

VIPTM
for Microsoft® Outlook®

Quick-Reference User's Guide

0450-0630
Rev. B



We Make It Easy To Communicate

Contents

Introduction	1
VIP: An overview	2
Setting up VIP	6
Using VIP	13
<i>VIP</i> Call Control window: Quick overview	13
Unified messaging	15
Saving voice messages as .WAV files.....	17
Contact management.....	18
Basic call commands	19
Call activity folders in <i>Outlook</i>	20
Station programming in <i>VIP</i>	21
Customization	22
Customizing the Call Window command buttons.....	22
Customizing the <i>VIP</i> toolbar	22
Troubleshooting	23
Index	

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:

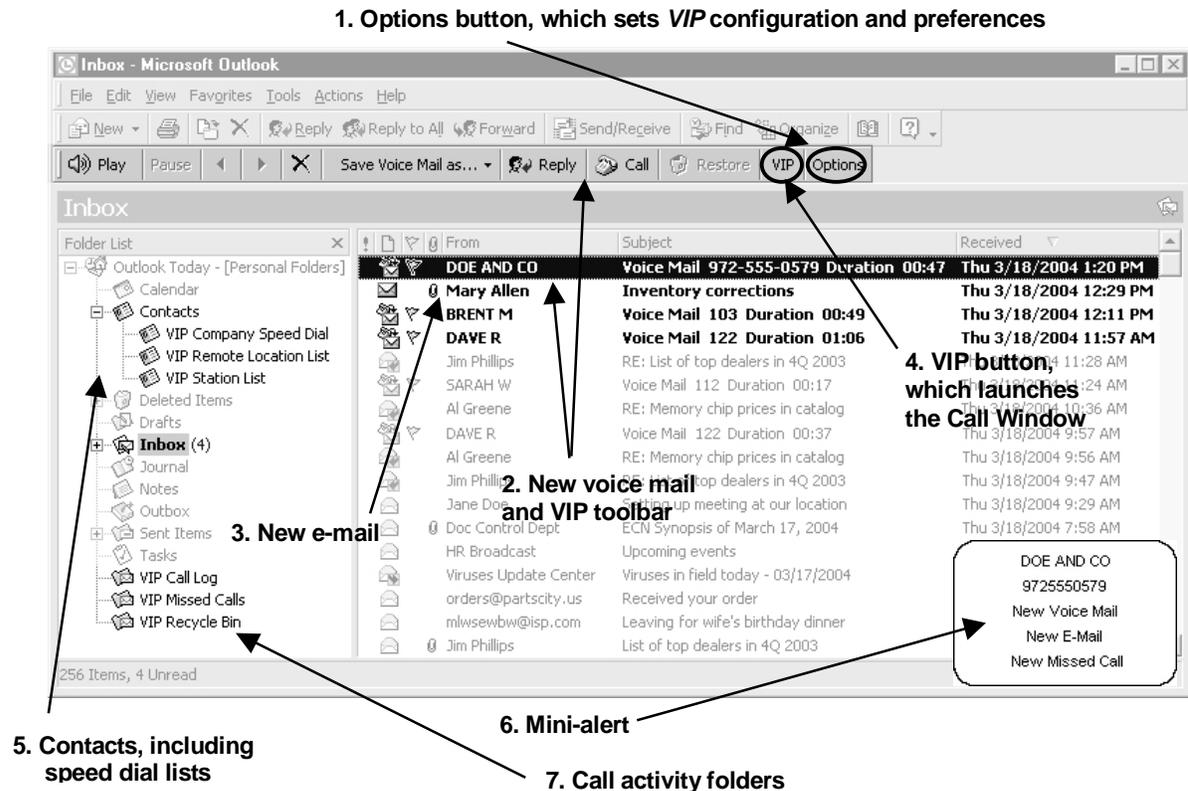
- **Manage your telephone calls** — Handle incoming and outgoing calls to your station¹, in conjunction with various ESI system features.
- **Manage your voice mail** — View your voice and e-mail messages, live call recordings, and personal memos in one *Outlook* Inbox; prioritize each message by importance; 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** in the *VIP Setup and User's Guide* (ESI #0450-0513).

