# ESI eSIP Evolution Series
## Extension User's Guide

This Extension User Guide explains all eSIP Evolution Series management menus available for Extension users. ESI's eSIP Evolution Series of IP PBX's provides Extension user accounts, which allow the Extension users to log in to an eSIP Evolution Series IP PBX using their own extension account. All the users can check their own voicemail, recordings and configure the Extension Settings after logging in to an eSIP Evolution Series IP PBX.

**Note:** This guide only describes the default settings available for Extension users. If the Administrator grants more user permissions for the Extension, please refer to the ESI eSIP Evolution Series Administrator Guide for more information



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# Contents

# Extension User Portal

To log into the Extension User Portal, navigate to the ESI eSIP Evolution Series IP PBX URL. Default IP Address: https://192.64.95.86:59088/ *(check with your System Administrator if this IP address does not work. It may have been changed).*

Log in with your ESI eSIP Evolution Series IP PBX Extension number and the password assigned by your system Administrator. The default password is "Pass" + "Extension number". (i.e. Pass2019).



**Note:** If you cannot log in to the ESI eSIP Evolution Series IP PBX with your Extension number, please contact the Administrator to check your Username and Password.

# Getting To Know Your Desktop

When you log in to the Extension User Web GUI, you will see the desktop. From here, you can do many things, such as manage your extension settings and check voicemail messages, CDR and recordings.

1. Click on the person icon in the upper right corner. It will display your User Extension Number, let you change the language, and enable you to log out of the GUI. (See screen capture).
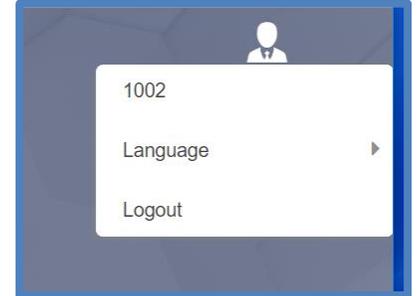
Different User Permissions are defined by your System Administrator. Your assigned User Permissions will dictate what applications and options are available to you.  This Extension Guide covers default settings only.

2. Click the [icon] icon in the upper left corner. It will open a window with the available applications for your use within the GUI. Remember, you may not see them all if your User Permissions do not allow them.

3. Right-click an icon associated with an application and it will enable you to add it to your desktop. (To remove it from your desktop, right click the application icon).
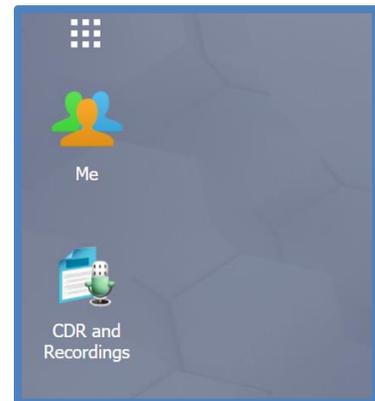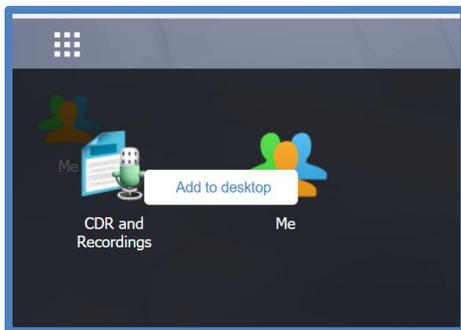
# The "Me" Icon

On your Desktop, clicking on the "Me" icon (  ) allows you to configure your Extension settings and check Voicemail box.

## *Extension Settings*

**User Information**
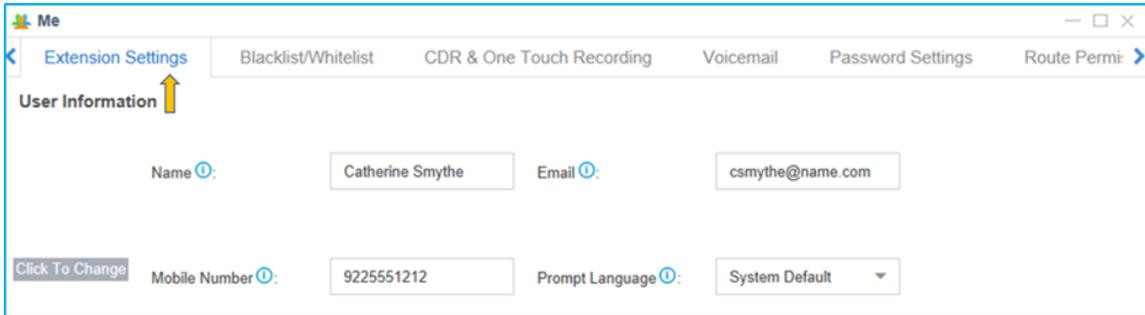


- **Caller ID Name:** Enter your name.
- **Email:** Enter your email address. Your email will be used to recover your password, receive forwarding voicemails, receive fax as an attachment and receive event notifications.
- **Mobile Number:** Enter your phone number. Your phone number can receive forwarded calls and event notifications.
- **Prompt Language:** Choose the prompt language. It will default to the System Default.

**Voicemail**
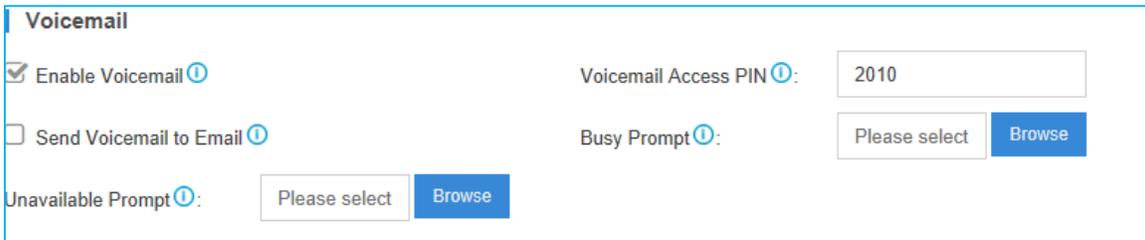


- **Enable Voicemail:** Check the box to enable the voicemail feature.
- **Voicemail Access PIN:** The password to enter the voicemail system.
- **Send Voicemail to Email:** Check the box to send voicemails to your email address.
- **Busy Prompt:** Select the greeting that will be played when the Extension is busy.
- **Unavailable Prompt:** Select the greeting that will be played when the Extension is unavailable.

