

VIPTM
for Microsoft® Outlook®

Setup and User's Guide

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Rev. F



We Make It Easy To Communicate

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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.

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Introduction

Combining the advanced capabilities of your ESI phone system with the power of *Microsoft® Outlook®*, **VIP (Visually Integrated Phone)™** 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:

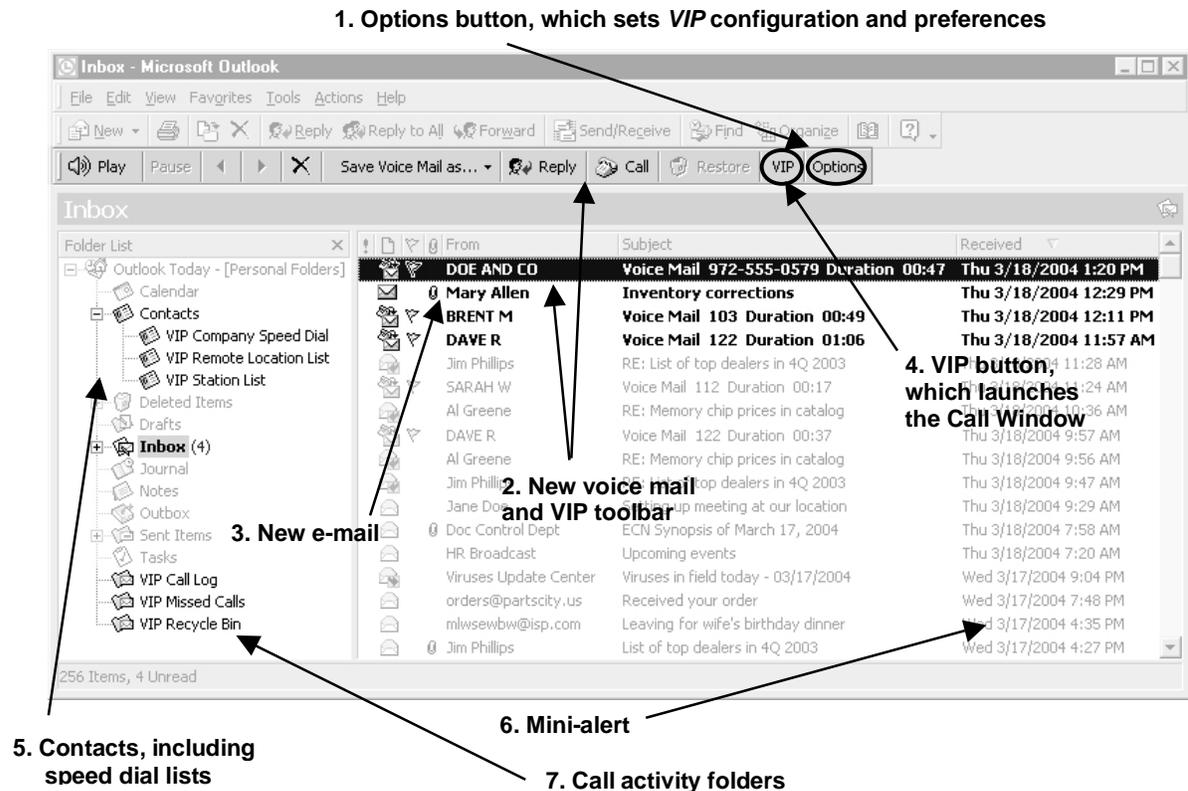
- **Manage your telephone calls** — Handle incoming and outgoing calls to your station¹, in conjunction with various ESI system features.
- **Manage your voice mail** — View your voice and e-mail messages, live call recordings, and personal memos in one *Outlook* Inbox; prioritize each message by importance; and select for playback voice mail messages, in any order. You also can restore deleted voice mail messages.
- **Manage your contacts** — Keep your contacts in a central location, including *Outlook* Contacts, Station List, Company Speed-Dial List, Remote Location List, and the *VIP* Quick Call 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.

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

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. The **Options** button on the toolbar launches a separate window where you must configure *VIP* with your station (extension) number, mailbox password, the NSP IP Address, and port number.¹ You'll be prompted to select the **Options** button when first installing *VIP*. You can also access other standard *Outlook* options, as well as customization options for the *VIP* Call Window (see page 3), 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 ID²), 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.

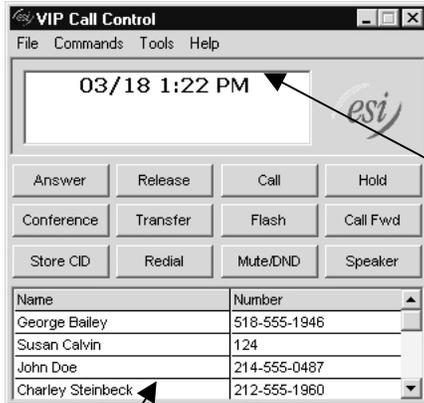
¹ For network information, contact your ESI Reseller or System Administrator.

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.

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 illustration below shows a typical Call Window feature configuration, such as after first installing *VIP* on your computer.



The **menu bar** contains the remaining call-handling features (under **Commands**) that 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 **two-line 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 12 buttons, eight of which you can remove and/or replace with other call features. The four remaining buttons (top row) are permanent and can't be removed or replaced.

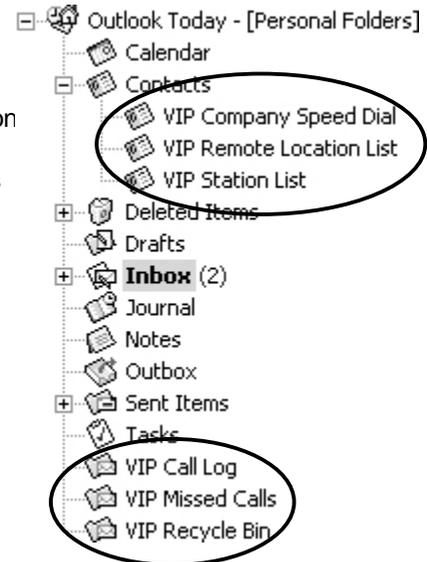
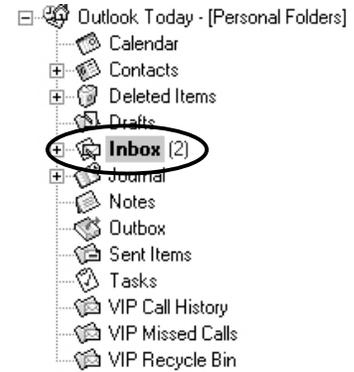
The **VIP Quick Call list** is a list of names you add by dragging-and-dropping names from your *Outlook* Contacts and speed-dial lists. Once the list is populated, you can scroll through the alphabetical *VIP* contact list, highlight the name, and double-click to place a call to that person.

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, 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.¹
- **Remote Location List** — All location numbers on the system.²
- **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.



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.

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:

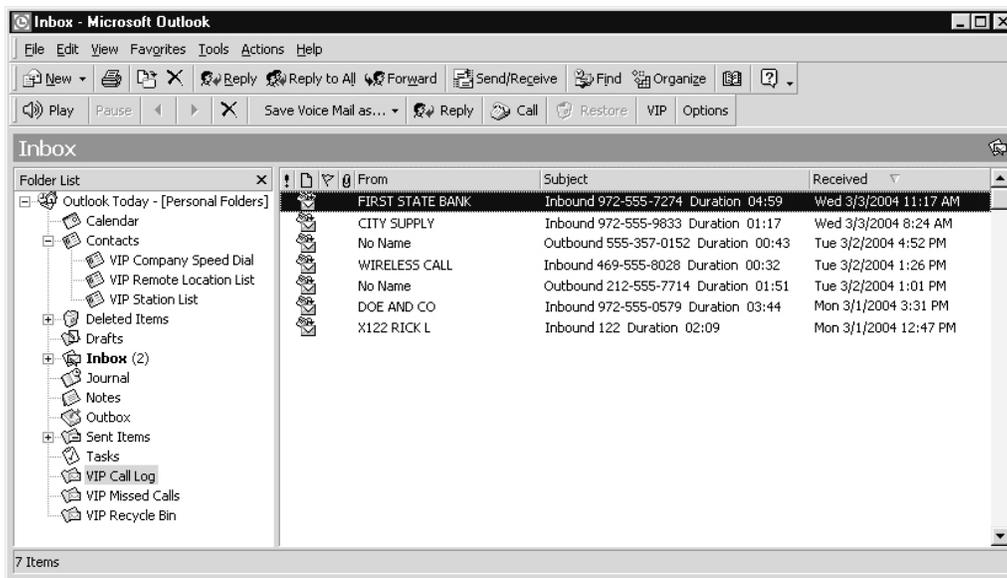
- **Incoming call** — Click the Caller ID information. This takes you to the Call Window, where you can handle the call.
- **New voice mails messages or e-mails** — Click *New E-mail* or *New Voice Mail*. This takes you to the *Outlook* Inbox, where you can view your messages.
- **Missed calls** — Click *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**, and **Recycle Bin** folders, all of which automatically populate, require no maintenance, and contain specific information:

- (a.) **Call Log** (shown *below*) contains a viewable and 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.) 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.

