VIP™

for Microsoft® Outlook®

Setup and User's Guide

ALSO COVERS:
VIP Professional
VIP PC Attendant Console
VIP ACD Agent
VIP Softphone

0450-0513
Rev. N

esi

We Make It Easy To Communicate

Contents

About ESI

*ESI (Estech Systems, Inc.) is a privately held corporation based in Plano, Texas. Founded in 1987, ESI designs and builds innovative telecommunications products for businesses like yours. Because of their powerful combination of value and features, ESI products are consistently recognized by industry publications and leaders. Visit ESI on the Web at **www.esi-estech.com**.*

Introduction

Combining the advanced capabilities of your ESI phone system with the power of *Microsoft*® *Outlook*®, **VIP** (**V**isually **I**ntegrated **P**hone)™ from ESI provides advanced call and message handling for today's business customers. *VIP* takes *Outlook*'s powerful applications **and** adds the missing critical application: **control of your telephone and voice mail.** *VIP* lets you intelligently do the following, and more:

• **Manage your telephone calls** — Handle incoming and outgoing calls to your station[1], in conjunction with various ESI system features.

• **Manage your voice mail** — View your voice and e-mail messages, live call recordings, and personal memos in one *Outlook* Inbox; prioritize each message by importance; and select for playback voice mail messages, in any order. (Voice messages can be viewed in a special voice mail-only folder within *Outlook*, instead of the Inbox, allowing greater manageability.[2]) You also can restore deleted voice mail messages.

• **Manage your faxes** — View, in privacy, your faxes received from fax servers.

• **Manage your contacts** — Keep your contacts in a central location, including *Outlook* Contacts, Station List, Company Speed-Dial List, Remote Location List[3], and the *VIP* Quick Contact List.

• **Log all your inbound and outbound calls** — View and print a history of your station's call activity.

• **Program your phone** from your PC, including presence settings if your system has ESI Presence Management.

VIP Professional

Your *VIP* installation **may** include *VIP Professional*, which includes all the features mentioned above, and adds these:

• **Enhanced graphical user interface (GUI)** — With *VIP Professional*, the *VIP* Quick Contact List shows station status at a glance, using the same colors that appear on station keys on ESI Feature Phones — red for busy, and orange for DND (do-not-disturb) mode. Additionally, *VIP Professional* provides user-friendly interactive screens that help even a novice user use it almost immediately.

• **Text-messaging** — *VIP Professional*-enabled employees have this additional, advanced communications option, which is much more convenient and less intrusive than either public-address paging ("overhead paging") or the phone system's background announce feature when one must be alerted of an incoming call or the arrival of a visitor in the lobby. Unlike other instant messaging (IM) applications, *VIP Professional*'s text-messaging feature resides entirely within your network to protect you from viruses and "spim" (spam over IM).

• **Auto record** — This optional capability of *VIP Professional* is for those who want the system to record **all** of their conversations, automatically. As each recording occurs, the user manages it as he/she wishes, using the easy *VIP Professional* interface. Later, recordings can be archived and attached to e-mails.

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[1] Your phone. In this and other ESI user documentation, we will use the term *phone* and *station* interchangably. To be precise, *station* doesn't necessarily mean the same as *phone*, but it's easier to understand the concept that way.

[2] If you keep large numbers of items in your *Outlook* Inbox and/or run in a *Windows Exchange* environment, ESI recommends using this voice mail-only folder for better performance.

[3] Cabinet number only.

VIP PC Attendant Console

VIP PC Attendant Console[1] is a PC-based, on-screen console designed to meet the particular needs of a phone system attendant. "Multitasking" takes on a whole new meaning with *VIP PC Attendant Console*, which lets the attendant perform multiple call-handling tasks simultaneously, and more easily than ever before. *VIP PC Attendant Console* provides all the same functionality as *VIP Professional* plus:

• An **expanded Call Display** that shows Caller ID of all incoming calls to the attendant department, as well as all calls on system-wide hold.

• A separate **Virtual Button Window** that lets the attendant program up to 200 virtual DSS buttons, arrange them in folders, and sort them by name, number, or label color.

VIP ACD

VIP ACD comes in two varieties — *VIP ACD Supervisor* and *VIP ACD Agent* — and share all of the *VIP Professional* feature set, plus:

• *VIP ACD Agent* shows the status of fellow agents.

• *VIP ACD Supervisor* shows real-time department performance, on-screen agent status, and built-in management reports (including the ability to create custom reports.)

> **Note:** VIP ACD Supervisor has its own Setup and User's Guide (ESI # 0450-0986)

VIP Softphone

VIP Softphone[2] combines the capabilities of an ESI IP Feature Phone II and *VIP Professional* in a unified PC application:

• A **Virtual Button Window** for color-coded access to 30 virtual DSS buttons, each of which can be programmed for an extension, voice mailbox, department, or speed-dial number.

• A **zero-footprint phone**, since only a PC (desktop or laptop) is required.

• **USB handset support**, which allows more natural speech as compared to the use of a standard PC sound card.

> **A note about *"VIP Professional*-compatible applications":**
>
> As you have seen, there are several *VIP* applications which share the *VIP Professional* feature set. Therefore, for the sake of brevity, we refer throughout this document to "*VIP Professional*-compatible applications." These include *VIP Professional*, *VIP PC Attendant Console*, *VIP ACD*, and *VIP Softphone*. While this *User's Guide* doesn't cover *VIP ACD Supervisor*, many of the comments using this terminlogy will apply to that application, too, and not just *VIP ACD Agent*. (However, in cases involving specific application parameters concerning a *VIP ACD* application, you may assume we are referring to *VIP ACD Agent*.)

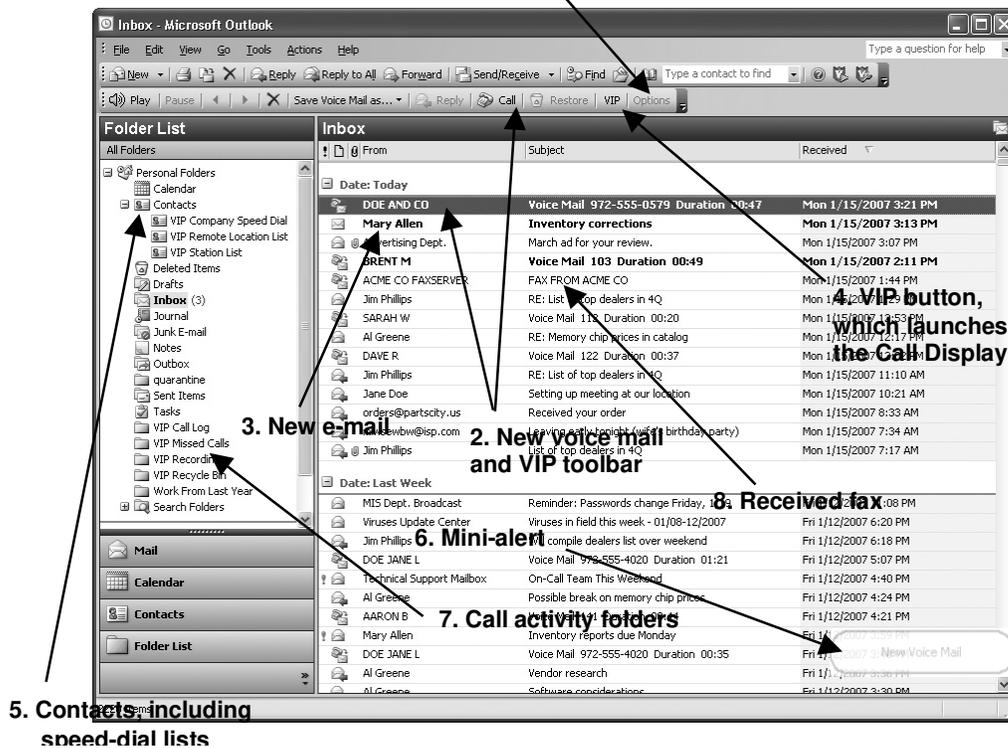[1] Previously called *ESI PC Attendant Console*.
[2] Available for use with only ESI Communications Servers, as well as the earlier version of the ESI-600 if it's running system software version 16.1.*x*.

VIP: An overview

> **Note:** This section gives you a **high-level overview** of *VIP*'s features. For greater detail, refer to the
> **individual feature descriptions** later in this *Setup and User's Guide*.

You access *VIP*'s features through the familiar *Outlook* interface. This gives you a quick and convenient
way to manage your calls and contacts, along with the *Outlook* features with which you're already
familiar. The following illustration describes *VIP*'s features:

1. Options button, which sets *VIP* configuration and preferences

4. VIP button, which launches the Call Display

3. New e-mail

2. New voice mail and VIP toolbar

8. Received fax

6. Mini-alert

7. Call activity folders

5. Contacts, including speed-dial lists

1. The **Options** button on the toolbar launches a separate window where you can update your station
   (extension) number, mailbox password, the NSP IP Address, and port number.[1] You can also
   access other standard *Outlook* options, as well as customization options for the *VIP* Call Display
   (see page 4), from this button.

2. In the *Outlook* **Inbox** shown above, a new voice mail appears in the list, along with the name and
   number information (Caller ID[2]), message duration, and date.

   Because the message is highlighted, the *VIP* toolbar is active, letting you **Play**, **Delete**, and **Save**
   the voice mail. You can playback the message through the speaker (or handset, if it's off-hook) of
   the ESI 48-Key Feature Phone associated with the voice mailbox.

   You also can return the person's call (if the Caller ID data is available).

   The VIP Advantage: You can view all your messages at once and choose which ones to play.

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[1] For network information, contact your ESI Reseller or System Administrator.
[2] If you have subscribed to Caller ID service from your telephone service provider.

3. E-mails will appear in the Inbox, as they normally do.
The *VIP* advantage: Now, both E-mails and voice mails appear in
a single location for more efficient handling.

> **Note:**   If desired voice messages **can** be viewed from a voice mail-only
> folder (as shown, *right*), keep voice mail and e-mail separate.
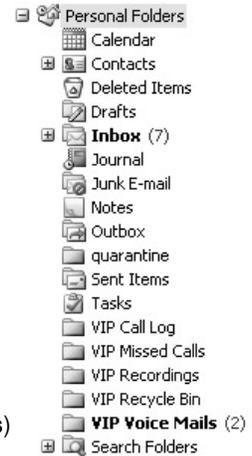
4. The **VIP** button on the toolbar launches the **Call Window** (shown below).
You use this window to make inbound and outbound calls, and to access
other common call-handling features you normally use on your ESI phone.
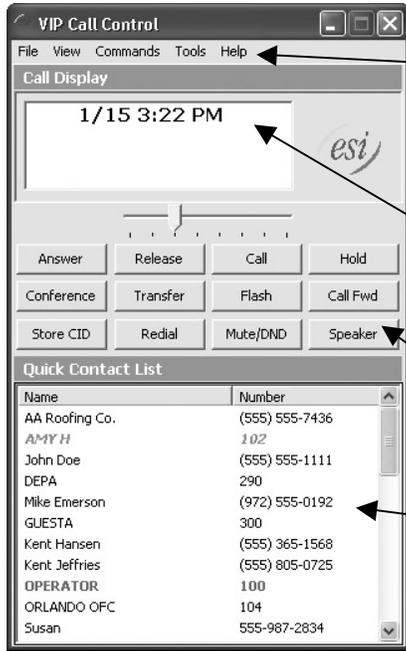
The **menu bar** contains the remaining
call-handling features (under **Commands**)
aren't displayed on command buttons.
You'll also find user help and user phone
programming, along with other customization options, under
Tools on the menu bar.

The **call status display** shows a variety of states, such as: date
and time (when your station is idle/on-hook); Caller ID; call
forward, etc. It also changes to a data entry field so you can type
in a phone number to call.

The **call command button area** shows up to 20 buttons, 16 of
which you can remove and/or replace with other call features.[1]
The four remaining buttons (top row) are permanent and can't be
removed or replaced.

The ***VIP* Quick Contact List** is a list of names you add by
dragging-and-dropping names from your *Outlook* Contacts and
speed-dial lists. Once the list is populated, you can scroll through
the alphabetical *VIP* contact list, highlight the name, and double-
click to place a call to that person.

The *VIP* advantage: Call-handling is a mouse-click away.

5. The **Contacts** folder includes *Outlook* Contacts and up to
three different *VIP* lists: Company Speed Dial, Remote Location
List[2], and Station List. The lists will automatically populate the
first time you install *VIP*. The *Outlook* **Contacts** folder remains
the same, containing a list of personal contacts. In addition,
VIP provides you with up to three different speed-dial lists:

- **Company Speed-Dial** — All system speed-dials
  (*600-699* numbers) on the system.[3]

- **Remote Location List** — All location numbers on the system.[4]

- **Station List** — All stations (extensions) on the system.

The *VIP* advantage: having a list of personal contacts,
employee contacts, pre-programmed speed-dial numbers,
and location numbers in one place in your *Outlook* menu.

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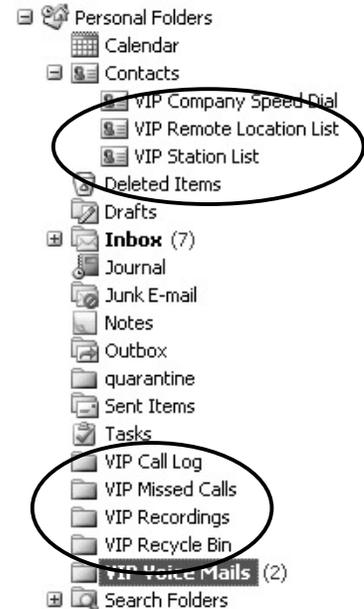
[1]   With *VIP Professional* and *VIP PC Attendant Console*. Otherwise, there are up to 12 buttons, with eight customizable.
[2]   Lists only Esi-Linked cabinets (*i.e.*, **not** remote extensions). For more information, consult your System Administrator.
[3]   Available only if either the Installer or the System Administrator has set up a System Dex.
[4]   Available only if your system is using Esi-Link. For more information, consult your System Administrator.

6. The **mini-alert** is a small "bubble" that appears in the lower right-hand corner of your screen to provide you with a variety of information. You can perform the following actions when the mini-alert appears:

- **Incoming call** — Click the Caller ID information. This takes you to the Call Display, where you can handle the call.

- **New voice mails messages or e-mails** — Click *New E-mail* or *New Voice Mail*. This takes you to the *Outlook* Inbox, where you can view your messages.

- **Missed calls** — Click *New Missed Call*. This takes you to the **VIP Missed Calls** folder in *Outlook*, where you can view a list of those calls.

The *VIP* **advantage:** Without having to take your eyes off your work on-screen, you can make a quick decision whether to (a.) pick up the call or (b.) keep working and let the caller be transferred automatically to your voice mailbox.

7. The **Call Log**, **Missed Calls**, **Recordings**, and **Recycle Bin** folders, all of which automatically populate, require no maintenance, and contain specific information:

(a.) **Call Log** contains a viewable, printable list of incoming, outgoing, and transferred calls associated with your station. You can also place an outbound call if the call record provides Caller ID data.

(b.) **Missed Calls** contains an ongoing list of missed calls from your station. You can place an outbound call if the specific missed-call record provides Caller ID data.

(c.) **Recordings** contains recorded calls and "personal memo"-type recordings made from your ESI Feature Phone.

(d.) The **Recycle Bin** contains the last 10 voice mail messages that you deleted. You can play a deleted message from the Recycle Bin or restore it to your Inbox.
As with Call History and Missed Calls, you can place an outbound call from the Recycle Bin if the record provides Caller ID data.

(e.) The **Voice Mails** folder can be created. It will allow you to access voice messages while keeping them separate from e-mails.[1]

8. Faxes — *VIP*'s fax server integration lets you receive, view, print, and save faxes from *Outlook*. **The** *VIP* **advantage**: Combines the advantages of receiving faxes privately via fax server with the ease of using *Outlook* and *VIP* to view them.

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[1] If you keep large numbers of items in your *Outlook* Inbox and/or run in a *Windows Exchange* environment, ESI recommends using this voice mail-only folder for better performance.

Overview example: Using *VIP*

> **Note:** Phone system features mentioned below are explained in detail later on in this manual, as well as in your ESI phone system's specific documentation. Visit *www.esiusers.com* for more information.

When opening *Outlook* (after having installed either *VIP*, *VIP Professional*, or *VIP PC Attendant Console*), click the **VIP** button on the *VIP* toolbar to launch the Call Display so you can make or receive calls.

Let's say that a call comes in. When your phone rings, the Call Display and **mini-alert** show Caller ID information. You can handle the incoming call in several ways such as: answering the call (**ANSWER**); using a *virtual answer* greeting (**VIRTUAL ANSWER 1**); or letting the phone ring and let the caller leave a message in your voice mailbox. You can use even more options — for example, listening to the caller while he leaves a message (**MESSAGE MONITOR**). If the caller leaves a message, you can select it by looking in your *Outlook* Inbox, highlighting the message, and then clicking **PLAY** on the *VIP* toolbar (you also can just double-click the message). While you're in the Inbox, of course, you can also read any new e-mails.

But what if the caller hears your greeting and decides not to leave a message? This would be a missed call, which you can view in *Outlook*'s **Missed Calls** folder.

To place an outgoing call, **either** double-click a Quick Contact List entry **or** click inside the Call Display and manually type a number using your computer keyboard.

Finally, let's say it's now time to leave work, and you want to set your mailbox to play a different greeting because you'll be out of town the next day. Just access user programming under **Tools** in the Call Display. Under the **Personal Greetings** tab, you see that greeting 2 is recorded (and you know it's the one needed to allow message notification to your cell phone), so you select it. Then, switch to the **"Reach Me"** tab and ensure that delivery to your cell phone is chosen, enter the appropriate cell phone number, and click **Apply** to update your phone. Your phone is now set to handle calls while you're out of the office.

This is only a small example of what *VIP* can do. However, you can see that *VIP*'s various elements work together to maximize the usability and efficiency of both your ESI phone system and *Outlook*.

Setting up *VIP*

To install and configure *VIP* correctly, complete **all** of the following three steps (explained in detail beginning below). **Failure to do so may cause *VIP* not to function properly.**

1. Observe minimum ESI hardware and computer software requirements*.*

2. Install the *VIP* software.

3. Set up *Outlook* dialing options and properties.

Step 1: Observe minimum requirements

ESI requirements

- ESI 48-Key Digital Phone or ESI 48-Key IP Phone (local, Remote, or IP Feature Phone II) installed at the extension.

- A *VIP* version that supports the *VIP* application for which you're licensed (see table, *right*).[1]

- One of the following ESI phone systems, **with** installed or built-in Network Services Processor (NSP):

	VIP versions	
VIP application	**3.13.x**	**3.11.x**
VIP (Basic)	✔	✔
VIP Professional	✔	
VIP PC Attendant Console	✔	
VIP ACD Supervisor	✔	
VIP ACD Agent	✔	
VIP Softphone	✔	

	Minimum ESI system software versions required for each *VIP* version				
VIP version	**ESI-1000, ESI-200, ESI-100, ESI-50, or ESI-50L[2]**	**ESI-600**	**IVX S-Cls. Gen. II[3]**	**IVX X-Cls.**	**IVX E-Cls. Gen. II**
3.13.x	[All]	16.1.0	4.7.0*	10.9.0*	2.8.0*
3.11.x	[Incompatible]		4.4.0	10.6.0	2.5.0

> **Warning:** Upgrading system software to any of these from an older version (unless marked by *) will cause your system to initialize. Consult your ESI Reseller for more information.

Computer system requirements

	Windows operating systems[3]						*Outlook* versions				PC hardware				
	Vista[4]	**XP**	**2000**	**ME[5]**	**NT[5][6]**	**98[5]**	**2007**	**2003**	**2002**	**2000**	**Proc, spd.[7]**	**RAM (MB)**	**Free HD space (MB)**	**LAN**	**USB**
VIP	YES	YES	YES	YES	4 w/SP 6	YES	YES	YES	YES	YES	400 MHz	128	25	YES	N/A
VIP Professional	YES	YES	YES	YES	4 w/SP 6	YES	YES	YES	YES	YES	400 MHz	128	25	YES	N/A
VIP ACD Agent	YES	YES	YES	NO	NO	YES	YES	YES	YES	YES	400 MHz	128	25	YES	N/A
VIP PC Att. Console	YES	YES	YES	YES	4 w/SP 6	YES	YES	YES	YES	YES	400 MHz	128	15	YES	N/A
VIP Softphone	YES	YES	YES	NO	NO	NO	YES	YES	YES	YES	1 GHz	256	25	YES	YES[8]

> **Note:** *VIP* is **not** compatible with a Citrix, *Windows* Terminal Services, or other similar environment. Furthermore, *VIP* is **not** compatible with: LexisNexis® *Time Matters*®; any Grisoft *AVG*™ product; *BitDefender*®; any CA™ *eTrust*® product; or any *Oncontact*® application.
>
> ESI neither tests whether, nor claims that, *VIP* should work alongside PDAs, Pocket PCs, or synchronization software for these devices. Similarly, the only *VIP* feature known to work with a BlackBerry® is remote voice mail notification. You must be at a PC, with an ESI Feature Phone, to use *VIP*'s unified messaging and call control features.

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[1] IP E-Class Generation II (a legacy product not shown in the table of ESI systems) supports only *VIP* versions 3.11.0 or earlier and therefore **is not** compatible with *VIP Professional*-compatible applications.

[2] Doesn't support *VIP ACD* or *VIP Softphone*.

[3] Any 64-bit version of *Windows* is incompatible with *VIP*.

[4] *Vista* compatibility applicable for *VIP* 3.15.0 (and higher).

[5] Not supported after April 25, 2008.

[6] Workstation only.

[7] Intel® Pentium® II (or equivalent) or better.

[8] *VIP Softphone* requires use of a USB headset connected to the PC.