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 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.

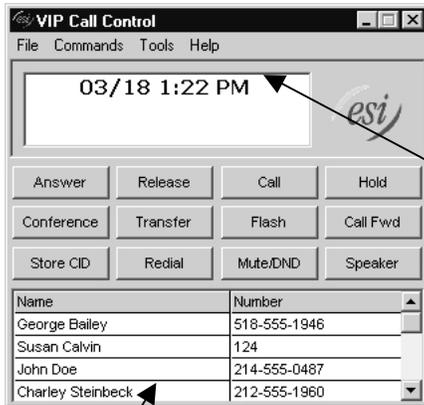
¹ For network information, contact your ESI Reseller or System Administrator.

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.

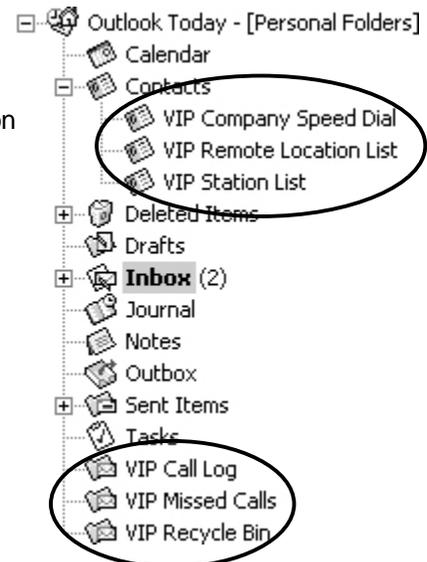
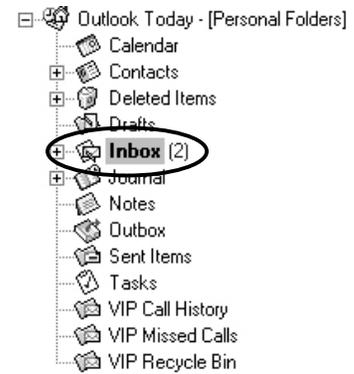
The **VIP Quick Call list** is a list of names you add by dragging-and-dropping names from your *Outlook* Contacts and speed-dial lists. Once the list is populated, you can scroll through the alphabetical *VIP* contact list, highlight the name, and double-click to place a call to that person.

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:

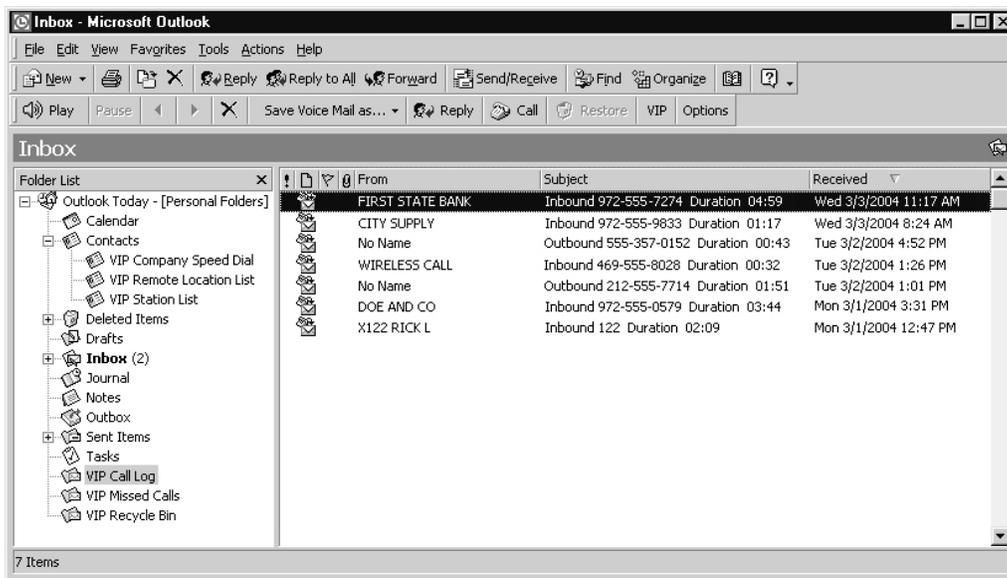
- **Incoming call** — Click the Caller ID information. This takes you to the Call Window, where you can handle the call.
- **New voice mails messages or e-mails** — Click *New E-mail* or *New Voice Mail*. This takes you to the *Outlook* Inbox, where you can view your messages.
- **Missed calls** — Click *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
 - IVX E-Class²
 - IVX S-Class²
- ESI Digital or [local] IP 48-Key Feature Phone³ 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)
- *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

