

ESI Cellular Management

User's Guide

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Rev. D

For on-line help, visit www.esiusers.com.

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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We Make It Easy To Communicate

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Introduction

The cell phone is rapidly becoming the business communications device of choice. ESI is embracing the market with **ESI Cellular Management** — unique hardware and features to bridge the gap between cellular handsets and ESI's line of Feature Phones. The user of a Bluetooth[®]-compatible cellular phone simply walks into his or her office, and the ESI Cellular Management Access Device automatically syncs up with the Bluetooth cellular phone and starts receiving cell phone calls on the user's desktop phone. Outgoing calls are just as easy — one just presses a button on the desktop phone to select the cell phone and either dial the telephone number or use the cell phone's voice dialing¹ feature to complete the call.

Note: Cellular networks don't support sending tone-dialed digits to a cell phone (see "No true tone-dialing," page 10). This means an outside caller on an incoming cell call can't perform functions that require the caller to dial — some examples include dial-on-hold, dialing out of the auto attendant, and accessing an ESI voice mailbox.

About the ESI Cellular Management Access Device

The ESI Cellular Management Access Device (see **Figs. 1–2, below**) is housed in a small, ergonomic plastic case, which connects to a digital phone port. Although the Access Device is intended for desktop placement near the host ESI Feature Phone², it can be attached to any surface by using the included Velcro[®] strips.

The ESI Cellular Management Access Device is powered by the digital port.



Figure 1: Front panel.

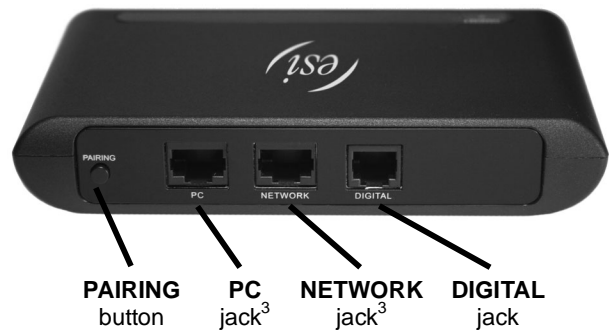


Figure 2: Back panel.

¹ As supported by the cell phone manufacturer and carrier.

² While it is possible to **program** ESI Cellular Management from a 24-Key Feature Phone, the **use** of certain ESI Cellular Management features is possible only through the soft keys under a 48-Key Feature Phone's display.

³ Reserved for possible future use.

Basic features

- **Incoming call destination** — With ESI Cellular Management, incoming cell phone calls can be routed to an ESI voice mailbox (*MB*), extension (*EXT*), or department (also abbreviated *EXT*).¹
- **Ring tone** — You can select a distinctive ring tone to override the station's usual ring tone, clearly identifying calls coming into the ESI phone via the cell phone. To enable this, select one of five available distinctive ring tones.
- **Voice mail routing** — Choose the voice mailbox to which unanswered cellular calls are forwarded: the ESI Communications Server's or the cellular provider's.
- **Cellular Access key** — This key, when programmed on a 48-Key ESI Feature Phone (Digital or IP), offers the same functionality as a line key ("CO line key") along with some additional features. However, since the ESI Cellular Management Access Device is connected to a station port, the Cellular Access key is assigned with the actual extension number of the ESI Cellular Management Access Device. The ESI system translates the extension number to a "virtual" trunk number that is used to retrieve cellular calls that have been placed on system-wide hold.

Note: ESI strongly recommends that a Cellular Access key be assigned on at least one extension. This key provides connection status to the cell phone using unique lamping indications. The lamp status lets the user see immediately whether the Access Device and the cell phone are connected properly. For information on the lamping indications and their meaning, see "Special lamping indications," page 9.

- **Cellular Speed-Dial key** — This key, when programmed on a 48-Key ESI Feature Phone (Digital or IP), allows you to dial a phone number using the cellular phone line.

¹ Reminder: cellular networks don't support sending tone-dialed digits to a cell phone (see "No true tone dialing," page 10).