Step 2: Install the ESI software

The ESI Reseller or System Administrator must enable your voice mailbox for *VIP*, *VIP Professional*, or *VIP PC Attendant Console*. If you aren't sure whether your voice mailbox is properly enabled for *VIP*, please contact your System Administrator.

Important:	If you have a previous version of *VIP* on your system, uninstall it before installing this version.[1]
	The PC where you're installing *VIP* must have *Windows* Administrator log-in privileges at the time of installation (but this isn't necessary **after** installation of *VIP*).

Obtaining the VIP installer software from the Web

The *VIP* installer software is available as a free download.[2] Please follow these instructions **first**, regardless of which *VIP* type is enabled for your installation.

1. Point your Web browser to *www.esiusers.com/downloads*. This will take you to the "Downloadables" page on ESI's special Web site for users of its products.
2. Click the link for *VIP* software. This is a self-expanding archive file, *VIP.exe*.[3] When your Web browser asks whether you want to **open** or **save** the file, select **save** and pick a location on your PC where you can find the file again in subsequent steps.
3. Open *Windows Explorer* and navigate to the location where you saved *VIP.exe* in step 2. Depending on your "Folders" settings in *Windows*, the file name will appear as either *VIP.exe* or *VIP*.
4. Double-click this file to expand the needed files, one of which — *Setup.exe* — is the *VIP* installer file.

To install VIP

Note:	When you're installing (or uninstalling) *VIP*, the **VIP Installer** window may appear to freeze. Give the Installer several seconds to perform its required actions. You'll know when the installation (or uninstallation) is finished when you see a box with an "**Installation Complete**" message, as shown on page 11.

1. Close *Outlook* — **including** any open messages, reminders, or other *Outlook* items, even if they appear in separate windows.

Note:	Sometimes *Outlook* appears to be closed, but really isn't. The easiest way to make sure is to restart *Windows*. (See also "Repairing *VIP*," page 71.)

2. If you haven't done so already, assign a password at your phone: press **PROGRAM 5 1** and follow the prompt instructions to set a password.
3. Access the directory that contains the *VIP* installer file, *Setup.exe* (or *Setup*).
4. Double-click the VIP Installer file. This will cause the **VIP Setup Wizard** to appear.

Note:	If the PC on which you're installing *VIP* had a previous version of it, you won't be prompted to enter your password or extension, or be notified of the system's NSP IP address. If you need to update this information after an installation, click the **VIP** tab under **Options** on the *VIP* toolbar.

(Continued)

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[1] This will **not** erase your settings, contacts, logs, etc.; they will reappear when you install the current version of *VIP*.
[2] Your ESI phone system must be properly licensed before *VIP* will work with it. For more information about system licensing, consult your System Administrator or ESI Reseller.
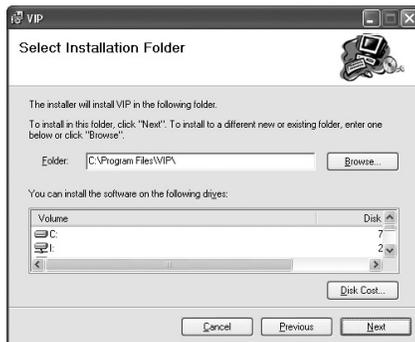[3] The ".exe" *extender* may not appear in some cases, depending on your *Windows* Folders settings in *Explorer*.

5. Follow the installation instructions displayed by the *VIP* **Setup Wizard**.
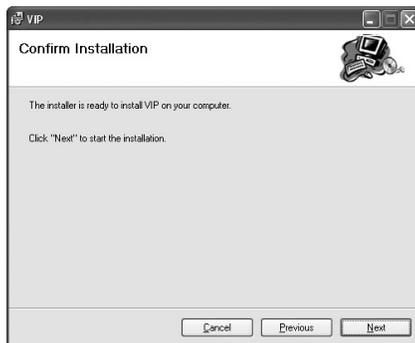
You'll see this screen at the beginning.

Click **Next** to proceed.

This screen lets you choose a location on your PC's hard drive to save the program.

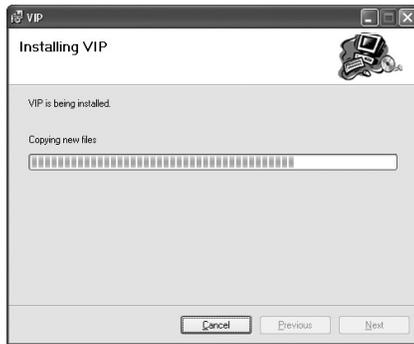Typically, the default choice (*C:\Program Files\VIP*) is best.

Click **Next** to proceed.

The *VIP* **Setup Wizard** now advises you it's ready to perform the installation.

Click **Next** to proceed.

(Continued)

This screen is a visual indication of the **VIP Setup Wizard**'s progress in the installation.

If installing on *Windows XP* or *Windows Vista*, you'll receive at least one security alert titled "**Run As**" (*below*).

If you're currently logged into *Windows* as an Administrator, choose **Current user** and click **OK**.

If you're **not** currently logged into *Windows* as an Administrator **but** you know the Administrator password, click **The following user**, choose **Administrator** in the **User name** field, type the Administrator password in the **Password** field, and click **OK**. (If you don't have Administrator access, the installation will be aborted.)

If you have only one NSP-equipped ESI phone system, you'll see a screen like this. The numbers in parentheses indicate the system's **IP address**.
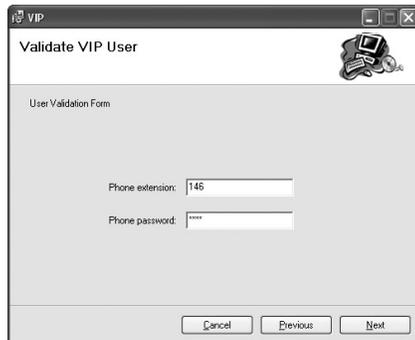
Click **Next** to proceed.

. . . However . . .
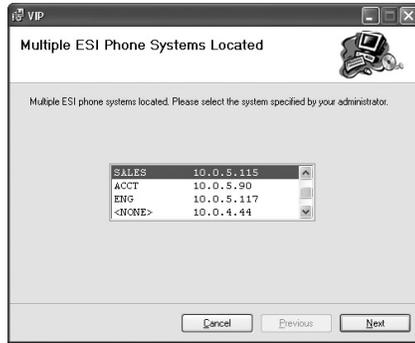
. . . if the **VIP Setup Wizard** detects **multiple** NSP-equipped ESI phone systems, you'll see a screen like this, showing each system's assigned **name** and **IP address**.

Click the appropriate system[1] for your station, and then click **Next** to proceed.

Note:	If the **VIP Setup Wizard** has found **no** NSP-equipped ESI phone systems, you'll be directed to contact your Certified ESI Reseller for assistance.

Enter your **phone extension** and your **phone password**.[1]

Click **Next** to proceed.
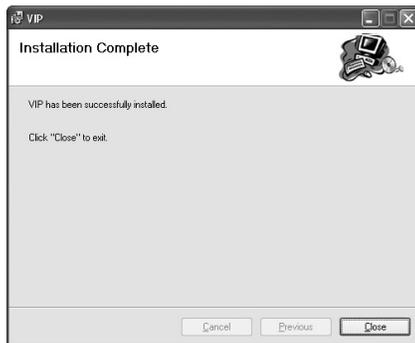
Congratulations! *VIP* is now successfully installed on your PC.

Exit the **VIP Setup Wizard** by clicking **Close**. Then proceed to "Step 3: Set up *Outlook* dialing options and properties" (page 13).

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[1] If you need additional information about this, consult your System Administrator.

Step 3: Set up *Outlook* dialing options and properties

You will need to set up *Outlook* dialing rules in order to make calls from *Outlook* (or the *VIP* Quick Contact List in the Call Display).

1. Click the **VIP** button located on the *VIP* toolbar. You will see a progress bar while the PC retrieves call processing data from the ESI phone system. *VIP* software has now been initialized and a new dialing line has been added to your PC.

2. Go to your *Outlook* contacts folder. Highlight any contact with a phone number, right-click, and select **Call Contact**. The **New Call** dialog box will appear.

3. There are two items to set from the **New Call** dialog box: **Dialing Options** *(below)* and **Dialing Properties** *(page 13)*.
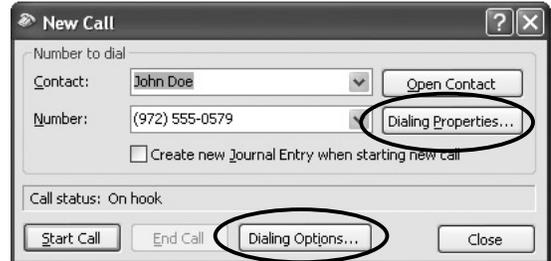
Dialing Options

1. In the **New Call** dialog box, click **Dialing Options**. The **Dialing Options** box will appear.

2. At the bottom of the **Dialing Options** box, there is a pull-down list under **Connect using line**. Scroll through the list and select **ESI VIP TAPI Line**, as shown.[1]

3. Click **OK**.
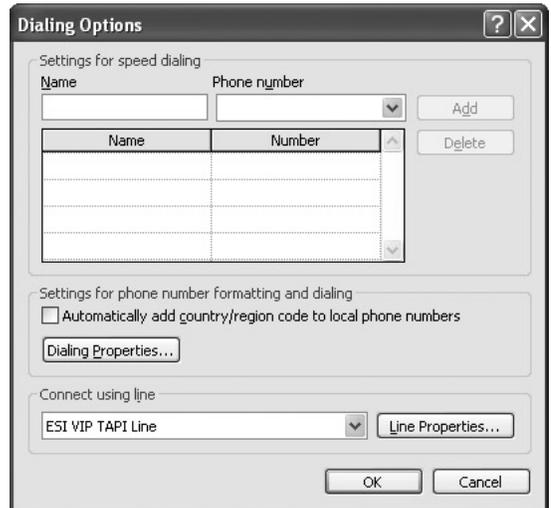
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[1] In certain versions of *VIP*, the item may say **ESI VSP IP Line** or **ESI VIP Service Provider**, rather than **ESI VIP TAPI Line.**

Dialing Properties

1. In the **New Call** dialog box (see page 12), click **Dialing Properties.** The **Phone and Modem Options** dialog box will appear.

2. If there are no locations listed in the **Phone and Modem Options** dialog box, click **New**. Otherwise, highlight the location listed and click **Edit**.

3. Next, enter your location's area code.

4. Enter the outside line access number. This number is the same access code (*9* is the most common) you use if dialing from the phone.
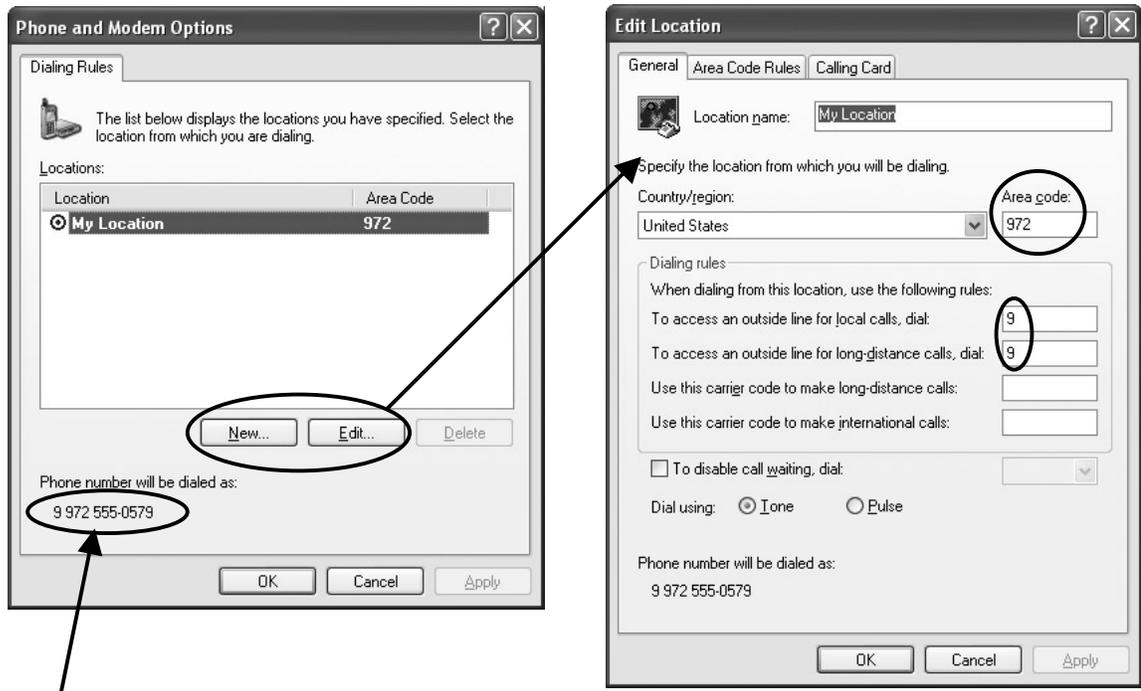
Notice that a sample appears, to show you how a number will be dialed from *Outlook*. If this sample doesn't accurately represent how a number should be dialed, go back through the *Outlook* dialing rules setup to ensure you've made all the appropriate selections. (If necessary, consult *Outlook*'s on-line help, under **Help** in the *Outlook* menu bar.)

(Continued)

5. Now click the **Area Code Dialing Rules** tab.

6. Click **New** to add area codes for your region/area.

> **Note:** While larger metropolitan areas may have multiple area codes, many cities or areas will have only one.
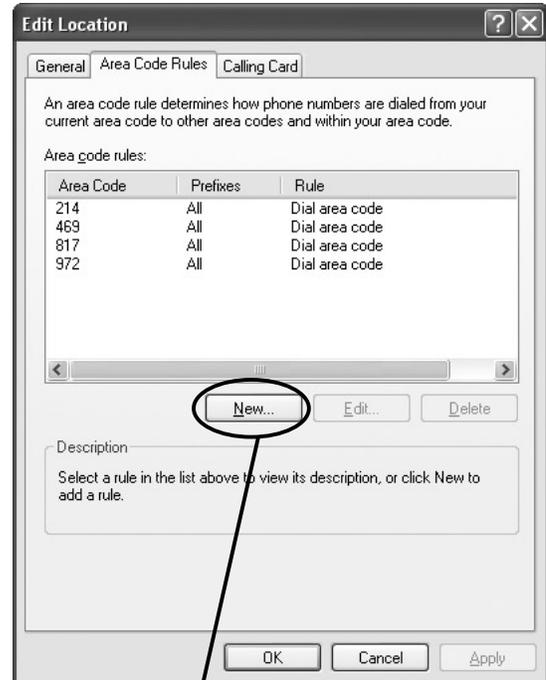
7. To include the area code when dialing, be sure to check the appropriate box.
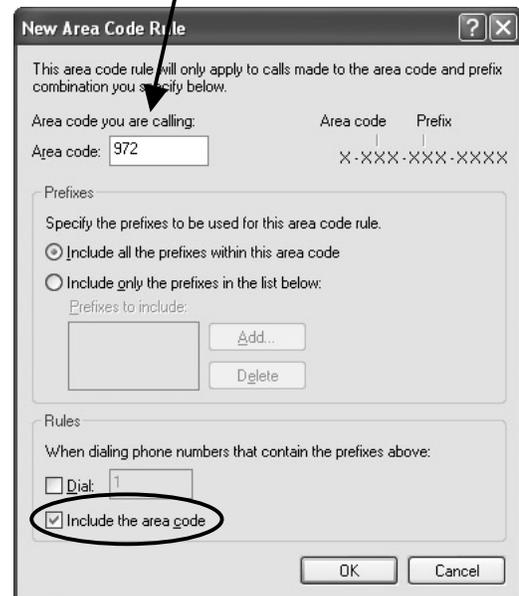
You are now finished. Click **OK** or **Apply** until no more dialog boxes appear. (If given the choice between **OK** and **Apply**, click **Apply**.)

Using *VIP*

VIP Call Control window: Quick overview

The **VIP Call Control** window[1] lets you perform most call-handling functions from your PC and can be accessed from the *VIP* toolbar.

The **VIP Call Control** window (shown in idle mode, *below*) has four main components:

Menu bar — Gives you access to all available call commands, customization settings, and user help.

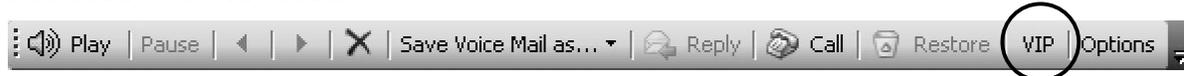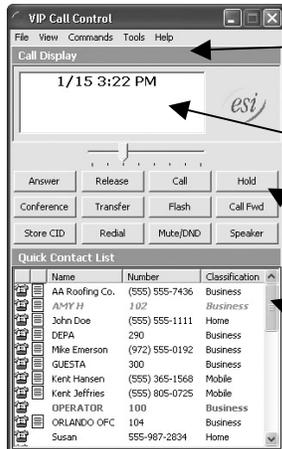**Call Display —** A three-line call status display similar to your phone's display.

Call command buttons — Perform desired call-handling functions.

VIP Quick Contact List — Includes an unlimited number of contacts, listed alphabetically for easy call access. In *VIP Professional* and *VIP PC Attendant Console*, the **phone icon** and **memo icon** on the left side provide quick access to text-messaging, e-mail, and all phone number contacts in *Outlook*.

Unified messaging

When you open *Outlook*, *VIP* **synchronizes** with your voice mailbox on the phone system.
For example, new messages (including voice mail messages, live call recordings, and personal memos) left in your voice mailbox will appear as new voice mail notifications in your *Outlook* Inbox.

Quick overview

• Each message notification header displays name and number information (Caller ID)[2], message duration, date and time.

• A header shown in **boldface** indicates a new message. Messages can be played in any order by clicking the e-mail and then on **Play**; the message will be played through the speaker (or, if it's off-hook, the handset) of the ESI phone associated with the voice mailbox.
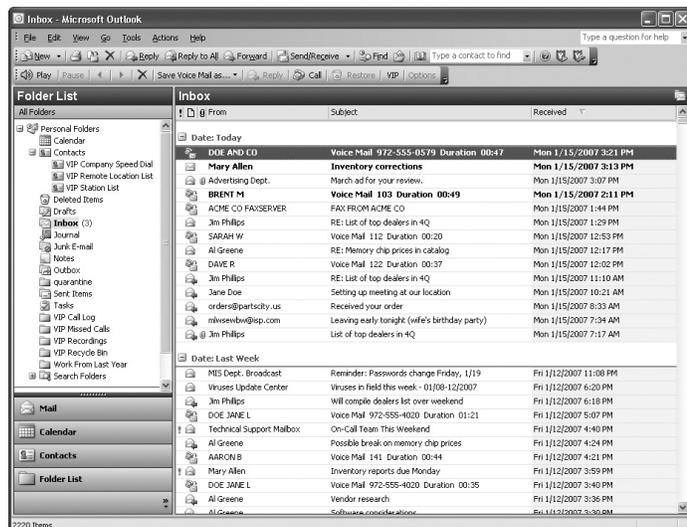
(Continued)

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[1] Often called just "Call Display" in much of this document.
[2] If you have subscribed to Caller ID service from your telephone service provider.

- After a message is played via *VIP*, your Feature Phone remains connected to voice mail for several seconds to allow you to manipulate the voice message from the phone. You can save, delete, or move the message from your Feature Phone or your *VIP* toolbar. If the message is neither saved nor deleted, it is treated as **new**. The last 10 deleted messages are moved to the *VIP* Recycle Bin (for more information on the Recycle Bin, see page 28).

- If you need to place a call while the phone is still connected to voice mail, either (a.) click **Release** or (b.) pick up the handset and then hang up.

Using the toolbar

The *VIP* toolbar lets you easily manage and prioritize voice mail messages with familiar buttons. You can customize the toolbar to display only the buttons you want (see "Customizing the *VIP* toolbar," page 57).

If a button is "grayed-out," its function is unavailable. For example, the **Reply** button is accessible when a selected voice mail message is left by another station (*i.e.*, an inside caller), but "grayed out" when a message is left by an outside caller. When a new voice message is left in your voice mailbox, you will see a new heading displayed in your *Outlook* Inbox.

Toolbar reference guide

Button	Name	Function
◁》 Play	**Play**	Plays the selected voice mail on your ESI Feature Phone's speaker. (You can also play a message by double-clicking the message as listed in the *Outlook* Inbox.) For privacy, pick up the handset.
◁》 Stop	**Stop**	Stops a currently playing voice mail message. This button is available after pressing **Play**. (You can also stop a voice mail message by hanging up or pressing **SPEAKER** on your ESI Feature Phone.)
◁》 End	**End**	Ends a call. Same function as hanging up. This button is available after pressing **Call**.
Pause	**Pause**	Pauses a currently playing voice mail message.
◀	**Rewind**	Rewinds the currently playing voice mail message by four seconds.
▶	**Fast Forward**	Advances the currently playing voice mail message by four seconds.
✕	**Delete**	Deletes the selected voice mail message notification. The message notification moves to the *VIP* Recycle Bin folder in *Outlook*. You can restore up to the last 10 deleted messages.
Save Voice Mail as... ▾	**Save Voice Mail as...**	Saves the selected voice mail message as "new" or "old" in your voice mailbox, or as a .WAV file on the PC. The notification line for a new voice mail message is bold-faced.
Reply	**Reply**	Sends a voice-mail reply to the voice mailbox of the person who sent the message. You'll hear the originator's greeting on the speaker of your phone (or pickup the handset). Leave a reply message, and then either press **SPEAKER** or hang up. (Can only be used for station-to-station calls.)
Call	**Call**	Initiates a callback to the inside or outside voice mail originator.[1] To end the call, press **End**.
Restore	**Restore**	Restores a deleted voice mail message as a saved (old) message. To restore a message from the *VIP* Recycle Bin, highlight the message and press **Restore**. The message notification moves to your Inbox with a status of *Saved* (old). The status is also reflected on your phone's display.
VIP	**VIP**	Displays the *VIP* **Call Control** window, from which the user can initiate an outbound call, set up a conference, and perform many other call-handling features — entirely from the PC.
Options	**Options**	Displays the *Outlook* **Options** window. Click the **VIP** tab to display configuration options. You can: customize the toolbar; configure extension, network, and delivery options; and set the e-mail address for remote delivery of messages.