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**Call Forwarding**



- **Always:** Always redirect the call to the designated destination.
- **No Answer:** Redirect the call to the designated destination when it is not answered.
- **When Busy:** Redirect the call when the Extension is busy.

Calls can be forwarded to the following:
- o **Voicemail**: Redirect the caller to voicemail
- o **Extension**: Redirect the caller to another extension.
- o **Mobile Number**: Redirect the caller to a mobile number contained in User Information.
- o **Queue**: Redirect caller to a Queue to be answered by the next available representative.
- o **Ring Group**: Redirect caller to a ring group to be answered by someone in a department.
- o **IVR**: Rediret caller to an IVR that might provide additional options, as an example.
- o **Custom Number**: Enter number manually and redirect caller to this number.
- o **Hang Up**: Hang up the call.
- o **Busy Camp-on**: Receive an automatic call back or set the extension to transfer.
  Disable phone's regular call waiting if needed, so user will not have to reject a second incoming call.  To do this go to **Auto Provisioning** > **Device List** > Select the extension number to edit > **Features** and uncheck Call Waiting.

**Mobility Extension**



- **Ring Simultaneously:** When the Extension has an incoming call, it rings the mobile number simultaneously.
- **Mobility Extension:** To make the system ring your mobile phone, a prefix matching the outbound route also needs to be entered.
- **Enable Mobility Extension:** If you enable this setting, when you call into the system with your mobile phone, the phone will have the same user permission with the desktop Extension. So, your mobile phone will be able to reach the other Extension, dial out with the trunk, and play voicemail.

**Other Settings**



- **Ring Timeout:** Customize the timeout in seconds. Phone will stop ringing over the time defined.
- **DND/Do Not Disturb:** When DND is enabled for the Extension, the Extension will be unavailable.
- **Send Email Notification:** When extension user password is changed.

## Blacklist/Whitelist

On your Desktop, click on the "Me" icon (  ) to configure your Blacklist and/or Whitelist.
The Blacklist is used to block incoming and/outgoing calls. If the number of an incoming or outgoing call is listed in the number blacklist, the caller will hear the following prompt: *"The number you have dialed is not in service. Please check the number and try again".* The system will then disconnect the call. The Whitelist is used to allow incoming and/or outgoing numbers.
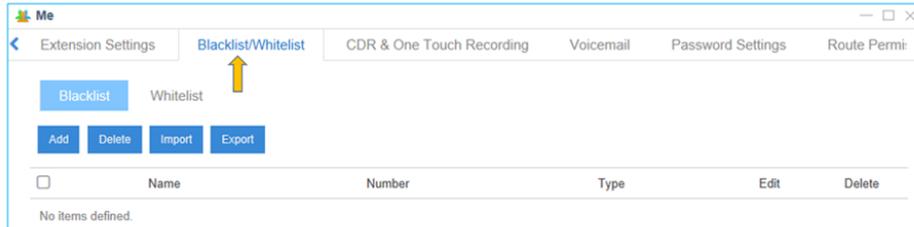


The system supports the option to block or allow three types of numbers:

- **Inbound:** The number would be disallowed or allowed to call in to the system.
- **Outbound:** Users are disallowed or allowed to call the number out from the system.
- **Both:** Both inbound and outbound calls are disallowed or allowed for a number.

**Add Blacklist/Whitelist**

Select either the Blacklist or Whitelist tag and click **Add** to add a number to the list.





- **Name:** Give a name for the blacklist/whitelist.
- **Number:** Enter the numbers. You can enter multiple numbers; one number per row.
- **Type:** Choose the type; Inbound, Outbound or Both.
- **Save/Cancel:** Click Save to save your changes or Cancel to cancel your changes.

**Delete a Number**

Check the box next to the number(s) to delete and click **Delete** .

**Export Blacklist/Whitelist**

Click [Export]
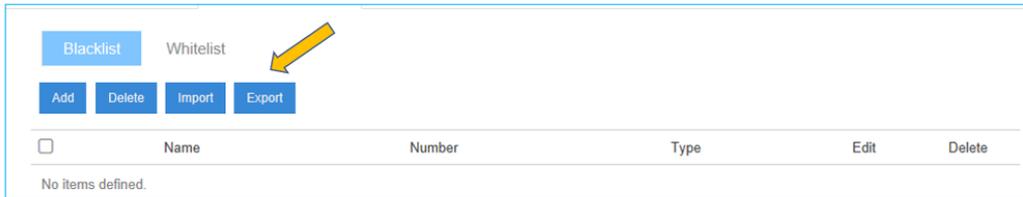


You will see a dialog box that shows all the Blacklist/Whitelist files you created (see example below). Click on the box next to the file you want to export. You can only export one file at a time. The file will export as a .csv file to a location you choose on your PC.
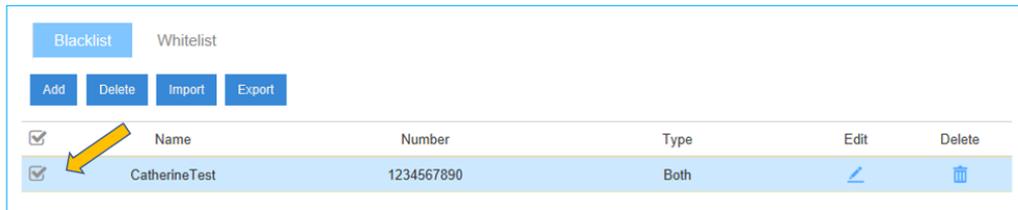


**Import Blacklist/Whitelist**

Click [Import]
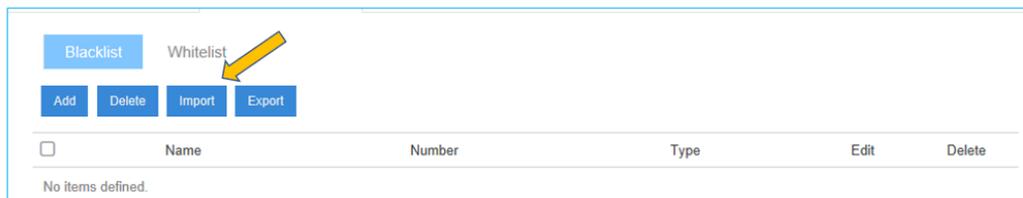


You will see the dialog box below.
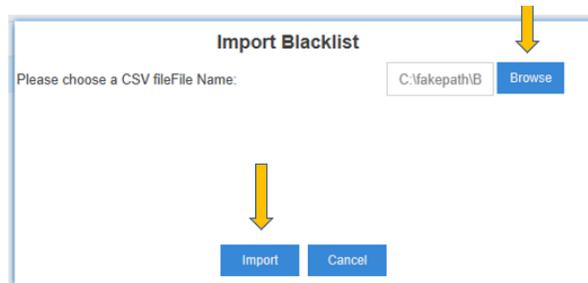


Click [Browse] to select the file (must be a .csv file). Then click [Import] to upload.