Quick set-up and use

Programming ESI Cellular Management routing

On your ESI 48-Key¹ Feature Phone (Digital or IP), press **PROGRAM 7** to access user programming menu 7 — **Personal Call Routing™** settings. This will give you a sub-menu offering two choices: ESI Presence Management settings² and ESI Cellular Management. Here is a menu outline showing only the items related to ESI Cellular Management:

Keys pressed	Item
PROGRAM 7	Personal Call Routing settings
PROGRAM 7 2	ESI Cellular Management
PROGRAM 7 2 1	PIN setting
PROGRAM 7 2 2	Voice mail setting
PROGRAM 7 2 3	Cell phone audibles
PROGRAM 7 2 3 1	Ring tone setting
PROGRAM 7 2 3 2	DTMF playback setting
PROGRAM 7 2 4	Shared line setting
PROGRAM 7 2 5	Bluetooth settings
PROGRAM 7 2 5 1	Cell phone pairing
PROGRAM 7 2 5 2	Delete setting
PROGRAM 7 2 5 3	Cell phone line setting
PROGRAM 7 2 5 4	Auto-Connect setting

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. Moreover, the phone must be either a 48-Key Feature Phone (Digital or IP) or a 24-Key Feature Phone, because of the need for at least two lines on the phone display during programming.

To program these settings from any other ESI desktop phone on your system, go to that phone, press **PROGRAM** and the number of the extension you wish to program, and then **7** to enter Personal Call Routing programming.

An explanation of the five types of ESI Cellular Management settings begins on the next page.

¹ While it is possible to **program** ESI Cellular Management from a 24-Key Feature Phone, the **use** of certain ESI Cellular Management features is possible only through the soft keys under a 48-Key Feature Phone's display.

² Not applicable unless ESI Presence Management is installed on your ESI system. For more information concerning ESI Presence Management, consult your ESI Reseller or visit www.esi-estech.com/presence.

PIN setting

The **PIN** (personal identification number) is a security code that you enter into a Bluetooth-enabled cell phone when pairing that cell phone with the ESI Cellular Management Access Device. You may choose any four-digit number from 0000 through 9999. To program the ESI Cellular Management PIN:

1. On your ESI Feature Phone, press **PROGRAM 7 2** to reach the Cellular Management settings.
2. Press **1** to reach the Bluetooth PIN setting.
3. Enter the four-digit PIN used for cell phone verification during handset pairing. Press **#** to confirm.
4. Either (a.) hang up to complete programming or (b.) skip to step 2 of "Voice mail setting" (*next item*).

Voice mail setting

This determines how the ESI system handles unanswered incoming cell phone calls. To program the ESI Cellular Management voice mail setting:

1. On your ESI Feature Phone, press **PROGRAM 7 2** to reach the Cellular Management settings.
2. Press **2** to reach the cell line call-forwarding setting.
3. Using the scroll key, select the destination to which the ESI system will forward unanswered incoming cell phone calls:
 - **CELL V-MAIL** — Handled by cell phone carrier voice mail.
 - **SYSTEM V-MAIL** — Handled by ESI voice mailPress **#** to confirm.

Notes: When this is set to *SYSTEM V-MAIL*, the ESI system answers (*i.e.*, seizes) each incoming cell phone call **immediately**, signaling the cellular carrier to start billing.

When this is set to *CELL V-MAIL*, the ESI system doesn't answer (seize) an incoming cell phone call until an extension retrieves the incoming call. If the call isn't answered by an extension, the system "assumes" the call was routed to, and answered by, the cellular carrier's voice mail system following the carrier's timeout.

4. Either (a.) hang up to complete programming or (b.) skip to step 2 of "Ring tone setting" (*next item*).

Cell phone audibles settings

These settings control two audible features on your ESI Feature Phone to make its use with a cell phone, *via* ESI Cellular Management, more convenient for you.

Ring tone setting

You can choose one of six available distinctive ring tones that you'll hear when your ESI Feature Phone receives an incoming cell phone call. You also can choose not to enable this feature.

