



VIP PC Attendant Console

Connecting to customers . . . expertly

Powerful and professional call management tools

Introduction

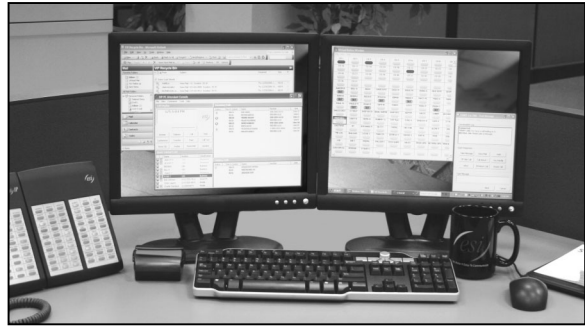
VIP PC Attendant Console¹ is designed to serve the specific needs of the busiest attendant. Everything an attendant needs to efficiently handle the demands of a high-traffic environment is just a mouse click away. *VIP PC Attendant Console* provides the same features as *VIP Professional*, and combines the power of the ESI phone system and *Microsoft® Outlook®*. This foundation provides attendants with a comprehensive set of productivity tools, including one-click call handling, unified messaging, contact and call management, and text messaging.

Note: Installation of a *Microsoft Exchange®* server is **NOT required** for operation of any *VIP* application.

Multitasking becomes no task at all, with the built-in simultaneous call-handling functions of this powerful PC-based application. It is easy to manage outside callers, internal users, recalls, and held calls with familiar *Windows®* views and operation.

The attendant can display *VIP PC Attendant Console* screens on the same monitor used for other business applications, like *Microsoft Word®* and *Excel®*. For even more convenience and manageability, dual monitors may be configured as an extended desktop, so all concurrently running applications are always visible.

In addition to the regular *VIP* Call Display view, the *VIP PC Attendant Console* Call Display includes two distinct sections specifically for the use of an attendant: the **Incoming Calls** view and the **Holding Calls** view. In addition, a separate window is available, providing one-click transferring and “at-a-glance” monitoring of status for up to 400² stations.



Benefits summary

- **Advanced call handling** increases efficiency during periods of heavy incoming traffic.
- **Familiar Windows format** is intuitive, requiring less training.
- **Drag-and-drop** functionality enhances rapid call processing.
- Lets user **organize and sort** virtual station buttons by various methods, to easily locate employees and determine their availability.

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Note: To learn more about ESI's other *VIP* applications mentioned herein, consult the appropriate *Product Overviews* (see page 7). Certified ESI Resellers may download these and other ESI documents mentioned herein from www.esiresellers.com (password required).

Color brochure available

ESI part #0450-0913 (www.esi-estech.com/brochures).

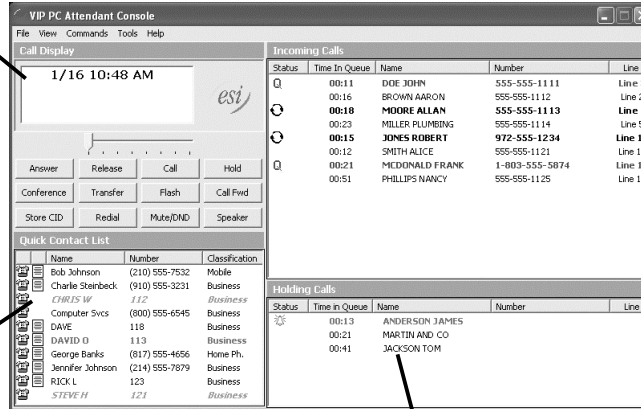
¹ Originally called *ESI PC Attendant Console*.

² On the ESI-1000 and ESI-600; quantity is 200 on other *VIP PC Attendant Console*-compatible ESI systems.

Features at a glance

The main screen of *VIP PC Attendant Console* is comprised of four distinct sections that assist in the smooth and professional processing of calls.

Call Display — Call activity is presented on the three-line “LCD” that emulates the display of the 48-Key Feature Phone. A slide bar controls the volume of the phone handset or headset from the PC. Up to 16 of the 20 command keys may be configured to customize VIP PC Attendant Console for individual attendant preferences.



