VoiceWorks 16 Installer

Software for *Windows*® *95/98*

About ESI

ESI (Estech Systems, Inc.) is a privately held corporation based in Plano, Texas, in the internationally known "Telecom Corridor." Founded in 1987, ESI designs and builds innovative telecommunications products for businesses like yours. Because of their powerful combination of value and features, ESI products are consistently recognized by industry publications and leaders.

Visit ESI on the Web at **http://www.esi-estech.com**.

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General overview

VoiceWorks 16 Installer is a Windows® 95/98-based application that provides the installer the means to program the VoiceWorks 16 either on-line, via the serial port or modem, or off-line. *Installer* provides the capability of programming nearly every function in the system's operation, except for re-initialization and prompt recording, which must be done through a telephone set.

Additional functionality includes back-up and restore, of the system program configuration, either on-site or remotely. Back-ups may be stored on either the PC's hard drive or a 3.5″ floppy disk. Read this guide carefully before attempting these procedures, as there are special notes of which you must be aware.

Included with this application are .PDF (Adobe Acrobat) files of all pertinent documents — the *Installation Manual*, *Administrator Manual*, *User's Guide* and *User's Pocket Guide*. These documents require that Adobe® *Acrobat® Reader* be installed on the computer with the Installer, which uses *Acrobat Reader* to let you view and print them.

Important: Please note that *Acrobat Reader* is not included in this software package. As of this writing, *Acrobat Reader* is available as a free download on the Internet. The Adobe Web site is **www.adobe.com.**

Important: The first time you run *Installer,* the program will prompt you to "Specify the directory containing AcroRd32.exe." *AcroRd32.exe* is the actual name of the *Acrobat Reader* program. Typically, the directory will be named something like "C:\Acrobat3" but, obviously, this will depend on the settings you used to install *Acrobat Reader.*

Because you already have the documents that actually teach you how to program VoiceWorks 16 itself, we will not attempt in this manual to teach that. Instead, we merely will provide a summary of how the *software* works and pass along a few cautionary tips here and there. **The best and fastest way to learn the software is to use it, so long as you know how to program VoiceWorks 16.**

System requirements

To install and run *VoiceWorks 16 Installer,* you need an IBM®-compatible PC with:

- A 486SX/66 MHz (or higher) processor.
- Microsoft® Windows 95 or 98 operating system.
- 16 MB of RAM if using Windows 95, 24 MB if using Windows 98 (however, additional RAM significantly improves performance)
- A minimum of 30 MB of available hard disk space.
- A 3.5″ 1.44 MB floppy drive.
- VGA (or better) monitor; supported resolution settings include 640 × 480 to 1024 × 768 (although we recommend 800 × 600 for best appearance).
- Pointing device, such as a mouse.
- **Available** RS-232C serial port (for on-site programming).
- Modem (for remote programming).

Installation

To install *VoiceWorks 16 Installer* using *Windows 95/98*:

1. Turn on your PC and wait until *Windows 95/98* has finished loading.
2. Close any applications that may be running.
3. Insert the CD-ROM into the PC. Give the CD-ROM drive approximately 10 seconds to "spin up" and read the CD-ROM.
4. Open *Windows Explorer* and double-click on the CD-ROM drive icon. The CD-ROM's contents will appear.
5. Double-click on **Setup** (it may appear as **Setup.exe**, depending on your *Windows* settings) in the CD-ROM contents window.
6. Follow the instructions as they appear on the screen. **We recommend that you use the defaults, unless you are sure that they will be inappropriate for your computer.**

Running the software

To run VoiceWorks 16 *Installer:*

1. Close any applications that may be running.
2. Click on the **Start** button on the *Windows 95/98* taskbar.
3. Click on **Programs.**
4. Point to the *program group* which contains *VoiceWorks 16 Installer* (unless you specified otherwise during the setup, the program group will be **ESI**).
5. Click on **VW16 Installer.**