## 1.2.3 CDR & One Touch Recording

On your Desktop, click on the "Me" icon (  ) to configure your CDR & One Touch Recording.
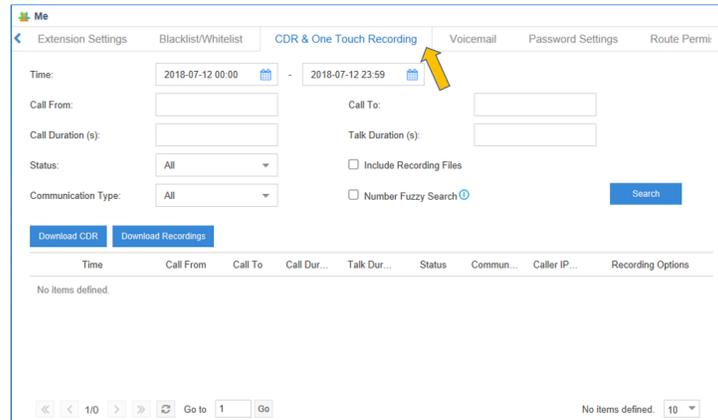


Here you can check call logs and recordings. You can run reports against the logs and filter the information on the following:

- Time
- Call From
- Call To
- Call Duration
- Talk Duration
- Status
- Include Recording Files
- Communication Type
- Number Fuzzy Search



You can perform the following operations on the filtered call report:

- Download Searched Result

Click [Download CDR] to download the searched records.

- Download Recording File
- Click [Download Recordings] to play the recording file.
  **Note:** by default, the Extension user has no permission to check the recording files.

## Voicemail

On your Desktop, click on the "Me" icon (  ) to configure your voicemail messages.
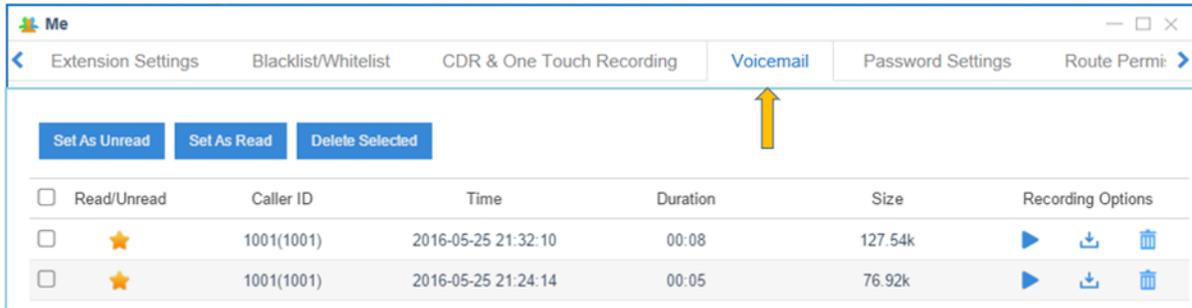


Voicemail Message Status

⭐ : Unread

☆ : Read

Manage the Voicemail Messages:

- Click ▶ to play the message.
- Click ⬇ to download the message file.
- Click 🗑 to delete the message.
- Click ⭐ or ☆ to switch the message status between Read and Unread.

## 1.2.5 Password Settings

On your Desktop, click on the "Me" icon (  ) to change the Extension login password.
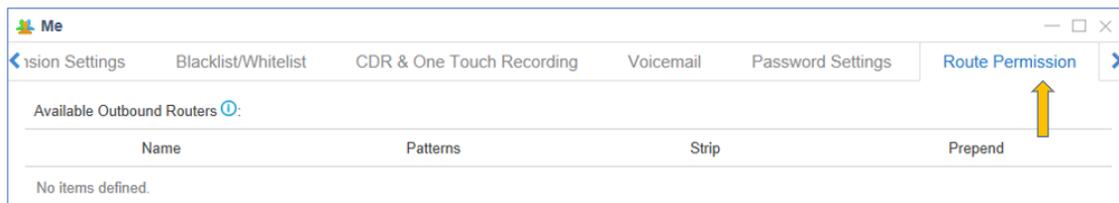


First, type the old password. Then type the password twice to confirm.

*Route Permission*

On your Desktop, click on the "Me" icon (  ) to see the available outbound routes that can be used by this extension.
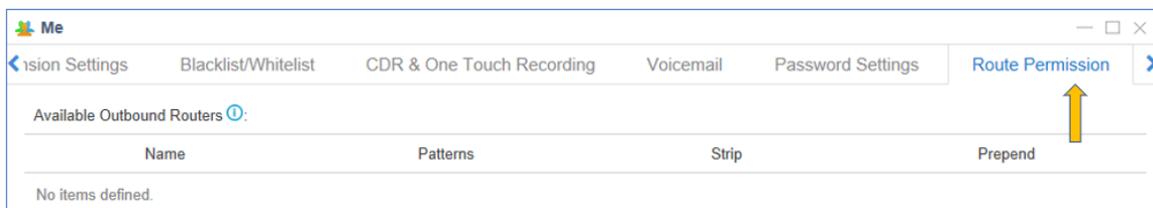


- The Name column identifies the trunk(s) available, if any.
- Outbound calls that match entries in the Patterns column will use that outbound route.
  - The following characters have special meanings:
    - X matches the numbers 0-9.
    - Z matches the numbers 1-9.
    - N matches the numbers 2-9.
    - [12345-9] matches the numbers in the brackets (in this example, 1, 2, 3, 4, 5, 6, 7, 8, 9).
    - Wildcard "." matches anything remaining. E.g. "9011." matches anything starting with 9011 (excluding 9011 itself).
    - Wildcard "!" causes the matching process to complete as soon as it can unambiguously determine that no other matches are possible.
- The Strip column specifies the number of digits that will be stripped from the front of the dialed number before the call is placed.  For example, if you must press 9 before dialing out, one digit will need to be stripped from the dial string before the call is placed through the carrier.
- The Prepend Column specifies digits that will be prepended to the dialed number before the call is placed.  For example, if a trunk requires 10-digit dialing, but users would prefer to use 7-digit dialing, the 3-digit area code can be prepended to all 7-digit phone numbers before the call is placed through the carrier.
  - When using analog trunks, a "w" character indicates a slight delay before dialing the rest of the string on that trunk.
  - If there are no entries on this page, this Extension does not have the ability to dial out.