¹ IVX X-Class has a built-in NSP.

² Generation II systems only.

³ Currently, VIP doesn't support Remote IP Feature Phones.

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

ESI makes the *VIP* installer software available both on a CD-ROM and as a free download from ESI's *User's Guide* Web site.² If you get the CD-ROM, proceed to "To install *VIP*" (*below*). However, if you are working with the Web download, 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*. 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
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 them, *Setup.exe*,³ 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.
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:

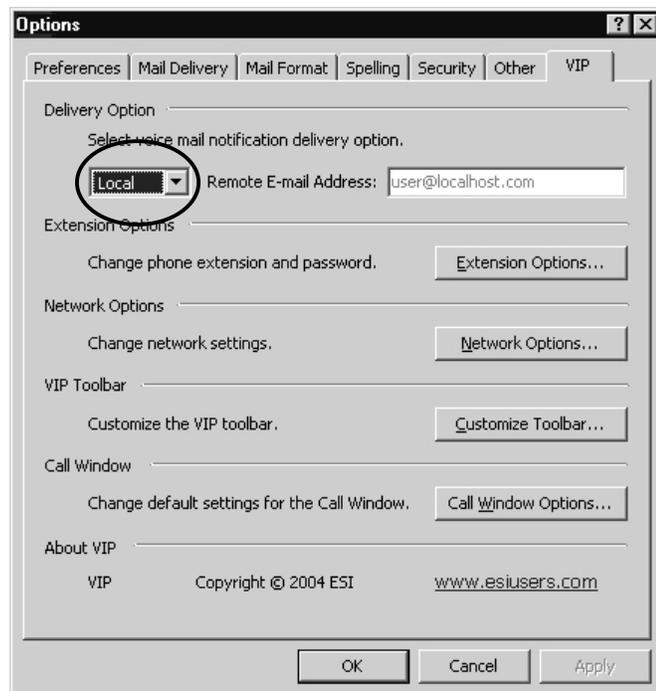
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Set voice mail delivery

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.¹
(Default: Local.)
2. Click **Apply** to make the other necessary setup changes — or click **OK** if you're done.

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¹ For information on remote delivery, see "Advanced options" in the *VIP Setup and User's Guide* (ESI #0450-0513).

