

Esi-Mail™

Setup and User's Guide

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Rev. A



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Product details are subject to change without notice.

Introduction

Esi-Mail™ is a unified messaging option for the ESI E-Class phone systems. With ESI's Esi-Mail, you can view your voice and email messages in one inbox¹, prioritize each message by importance, and select for playback voice mail messages in any order.

The Esi-Mail toolbar integrates with Microsoft® Outlook 2000/2002® and allows for **synchronized** control between your Outlook inbox and your ESI Phone System voice mailbox. For example, as you delete voice mail messages using your Outlook inbox, they are deleted from your voice mailbox. While listening to a message, you can easily reply to or call back the user that left the message. Any time you launch Outlook, your inbox reflects all the message activity in your voice mailbox.

Full voice mail control is provided through an Outlook add-in toolbar. Voice mail messages are played through the ESI Feature Phone associated with the voice mailbox, eliminating the need for PC speakers or an external microphone.

While out of the office, remote email notification allows you to keep track of incoming voice mail messages when using an Internet email account. Each notification is delivered to your specified email address and includes the date, time, and the caller's name and number (if Caller ID is available).

Microsoft Outlook 2000 or Outlook 2002 and the Esi-Mail software must be installed on your computer before you can use Esi-Mail unified messaging. Esi-Mail software is not required for remote email notification.

About this guide

This guide covers the following topics

- System requirements
- Installation
- Configuration
- Using Esi-Mail
- Troubleshooting

¹ Esi-Mail currently supports Outlook 2000 and 2002 only.

System requirements

ESI hardware requirements

- ESI E-Class Phone System with installed Network Services Processor (NSP)
 - ESI Feature Phone at the extension
-

Computer system requirements

Software Requirements

- Windows® 98, 2000, ME, XP, or Windows NT 4 with service pack 4 (workstation only) Operating System
- Microsoft® Outlook 2000® or Microsoft® Outlook 2002®

Hardware Requirements

- Intel Pentium II 400 MHz processor or higher
- 128MB RAM required
- 3MB additional Free Disk Space (for temporary Setup files)

Installation

The ESI Reseller or System Administrator has enabled your voice mailbox for Esi-Mail and provided you with the Esi-Mail Installer (either on CD or on your network). If you aren't sure if your voice mailbox is enabled for Esi-Mail, please contact your System Administrator.

If this is the first time installing Esi-Mail on this PC, you will need to refer to *Appendix A User information* on page 13 for your specific setup information. You will be prompted for this information during the course of Esi-Mail installation and configuration.

Note: If you are installing Esi-Mail on Windows NT, 2000, or XP, you must have Administrator login privileges before continuing the installation. See your System Administrator if you're not sure if you have Administrator login privileges.

Important: If you are installing Esi-Mail and have a previous version on your system, you **must** uninstall the previous version.

To uninstall Esi-Mail

1. Make sure Outlook is closed before uninstalling Esi-Mail
2. Select **Settings** from the Windows Start menu.
3. Select **Control Panel** and double-click **Add/Remove Programs**.
4. Choose **Esi-Mail**.
5. Click **Yes** when prompted to confirm removal.

To install Esi-Mail

1. Make sure Outlook is closed before installing Esi-Mail
2. If you haven't done so already, assign a password at your phone by pressing the **PROGRAM** key and dialing **51**. Follow the prompt instructions to set a password.
3. Access the CD or directory that contains the Esi-Mail installer.
4. Double-click the Esi-Mail installer.
5. Follow the installation instructions displayed by the Esi-Mail setup wizard.
6. When the installation is complete, launch Outlook.
7. If this is the first time installing Esi-Mail on this PC, you will be prompted to select the Esi-Mail tab in the Options window. Proceed to the *Configuration* section. If not, proceed to step 8.
8. Installation is complete.

Configuration

This section contains configuration instructions, such as setting delivery options (local or remote), updating your extension and password settings, and entering network settings. If you are installing Esi-Mail on your PC for the first time, refer to *Appendix A User information* on page 13 for your specific information.