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.

The first time you open *Outlook* after you install *VIP*, you'll be prompted to click the **Options** button on the *VIP* toolbar to configure *VIP*. Once you've done so, click the **VIP** button on the same toolbar to launch the Call Window, so you can make or receive calls.

Let's say that a call comes in. When your phone rings, the Call Window 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 the **Missed Calls** folder.

Throughout the day, you can handle your incoming calls with the Call Window. You also can use different command buttons to place outgoing calls.

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 Window. 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 **External Message Notification** 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 four steps (explained in detail beginning below). **Failure to do so may result in VIP's not functioning properly.**

1. Observe minimum ESI hardware and computer software requirements.
2. Install the *VIP* software.
3. Configure station and network options.
4. Set up *Outlook* dialing options and properties.

Step 1: Observe minimum ESI hardware and computer software requirements

ESI hardware requirements

- One of the following ESI phone systems, **with** installed Network Services Processor (NSP)¹:
 - IVX X-Class
 - IP E-Class²
 - IVX E-Class²
 - IVX S-Class²
- ESI Digital or IP 48-Key Feature Phone (local or Remote) installed at the extension

Computer system requirements

Software

- One of the following operating systems:
 - *Windows*® 98, 2000, ME, or XP
 - *Windows NT*® 4 with Service Pack 6 (workstation only)³
- *Microsoft Outlook* 2000, 2002, or 2003.

Hardware

- Intel® Pentium® II 400 MHz processor or better
- 128 MB of RAM
- 15 MB of hard drive free space:
 - 12 MB for installed software
 - 3 MB for temporary setup files

Note: ESI neither tests whether, nor claims that, *VIP* should work alongside synchronization software for PDAs. Similarly, the only *VIP* feature that works 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.

Note: *VIP* is **not** compatible with a Citrix, *Windows Terminal Services*, or other similar environment.

¹ IVX X-Class has a built-in NSP.

² Generation II systems only.

³ If necessary, visit www.microsoft.com/networkstation.

Step 2: Install the VIP software

The ESI Reseller or System Administrator must enable your voice mailbox for *VIP*. If you aren't sure if your voice mailbox is 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

If you're installing *VIP* on *Windows NT, 2000, or XP*, you must have *Windows* Administrator log-in privileges before continuing. Consult your (phone) System Administrator if necessary.

Obtaining the VIP installer software from the Web

The *VIP* installer software is available as a free download.² Please follow these instructions **first**.

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 will appear as either "VIP" or "VIP.exe."
4. Double-click *VIP.exe* to expand the needed files, one of which— *Setup.exe* — is the *VIP* installer file.

To install VIP

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 47.)

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 CD or directory that contains the *VIP* installer file, *Setup.exe*.
4. Double-click the *VIP* Installer file. This will cause the **VIP Setup Wizard** to appear.
5. Follow the installation instructions displayed by the **VIP Setup Wizard**.
6. When the installation is complete, launch *Outlook*.
7. If this is the first time *VIP* has been installed on this PC, you will be prompted to select the **VIP** tab in the **Options** window. Proceed to "Step 3: Configure station and network options" (page 8).

To uninstall 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/Remove Programs**.
4. Choose **VIP**.
5. Select **Remove VIP** and click **Finish**.
6. When prompted to confirm removal, click **Yes**.

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*.

Step 3: Configure station and network options

This section contains configuration instructions — such as updating your extension and password settings and entering network settings. If you're installing *VIP* on your PC for the **first time**, you'll need the following information:

1. The location of the *VIP* program installer file:

2. Your extension number: _____

3. Your voice mail password: _____

4. The NSP IP address:

			.				.				.			
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5. Port number prefix:

--	--

Set voice mail delivery

The configuration window will appear if this is the first time anyone has installed *VIP* on this PC. You also can manually launch the configuration window by clicking **Options** on the *VIP* toolbar (or select **Options** from the **Tools** menu) and then selecting the **VIP** tab (see *right*).

1. Make sure that, under **Delivery Option**, **Local** is selected. Setting it to **Local** will send e-mail messages to your *Outlook* Inbox. (For information on **remote** delivery, see "Remote voice mail notification delivery," pages 32–34.) (**Default: Local.**)
2. Click **Apply** to make the other necessary setup changes — or click **OK** if you're done.

(Continued)



Set extension options

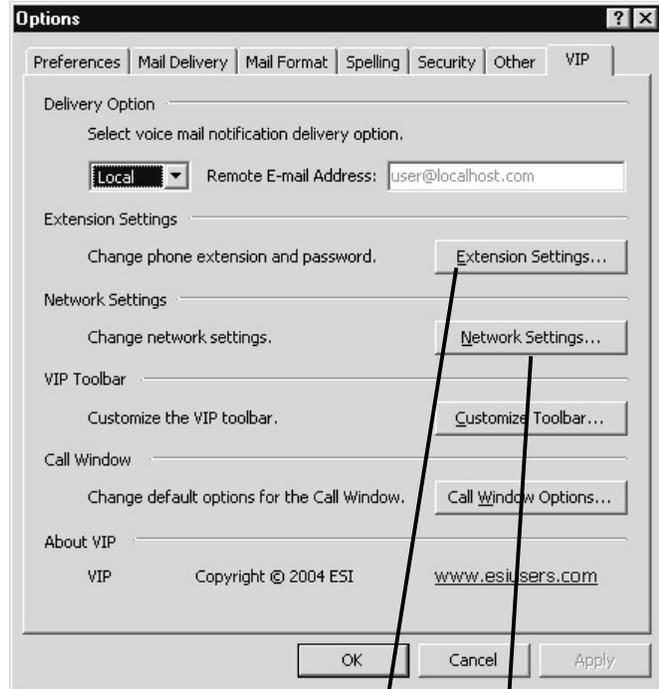
The extension and password you use for *VIP* **must** match your phone system extension and voice mail password. The configuration window should automatically appear if this is the first time installing *VIP* on this PC. You can also manually launch the configuration window by clicking **Options** on the *VIP* toolbar (or select **Options** from the **Tools** menu), then selecting the **VIP** tab.

To change your *VIP* extension and password:

1. Click **Extension Settings**. The *VIP Extension Settings* window appears.
2. Enter your extension number and current voice mailbox password in the appropriate fields. Then click **OK**.
3. When the *VIP* configuration window 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**.

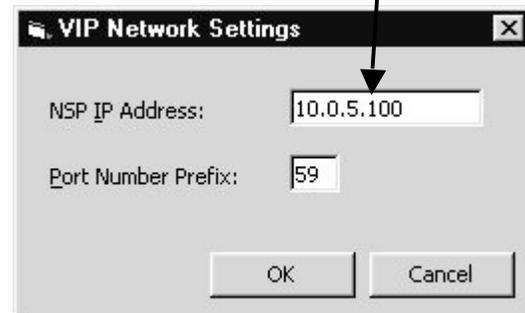
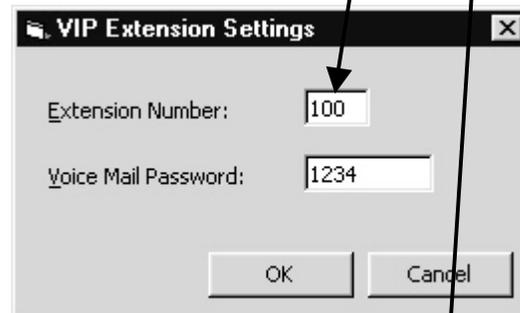


Make network settings

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

To make network settings:

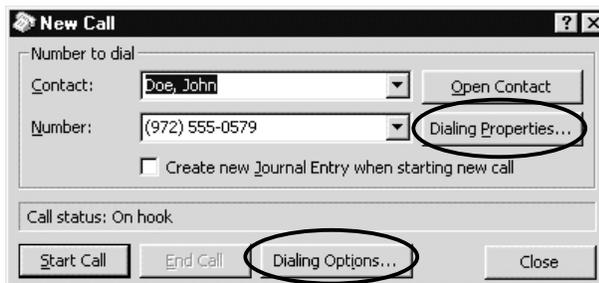
1. Click **Network Settings**. The *VIP Network Settings* window appears.
2. Enter the network information for each field. Then, click **OK**.
3. When the *VIP* configuration window appears, click **Apply** to make more changes — or click **OK** if you're done.