Set extension options

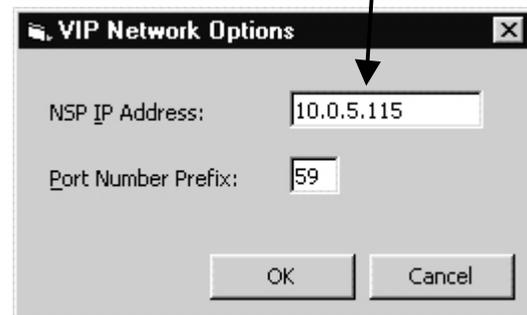
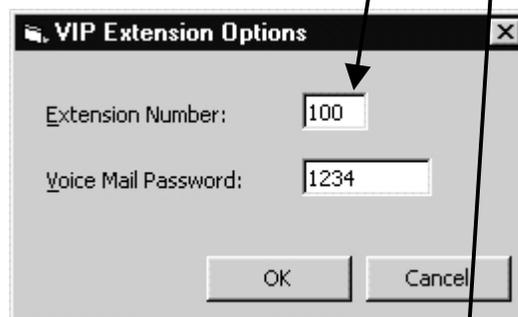
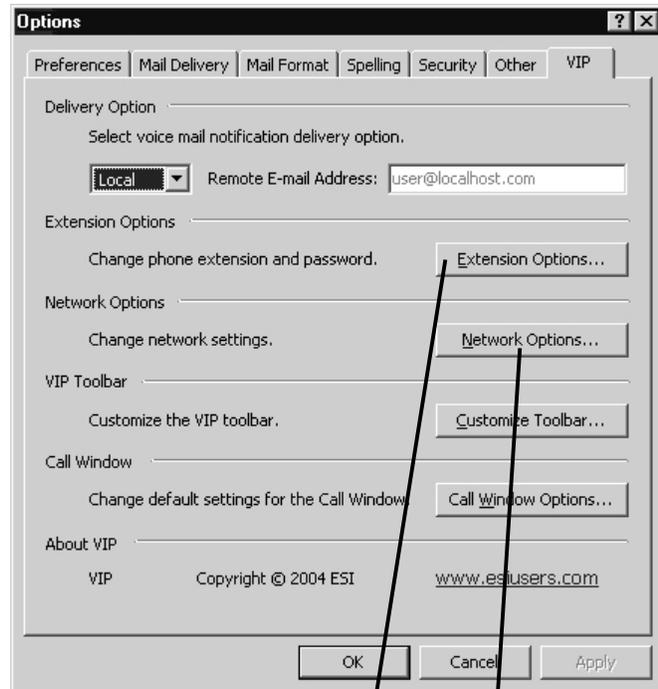
The extension and password you use for *VIP* **must** match your phone system extension and voice mail password. The configuration window should automatically appear if this is the first time installing *VIP* on this PC. You can also manually launch the configuration window by clicking **Options** on 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 Options**. The *VIP* **Extension Options** 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**.



Set network options

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

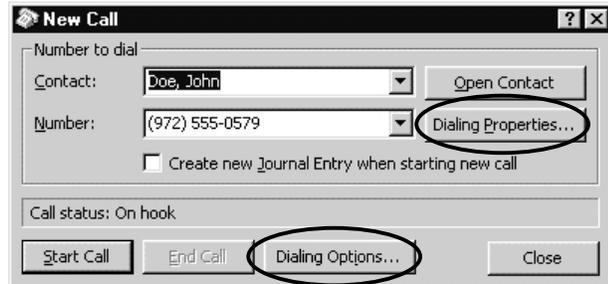
To set network options:

1. Click **Network Options**. The *VIP* **Network Options** 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

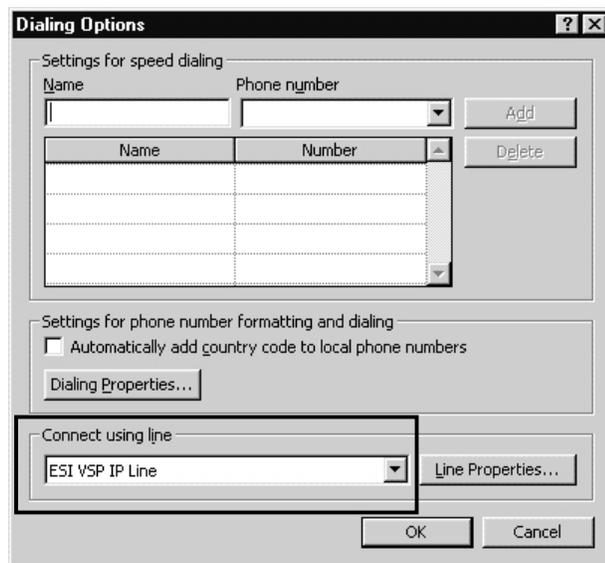
You will need to set up Outlook dialing rules in order to make calls from Outlook (or the VIP Quick Call list in the Call Window).

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 VSP IP Line**, as shown.
3. Click **OK**.