# Basic Calling

*Making Internal Calls*

To make internal calls, pick up the phone and dial the other Extension's number. For example, to reach Extension 2019, dial 2019.

*Making Outbound Calls*

To place an outbound call, dial the number assigned by the Administrator to access outbound routes. Please contact the Administrator for details.

*Answering Calls*

To answer an incoming call, pick up the phone.

# Call Transfer

There are 2 types of call transfer available: Blind Transfer and Attended Transfer. Users can activate call transfer by dialing the feature code during the call.

- Blind Transfer
  Default feature code: *03
  - o Dial "*03" during the call;
  - o Dial the number of the extension you want to transfer the call to after hearing a prompt "transfer";
  - o The call will be transferred after the number is dialed.
  - o Hang up.
- Attended Transfer
  Default feature code: *3
  - o Dial "*3" during the call;
  - o Dial the number of the extension you want to transfer the call to after hearing a prompt "transfer";
  - o Talk to the person to whom you are transferring the call.
  - o Hang up. The call will be transferred after hanging up.

# Call Pick-up

Call Pickup is a feature that allows someone to answer another person's ringing phone. The feature is accessed by dialing call pickup feature code.

- **Group Call Pick-up:** The default feature access code for Group Call Pickup is *4. Press * 4 and the extension nuber of the phone which is in the same group as you are.
- **Direct Call Pick-up:** The default Direct Call Pickup (Extension Pickup feature code is *04). Dial *04 and the Extension number to pick up the call.

# Call Monitor

**Extensive:** All the following three modes will be available to use.
- **Listen:** You can listen to the call but cannot talk (default feature code: *90).
- **Whisper:** You can talk to the Extension you're monitoring without being heard by the other party (default feature code: *91).
- **Barge-in:** You can talk to both parties (default feature code: *92).

To Call Monitor, you need to ensure that the target Extension you want to monitor is set up to be monitored. The Administrator should also select one Call Monitor mode for you. For example, if you have the permission to do "Listen" monitor and Extension 2019 is set up to be monitored, dial *902019 to monitor their calls.

# Advanced Calling Features

- **Intercom:** To make an announcement to a specific Extension, dial *5 and the Extension number you want to call. For example, to make an announcement to Extension 2019, dial *52019.

- **Call Parking:** To put a call on hold and continue the conversation from another phone, dial *6 during the call, and the system will prompt that the call is parked at the Parking Extension Range (6900-6999).

Then you can resume the conversion on another phone by dialing the *6 and the appropriate Parking Extension Range number.

You can also do Directed Call Parking with feature code *06. For example, dial * 06 and the appropriate Parking Extension Range during an active call, and then resume the conversation on another phone by dialing the appropriate Parking Extension Range number.

- **One Touch Recording:** Dial *1 during the call to make one-touch record.

## *Virtual answer*

When a user is busy and a second call comes in, Virtual Answer allows them to dial a feature code, then the second caller will hear the user's personal message.

From the user's virtual answer greeting, caller may press '**0**, **1 or2**' to leave a voicemail message, continue holding or an option to be forwarded to a predetermined extension. Remember that too many choices in a virtual answer greeting may confuse callers, so try to keep the greeting simple. The following is an example greeting:

"Hi, this is Chris. I'm on the phone, but I saw your call come in and I want to speak with you, so I have placed you on hold for a moment. If you just want to leave me a voicemail message, you may press '1' at any time, or please stay on line and I'll be right with you. Thanks".

**Admin:**
1. Log into eSIP Server and Go to **Settings** > **PBX** > **General** > **Feature Code**.
2. Check **Virtual Answer** Feature Code.
3. By default this code is **#60**.
4. Click on the "Set Extension Permission" link
5. Choose the exts that will have this feature.
6. Click **Save**.

Only eSIP 500x and Titan have a limitation of users who can use Virtual Answer features.
eSIP 500x: max users, 180.
Titan: max users, 900.
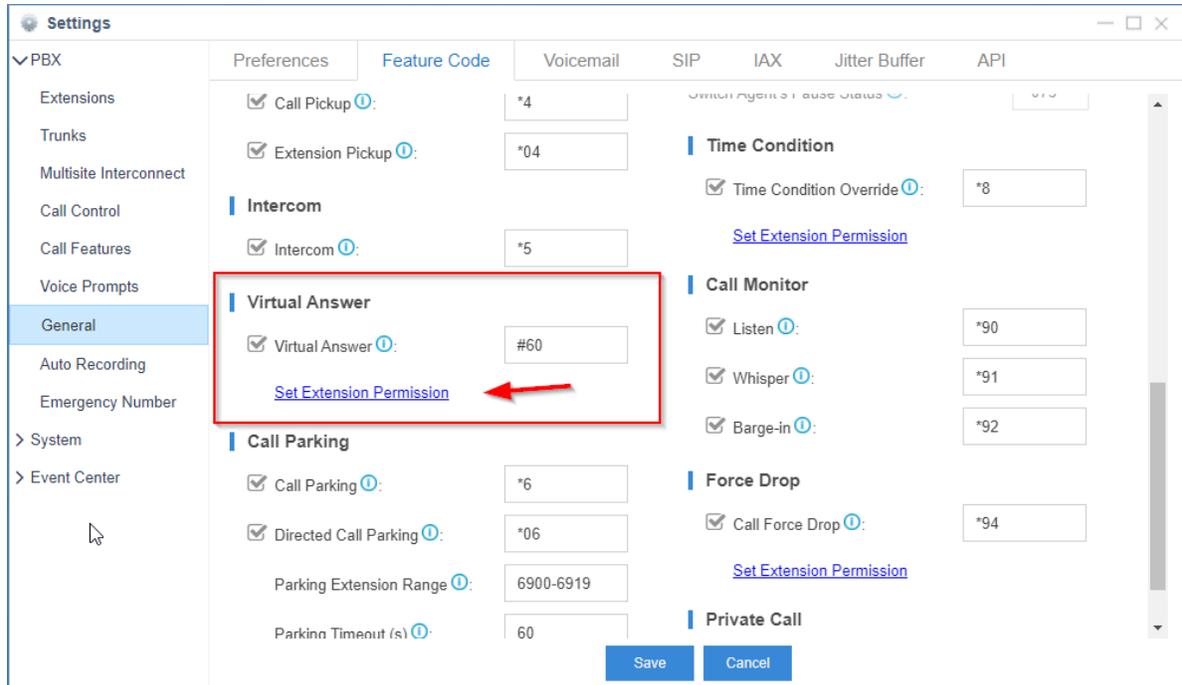