Step 4: 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 Call list in the Call Window).

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 11).



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**.



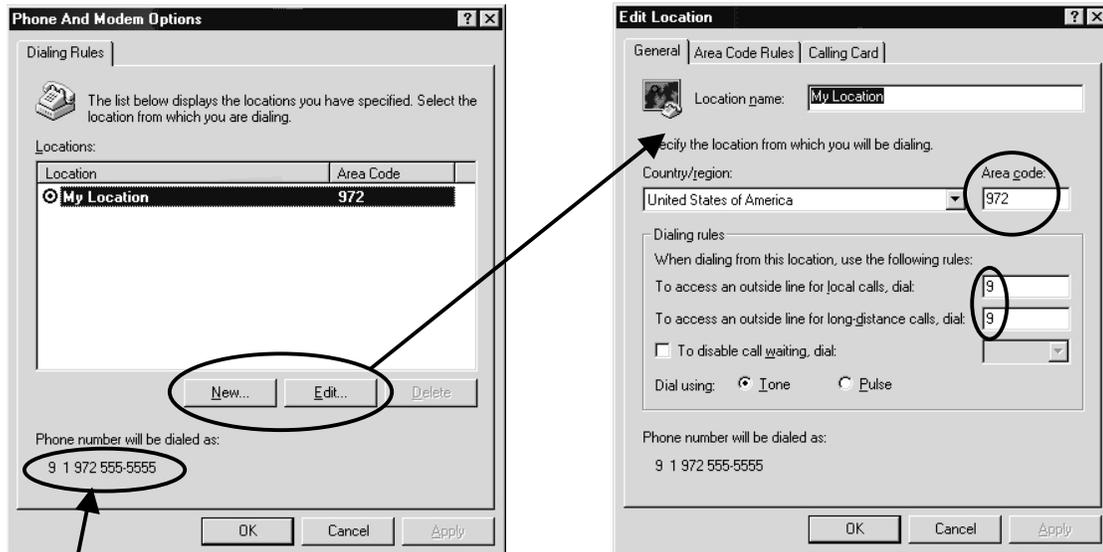
¹ In certain versions of *VIP*, the item may say **ESI VSP IP Line** or **ESI VIP Service Provider**, rather than **ESI VIP TAPI Line**.

Dialing Properties

1. In the **New Call** dialog box (see page 10), click **Dialing Properties**. The **Phone and Modem Options** dialog box will appear.

Note: *Outlook 98* and *Outlook 2000* have different views when opening **Dialing Properties**. If using *Outlook 98*, you will be taken directly to the **My Locations** tab, which is similar to the second picture (below right).

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.)

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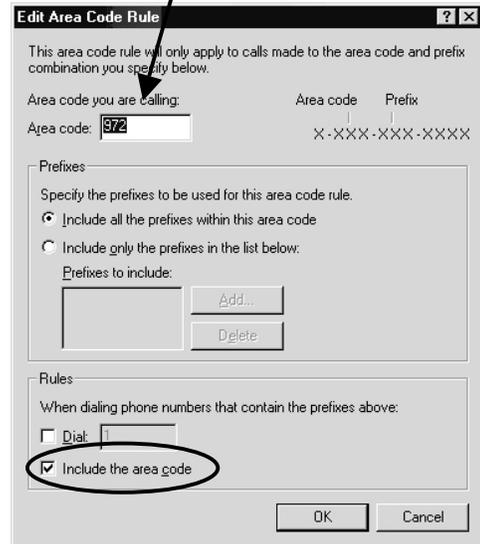
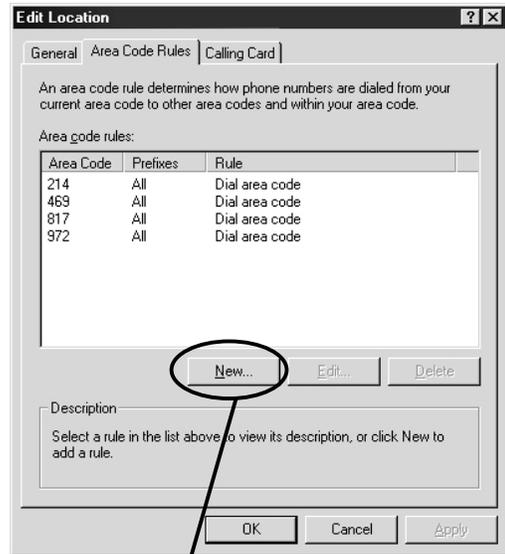
5. Now click the **Area Code Dialing Rules** tab.

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

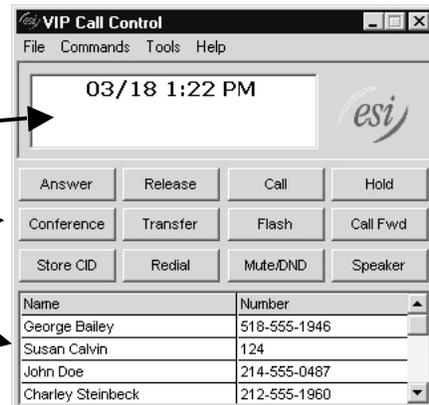
VIP Call Control window: Quick overview

The **VIP Call Control** window¹ 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:

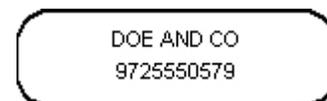
- **Menu bar** — Gives you access to all available call commands and user help.
- **Display** — A three-line call status display similar to the phone's display.
- **Call-command buttons** — Perform desired call-handling functions.
- **VIP Quick Call list** — Includes an unlimited number of contacts, listed alphabetically for easy call access.



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.
- As always, your phone still rings!



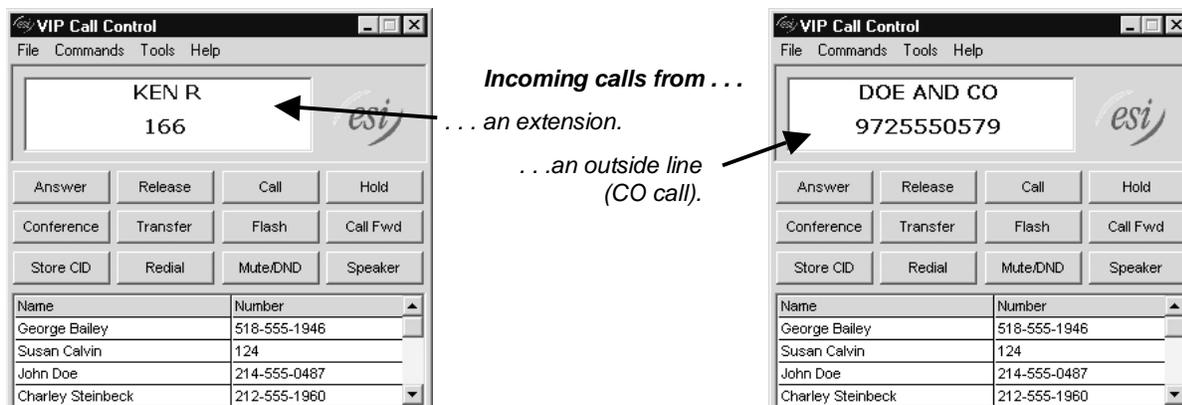
Note: You can customize these options (see "Customization," page 35).

(Continued)

¹ Often called just "Call Window" in much of this document.

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.



Placing outbound calls . . .

You can generate an outbound call in several ways. 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 number¹, 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 Window 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 Window, because *Word* is "on top." To enter the number from the Call Window, 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 Call list

To call any entry in your *VIP* Quick Call list, highlight the contact and double-click.

¹ 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 call activity records

You can use the Caller ID information in the header of a voice mail, a call log entry, 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 Window display. See "Contact management" (pages 18–25) 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**.

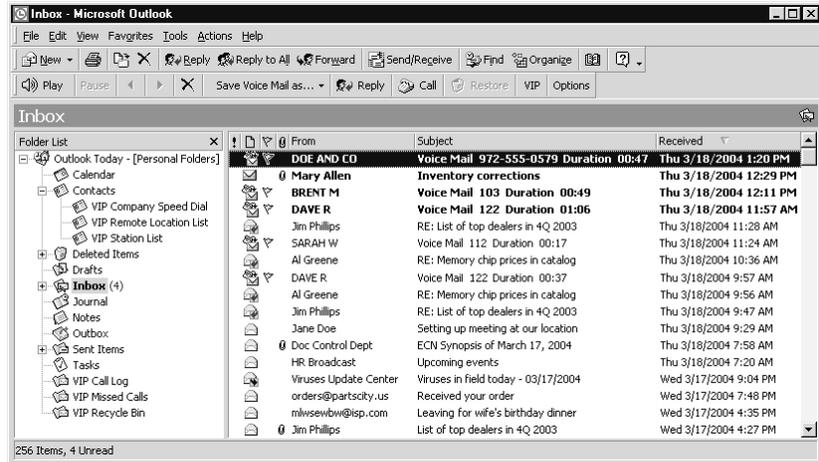
Proceed normally with the call. Once the conversation is over, click **Release** (or, in the case of a hands-free conversation, **Speaker**).

