through the *Search* bar.

**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
  frank.sinclair@st_johns.edu

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. A list of numbers to call will be displayed.

Click the appropriate number to place the call using your default device.
Contact Options

Click on the button beside a contact to view more options.

- Use **Clear History** to remove all archived entries for this contact. These include records of chat sessions, timeline entries, and telephone conversations. The contact will remain on your Favorites list.

- The **Groups** icon allows you to add this contact to an existing collection. Refer to the section on **Groups** for more information.

Contacts that do not appear in your **Favorites** list can be subscribed to.

- Click **Subscribe** to add this contact to your Favorites list.

- If this contact is already in the Favorites list, click **Remove** to delete their entry. The contact is not removed from the contact database. It is only removed from your Favorites list or any groups.
Presence Management

The bar across the top throughout the application allows you to modify your current availability and default telephone device. Share with everyone in your contacts list your status and whether or not you are free.
Click in the presence bar at the top of any page.

Presence

From this pane, you can set your availability and enter a location.
**Presence label:** In the space provided, enter the text that you want to appear beside your availability tag in the presence bar. This value will be seen by other contacts using the extension.

- **Available:** Enabled by default, click this icon to show other users that you are able to take calls and join chat sessions.
- **Away:** Select this option to show that you are away from your desk or on the phone.
- **Unavailable:** Enable this option to show others that you are not to be disturbed at the moment, and that they should try again later.

**Caution:** These settings affect the display of your status bar only. No additional call routing is provided.

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

Phone device

Use this field to set your current telephone device from the list of those available. Incoming and outgoing calls will be made through the selected device.

- Software enabled telephone that places calls through the computer and network/Internet connection.
- Hardware / desktop telephone.

**Note:** These devices are configured by the administrator on the system hardware. All options may not be available at all sites.
Descriptive Device Labels

By default, most telephone sets will be identified by a prefix (e.g. SEP for desktop telephones, CSF for softphones), followed by the MAC address of the device (i.e. SEP1234567890AB). This is not descriptive of the telephone, and does not say who it belongs to or where it is situated.

To give the device a descriptive name, the administrator can open CUCM and provide a description for the device that will appear within iLink for Cisco Jabber. The traditional identity will appear in parentheses after the descriptive label (i.e. Bob’s Desk Phone (SEP1234567890AB)).

Favorites

This screen is the starting point for all interactions within the application. It shows all of your subscribed contacts. Contacts that are not shown in the Favorites list are still available through the Search field. Click here for more information on subscribing to contacts.

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

Click for further details on the tabs:

- Messages
- Call
- Actions
Messages

To send a text chat message to the contact, type the message into 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 and scrolling up as new messages are received.

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 where you place telephone calls to the contact.

On the Call tab, all telephone numbers and extensions associated with the person are displayed. Click on one to place the call. Your current default telephone device will ring and you will be connected to the contact at the chosen number.

**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.

Group chat

A Group chat session occurs when more than 2 people are involved in the exchange. You will be asked to create the list of contacts to invite.

1. The current contact has already been added to the list. In the Search bar, enter the name of an additional contact to invite to the chat. The program will display all matching names. Click the plus sign to the right of the person’s name to include them in the session. To remove someone from the list, click the trash can beside their name.

2. Each invitee will notice a flag beside the extension icon in the address bar, and a flashing dot will appear in the program to alert them to the incoming message.

3. When all contacts have been added, click OK to start the meeting.

Note: All participants to a group chat session can read all messages and post new messages to the group.
4. Once the group chat has begun, additional people can be brought in by clicking the **Invite people** icon.

WebEx / Spaces

Launch a WebEx meeting or an Spaces event from the **Actions** tab. If there is a chat session currently in-progress, it will continue during the event.

Cisco’s WebEx and Avaya Spaces are applications that can be used to setup larger meetings, and can include desktop and program sharing, whiteboards, and audio / video conferencing. These applications are launched within a browser, but they may require additional licensing, extensions or plug-ins to be installed.

**Note:** The iLink for Cisco Jabber application must also be installed if WebEx meeting support is required. Avaya Spaces must be installed if Spaces support is required. If these are not installed, then these icons will not appear in the program.

1. **Select WebEx** or **Spaces**.

**Note:** Where appropriate, the necessary licenses for each program must be purchased separately.
2. For the person who started the WebEx event, iLink for Cisco Jabber 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 chat window and email. The invitation includes a link to join the meeting.