Important: The first time you run *Installer,* the program will prompt you to "Specify the directory containing AcroRd32.exe." *AcroRd32.exe* is the actual name of the *Acrobat Reader* program. Typically, the directory will be named something like "C:\Acrobat3" but, obviously, this will depend on the settings you used to install *Acrobat Reader.*

Important: You'll notice that the *Windows 95/98* taskbar disappears when you run Installer. This is because we've designed Installer to use the maximum screen height, thus allowing you to see more information at a time.
If you wish to switch back and forth between/among *Installer* and other Windows applications, use the standard **Alt-Tab** keystroke to do so. (When you switch to an application other than *Installer,* the Windows taskbar will probably reappear; it depends on the individual application.)

As an alternative, you may also click on the "minimize" icon ( ) in the upper right corner of the *Installer* screen, allowing you to see your normal Windows desktop.
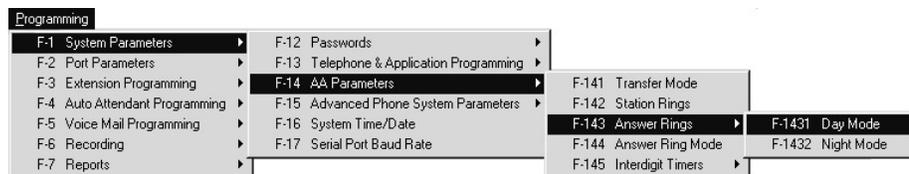

VoiceWorks 16 Installer conventions

Function numbers

This installation package follows the same basic convention as DTMF programming. (Consult your VoiceWorks 16 documentation if necessary.) Each programming variable is designated by a *function number.* Function numbers are grouped according to the operation(s) each performs. For example, all programming in **F-1**[1] involves interfacing VoiceWorks 16 to the telephone system, while all mailbox programming is grouped under **F-5.** Functions are then divided further into sub-functions by lengthening the function number — *e.g.,* F-51. To reach the primary functions, use the **navigation buttons** at the **bottom** of the screen; to reach sub-functions, use the **Programming menu**. (See below.)

F-1	F-2	F-3	F-4	F-5	F-6	F-7

Left: Navigation buttons for primary functions

Programming
F-1 System Parameters ▶	F-12 Passwords ▶	
F-2 Port Parameters ▶	F-13 Telephone & Application Programming ▶	
F-3 Extension Programming ▶	F-14 AA Parameters ▶	F-141 Transfer Mode
F-4 Auto Attendant Programming ▶	F-15 Advanced Phone System Parameters ▶	F-142 Station Rings
F-5 Voice Mail Programming ▶	F-16 System Time/Date ▶	F-143 Answer Rings ▶ — F-1431 Day Mode
F-6 Recording ▶	F-17 Serial Port Baud Rate ▶	F-144 Answer Ring Mode — F-1432 Night Mode
F-7 Reports ▶		F-145 Interdigit Timers ▶

Above: Programming menu for sub-functions (example shown)

Special buttons

For brevity's sake, we'll cover only those controls which are unique in some way to *VoiceWorks 16 Installer*. Other controls work just like they do in other *Windows 95/98* programs. If necessary, consult your *Windows 95/98* documentation.

- **Navigation** — See "Function Numbers" *(above)*.

- **Programming** and **Maintenance** — Each selects the mode you're in. As a safety feature, when you are programming, you may not perform maintenance (see "Maintenance menu," page 6); and vice versa.

  | Programming | Maintenance |

- **Apply** — Immediately implements a setting you've made. Appears only when you're *on-line* (see "Opening a site," page 7).
- **OK** — Works the same as **Apply** (above), but also will "back up" one function code level — *e.g.,* from *15* back to *1*.

  | Apply | OK | Cancel | Help |

- **Cancel** — Cancels any current operation without changing settings. Appears only when you're *on-line* (see "Opening a site," page 7).
- **Help** — Assists you with the **specific** *head function* (1–7) you're presently using.[2]

- **Pop-up** (⎕) — Brings up a *dialog box* in which you can make more detailed settings.