1. On your ESI Feature Phone, press **PROGRAM 7 2** to reach the Cellular Management settings.
2. Press **3** to reach the cell phone audibles settings.
3. Press **1** to reach the ring tone setting.
4. Use the scroll keys to select one of the six available distinctive ring tones (or *NORMAL* to disable the feature). Each time you press the scroll key, you will hear the selected distinctive ring tone. When you're satisfied with the selection, press **#** to confirm.
5. Either (a.) hang up to complete programming or (b.) skip to step 3 of "DTMF playback setting" (*next item*).

(Continued)

DTMF playback setting

DTMF¹ playback tones are the sounds you hear when dialing a number on the keypad of your ESI Feature Phone. Some cell phones play DTMF tones when dialed. If **both** the ESI Feature Phone and the cell phone perform playback of DTMF tones, it can sound as if the number dialed is being repeated (“echoed”). If this happens, use this setting to disable DTMF playback. If DTMF playback is **enabled**, the ESI Feature Phone will play DTMF tones whenever a number is dialed. If DTMF playback is **disabled**, the ESI Feature Phone will play no tones when a number is dialed.

1. On your ESI Feature Phone, press **PROGRAM 7 2** to reach the Cellular Management settings.
2. Press **3** to reach the cell phone audibles settings.
3. Press **2** to reach the DTMF playback setting.
4. Use the scroll keys to select whether DTMF playback is *ENABLED* or *DISABLED*. When you're satisfied with the selection, press **#** to confirm.
5. Either (a.) hang up to complete programming or (b.) press **#** again to return to ESI Cellular Management settings.

Shared line setting

The **shared line** setting lets you choose whether other stations in the ESI phone system can assign a Cellular Access key (see “Cellular Access key,” page 7) to select the cell phone for placing outbound calls.

1. On your ESI Feature Phone, press **PROGRAM 7 2** to reach the Cellular Management settings.
2. Press **4** to reach the shared line setting.
3. Use the scroll keys to select whether cell phone line sharing is *ALLOWED* or *DENIED*. When you're satisfied with the selection, press **#** to confirm.
4. Either (a.) hang up to complete programming or (b.) skip to step 2 of “Bluetooth setup settings” (*next item*).

Bluetooth settings

Cell phone pairing (and link deletion)

This pairs a Bluetooth-enabled cell phone with the ESI Cellular Management Access Device.

1. On your ESI Feature Phone, press **PROGRAM 7 2** to reach the Cellular Management settings.
2. Press **5** to reach the Bluetooth setup settings.
3. Press **1** to create a new Bluetooth link to a cell phone **or** press **2** to delete a previously established link.
4. Press **#** to confirm.
5. Either (a.) hang up to complete programming or (b.) skip to step 3 of “Cell phone line setting” (*next item*).

Cell phone line name setting

This displays the Bluetooth link connection information — *i.e.*, the cell phone line name.

1. On your ESI Feature Phone, press **PROGRAM 7 2** to reach the Cellular Management settings.
2. Press **5** to reach the Bluetooth setup settings.
3. Press **3** to view the cell phone line name.
4. Press **#** to confirm.
5. Either (a.) hang up to complete programming or (b.) skip to step 3 of “Auto-Connect setting” (*next item*).

(Continued)

¹ Dual-tone/multi-frequency.

Auto-Connect setting

The **Auto-Connect** setting lets you choose when and how the Bluetooth connection is made with the cell phone.

If Auto-Connect is **enabled**, the Bluetooth link between the cell phone and the ESI Cellular Management Access Device will be automatically re-established every time the cell phone is in close proximity to the Access Device. If AutoConnect is **disabled**, the Bluetooth link must be manually re-established each time by either using the Cellular Access key (see "Cellular Access key," *below*) or selecting the cell phone's Bluetooth settings or option.

1. On your ESI Feature Phone, press **PROGRAM 7 2** to reach the Cellular Management settings.
2. Press **5** to reach the Bluetooth setup settings.
3. Press **4** to reach the Auto-Connect setting.
4. Use the scroll keys to select whether Auto-Connect is *ENABLED* or *DISABLED*.
When you're satisfied with the selection, press **#** to confirm.
5. Press **#** to confirm.
6. Hang up to complete programming.