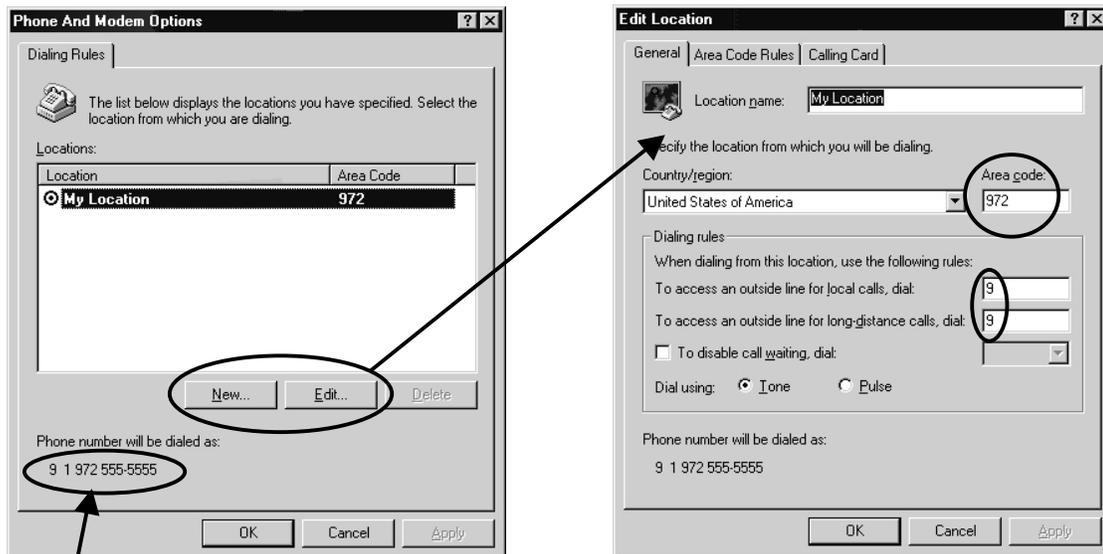


Dialing Properties

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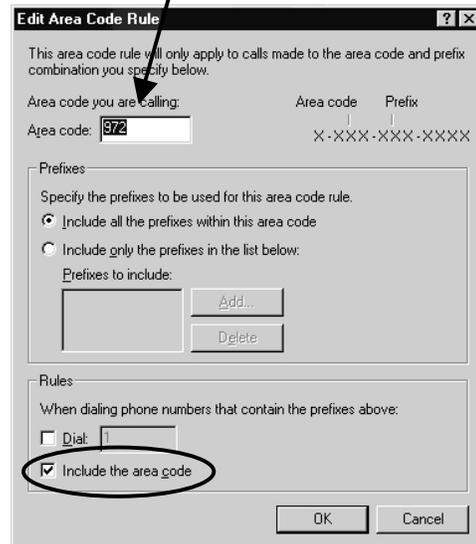
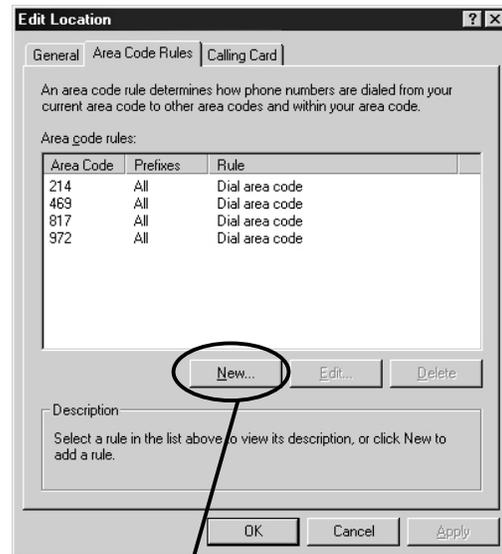
5. Now click the **Area Code Dialing Rules** tab.

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

Example: If you live in the area of Dallas/Fort Worth, Texas, you'll want to add all the area codes (at press time: 214, 469, 817, and 972) within your region/area. Many cities or areas will have only one area code.

