



ESI eCloud

ESI eTeams™ User's Guide

This document helps the end-user get the most out of the eTeams application and eCloud interactions by describing how to set the user settings for Teams and ESI's eCloud.

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Introduction

Target Audience: ESI Tech Support, Certified Partners, end-point users of eTeams

This document helps the end-user get the most out of the eTeams application and eCloud interactions by describing how to set the user settings for Teams and ESI's eCloud.

This document describes the following:

1. Navigating the Calls window in Teams
2. Configuring Teams to use ESI eCloud Voicemail
3. Accessing and Managing ESI eCloud Voicemail with Teams
4. Configuring audio settings for use in Teams
5. Sharing availability with Presence

Navigating the “Calls” Window in Teams

While some users are highly experienced with Microsoft Teams (hereafter, referred to as Teams), it is likely that the Calls window within Teams is new. The following summarizes that panel and offers suggestions that will improve the user experience. Most of this summary is a simple image with short text-based descriptions.

Calls Layout

By selecting the Calls icon on the Teams command ribbon (the left column of icons that drives the apps within Teams,) the user can originate phone calls and, with the eTeams integration, directly access the eTeams App to connect with the ESI eCloud User Portal for messaging.

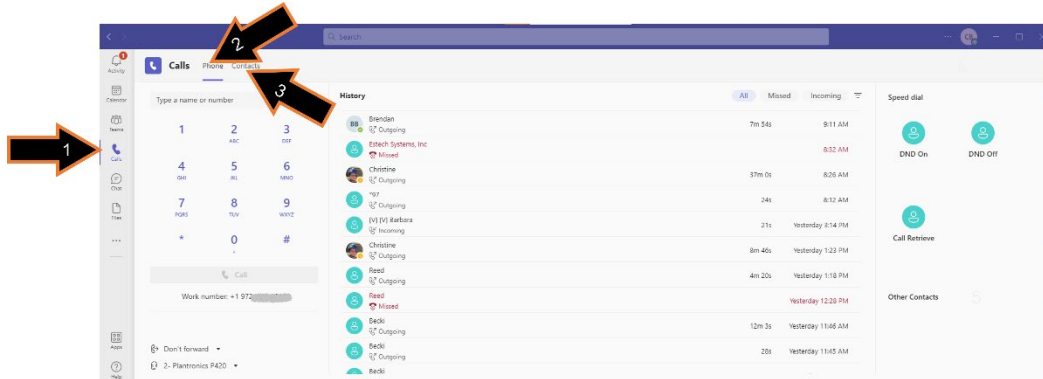


Figure 1: Calls Panel in Teams

1. Clicking the Calls icon brings the ability to make and manage phone calls, messaging, and contact management.
2. The Phone tab provides quick access to a dial pad, call history, and a few other tools.
3. The Contacts tab is the area that allows the user to manage contacts and frequently dialed numbers.

Phone Tab

Selecting Phone tab places the user on the main page that allows the user to make and receive calls. The tab has five areas: Dial Pad Area (1), Call History Area (2), Speed Dial (3), Other Contacts (4), and some selectable options (5).

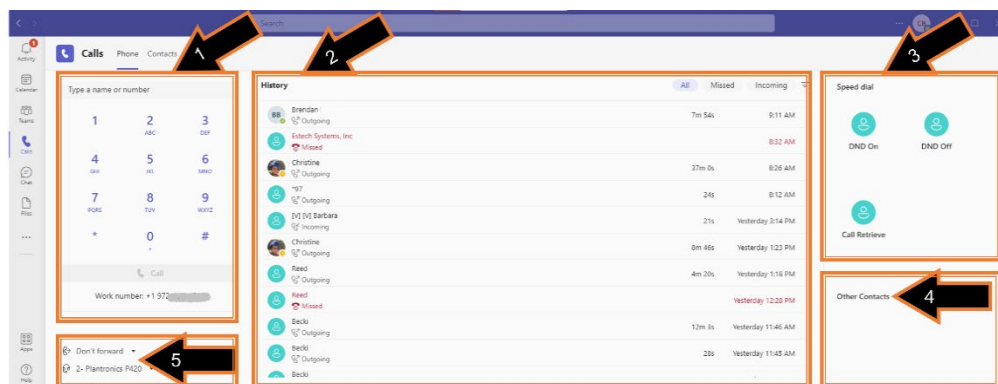


Figure 2: The Five Phone Panel Areas

Dial Pad Area

The Dial Pad Area provides the user with the primary means for making calls, be it to other persons in their company or with customers, partners and clients that require “dialing” a 10-digit number. With the softphone client, a user has a few ways to start the call.