On eSIP 500x, Titan, it would show this as the max extensions that can use Virtual Answer:
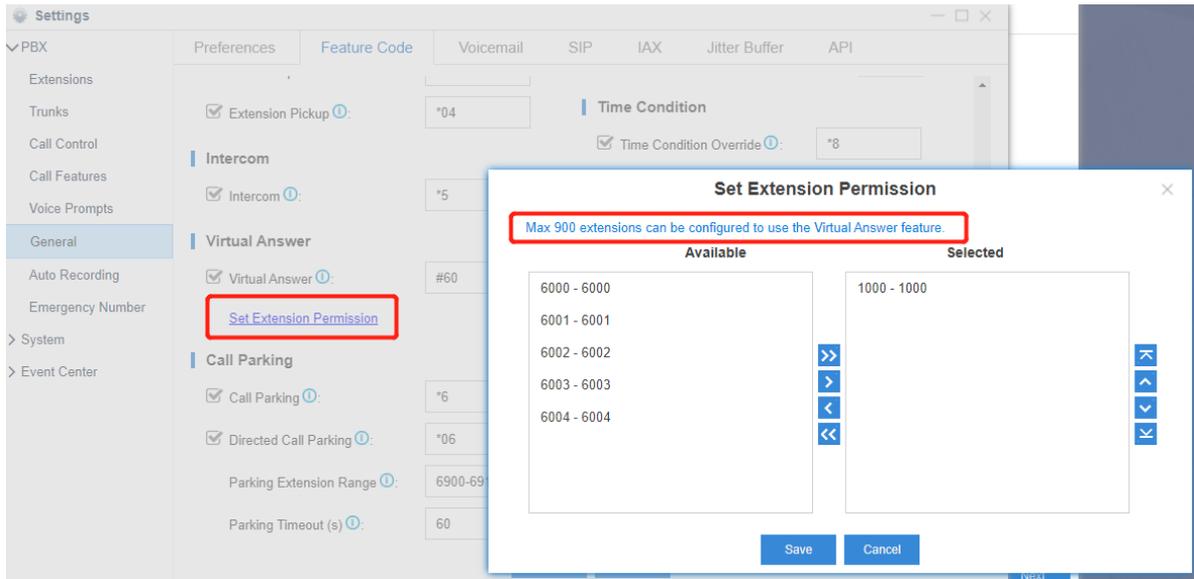
**Set up user's virtual Answer:**
Maximum one recording file for virtual Answer for each user.
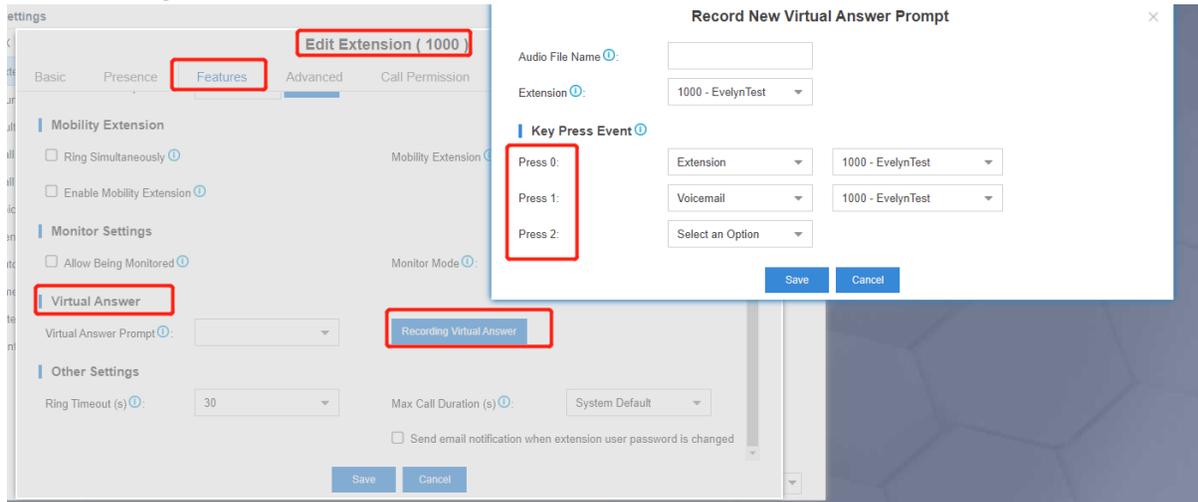