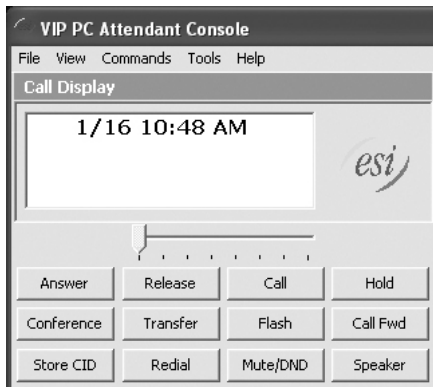
Incoming Calls — All calls presented to the attendant appear in this section, including inbound and re-routed calls. Recognizable icons and stylized text provide visual indications of the nature of each call, and the relative urgency to answer. VIP PC Attendant Console is equipped with its own queue where calls that cannot be answered in a timely fashion are put on hold automatically.

Quick Contact List — Populate Microsoft Outlook Contacts by a simple drag-and-drop, permitting the attendant to access all frequent contacts easily at all times. Calling any contact is easy by clicking on the name or “phone” icon. Click the “memo” icon to quickly send an internal text message or e-mail. Station status is indicated by the use of color-coded text.

Holding Calls — Displaying all held calls in one central location ensures no caller is forgotten and makes them easier to manage efficiently. Calls on system hold and those held by the attendant can be prioritized for handling based on recalling status, time in queue, or Caller ID. Font weight and color, as well as intuitive icons, help the attendant make informed call-handling decisions.

- **Call Display** — Gives the attendant access to all *VIP Professional* call-handling functions. A three-line “LCD” shows time, date, and relevant call activity information such as Caller ID of incoming calls. Incoming calls may be held for processing by dragging the Caller ID from the “LCD” into the **Holding Calls** section.

- **Quick Contact List** — Displays contacts that have been dragged from the attendant’s *Outlook* Contacts folder. When the *Outlook* Contact is dragged into the Quick Contact List, if more than one number is available, a pop-up window appears, displaying all contact numbers. Highlighting a number selects it as the primary number shown in the Quick Contact List for that contact. The primary number is displayed in the *Number* column of the Quick Contact List. The type of contact phone number is also transferred from *Outlook* into the Quick Contact List’s *Classification* column.



Immediately below the display window, a slide bar is provided for adjusting volume of handset, headset, or speakerphone. Manipulating the slide bar affects the volume of only the function currently in use; other volume levels remain at their previous settings.

Up to 20 function keys are located below the display. The top four keys (**Answer**, **Release**, **Call**, and **Hold**) are fixed. Up to 16 more may be programmed to function as any frequently used features. The attendant defines these buttons by selecting **Tools** and then **Customize VIP Buttons** from the menu bar.

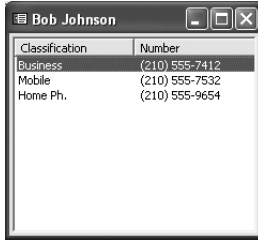
Quick Contact List			
	Name	Number	Classification
	Bob Johnson	(210) 555-7532	Mobile
	Charlie Steinbeck	(910) 555-3231	Business
	CHRIS W	112	Business
	Computer Svcs	(800) 555-6545	Business
	DAVE	118	Business
	DAVID O	113	Business
	George Banks	(817) 555-4656	Home Ph.
	Jennifer Johnson	(214) 555-7879	Business
	RICK L	123	Business
	STEVE H	121	Business

To edit an entry in the Quick Contact List, the attendant right-clicks on the contact to be changed and selects the **Edit** option. This action automatically opens the *Outlook* Contact page associated with that contact. Once all changes have been made, the attendant clicks **Save and Close**.

The tight integration between *VIP PC Attendant Console* and the phone system indicates station status by using multi-colored fonts. Names displayed in black indicate that those station users are idle. **Bold red** indicates a busy status. **Bold amber** is

reserved for those stations that are in DND (do-not-disturb) mode, and ***bold italicized amber*** shows the station user is off-premises.¹

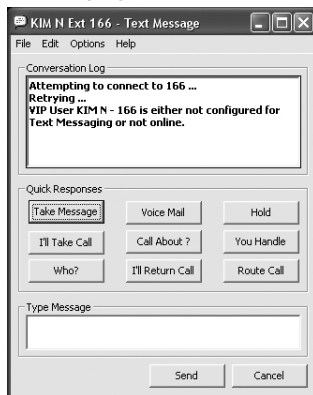
The attendant can call any contact in the Quick Contact List by clicking the “phone” icon, double-clicking the name, or dragging the contact into the Call Display. Double-clicking the name dials the number designated as the primary number, shown in the **Number** column. If one clicks the “phone” icon and more than one choice of phone numbers is available for that contact, a **pick list** of all that contact’s numbers is presented. Clicking any number in the list automatically dials the number.