---

[1] Caller ID service is required for this feature to operate on outside calls.

Saving voice messages as .WAV files

1. Highlight the desired voice message and click the **Save Voice Mail as…** button; then select **WAV File**.

> **Note:** The folder *c:\Program Files\VIP\Messages* is where *VIP* stores .WAV files by default. For more control over the location of these files, see "Saving .WAV files to a user-defined location," page 18.
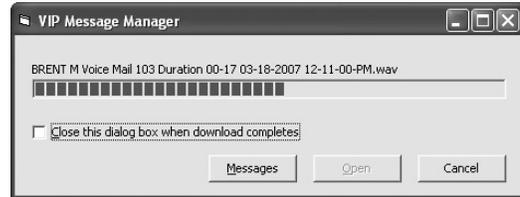
2. A **VIP Message Manager** status box (shown, *right*) will appear, showing the progress of the voice mail message being converted into a .WAV file. This is also the only opportunity you have to cancel this **archiving** operation — *i.e.*, by clicking **Cancel**.

3. You'll know that *VIP* has completed the archiving operation when the **Open** button is active (not "grayed-out," as *above*) — or if the **VIP Message Manager** status box closes when you select it.

You can now play the voice mail with *Window Media Player*[1]; you also can retrieve the file to attach to an e-mail.

1. If the **VIP Message Manager** status box is still open, you can click **Open** to play the .WAV file with *Windows Media Player*. You can also click **Messages** to view all of your .WAV files (shown, *right).*

2. Select a .WAV file. **Right**-click on it to see a pop-up menu.

3. Select **Send To**, then **Mail Recipient** (shown, *right).* This will result in an *Outlook* e-mail message with the .WAV file already attached. You may wish to type in some more information before sending the e-mail message — for example: *"Hi, John. I've attached this voice mail message so you can hear this customer's comments."*

> **Note:** *VIP* saves each .WAV file as a normal PC file, so you also can copy and paste a .WAV file (from *Windows Explorer* or even another *Outlook* e-mail message) into an e-mail message, as well as attach it from the *c:\Program Files\VIP\Messages* folder [see step 1].
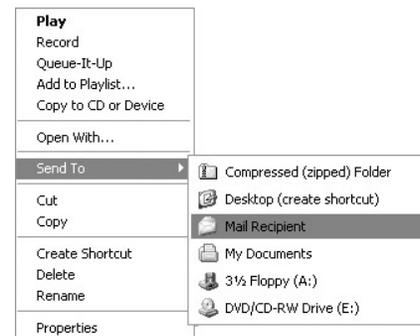
> **Notes:**
>
> The system can archive (save-as-.WAV) only **one** voice mail message at a time. If the system is busy with this when you attempt to archive a message, you'll receive a notification to retry the archiving operation.
>
> Archiving speed depends on which ESI phone system you have. For example, archiving a one-minute voice mail message can take as little as 10 seconds or as long as three minutes.
>
> Archiving voice mail messages from a remote (Esi-Link) location is not supported.

---

[1] Or your PC's other WAV-playing software, such as *iTunes*, *WinAMP*, or *QuickTime* — although we refer only to *Windows Media Player* in this discussion.

Saving .WAV files to a user-defined location

VIP saves a .WAV file in a specific location when you use **Save Voice Mail As**. By default, this location is *C:\Program Files\VIP\Messages*, but you have other choices:

1. Click **Options** on the *VIP* toobar. This will bring up the *Outlook* **Options** window.

2. Select the **VIP** tab.

3. Click the **Voice Mail Options** button. The **VIP Voice Mail Options** window *(right)* will appear.

4. Click a button to select one of the three options:

- **Save to default location** — .WAV files will be saved to *C:\Program Files\VIP\Messages*.

- **Save To** — This lets you select a standard .WAV storage location, by clicking **Browse** and then locating the folder of your choice.

- **Allow location selection each time file is saved** — Picking this option will cause *VIP* to prompt you, each time you save a .WAV file, for a location. You'll then be allowed to browse to the folder of your choice.
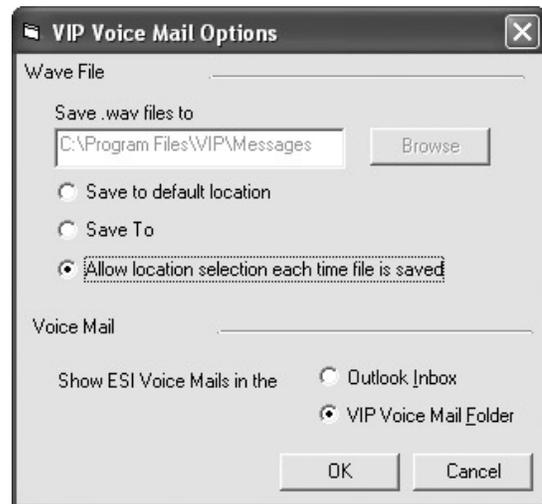
> **Note:** Neither of the last two options moves any .WAV files you've **already** stored; it simply makes a new setting for .WAV storage in the future (until you make any more changes here).

5. Click **OK** to save your setting, and then **OK** again to exit the *Outlook* **Options** window.

(We'll cover the information at the bottom of this window in the "Special options" section that begins on page 52.)

Fax server integration

If your ESI phone system has been connected to a third-party **fax server** application/device, *VIP* will also let you see **faxes** in your Inbox, just like e-mails. Each fax will be in the form of an e-mail with an attachment (PDF, TIF, etc.). Open the attachment as you would any other attachment, to view, print, or save. For more information on your company's fax server, consult your System Administrator.

Handling an incoming call

You can be notified in several ways when a call rings to your extension:

• The *VIP* **Call Control** window moves to the front of your other PC applications. Upon the first ring, you'll see Caller ID information in the display.

• A **mini-alert** (shown, *right*) pops up in the lower right-hand corner of your PC screen, in front of your other PC applications.

```
  DOE AND CO
  9725550579
```

• As always, your phone still rings![1]
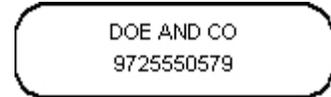
> **Note:**   You can customize these and other options. See "Special options," beginning on page 52.

Once you're presented with an incoming call, you can answer by lifting your phone's handset or by clicking the *VIP* **Call Control** window's **Answer** button (in the latter case, the audio will come through on your speakerphone). You also can click **Speaker** to answer on your speakerphone.

To hang up, click **Release** or hang up the handset. The *VIP* screen will return to its normal idle display.

Incoming calls from . . .

. . . an extension.

. . .an outside line (CO call).

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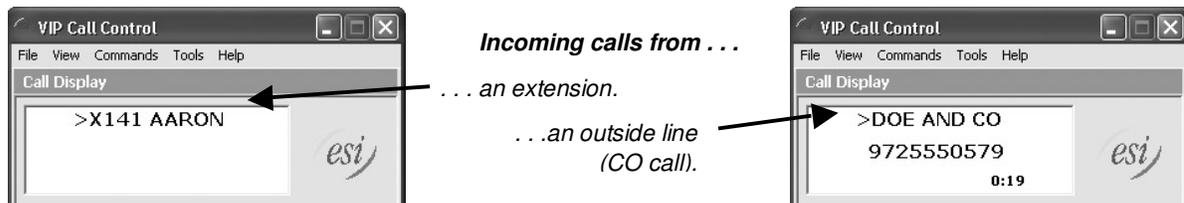
[1]   *VIP Softphone* ringing is heard through either the USB headset or PC speakers.

Placing outbound calls . . .

You can generate an outbound call in several ways.[1] The easiest way is just typing an extension or number directly into the display:

1. Put the cursor in the middle of the display.

2. Type in the desired extension or phone number[2], and then press **Enter** on your keyboard. On the phone's speaker, you'll hear the phone dialing the number.

3. Once the call connects, pick up the handset to begin a conversation. Proceed normally with the call.

4. When the conversation is over, click **Release**.

Note: You can pick up the handset at any time, if you prefer not to have any sound come through the speaker.

If the *VIP* Call Display is "on top of" all other running *Windows* applications, the following are true:

• You can use the plus and minus (**+** and **–**) keys to control handset or headset volume.

• If you call a number that's answered by an automated attendant, you can enter required numbers (such as an account number; see the example below) from the PC keyboard.

Example: You're typing in a *Word* document while *VIP* is dialing your bank. The bank's automated attendant answers and prompts you to enter your account number. Any number you type on the keyboard will be entered in the *Word* document rather than in the Call Display, because *Word* is "on top." To enter the number from the Call Display, click on it (if necessary, click on its box in the *Windows* taskbar, usually found on the bottom of the *Windows* screen).

. . . using the **VIP** *Quick Contact List*

To call any entry in your *VIP* Quick Contact List (see also "Using the Quick Contact List," beginning on page 21), highlight the contact and double-click. In a *VIP Professional*-compatible application, you also can click the phone icon to choose from a list of numbers that are available for that contact.

. . . using call activity records

You can use the Caller ID information in the header of a voice mail, a call log entry, a recording, or a missed call to place a call. Highlight the record with the Caller ID information, and click the phone icon on the *VIP* toolbar; a call will automatically be placed to that person. Proceed normally with the call. Once the conversation is over, click **Release** (or, in the case of a hands-free conversation, **Speaker**).

Note: Contact information or Caller ID in voice mails and call log records cannot be dragged or copied directly into the Call Display display. See "Contact management" (pages 25–28) for how to move to the *VIP* contact list those *Outlook* contacts whose numbers **can** be dragged into the display.

. . . using **Outlook** *Contacts and speed-dial lists*

To call someone directly from either the *Outlook* contacts list or *VIP* speed-dial lists, highlight the desired name and click the *Outlook* toolbar's phone icon. A box appears, showing the contact's name and number. (If the contact you selected has more than one phone number, click the arrow in the number field to select the appropriate number.) Once you have the correct phone number, click **Start Call**.

Proceed normally with the call. Once the conversation is over, click **Release** (or, in the case of a hands-free conversation, **Speaker**).
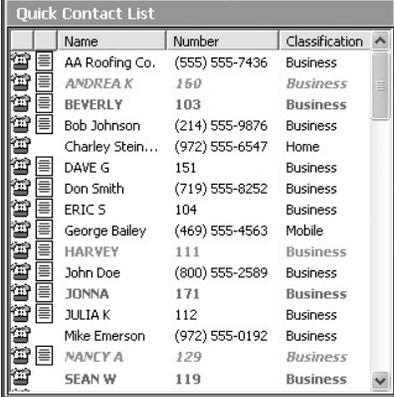
---

[1]   *VIP Softphone* always uses the USB headset.
[2]   If it's necessary to dial a line access code (such as "9") to make an outbound call, you have an older version of *VIP*. Download the latest version from *www.esiusers.com/downloads*.

Using the Quick Contact List

The bottom half of the *VIP* Call Display displays the **Quick Contact List** (*VIP Professional*-compatible version shown, *right*), which is manually populated from any *Outlook* contact containing a phone number or ESI phone system extension.

Each Quick Contact List entry shows name, number, and the number's classification — plus, if you're using a *VIP Professional*-compatible application, special **phone and memo icons** (see *below*) if applicable for the entry.

Station status

The Quick Contact List shows **station status** for ESI extensions by showing them in different colors and font appearances:

- **Red** — The extension is in use.
- **Orange** (**amber**) — The extension is in DND (do-not-disturb) mode.
- ***Orange italicized*** — Your system is equipped with ESI Presence Management, and the extension's user is off-premises — *i.e.*, has "tagged out" of the building.

Phone and memo icons

if you're using a *VIP Professional*-compatible application, the **phone** and **memo** icons let you access e-mail addresses and multiple numbers for a single Quick Contact List entry and text-messaging.[1]

Phone icon
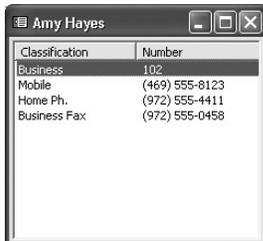
Assume that Amy is a saved *Outlook* contact. She has four phone numbers, including her system extension number (102). She also has two e-mail addresses. You drag her contact information to the Quick Contact List. Since she has multiple phone numbers, you get to choose which phone number should appear in the Quick Contact List. In this example (shown, *left*), you've chosen extension 102. *VIP* thus "stores" the other three phone numbers. When you click the phone icon, *VIP* will give you a list of the other three numbers; to call Amy on any of the numbers, double-click the number. You can still double-click the Quick Contact List name to call the selected number directly.

If you prefer to see more than one phone number for an individual in the Quick Contact List rather than having to click the phone icon, you can drag the contact from *Outlook* multiple times until you've chosen all the phone numbers from the pop-up list. [If you choose to see a person's extension and personal phone numbers in one list when clicking the phone icon, you must manually enter the extension number on the *Outlook* contact page (*right*).]

> **Note:** If the Quick Contact List entry has only one e-mail address and isn't available for text-messaging (for example, it's an outside Contact who therefore isn't on your system), clicking the entry's memo icon automatically brings up a pre-populated new e-mail message window in *Outlook*. Similarly, if the entry is someone on the system who has no e-mail addresses stored in your *Outlook* Contacts list and each of you is using a *VIP Professional*-compatible application, clicking the entry's memo icon automatically opens a text-messaging window.

---

[1]   Refer to "Text-messaging," page 23. This feature is on **only** a *VIP Professional*-compatible application.

Memo icon

Clicking the memo icon by a Quick Contact List entry launches a window that lets you choose to send the person an e-mail (or, if each of you is a system user with a *VIP Professional*-compatible application, a text message[1]).

Returning to our previous example, assume the contact info you have for Amy includes two e-mail addresses. Both you and Amy are *VIP Professional* users. When you click the memo icon, you'll be presented with a list *(shown)* which lets you choose one of the e-mail addresses or text-messaging. Choosing an e-mail address will bring up a standard *Outlook* e-mail message window, with the address field pre-populated. Choosing text-messaging will launch a *VIP* text-messaging window to that extension.

If you prefer to see a person's e-mail addresses and text-messaging options in the list, you must manually add the person's extension to her *Outlook* contact entry as described in "Phone icon" (page 21).
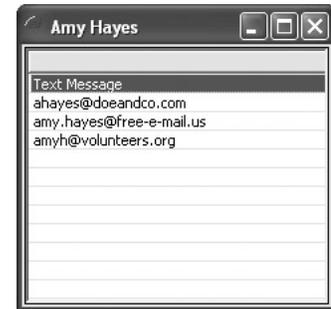
> **Note:** If the Quick Contact List entry has only one e-mail address and isn't available for text-messaging (for example, it's an outside Contact who therefore isn't on your system), clicking the entry's memo icon automatically brings up a pre-populated new e-mail message window in *Outlook*. Similarly, if the entry is someone on the system who has no e-mail addresses stored in your *Outlook* Contacts list and each of you is using a *VIP Professional*-compatible application, clicking the entry's memo icon automatically opens a text-messaging window.

Adding contacts to the Quick Contact List

To add contacts to the *VIP* list:

1. Open the *Outlook* **Contacts** folder (or a speed-dial list subfolder).

2. Highlight any entry (including the speed-dial lists) in the opened folder and **hold down** the left mouse button.

3. Drag the contact into the *VIP* list box; then, release the mouse button.

   If you have more than one phone number for the contact you will be asked to choose a single phone number to display in the *VIP* list. Therefore: if a contact has three phone numbers and you want all three phone numbers in the *VIP* list, you must drag-and-drop that contact three times.

4. You'll see an *Outlook* warning message *(right)*. This indicates an *Outlook* feature is trying to protect your PC from viruses. To give *VIP* access to your *Outlook* contacts, you'll have to check the **Allow access for** box; you also can allow access for one to 10 minutes. Then click **Yes** to continue. (If you click **No**, *Outlook* will close your attempt to add contacts from *Outlook* to the Quick Contact List.) *VIP* will have access to *Outlook* contacts for the selected time. If adding the desired contacts to the Quick Contact List takes longer than the allotted time, the warning will re-appear. Repeat this step until you've finished adding all the desired contacts to the Quick Contact List.

> **Note:** You can select and right-click a Quick Contact List entry, then choose **Edit**. This will update both the Quick Contact List entry and the *Outlook* Contacts list. However, if you edit a contact directly in *Outlook*, you'll have to delete the contact from, and then drag it back into, the Quick Contact List from *Outlook*.

---

[1] Refer to "Text-messaging," page 23, for instructions regarding this feature, which is on **only** a *VIP Professional*-compatible application.

Text-messaging

Important:	Only a user of a *VIP Professional*-compatible application (whether as sender or receiver) can access this feature.

Having a conversation

You can initiate a text message in two ways:

• Select a station in the Quick Contact List and right-click. Choose **Text Message**, which pops up a standard **Text Message** window *(below)*.

• Select a station in the Quick Contact List and click its memo icon.

The person receiving the text message can type a response **or**, to save time, select a "canned" **Quick Response** by clicking one of the nine buttons in the **Text Message** window. (To see what each one would "say," just click its button — you won't be sending the message until you actually hit **Send** or press the **Enter** key.

Only two people can "talk" to each other per **Text Message** window, so there is a separate window for each two-way "conversation." The person's name and extension is located at the top of the window, so you can know for sure with whom you're text-messaging. (The window's width can be adjusted, as you can see in the second example.)
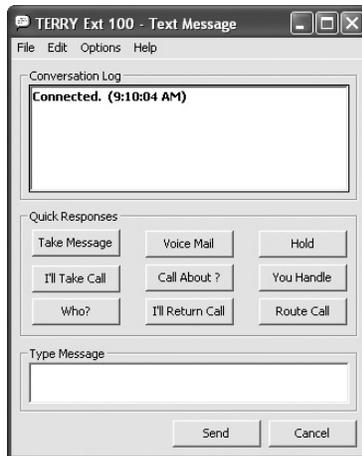
To use this feature, both sender and receiver must have the *VIP* Call Display running (even if it's only minimized). If you send a text message to someone who doesn't have *VIP* running, the text-messaging window will tell you (as shown, *right*) the person isn't on-line for text messages from a *VIP Professional*-compatible application.
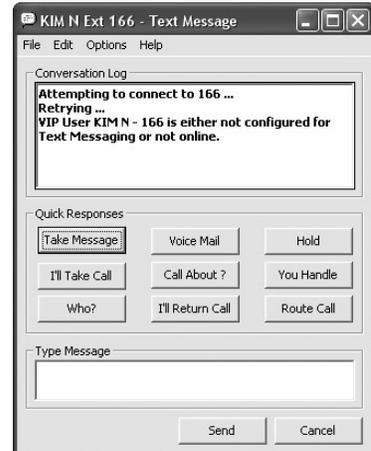
(Continued)

Customizing Quick Responses

You can customize the **existing** Quick Responses **and** add up to nine **additional** Quick Responses. This makes it easy to tailor them to fit your office's special communications needs and patterns.

1. Open a text-messaging window as described on page 23. (If possible, choose someone who isn't on-line so you won't cause a nuisance in case the other person's *VIP* is set to give alerts whenever someone sends a text-message to that station.)

2. Click **Edit** and select **Add Messages**.
   The **Customize Messages** window will appear.

3. To **change** an existing Quick Response, click its button.
   To **add** a **new** Quick Response, click a blank button.
   In either case, the button becomes a field for text entry.

4. In the **Message** box at the bottom, type in the Quick Response you want this button to control.

5. In the button's field, type a short name to describe the Quick Response.
   For example, if the desired Quick Response is "Please send the caller to Bob," you might name the button **Send to Bob** (as shown *below*).

6. Click **Apply** to finish the change.
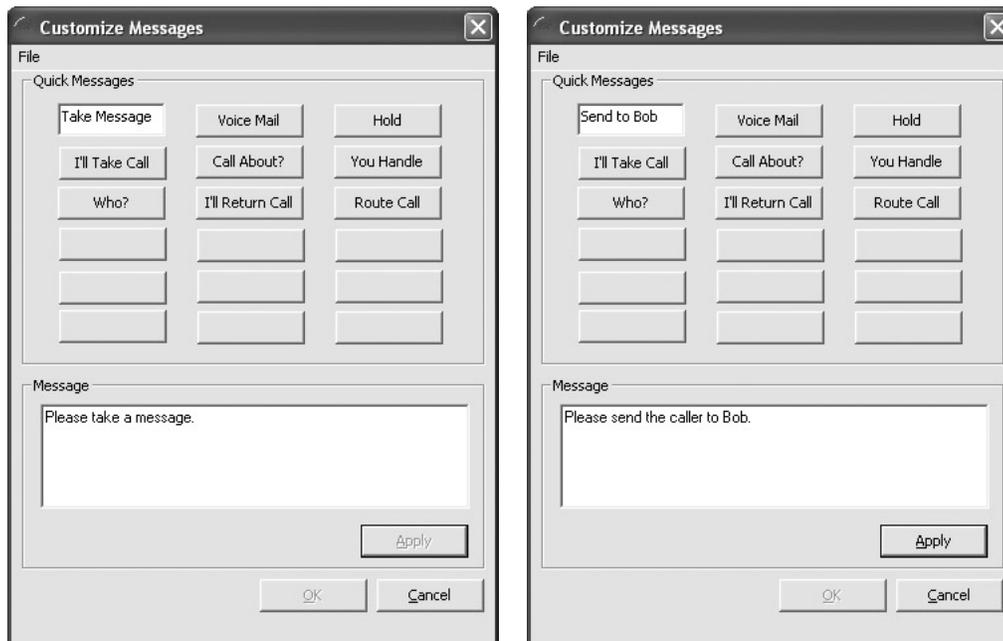
To **clear** an existing Quick Response:

1. Repeat steps 1–2 from the procedure above.

2. **Right**-click the button.