Setting up a Cellular Access key

Programming a Cellular Access key

To program a Cellular Access key on an ESI Feature Phone:

1. Press **PROGRAM 2** to enter programmable feature key programming.
2. Press the selected programmable feature key.
3. Enter the extension number of the ESI Cellular Management Access Device.
4. Press the selected programmable feature key again to complete programming the key.
5. Press **RELEASE** to exit programming.

Using a Cellular Access key

To place an outgoing call:

1. Press the Cellular Access key.
2. Dial the desired phone number.

Notes: If the cell phone isn't available (roaming, out of range, etc.), the Cellular Access key glows amber.

If the user presses the key and the cell phone **is** available, the system will try to re-establish a connection with the cell phone.

Using the Cellular Access key with Auto-Connect disabled

1. Make sure the Cellular Access key is **glowing steadily amber**.
2. Press and release the Cellular Access key.
3. The ESI phone's display will show "CONNECTING."
When the Access Device has successfully connected with a Bluetooth-enabled cell phone, the ESI phone's display will return to normal, and the Cellular Access key will cease glowing.

Answering incoming calls

You answer a call that comes in via ESI Cellular Management as you would any usual call: either pick up the ESI Feature Phone handset, press **SPEAKER** on the ringing phone, or (if using a headset) press a programmed headset key.

Using voice dialing to place an outgoing call

If your cellular service provides **voice dialing**, ESI Cellular Management lets you use your ESI Feature Phone, too, to make calls in this fashion.

1. Lift the ESI phone's handset (or press **SPEAKER**).
2. Press the Cellular Access key.
3. Press the **VOICE DIAL** soft key that appears in the ESI phone display.
4. As you would when using your cell phone, say the appropriate word(s) to dial the desired number.

Using the Cellular Access key to check cellular voice mail

To access your cellular service voice mailbox:

1. Press the Cellular Access key on your ESI Feature Phone.
2. Dial the cell phone's number.
3. When you hear the cellular voice mailbox's personal greeting, follow your cellular service provider's normal steps for remotely checking voice mail.

Leaving the area with cell phone call and Auto-Connect enabled

When Auto-Connect is enabled, use the following procedure if you must take the cell phone out of the range of the Access Device **but** are on a call on the cell phone at the time and don't wish to hang up at that time:

1. While on an active cell phone call, press the **USE CELL** soft key that appears in the ESI phone display. Auto-Connect is now disabled for 10 minutes. The Access Device's blue **HANDSET** LED will begin blinking, and the phone's Cellular Access key will glow (not blink) amber.
2. On the cell phone, resume the conversation.¹
3. To end the call, hang up normally using the cell phone. After 10 minutes, Auto-Connect is re-enabled. **At that time . . .**
 - If there is **no** active call on the cell phone but it is in range, the Access Device will re-establish the Bluetooth link to the cell phone.
 - However, if there **is** an active call on the cell phone **and** it is in range, the call will be disconnected.

Note: While Auto-Connect is disabled, the Cellular Access key will continue to glow (not blink) amber. To re-establish the Bluetooth connection, press the Cellular Access key.

Using the Cellular Speed-Dial key

Press the Cellular Speed-Dial key to dial out using the cellular phone line. To program this key on a 48-Key Feature Phone (Digital or IP):

1. Enter feature key programming by selecting a programmable feature key to program and **either . . .**
 - Pressing **PROGRAM 2** and then pressing the programmable feature key.
. . . or . . .
 - Holding down the programmable feature key.
2. Press **ESI-DEX**. The display will show:



ESI - DEX
PER STA SYS LOC KEYS

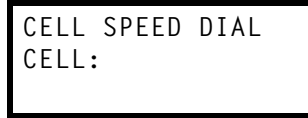
(Continued)

¹ On some cell phones, you can actively switch the phone's audio source during a call. For more information about this, refer to the cell phone's *User's Guide*.