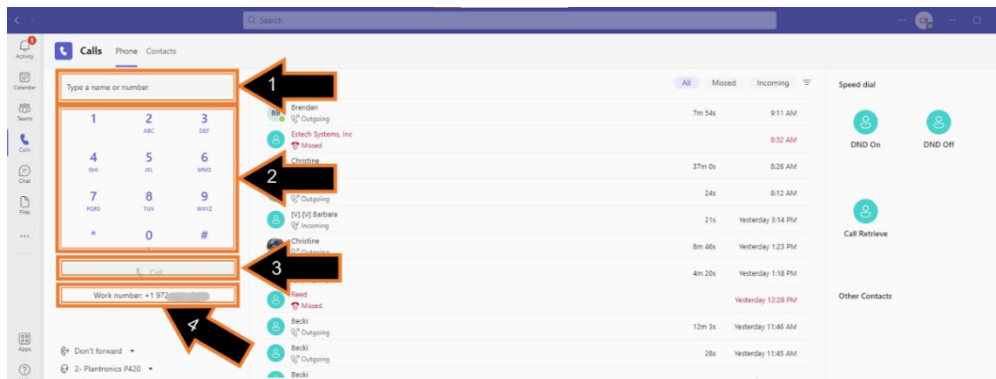


Figure 3: Phone Panel's Dial Pad Area

1. **Type a name or number:** using their computer keyboard or numeric keypad, the user type in the number of the person they want to call. If the name is in the Teams system in their company, the user can type their name and the system will bring up their contact information.
2. **Dial Pad:** The user can use their mouse to click the digits of the number they want to call.
3. **Call:** After entering a number, the user clicks on the Call button to place the call.
4. **Work Number:** This number is a direct dial number that will route calls directly to this user. When making a call, the ESI eCloud presents this number if the business has not selected a branded number for presenting. For example, callers from ESI, who use the eCloud, have the setting set so that their calls show “972-422-9700.” Alternatively, ESI can use the direct dial work number as the calling number for outbound calls.

The user can also use click on a number from the call history, a number in the speed dials, or a number in the “other contacts” area to begin a call.

Call History Area

The Call History Area provides the user with the listing of inbound, missed, and all calls.

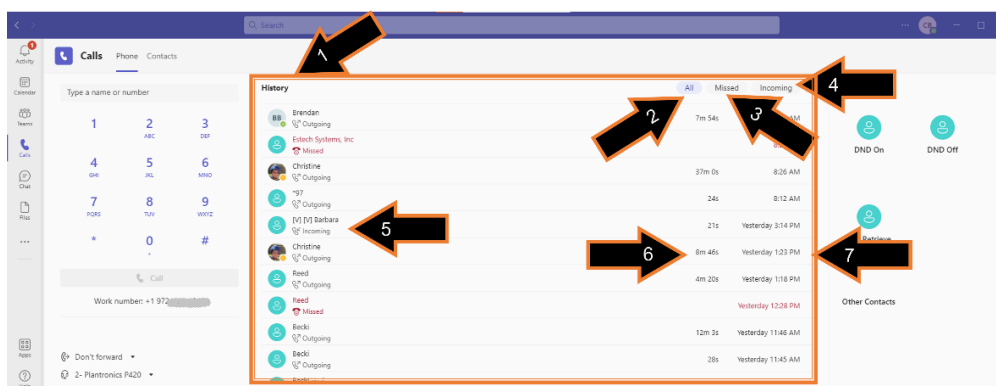


Figure 4: Phone Panel Call History Area

1. **Call History Area:** The user can select the calls displayed by selecting one of a call filter type.
2. **All:** This call filter displays all inbound, outbound, internal, and missed calls.
3. **Missed:** This call filter displays the inbound calls that were not answered using the Teams client. Calls answered by the user with a desk phone or mobile phone that aligns with their extension will see these calls in this category, even though they were answered by another device.
4. **Incoming:** This call filter displays all inbound calls – answered or not.