Alternately, the attendant can send a quick **text message** or e-mail to any entry in the Quick Contact List that displays the “memo” icon. A pick list of available e-mail address choices, imported from *Outlook*, is displayed from which to choose. If the entry is a user of a compatible *VIP* application², the choice of sending a text message is also presented.³ Only those entries that are associated with internal users of these *VIP* applications will display this choice (and the “memo” icon).

To send a text message, the attendant clicks on the “memo” icon, causing a window to pop up. Just as with any instant-messaging system, the name of the person for whom the text message is intended is displayed as confirmation of the correct recipient. The attendant’s cursor is flashing in the message box.

If the *VIP Professional* user doesn’t currently have *VIP* launched, the attendant receives a warning message that the intended person is not on-line with ESI’s text-messaging application:



¹ Requires installation of ESI Presence Management.
² *VIP Professional*, *VIP Softphone*, or *VIP ACD (Supervisor or Agent)*.
³ Refer to the *VIP Setup and User’s Guide* (ESI part #0450-0513) for a more complete explanation.

- **Incoming Calls** — Displays all incoming calls in the order in which they arrive:

Incoming Calls				
Status	Time In Queue	Name	Number	Line
Q	00:11	DOE JOHN	555-555-1111	Line 3
	00:16	BROWN AARON	555-555-1112	Line 2
	00:18	MOORE ALLAN	555-555-1113	Line 1
	00:23	MILLER PLUMBING	555-555-1114	Line 5
	00:15	JONES ROBERT	972-555-1234	Line 16
	00:12	SMITH ALICE	555-555-1121	Line 15
Q	00:21	MCDONALD FRANK	1-803-555-5874	Line 10
	00:51	PHILLIPS NANCY	555-555-1125	Line 18

One of three **status conditions** applies to each incoming call:

- **New incoming calls** are displayed in black font. Once answered by double-clicking anywhere in the call line row, the call is moved from the Incoming Calls area to the attendant’s Call Display for handling: transfer the call, place the caller on hold, or release the CO line. The attendant can answer incoming calls in a FIFO (first-in/first-out) fashion, or may prioritize call handling by specifically choosing a call to answer by double-clicking the call line row.
- The **Attendant Queue** ensures all incoming calls are answered within a preset time threshold, as defined by the customer. A call that remains unanswered beyond that time is automatically routed to the Attendant Queue where a prompt is played, informing the caller of the delay. The call remains visible in the Incoming Calls window, but the font changes to **bold blue** with a “Q” status icon attached.
- During periods of excessive incoming traffic, the attendant may elect to place a ringing call directly into the Attendant Queue by right-clicking the call line row. This eliminates needless ringing for the caller while waiting for the threshold period to expire, immediately routing him to the informative prompt.
- **Rerouted calls** are those that have been previously handled by the attendant and have returned to the console for one of several reasons — e.g., they have been transferred back to the attendant for rerouting, or they dialed **0** while in an automated attendant menu.

These call line rows are presented in **bold black** font, with the familiar “refresh” icon displayed under the Status column. This helps the attendant avoid confusion when answering these types of calls. By being aware that these are rerouted calls, the attendant can greet the caller appropriately.

Call handling

Calls presented to *VIP PC Attendant Console* can be answered in a variety of ways:

- Double-clicking any call line row in the Incoming Calls area. (This is the simplest way.) Using this method, the attendant is able to prioritize which calls to answer first and which can wait, based on Caller ID, time in queue, tenant assignment, recalling callers, or any other criteria established by the customer.
- Clicking the Call Display's **Answer** button. This answers all waiting calls in the order of their arrival to *VIP PC Attendant Console*.
- Dragging a call from the Incoming Calls window and dropping it onto a programmed button of the Virtual Button Window. These buttons can be defined as extensions, departments, mailboxes, or speed-dial numbers. By dropping an unanswered call onto one of these buttons, the call is simultaneously answered and blind-transferred to the selected button. (See "Virtual Button Window," *right column*, for additional details.)