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)¹, 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 Feature Phone associated with the voice mailbox.

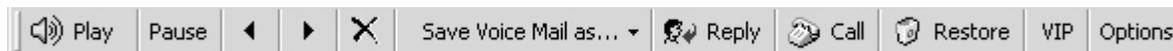


- After a message is played via *VIP*, your Feature Phone remains connected to voice mail for several seconds to allow you to manipulate the voice message from the phone. You can save, delete, or move the message from your Feature Phone or your *VIP* toolbar. If the message is neither saved nor deleted, 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 25).
- 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.

¹ If you have subscribed to Caller ID service from your telephone service provider.

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 “Customization,” page 35).



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.

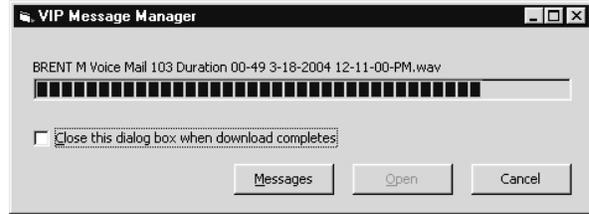
Toolbar reference guide

Button	Name	Function
	Play	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 <i>Outlook</i> Inbox.) For privacy, pick up the handset.
	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	Ends a call. Same function as hanging up. This button is available after pressing Call .
	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 <i>VIP</i> Recycle Bin folder in <i>Outlook</i> . You can restore up to the last 10 deleted messages.
	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	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	Initiates a callback to the inside or outside voice mail originator. ¹ To end the call, press End .
	Restore	Restores a deleted voice mail message as a saved (old) message. To restore a message from the <i>VIP</i> Recycle Bin, highlight the message and press Restore . The message notification moves to your Inbox with a status of <i>Saved</i> (old). The status is also reflected on your phone's display.
	VIP	Displays the <i>VIP</i> 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	Displays the <i>Outlook</i> 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

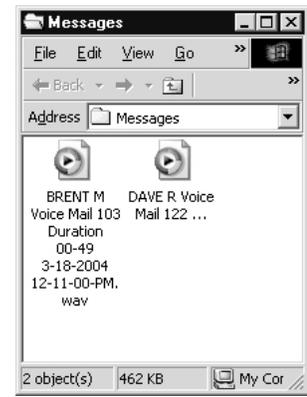
1. Highlight the desired voice mail message and click the **Save Voice Mail as...** button; then select **WAV File**.
2. A **VIP Message Manager** status box (shown, *right*) will appear to show the progress of the voice mail message being converted into a .WAV file. This is also the only opportunity 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 *Windows 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*).

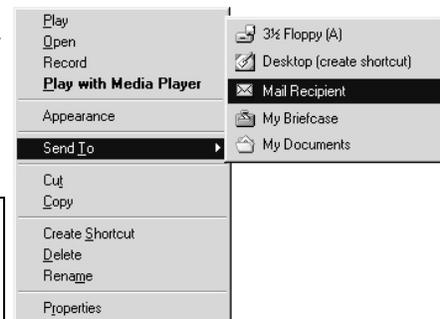
Note: The folder shown here — *c:\Program Files\VIPMessages* — is where *VIP* stores .WAV files.



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\VIPMessages* 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.

A one-minute voice mail message takes approximately three minutes to archive.

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.

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 Call list (attached to the Call Window).
- *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. 20).
- 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 Window.

While on an outside call¹ 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.

The screenshot shows the 'John Doe - Contact' window in Outlook. The window has a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with icons for Save and Close, Print, and other actions. Below the toolbar are tabs for General, Details, Activities, Certificates, and All Fields. The 'General' tab is active, showing fields for Full Name (John Doe), Job title, Company, File as (Doe, John), Address (Business), Business, Home, Business Fax, Mobile, E-mail (jdoe@doeandco.us), and Web page address. There are also checkboxes for 'Send using plain text' and 'This is the mailing address'. At the bottom, there are buttons for 'Contacts...', 'Categories...', and a 'Private' checkbox.

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 call¹ 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)

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, while calling this number puts you through to ABC Plumbing, it's not to the main number — and, therefore, 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.

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.

Adding contacts to the Quick Call list

The *VIP* Quick Call list is located in the Call Window.

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.

Note: *Outlook Contacts* and *VIP* list contacts won't automatically update each other. For example: if you edit/delete a *VIP* list contact, this won't edit/delete it in *Outlook Contacts*.

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.

Calling from the VIP Quick Call list

1. Highlight, and double-click, the desired name in the *VIP* Quick Call list. *VIP* will automatically place the extension or phone number in the display as the phone is dialing the number.
2. Proceed normally with the call.
3. Once the conversation is over, click **Release** (or, in the case of a hands-free conversation, **Speaker**).

Note: See also "Contact management," pages 18–25.

Basic call commands

You can handle a call in a variety of ways, using *VIP*'s many different call commands. Here is a description of the most basic call commands (you may also wish to consult "Advanced call commands," page 26).

Notes: The Call Window can display a total of up to 12 call command buttons. Four of the 12 buttons — **Answer**, **Release**, **Call**, and **Hold** — can't be removed; however, you can change the remaining eight command buttons to suit your own needs (see "Customization", p.35).

Since there are more commands available than can fit in the Call Window, you can see a list of available commands by clicking **Commands** on the Call Window menu bar.

Call Forward

You can temporarily "call-forward" all of your calls to another station. To use this feature from *VIP*, click **Call Fwd**; you'll be presented with a list of available extensions. Choose the desired extension (the *VIP* display will update to show the extension to which your phone is forwarded). To **turn off** call forwarding, click **Call Fwd** and choose "Call Forward off."

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**," *below*.)
- **Sending a flash hook signal** — If operating behind *Centrex*¹ 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.
- **Toggle² between calls** — If you hear a call-waiting tone while on a call, click **Flash** to toggle between the two calls.

¹ A special service your phone company may offer. See your administrator for further details.

² *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. To be reconnected, just click the name (or phone line) 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 hold 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.”

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.

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.

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.

Speaker

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.)

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 18, for details.)

Transferring calls

. . . to another station

Blind transfer

While connected to an outside call, click **Transfer** and then, in the *VIP* display, enter the extension number and click on **Call** (or press **Enter** on your PC keyboard). Hang up immediately to perform a **blind transfer**.

Note: If the called person does not answer, the caller will be forwarded either to the called person's mailbox or another destination the Installer has programmed.

Supervised transfer — announcing the caller to the called person

1. Do **not** hang up (as in "Blind transfer," above); instead, wait until the called person answers.
2. Announce the caller (e. g., "Hello; I've got Bill on the line and I'm transferring him to you now.")
3. Hang up.

Note: If the transferred-to person does not answer in step 1, click **Flash** to reconnect to the original caller.

. . . to another phone number (trunk-to-trunk transfer)

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.

Blind transfer

1. While connected to an outside call, click **Transfer** and then, in the *VIP* display, enter the phone number (including line access code — **9, 8,** or **71-76**) and click **Call** (or press **Enter** on your PC keyboard).

Note: Rather than manually entering a phone number, you can double-click a name in your *VIP* or *Outlook* Contacts lists.

2. Hang up immediately to perform a **blind transfer**. Now both outside lines are connected via a trunk-to-trunk connection.

Note: If, during the trunk-to-trunk transfer, you wish to return to the original call (e.g., perhaps you received a busy signal at the remote end, or the recipient simply won't take the call), just click **Flash**. This disconnects the second outside connection, returning you to (and removing from hold) the original call.

Supervised transfer — announcing the caller to the called person

1. While connected to an outside call, click **Transfer** and then, in the *VIP* display, enter the phone number (including line access code — **9, 8,** or **71–76**) and click **Call** (or press **Enter** on your PC keyboard).

Note: Rather than manually entering a phone number, you can double-click a name in your *VIP* or *Outlook* Contacts lists.

2. **Don't** hang up; instead, wait until the called person answers.
3. Announce the caller (e. g., "Hello; I've got Bill on the line and I'm transferring him to you now.")
4. Hang up, completing the **supervised transfer**. Now both outside lines are connected via a trunk-to-trunk connection.