3. Select **Clear**.

4. Click **OK**.

Printing a conversation

Once you click **Cancel**, the current ongoing message will be deleted. To keep a conversation: *before you press Cancel,* click **File** from the **Text Message** window's menu and click **Print**.

Contact management

The term **contact management** refers to how *VIP* groups and moves contacts so they are more easily accessible to the user. *VIP* keeps contacts in several places:

- *VIP* Quick Contact List (attached to the Call Display).

- *Outlook* Contacts.

- Speed-dial lists — Company Speed Dial, Remote Location List, and Station List; these appear as subfolders in the *Outlook* **Contacts** folder (see "Contacts subfolders," p. 27).

- Any voice mail message, call log records, or missed call records with Caller ID.

You can add contacts to *Outlook* by either of the following methods:

- Clicking the **New Contact** icon while in the *Outlook* **Contacts** window, just as you would normally add a new contact in *Outlook*.

- Using the **Store CID** command button in the *VIP* Call Display.

While on an outside call[1] or listening to a voice mail (with Caller ID), click **Store CID**. *VIP* will then "send" the Caller ID information to *Outlook*, which searches for a match with the number and name provided by Caller ID:

- If a match is found, *Outlook* will display a Contact details page *(see right)*, on which you can edit that contact's information:

- If a match isn't found, *Outlook* will still present you with a new Contact details page so you can save the information as a new Contact. If you made an entry mistake and don't want to save the new Contact, just close the window (or press **Esc** on your keyboard) and then choose **No** when *Outlook* asks you whether you wish to save the information.
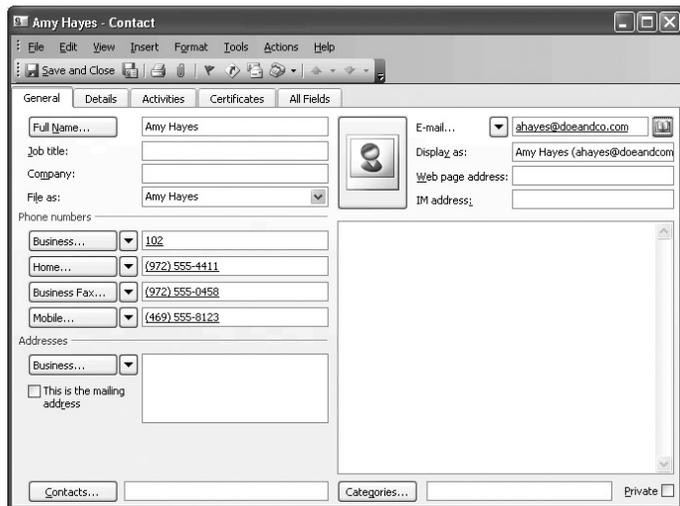
> **Note:** In some cases where the Caller ID name is *"OUT OF SERVICE," "UNKNOWN,"* or *"UNAVAILABLE,"* the system will ignore the name and look for the phone number.

You can click **Store CID** when placing an outbound call[1] from a voice mail, missed call, or call log record.[2] To do so, highlight the desired voice mail, missed call, or call log record, and then click the **Call** (phone) icon on the toolbar to place a call. Once you're connected, click **Store CID**. The system will search for a matching phone number. A Contacts detail page will be provided whether or not a match is found so you can edit and save contact information.

(Continued)

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[1] That is, a call which uses outside phone lines and is **not** simply an internal (extension-to-extension) call.
[2] However, if you enter a number directly into the call window and click **Store CID**, this won't work.

Store CID: Rules

Multiple phone numbers for one person or company

Each use of **Store CID** creates a different *Outlook* Contact page. Therefore, to combine multiple numbers into one Contact page for the same person or company, you must do this manually in *Outlook*.

Scenario:	There are four numbers (obviously with four different Caller IDs) from which Janet Smith typically calls you:

Caller ID	Phone number	Type
JANET SMITH	972 555-3131	Cell phone
SMITH JANET	214 555-6464	Home phone
SMITH INSURANCE CO	1 800 555-9876	Main office
SICO BRANCH OFC	1 719 555-9797	Remote office

The only way you can get all of these into one *Outlook* Contact page is to enter them manually; using **Store CID** would create four different Contact pages. **However:** after you **have** manually created that one *Outlook* Contact page, using **Store CID** when Janet calls you will cause that one *Outlook* Contact page to appear.

Scenario:	ABC Plumbing has one main local number, 972 555-9876, that it provides to its customers; but, when ABC Plumbing's customer service department contacts you, the Caller ID number may actually be 972 555-1234 and, so, clicking **Store CID** will save the number as 972 555-1234. The problem is that is ABC Plumbing's main number — and, therefore, calling it may not be the department you wish to contact. (Similarly, the next call from ABC Plumbing will come from still another number that the company uses.) **Store CID** can't determine that all these numbers belong to the same company and therefore belong on the same Contact page, so you'll have to enter them manually into the page.

Same phone number for multiple people or companies

When two or more *Outlook* Contact pages share the same phone number, *VIP* will bring up the alphabetically highest (or "first") instance.

Scenario:	You have separate *Outlook* Contact pages for Faye Martin and Paul Field, but they share the phone number 214 555-1234. If Paul calls and you click **Store CID**, Faye's Contact page will appear, because her name as stored — *i.e.*, first name first, last name last — is alphabetically higher than Paul's ("F" vs. "P").

Contacts subfolders

The ESI phone system provides you with up to three different speed-dial lists in the form of subfolders in *Outlook* **Contacts**:

- **Station List** — All the stations (extensions) on the system.
- **Company Speed DIal** — All the system-speed-dials (*600-699* numbers) on the system.[1]
- **Remote Location List** — All the location numbers on the system.[2]

|	
Important:	**Don't** move or rename any of these three *VIP* speed-dial lists. If you do, the moved or renamed list will no longer synchronize with the phone system. Once you close and reopen *Outlook*, the folders will automatically return to their original location.

These lists can't be edited. Each time you launch *VIP*, it retrieves updated lists from the phone system. To build information about an employee, simply drag and drop that person's extension from the Station List into the regular *Outlook* **Contacts** folder. Here's how:

1. Open the **Station List** subfolder.
2. Highlight the desired name/contact and **hold down** the left mouse button.
3. Drag the name into the **Contacts** folder and, then, release the mouse button.
4. Open the **Contacts** folder. You'll see that the station has been added to your regular **Contacts** page. Now you can add information about this contact to its details page.

Use this same procedure for the Company Speed Dial list and Remote Location List, as well as voice mails and call log records.

Call activity folders in *Outlook*

Important:	**Don't** move or rename any of these *VIP* call activity folders. If you do, the moved or renamed folder will no longer synchronize with the phone system. Once you close and reopen *Outlook*, the folders will automatically return to their original location.
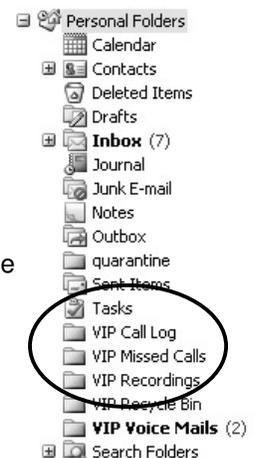
VIP Call Log folder

Call Log is a unique folder within *Outlook* that keeps a list of basic phone calls made from your extension — outbound, inbound, and transferred. *VIP* uses the following rules to determine which calls to include in Call Log records:

1. Inbound and outbound call records are generated only for calls between a station and an outside line.
2. The duration of each call record represents the period during which the station controlled its portion of a call. A record is completed (when the call ends) each time a station does any of the following:
   - Disconnects.
   - Places a call on hold.
   - Transfers a call.
3. Periods when calls are on hold, in the auto attendant, leaving/retrieving voice mail or in an ACD queue are not included in call records.

(Continued)

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[1] Available only if either the Installer or the System Administrator has set up a System Dex.
[2] Available only if your system is using Esi-Link. For more information, consult your System Administrator.

4. A new record begins when a station answers a call or a hold recall.

5. All stations in a conference generate records independently. If more than one outside line is involved in a conference, each call record generated by that conference will be associated with only the last line disconnected.

6. Dialed digits don't include the line group or location number.

7. Outbound calls begin a call record 10 seconds after the call has cleared toll restriction.

Outbound calls made from CID records in *VIP* folders and the Quick Contact List will appear in the Call Log with CID information. However, if you place a call by either direct dialing or the *Outlook* Contacts, the outbound call will show *No Name* in the "From" column.

Only the user can delete Call Log records. The procedure is the same as for deleting an e-mail in *Outlook*. You can also archive Call Log records, just as you can e-mails:

1. Highlight the **Call Log** folder and right-click.

2. Choose **Properties** and then the **Auto Archive** tab.

3. Select how often you would like the Call Log records archived.

There are additional archive settings available in *Outlook*. Highlight **Personal Folders** in the *Outlook* menu; then, from the *Outlook* menu bar, choose **File**, then **Archive**.

VIP Missed Calls folder

The **Missed Calls** folder is similar to the **Call Log** folder, except that **Missed Calls** includes a list of **only** each call which fits **both** of the following criteria:

(a.) You didn't answer the call.

(b.) The caller didn't leave a message in your voice mailbox.

The **Missed Calls** folder holds an unlimited number of Caller ID records.

VIP Recordings folder

This folder is presented to **only** *VIP Professional* or *VIP PC Attendant Console* users. All memos and recordings are kept in the **Recordings** folder. You can delete, play, and archive any recording. To learn how this folder works in conjunction with the auto-record feature, see page 39.

VIP Recycle Bin folder

The **Recycle Bin** folder synchronizes with the ESI phone system's Message Recycle Bin, which holds a list of your 10 most recently deleted messages. If you wish, you can **restore** deleted messages; see the description of the **Restore** button in the "Toolbar quick reference" table (page 16). The Voice Mail Recycle Bin is created when you install *VIP*.

Call commands

You can handle a call in a variety of ways, using *VIP*'s many different **call commands**. Call handling features not displayed in the *VIP* Call Display are located under **Commands** on the Call Display's menu.

> **Notes:** The Call Display can display a total of up to 16 (or, with a *VIP Professional*-compatible application, 20) call command buttons. Four of the buttons — **Answer, Release, Call,** and **Hold** — can't be removed. However, you can change the remaining command buttons to suit your own needs; see "Special options," beginning on page 52.
>
> Since there are more commands available than can fit in the Call Display, you can see a list of available commands by clicking **Commands** on the Call Display menu bar.

ACD commands

> **Note:** ACD commands are not available on IVX S-Class, which has no automatic call distribution. If you're not sure which ESI phone system you have, consult your System Administrator.

An **ACD**[1] **department** is made up of agents who, when **logged on,** can receive calls for that department. Calls go to the logged-on agent who has been idle for the longest time. If all logged-on agents are busy, the ESI phone system places the calls in a **holding queue** and automatically connects the longest-holding call when an agent becomes available. While holding, callers hear periodic prompts to continue to hold. As an ACD department **agent**, you can click **Agt On**/**Off** to place yourself in or out of service for that department's calls.

> **Notes:** Even if you have been **assigned** to more than one ACD department, you need only one wrap button (see "ACD Agent Wrap," *below*).
>
> Never program any of your programmable feature keys as line keys if system-wide hold has been enabled (if you're not sure, consult your system administrator).
>
> If no agents are logged on, incoming calls immediately follow that department's call-forwarding routing.

- **ACD Administrator** — Lets you view the activity of an ACD department. To enable this:
    1. In the *VIP* call window, click **ACD Admin**.
    2. Select the desired department.

    To disable this feature (log off), repeat the same steps, selecting the same department.

- **ACD Agent Log-On**/**Off** — Lets you become an active agent in an ACD department. To activate this:
    1. In the *VIP* call window, click **Agt On**/**Off**.
    2. Select the desired department.

    To disable this feature (log off), repeat the same steps, selecting the same department.

- **ACD Agent Wrap** — Puts your station into **wrap mode**, which delays immediate assignment of the next call until you have had time to complete any "wrap-up" activities (such as entering newly gathered information into a database, as you might do after speaking to a customer or prospect). To enable this feature, click **Agt Wrap** before hanging up on an ACD call.
    As time passes, your display will show how many seconds your station has been in wrap mode. The system has a maximum amount of time this can continue[2] and, once your station reaches that point, it automatically will come out of wrap mode and be active again. However, you can force your station out of wrap mode before then by simply repeating the activation procedure described above.

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[1] Automatic call distribution.
[2] If necessary, consult your System Administrator for this information.

Call Forward

You can temporarily "call-forward" all of your calls, using **Call Fwd**.

If you're **not** using a *VIP Professional*-compatible application, clicking **Call Fwd** will open a field in the Call Display that lets you enter either an extension or external phone number (if the latter, remember to include the line access code — *e.g.*, "9") as the call-forwarding destination. To **turn off** call forwarding, click **Call Fwd** again.

To use the call forwarding feature from a *VIP Professional*-compatible application, click **Call Fwd**. you'll be presented with a list of available extensions. Choose the desired extension (the application's display will update to show the extension to which your phone is forwarded). To **turn off** call forwarding, click **Clear**.

There are six selections you can make for call forwarding:

- Forward all calls to:
  - An extension or department number.
  - A voice mailbox.
  - An external number.

- Forward calls you don't answer ("call-forward/no-answer") to:
  - An extension or department number.
  - A voice mailbox.
  - An external number.

Note: The difference between regular call forwarding and "call-forward/no-answer" is that the latter lets your phone ring first and, if unanswered, performs call forwarding. By contrast, regular call forwarding doesn't let your phone ring but, instead, immediately forwards the call.

When you click **Call Fwd**, the **Call Forward Settings** window *(left)* will appear. As you can see, you have two call-forwarding options: *All Calls* and *No Answer* (*All Calls* is the default).

When you click the **Forward To...** button, a separate window will appear. (It's shown, *right*, as the **Call Forward All Calls** window.) This window displays system extensions, voice mailboxes[1], departments, and external phone numbers. By default, the names are listed alphabetically; but you can sort the list by any of the three columns by clicking on the column header.

When you choose the call-forwarding destination, select it by **either** double-clicking it **or** highlighting it and clicking **OK**. (To cancel the operation without making a selection, click either **Cancel** or the **X** button in the window's upper-right corner.)
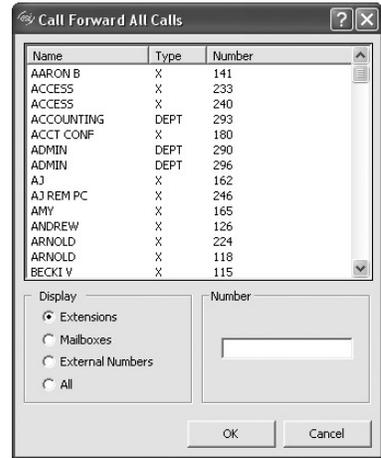
(Continued)

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[1] Does not include guest mailboxes, information mailboxes, or system speed-dial numbers.

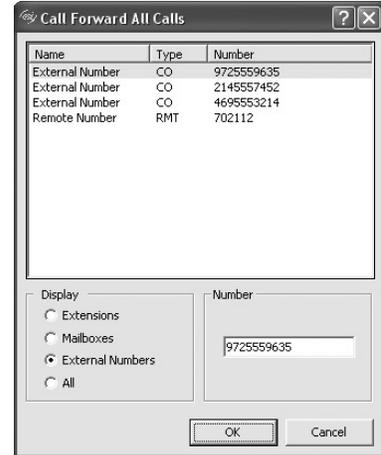You also can select **External Numbers**, which lets you enter a phone number. Once you enter the number, either click **OK** or press the **Enter** key. *VIP* will "remember" the numbers you enter, as shown at *right*. As you can see, *VIP* also lets you correct a mistyped or changed number directly in the list.

To end call forwarding, click **Call Forward** in *VIP*. When the **Call Forward Settings** window appears (this time, showing the destination), click **Clear**.

Conference

Important:	If you set up a conference with *VIP*, you also must end it in *VIP*. Similarly, a conference started on the phone must end on the phone. For example: if you're in a three-person conference that was started on the phone, you cannot open *VIP* and add a fourth member.

VIP presents different, smaller buttons to you while you are creating a conference. They change "states" depending on which action you're performing:

Button	Function
Add	Click this to add a new member to the conference.
Dial	You can click either this button or the regular **Dial**/**Call** button after entering an extension or phone number.
Drop	Drops a member, from the conference. **Note:** If you want to drop only the originator, he/she must have trunk-to-trunk transfer enabled (if unsure of your system's setting, consult your System Administrator).
Flash	If you call a person and get either a recording or no answer, click **Flash** to regroup the current members.
Join Members	Groups members into the conference.
End Conf	Drops **all** members, including you, from the conference. **Notes:** Clicking **Release** performs the same action as clicking **End Conf**. If you want to drop only the originator, he/she must have trunk-to-trunk transfer enabled (if unsure of your system's setting, consult your System Administrator).

*(Continued)*

To create a *VIP* conference:

1. Click **Conference**. The **VIP Conference Call** window *(right)* will appear. It shows the maximum of four possible conference *members*.

> **Tip:** You always appear as *Member 1* in each conference call you create.

2. In each appropriate *Member* window, add a contact whom you want to include in the conference call **(don't dial yet)**. The display accepts a number when you either:

- Directly type in the number.

- Dial a contact from the *VIP* Quick Contact List, *Outlook* Contacts, or the *VIP* speed-dial lists.

3. When all the desired conference members are listed in the **VIP Conference Call** window, call each conference member, one at a time by using his/her **Dial** button. In the second view *(lower right)*, you have successfully connected to Member 2 and have yet to dial your other two conference members.

4. Click **Dial** for Member 3. Member 2 will go on conference hold. Once you have connected to Member 3, click **Join Members**.

5. Click **Dial** for Member 4. Member 3 will go on conference hold. Once you have connected to Member 4, click **Join Members**.
(In other words: Repeat step 4, except to dial Member 4 rather than Member 3.)

It's not necessary to pre-populate the members before you initiate a conference. While on a call, click **Conf** and then follow the same steps above — with one exception: In this case, click **Add**. Then enter a number or drag-and-drop it from either the Quick Contact List or your *Outlook* Contacts.

> **Note:** The **Conference** button performs the same action as the **Add** and **Join Members** commands; so, if you're familiar with setting up a conference on your ESI phone, you may prefer to use **Conference**.
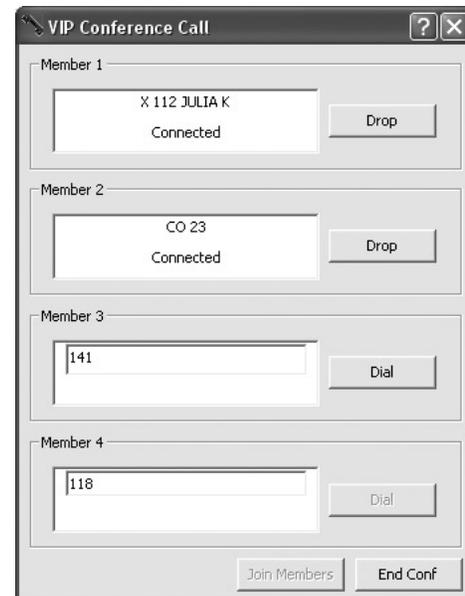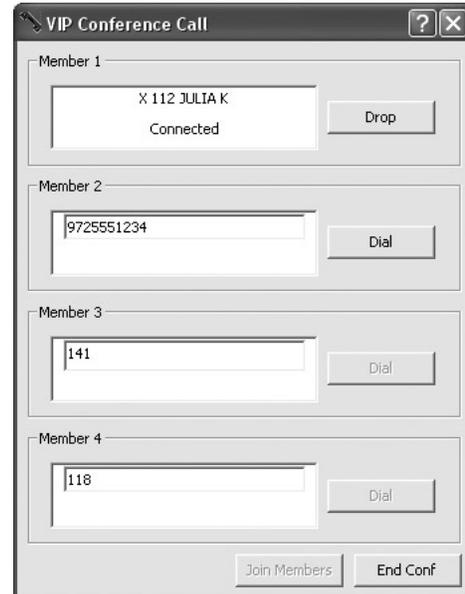
Day/Night

You can change the system's main greeting manually by clicking **Day/Night**. The display switches among *DAY, DAY2, NGT, NGT2, HDAY,* and *AUTO.*[1]

> **Tip:** To keep the system from being taken out of this mode, place it in auto and then delete the programmable feature key's programming.

> **Note:** The System Administrator can also change the mode and/or re-record the holiday greeting remotely to handle unexpected closings, such as for inclement weather.

Flash

Flash serves several purposes:

- **Getting a fresh dial tone without replacing the handset** — When connected to an outside line, click **Flash** to automatically disconnect and receive fresh **outside** dial tone. (See also "**RELEASE**," page 36.)

- **Sending a flash hook signal** — If operating behind *Centrex*[2] or a *PBX*, click **Flash** to transmit a *flash hook signal* automatically to either the phone company's central office or the host PBX. Either may use this signal to provide you with additional features.

- **Toggling[3] between calls** — If you hear a call-waiting tone while on a call, click **Flash** to toggle between the two calls.

Headset

> **Note:** Not applicable to *VIP Softphone*.

You can use your phone with a **headset** connected to the headset jack on the bottom of your phone.

To answer a call while in headset mode, click **Headset**.
To disconnect, click it again (or click **Release**).

After you initiate a call using the headset, lifting the phone's handset automatically takes you out of headset mode. To get back into headset mode, press the headset key on the next incoming call.

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[1] *DAY2* and *NGT2* are not available for IVX S-Class. If you aren't sure which ESI phone system you have, contact your System Administrator.

[2] A special service your phone company may offer. See your administrator for further details.

[3] *I.e.,* going back and forth. For example, when you toggle a light switch, you're flipping it on/off.