- **Holding Calls** — Held calls are displayed in this section:

Status	Time in Queue	Name	Number	Line
	00:13	ANDERSON JAMES		
	00:21	MARTIN AND CO		
	00:41	JACKSON TOM		

A scrollbar is provided to the right of this screen if more calls are on hold than the section can show. Both system-wide held calls and those placed on exclusive hold by the attendant are shown in this window for easy identification. Held calls, regardless of their origin, are displayed in regular black font. When the system-wide or exclusive hold recall timer expires, the held call's font changes to **bold red**, with a "bell" icon shown under the Status column to ensure the attendant's attention is drawn to this call.

Calls may be taken off hold by double-clicking on any call row. The attendant can prioritize the order in which calls are taken off hold, based on time in the hold queue, the identity of the holding caller, or any other criteria established by the customer.

There are three ways an attendant can place a call on hold:

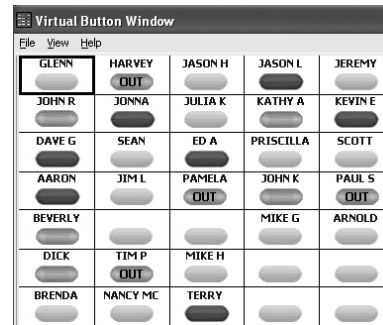
- When speaking to a caller, click the **HOLD** command button in the Call Display. The call leaves the Call Display and appears on hold in normal black font in the Holding Calls area.
- Press the red **HOLD** key on the ESI 48-Key Feature Phone.
- While either a call is ringing or the attendant is speaking to a caller, drag-and-drop the call into the Holding Calls area.

The attendant can place a call on hold to page a user. In case the user doesn't hear (or forgets) the CO line number that was announced, the attendant can see the line number in the Holding Calls area.

The attendant may place a call on hold while waiting for the requested station to become idle. Once the station for which the call is holding is available, the attendant can drag the held call onto the user's DSS button of the Virtual Button Window (*see below*), blind-transferring the call without picking it up.

Virtual Button Window

For increased call-handling efficiency, a separate **Virtual Button Window** is provided. It shows the status of up to 400¹ entries. These buttons provide single-click access to extensions, mailboxes, departments, and speed-dial numbers. The attendant populates this field through simple drag-and-drop programming from drop-down menus. The menus are fully synchronized with the ESI phone system, so every station, mailbox, department and speed-dial number is current.



The Virtual Button Window's oval buttons work the same as do the programmable keys on the 48-Key Feature Phone. Each displayed station button is color-coded to increase easy, at-a-glance recognition of its status²:

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

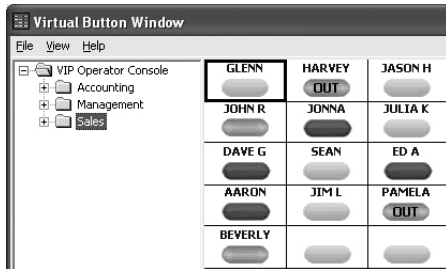
Additionally, in systems with ESI Presence Management installed: when a station is scanned out, the oval icon is **amber** and displays the word **OUT** inside the icon.

The font of the name label associated with each station may also be color-coded. This is often helpful when visually grouping stations into departments or similar job functions. For example, the names of all salespeople might be green, and the service personnel names might be blue. When categorized in this fashion, the attendant can sort by color to view all stations in a specific department.

¹ On the ESI-1000 and ESI-600; quantity is 200 on other *VIP PC Attendant Console*-compatible ESI systems.

² Status won't be displayed for remote stations, departments, or mailboxes connected to a system over an Esi-Link network.

All buttons of the status window may be shown in one large field that can be sized, like any other window, by dragging the corner of the window diagonally. The attendant also can arrange the displayed stations, mailboxes, departments, and speed-dial entries into manageable folders. Clicking a name within a folder dials that extension. Dropping a call onto the name transfers the call.



Using the Virtual Button Window, one can transfer a call by any one of several methods:

- Drag-and-drop the call onto a button.
- After answering the call, click the **Transfer** command button in the Call Display. This presents a list of available extensions (as well as a **Number** field, which allows entry of any external number).