Note: If, at any point during the trunk-to-trunk transfer, you wish to return to the original call (e.g., perhaps you received a busy signal at the remote end, or the recipient simply won't take the call), just click **Flash**. This disconnects the second outside connection, returning you to (and removing from hold) the original call.

... to a voice mailbox

Transferring a caller to a mailbox to leave a message

1. Click **Voice Mail**, then on **Transfer**, and finally dial the extension number **on your phone**.
2. You and the caller will be connected to that user's personal greeting. You may choose either to hang up immediately or listen to a portion of the personal greeting (*i. e.*, to assure yourself that you have placed the caller into the correct mailbox).

Note: Regardless of when you hang up, the caller will hear the entire personal greeting. To insure the privacy of the message, you will automatically be disconnected at the record tone.

Transferring a user to his/her own mailbox for message pickup

You can transfer a user who's calling from the outside directly to his/her mailbox for message pick-up by clicking **Voice Mail** and dialing the mailbox number **from the phone**, then hanging up.

... To the main greeting

To transfer an outside caller to the main greeting, click **Voice Mail** and hang up.

Voice Mail

Clicking **Voice Mail** will take you to the *Outlook* Inbox, where you can choose to play a specific message.

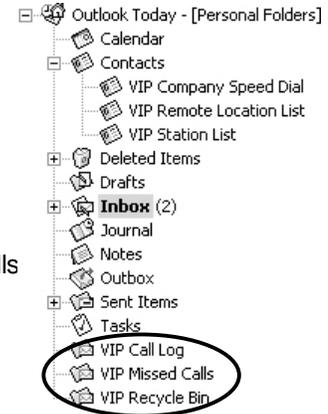
Call activity folders in Outlook

Important: Don't move or rename any of these three *VIP* call activity folders. If you do, the moved or renamed folder will no longer synchronize with the phone system.

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.
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 Call 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 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*.

Advanced call commands

Call handling features not displayed in the *VIP* Call Window are located under **Commands** on the Call Window's menu.

To replace a Call Window button with a more frequently used call handling feature, see "Customization," page 35.

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 **ACD¹ 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 though you may have been **assigned** to more than one ACD department, you can be logged into only **one** department at a time.

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 continue² 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.

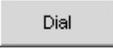
¹ Automatic call distribution.

² If necessary, consult your System Administrator for this information.

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
	Click this to add a new member to the conference.
	You can click either this button or the regular Dial/Call button after entering an extension or phone number.
	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).
	If you call a person and get either a recording or no answer, click Flash to regroup the current members.
	Groups members into the conference.
	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** either before or after placing the first call. The Call Window expands to show four displays (because four is the maximum number of conference members). If you have already placed the first call, you are in a two-way call, as it takes at least three people to make a true conference.

Tip: The first (top) display always represents you, while the second display is the first person you called.

2. To add a third member, click **Add**. The display now accepts a number when you either:
 - Directly type in the number and then click **Dial**.
 - Dial a contact from the *VIP* Quick Call list, *Outlook* Contacts, or the *VIP* speed-dial lists.
3. Once you have contacted the third member, click **Join Members** to group together all members in the conference.
4. To add a fourth member, repeat steps 2–3. If you want only three people in your conference, leave the fourth display blank.

If you attempt to reach a contact but can't connect to him/her, click **Flash**. This regroupes the remaining conference members; then click again on **Add** to dial another contact.

Tip: You can easily add a conference member to your Quick Call list by clicking **Add** and then double-clicking the contact. Then, click **Call** (or press **Enter** on your PC keyboard).

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.

Headset

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.

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 **both** of the following occur during a call to your station:

- (a.) You don't answer the call.
- (b.) The caller doesn't leave a message in your voice mailbox.

Clicking **Missed Call** will take you to the **VIP Missed Calls** folder in *Outlook*.

Overhead Page

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

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.

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.

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). You can use these keys in place of, or in conjunction with, manual activation of the greetings in user programming mode. Simply click the button designated for the personal greeting you wish to activate.

Note: Remember that personal greeting 2 is used with the “reach-me” feature, while personal greeting 3 is used with the AutoPage¹ feature.

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. Use the system's voice mail functions to hear (and otherwise control) any available recordings.

¹ AutoPage is not available on IVX S-Class.

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.

Virtual Answer 1, Virtual Answer 2

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."

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

Remote voice mail notification delivery

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.

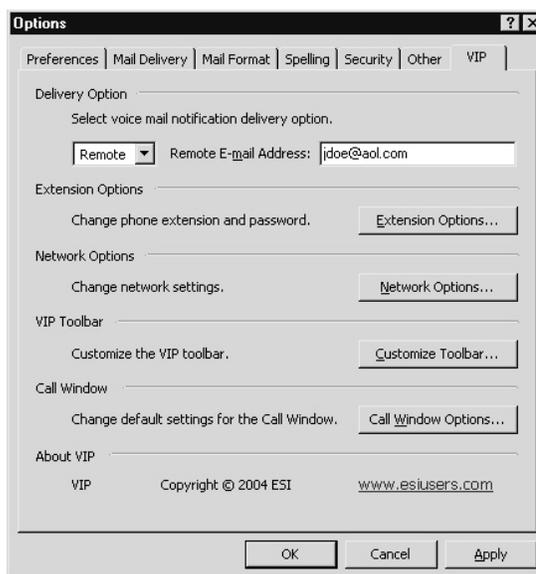
Setting the remote voice mail notification delivery option . . .

. . . 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.)



... 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

1. On your ESI phone, press **PROGRAM 6 5**.
2. Press **0**. (Phone 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
Label:	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 32).

Enabling local delivery

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 33) 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 you're at the main office or from *VIP*.

Enabling local delivery

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

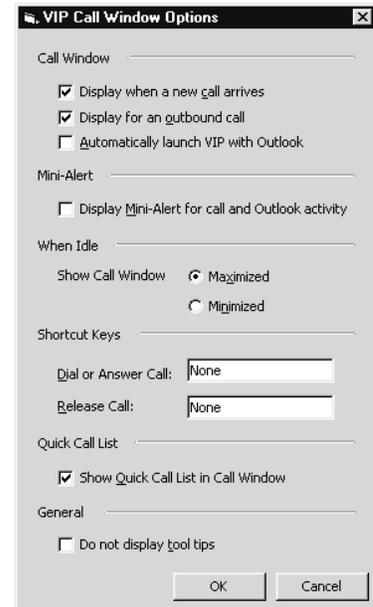
Customization

You can **customize** the different areas of the *VIP* application.

Customizing the Call Window

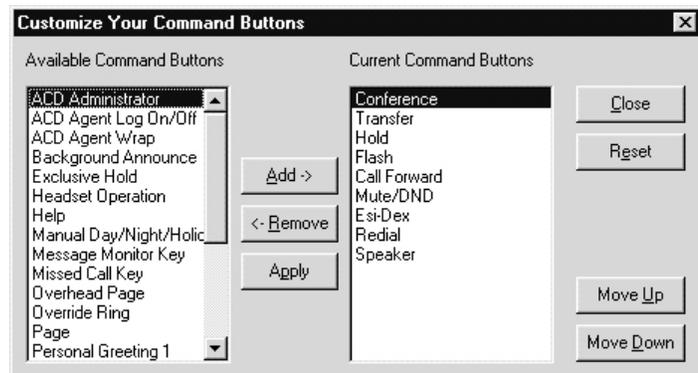
To customize the *VIP* Call Window, click **Options** on the *VIP* toolbar in *Outlook*, and then choose the **VIP** tab. This lets you make the following settings.

- **Call Window** — Three separate checkboxes allow you to control when the Call Window appears and whether *VIP* should automatically launch when you launch *Outlook*.
- **Mini-Alert** — Checking this option pops the Mini-Alert forward to notify you of incoming calls, new voice mail messages, new e-mails, and new missed calls.
- **When Idle** — Depending on your selection here, the Call Window will remain maximized or minimized, when your station is idle (*i.e.*, has no call activity).
- **Shortcut keys** — You can set a shortcut on your keyboard for answering, dialing, or releasing a call. Put your cursor in the appropriate field and press the key you want to be the shortcut. For example: if you want **F5** to be the shortcut for releasing a call, press the **F5** key on your PC keyboard while your cursor is in the Release call field (**don't type in "F 5"**).
- **Quick Call List** — If you don't want to use the *VIP* Quick Call list (thus making the Call Window smaller), uncheck this.
- **General** — Checking *Do not display tool tips* keeps small, helpful hints from appearing when you hold the cursor (mouse pointer) over specific *VIP* items. You may want to make this setting once you have used *VIP* long enough to know your way around all the features you wish to use.