Hold, Exclusive Hold

You can place a call on either *hold* or *exclusive hold*. Each puts a call into a standby mode, but here's the difference between the two:

- *Hold* allows **anyone** on the ESI phone system to retrieve the call. The system identifies held calls as being in numerically identified lines — *e.g.,* "Line One," "Line Four," etc.

- *Exclusive hold* keeps the call **only** at the station where the user placed the call on hold.

Placing a call on hold

While on an outside or Esi-Link call, click **Hold** to place the call on hold, or click **Exc Hold** to make the call available for only you to pick up.

Retrieving a call from hold

While the phone is idle, click **Hold**; this presents you with a list of all currently held calls (*VIP Professional*-compatible version shown, *right)*. To be reconnected, just double-click the call you want to take off hold. The same action applies to retrieval of exclusive holds by clicking **Exc Hold**.

> **Note:** The name shown in the **Holding Calls** list is from Caller ID. The phone number will be displayed instead if Caller ID data either is blank, isn't provided, or says, "*UNAVAILABLE*" or "*UNKNOWN*." Also: the time[1] doesn't increment but, rather, shows a "snapshot" of how long the call has been holding when the **Holding Calls** window appears.

Message Monitor

Message monitor mode, also known as **live call screening,** lets you hear a caller leaving a message in your mailbox, just as with your home answering machine. Use the **Msg Monitor** command button to turn this feature on or off as desired. When the feature is in use and you are hearing the caller through your speaker, you have the following options:

- Lift the handset to interrupt the call

- Do nothing, in which case the system directs the caller to your voice mail for your later retrieval.

- Click **Mute**/**DND**, which temporarily mutes your speakerphone's microphone (the system continues to record the message to your mailbox).

Missed Call

> **Note:** This works **only** if you are receiving Caller ID service from your provider. Consult your System Administrator for more information, if needed.

A missed call record is generated when someone calling your station hangs up either before, or during, the playback of your mailbox's personal greeting. Clicking **Missed Call** will take you to the **VIP Missed Calls** folder in *Outlook* so you can review your missed calls.

---

[1]   Time is shown in the **Holding Calls** window in **only** a *VIP Professional*-compatible application.

Mute/DND

To disable your handset or speaker microphone during a conversation (either with the handset or speaker), click **Mute**/**DND**.

When your phone is idle and you wish to make sure its calls go straight to voice mail, click **Mute**/**DND** to toggle in or out of DND (do-not-disturb) mode.

> **Note:** If you press **MUTE**/**DND** while your phone is ringing, this forwards the call to your voice mailbox and your station will be placed in DND.

Override Ring

The **override ring** feature lets you place a call — station-to-station, outside line or Esi-Link — or leave a voice message when **another** call is ringing. To bypass an incoming station or line call:

1. Before you begin the call, click **Override Ring** command button.

> **Important:** When you do this:
> • **Don't** take the handset off-hook.
> • **Don't** click **Speaker** or **Headset**.
> • **Don't** press a preprogrammed line key on the phone.

2. Once you receive dial tone, pick up the handset and proceed with your call as you normally would.

The incoming call will be rerouted to the forwarding destination (such as your voice mailbox) your Installer or System Administrator has set for your station.

Overhead Page

If the ESI phone system has been connected to an overhead paging system, you can use that system to page by clicking **Ovhead Page** and making your announcement after the tones. This announcement doesn't go through the actual ESI Feature Phone.

Page

Page zones are set by the Installer and typically represent groups of employees, or physical areas of the company — such as Sales, Accounting, Manufacturing, *etc.*

While the phone is in an idle state, click **Page** to view a list of available page zones; selecting Zone **0** lets you page through the speakers of **all** ESI Feature Phones on your phone system.

Personal Greeting 1, Personal Greeting 2, Personal Greeting 3

These commands will provide for easy activation of one or more of your three possible personal greetings (only one may be activated at a time). Simply click the button designated for the personal greeting you wish to activate. To record a greeting, use either the phone (**PROGRAM 1**) or *VIP* Station Programming (see "Station programming," page 61).

> **Note:** Remember that personal greeting 2 is used with the "reach-me" feature, while personal greeting 3 is used with the AutoPage[1] feature.

---

[1]   AutoPage is not available on IVX S-Class.

Pickup

From your station, you can answer a call ringing at another station or department. Click **Pickup**. A list of extensions appears. Choose the desired extension you wish to answer.

During the system's night mode, if a night bell is in use instead of the night auto attendant, click **Pickup** and select extension **0** to access the ringing outside call.

QuickPage

Normally used by an operator, this key lets you quickly put a caller on hold, and page a station user. While on an outside-line call, you can click **QuickPage** and then select a station number; the system automatically pages the person and forwards the call to the person's voice mailbox if he/she doesn't answer.

Record

Click **Record** either to record a call while it's in-progress or to create a handy voice memo. Recordings are located in the **VIP Recordings** folder in *Outlook* for the user of a *VIP Professional*-compatible application; otherwise, recordings are located in the *Outlook* Inbox. To listen to a recording, double-click its entry in the *Outlook* Inbox (or press your phone's **VOICE MAIL** key.)

> **Note:** If you're a user of a *VIP Professional*-compatible application and require information about the auto-record function, see "Auto-record," page 39.

Redial

Click **Redial** to place a call to the last number called from your station.

Release

VIP's **Release** command button serves several purposes. If you click it . . .

- **. . . When you're connected to a call through the handset** — It disconnects the call and gives you **internal** dial tone.
- **. . . When you're connected to a call via the speakerphone** — It disconnects the call.
- **. . . During call-waiting** — It drops the current call and automatically connects to the waiting call.

Service Observe

Your System Administrator may assign **service observing** capability to those users who need to monitor others' calls silently (*e.g.*, in order to aid in quality assurance of call activity).[1] To begin service observing, click **Service Observe** followed by an extension number or station key. To discontinue observing, click again on **Service Observe** or hang up (or click **Release**). While you observe another station's incoming call, your display shows to whom that station is connected and how long the call has lasted.

Speaker

> **Note:** Not applicable to *VIP Softphone*.

For hands-free conversation, use **Speaker**. When an outside call rings, you can click **Speaker** to connect to the caller via your phone's built-in speakerphone. Or, while using the handset, you can switch a call to the speakerphone by clicking **Speaker** and hanging up the handset. (To revert to using the handset, lift it again.)

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[1] A user can observe only those extensions in the list of observable extensions controlled by the System Administrator.

Store CID

Click **Store CID** to save Caller ID ("CID") information during either (a) an incoming call or (b) playback of a voice message on which the system kept CID data. (See "Contact Management," page 25, for details.)

Transferring calls

If you're not using a **VIP Professional-***compatible application . . .*

If you're **not** using a *VIP Professional*-compatible application, clicking **Transfer** will open a field in the Call Display that lets you enter either an extension or external phone number (if the latter, remember to include the line access code — *e.g.*, "9") as the transfer destination.

> **Important:** The remaining "transferring calls" instructions, beginning below and continuing through page 37, are for ONLY a user of a *VIP Professional*-compatible application.

Transferring to an extension or external number

While on a call, click **Transfer**. This presents a list of available extensions (*right*). By default, the names are listed alphabetically, but you can sort the list by any of the three columns by clicking the desired column's heading.

Notice the **Display** area of this list, where you can also select **External Numbers** to enter a phone number. A *VIP Professional*-compatible application will "remember" the numbers you enter, and also let you correct a mistyped or changed number directly in the list.
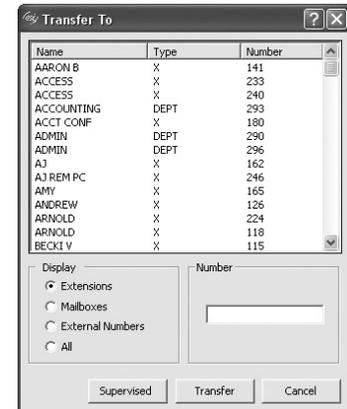
> **Important:** USE OF FEATURES, SUCH AS TRUNK-TO-TRUNK TRANSFER, THAT REQUIRE TRUNK-TO-TRUNK CONNECTIONS WILL INCREASE THE RISK OF TOLL FRAUD. IN NO EVENT SHALL ESTECH SYSTEMS, INC. BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL OR CONSEQUENTIAL DAMAGES WHATSOEVER INCLUDING, BUT NOT LIMITED TO, FRAUDULENT TOLL CHARGES, LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTIONS, OR ANY OTHER COSTS OR DAMAGES RELATED THERETO, ARISING FROM THE USE OF THESE FEATURES.

After selecting the desired "transfer-to" destination, click either **Unsupervised** or **Supervised**:

• **Unsupervised** — Disconnects you while the call is transferred.

• **Supervised** — Allows you to tell the third person that you're transferring a call to that person.

> **Note:** If, during a supervised transfer, the transferred-to person doesn't answer, click **Flash** in the *VIP* Call Display to reconnect to the original caller.

Transferring yourself directly into an extension's voice mail

While the phone is idle, click **Transfer**. This presents a list of available mailboxes *(right)*. By default, the names are listed alphabetically, but you can sort the list by any of the three columns by clicking the desired column's heading.
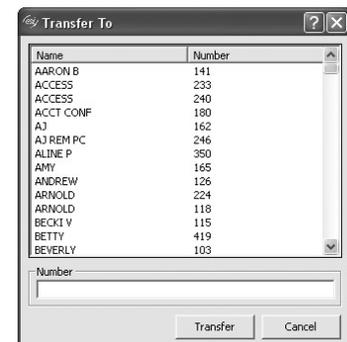
Virtual Answer 1, Virtual Answer 2

> **Note:** Not supported in *VIP Softphone*.

The *Virtual Answer* feature, when activated through either a press of a Virtual Answer Key on the phone or clicking **Virtual Answer** in *VIP*, plays a greeting to a caller when your extension is busy and routes the caller to a desired destination. To use this feature, program a programmable function key with either **5 7 5** or **5 7 6**. Prompts will instruct you in how to record the greeting and program the caller's destination.

The destination can be either the default call waiting or another station; the system takes the caller there after playing the recorded greeting. With call waiting, the system places the caller on hold as call waiting ("camping on") for your station; if the caller can't wait, he/she may do any of the following:

(a.) Press **1** to reach your voice mail.

(b.) Enter another extension.

(c.) Press **0** to reach the Operator.

With another station selected, the call is forwarded to the station. To record the greeting from an idle phone:

1. Press the chosen programmable function key; then press **Record**.

2. Follow the prompts to record the greeting and program the destination.

Sample greetings for Virtual Answer Keys:

*"Hello. This is Harvey. I'm currently on another line, but I'd really like to speak to you. Please hold and I'll be with you shortly. However, if you do not wish to wait on hold, press **1** to leave me a voice message. You may also either dial another extension or press **0** to reach the Operator."*

"Hello. This is Bill. I'm currently on another line, but I have been notified of your call. I am sending your call to our Sales Department administrator for more immediate assistance. Please remain on the line as your call is being transferred. Thank you."

Auto-record

> **Important:**   Because auto-record **requires** a *VIP Professional*-compatible application, **all uses of the term "*VIP*" in this "Auto-record" section refer to the use of such a product.**

When the **auto-record** feature is enabled, *VIP* saves each outside call[1] you make or receive, and then gives you the choice of either (a.) saving the recording in the **VIP Recordings folder** in *Outlook* or (b.) deleting the recording.

When you're connected to a caller on an outside call (incoming or outgoing), the ESI phone system will begin recording. You'll know this because the **RECORD** key on your ESI phone will glow, and the word *RECORDING* will appear on both the *VIP* Call Display and your ESI phone's display.

> **Important:**   If, while you're auto-recording a call, you press either any phone key or click any *VIP* button (*e.g.*, **Record**, **Hold**, **Transfer**, *etc.*), the recording will stop; you then must manually re-start recording by either pressing the phone's **RECORD** key or clicking *VIP*'s **Record** button. (Note that the re-start will create a second recording, rather than adding on to the end of the stopped recording.)
>
> If you take an outside call off-hold or have an outside call transferred to you, the call will be auto-recorded once you've answered it.
>
> While on a conference call, you'll receive more than one pop-up as you add conference members.

Handling an auto-recorded call

Once an auto-recorded call ends, the phone's **RECORD** key will stop glowing. You'll then see a **VIP Auto-record** window *(right)* that gives you details of the call and lets you choose whether to **save** or **delete** the recording:

- If you click **Save**, the recording will be available on the phone system and in the VIP Recordings folder that *VIP* has placed in *Outlook*.

- If you click **Delete**, the recording will be deleted from the phone system and goes to the *VIP* Recycle Bin and your ESI phone system's Recycle Bin.[2]

- You can manually archive recordings by using the *VIP* toolbar's **Save As...** button.

New recordings

What if you get calls while *Outlook* (and, therefore, *VIP*) aren't running? Once you re-open *Outlook* and then launch *VIP*, if it detects new recordings in the VIP Recordings folder, you'll see this window *(right)*.

Clicking the **VIP Recordings** button takes you directly to the folder.

---

[1]   This feature doesn't auto-record internal calls. However, as always, you still can record an internal call using your ESI phone's usual call recording function and, if you choose, archive the recording in *VIP* or *VIP Professional*.

[2]   If you're unfamiliar with how to use the ESI phone system's Recycle Bin, consult your *User's Guide* or visit *www.esiusers.com*.

Recordings threshold

Each auto-record-enabled station on your phone system has a limit, called the *recordings threshold*, to how many recordings (**both** auto-recordings **and** usual ESI phone system recordings) it can accumulate without deleting them. The recordings threshold varies by ESI system (if you don't know which system your organization has, consult your System Administrator).

VIP will provide appropriate warnings as you near or reach your station's recordings threshold — and, if necessary, advise you how to resolve the situation if you reach or exceed the threshold (and, thus, lose the ability to record additional calls with **either** *VIP* or your phone's regular recording capability). Simply stated: when you get to this point, you'll have to go into *VIP* (or your ESI phone's voice mailbox) and delete one or more recordings from the system.

These first two windows show what you'll see if your station is near, but hasn't reached, the recordings threshold — *i.e.*, you're getting close to the point where the system won't record any more calls for you until you delete recordings.

If you initiate or receive an outside call and it causes your station to reach the threshold, you'll see this notification. (Of course, you can continue with the actual call.) Either during this call or afterward, when the phone is idle), you must delete some of your recordings from the system before **either** any additional outside calls will be auto-recorded **or** you can manually record any more calls.

If you don't delete any recordings after having gotten the message discussed above, you'll see this notification the next time you make or receive an outside call. You now must delete at least five of your existing recordings from the phone system to recover the ability to record calls at all (automatically or manually).


Note: Even if you archive recordings, you must still delete them when instructed by these messages. Adequate space remains on the system, so your conversation won't stop recording mid-way through, even when you're nearing your recordings threshold.

VIP PC Attendant Console

VIP PC Attendant Console includes not only all *VIP Professional* features but also an expanded display of incoming calls and holding calls, plus up to 200 virtual buttons. *VIP PC Attendant Console* lets you manage your organization's phone traffic while keeping your eyes on your PC screen.

> **Note:** These *VIP PC Attendant Console* instructions assume you are the attendant using this application.
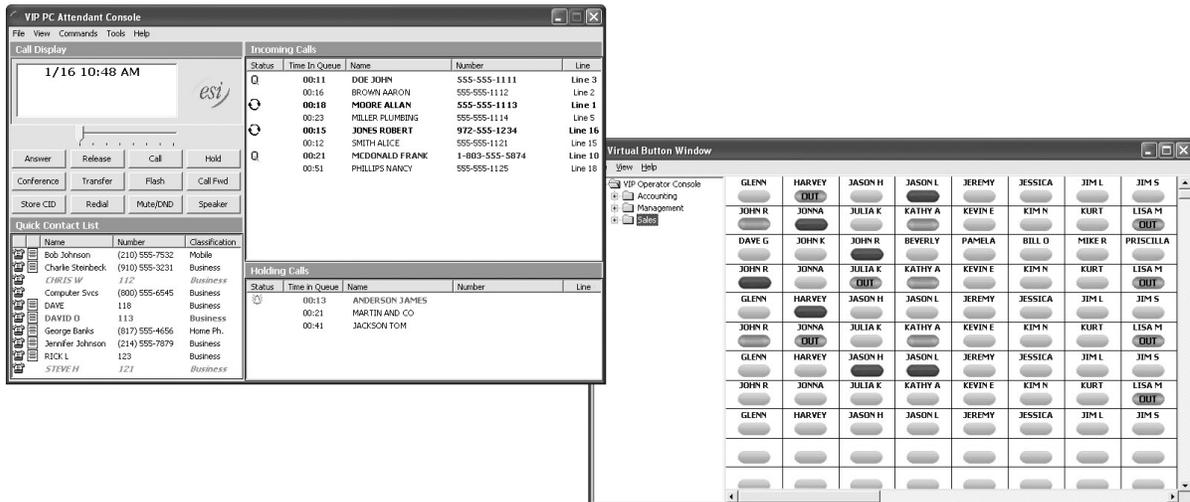
Attendant call handling

Inbound and answering calls

The **Incoming Calls** list shows a minimum of 10 calls at one time. The **longest-ringing call (LRC)** to your station will appear in chronological order in the **Incoming Calls** list, and the Call Display will display the Caller ID and line information. To answer the LRC, you may do any of these:

• Click **Answer**.

• Click **Headset**.

• Pick up your phone's handset.

Once answered by any of these methods, the call disappears from the **Incoming Calls** list (but still appears in the Call Display) and you handle it as you would any other call — by clicking **Hold**, **Transfer**, **Release**, *etc.*

To choose a call other than the LRC, double-click its Caller ID line in the **Incoming Calls** list.

> **Note:** In this event, the LRC you didn't answer stays in the **Incoming Calls** list. The phone "stops ringing" at this point (because, even though the LRC didn't get answered, your answering the other call makes your station officially busy). If another call comes in, your phone will produce a subdued ring.

When you release the current call, the next LRC will ring your phone and appear in the Call Display and **Incoming Calls** list.

Call forwarding

You can call-forward your station as described for the *VIP* **Call Forward** command (page 30), or —when you place your cursor on an empty place in the Call Display and drag your cursor (*i.e.*, while holding down the mouse button) to the **Virtual Buttons Window** button representing your desired call-forwarding destination. Once your cursor is over that button, release the mouse button. Your Call Display will then show your call-forwarded status. To disable the call forwarding, right-click in the Call Display and select **Clear Fwd**.

Transferring calls

While on a call, select its Caller ID information in the Call Display and drag it onto any of the up to 200 virtual buttons — thus performing an **unsupervised transfer**.

You also can transfer other callers from the **Incoming Calls** and **Holding Calls** lists to virtual buttons while on a call with someone else.

Handling calls without answering

When a call is in the **Incoming Calls** list or **Holding Calls** list, you can perform an **unsupervised transfer** by dragging its Caller ID line onto one of the 200 virtual buttons.

> **Example:** Jones Plumbing is ringing in the **Incoming Calls** list. You know that the call is for Mary in Accounting, and you want to perform an unsupervised transfer of this call to her. **Don't** double-click the Jones Plumbing call (which would answer it) but, instead, drag it (with the mouse button down) until the mouse cursor is over your virtual button for Mary, then drop it there (releasing the mouse button). This transfers the call **directly** to Mary without your having spoken to the caller.

If the destination extension either goes into DND mode or becomes busy as you're dropping the call onto the extension's virtual button, the call will follow the usual routing for that extension under such conditions (for example, to voice mail).

If you begin to drag a call but either never drop it onto a button or accidentally let go of the mouse button before dropping it onto a virtual button, the call returns to its original location — either **Incoming Calls** or **Holding Calls**.

Re-routed calls

Calls that have been to you more than once appear in the **Incoming Calls** list in **bold black** type to alert you that you've already handled it at least once.

> **Example:** Jones Plumbing calls, and either selects to speak to you (by pressing **0**) or is transferred to you. You answer the call and transfer it to another extension. That station never answers. Jones Plumbing doesn't want to leave a message, and thus presses **0** to get back to you. This call will appear in **bold black** in the **Incoming Calls** list because you already handled it at least once.

Holding Calls list

The **Holding Calls** list will always show at least five calls that are on hold. They will appear in the order of longest-held call first. The **Holding Calls** list will display all calls on system-wide hold and your attendant station's exclusive holds. To pick up a held call, double-click its Caller ID line in the **Holding Calls** list. You can take a call off hold in whatever order you desire. Also, just as with incoming calls, you can drag a held call directly to a virtual button.

A **recalling** held call — a held call that didn't get answered by the destination to which you transferred it and thus is coming back to you — will remain in the **Holding Calls** list, but its Caller ID listing will change to **bold red** text. If you take the call off hold recall and then put the call back on hold, the call is considered a "new" hold and thus is listed again in non-bold black and its counter resets to *0:00*. If a recalling held call isn't answered, it follows the routing of the extension that put it on hold and no longer appears in any *VIP* window.

Tenants

When applicable[1], the **Incoming Calls** and **Holding Calls** lists include **Tenant** columns, so that you can tell which tenant is receiving calls. For each call on each list, the tenant's name (up to 10 characters in length) appears.

Outbound calls

Use of *VIP PC Attendant Console* has no effect on how you make outbound calls in *VIP*. You can still place the cursor in the Call Display and dial a number, double-click a contact in the Quick Calls List, or double-click a virtual button.

Attendant queue

The **attendant queue** is used solely by the *VIP PC Attendant Console* user.

When a call reaches the **Incoming Calls** list, it has a pre-determined amount of time[1] before it "times out" and is routed to the attendant queue. The call remains in the **Incoming Calls** window but now appears in **bold blue** text with a "Q" icon; the system automatically plays a prompt that tells the caller all attendants are busy and asks the caller to stand by.

You can place a call directly into the queue — "force" it into the queue — by right-clicking on its Caller ID listing and selecting **Place in Attendant Queue**. That way, if you already know you can't get to the caller immediately, you don't have to make the caller wait until the call "times out" to get into the attendant queue.