7. To include the area 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

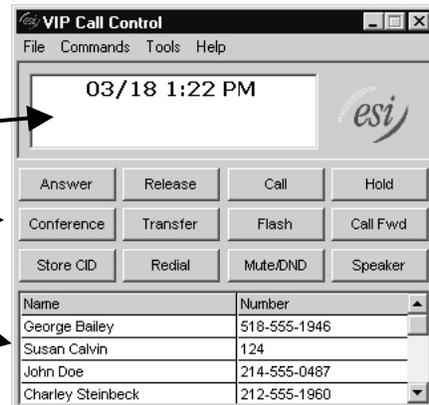
VIP Call Control window: Quick overview

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:

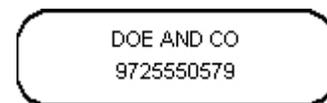
- **Menu bar** — Gives you access to all available call commands and user help.
- **Display** — A three-line call status display similar to the phone's display.
- **Call-command buttons** — Perform desired call-handling functions.
- **VIP Quick Call list** — Includes an unlimited number of contacts,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



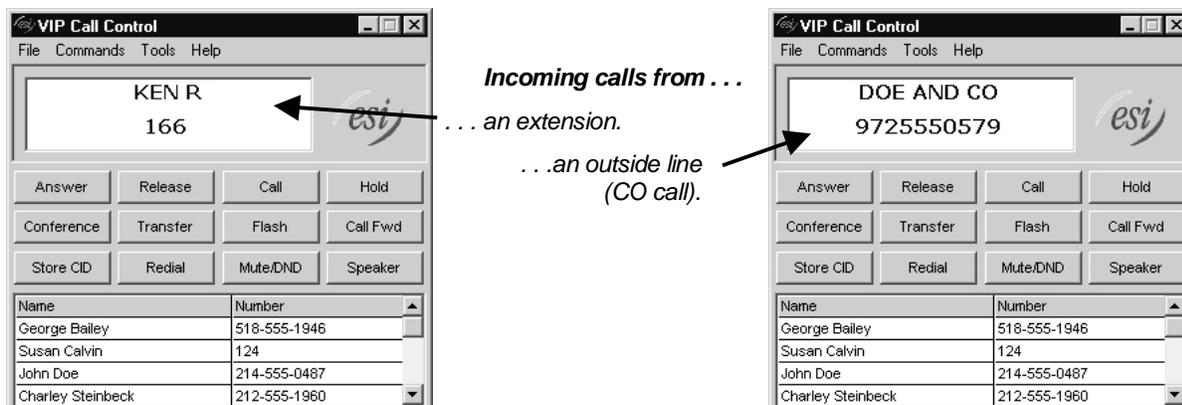
Note: You can customize these options (see "Customization," page 22).

(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.



Note: For all other ways to handle an incoming call, see “Advanced options” in the *VIP Setup and User's Guide* (ESI #0450-0513).

Placing an outbound call

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

1. Put the cursor in the middle of the display.
2. Type in the desired extension or phone number², 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 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. For you to do so, the *VIP Call* Window must be “on top of” all other running applications.

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).