Customizing the Call Window command buttons

The **Customize Buttons** choice lets you select the call command buttons you want to appear in the Call Window. (**Answer**, **Release**, **Dial** and **Hold** are permanent buttons.) You are allowed only eight more buttons in the **Call Control** window (the four permanent plus eight optional give you a total of 12). *VIP* warns you if you choose more than the maximum. (The remaining options are still available under **Commands** on the Call Window menu.)



Customizing the *VIP* toolbar

To customize the *VIP* toolbar in *Outlook*, click **Options** in *Outlook* and choose the **VIP** tab. This lets you select the buttons to appear on the *VIP* toolbar.

Station programming in VIP

Introduction

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

Accessing the User Programming window

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

Sending changes to your ESI Feature Phone

When you make changes, click **Apply** (at the bottom of the **User Programming** window) to send changes to your ESI phone. You can choose either to click **Apply** each time you make a change or make several changes at once and then click **Apply**.

Note: Clicking Apply is the only way to update your phone's programming.
--

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 **Apply**.

Help with user programming

There are two ways to get help with user programming:

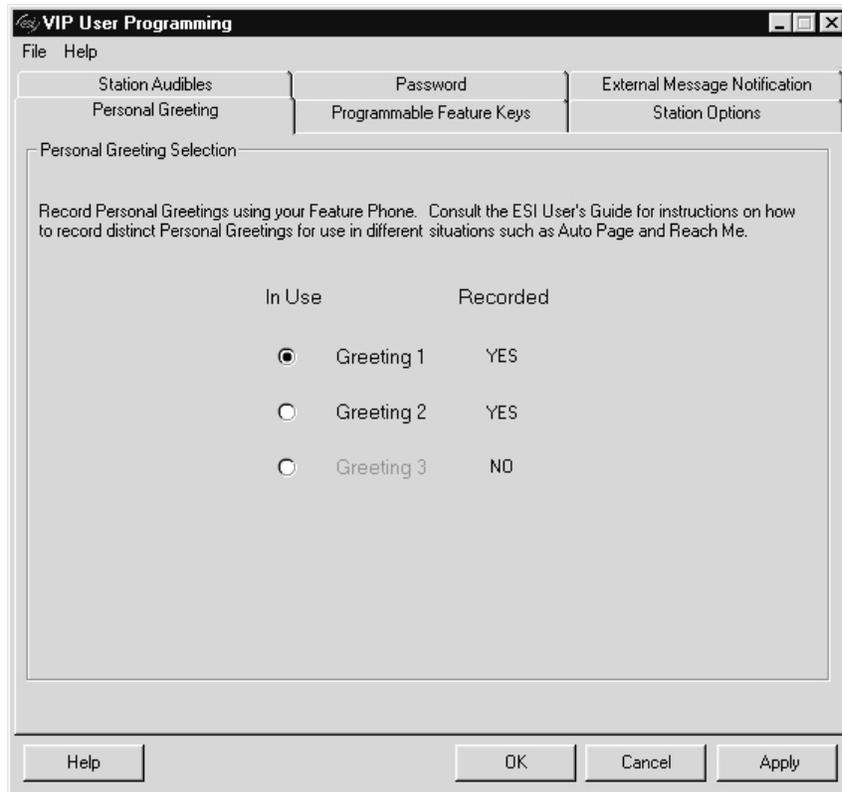
1. "Hover" the cursor over a particular word or phrase. This will pop-up a brief help text on that particular topic. To receive detailed assistance, right-click; this will take you to a Help file with a more comprehensive explanation of the topic.
2. Clicking **Help** (located in the bottom-left corner of the **User Programming** window) displays a **Help** window, wherein you can search by keywords and phrases.

Personal Greeting tab

The **Personal Greeting** tab has two items associated with each greeting:

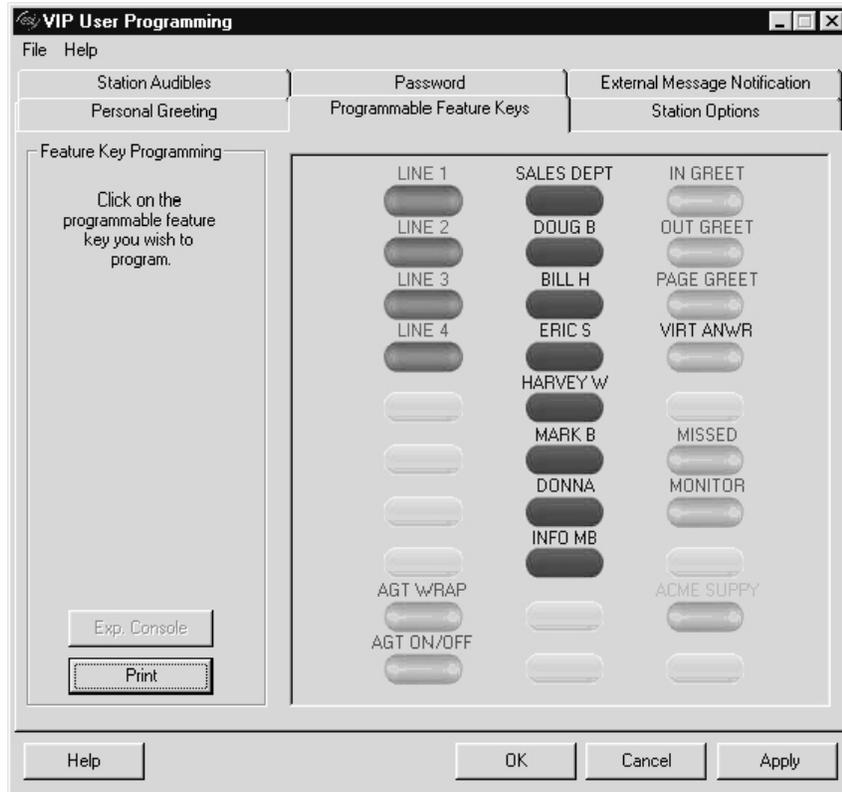
- **In Use** — Lets you select, and identifies, which one of the three possible personal greetings that callers will hear when leaving voice mail for you.
- **Recorded** — Tells you whether each greeting has been recorded.

Note: To record a greeting, you must use your phone and press **PROGRAM 1**. Once you've done so, you may use the **VIP User Programming** window to select the greeting as "In Use" (It's **not** necessary to wait until the *VIP* display shows "YES" for the greeting's **Recorded** status.)



Programmable Feature Keys tab

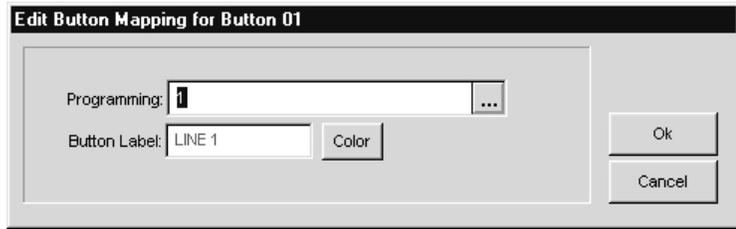
Here is a sample of what VIP might show you for the **Programmable Feature Keys** tab (your programming will look different, of course). To **program** a feature key, click that key.



(Continued)

Example: Programming a CO line key

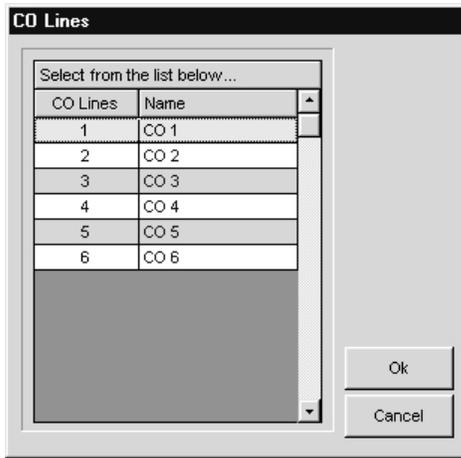
Let's say you want to program a key as a CO line¹ key. You click the key in *VIP's Programmable Feature Keys* tab, and will then see the **Edit Button Mapping** dialog box for this key ("button"):



Click the  button, and a pop-up list of key options appears (*right*):



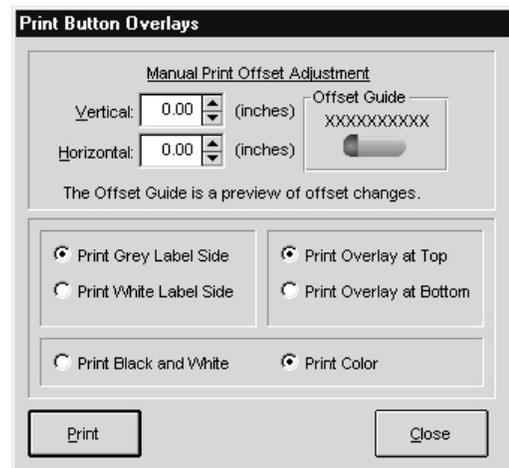
Then click **CO Line...** to continue. Now you'll see a list (*left*) of the phone system's available CO lines.