**Launch WebEx meeting**

**Send link to contact**

**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 before it will appear in the list to share.

Once shared, the contact will receive a link in their chat window that will take them to the document. The contact 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.

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 iLink for Cisco Jabber). Click on the desired page to send the contact 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. The contact will remain on the Favorites list, or in a group is assigned to one.

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.

Click the radio button beside the group you want to move the contact into. Only contacts you have subscribed to can be added to a group. The Favorites group is embedded in the application and cannot be deleted.

Note: A contact can only belong to a single group at one time. Assigning a contact to a new group will remove them from an older one. Favorites is considered to be a group.

Subscribe/Remove

Click this icon to add a contact (Subscribe) to your Favorites group.

If they have previously been subscribed to, click Remove to delete them from your list.

The contact's details will remain in the database, but they will no longer appear in the extension except through a search. A contact can be subscribed to again at any time.
Groups

Large lists of contacts can make it difficult to find the one you are looking for. 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.

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

**Note:** Each contact can only belong to a single group at one time. Putting a contact into a new group will remove them from the old one.

Add group

Select Add group to create a new collection of 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 contacts within.

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

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 a contact has been located, click the Add icon to the right of the person’s name to add them to the group. If that person is currently in a different group, they will be moved here.

• Click the trash can to the right of the contact’s name to remove them from the group. The contact will also be removed from your subscribed list.

Note: A search will also find any matches in the current group. Since those contacts are already in the group, the delete button will appear instead of the add button.

• Click the trash can to the right of the contact’s name to remove them from the group. The contact will also be removed from your subscribed list.

Note: Contacts from deleted groups, and contacts removed from a group, are also removed from your list of subscribed contacts. However, they remain in the database. To recover the contact, run a new search and re-subscribe to return them to the Favorites group.
Actions

Under the **Group Actions** tab you can connect with all members of the chosen group through the selected channel.

- **Chat** button 🆘 to create a group chat with all members of the collection. All members of the group are automatically included, but you can add and remove participants before starting the session. 
  When ready, click **OK** to start the group chat.

- **WebEx** 🌐 will open a browser window and launch a WebEx event. All members of the group are automatically included, but you can add and remove participants before starting the session.
When ready, click **OK** to send email invitations to each listed contact.
**Menu**

The Menu button at the top of the screen provides instant access to your chat and telephone archives. It also give access to program configuration items so you can customize your experience.

**Settings**

Use the options under **Settings** to configure the program to work the way that you do. Specify your default telephone device, and which audio and video hardware to route traffic through when using a softphone.

**Devices**

The Devices tab is where the various hardware devices are chosen. Enable one option from each listed category to configure your user experience.

*Note*: Hardware devices must be installed and connected to the computer or they will not appear in the list.

These settings are applied to a softphone when configured by the administrator. When you are using a desktop telephone or a Jabra handset, these settings do not apply.

**Playback devices**

Select which set of speakers to use when listening to telephone and video conversations (i.e. desktop speakers or headphones).
Recording devices

Recording devices allows you to pick the microphone to use when on a call (i.e. headset mic or built-in to a webcam).

Capture devices

This options shows the webcams currently connected to the computer. The chosen device will be used for all video functions.

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.

Calls

This section of Settings allows you to configure how the program handles incoming and outgoing telephone calls and alerts.

• Autoanswer when available, on incoming calls, will cause your default telephone device answer the call, if possible, after several seconds if you are Available. On a desktop telephone, if the handset is still on the hook, the call will be answered by the speakerphone.

• When this option is enabled, Start video automatically will use your local capture device to transmit a video signal with the call. The call recipient will be able to see your video stream. If they also have video enabled, you will see their stream on your monitor.

• The Publish on the phone status option determines whether or not other people using iLink for Cisco Jabber will see when you are on the phone. This appears beside your name in the Favorites list, and may be included with notifications.

• Enable the E.164 dialing option to have telephone calls formatted using this international system.

Phone recognition

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

• The administrator will configure the values for Area code and Country code on the server, and those values will be displayed here. 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 as entered (e.g. 7079700).
Integration

Integration controls how iLink for Cisco Jabber interacts with your other applications.

- **Enable Google calendar** to allow iLink for Cisco Jabber to update your presence using the entries in your calendar. For example, if a meeting is scheduled in Google Calendar, your presence in iLink for Cisco Jabber will be changed automatically to Away, Meeting at the correct time to reflect your status.