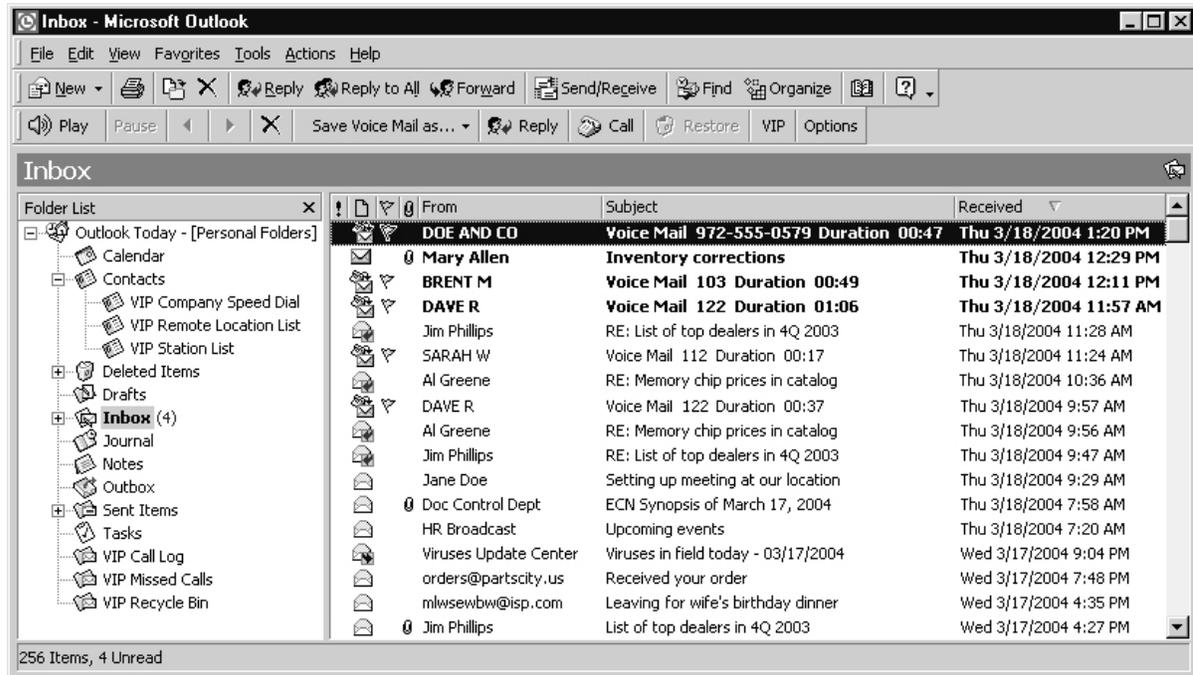
¹ Other available methods, described in the “Advanced options” section of the *VIP Setup and User's Guide* (ESI #0450-0513), involve using:

- The *VIP* Quick Call list.
- Speed-dial lists and *Outlook* Contacts.
- Voice mails and Call Log records.

² If necessary, include a line access code (such as “9”) at the beginning of an outgoing call's phone number.

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.



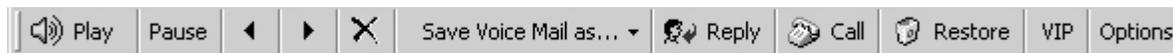
Quick overview

- 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 20).
- 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 22).



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.

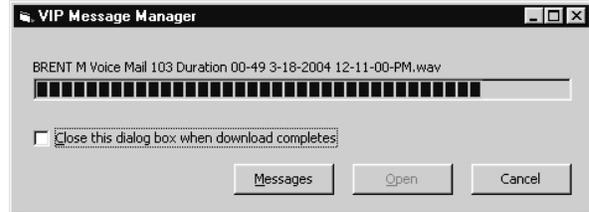
Toolbar reference guide

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 Call Control</i> 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 Options</i> 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

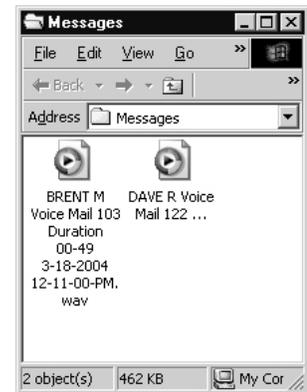
1. Highlight the desired voice mail message and click the **Save Voice Mail as...** button; then select **WAV File**.
2. A **VIP Message Manager** status box (shown, *right*) will appear to show the progress of the voice mail message being converted into a .WAV file. This is also the only opportunity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

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

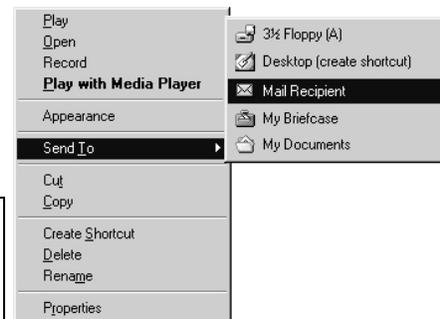
Note: The folder shown here — *c:\Program Files\VIPMessages* — is where *VIP* stores .WAV files.