or upload a file:
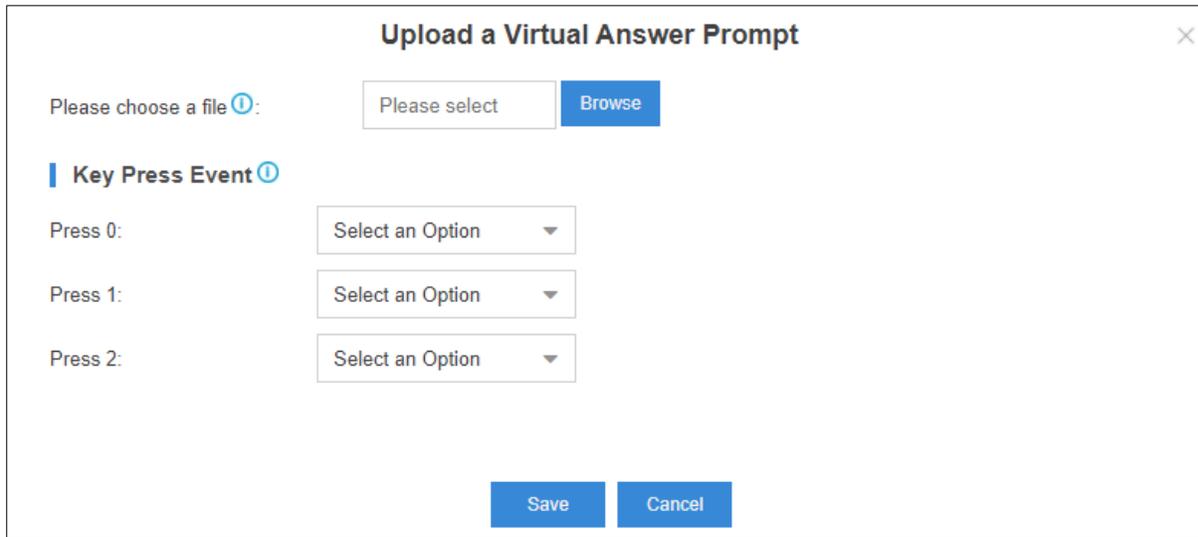
**Trigger Virtual Answer functions:**
Set up BLF key at phone as shown below:
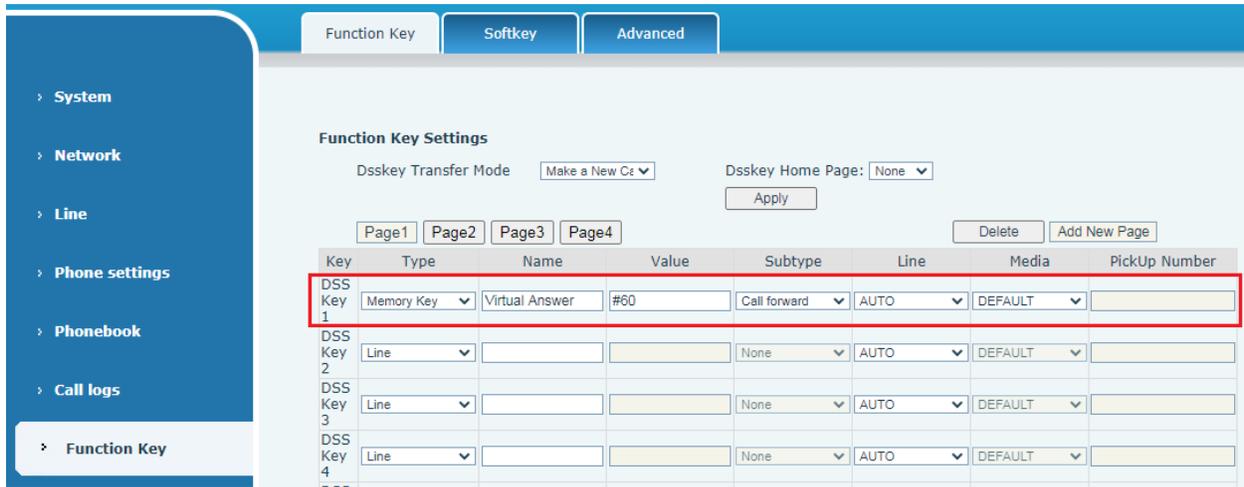


Note: Name and Value are not changeable in Easy Mode. Value should sync with the Virtual Answer Feature Code.

Or press the phone's choose call button, then press the 'call forward' button on phone first, then press Feature Code for Virtual Answer #60 to apply the virtual answer to that call.

Enhanced Call Waiting
Log into the eSIP Server and go to **Extension**- > **Presence** > **When Busy**, and select **Busy camp on** from the drop down list.
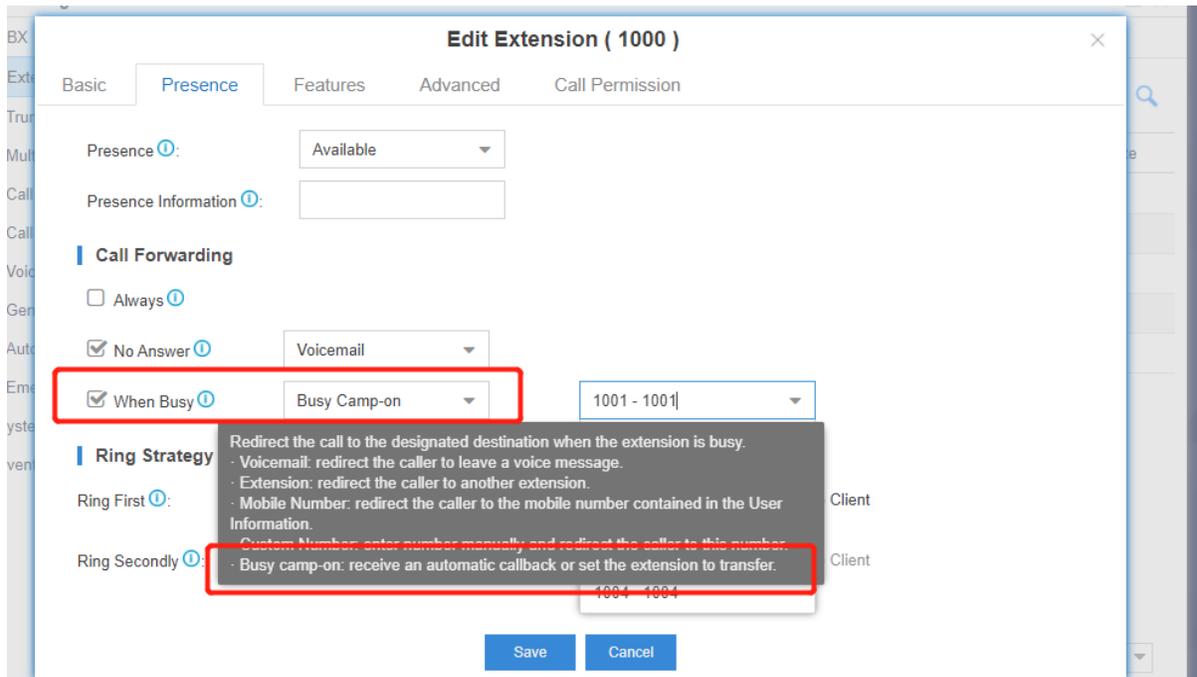
Disable phone's regular call waiting if needed for the user, so when the second call comes to the extension, rejecting the call operation would be not required. To do this, go to **Auto Provisioning**, select the extension to modify, select the **Features** tab and uncheck **Call Waiting**.
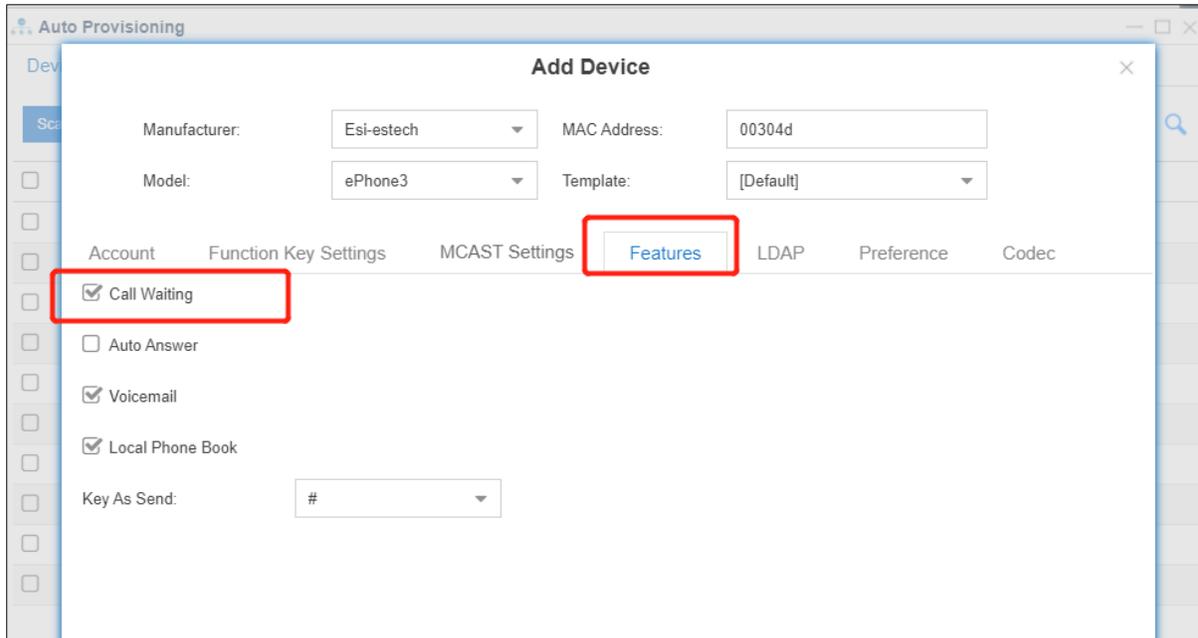