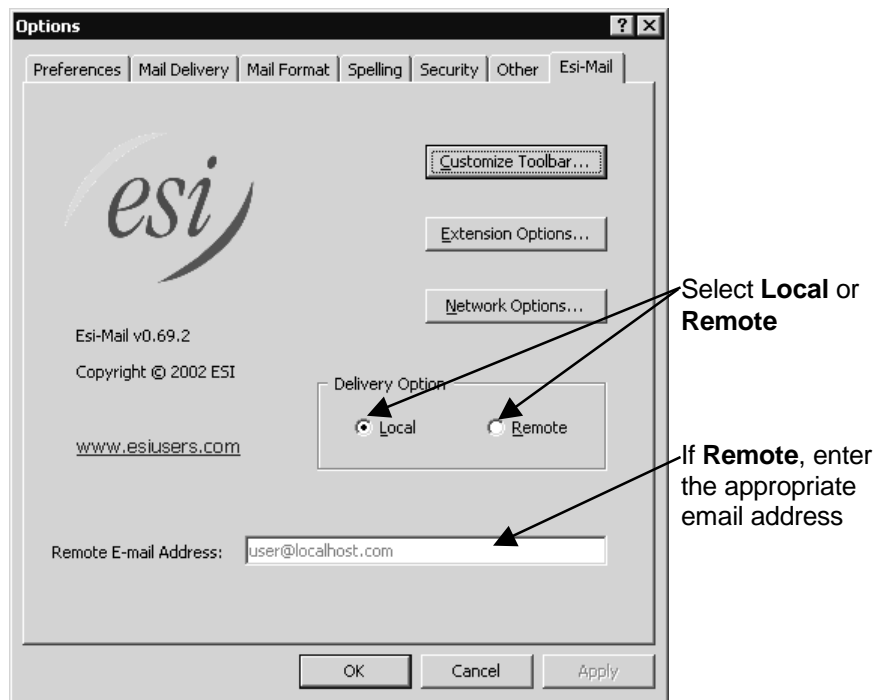
Set local/remote delivery option

You can use Esi-Mail locally (while in the office) or you can receive voice mail notification via your Email account (while off-site or traveling). The delivery option can be set depending on how you want use Esi-Mail. You can set the delivery from Esi-Mail, your ESI Feature Phone, or from outside the system.

Note: While using Esi-Mail **remotely** (while out of the office), you will only receive email notification of new voice mail messages. To play voice messages from a remote location, you must dial into the phone system. Esi-Mail software is not required to receive remote voice message notification.

To set the delivery option using Esi-Mail:

1. Click **Options** on the Esi-Mail toolbar (or select **Options** from the Tools menu.)
2. Select the Esi-Mail tab.
The Esi-Mail configuration window displays.



3. Select **Local** or **Remote** using the radio button.
Default: **Local**.
If you choose **Remote**, enter the forwarding email address (if necessary) in the **Remote E-mail Address** field.
4. Press **OK** or press **Apply** to make more changes.

To set the delivery option from your Feature Phone

1. Press **PROGRAM 65**.
2. Do one of the following:
 - Press **0** for remote email notification, press **#** to confirm and continue to step 3.
or
 - Press **1** for Esi-Mail unified messaging, press **#** to confirm and hang up.
You will now receive voice mail notification in your Outlook inbox.
3. Enter the forwarding email address using the dial pad.
Press the appropriate dial pad key until the appropriate character is displayed.
Press **#** for the **@** symbol, continue entering the address.
Use **▼** scroll key to go back to previous characters.
4. Press **#** to confirm.
You will now receive remote email notification at this email address when a message is left in your voice mailbox.

To set the delivery options from a remote location:

Note: For remote email notification, you must set the forwarding email address from either the Esi-Mail options or your ESI Feature Phone. You cannot enter an email address remotely. See step 3 above to enter the forwarding email address from a Feature Phone.