Click the desired line — in this case, CO 1 — and then click **OK**.

This takes you back to the **Edit Button Mapping** box, where you can edit the button label. You can also change the label's color by clicking **Color** in the **Edit Button Mapping** box.

If you wish, you can print an **overlay** for your phone after you've programmed all the keys to your liking. At *VIP's Programmable Feature Keys* tab, click **Print** to view the **Print Button Overlays** dialog box (*right*). This lets you make any necessary adjustments so your printer can print the key labels correctly on the overlay. You may wish to experiment with various settings to get it just the way you want it.



¹ Outside line. CO means "Central Office."

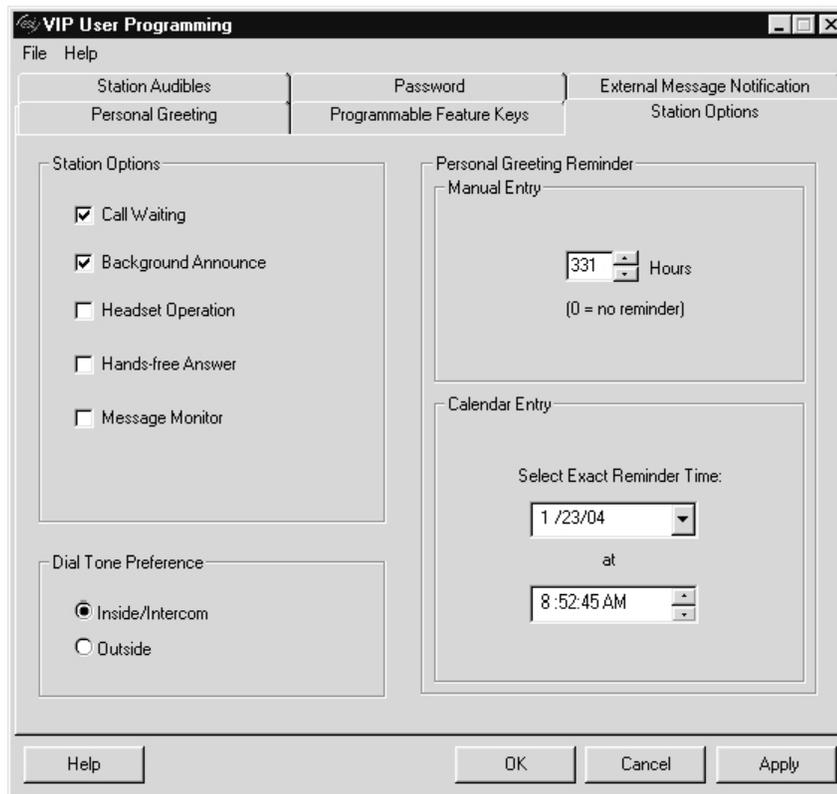
Station Options tab

The **Station Options** tab offers several choices.

Station Options box

In the **Station Options** box, you can enable or disable any of the five choices. Here's a brief description of each.

- **Call Waiting** — If call waiting is enabled on your station (**PROGRAM 3 1** on your phone) and a second call comes in while you're already on another call, you'll hear a tone in the earpiece and the bottom line of your display will indicate that a second call is waiting. You can ignore the call waiting indication and, after a brief time, the system will transfer the call to your voice mailbox¹. To **toggle between** the two calls, click *VIP's Flash* button. To **drop** either call, click **Release** while connected to the call you want to drop; this disconnects the call and automatically reconnects you to the other call.
- **Background Announce** — Enabling this feature lets you receive a brief, private **background announcement** to the station's earpiece.
- **Hands-free Operation** — You can program your phone either to enable or disable hands-free answer. With hands-free **enabled**, an internal call to your station generates a short ring and a double connect tone, then automatically connects the caller to your speakerphone. With hands-free **disabled**, an internal call to your station generates a single-ring cadence, while outside-line calls ring with a double-ring cadence.
- **Message Monitor** — This feature, also known as *live call screening*, lets you hear a caller leaving a message in your voice mailbox, just as occurs on your home answering machine. While you hear the caller on your speaker, you have the following options:
 - Lift the handset to intercept the call.
 - Do nothing, whereupon the system records the message to your voice mailbox for later retrieval.
 - Click **Mute/DND**; this temporarily mutes your speaker (although the system continues to record the message to your voice mailbox).



¹ Or other destination set by the Installer.

Dial Tone Preference box

If you make mostly outside calls, you may find the **Dial Tone Preference** setting helpful. It 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 click **Speaker**, you'll automatically receive an outside dial tone from the highest-numbered line available to you.

Personal Greeting Reminder box

If you frequently change your personal greeting, use this option; it sets your station to remind you of your current greeting.

You can set your reminder in either of two ways:

- **Manual Entry** — Enter the number of hours between reminders.
Range: 0 (no reminder) to 500.
- **Calendar Entry** — Set a specific date and time when the next reminder should occur.

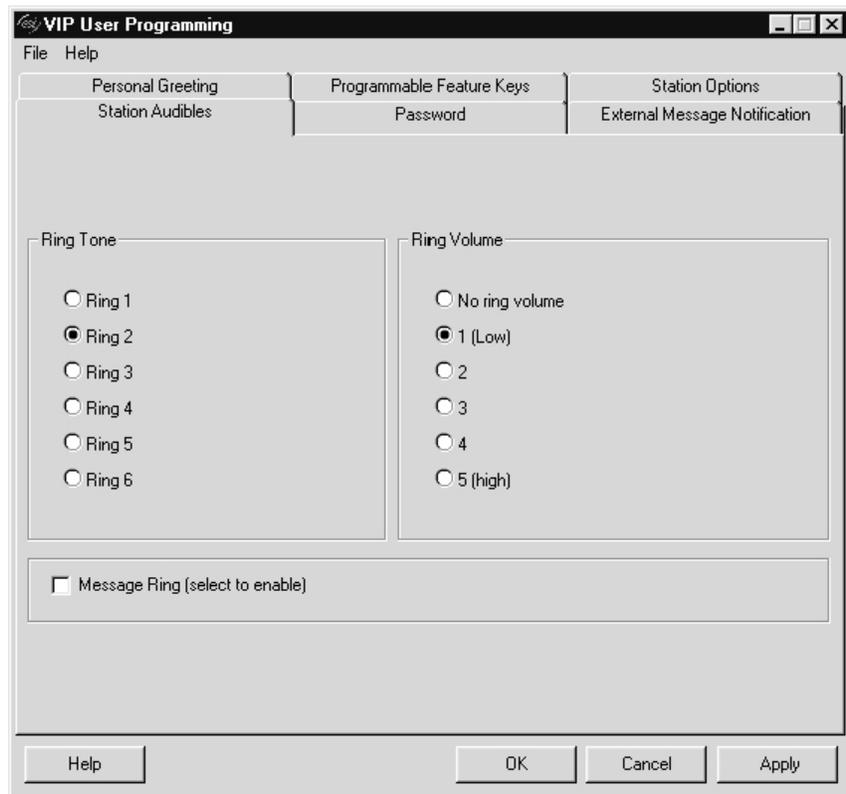
The first time you use your phone after it's been idle for the amount of time set in this option, the system automatically plays your current greeting and gives you the option of changing it.

Note: The **Manual Entry** and **Calendar Entry** fields operate independently of each other and, therefore, won't match. For example: if you enter **24** in the **Manual Entry** field, the **Calendar Field** won't automatically show the date and time 24 hours from now.

Station Audibles tab

VIP's **Station Audibles** tab controls three audible items for your station. As you make settings to the first two, you'll hear the new settings on your phone's speaker.

- **Ring tone** — The **Ring Tone** box lets you choose from among six possible tones to help distinguish your phone's ring from that of other nearby phones.
- **Ring volume** — The **Ring Volume** box lets you set the desired ringer volume.
- **Message ring** — The **Message Ring** checkbox lets you enable or disable a feature that, when you have any new voice mail messages waiting, will periodically generate a short ring tone at your station's phone.



