ESI Presence Management User's Guide

Introduction

ESI Presence Management is a suite of technologies and features that enhances an organization's communications mobility, presence of personnel, and management of access control. These features are made available when a compatible ESI phone system is equipped with one or more special-purpose integrated terminals, called **ESI Presence Management RFID**[1] **Readers**.

Your organization may not be using all of the features described in this guide. Contact your System Administrator to find out which features are available to you.

About the ESI Presence Management RFID Reader

The RFID Reader is a wall-mounted device, approximately 5½˝ high by 3½˝ wide. It includes a **CALL** key for **doorphone** operation, and a two-line **backlighted display** that provides informational messages. Its **microphone and speaker** provide hands-free communication. Lastly, the RFID Reader incorporates an **RFID transceiver** for advanced feature operation, as described herein.

Features overview

Basic features

The basic features of ESI Presence Management include hands-free door phone (intercom) operation and remote electric door lock operation, which allows one to unlock a door from anywhere in the office by pressing a programmable feature key on an ESI desktop phone.

Advanced RFID features

If your organization takes advantage of ESI Presence Management's innovative RFID technology, each authorized person will carry a unique **electronic key**. The individual simply waves the electronic key near an RFID Reader, which then "reads" the **tag number** embedded in the electronic key. This can activate one or more of the following features:

- **Presence indication** — In and out status of the individual is automatically indicated on ESI desktop phones' programmable station keys.
- **Personal Call Routing**™ — Automatically activate or deactivate various station features, such as automatically forwarding calls from the office phone to a cell phone.
- **Automatic door lock control** (access control).
- **Time and attendance** — Log time and attendance for automatic timesheet and payroll processing.
- **Door ajar alarm**[2] — Some doors will generate an alarm if the door has been left open for too long.

Electronic keys

If your organization is using ESI Presence Management's advanced RFID features, an electronic key may be issued to you, in the form of either a "key fob" or a credit-card-sized RFID card. A unique RFID tag number is encoded within each electronic key. When you hold an electronic key within four inches of an ESI Presence Management RFID Reader, the RFID Reader will scan the tag number and provide a confirmation tone or optional prompt and an informational message will be displayed on the LCD.

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[1] Radio frequency identification.
[2] Only on IP version (Generations I–II) and digital version (Generation II) of ESI Presence Management RFID Reader. This feature is compatible with only the IP Server 900 and ESI Communications Servers. For more information, contact your ESI Reseller.

ESI Presence Management feature descriptions

Basic features

- **Doorphone** — A call can be initiated to a pre-assigned destination (an extension, department, mailbox, or Esi-Link[1] location) by pressing the **CALL** button on the ESI Presence Management RFID Reader.

- **Manual door-lock control** (remote door unlock) — Where an ESI Presence Management RFID Reader is installed, a call can be made to a station, department, mailbox, or Esi-Link location by pressing the RFID Reader's **CALL** button. When the call is answered, one can use the remote door unlock feature key to unlock the associated door.

> **Notes**: You must be on a call to the doorphone when using the remote door lock control feature.
>
> The "Call" button destination can be different for day and night modes.
>
> Only ESI desktop phones can remotely unlock the door.
>
> If you need to assign a remote door unlock feature key, contact your System Administrator for the programmable feature key code.

RFID features

- **Access control** — Electronic keys can be used to unlock doors equipped with electric door locks.

- **Authentication confirmation** — When an ESI Presence Management RFID Reader scans an electronic key, and the system validates or rejects the electronic key for door control, a message will be displayed and a tone or optional prompt will be heard. Users of valid electronic keys will receive the message *WELCOME* or *GOODBYE*. Those with rejected electronic keys will receive the message *ACCESS DENIED*.

- **DSS and DND key in/out status** — Programmable feature keys assigned as DSS keys will be lit steady amber as a visual indicator when a station user exits the office using an RFID tag. The **DND** key of the station will also be lit amber. Stations set in "Exit" mode will also show *OFF PREMISES* on the second line of the phone display. DSS keys of stations that have DND set will also be lit amber, but with a slow "wink" rate to differentiate from "Exit" mode.

> **Note:** When one exits using an electronic key ("tags out"), the programmable feature keys on the user's phone will un-light. When the user returns ("tags in"), the programmable feature keys on the user's phone will re-light.