1. Call into the system.
2. If the auto attendant's main greeting answers your call, press ***** and enter your mailbox number. If the operator or another user answers your call, have the person transfer you (by pressing **VOICE MAIL** and *****, then pressing your station key [or entering your mailbox number] and then hanging up).
3. If required, enter your password.
4. Press **565**
5. Do one of the following:
 - Press **0** for remote email notification, then **#** to confirm and hang up.
You will now receive remote email notification at the specified email address when a message is left in your voice mailbox.
 - Press **1** for Esi-Mail unified messaging, press **#** to confirm and hang up.
You will now receive voice mail notification in your Outlook inbox.

Set extension options

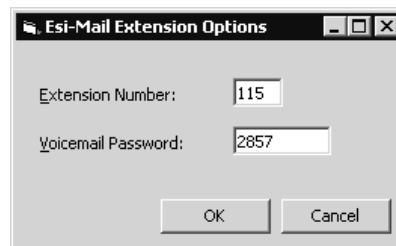
The extension and password you use for Esi-Mail **must** match your phone system extension and voice mail password. If you change your phone system extension or password, you must update your Esi-Mail settings. Use the space provided in *Appendix A User Information* to record your any changes for future reference.

To change your Esi-Mail extension and password:

1. Click **Options** on the Esi-Mail toolbar (or select **Options** from the Tools menu.)
2. Select the Esi-Mail tab.
The Esi-Mail configuration window displays.



3. Click **Extension Options**.
The Esi-Mail Extension Options window displays.



4. Enter your extension number and current voice mailbox password in the appropriate fields.
Then, press **OK**.
5. Press **OK** when the Esi-Mail configuration window displays or press **Apply** to make more changes.

Set network options

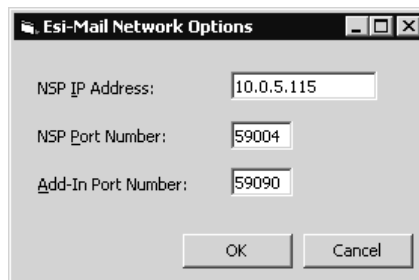
If this is the first time you are installing Esi-Mail on this PC, you will need to make the following network settings. Use the space provided in *Appendix A User Information* to record your information for future reference.

To set network options:

1. Click **Options** on the Esi-Mail toolbar (or select **Options** from the Tools menu.)
2. Select the Esi-Mail tab.
The Esi-Mail configuration window displays.



3. Click **Network Options**.
The Esi-Mail Network Options window displays.



4. Using *Appendix A User information* on page 13, enter the network information for each field. Then, press **OK**.
5. Press **OK** when the Esi-Mail configuration window displays or press **Apply** to make more changes.

Using Esi-Mail

Esi-Mail is seamlessly integrated with your Outlook inbox. When you open Outlook, Esi-Mail **synchronizes** with your phone system voice mailbox. For example, new voice mail messages left in your voice mailbox will be reflected as new voice mail notifications in your Outlook inbox.