3. Under the display, press *KEYS*, and then press the left-side scroll key (▼). The display will show:



4. Under the display, press *STOR*. The display will show the associated ESI Cellular Management Access Device or you can scroll to see a list of the system's installed Access Devices with a Share Line setting of "YES":



5. Using the scroll keys, select the Access Device you wish to use for dialing the cellular speed-dial number, and press the programmable feature key once again. The display will show:



6. Use the dialpad to enter the desired phone number (**without** a line access code of **9, 8, or 71-76**), and press the programmable feature key once more to complete programming. To insert special characters (*P, F, #, and **)¹, use the right-side scroll key (▲) to enter them. To move back during this entry, use the left-side scroll key (▼).

Special lamping indications

Cellular Access key

A programmed Cellular Access key provides additional **lamping** indication to show the status of the ESI Cellular Management Access Device's connection *via* Bluetooth to the cell phone.

Blinking amber — Not paired to a cell phone.

- A cell phone must be paired to the ESI Cellular Management Access Device.
- This indication normally appears before the cell phone is paired to the Access Device.

On (glowing amber) — Paired, but not connected to a cell phone.

The following conditions can cause this indication:

- The cell phone is out of range of the ESI Cellular Management Access Device.
- The cell phone is already connected *via* Bluetooth to another device (e.g., a Bluetooth headset).
- The cell phone's Bluetooth connectivity has been turned off.
- The cell phone is powered off.

Off — Paired and connected to a cell phone.

HANDSET LED on Access Device

The **HANDSET LED** on the ESI Cellular Management Access Device provides the following indications:

- **Off** — Unpaired with a cellular phone.
- **Blinking slowly** — Not connected (Auto-Connect disabled).
- **Blinking moderately** — Searching for cell phone (not connected).
- **Blinking rapidly** — In pairing mode.
- **On** — Cell phone is paired and connected.

¹ If necessary, consult your ESI Feature Phone *User's Guide* (or visit www.esiusers.com) to learn more about using special characters when dialing.

Cautions

In general

Bluetooth is an industrial specification for low-powered, short-range wireless networking. It provides a way to connect and exchange information between devices. Bluetooth is used not only in cellular phones but also personal computers, as well as other devices such as video game consoles. It uses a secure, globally unlicensed, short-range radio frequency.

Bluetooth compatibility

Not all Bluetooth-enabled cell phones are alike, because different cell phone manufacturers implement Bluetooth slightly differently. Not all cell phones support all capabilities (*e.g.*, voice mail). Cell phones manufactured prior to 2006 are more likely to have Bluetooth compatibility issues. To minimize such issues, a cell phone should comply with the Bluetooth 1.2 (or higher) specification and offer **both** headset and hands-free “profiles.”:

Still, even then, there can be difficulty making Bluetooth devices interact with each other. In particular, a Bluetooth-enabled cell phone may:

- Fail to pair with the ESI Cellular Management Access Device.
- Always prompt you to pair it with the Access Device, even when this has already occurred.
- Always prompt you to connect to the Access Device, even though the phone has an “Always connect” setting.
- Turn off its Bluetooth capability by itself, due to either its power-saving settings or interference from other devices.
- Suffer noisy or bad connections with calls. This can occur for a variety of reasons. The cell phone may be too far from the Access Device, or it may encounter interference from other Bluetooth devices (or even other objects such as walls, appliances, and cordless phones).

Remember: Bluetooth is LOW-powered, SHORT-range

If a cellular call is in progress, and the cell phone is moved more than 30 feet away from the ESI Cellular Management Access Device and/or encounters interference, audio quality will degrade and the connection can drop between the cell phone and the Access Device. If either of these occurs, move the cell phone closer to the Access Device.

Incoming cellular calls

The clock is running

Your cellular plan minutes **will** be used if incoming cellular calls are **either** (a.) answered by the ESI Communications Server's voice mail **or** (b.) directed to an ACD department and placed in ACD queue.¹ Why? Because the cellular carrier starts timing the call as soon as it's connected — *i.e.*, answered. And, of course, both outgoing and incoming calls consume cellular plan minutes.