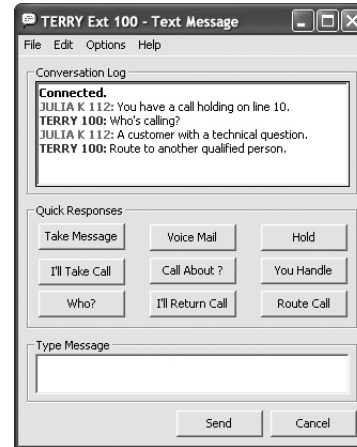
- Press **TRANSFER** on the 48-Key Feature Phone, dial the desired extension number, and hang up.

Each of the latter two methods permits the call to be sent as either a *supervised* or *unsupervised* transfer:

- In the case of a supervised transfer, the attendant clicks the button of the requested station, and waits for a response from the station user before releasing to complete the transfer.
- In the case of an unsupervised transfer, the attendant drags the call from the Incoming Calls area and drops it onto the station button, and then hangs up immediately without waiting for a response.
- The attendant has the ability to transfer an incoming call without first speaking to the caller. An attendant who recognizes the Caller ID information as a call for a specific person can drag the ringing call from the Incoming Calls area of the *VIP PC Attendant Console* window to the Virtual Button Window and drop it onto the extension of the station that the caller likely would have requested.

Text-messaging

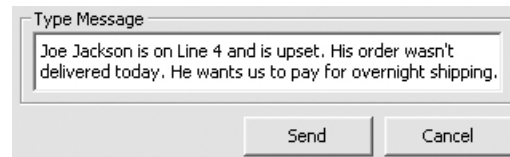
As a unique function of *VIP PC Attendant Console*, the attendant can send a text message to any system user equipped with a client license for any compatible *VIP* application¹. This applies to idle stations, stations in use, and stations in DND mode. Although this feature can be used between all stations using the compatible *VIP* applications, it is an especially powerful tool for busy attendants.



ESI's text messaging is completely non-intrusive. Other systems offer only "voice-over" or whisper-paging to communicate with busy station users. But *VIP PC Attendant Console* lets the attendant send a text message to an idle or busy user to inform him that "A guest is waiting in the lobby," or "You have a call waiting on Line 3." This reduces a business's dependence on overhead paging and background announce, resulting in fewer interruptions for all in the workplace.

Since text messaging is a function of the ESI software, it is a "closed" messaging system, unaffected by external viruses or other security breaches. It also promotes a more productive workplace by limiting messaging to employees engaged in business communication only, thus eliminating the global on-line community.

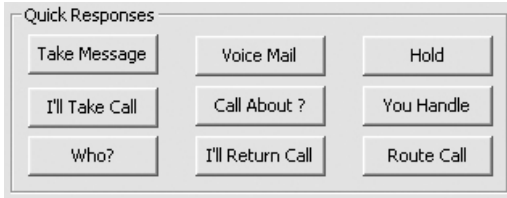
Each text message is individually written, allowing the attendant to include as much description in the message as required:



For example, a message might be sent to inform a busy station user that "Joe Jackson is on Line 4 and is upset. His order wasn't delivered today. He wants us to pay for overnight shipping" — or, simply, the attendant can just send a brief note like "Joe Jackson, Line 4."

¹ *VIP Professional, VIP Softphone, or VIP ACD (Supervisor or Agent).*

The recipient of the text message may respond with a personalized reply, such as “*Tell him I’ll be right with him*”; or, as an alternative, one of 18 user-programmable **Quick Responses** can be selected and sent back to the originator of the text message:



For example, the user may respond by clicking the **Voice Mail** Quick Response, which generates the fixed message, “*Send to voice mail.*” The choice of fixed responses saves the responding user the time required to compose a separate reply to each text message, making it a more efficient means of communication between *VIP PC Attendant Console* and a user.

ESI system capacities

VIP PC Attendant Console can be used with any ESI Communications Server or (legacy) IVX X-Class system — each of which has a built-in NSP (Network Services Processor) installed — or with any (legacy) IVX E-Class Generation II or voice mail-equipped IVX S-Class Generation II system with an installed NSP.¹

The dynamic nature of information flow through the NSP and typical customer attendant requirements define the number of *VIP PC Attendant Console* installations possible on each type of system:

System	Possible installations
ESI-1000	16
ESI-600	8
ESI-200	4
ESI-100	2
ESI-50	2
ESI-50L	2
IVX S-Class Generation II	1
IVX X-Class	4
IVX E-Class Generation II	2

While operating *VIP PC Attendant Console*, the attendant cannot log into an ACD department. This restriction ensures that the attendant can devote full attention to handling the company’s call traffic.