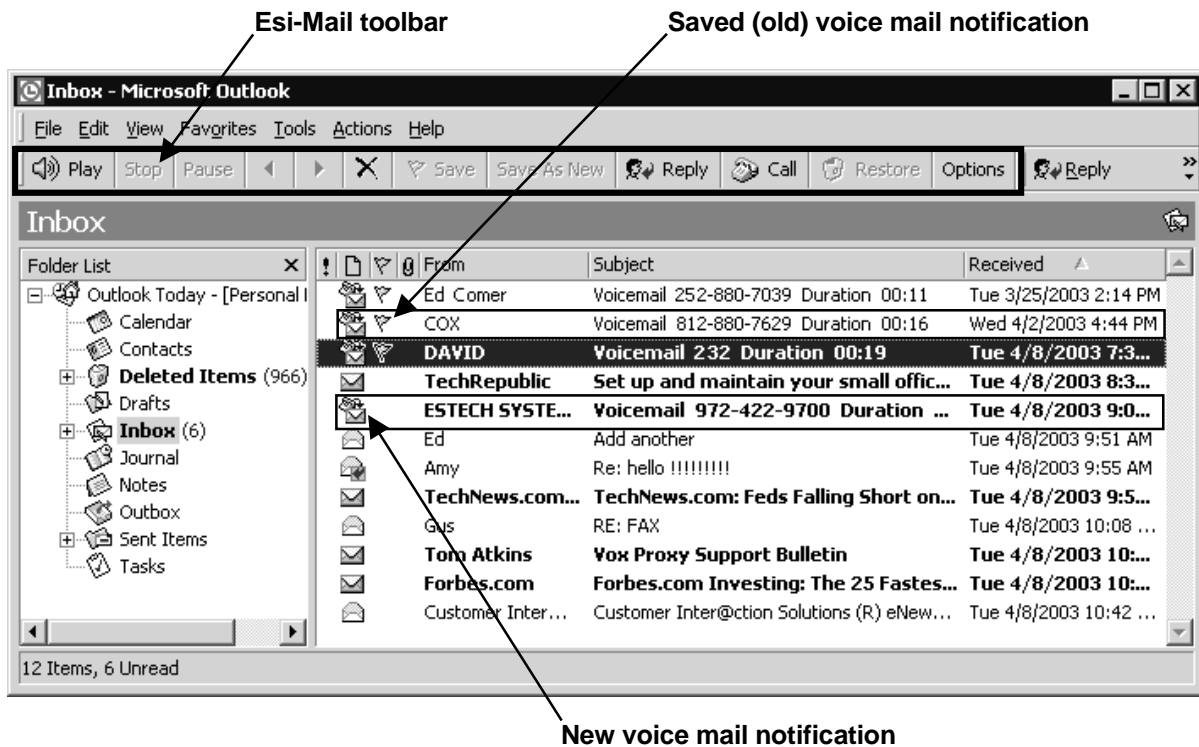
Quick overview

The voicemail notification header displayed in the Outlook inbox contains name and number information (Caller ID)¹, message duration, date and time. A header displayed in boldface font indicates a new message. Messages can be played in any order by clicking the email and then clicking the **Play** button; the message will be played through the speaker or handset of the ESI Feature Phone associated with the voice mailbox. After the message has played, and it is not saved or deleted, it is treated as **new**. If the message is deleted, the header will be moved to Outlook's Deleted Items folder. Up to ten of the most recent deleted messages can be restored from the deleted items folder in Outlook. Older voice message notifications will remain in the Deleted Items folder, but cannot be played.

After a message is played via Esi-Mail, your Feature Phone will remain connected to voice mail for several seconds to allow you to manipulate the voice message from the phone. You can save the message, store Caller ID to your Personal Dex, and delete or move the message, all from your Feature Phone. If you need to place a call while the phone is still connected to voice mail, either press the **RELEASE** key or pick up the handset and then hang up.

You can use Esi-Mail locally (while in the office) or you can receive email notification remotely via your Email (while off-site or traveling). See *Set local/remote delivery option* on page 4.

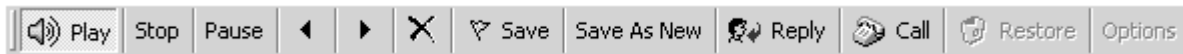
Note: While using Esi-Mail notification **remotely** (while out of the office), you will only receive email notification of new voice mail messages. To play voice messages from a remote location, you must dial into the phone system. Esi-Mail software is not required to receive remote email notification.



¹ Caller ID is provided by your telephone service company.









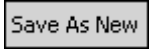




Using the toolbar

The Esi-Mail toolbar allows you to easily manage and prioritize voice mail messages with familiar buttons. You can customize the toolbar to display only the buttons you want (See *Customize the toolbar* on page 10).