Data-entry fields

Some settings require textual entries; some require only that you click on a checkbox (☐) or perhaps a *radio button* (⊙).

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[1] The on-screen "F" buttons **do not** correspond to your PC's "F-keys"; similarly, your PC's "F-keys" **do not** trigger these buttons.
[2] For more generalized help, use the Help menu (see page 6).

Introduction to using the software

The main screen

After *Installer* starts, it will present *the main screen.* From here, you may open an existing site, create a new site or manage your site information. It is only when a site is open that you can directly access function numbers. You may also print or view the *Installation Manual, Administrator Manual, User's Guide* and *User's Pocket Guide.* (As mentioned on page 1, you will have to install *Adobe Acrobat Reader,* not provided in this software package, to view or print manuals.) Reports can be viewed on-line. Additionally, backing up the system configuration and restoring a configuration is accessed from the Windows menu bar at the top of the screen. The following menus are available on the Windows menu bar:

- **File**
- **Programming** (usable only when a site is open)
- **Documentation**
- **Reports** (usable only when on-line)
- **Maintenance** (usable only when on-line)
- **Help**

File menu

Open Site
Displays a complete list of sites currently available on the hard drive. Simply highlight a site and select **OK**. Editing the site information is not available here (see "**Site List**," page 5). For more information, see page 7.
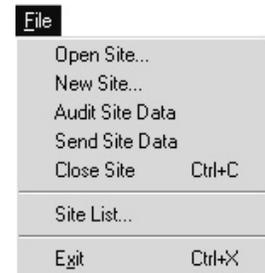
New Site
Displays a window in which you enter the basic information. The only **required** information is a site name. While the description is optional, we recommend entering the site telephone number at this time; however, you may also add or change it later. For more information, see page 7.

Audit Site Data
Analyzes the site database for certain common programming errors. The report will appear on screen and can be printed.
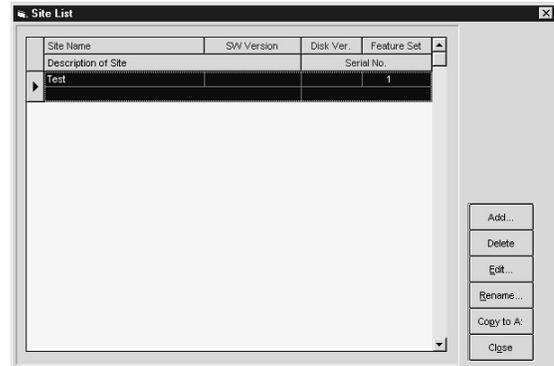
Send Site Data
Allows you to initially program a site off-line and then, when connected on-line later, send the programmed data. *Installer* will automatically perform a site audit before sending the database, and warn you of common errors.

Site List

Displays a complete list of existing sites. Information displayed there includes site name, description, software version, disk version, VoiceWorks 16 unit serial number and site telephone number.[3] **Site List** lets you:

- Enter a new site.
- Delete permanently a site and its database.
- Edit the site database name, description, feature set and telephone number.
- Rename a site database.
- Copy the site's database to a floppy diskette.

Programming menu

This lets you access a specific sub-function without having to progress first through the sub-function's head function; *e.g.,* you can go straight to Function 1432 without first having to go through Function 1, then Function 14 and then Function 143 (see the second graphic on page 3).