Password tab

Your **password** may consist of two to eight digits (but *0* can't be the first digit). Entering **only 0** as the password turns off the password requirement. There are four items in *VIP*'s **Password** tab:

1. **Current Password** — Displays the password currently in use.
2. **Enter New Password** — Lets you enter a desired new password. After doing so, you'll need to confirm the entry (see next item).
3. **Confirm New Password** — This is where you re-type the new password, to confirm the entry (if this entry isn't the same as under **Enter New Password**, *VIP* will reject the new password entry attempt).
4. **Password Level** — Select the password level for your station:
 - No password required (*i.e.*, no password entry needed for **any** voice mail retrieval).
 - Password required only for **remote** access to voice mails.
 - Password required for access to **all** voice mails (even from your ESI phone).

Note: After you click **Apply**, you **don't** have to enter the new password in the *VIP* configuration (under **Options** on the *VIP* toolbar).

The screenshot shows the 'VIP User Programming' window with the 'Password' tab selected. The window has a menu bar with 'File' and 'Help'. Below the menu bar are three tabs: 'Personal Greeting', 'Programmable Feature Keys', and 'Station Options'. The 'Station Options' tab is active, and within it, the 'Password' sub-tab is selected. The main area is titled 'Voicemail Password Entry' and contains the following fields and options:

- Current Password:** A text box containing '1234'.
- Enter New Password:** An empty text box.
- Confirm New Password:** An empty text box.
- Password Level:** A group of three radio buttons:
 - No Password Required
 - Password required only for remote access to voicemails
 - Password required for access to all voicemails

At the bottom of the window are four buttons: 'Help', 'OK', 'Cancel', and 'Apply'.

External Message Notification tab

After a caller has been forwarded to your voice mailbox and is listening to your personal greeting, this feature lets the caller be forwarded to a number outside the system — *i.e.*, a regular phone number rather than an extension. When the caller presses **4** during your greeting, the system forwards him/her to the number set for “phone delivery” under **external message notification**. If that number doesn't answer, the caller is returned to your voice mailbox. When you receive a forwarded call, you'll be prompted to “press any key” to accept the call. **You must have personal greeting 2 selected and it must tell callers to press 4 for this feature.**

Setting up external message notification

1. Use the **Delivery Methods** box to select a delivery method.
2. In the **Message Types** box, select which type of message will initiate a notification.
3. Enter (or select from the pull-down list on this tab), as desired, a number for each of the following¹ which the system will call when it makes a notification:
 - An off-premises phone.
 - A pager.

Important: If the delivery method you chose in step 1 includes both a phone number and pager number, you must enter both numbers or *VIP* will not accept your selection.

4. Select the **Personal Greeting** tab and click **Greeting 2**. If it hasn't been recorded, press **PROGRAM 1** on your phone and follow the prompts to record personal greeting 2.

Important: In personal greeting 2, you **must** tell the caller to press **4**, which will activate notification.

¹ It's not necessary to add 9 [or 8 or 71–76] to get an outside line; the system assumes this is an outside call and will add the outside line group access code automatically.

Troubleshooting

Troubleshooting chart

Issue	Solution
You see an error message, "Timed out trying to configure TAPI line..."	Verify that: <ul style="list-style-type: none"> • 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 <i>VIP Extension Options</i>. • Your Station Administrator has given your station access to use <i>VIP</i>. • The NSP IP address and port number that your installing ESI Reseller entered in the ESI phone system matches the one entered in <i>VIP Network Options</i>.
Notification messages do not appear in the <i>Outlook</i> Inbox.	Verify the password on your phone (PROGRAM then 51) matches the password and extension set in <i>VIP</i> (see page 9)
	Verify that the appropriate delivery option is set (see "See voice mail delivery," page 8).
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.
<i>VIP</i> toolbar is missing	Verify that only one instance of <i>Outlook</i> is running (if necessary, check the <i>Windows</i> taskbar). <i>VIP</i> will run in only the first instance of <i>Outlook</i> .
	Check to see if the <i>VIP</i> toolbar is "floating."
	Right-click the <i>Outlook</i> 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 <i>Outlook</i> first opens (it's normal for <i>Outlook</i> and <i>VIP</i> to take a few seconds to synchronize). If this occurs, wait a few seconds and try again.
<i>VIP</i> call activity folders fail to work properly.	Make sure you didn't rename or move any <i>VIP</i> 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 <i>VIP</i> software; see "Repairing <i>VIP</i> ," page 47.)
Notification messages appear in the <i>Outlook</i> Inbox after they are moved to another folder.	<i>VIP</i> doesn't support <i>Outlook</i> Inbox "rules" that manipulate the message (e.g., move or delete it). If a <i>VIP</i> message is moved to another folder, either manually by the user or by <i>Outlook</i> rules, the system will restore the message to the <i>Outlook</i> Inbox during the next refresh cycle.

(Continued)

Troubleshooting chart (continued)

Issue	Solution
There are two <i>VIP</i> toolbars.	Right-click the <i>Outlook</i> toolbar and unselect Hotbar .
You cannot dial a Contact from either <i>Outlook</i> or the <i>VIP</i> Quick Call list.	Verify that <i>Outlook</i> dialing rules are set and that ESI VIP TAPI Line ¹ was selected under <i>Outlook</i> Dialing Options (see page 10).
You see an error message, "Timed out trying to Connect to ESI NSP at ..."	Verify that the correct information is entered under VIP Network Options (see "Set network options," page 9). 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>i.e.</i> , 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..."	<p>This tends to occur during use of <i>Outlook 2003</i> in <i>Windows XP</i>. Remediating this involves using the <i>Windows Registry Editor</i>. Follow these instructions exactly as shown [especially step 4]:</p> <ol style="list-style-type: none"> 1. Click the <i>Windows</i> 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 <i>Registry Editor</i>. 3. Go to <code>HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Rpc\ClientProtocols</code> and view the keys on the right. 4. If they're not present, add the following keys: <code>"ncacn_np" = "rpcrt4.dll"</code> <code>"ncacn_tcp" = "rpcrt4.dll"</code> <code>"ncadg_ip_vdp" = "rpcrt4.dll"</code> <code>"ncacn_http" = "rpcrt4.dll"</code> 5. Save your changes (if you make any) and then close <i>Windows Registry Editor</i>.
<p>You receive a runtime error when launching <i>VIP</i> applications (<i>e.g.</i>, the Call Window or user programming).</p> <p>or</p> <p>Dragging an <i>Outlook</i> contact to the Quick Call list either has no effect or causes the Call Window to crash.</p> <p>or</p> <p>You receive an error message about the "MDAC file."</p>	<ol style="list-style-type: none"> 1. Close <i>Outlook</i>. 2. Go to www.microsoft.com/data and download Version 2.5 (or higher) of the MDAC (Microsoft Data Access Cio² file. Follow the installation instructions on the Web page from which you download the MDAC file. 3. Reopen <i>Outlook</i>.

(Continued)

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
<p>The <i>VIP</i> Call Window doesn't display correctly — borders are missing, buttons are misproportioned, <i>etc.</i></p>	<p>Adjust your PC's display properties by right-clicking the <i>Windows</i> Desktop and selecting the Properties tab, then the Settings tab.</p>
<p>You install <i>VIP</i> but there is no <i>VIP</i> button on the new <i>VIP</i> toolbar, and voice mail isn't appearing in the Inbox.</p>	<p>There are two possibilities for you to check.</p> <ul style="list-style-type: none"> • This may be due to a firewall. To run <i>VIP</i> 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.) • <i>Microsoft Windows</i> may be blocking the <i>VIP</i> add-in. Depending on your version of <i>Windows</i>, follow the appropriate instructions. <p>If using <i>Windows 98, NT, 2000, and ME</i>:</p> <ol style="list-style-type: none"> 1. In <i>Outlook</i>, select Tools and then Options. 2. Click the Other tab and select Advanced Options. 3. Click COM Add-Ins. 4. If <i>VIP</i> is installed, you'll see <i>VIP</i> listed as an add-in. Verify that <i>VIP</i> is checked. 5. Click OK to exit COM Add-Ins. <p>If using <i>Windows XP</i>:</p> <ol style="list-style-type: none"> 1. In <i>Outlook</i>, select Help and then About Outlook... 2. Click Disabled Items. 3. See whether <i>VIP</i> is listed. If it is, select it and click Enable.
<p>You see an error message, "A program is trying to access e-mail addresses... If this is unexpected, it may be a virus and you should choose 'No.'"</p>	<p>This is a security warning that appears when earlier versions of <i>VIP</i> interact with certain versions of <i>Outlook</i>. Download and install <i>VIP</i> 3.3.0 or higher.</p>

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, or XP*** — 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 takes 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*).

To repair VIP . . .

1. Close *Outlook*.
2. Select **Settings** from the *Windows Start* menu.
3. Select **Control Panel** and double-click **Add/Remove Programs**.
4. Choose **VIP**.
5. Select **Repair VIP** and click **Finish**.
6. Click **Close** when prompted.

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NOTES



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