Incoming Calls

Status	Time In Queue	Tenant	Name
Q	00:11	DOE JOHN	DOE JOHN
	00:16	CITY INSUR	BROWN AARON
☎	**00:18**	**DAVIS CPAS**	**MOORE ALLAN**
	00:23	CITY INSUR	MILLER PLUMBING
☎	**00:15**	**FINANCIAL**	**JONES ROBERT**
	00:12	DOE AND CO	SMITH ALICE
Q	00:21	FINANCIAL	MCDONALD FRANK
	00:51	DAVIS CPAS	PHILLIPS NANCY

Holding Calls

Status	Time in Queue	Tenant	Name
☼	00:13	DOE AND CO	DOE JANE L
	00:21	CITY INSUR	EMERSON JOSEPH
	00:41	DAVIS CPAS	SW ASSOCIATES

---

[1]   This is a parameter set by your installing Certified ESI Reseller. If you have questions about the setting, have your System Administrator contact your Reseller.

Virtual buttons

Accessible from *VIP PC Attendant Console*'s **Tools** menu, the **Virtual Button Window** (shown in part, below) includes 200 virtual buttons that you can program just as you would the keys for your ESI phone.
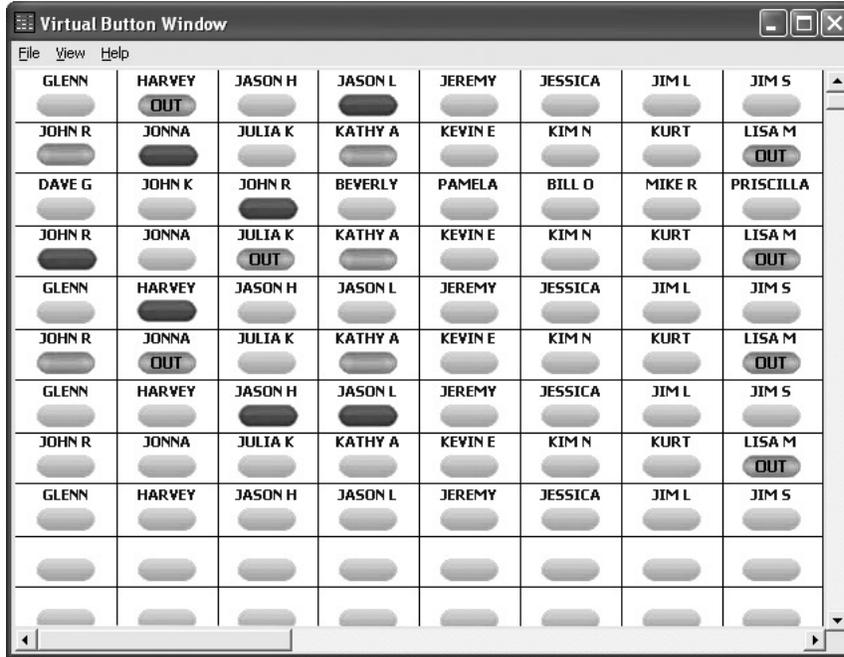
> **Note:** *VIP PC Attendant Console* isn't synchronized with any ESI physical Expansion Console.

When *VIP PC Attendant Console* is first installed on your PC, it has blank (clear) virtual buttons. It's up to you to "populate" (program) the buttons. (When first launched, *VIP PC Attendant Console* automatically opens in programming mode but, if you need to reach this mode, click **View** and then **Program**.) You'll see the same list of choices as you do in Station Programming, so just drag-and-drop from the list to program the keys. (See "Feature Keys," page 64 if you need to review.) Menu items let you change the view, edit a virtual button, create folders, sort, and so on. A right-click contextual menu provides the same results.

> **Note:** The **Undo**/**Redo** option under the **View** menu goes backward or forward for only one change.

The **Virtual Button Window**'s oval buttons work the same as do the programmable keys on the 48-Key Feature Phone. Each displayed station button is color-coded to increase easy, at-a-glance recognition of its status:

When the oval icon is . . .	The associated station is . . .
Silver gray	Idle
Red	In use
Amber	In DND mode

Additionally, in systems with ESI Presence Management[1] installed: when a station is scanned out, the oval icon is **amber** and displays the word *OUT* inside the icon.

> **Important:** Status will not be displayed for remote stations, departments, or mailboxes connected to a system over an Esi-Link network.

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[1] For information about this product, see *www.esi-estech.com/presence*.
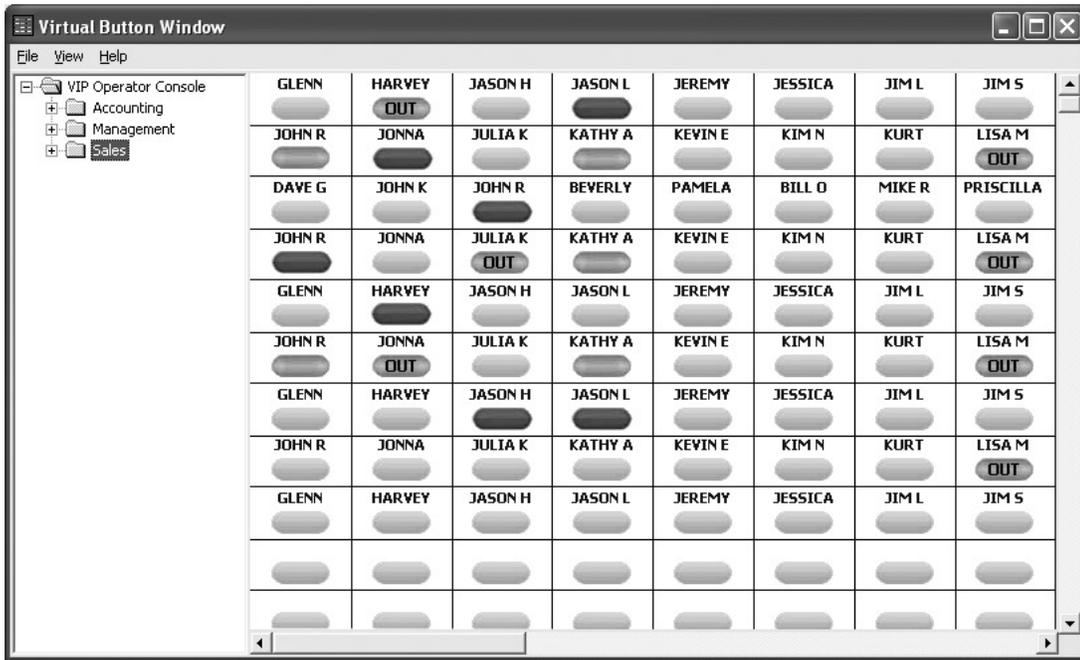
Virtual button programming and folders

Folders let you sort the virtual buttons into groups for easier on-screen viewing. To create folders:

1. Program as many of the 200 buttons as needed, so that they contain all the buttons you'll later break into folders/groups.

2. Click **View**, then **Folders**, which produces the *folder view* shown in the example below.

3. The **root** folder contains all 200 virtual buttons (programmed or not).

   a. Right-click the root folder and choose **Add Folder** from the pop-up menu.

   b. Type the desired name of the new folder — *e.g.*, **Sales**, **Accounting**, **Customer Svc**, *etc.*

   c. Drag buttons from the root folder to the new folder.

> **Note:** The buttons you drag are only **copied**; therefore, the root folder always contains all the buttons. You're **not removing** buttons from the root folder; you're only **copying** them into folders. Thus, a virtual button can be in multiple folders (for example, if Bill is both part of Sales and a Senior Manager, you can put him in a **Sales** folder and an **Executives** folder) because, as far as the system is concerned, it's still the same virtual button. The folders are strictly a visual device to help you view and use the buttons more efficiently.

4. Continue creating and populating folders as described in these steps.

*Multiple-button programming (*VIP PC Attendant Console *only)*

> **Note:**   An ESI-1000 or ESI-600 supports a 400-button Virtual Button Window; any other *VIP PC Attendant Console*-compatible ESI system supports a 200-button Virtual Button Window.

In one operation, you can program **multiple** buttons in your Virtual Button Window. This is a great time-saver, particularly if you have many extensions or lines to manage.

1. Click **View**, then **Folders** to reach the folder view.

2. Select the desired items (extensions, lines, or departments) from the pane on the left:

- Select a **range** by clicking the **top** item in the desired range, holding down **Shift**, and clicking the **bottom** item in the range.

- Select multiple **individual** items (*i.e.*, **not** a range) by holding down **Ctrl** and clicking the items.

3. "Drag-and-drop" the selected items rightward onto the buttons.

Similarly, you can select multiple **buttons** — use the same process described in step 2, *above*, depending on whether you want to select a **range** of buttons or multiple **individual** buttons — and drag-and-drop them all leftward "into" an item (such as a "Sales" or "Customer Service" folder), easily populating the item.

VIP ACD Agent

VIP ACD Agent builds on *VIP Professional*'s features by adding specific tools for an ACD department agent, including a department selector and pre-populated agent lists with station status.

Note:	These *VIP ACD Agent* instructions assume **you** are the agent using this application.
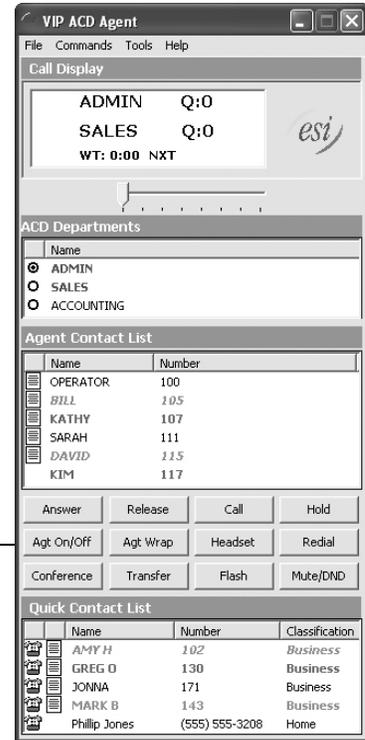
Department selection

The departments of which you're a member will be listed in the **ACD Departments** area under the volume bar.

To select a department, click the "radio button" next to the department's name. This will automatically populate the **Agent Contact List** (see page 48) as appropriate for that department.

Department log-in

To log into a department:

   1. Select the desired department as described in "Department selection," *above*.

   2. Click **Agt On/Off**. Notice that the department name in the **ACD Departments** list turns **green**.

Once you're logged in, the **Call Display** will change to show queue and longest wait time.

To log into a **second** department:

   1. Select the desired department as described in "Department selection," *above*.

   2. Click **Agt On/Off**. Notice that the department name in the **ACD Departments** list turns **green**.

Once you're logged into the second department, the **Call Display** will change to show **both** departments, along with the applicable queue and longest-wait-time statistics.

Note:	Switching between the listed departments **won't** automatically log you on or off. To log off from a department, follow the same steps for logging **into** a department: but, this time after clicking **Agt On/Off**, you'll notice that the department name changes from **green** to **black**.

Answering department calls

To answer calls for a particular ACD department, select the desired department by clicking its radio button in the **ACD Departments** list. When a call for that department rings your station, click **Answer** or (if applicable) **Headset**.

You also can use your ESI 48-Key Feature phone, by lifting its handset and pressing **SPEAKER** or (if applicable) its programmed headset key.

Agent Contact List

Once you select the desired department by clicking its radio button in the **ACD Departments** list, the **Agent Contact List** will change automatically to show all the agents assigned to that department.

The **Agent Contact List** shows the following station status:

• **Red** — Off-hook.

• **Orange** — DND.

• **Orange** *italicized* — Off-premises.

You can contact an agent on the **Agent Contact List** in either of the following two ways:

• Double-clicking the agent's name on the **Agent Contact List**, to connect to the agent's extension.

• Single-clicking the "memo" icon next to the agent's name in the **Agent Contact List**. This will display a text-message window.[1]

If you have an agent listed in your **Quick Contact List**, too, you can either keep the agent in both lists or delete the agent from the **Quick Contact List** so the agent is present in only one list. (You can't delete agents from the **Agent Contact List**; the system auto-populates that list.)

Command buttons

For users of *VIP ACD Agent*, some of the call command buttons will appear pre-populated with the most useful commands for an agent — specifically, **Agt On**/**Off**, **Wrap**, and **Headset** (as shown on page 47).

The command buttons won't pre-populate if you've used any *VIP* applications where the command buttons were customized.

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[1] Refer to "Text-messaging," page 23.

VIP ACD Supervisor

VIP ACD Supervisor is an extension of *VIP Professional* that adds the following features:

• Real-time statistics

• Agent lists which:
  – Show logged-in status, call status with Caller ID[1] and duration.
  – Allow single-click access to service observing agents on calls.
  – Provide double-click calling of an agent's extension.
  – Allow single-click access to text-messaging agents.

• Report selector (reports are selectable in hourly, daily, weekly, or monthly increments):
  – Agent Detail Report
  – Agent Summary Report
  – Department Detail Report
  – Department Summary Report
  – Abandoned Call Report
  – CO Line Summary Report

Due to the unique nature of *VIP ACD Supervisor*, ESI provides a separate *Setup and User's Guide* for that product (ESI # 0450-0986).

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[1] For logged-in agents only.

VIP Softphone

Esi-Check indicator

Note: This product is for use with **only** ESI Communications Servers.

VIP Softphone combines the capabilities of an ESI IP Feature Phone II and *VIP Professional* on your desktop or laptop PC. Just plug in your USB headset (see "Using USB headsets with *VIP Softphone*," page 51), launch *Outlook*, and you're ready to handle calls directly on your PC. This is particularly helpful if you're on the road or in a cramped workspace.

Local and remote use

VIP Softphone is licensed for either **local** operation on your LAN or for **remote** operation (such as for a home office, branch office, or use by a "road warrior"). Whether local or remote, *VIP Softphone*'s call handling capabilities remain the same. Text-messaging is the same, also, except that text-messaging via Esi-Link isn't supported.

Esi-Check indicator

As compared to *VIP Professional,* the **Call Display** of *VIP Softphone* has one additional feature: the **Esi-Check indicator** (shown in the example, *right*, as a square with the ESI logo).

The color-coded Esi-Check indicator shows the quality of the network link — green for good, yellow for fair, or red for poor — so you can instantly see when the link quality has changed, such as during heavy traffic on your LAN[1] or if your Internet connection has difficulty.

Note: Because the quality of the network link will affect the quality of your *VIP Softphone* audio, you should contact your System Administrator or IT staff if the Esi-Check indicator isn't usually green.
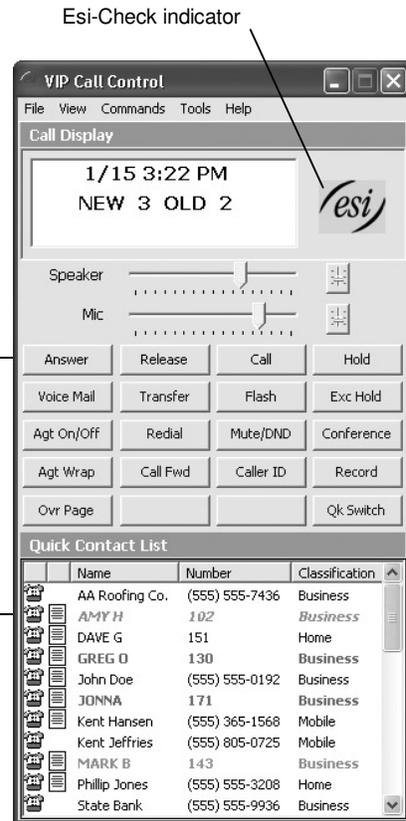
Virtual Buttons window

The **Virtual Buttons** window provides single-click, color-coded access to 30 extensions, voice mailboxes, departments, and speed-dial numbers.

The **Virtual Buttons** window's oval buttons work the same as do the programmable keys on the 48-Key Feature Phone. Each displayed station button is color-coded to increase easy, at-a-glance recognition of its status:[2]

When the oval icon is . . .	The associated station is . . .
Silver gray	Idle
Red	In use
Amber	In DND mode

Additionally, in systems with ESI Presence Management[3] installed: when a station is scanned out (*i.e.*, the station's user is off-premises), the oval icon is **amber** and displays the word *OUT* inside the icon.

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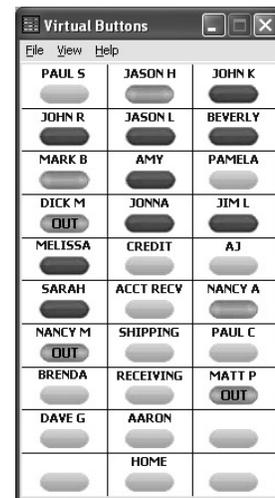
[1] Local area network.
[2] Status will not be displayed for a remote extension connected to your phone system via Esi-Link.
[3] For information about this product, see *www.esi-estech.com/presence*.

Dial Pad

The **Dial Pad** window gives you **tone-dialing** (DTMF) capabilities. This is useful when you're calling into the ESI system's auto attendant or using an IVR[1] phone system (examples of IVR include automated long-distance directory assistance and airport information systems).
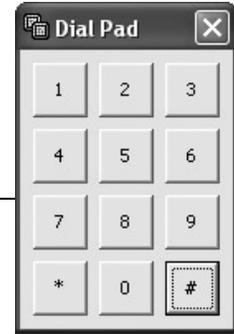
Using USB headsets with *VIP Softphone*

VIP Softphone requires a USB headset for proper operation. The listed headsets are designed specifically for VoIP applications such as *VIP Softphone.*

Please note that not all headsets work with *VIP Softphone*. ESI has tested, and therefore can recommend as acceptable, the following USB headset models:

Manufacturer	Model	Connection	Description
GN Netcom	GN-USB-01 *(Consists of GN 8110 USB[xp] adapter and GN 2200 headset)*	Wired	• "Over-the-head" with noise-canceling microphone. • An office model with convenient quick-disconnect feature that doesn't require shutting down *VIP Softphone*.
Plantronics	DSP-400	Wired	• "Over-the-head" with noise-canceling microphone. • Folding model, suitable for travel.
	CS50-USB	Wireless (900 MHz)	• "Over-the-ear" or "over-the-head" with noise-canceling microphone and TIA810a compliance for echo elimination. • An excellent office model with a 200-ft. range.
	Voyager™ 510-USB	Wireless Bluetooth®	• "Over-the-ear." • Small and light, with a 33-ft. range. • May be used with *VIP Softphone* or a Bluetooth-compatible cell phone.

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[1] Interactive voice response.

Special options

VIP Outlook options

The following settings are accessed by clicking **Options** on the *VIP* toolbar (which brings up the *Outlook* **Options** window, *right*) and clicking the **VIP** button:

• **Delivery**

• **Extension and network**

•   *VIP* **toolbar**

• **Mini-Alert**

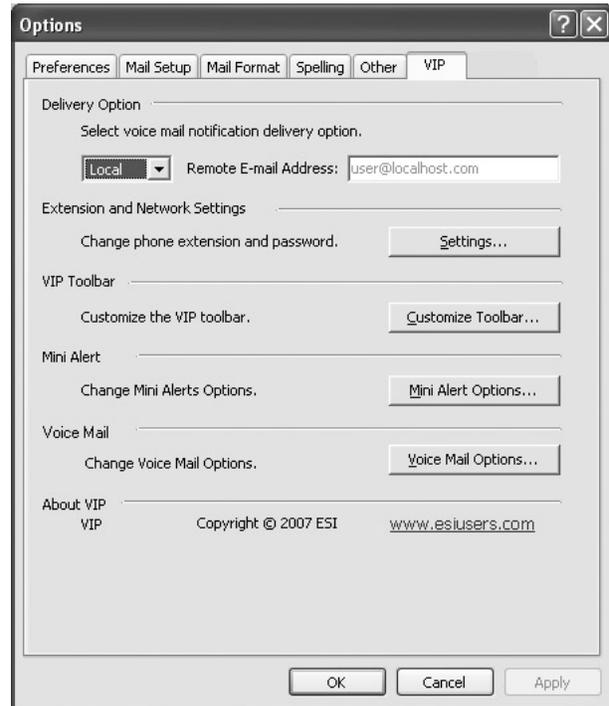• **Voice mail options**

Delivery Option

Voice mail notification delivery option: An introduction

Remote voice mail notification is the ability to set your station options so that when you're out of the office you can be notified of **new** voice messages being left at your station. There are two ways you can be remotely notified of voice messages:

• **External voice mail notification** sends a call to your cell phone and/or pager informing you of a voice mail message. To learn how to set this feature, consult the appropriate phone system *User's Guide* at *www.esiusers.com*.

• **Remote voice mail notification** sends e-mail to any e-mail account to inform you of a new voice mail message. The voice mail is not sent in .WAV file form but an e-mail text message that provides Caller ID, date, and time information only. You then call into the phone system to hear the voice mail. There are three different ways to set this feature – from *VIP*, from your ESI phone, or remotely from any phone.

> **Example:** Assume you have a home e-mail account with AOL. You'll be at your home office for the week, but also want to see a list of who's leaving voice messages on your ESI phone at the main office. Set the appropriate options (which will be discussed next) to have notification sent to your AOL account. Voice messages left on your ESI phone will then appear as e-mail messages at home using your AOL account. This is not actual voice mail that you can play through the ESI 48-Key Feature Phone but, rather, an e-mailed **notification** that gives you Caller ID information of who left the voice mail message. You must call into the phone system to listen to the voice mail message.

The benefit of viewing your voice mail notification is knowing exactly who is leaving a voice mail message before having to call into the system. If you have 10 voice messages, you don't have to listen to each one on the phone to discover whether the voice mail you've been waiting for is there; the list of voice messages in your e-mail account tells you this right away.

Setting voice mail delivery

1. Click **Options** on the *VIP* toolbar (or select **Options** from the **Tools** menu) and then select the **VIP** tab (*right*).