# Voice Mail

Different ways to check your voicemail:
- From your own extension: dial *2.
- **From another extension:** dial *02 to enter the voicemail voice menu, then dial your Extension number and password to check your voicemail.
- **Email:** "Voicemail to Email" feature is enabled by default. If an email address is set, the voicemail will send to the email.
- **Web browser:** Log into the GUI with your Extension number and password.

# Set up Enhanced Emergency Calling by setting 911 as a DOD

**Prerequisite:** Purchase enhanced emergency service from an Internet Telephony Service Provider. The ITSP will provide DID numbers that are associated with your locations.

**Procedure:**
- Log in to the eSIP Server web interface, go to **Settings→PBX→Emergency Number**, and click **Add**.
- In the **Name** field, specify a name to help with identification.
- In the **Emergency Number** field, enter the emergency number.
- In the **Outbound Caller ID Priority** field, select which outbound caller ID will be sent to the Public Safety Answering Point (PSAP).in priority when an emergency call is made.
    - **Trunk's Emergency Outbound Caller ID**: Select this option if you want to set a common ELIN for all extension users. PSAP receives the trunk's emergency outbound caller ID no matter who makes the emergency call, which indicates PSAP receives common location information.
    - **Extension's Emergency Outbound Caller ID**: Select this option if you want to assign ELINs for individual users.
        - Extension users with specific ELINs are associated with their respective locations.
        - Extension users without specific ELIN's share a common ELIN (the trunk's emergency outbound caller ID) and are associated with a common location.
- In the **Trunk's Emergency Outbound Caller ID** field, configure trunks for emergency calls.
    - In the drop-down list, select a trunk.
      **Note:** Emergency calls have the highest priority. If the selected trunk is occupied, the eSIP Server will terminate the ongoing call, and place the emergency call.
    - Enter the Emergency Location Identification Number (ELIN) that you have purchased from the trunk provider.
    - In the **Prepend** field, enter the prepend number if the trunk provider requires it.
        - **Important:** Only configure the **Prepend** setting when the trunk provider requires prepend numbers to place any outbound calls. Carefully configure the **Prepend**, or emergency calls will fail.  For example, the trunk provider requires a prepended number 0 for any outbound calls and users should dial 0911 to make the emergency call. To comply with the users' dialing habit, you can set the **Prepend** as 0. In this way, users can dial 911 as they usually do.
    - Click [+] to add another trunk.
      **Note** If the first trunk cannot work properly, the eSIP Server will use the second trunk to make calls.



- Click Save and Apply.

**Assign ELINs for individual users**
To provide the PSAP with the emergency caller's precise location, you may need to purchase multiple ELINs and assign these ELINs to extension users.

- Log in to the eSIP Server web interface, go to Settings→PBX→Extensions, click ✎ to edit the desired extension.
- On the extension Basic page, enter the ELIN in the Emergency Outbound Caller ID field.
- Click Save and Apply.

After the user dials an emergency number, the PSAP will locate the specific geographic location of the user by the extension user's ELIN.

After setting up emergency calling, you may need to consider the following configurations: See eSIP Admin guide.

- Add a notification contact for emergency calls.
- Set up a route for PSAP Callbacks.

# Contacts

## *Company Contacts Overview*

ESI eSIP Server Contacts feature allows you to add external contacts to Company Contacts and share the Company Contacts with your organization. Each extension user has a Personal Contacts to create and manage their personal contacts.

**eSIP Server requirements**
The Contacts feature is supported on the following eSIP Server models:

- eSIP 50
- eSIP 200
- eSIP 500

## *Contacts types*

**Company Contacts**
Company Contacts is a phone book that allows you to store a list of external contacts, such as the company's customers, resellers and partners.

**Note:** By default, only the eSIP Server administrator can view and manage Company Contacts. To share Company Contacts with extension users, refer to **Configure Company Contacts Permissions for Users.**

**Configure Company Contacts permissions for users**
Control who can view and manage the Company Contacts.

For more information, see **Configure Company Contacts Permissions for Users.**

## *Manage Company Contacts*

This topic describes how to add, edit, delete, import, and export company contacts on eSIP Server web page.

**Requirements**
Only the eSIP Server administrator and the authorized users can manage Company Contacts.

For more information of Company Contacts permissions, see **Configure Company Contacts Permissions for Users**.