This menu will become much more useful as you become more familiar with VoiceWorks 16 programming, because it will save you valuable time in gaining access to sub-functions you already know.
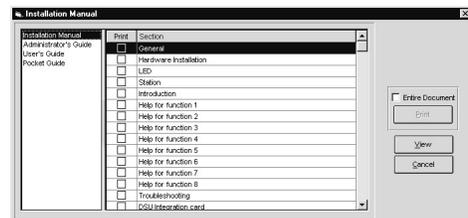
Documentation menu

All end-user, Administrator and Installer documentation can be viewed and printed from this menu. When you select a document, a window *(lower right)* shows you available sections, if any, to view (in *Acrobat Reader,* which will launch automatically when you choose to view a document) or print. While this window is on-screen, you may also view or print another document by highlighting its name in the window's left side. Here are some tips:

- The *Installation Manual* and *User's Guide* are each displayed as a list of sections. Check the box next to the section(s) of the document you wish to print, then click on **Print**. To print the **entire** selected document[4], check **Entire Document,** then click on **Print**.
- *Acrobat Reader* lets you view, on-screen, one section at a time. Highlight the desired section and click on **View**.

Important: Before printing, make sure *Acrobat Reader* **isn't** running.[5] You may wish to click on the "minimize" icon (▬) in the upper right corner of the *Installer* screen, to make it easier to confirm that you've closed *Acrobat Reader.*

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[3] The software version, disk version and VoiceWorks 16 serial number are set automatically when the site is connected on-line.
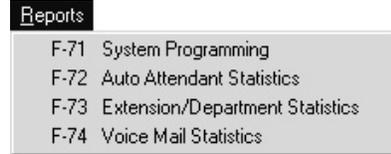
[4] This is your only choice for printing the *Administrator's Guide* and the *Pocket Guide;* neither is sectioned.

[5] While the printing function does **use** *Acrobat Reader,* the particular way that *Windows 95/98* controls the process requires that *Acrobat Reader* **not** be **running** when you try to print from within *VoiceWorks 16 Installer*.

Reports menu

Four reports are accessible:

- System Programming
- Auto Attendant Statistics
- Extension/Department Statistics
- Voice Mail Statistics

The Reports menu is usable **only** when connected on-line, either remote (modem) or local (serial), to a VoiceWorks 16.

1. Select the desired report and a window will pop up, highlighting the report you selected.

   Note: You can clear the totals for any report (**except** the System Programming report, which you cannot clear) after it's compiled by checking the **Clear** box. If totals are not cleared, the system will continue to accumulate data, and the next report will include cumulative data.

2. Click on **Start**. You will be prompted either to print the report or view it on screen.

The report is automatically saved to the disk as an ASCII file (*i.e.,* pure text with no formatting) and may be read later with a text reader or word processor. (Either NotePad or WordPad, each of which comes with Windows, will do just fine.) Be sure to note the file name so you may find it later using either the text reader, word processor or *Windows Explorer*.

Maintenance menu

This lets you back up or save the system configuration to disk, restore it from disk or send a system configuration to VoiceWorks 16.

The Maintenance menu is usable **only** when connected on-line, either remote (modem) or local (serial), to VoiceWorks 16.
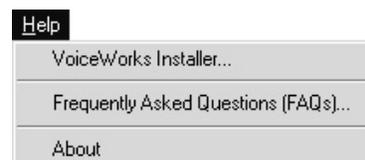
Except for initial programming, ESI recommends backing up a system before performing ANY off-line programming. The On-site Administrator may have made changes, such as adding mailbox users, to the system since the last time you made a backup.

> **Warning:** **Failure to back-up prior to off-line programming could result in irreversible deletions of mailboxes, which may contain messages.**
> Care must also be exercised when restoring a system. Restoring should take place only on either new drives or drives that have been re-initialized. **Restoring to a drive which contains programming or messages will result in over-writing all programmed data.**

Help menu

The Help menu provides four options:
- **VoiceWorks Installer** — The manual you're reading now.
- **Frequently Asked Questions (FAQs)** submitted to ESI Tech Support.
- **About** — Provides the version number of the *VoiceWorks 16 Installer* you are using.

New Site

Selecting **New Site** from the **File** menu will display a window *(top, right)* to enter site-specific information, such as site name, feature set, a description and site telephone number. Use **New Site** whenever you do the initial programming, or the first time you modify the programming of an existing site by using *VoiceWorks 16 Installer.*

After entering the site-specific information, you will be prompted to program on-line or off-line *(bottom, right).* (See "Off-line or on-line?" on page 8.)