2. Make sure that, under **Delivery Option**, **Local** is selected. Setting it to **Local** will send e-mail messages to your *Outlook* Inbox. (**Default:** Local.)

3. Click **Apply** if you wish to make other necessary setup changes on this tab — or click **OK** if you're done.
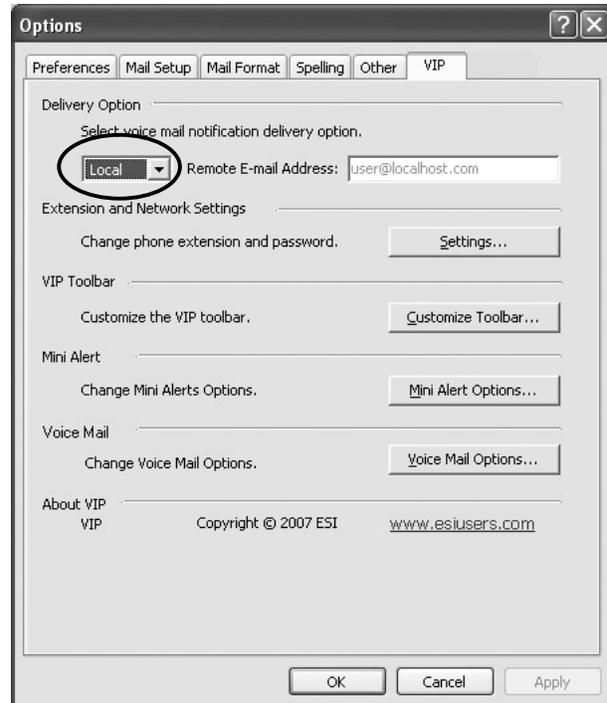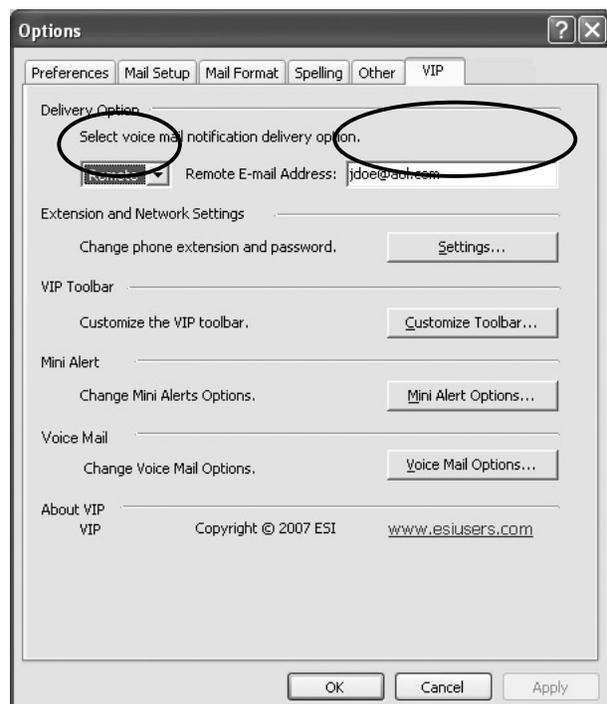
Setting the remote voice mail notification delivery option from *VIP*

> **Note:** You don't need *VIP* on the remote PC to use the remote delivery option. *VIP* is simply one of the applications you **can** use to set this feature.

1. In *Outlook*, click **Options** on the *VIP* toolbar. The *Outlook* **Options** window will appear.

2. Click the **VIP** tab *(shown right)*.

3. Under *Delivery Option*, select **Remote**.

4. In the *Remote E-mail Address* box, type in the e-mail address at which you want to receive notification of new voice mail messages.

5. Click **Apply**.

> **Note:** When you're back at the office, you can play voice mail messages directly from *Microsoft Outlook* by changing the delivery option from **Remote** to **Local**. This is called *unified messaging*, and you **must** have *VIP* installed to use this powerful feature. (If you don't have *VIP* installed you can still get your voice mail by using the ESI Feature Phone.)

Setting the remote voice mail notification delivery option from your Feature Phone

On your ESI phone, you will enable one of the following:

• **Remote voice mail notification** — Receiving notification of a voice mail message, when you're out of the office, in the form of e-mail to any e-mail account. This is not a .WAV file but, rather, a text e-mail that gives you Caller ID, time, and date information.

• **Local delivery** — Receiving actual voice mail messages in your *Outlook* Inbox, when you're in the office; these messages can be played through the 48-Key Digital Phone. This is called *unified messaging,* and you must have *VIP* installed to use this feature. (If you don't have *VIP* you can still listen to your voice mail from your ESI phone.)
Default: Local delivery.

> **Tip:** When accessing this programming option on the phone, the phone system will tell you what setting is already enabled and then gives you one choice to change the setting. Therefore if local delivery is enabled (option 1 on the phone), then your only choice is enabling option 2, remote notification (and *vice versa*).

Enabling remote voice mail notification from your Feature Phone

1. On your ESI phone, press **PROGRAM 6 5**.

2. Press **0**. (The phone's voice prompt may call this "External e-mail notification")

3. You'll be prompted to enter an e-mail address to which the system should send the notifications. (If the e-mail address is already entered, skip to step 4.)

4. Press **#** to confirm.

5. Enter the forwarding e-mail address by using the phone dial pad as follows:

Keypress	Result
#	@
1	. (dot)
0	- (hyphen)
0	_ (underscore)
▼	Previous character
HOLD	Erases entire address

> **Example:** To enter the e-mail address *jdoe@aol.com*, you would enter the following . . .
>
> | Address: | J | D | O | E | @ | A | O | L | . | C | O | M |
> |----------|---|---|---|---|---|---|---|---|---|---|---|---|
> | Entry: | 5 (#) | 3 (#) | 6 (#) | 3 (#) | # (#) | 2 (#) | 6 (#) | 5 (#) | 1 (#) | 2 (#) | 6 (#) | 6 (##) |
>
> For instance: to get the letter **L**, press the **5** key three times (**J K L**). Once the correct character appears on the display, **press # to confirm** and then proceed to enter the **next** character. As you see, this means you must enter **two** pound signs at the end — one to confirm the last character, and one to confirm the entire address.

Characters **not** listed in the table for step 5 — such as **%** or **$** — can't be entered from the Feature Phone. However, you **can** enter these when setting remote delivery from *VIP* (see page 53).

Enabling local delivery from your Feature Phone

1. On your ESI Phone, press **PROGRAM 6 5**.

2. Press **1**. (The system prompt calls this "unified messaging.")

3. Press **#** to confirm.

Setting the remote voice mail notification delivery option from a remote location

> **Note:** For remote e-mail notification of voice mail messages, you must set a forwarding e-mail address from either *VIP* options or your ESI Feature Phone. **You cannot enter an e-mail address remotely.** See "Setting the voice mail notification delivery option from your Feature Phone" (page 54) to enter the forwarding e-mail address from an ESI Feature Phone.

1. Call into the ESI phone system.
2. If the auto attendant's main greeting answers, press ✱ and enter your mailbox number.
3. If the operator or another user answers, have the person transfer you by pressing **VOICE MAIL** and ✱, then pressing your station key (or entering your mailbox number) and then hanging up.
4. If required, enter your password.
5. Slowly press **5 6 5**. The phone system may not recognize all the digits if you dial 565 too fast.
6. Now, use the appropriate following procedure to select either (a.) enable remote voice mail notification or (b.) enable local delivery.

    Enabling remote voice mail notification
    1. Press **0**. (The system prompt may call this "external e-mail notification")
    2. Press **#** to confirm.

>   **Note:** You will not be prompted to enter an e-mail address because you cannot do that from a remote location. You must enter the e-mail address while at the main office or from *VIP*.

    Enabling local delivery
    1. Press **1**. (The system prompt calls this "unified messaging.")
    2. Press **#** to confirm.

Update extension and network settings

This section explains how to update your extension and network settings.

The extension and password you use for *VIP* **must** match your phone system extension and voice mail password. To update your station or network options, launch the *VIP* configuration window by clicking **Options** on the *VIP* toolbar (or selecting **Options** from *Outlook*'s **Tools** menu) and then selecting the **VIP** tab.

Contact your ESI Reseller or your System Administrator if you're unsure of your network information.

1. Click **Extension Settings**. The *VIP* **Extension Settings** window appears.

2. Enter your extension number and current voice mailbox password in the appropriate fields.

3. Enter the network information for each field.

   > **Note:** The **NSP Public IP Address** and **VIP Port** settings (grayed-out in the example shown, *right*) apply only if you're using *VIP Softphone* and the **Operating Mode** is set to **Remote**. Change these settings **only** if instructed by your System Administrator.

4. Click **OK**.

5. When the *VIP* tab re-appears, click **Apply** to make more changes — or click **OK** if you're done.

Notes: If you use the **phone** to change your mailbox password, you must update your *VIP* settings under **Options**.

If you're **not** installing *VIP* for the first time and you change your password via *VIP* user programming, you **don't** have to update **Extension Options**.

Customizing the VIP toolbar

While in the **VIP** tab, click **Customize Toolbar** to see the **VIP Customize Toolbar** window. This lets you select the buttons to appear on the *VIP* toolbar (by default, all the buttons appear).

Mini-Alert Options

While in the **VIP** tab, click **Mini Alert Options** to see a window by the same name *(right)*. It lets you choose whether *VIP* will display the mini-alert when:

- You get an e-mail.

- You get a voice mail message.

- Someone calls you, when you don't answer, but fails to leave you a voice mail message (*i.e.*, you have a **missed call**).

- You have an incoming call (in this case, the mini-alert displays the same Caller ID information as appears in the Call Window).

Voice Mail Options window

By default, voice mails populate the *Outlook* Inbox. However, you can create a **voice mail-only folder** in *Outlook*:

1. Click **Options** on the *VIP* toolbar.
   The *Outlook* **Options** window will appear.
2. Click the **VIP** tab, and click **Voice Mail Options**.
3. Click the **VIP Voice Mail Folder** button and click **OK**.

Now, a **VIP Voice Mails** folder will appear in the *Outlook* Personal Folders list. **All old and new voice mails currently in the *Outlook* Inbox will move automatically to this new folder.**
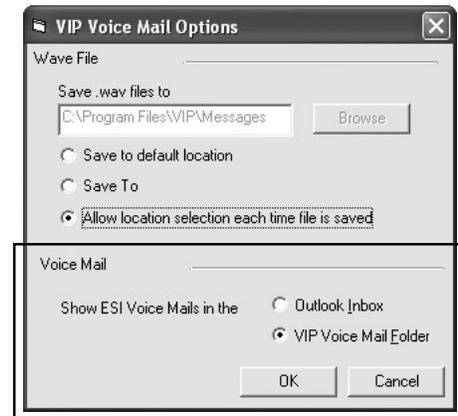
Call Display Options

Click **Options** on the *VIP* **Call Window**, and then choose the
VIP tab to make the following settings in the *VIP* Call Display:

• *Call Window* — Whether the Call Display appears when a
  new call arrives and/or when you initiate an outbound call.

• *When Idle* — Whether the Call Display will remain maximized
  or minimized when your station is idle (*i.e.*, has no call
  activity).

• *Auto Launch* — Whether *VIP* launches automatically
  whenever you start *Outlook*.

• *Commands* — Whether the detailed number lists appear
  when you use the **Transfer** and **Call Forward** commands.

• *General* — **(a.)** Whether small, helpful hints called **"tool tips"**
appear when you hold the cursor (mouse pointer) over specific *VIP* items; these help *VIP* novices but
may annoy *VIP* veterans. **(b.)** Whether **grid lines** appear between items in the Quick Contacts List
and other, similar lists in *VIP*. **(c.)** Whether to show the Quick Contacts List (this selection doesn't
apply to *VIP PC Attendant Console* or *VIP ACD*).

• *Visual Appearance* — Whether the **Call Window** and **Station Programming** window appear in the
default *Windows* appearance, or in one of various "**skins**." (One *VIP* area that isn't "skinned" by such
a choice is the progress window that appears when you launch either the **Call Window** or **Station
Programming**. Also, list views, such as the Quick Contacts List, similarly remain "un-skinned.")
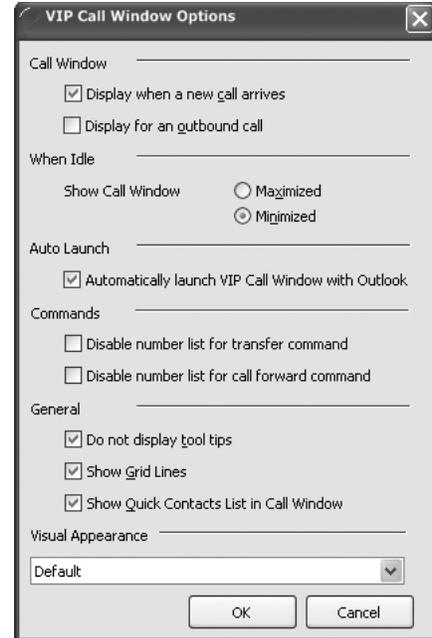
> **Note:** ESI **does not recommend** applying a "skin" to *VIP* if your *Windows* desktop is set to use large or
> extra-large fonts for window headers, button text, and the like.[1] Doing so will cause *VIP* to display
> tool bars and buttons incorrectly.

---

[1] One typically makes these settings in the *Windows* **Appearance** dialog box. For information on how to do this in your specific
Windows version, consult your PC's on-line help for *Windows*.

Additional customization

In the *VIP* **Call Display**, select **Customize** from the *VIP* **Tools** menu to **customize** the following, each of which has its own tab
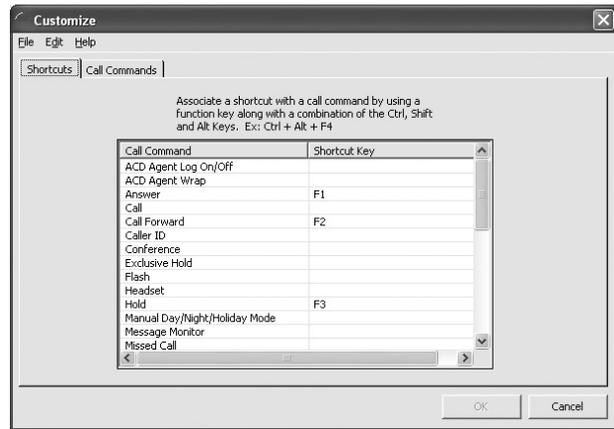
- **Shortcuts**
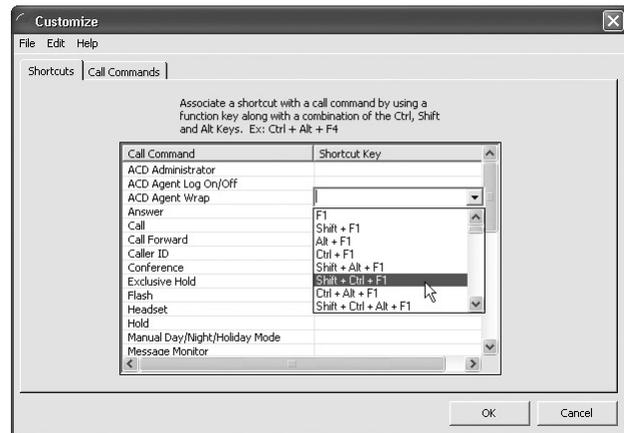- **Call Display commands**
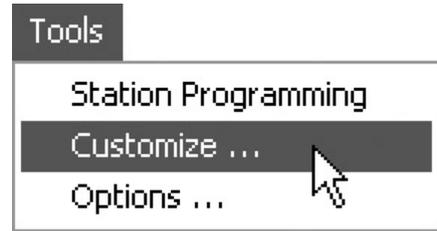
Shortcuts

The **Shortcuts** tab *(right)* lets you assign keyboard strokes to a particular call command.

The various call commands appear on a column on the left side. Already-programmed shortcut keys appear in a column on the right (a blank space means there has been no shortcut key assigned to the call command).

For example, let's say that, whenever you get a call, you want to be able to press a function key (such as **F9**) to answer the call. All you have to do is find **Answer** in the left-side column, click the right-side column across from it and press **F9**. This new selection now appears.

As an alternative, a pop-up menu *(right)* shows various predetermined choices available. Select the one of your choice.

Call Display command buttons

The **Command Buttons** tab lets you select the call command buttons[1] you want to appear in the Call Display. (**Answer**, **Release**, **Dial**, and **Hold** are permanent buttons.) Just drag the desired command from the *Available Commands* list onto a command button; If a command is already there, your new choice will replace it. Except for the permanent buttons, you may drag command buttons around to create an arrangement that suits you (then, click **OK** to complete the change).

You are allowed a total, counting the four permanent buttons, of 16 Call Display buttons in *VIP*, and 20 in *VIP Professional*-compatible applications. (The remaining options are still available under **Commands** on the Call Display menu.)

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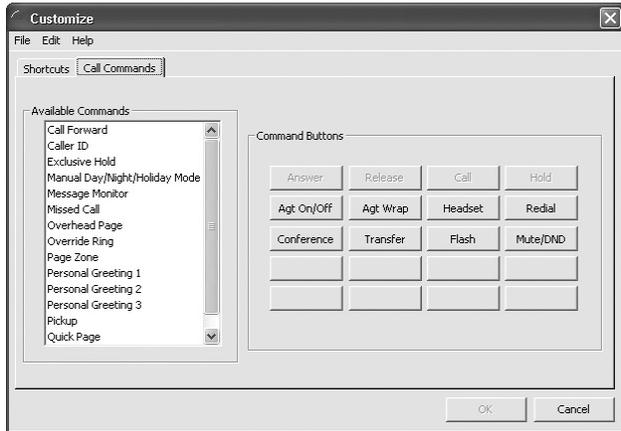
[1] The available commands will depend on which ESI system you have and its configuration.

Station programming in *VIP*

Introduction

VIP's **Station Programming** section lets you program your station from the PC instead of using your phone.

Accessing the Station Programming window

In the *VIP* Call Display's menu bar, click **Tools**, and then **VIP Station Programming**. You will be presented with a **VIP Station Programming** window composed of several tabs. You can move freely through the tabs, choosing your desired options.

> **Note:** Certain items described herein may not be applicable to your installation, depending on your particular ESI system's configuration and how your station is equipped.

Sending changes to your ESI Feature Phone

Clicking **OK** at the bottom of the *VIP* window automatically updates your ESI Feature Phone.

Undoing changes

If you want to revert to the previous programming selections, click **Cancel**. This will undo **only** those changes made since the **last** time you clicked **OK**.

Personal Settings tab

The first tab under **VIP Station Programming** is **Personal Settings**.

Greetings

In the **Greetings** part of the tab, a drop-down menu lets you choose which of the three possible personal greetings you'll use.

If you click **Manage Greetings**, a window by that name appears. It shows you whether each greeting has been recorded and indicates which of the three is the current default. It includes these buttons:

- **Record** — Click to record the selected greeting. A beep will indicate when you should begin speaking into the phone.

- **Play** — Click to play back the selected greeting through the phone.

- **Delete** — Click to delete the recording for the selected greeting.

Reminder

If you often change your greeting (such as to mention the current date and confirm that you're in the office), it can be helpful to set a **reminder**.

In the **Personal Settings** tab, click **Set Reminder** to see the **Set Reminder** window. It gives you three options:

- **Disable** — Disables a currently set reminder.
- **Activate on date/time** — Sets a reminder based on a fixed date and time.
- **Activate hours from now** — Sets a reminder based on a time that is a specific number of hours from when you make this setting.
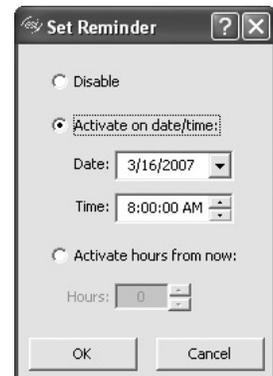
Password

To set a password for your station's voice mailbox, click the **Change Password** button in the **Personal Settings** tab. The **Change Password** window will appear. Just type in a new password and click **OK**.

Security

In the **Personal Settings** tab, click **Security Level** to see the **Voice Mail Security Level** window. The **Voice Mail Security Level** gives you three options regarding access to your station's voice mailbox:

- **No password required** — No password is required for access from any phone.
- **Require a password for remote voice mail access** — Password is required, but only for remote access, from either off-premises or another station in the phone system.
- **Require a password for all voice mail access** — Password is always required.

Station Settings tab

The next tab in the **VIP Station Programming** window is **Station Settings**. This is where you make settings to your ESI phone itself.
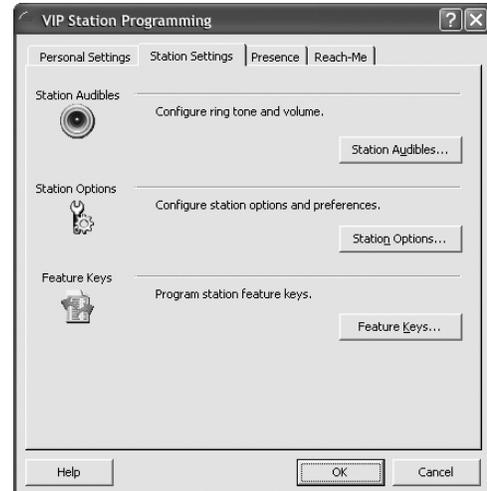
Station Audibles

In the **Station Settings** tab, click **Station Audibles** to configure your phone's **ring tone** and **volume**. The **Station Audibles** window appears.

Under **Ring Tone**, you see your ESI Feature Phone's six possible ringing sounds. Select one and click **Test**, and your phone will ring with that ring tone and at the volume setting set on the sliding **Ring Volume** control.
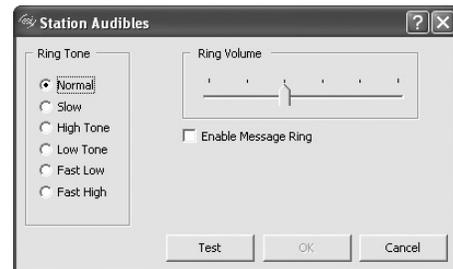
> **Note:** You can't test a different ring tone until after the currently playing one has finished.