- **Embed to all opened pages** will add the iLink for Cisco Jabber 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 learning 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

This section covers how the application alerts you to changes. 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 generated with any:

- **Online status change** - the contact logs into or logs off from iLink for Cisco Jabber.
- **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 the contact starts and ends a telephone call.

Logout

This item will terminate all functions and disconnect you from the program. You will be returned to the login screen.

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. Both Group and person-to-person sessions are included.

Active

Displays all currently active chat sessions. A chat session will be moved to the Recent folder if it has been inactive for a period of time.

Recent

Recent text chat sessions are stored here. After a period of inactivity, existing Active sessions will be moved to this folder. The Recent archive will hold inactive chat sessions for some time after which they will be removed from the system.

Click on any Active or Recent session to reconnect with that person.

Start Conversation

The Start conversation button is used to create a new chat session. You will be asked to select the contact(s) to invite. This will automatically become a Group Chat if more than one contact is selected.

Click OK to start the chat session. Invitees will receive a notification through iLink for Cisco Jabber chat that they are requested to attend.

Note: The search function will only find contacts that you are subscribed to. Unsubscribed contacts cannot receive chat requests.
Collaboration

A document that is stored on Google Drive, and that is 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 invite everyone that it was shared with to a group chat session, or a WebEx meeting. Click on one of the Collaboration Action options to start the selected event with all contacts who had the document shared receiving an invitation through iLink for Cisco Jabber (for Chat), or through an email (for WebEx).

![Collaboration Image]

**Note:** You must be subscribed to a contact for them to receive an invitation. Contacts that you have not subscribed to will not receive the invitation even if they are on the document’s shared list.

Phone

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

Displays all ongoing (Active) telephone conversations. Click on a call to view the Call Controls.

Recent Calls

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

- **Contact name (and # of calls)**
- **Contact number or extension**
- **Date and time of call**
- **Answered/Not Answered**
- **Call duration**
- **Other contact numbers**
- **Call not answered**

The Recent archive will hold call details for some time, after which they will be removed from the system.

Click on any Recent entry to reconnect with that person. Click the contact to place a call back to the listed number, or click the arrow to choose the number to call for that contact.
Dialpad

Use the **Dialpad** to place a new 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 current default telephone device.
Call Controls

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

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

The keypad within iLink for Cisco Jabber also supports call transfer / join during the call.

- **Put on hold** will pause the call, muting the microphone and allowing another call to be placed.
- When **Transfer/Join** 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.

- or -

Once the call has been answered, click **Complete join** to conference together all three people.

More contacts can be added as required.

- **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.

- Click **Complete Join** after the second call has been answered to add the another person to an active call. The Complete Join icon will not appear until the other person has answered the call.

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

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

- **Start Video** will create a video link for the call. Both parties must click this button, and both must be equipped with video capabilities, before the connection will be made. This item only works for the softphone.

You can navigate away from the Call window without interrupting the call.

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**Warning:** When viewing iLink for Cisco Jabber on a virtual machine using Windows Terminal Services, video calling is not supported by the operating system. The audio feed and other calling features work properly.
Click-to-Dial

On web pages that contain telephone numbers, iLink for Cisco Jabber 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 for Cisco Jabber.
Introduction

This chapter shows how to use some common features of iLink for Cisco Jabber.

Included are:

- Placing a call.
- Transferring a call.
- Conference calls.
- Working with Messages.
- Group Chat.
- Convert a Chat Session into a WebEx Event.
Placing a call

A telephone call to a contact from iLink for Cisco can be started from several locations within the program.

Main Page

1. On the **Main Page**, locate a contact to place a telephone call to.
2. Click the telephone icon next to the person’s name.

3. From the list of possible telephone numbers and extensions displayed, choose one to place a call to the contact.

4. Your currently selected telephone device will ring. Answer the call and the program will dial the chosen number and make the connection.

**Note:** It is not necessary to add any digits to reach an outside line. The system will add the appropriate codes where required.
Phone Page

1. From the main window, go to **Menu > Phone**.

2. **Optional**: Your currently selected device is displayed at the top of the window. If necessary, click on this space and select a different device from those listed.

   **Note**: The devices available to an account are setup by the system administrator.

3. In the space provided, enter the extension or the telephone number to call, or use the number pad.
4. A selection icon appears to the left of the number entered showing the number of matches for the number. Click the icon to display the list, then click on a number to place the call.