If a button is “grayed out” that function is not available. For example, the **Reply** button is accessible when a selected voice mail message is left by another station (inside caller) and “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.

The following table provides a quick reference of the toolbar and Esi-Mail's functions.

Toolbar icon	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 header. For privacy, pickup the handset. Once the message is playing, clicking Play again rewinds the message to the beginning.
	Stop	Stops a currently playing voice mail message. You can also stop a voice mail message by hanging up or pressing SPEAKER on your ESI Feature Phone.
	Pause	Pauses a currently playing voice mail message.
	Rewind	Rewinds the currently playing voice mail message to the beginning.
	Fast Forward	Advances the currently playing voice mail message by 4 seconds.
	Delete	Deletes the selected voice mail message notification. The message moves to the Deleted Items folder in Outlook and to the Recycle Bin of your voice mailbox.
	Save	Saves the selected voice mail message as an old message in your voice mailbox. Saved messages are indicated by  (Follow Up flag), and are un-bolded. The status is also reflected on your phone's display.
	Save As New	Saves the selected voice mail message as new in your voice mailbox. The voice message notification is bolded.
	Reply	Sends a reply voice mail message in the original sender's voice mailbox. You will hear the originator's greeting on the speaker of your phone (or pickup the handset). Leave a reply message, and press SPEAKER or hang up. This feature can only be used for station-to-station calls.
	Call	Initiates a call back to the inside or outside voice mail originator. ¹ To end the call, press STOP .
	Restore	Restores a deleted voice mail message as a saved (old) message. The status is also reflected on you phone's display. ²
	Options	Displays the Outlook Options window. Click on the Esi-Mail tab to display the configuration options. You can customize the toolbar, configure extension, network, and delivery options, and set your remote email address.

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

² The ten most recently deleted voice mail messages may be restored.

Customize the toolbar

To customize the Esi-Mail toolbar:

1. Click **Options** on the Esi-Mail toolbar (or select **Options** from the Tools menu.)
2. Select the Esi-Mail tab.
The Esi-Mail configuration window displays.



3. Click **Customize Toolbar**.
The Esi-Mail Customize Toolbar window displays.



4. Check the buttons you want to display, uncheck the buttons you want to hide.
Then, press **OK**. (**Play** and **Stop** cannot be unchecked.)
5. Press **OK** when the Esi-Mail configuration window displays, or press **Apply** to make more changes.

Troubleshooting

Issue	Solution
Notification messages do not appear in the Outlook inbox.	Verify the password on your phone (PROGRAM then 51) matches the password set in Esi-Mail (see page 6)
	Verify that the appropriate delivery option is set. See <i>Set local/remote delivery option</i> on page 4.
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.
Error message "Timed out trying to Connect to ESI NSP at ..."	Verify that the correct information is entered under Esi-Mail Network Options. See <i>Set network options</i> on page 7.
Esi-Mail toolbar is missing	Verify that only one instance of Outlook is running (Check the Window taskbar). Esi-Mail will only run in the first instance of Outlook.
	Check to see if the Esi-Mail toolbar is "floating".
	Right-click the Outlook toolbar and verify that the Esi-Mail is checked.
When double-clicking a voice mail notification to play a voice mail, the message does not play and a window opens.	This may occasionally occur during busy times. Use the Play button to play messages.
Right-clicking a voice mail notification does not work (does not bring up the context menu).	This can occur when Outlook first opens. It is normal for Outlook and Esi-Mail to take a few seconds to synchronize . If this occurs, wait a few seconds and try again.
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 (not lit).

NOTES:

Appendix A User information

1. The location of the Esi-Mail program installer file:

2. Your extension number: _____

3. Your voice mail password: _____

4. The NSP IP Address:

			.				.				.			
--	--	--	---	--	--	--	---	--	--	--	---	--	--	--

5. The NSP port number:

		0	0	4
--	--	---	---	---

6. The Add-in port number:

		0	9	0
--	--	---	---	---



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