If you want the phone to ring momentarily whenever you receive a voice mail (helpful if, for example, you can't stay in the same room with your phone), check the box marked **Enable Message Ring**.

Station Options

Clicking **Station Options** in the **Station Settings** tab brings up this window, which lets you enable and disable several options. Use checkboxes to turn on or off call waiting, background announce, hands-free answer, and message monitor.

If you make mostly outside calls, you may want to set **Dial Tone Preference** to **Outside**; this tells your station to connect automatically to an available outside line; *i.e.,* you don't have to dial **9** (or **8** or **71–76**) before the phone number. Therefore, when you lift the handset or press **SPEAKER**, you will immediately receive an outside dial tone from the highest-numbered line available to you.[1]
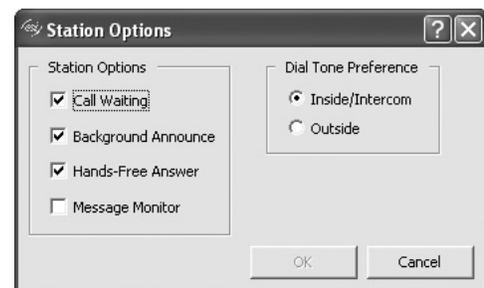
> **Note:** To place an **internal** call while in this mode, press the appropriate station key **or** (a.) press **TRANSFER** to switch to internal dial tone and (b.) then dial the extension number.

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[1] This aspect (*i.e.*, that it's always the highest line available to you) can't be changed.
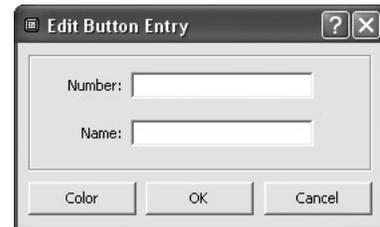
Feature Keys

To assign phone numbers, extensions, mailboxes, or departments to your ESI Feature Phone's 30 programmable feature keys, click **Feature Keys** in the **Station Settings** tab.

In the resulting **Program Feature Keys** window, you'll see a representation of the phone's programmable feature keys. Left of these images is a list, shown in the familiar "folder tree" form you've seen often in *Outlook* and *Windows.* The list shows you the outside lines ("CO lines"), stations, ACD departments, voice mailboxes, and functions you can assign to the programmable feature keys. To make such an assignment to a key, just drag the item over from the list onto the key.
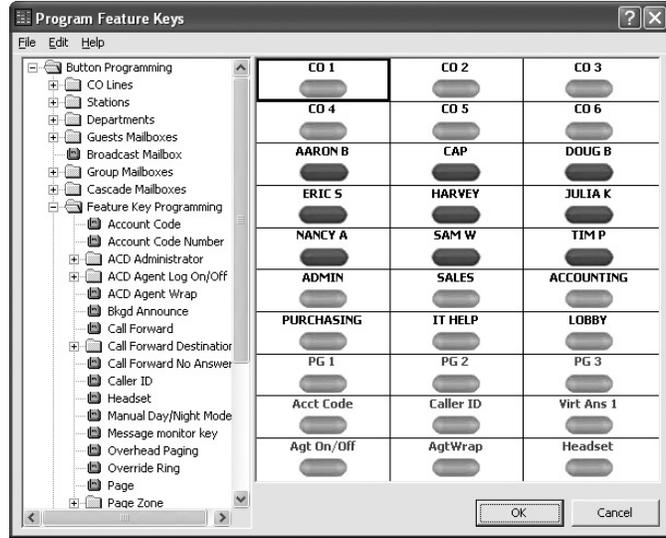
You can also perform **direct programming** of a key by **right**-clicking it and choosing **Edit** from the resulting pop-up menu. You'll see the **Edit Button Entry** window *(right).* Type in the number[1] and the name you want to appear as the key's **label** when you view it in the **Program Feature Keys** window. You may also click **Color** to select a specific color for the label; when you or your System Administrator uses *VIP* to print a paper overlay for your keys, this color will appear for that label.

Note: If you manually enter a number that hasn't been set up on your ESI phone system, you'll see a warning message like this one:

Click **OK** to return to the **Edit Button Entry** window so you can make an acceptable entry.

DSS Keys

If you're using an ESI 60-Key Expansion Console, the **Station Settings** tab will also include an item called **DSS Keys**, which you can click to assign phone numbers, extensions, mailboxes, or departments to the Console's programmable feature keys, just as you did your phone's feature keys in "Feature Keys" (above).

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[1]   If you need the correct number to dial for an ACD department, consult your System Administrator.

Reach-Me tab

> **Note:** If your system is using ESI Presence Management, your settings for its capabilities will supercede these settings. To learn more about this information — as well as additional, special functionality that may be available to you — consult the *ESI Presence Management User's Guide* (ESI part # 0450-0793).[1] If you're not sure whether your system has ESI Presence Management, consult your System Administrator.

Delivery options

This controls **notification** — *i.e.*, how you wish to be notified when you receive a voice mail message. Your choices are:

- **No notification**.

- **Call only**.

- **Page only**.

- **Call and page at the same time**.

- **Call first, then page** — This selection means the system will attempt to notify your phone first, based on a maximum number of attempts set by either the Installer or the System Administrator. If the initial attempts fail, the system then attempts to notify your pager.
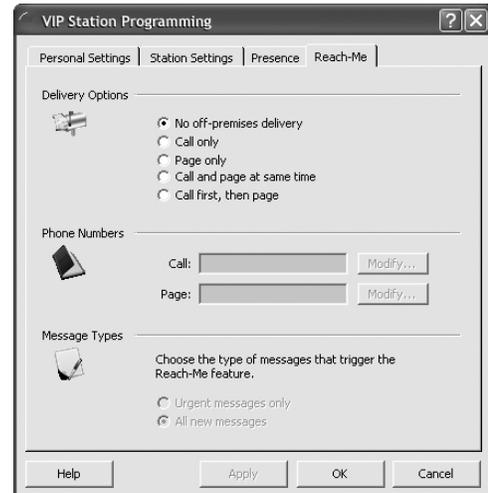
Phone numbers

Enter the outside phone number or pager number desired. Either type in a number or click **Modify** to see a list of previously entered numbers.

Message type

You can have **all** new voice messages delivered, or choose to have only **urgent messages** delivered. If you choose **Urgent messages only**, your personal greeting must include instructions for the caller to press **2** to mark the message as urgent.

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[1] Downloadable from *www.esiusers.com/downloads.*

Presence tab

> **Important:** The **Presence** tab appears only if ESI Presence Management[1] is installed on your ESI phone system.

Because ESI Presence Management tells your system whether you have "tagged-in," these settings let you determine which voice mail and notification settings the system should use for your extension, depending on your presence or absence. This means you now have one less thing (*i.e.*, changing settings) to remember to do when entering or leaving the facilities, even if it's only to go out to lunch — and it'll be particularly helpful if you're in and out of the office a lot.

Entry Settings

In this part of the **Presence** tab, click **Modify Entry** to see the **Entry Settings** window, which lets you determine the following settings for the system to use when you're **on**-premises ("tagged-in"):

• **Notification** — How you wish to be notified whenever you receive a voice mail message or outside phone call. Your choices are: *No Action*, *Phone*, and *Pager*.

• **Personal Greeting** — Which personal greeting the system should play for you. (If you click **Record**, *VIP* presents the **Manage Greetings** window for recording, deleting, and playback of greetings; see page 61.)
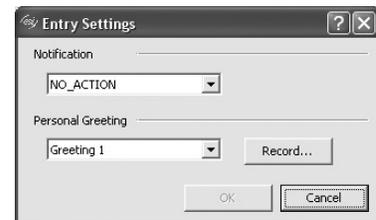
(Continued)

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[1] If you're not sure whether ESI Presence Management has been installed on your system, consult your System Administrator. To learn more about ESI Presence Management, contact your Certified ESI Reseller or visit *www.esi-estech.com/presence*.

Exit Settings

Similarly, this part of the **Presence** tab lets you set how the ESI phone system should handle your calls when you're **off**-premises ("tagged-out").

In addition to the **Notification** and **Personal Greeting** choices described under **Entry Settings** *(page 66)*, the **Exit Settings** window lets you choose either (a.) sending your incoming outside calls to voice mail or (b.) forwarding them. You also can choose to do neither.
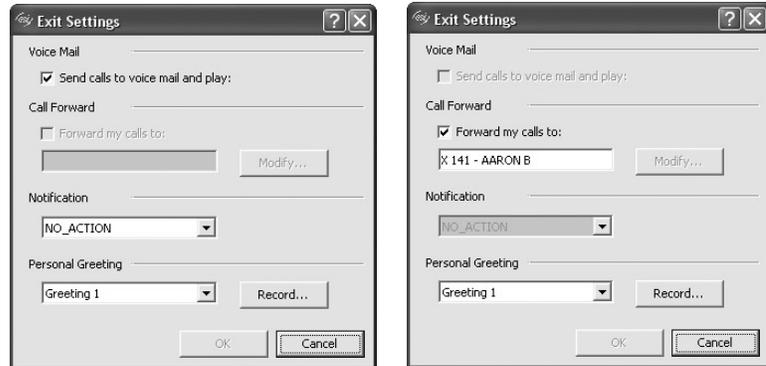
- When **Send calls to voice mail and play** is checked, the system automatically sends your incoming outside calls to voice mail (with no rings), just as if your phone were in DND mode.

- When **Forward my calls to** is checked, the system automatically forwards your incoming calls to the destination you provide. You can either type in a phone number or click **Modify** to see a list of system extensions, departments, and mailboxes from which you can select a destination.

- If neither box is checked, the system won't automatically change your call-handling status when you "tag out" to go off-premises.

Quiet Time

The last selection on the **Presence** tab, **Quiet Time**, affects only notification. It allows you to set time periods during which the system won't try to notify you when you receive voice messages or outside phone calls. For example: if you've specified your home phone number as your call-forwarding destination in **Exit Settings**, *above*, you'll probably want to make sure the system doesn't ring your phone late at night.

To set quiet time for a day, do **one** of the following:

- Check its **All Day** checkbox (*e.g.,* as you might do on a weekend or holiday if you're not on-call)
  or

- Check the day's checkbox (such as for **Monday**) and enter a **Start** and **End** time for that day.[1]

In the example at *right*, the person has set quiet time on Monday through Thursday from 12:00 midnight to 8:00 AM, on Friday from 11:00 AM to 12:00 noon, and all day both Saturday and Sunday.

You can set only one time period per day. For example: you can't set two quiet times for Monday, such as one for 9:00 AM to 12:00 noon and another for 4:00 PM to 6:00 PM.

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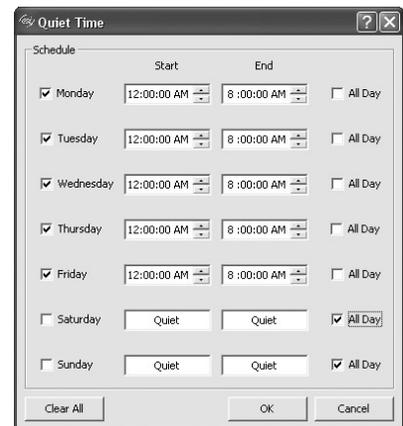
[1] Enter midnight as *12:00 AM* and noon as *12:00 PM*.

Troubleshooting

Troubleshooting chart

Issue	Solution
You see an error message, "Timed out trying to configure TAPI line…"	Verify that: • You have an ESI 48-Key Feature Phone. • Your station has a password set (**PROGRAM 5 1**) and that it matches the one entered in *VIP* **Extension Options**. • Your Station Administrator has given your station access to use *VIP*. • The NSP IP address and port number that your installing ESI Reseller entered in the ESI phone system matches the one entered in *VIP* **Network Options**.
Notification messages do not appear in the *Outlook* Inbox.	Verify the password on your phone (**PROGRAM** then **51**) matches the password and extension set in *VIP* (see page 56)
	Verify that the appropriate delivery option is set (see "See voice mail delivery," page **53**).
Can't hear messages being played.	If using the speaker, verify that the handset is on-hook.
	Verify that your phone is nearby, and your speaker volume is turned up.
	Make sure your phone is **not** in headset mode.
VIP toolbar is missing	Verify that only one instance of *Outlook* is running (if necessary, check the *Windows* taskbar). *VIP* will run in only the first instance of *Outlook*.
	Check to see if the *VIP* toolbar is "floating.".
	Right-click the *Outlook* toolbar and verify that **VIP** is checked.
When you double-click a voice mail notification to play a voice mail, the message fails to play and a window opens.	This may occasionally occur when the system is particularly busy. Use the **Play** button to play messages — **or** wait a few seconds, and then try double-clicking the notification again.
Right-clicking a voice mail notification does not work (does not bring up the context menu).	This can occur when *Outlook* first opens (it's normal for *Outlook* and *VIP* to take a few seconds to synchronize). If this occurs, wait a few seconds and try again.
VIP call activity folders fail to work properly.	Make sure you didn't rename or move any *VIP* call activity folder (**Call Log, Missed Calls, Recycle Bin**); either action will render the folder unable to synchronize with the phone system any longer. (To restore a folder to its original location and name, you must repair the *VIP* software; see "Repairing *VIP*," page 71.)
Notification messages appear in the *Outlook* Inbox after they are moved to another folder.	*VIP* doesn't support *Outlook* Inbox "rules" that manipulate the message (*e.g.,* move or delete it). If a *VIP* message is moved to another folder, either manually by the user or by *Outlook* rules, the system will restore the message to the *Outlook* Inbox during the next refresh cycle.

(Continued)

Troubleshooting chart *(continued)*

Issue	Solution
There are two *VIP* toolbars.	Right-click the *Outlook* toolbar and unselect **Hotbar**.
You cannot dial a Contact from either *Outlook* or the *VIP* Quick Contact List.	Verify that *Outlook* dialing rules are set and that **ESI VIP TAPI Line**[1] was selected under *Outlook* **Dialing Options** (see page 12).
You see an error message, "Timed out trying to Connect to ESI NSP at …"	Verify that the correct information is entered under **VIP Extension Settings** (see "Update extension and network settings," page 56). If it is, contact your Reseller to verify that system programming is accurate.
You see an error message, "Call Processing Reported Error: …"	Your voice mailbox is being accessed by more than one location (another phone or a remote location). If your voice mailbox is accessed, your Feature Phone's blue **VOICE MAIL** key will be lit. Before you can listen to messages, the **VOICE MAIL** key must be blinking or off (*i.e.*, not lit).
	Verify that you have the correct extension listed in **Extension Options**. If you do, check whether someone else has your extension listed in his/her setup.

You see an error message, "A system component, RPC, required..."	This tends to occur during use of *Outlook 2003* in *Windows XP*. Remedying this involves using the *Windows Registry Editor*. Follow these instructions **exactly** as shown [especially step 4]:
	
	1. Click the *Windows* **Start** button, then **Run**. The **Run** window will appear with a blank **Open** box.
	2. In the **Open** box, type **regedit** and then click on **OK**. This will start the *Registry Editor*.
	3. Go to *HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Rpc\ClientProtocols* and view the **keys** on the right.
	4. **If they're not present,** add the following keys:
	`"ncacn_np" = "rpcrt4.dll"`
	`"ncacn_tcp" = "rpcrt4.dll"`
	`"ncadg_ip_vdp" = "rpcrt4.dll"`
	`"ncacn_http" = "rpcrt4.dll"`
	5. Save your changes (if you make any) and then close *Windows Registry Editor*.

You receive a runtime error when launching *VIP* applications (*e.g.*, the Call Display or user programming). **or** Dragging an *Outlook* contact to the Quick Contact List either has no effect or causes the Call Display to crash. **or** You receive an error message about the "MDAC file."	1. Close *Outlook*. 2. Go to *www.microsoft.com/data* and download Version 2.5 (or higher) of the MDAC[2] file. Follow the installation instructions on the Web page from which you download the MDAC file. 3. Reopen *Outlook*.

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[1] In certain versions of *VIP*, the item may say **ESI VSP IP Line** or **ESI VIP Service Provider**, rather than **ESI VIP TAPI Line.**
[2] *Microsoft Data Access Components*.

Troubleshooting chart *(continued)*

Issue	Solution
The *VIP* Call Display doesn't display correctly — borders are missing, buttons are misproportioned, *etc.*	Adjust your PC's display properties by right-clicking the *Windows* Desktop and selecting the **Properties** tab, then the **Settings** tab.

You install *VIP* but there is no *VIP* button on the new *VIP* toolbar, and voice mail isn't appearing in the Inbox.	There are two possibilities for you to check.
	
	• This may be due to a firewall. To run *VIP* on a PC behind a firewall, you must either disable the firewall or open ports 59090, 59091, and 59092 for UDP traffic. (Consult your network administrator, or ask your ESI Reseller to consult *Technical Update* #205, ESI document # 0450-0698)
	
	• *Microsoft Windows* may be blocking the *VIP* add-in. Depending on your version of *Windows*, follow the appropriate instructions.
	
	If using *Windows 98, NT, 2000,* and *ME:*
	
	    1. In *Outlook*, select **Tools** and then **Options**.
	    2. Click the **Other** tab and select **Advanced Options**.
	    3. Click **COM Add-Ins**.
	    4. If *VIP* is installed, you'll see *VIP* listed as an add-in. Verify that *VIP* is checked.
	    5. Click **OK** to exit **COM Add-Ins**.
	
	If using *Windows XP*:
	
	    1. In *Outlook*, select **Help** and then **About Outlook...**
	    2. Click **Disabled Items**.
	    3. See whether *VIP* is listed. If it is, select it and click **Enable**.

You see a warning message, "A program is trying to access e-mail addresses... If this is unexpected, it may be a virus and you should choose 'No.'"	**If using a version of *VIP* earlier than version 3.12.0:** Download and install *VIP* 3.13.x or later. Also: See step 4 under "Adding contacts to the Quick Contact List," (page 22) for how to handle this warning.
During installation of *VIP*, you see an error message, "Invalid extension. Click "Retry' to re-enter. Click 'Cancel' to skip validation."	You have entered an extension that doesn't exist. Either try again with a valid extension or click **Cancel** to finish.
During installation of *VIP*, you see an error message, "Invalid password. Click "Retry' to re-enter. Click 'Cancel' to skip validation."	You have entered a password that doesn't match what the phone system has for this extension. Either try again with the valid password or click **Cancel** to finish.
During installation of *VIP*, you see an error message, "Password has not been set for this extension. Set password via phone then click 'Retry' and re-enter the password. Click 'Cancel' to skip validation. Click 'Help' for more information on how to program your password."	A password hasn't yet been entered for this extension on the phone system. Use your ESI Feature Phone to enter one (click **Help** in this error message to review the procedure), then retry the *VIP* operation.

(Continued)

Troubleshooting chart *(continued)*

Issue	Solution
During installation of *VIP*, you see an error message, "Password contains invalid text. Valid passwords consist of digits 0-9. Click 'Retry' to re-enter. Click 'Cancel' to skip validation."	The password you entered in *VIP* contains invalid characters; only digits are valid. Re-enter the password, using only digits.
During installation of *VIP*, you see an error message, "VIP is not enabled for this extension. Please contact your system administrator. Click 'Retry' to re-enter. Click 'Cancel' to skip validation."	You've entered an extension and password, but the extension isn't enabled for *VIP*. If this is the extension you intended to enter, contact your System Administrator.
During installation of *VIP*, you see an error message with the headline, "Phone System Auto Location Failed" and the text, "Unable to locate ESI phone system. Please contact your system administrator. For more information on what may be causing this problem, click 'Help.'"	The Installer software can't locate an IP address on the network for an NSP.

Repairing *VIP*

If you think *VIP* didn't install correctly, run the **Repair** option. This will look for — and replace as needed — any files that, if missing, would prevent *VIP* from working correctly. **However . . .**

Was Outlook *really closed?*

One reason *VIP* files don't install correctly is when *Outlook* fails to close completely (even though it may appear to have closed). To verify that *Outlook* really has closed, do the following, depending on which version of *Windows* you're running:

1. Display a list of running programs by using the appropriate procedure for your version of *Windows*:

- **In *Windows 98* or *ME*** — Simultaneously press **Ctrl**, **Alt**, and **Delete**. (Here, the list is called **Close Program**.)

- **In *Windows NT, 2000, XP*, or *Vista*** — Simultaneously press **Ctrl, Shift**, and **Esc**. (Here, the list is called **Windows Task Manager**.)

If *Outlook* is listed (meaning that it hasn't closed), proceed to step 2. If it doesn't appear (meaning that it has closed), skip to step 4.

2. In the list, select *Outlook* and click **End Task**.

3. To be safe, wait a few seconds and then repeat step 1 (and, if necessary, step 2). It take two or three iterations before *Outlook* really closes. (Even then, you may see a *Windows* error message asking whether you really want to do this. If so, indicate that you do and then repeat step 1 and, if necessary, step 2).

4. Proceed with repairing (or installing *VIP*).

(Continued)

To repair **VIP** *. . .*

1. Close *Outlook*.

2. Select **Settings** from the *Windows* **Start** menu.

3. Select **Control Panel** and double-click **Add or Remove Programs**.

4. Choose *VIP*.

5. Select **Repair** *VIP* and click **Finish**.

6. Click **Close** when prompted.

Uninstalling *VIP*

1. Close *Outlook* — **including** any open messages, reminders, or other *Outlook* items, even if they appear in separate windows.

2. Select **Settings** from the *Windows* **Start** menu.

3. Select **Control Panel** and double-click **Add or Remove Programs**.

4. Choose **VIP**.

5. Select **Remove VIP** and click **Finish**.

6. When prompted to confirm removal, click **Yes**.

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