Important: If programming an existing site, we **highly** recommend backing up the system on-line before doing any off-line programming (see the **Warning** under "Off-line," page 8).
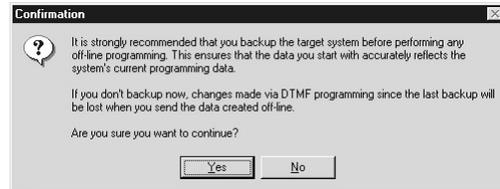
Open Site

Selecting **Open Site** from the **File** menu will display the **Select a Site** dialog box *(left),* a list of the sites currently available in the site list.

Simply highlight a site and click on **OK** (or double-click on the site name). The **Site Connection** window *(right)* will appear.

Off-line or on-line?

Off-line

The default selection is **Off-line**, so simply click on **OK** to program off-line. A reminder will appear *(right)* that recommends backing up the remote system before making any changes to the database. This will ensure that the database you modify off-line accurately reflects the current system settings.
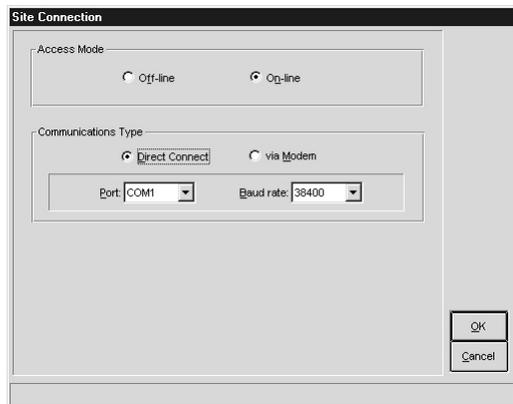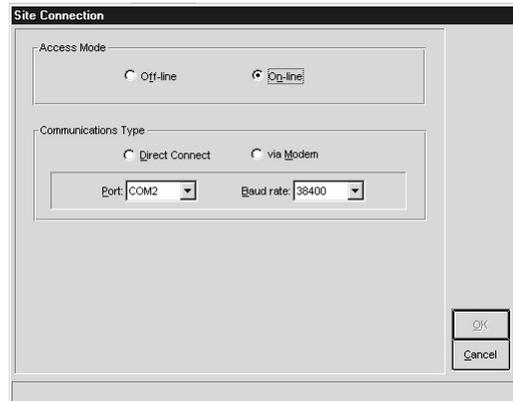
> **Warning:** The site administrator may have made changes to the system — *e.g.,* adding mailboxes — since the last backup. If these changes do not appear in your off-line programmed database, they will be deleted from VoiceWorks 16 when the site data is sent to it. ***The deletions will be irreversible!***

Click on **Yes** to begin programming.

On-line

Selecting **On-line** and clicking on **OK** will open the window further *(right)* to select either **Direct Connection** (Serial) or **Via Modem**. (See next page for more information.) Regardless of which you select, you will need to select the correct COM port for that method and a baud rate.
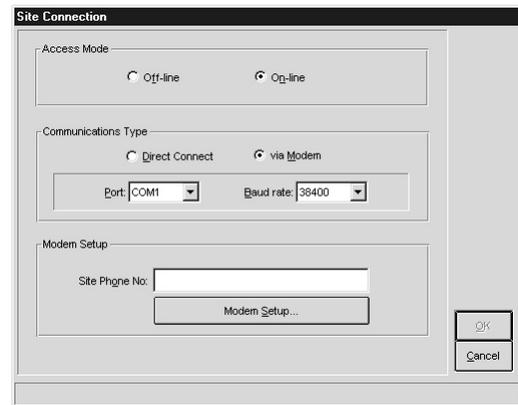
Direct Connection (serial)

This will support a 38,400-baud rate.[6] Verify the serial connection before clicking **OK** to continue. The required cable is a DB9/male-to-DB9/female. Once connected, you will be prompted to enter the installer password (the default is *789*). Begin programming values as described in the *VoiceWorks 16 Installation Manual.*

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[6] If you leave the setting at 38,400 baud, VoiceWorks 16 and the connected serial device will negotiate the highest possible rate.