- **Personal Call Routing** — (See also "Personal Call Routing," page 3.) Electronic key users with ESI desktop phone extensions can pre-assign one or more of the following features that are applied automatically when the users "tag out":

  – Personal greeting selection (greeting 1, 2, or 3).

  – Forwarding all calls (to a voice mailbox, extension, Esi-Link[1] location, or external number) or sending all calls directly to voice mail.

  – Enabling or disabling voice mail message delivery/notification.

  > **Note:** Electronic key users with guest mailboxes can only select a personal greeting.

- **Quiet time** — For each day of the week, an electronic key user can schedule a "quiet time," a preset period during which the system (a.) automatically turns off message notification and/or call forwarding (if assigned). and (b.) directs to voice mail any calls that would have been forwarded.

- **Door ajar alarm**[2] — Some doors will generate an alarm if the door has been left open for too long. If this alarm is generated by the door, a message will appear in the display of the phones that ring when the **CALL** button is pressed.

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[1] Esi-Link is not available for ESI-50L or IVX S-Class.

[2] Only on IP version (Generations I–II) and digital version (Generation II) of ESI Presence Management RFID Reader. This feature is compatible with only the IP Server 900 and ESI Communications Servers. For more information, contact your ESI Reseller.

About Personal Call Routing

Personal Call Routing automatically redirects your calls when you exit the office using an electronic key with an ESI Presence Management RFID Reader. Assign **entry settings** for call handling when you are in the office, and **exit settings** to handle calls when you are out of the office. You also can set a **quiet time** for each day, a set period during which the system will stop call forwarding/off-premises and message delivery.

When you first wave your electronic key in front of the RFID Reader, you will see the word *GOODBYE* followed by the name assigned to your extension. This means your extension is now in "Exit" mode.

The next time you wave your electronic key in front of the RFID Reader, you will see *WELCOME* followed by the name attached to your extension. This means your extension is in "Entry" mode.

Entry and exit settings: Defaults

Default **entry** settings:

- Currently active personal greeting
- Current message delivery setting

Default **exit** settings:

- Currently active personal greeting
- Calls go to voice mail
- Current message delivery setting

Programming Personal Call Routing

See also the chart, "Personal Call Routing: A quick reference," on page 6.

> **Important:** This programming requires **scroll keys**, so you must use an **ESI desktop phone** (and **not** an ESI Cordless Handset, which lacks scroll keys) to perform this programming.
>
> To program these settings from any ESI desktop phone on your system, go to that phone, press **PROGRAM**[1] ✶ and the extension number, and then **7** to enter Personal Call Routing programming.

Entry settings

> **Notes:** When you tag "in," the system automatically cancels call forwarding (if previously set) and takes your phone out of exit mode.
>
> For more details about using basic ESI phone system features such as personal greetings and message delivery/notification, consult your *User's Guide* or visit *www.esiusers.com*.

1. On your ESI desktop phone, press **PROG/HELP**[1] and then **7**.

2. Press **1** for **entry** settings.

3. Choose which of the three personal greetings you want callers to hear when you enter the office: press **1** for greeting 1, **2** for greeting 2, or **3** for greeting 3.
   Press **#** to confirm.

4. Make a setting for message delivery/notification: **1** for phone-only, **2** for pager-only, or **0** for **no** message delivery.

5. Press **#** to confirm your setting, and then **either** hang up to complete this programming **or** skip to step 2 of "Exit settings" (page 4).

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[1] Or **PROGRAM** on a 48-Key Feature Phone (digital or IP), which has separate **PROGRAM** and **HELP** keys.

Exit settings

> **Note:** Select *Voice Mail* to send all calls to your voice mailbox when you have exited the office.
> Select *Call Forward* to direct calls to another number when you have exited the office.

1. On your ESI desktop phone, press **PROG/HELP**[1] and then **7**.

2. Press **2** for **exit** settings.

3. Use the **scroll keys** (▲ and ▼) to select how you want your calls handled when you're out of the building. Your choices as displayed on the ESI phone are *VOICE MAIL* or *CALL FORWARD*. Press **#** to confirm.

4. What you do next depends on what you selected in step 3.

If you selected *VOICE MAIL*:

a. Choose which of the three personal greetings you want callers to hear when you enter the office: press **1** for greeting 1, **2** for greeting 2, or **3** for greeting 3.
Press **#** to confirm.

b. Make a setting for message delivery/notification: **1** for phone-only, **2** for pager-only, or **0** for **no** message delivery.
Press **#** to confirm your setting, and then hang up to complete this programming.