**Operation permissions**
The authorized users can view or manage company contacts on both Web and eMobile, or view company contact on an IP phone.

| Operations | Web | eMobile | IP phone |
|---|---|---|---|
| View | √ | √ | √ |
| Add | √ | √ | × |
| Edit | √ | √ | × |
| Delete | √ | √ | × |
| Export | √ | × | × |
| Import | √ | × | × |

**Add a company contact**

- Go to **Contacts > Company Contacts**.
- Click **Add**.
- Enter the contact information.

**Note:** The **First Name**, **Last Name** are required fields, and at least one number is required.

- Click **Save**.

**Edit a company contact**

- Go to **Contacts > Company Contacts**.
- Select a contact, and click ✎.
- Edit the contact information.
- Click **Save**.

**Delete company contacts**

- Go to **Contacts > Company Contacts**.
- To delete a single contact, select the contact and click 🗑.
- To delete multiple contacts, select the checkboxes of the desired contacts, and click **Delete**.

**Export company contacts**

- Go to **Contacts > Company Contacts**.
- Click **Export**.

All the contacts will be exported to a CSV file.

**Import company contacts**

**Before you begin**

- Prepare a CSV file

To import contacts, you can export contacts to a CSV file.

Use the CSV file as a template, save your data in the same format. For the data requirements in the CSV file, see

Import Parameters - Contacts.

- Go to **Contacts > Company Contacts**.
- Click **Import**.
- In the pop-up dialog, click **Browse**, and select your CSV file.
- Click **Import**.

If the contact data is imported successfully, the web page will display the following confirmation.
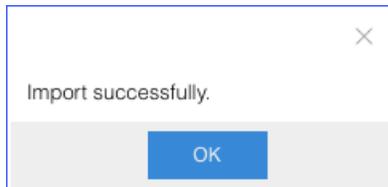


If you get an error prompt like the following figure, click **Yes** to check the log and update your data in the CSV file.
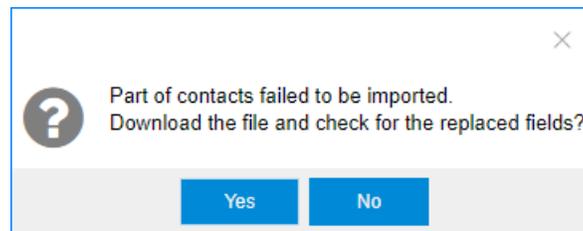


## Configure Company Contacts Permissions for Users

By default, only the eSIP Server administrator can view and manage Company Contacts. To share Company Contacts with your organization, you need to configure Company Contacts permissions for the users in your organization.

**Permissions**
The eSIP Server provides two permission levels: View and Manage.

**View Company Contacts**
The authorized users only have permissions to view the contacts information of the Company Contacts.
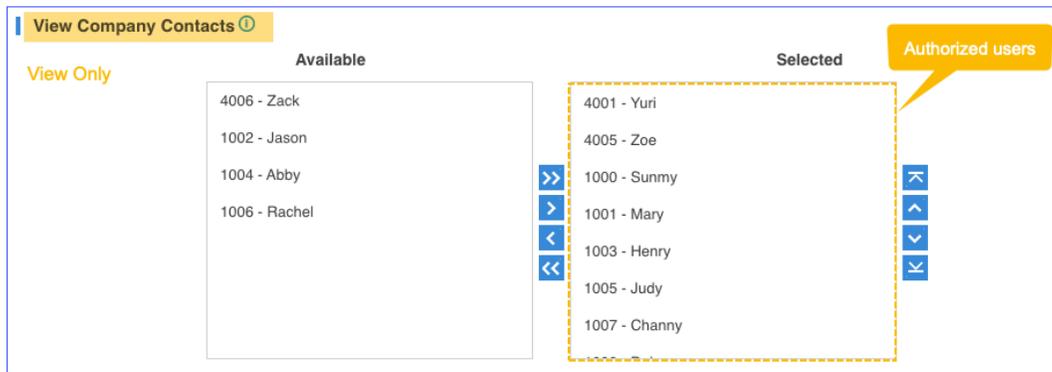
**Manage Company Contacts**

The authorized users have permissions to view, edit, add, delete, import and export the contacts of the Company Contacts.
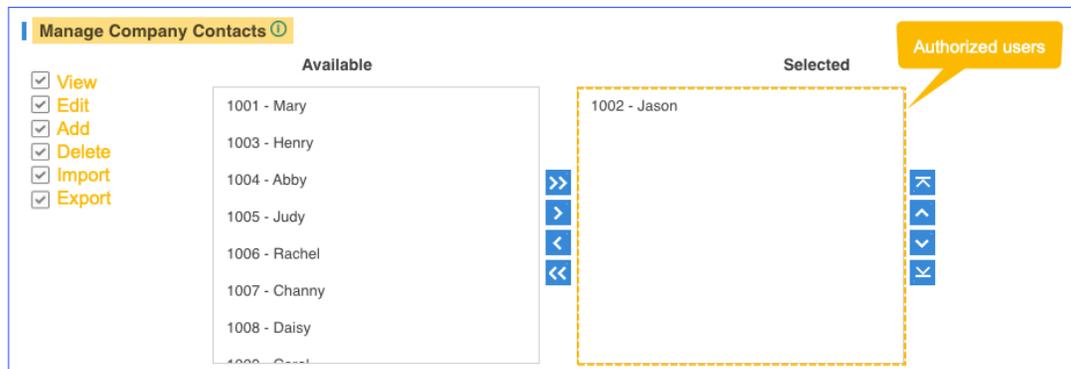


## Configure Company Contacts permissions for users

- Go to **Contacts > Settings**.
- To assign **View** permission to users, configure the section **View Company Contacts**.

Select the extensions from **Available** box to **Selected** box.

- To assign **Manage** permission to users, configure the section **Manage Company Contacts**.

Select the extensions from **Available** box to **Selected** box.

**Note:** Assign the Manage permission carefully to appropriate users. If a user delete contacts accidentally, the contacts would be lost.

- Click **Save**.

# Appendix A – Default Feature Codes

| | |
|---|---|
| One Touch Recording | *1 |
| Check Voicemail | *2 |
| Voicemail for Extension | ** |
| Voicemail Main Menu | *02 |
| Attended Transfer | *3 |
| Blind Transfer | *03 |
| Call Pickup | *4 |
| Extension Pickup | *04 |
| Intercom | *5 |
| Call Monitor - Listen | *90 |
| Call Monitor -Whisper | *91 |
| Call Monitor - Barge-in | *92 |
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