Modem Connection

Connection via modem will be at 14,400 baud or less, so time spent loading data to and from VoiceWorks 16 may vary.

When **Modem Connection** is selected, the window will be opened further. If this is the initial setup of *Installer*, you will be prompted at this time to set up your modem. Select your modem from the list *(lower right)* and click the **OK** button. Modem types may be changed later by clicking **Modem Setup**. (If your modem is not listed, click on **Cancel** so you may manually enter the modem setup settings.[7] Do so, then click on **OK.**)

Once the modem setup is complete, verify the correct telephone number and make any necessary changes to the number.

Important: Your modem call must be answered by or transferred to the VoiceWorks 16 Automated Attendant.

Access the modem by dialing **9 8 8** at the main greeting ID branch. You may insert pauses into the telephone number string, between the site telephone number and the *988* input, by including commas (,). Each comma is approximately 2 seconds. An example is:
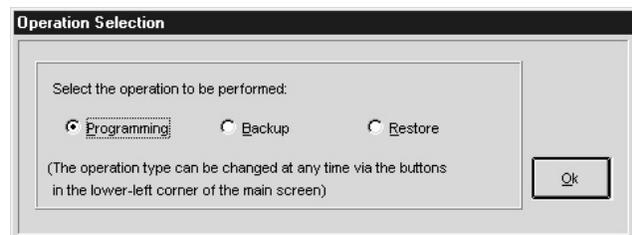
1 8 0 0 5 5 5 1 2 1 2 , , , , 9 8 8

The pauses allow a time delay, giving the remote site time to answer, before dialing the *988* access code. This is very effective in applications that answer with the auto attendant.

Live-answer requires the called party to transfer the modem call to the VoiceWorks 16 extension. This must happen before the digits *988* are dialed by the modem. Methods we have found effective are:

• Call the site first, tell the person who answers that the next call he/she takes will be the modem and ask him/her to transfer to voicemail.
• Or, use a single-line telephone connected to the phone port of the modem, if it has one. After the site answers, pick up the single-line phone and ask to be transferred to voicemail. When transferred, put the single-line on-hook and wait for the *988* to be dialed.

At this point, you're connected to the remote VoiceWorks 16. You will be prompted to enter the Installer password. After you have done so, you will see a dialog box *(right)* prompting you to choose which operation to perform. Pick one and click on **OK.**

Note: Selecting **Programming** puts you into Programming Mode, while selecting either **Backup** or **Restore** puts you into Maintenance Mode. As the box says, you can switch from one to the other at any time using either the **Programming** button or the **Maintenance** button at the main screen's lower left (see page 3).

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[7] This information may be in the modem manual, or you may need to call the modem manufacturer.

Opening a site stored on floppy disk

Sites which have been copied to floppy disk can be added to the sites on the local hard drive using the following procedure.

1. Open *Windows Explorer* if it's not already open.

2. Click on **View.**

3. Click on **Details.**

4. Click on the icon for the appropriate floppy disk (usually *A:*). The disk's files should appear in the right-hand side of the Explorer window.

5. Find the **site database** on the floppy. Site databases end with a *.v16* extension.

    Note: The **site name** is the same as the filename (without the extension) — *e.g.,* if the site file is *bank.v16*, the site name is *Bank.* (You'll need the site name in step 13.)

6. Right-click the database file on the floppy.

7. Select **Copy.**

8. Locate the *Sites* folder. Unless you specified differently in the initial setup (see page 2), this directory is **c:\esi\VoiceWorks 16 installer\sites**. The easiest way to do this is to click on the little "+" box for each folder to expose the next sub-level down. When the level is exposed, the box has a "–" instead *(right).*

9. Click on that folder so that its contents appear in the right-hand side of the Explorer window.

10. Right-click on any **blank area** within the right-hand side of the Explorer window (make sure you **don't** click on any existing file or folder).