- The first number has been formatted by the system according to built-in dialing rules. It may add +1 for a long distance number, and identify the area code. Any additional codes required to place the call using an outside line will also be added to the number automatically.
- The second option will dial the number as entered. As an extension, the system will not add any additional codes to use an outside line. The number is assumed to reside within the company telephone network.
- The last item dials the number as entered, but will attach any additional codes required to access an outside line. This number is not a part of the company telephone network.

5. Click the Dial button to place the call. Your currently selected telephone device will ring. Answer the call and the program will dial the chosen number and make the connection.

Note: It is not necessary to add any digits to reach an outside line. The system will add the appropriate codes where required, although they will not be displayed.
Contact Page

1. While viewing a contact’s details, click the **Call** tab to see the list of numbers associated with that person. Click one to place a call to that number.

![Contact Page](image)

2. Your currently selected telephone device will ring. Answer the call and the program will dial the chosen number and make the connection.

   **Note**: It is not necessary to add any digits to reach an outside line. The system will add the appropriate codes where required.

Transferring a call

Any currently active call can be sent to another number using the **Call Control** features of iLink for Cisco Jabber.

**Call Controls** appear in the window **during** a telephone call.

1. To send the call to another number, during the call, click **Transfer/Join**.
2. The current call will be placed on hold and you will be prompted to select another contact or enter a number to pass the call to. Search for the contact, select one from the Favorites page, or enter the number / extension on the dialpad.
3. Once the second calls starts to ring, click **Complete Transfer** to pass on the call to the new number.

![Transferring a call](image)
Conference calls

Any currently active call can become a conference call (more than 2 participants) using the Call Control features of iLink for Cisco Jabber.

Call Controls appear in the window during a telephone call.

1. To create a conference call during an active call, click Transfer/Join.
2. The current call will be placed on hold and you will be prompted to select another contact or enter a number to pass the call to.
   Search for the contact, select one from the Favorites page, or enter the number / extension on the dialpad.
3. Once this call has been answered, the Complete Join option appears which allows you to create a conference call between yourself and both of the other contacts.
4. Steps steps 1-3 can be repeated to add other contacts to the call.

**Note:** The Complete Join icon will not appear until the other person answers the call. Until then, only Complete Transfer is available.

**Hint:** To cancel the join before the new contact answers, or to return to the conference call if the person does not answer, use the Cancel transfer/join icon.

**Additional contacts can be added to the conference call in the same way.**
Working with Messages

*Messages* provides text chat support directly from within the program.

1. To start a chat session with a contact, locate the contact on the main page.
   
   Click on the contact to open the details page.

2. On the *Messages* tab, enter a text message in the space provided at the bottom of the window. Hit *Send* to transmit the message to the contact.

   The message will appear in the top part of the window, tagged with your picture (to the right) and the time the message was sent. The responses from the other person are also displayed with their picture (on the left) and the time of the reply.
Group Chat

A **Group Chat** session occurs when more than 2 people are involved in the exchange.

1. To start a Group Chat, select a contact to include in the session.
2. From the Actions tab, click **Group chat**.

3. The selected contact has already been added to the list. In the **Search** bar, enter the name of an additional contact to invite to the chat. The program will display all matching names.
Click the plus sign to the right of the person’s name to add them to the session. To remove someone from the list, click the trash can beside their name.

4. An invitation will be sent to the new participant. When they accept the invitation, they will be added to the chat session.

Note: All participants to a group chat session can read all messages and post new messages to the group.

5. Once the group chat session has begun, additional people can be brought in by clicking the Invite people icon.
Convert a Chat Session into a WebEx Event

A chat session can be escalated into a WebEx meeting. The chat session will continue during the event.

1. While in a chat session, open the Actions tab. Select either Spaces or WebEx to launch the appropriate app.

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

2. For the person who initiated the move to, the program will automatically launch the appropriate application to host the meeting.

   All other participants will see a link to the event in the chat window. If a password / PIN is required to access the meeting, it will also be included in the link.

   Everyone currently in the meeting will also receive an email invitation which includes links to the event site and any security details.
## APPENDIX A: REVISION HISTORY

<table>
<thead>
<tr>
<th>Date</th>
<th>Issue</th>
<th>Change Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 July, 2018</td>
<td>10.7 (1)</td>
<td>• Initial document release under the Esna iLink brand.</td>
</tr>
<tr>
<td>2 April, 2019</td>
<td>10.7 (2)</td>
<td>• Removed references to Google Hangouts.</td>
</tr>
</tbody>
</table>