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. 18).
- Any voice mail message, call log records, or missed call records with Caller ID.

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 contact list

1. Highlight, and double-click, the desired name in the *VIP* contact 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**).

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" in the *VIP Setup and User's Guide*, ESI part #0450-0513).

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.22).

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.

Answer

Clicking this button answers the phone, using the speakerphone. If you wish to have a more private conversation, just pick up the handset.

Call

Places a call once you have dialed a number by typing it in or clicking on a contact (either in *Outlook* or *VIP*, including the Quick Calls list).

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."

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.

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. Here are the rules that *VIP* uses to determine which types of calls to include in the 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 ACD¹ 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.



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*.

¹ Automatic call distribution. For more information, see the *VIP Setup and User's Guide* (ESI #0450-0513).

Station programming in VIP

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**. (You can't undo changes after you've clicked **Apply**.)

Note: For more detailed information on this topic, consult the *VIP Setup and User's Guide* (ESI #0450-0513).

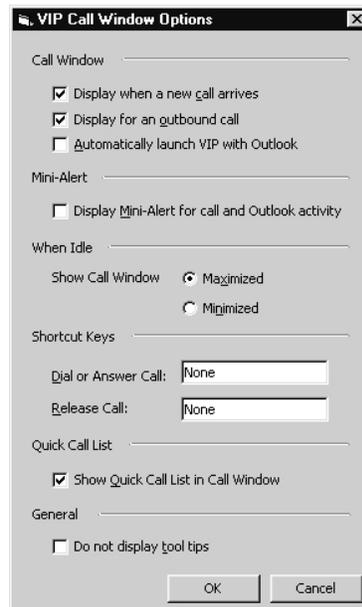
Customization

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

Customizing the Call Window

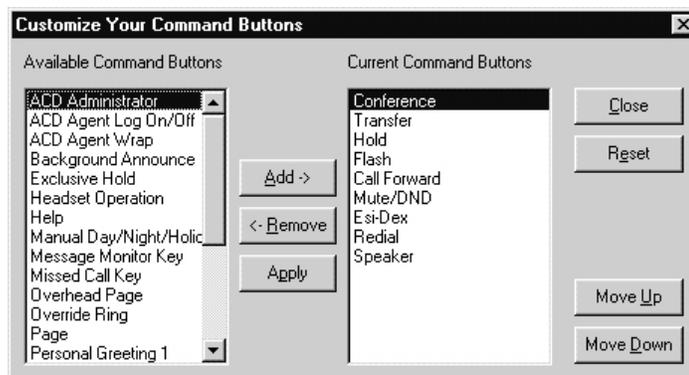
To customize the *VIP* Call Window, click **Options** on the *VIP* toolbar in *Outlook*, and then choose the **VIP** tab. This lets you make the following settings.

- **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.

Troubleshooting

If you encounter difficulty with *VIP*, check the following items first:

- Does your station have a password set (**PROGRAM 5 1**), and does it match the one entered in *VIP Extension Options*?
- Did your System Administrator give your station access to use *VIP*?
- Does the NSP IP address and port number that your installing ESI Reseller entered in the ESI phone system match the one entered in *VIP Network Options*?

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.

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.

Note: For more detailed help with any difficulties you may have with *VIP*, consult the "Troubleshooting Chart" in the *VIP Setup and User's Guide* (ESI #0450-0513).

Index

- Call activity folders, 20
- Configuration, 8–9
- Contact management, 18
- Customization, 22
- Esi-Link, 3, 18
- Extension options, 9
- Speed-dial lists, 3, 18
- Toolbar reference guide, 16
- User information, 8
- User Programming** window, 21
- VIP
 - Installing, 7
 - Repairing, 23
- VIP Call Control** window
 - Overview, 13
- VIP* Quick Call list, 13, 18, 22

NOTES



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