11. Select **New.**

12. Select **Folder.** This will create a new folder **within** the site directory.

13. Give the new folder exactly the same name as the site (see step 5), by typing the folder name and then pressing **Enter**.

14. Right-click the newly created folder.

15. Select **Paste.** This copies the database file to the VoiceWorks 16 site directory's new folder. (You may close *Windows Explorer* now, if you wish.)

16. Return to (or open) *VoiceWorks 16 Installer*.

17. Select **File.**

18. Right-click on **Site List.**

19. Right-click on **Add**.

20. Enter the name of the site you are moving (*e.g.,* "Bank" — with no quotation marks, of course).

21. Click on **Close.**

22. Select **File.**

23. Right-click on **Open Site.**

24. Highlight the site you just added and click on **OK**; then proceed as normally.

Using safeguard files

VoiceWorks 16 Installer not only saves each site file as a *.v16* file but also automatically saves a duplicate, *safeguard* site file; it uses a *.bak* extension. To use a safeguard file to recover to your most recently saved setup if something goes wrong during a programming operation:

1. Close *VoiceWorks 16 Installer* if it's running.
2. Open *Windows Explorer* if it's not already running.
3. Click on **View.**
4. Click on **Details.**
5. Locate the *Site* folder. (See step 8 under "Opening a site stored on floppy disk," page 10.)
6. Click on that folder so that its contents appear in the right-hand side of the Explorer window.
7. Right-click on the appropriate site file, such as *bank.v16*, for which you need to recover to your most recently saved setup.

    Note: *Windows Explorer* will require you to rename this file (as we will do in steps 8–12) before you work with the safeguard file.

8. Click on **Rename.** This will highlight the filename for editing.
9. Press the **End** key to move the cursor to the end of the filename.
10. Backspace over "v16" (but **not** the period) and type "saf" or some other *extension*.

    Note: If you see a box warning about the file becoming unusable and asking whether you're sure you want to change the filename extension, just click on **Yes**.

11. Right-click on the site's appropriate *.bak* file, such as *bank.bak.*
12. Select **Copy.**
13. Right-click on the right-hand side of the Explorer window (*i.e.,* do *not* click on any file).
14. Select **Paste.** This creates a copy of the *.bak* file so you can return to it if necessary.
15. Right-click on the *.bak* file**.**
16. Click on **Rename.** This will highlight the filename for editing.
17. Press the **End** key to move the cursor to the end of the filename.
18. Backspace over "bak" (but **not** the period) and type "v16" — this turns the safeguard file into a site file. (You may close *Windows Explorer* now, if you wish.)

Remaining functions

The *VoiceWorks 16 Installation Manual* (and its *Acrobat Reader* version — easily accessible from *Installer's* **Documentation** menu — shipped with this software) provides extensive instructions for programming VoiceWorks 16.

Technical support

Error log

VoiceWorks 16 Installer has a built-in debug program. In the unlikely event that *Installer* has an operational error, a dialog box will appear, reporting the error and prompting you to type exactly what you were doing when the error occurred. This will create a file within the application *(fserror.log)* that reports in detail to our software engineers, the nature and cause of the failure.

Please report any bugs to the ESI Technical Support Center (see below); be prepared to provide a copy of the error log.

ESI Technical Support

The ESI Technical Support Center is available 7 AM–7 PM Monday through Thursday and 8 AM–5 PM Friday (all times Central). If you need assistance with *VoiceWorks 16 Installer* that this software's Help files, its Acrobat Reader files and your printed documentation don't provide, please contact ESI Tech Support by either calling 800 491-3609, faxing to 972 422-9705 or sending e-mail to **techsupp@esi-estech.com**.

Note: If you have any questions about setting up and/or using Adobe Acrobat Reader on your PC, please point your browser to the Adobe Web site at **http://www.adobe.com**.