If you selected *CALL FORWARD*:

a. Use the **scroll keys** (▲ and ▼) to select how you want your calls handled when you're out of the building. Your choices are:

- **Outdial** — Forward to an external number.[2]
- **Extension** — Forward to a station.
- **Mailbox** — Forward to a voice mailbox.
- **Remote** — Forward to a remote Esi-Link location.

Press **#** to confirm.

b. Depending on your choice above, enter the destination to which the system should forward calls — an external number, a station number, a mailbox, or an Esi-Link location.

> **Note:** If forwarding to an outdial (external) number, you must enter an outside line access code before the number. For instance, if you are forwarding calls to 214 555-4532, and you dial **9** for an outside line, you would enter **9 2 1 4 5 5 5 4 5 3 2** for the outdial number.

Press **#** to confirm.

c. Select the personal greeting (1, 2, or 3) to be played to unanswered or rejected calls when you have exited the office. This greeting will be played to callers that were forwarded but weren't answered, or a CO line was not available for the call forward.
Press **#** to confirm your setting, and then **either** hang up to complete this programming **or** skip to step 2 of "Quiet time settings" on the next page.

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[1] Or **PROGRAM** on a 48-Key Feature Phone (digital or IP), which has separate **PROGRAM** and **HELP** keys.
[2] This feature is available only if your Administrator enables it on your station.

Quiet time settings

Quiet time is used to automatically route calls to your voice mailbox at certain times if you've set to have calls forwarded or you are using the *off-premises "reach-me"* feature.

> **Note:** Quiet time settings don't take effect until the **current** time has passed the **next** quiet time setting. For example: if you program a quiet time to begin Wednesdays at 5:30 PM but it's **already** 5:45 PM on Wednesday when this programming occurs, the change won't take effect until the **following** Wednesday.

1. On your ESI desktop phone, press **PROG/HELP**[1] and then **7**.

2. Press **3** for **quiet time** settings.

3. Use the **scroll keys** (▲ and ▼) to select the day of the week.
   Press **#** to confirm.

4. Enter the time at which this day's quiet time should **begin** *("QUIET ON")*, in **12**-hour format. (To **delete** an entry, press **HOLD**.) Press **#** to confirm.
   Then, use the **scroll keys** (▲ and ▼) to select *AM* or *PM*. Press **#** to confirm.

5. Enter the time at which quiet time should **end** *("QUIET OFF")*, in **12**-hour format. (To **delete** an entry, press **HOLD**.) Press **#** to confirm.
   Then, use the **scroll keys** (▲ and ▼) to select *AM* or *PM*. Press **#** to confirm.