5. The first column contains the name or number of the other party in the call. If there is not a name associated with the phone number in the ESI system, this field shows the phone number.
6. The second column shows the call duration
7. The third column shows the date and time of the call.

Selecting a call displays many of that call's details:

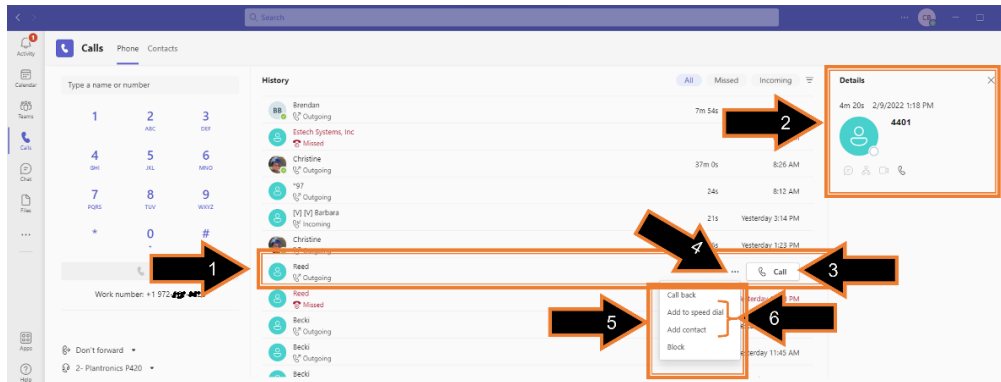


Figure 5: Call History Line Information

1. The user selects the entry
2. The system puts the call details for this call in this box. If the other party in the call is on the ESI eCloud system, the small circle on the left side of their image/avatar includes the *current* value of their presence indicator. In this case, this person called from outside the eCloud system, so there is not a presence value to indicate. This call filter displays all inbound, outbound, internal, and missed calls. Also, the options for connecting with this person show under the avatar – the user can select black/dark gray items but cannot select light gray items.
3. Call: This button allows the user to call the person.
4. ...: Clicking the ellipses button (the three dots to the left of the call button) brings up a window that allows the user to quickly take an action with the person in the selected call.
5. Actions: Action available for the number are based on the type of user

Action	eTeams Participant	Non-eTeams Participant
Call	Yes	Yes
Add number to speed dial	Yes	Yes
Add contact	Yes	Yes
Chat	Yes	Available in eTeams App User Portal
Block	No	Yes

Speed Dial Area

The Speed Dial Area allows the user to place commonly called numbers and relevant features for easy one-click access. Many of the features available on the ESI phones trigger with a button. In the background, the phone sends an asterisk followed by digits for many of these features.

Since the Teams Calls softphone client does not allow a user or system to program buttons like the ESI phones, ESI recommends setting relevant features up as Speed Dial numbers. The following features are good candidates for this service:

Service	Feature Code Sequence
Voicemail	*97
Parked Call Retrieval	*1110
Do not disturb – activation	*78
Do not disturb – deactivation	*79
Forward all calls – activation	*72
Forward all calls – deactivation	*73
Forward busy calls – activation	*90
Forward busy calls – deactivation	*91

The following steps show how to create a contact entry called “Voicemail” that allows user to select a speed dial button to access ESI Voicemail. The user executes the same steps for any service listed above. Note: the user has additional steps to perform complete integration of Teams with ESI Voicemail, as depicted in Configuring Teams to Use ESI Voicemail on page.

Other Contacts Area

The Other Contacts Area provides users with easy access to frequently dialed numbers that reach people and invoke relevant features. Users can easily convert call history listings to contacts with a few clicks, as described in Call History Area on page 5.

Selectable Options

Currently, this area of the Phone tab provides dropdowns typically accessed through the personalized User Settings in the right side of the Teams command ribbon. Quick access here provides the user to change the audio devices used in Teams and can activate and/or select the call forwarding options.

The call forwarding drop down contains options to not forward, forward to voicemail, or forward to numbers that the user creates in the user settings.

NOTE: In this section, leave the setting of “Don’t forward.” This setting allows the ESI eCloud system to properly manage and capture unanswered calls for voicemail on the ESI platform.