Upgrade and installation notes

ESI hardware requirements

- *VIP PC Attendant Console* is supported by a compatible ESI system (see “ESI software requirements,” below) with an NSP installed. When adding *VIP PC Attendant Console* to an existing system that doesn’t have an NSP, the system must be upgraded (if possible; see next item) to include this component.
 - **IVX S-Class Generation II only:** Be aware that this cabinet is available in two models: with, and without, a pre-installed NSP. An S-Class cabinet without the NSP cannot be upgraded to have an NSP added after-market and, thus, must be exchanged for a cabinet with the built-in NSP.

ESI software requirements

- For IVX S-Class (and legacy IVX E-Class) systems, the ESI operating software and hardware must be Generation II.

Here is the **minimum operating software** for each system type:

System	System software
ESI-1000	[All]
ESI-600	15.1.0 (or higher)
ESI-200	[All]
ESI-100	[All]
ESI-50	[All]
ESI-50L	[All]
IVX S-Class Generation II	4.7.0 (or higher)
IVX X-Class	10.8.0 (or higher)
IVX E-Class Generation II	2.7.0 (or higher)

¹ The NSP came standard on IVX E-Class Generation II systems sold by ESI since February 17, 2006. It may be added to earlier IVX E-Class Generation II systems after-market, and to IVX S-Class Generation II at purchase (see “ESI hardware requirements”).

Computer requirements

Computer operating systems supported

- Windows 2000
- Windows XP®
- Windows Vista®

Note: Any 64-bit version of *Windows* is incompatible with *VIP*.

Microsoft Outlook versions supported

- Outlook 2000
- Outlook 2002
- Outlook 2003
- Outlook 2007

Computer hardware requirements

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

Other notes

- Installation of a *Microsoft Exchange* server is **not** required for operation of *VIP PC Attendant Console*.
- ESI neither has tested whether, nor claims that, *VIP PC Attendant Console* should work alongside synchronization software for PDAs. You must be at a PC, with an ESI 48-Key Feature Phone, to use *VIP PC Attendant Console's* unified messaging and call-control features.
- *VIP PC Attendant Console* is incompatible with the following (*i.e.*, if any licensed *VIP* product and **any** of these are installed on the same PC, the *VIP* application won't run):
 - A Citrix, *Windows Terminal Services*, or other similar environment.
 - LexisNexis *Time Matters*®.
 - Any Grisoft *AVG*™ product.
 - *BitDefender*®.
 - Any CA™ *eTrust*® product.
 - Any *Oncontact*® application.
- Caller ID service from the customer's telephone provider is highly recommended. It is possible to use *VIP PC Attendant Console* without CID service, but many of the product's most compelling features require it.
- No *VIP* application can be used simultaneously with *ESI Personal Programmer*, because they are mutually exclusive applications. (*ESI Personal Programmer* is a downloadable tool available to all end users. *VIP* users don't need to use *ESI Personal Programmer* because its functionality is built into each *VIP* application.)

Notes: For more complete details on the following *VIP* applications, consult the appropriate *Product Overviews*:

- *VIP*, *VIP Professional*, and *VIP Softphone* — *VIP Product Overview* (ESI document #0450-0608).
- *VIP ACD Supervisor* and *VIP ACD Agent* — *VIP ACD Product Overview* (ESI document #0450-0988).

ESI-trained Resellers may download these and any other ESI documents mentioned herein from www.esiresellers.com (password required).

About ESI

ESI (Estech Systems, Inc.) is a privately held corporation based in Plano, Texas. Founded in 1987, ESI specializes in business communications systems. ESI pioneered the all-in-one telephone and voice mail system. The original IVX, introduced in 1996, represented a radical breakthrough in system design: the inclusion of a full suite of features within a single integrated system.

Since its days as a small start-up, ESI has enjoyed exceptional stability and growth while maintaining its dedication to small-company values — including the need to take care of the most important part of the equation: your business.



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