> **Example:** Say you want to have calls forwarded to you when you've exited only on weekdays between 7:00 AM and 8:00 PM, and routed directly to voice mail all other times (including weekends). Here's how to make this quiet time setting.
>
> 1. For the day of the week, select *MONDAY*.
> 2. For *QUIET ON*, select *8:00* and then *PM*.
> 3. For *QUIET OFF*, select *7:00* and then *AM*.
> 4. Then, repeat steps 1–3 except that, in each instance of step 1, you select a different day — *TUESDAY* through *FRIDAY*.
> 5. Make sure there are no *QUIET ON* or *QUIET OFF* settings for Saturday and Sunday (for those days, the display should show *"NO QUIET TIME"*).
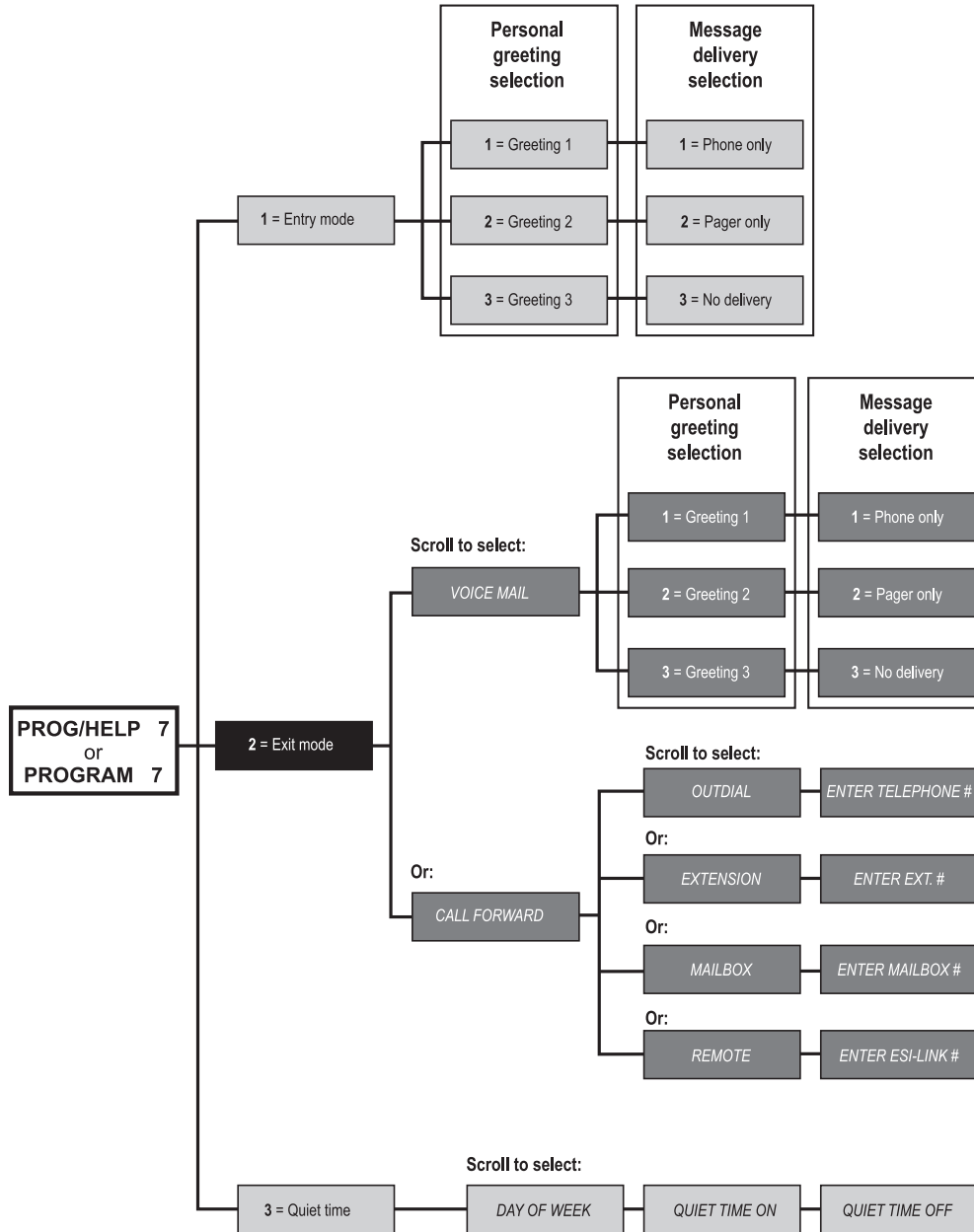>
> If you need to delete any setting, press **HOLD**.

> **Note:** *VIP* also offers access to such programming. For more information about *VIP*, see *www.esi-estech.com/VIP*.

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[1] Or **PROGRAM** on a 48-Key Feature Phone (digital or IP), which has separate **PROGRAM** and **HELP** keys.

Personal Call Routing: A quick reference

This is a visual guide to the choices available to you when you make the ESI Presence Management settings described on pages 3–5.

Personal greeting selection

- **1** = Greeting 1
- **2** = Greeting 2
- **3** = Greeting 3

Message delivery selection

- **1** = Phone only
- **2** = Pager only
- **3** = No delivery

1 = Entry mode

PROG/HELP 7
or
PROGRAM 7

2 = Exit mode

Scroll to select:

VOICE MAIL

Personal greeting selection

- **1** = Greeting 1
- **2** = Greeting 2
- **3** = Greeting 3

Message delivery selection

- **1** = Phone only
- **2** = Pager only
- **3** = No delivery

Or:

CALL FORWARD

Scroll to select:

- OUTDIAL → ENTER TELEPHONE #
- Or: EXTENSION → ENTER EXT. #
- Or: MAILBOX → ENTER MAILBOX #
- Or: REMOTE → ENTER ESI-LINK #

3 = Quiet time

Scroll to select:

DAY OF WEEK | QUIET TIME ON | QUIET TIME OFF

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, which 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.