No true tone-dialing

One characteristic of incoming cell calls is that they don't carry DTMF (commonly known as *TouchTones*[®]). The tones you hear when pressing a cell phone's keys are mere simulations intended to make the dialing process more familiar to you; they **don't** go over cell phone networks, which aren't designed to repeat dialed digits but, instead, handle dialed calls in other ways. In fact, cellular networks' audio compression distorts such tones, making them useless even if they could somehow be transmitted. As a result of this characteristic, incoming cell phone callers **cannot**:

- Dial menu selections from the ESI system's auto attendant, such as “To reach Accounting, press **2**.”
- Dial out of a voice mailbox, or off a message-on-hold.
- Use “dial-by-name.”
- Access the ESI system's AutoPage or off-premises “reach-me” features.

¹ Not applicable to the ESI-50L doesn't support ACD.

Enabling Auto-Connect

If the **Auto-Connect** option is enabled, be aware that:

- You can't "pull" a cell call from the system back to the cell phone handset. Instead, use the *USE CELL* soft key you'll see on the ESI Feature Phone display.
- You can't answer an incoming cellular call using the cell phone handset (but must, instead, answer it using the ESI Feature Phone).
- If you're on a cellular handset call as you near your office, the call **may** be switched automatically to the ESI Cellular Management Access Device.

If either of these are attempted, the call will be switched from the cell phone handset to the Access Device. To the person on the other end, it will seem as if the call had been disconnected. If this happens, move the cell phone away from the Access Device, so the call will automatically reconnect to the cell phone handset.

To **prevent** this from occurring, do one of the following:

- Complete the call **before** you enter your work area (*i.e.*, where the Access Device is).
- Change the cell phone's Bluetooth access settings to "Always ask" to connect.
- When away from the office, use a Bluetooth headset with the cell phone (but turn off the headset when in the office).
- Disable Auto-Connect.

Using the Cellular Access programmable feature key

Don't use the Cellular Access programmable feature key if you're already on a call using the cell phone handset. If you do this when the cell phone is in range of the Access Device, it will disconnect the call.

Outgoing cellular calls

Important: If your cell phone has a key lock feature, make sure the keys are unlocked (or, if it's a "clamshell"-type cell phone, keep it open); many cell phones won't make outgoing calls if their keys are locked.

Using the Voice Dial soft key

Use your ESI phone's **Voice Dial** soft key **only** if your cell phone supports voice commands.

If your cell phone lacks this support and you press the **Voice Dial** key, the system will automatically "cut through" to the cell phone, and digits dialed will be ignored. If this happens:

1. Hang up the ESI phone (either place its handset back on the cradle or press **RELEASE**).
2. Press the Cellular Access key.
3. Dial the desired number.

ESI Cellular Management voice mail settings

ESI Cellular Management voice mail settings are overridden if ESI Cellular Management cell call routing is set to any of the following:

- Voice mail or an ACD¹ department.
- An extension which is call-forwarded to voice mail or an ACD¹ department.
- A ring-all, in-order, or UCD department (this one applies only if (a.) the department call forwarding is set to an auto attendant branch, voice mail, or an ACD¹ department **and** (b.) all department members are either busy or in do-not-disturb [DND] mode).

¹ The ESI-50L doesn't support ACD.

Addendum: Administrator programming

To program an ESI Cellular Management Access Device using System Administrator privileges:

1. Press **PROGRAM** * and then the extension number of the Access Device.
The ESI system will prompt for a password.
2. Enter the correct Administrator password.

Note: This must be provided by your installing Certified ESI Reseller. Because this password allows administration of many ESI system parameters, **only** authorized individuals should receive and use it.

3. To change the name of the selected extension, press **1** — **or**, to confirm, press **#**.
4. To program where the cell phone line is to be answered, press **2**.
To select a station, department, or branch ID, press a scroll key and enter the new value.
To confirm, press **#**.
5. Either (a.) hang up to complete programming or (b.) skip to step 2 of "PIN setting" (page 5).

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