The other option in this section allows the user to select from audio devices available on the user’s laptop or PC. Setting the device here can occur at any time – before the start of or any time during a call or conference.

Contacts Tab

The Contacts Tab provides Teams Users with an environment to manage contacts that are not part of their team in Microsoft Teams. Similarly, Contacts list allows the user to store and save the contact details for any dialed number that they need to contact.

The Teams Contacts listing provides:

1. The name of the contact
2. The title of the contact
3. The phone number for the contact
4. Up to four icons for each user to indicate how Teams can communicate with that contact:



Figure 6: Available Communication Options for a Contact

- a. Phone icon- phone calls can reach this contact
- b. Camera icon – video calls work with this contact, as they are a Teams user
- c. Envelope icon – user’s email address is available, as they are a Teams user
- d. Bubble icon – user can have Teams chat capabilities, as they are a Teams user
- e. Ellipsis icon – shows the specific details for this user, including the type of phone number, if the contact is a speed dial entry, allows the user to edit or remove the contact, or to block calls from this contact.

When a user presses a programmable button or soft key on an ESI phone, the device often sends a “feature code” to the system to tell it what the user wants to do. This code is usually an asterisk (“*”) followed by a series of digits. Since the Teams Phone does not have programmable buttons, ESI recommends placing these feature codes in the Contacts, and then adding the more frequently used items as speed dial entries. The user creates as many clickable buttons as they want to emulate many of the ESI Phone features.

To add a new contact that the user can invoke to access voicemail settings and messages:

1. Click “Contacts” at the top of the window

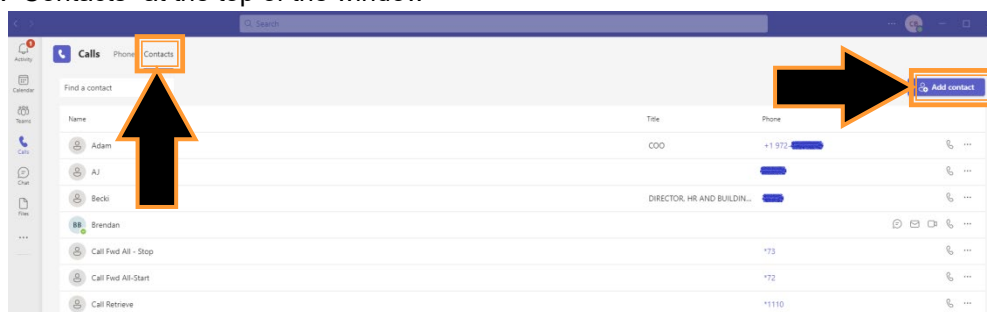


Figure 7: Teams Contacts Window for adding a contact

2. Click “Add Contact” on right side of the window
3. Type the relevant phone number or feature code be creating; in this case, use the feature code for voicemail.
 - a. As the user types, the system searches for a matching number and displays what it finds
 - b. When it does not find a match, it says so.

- c. Either click the number found (in gray) or click “Create a new contact” button

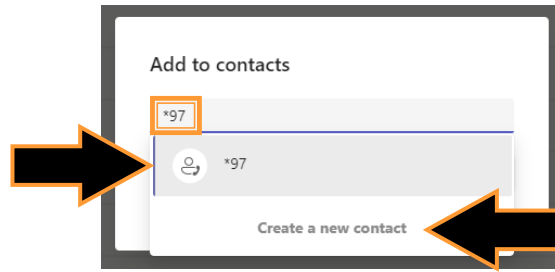


Figure 8: Searching for an existing contact

- d. If the abbreviated Add to Contacts window opens, click the “Add” button

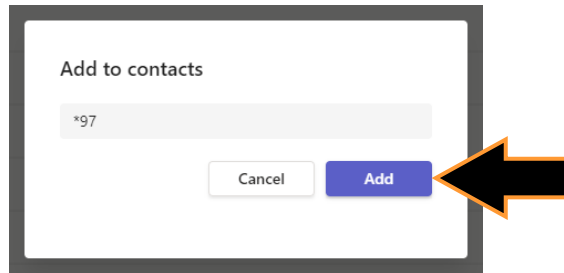


Figure 9: Add to Contacts Prompt

- e. Fill in the details in the “Add to contacts” form
 - i. “Full Name” is the complete first and last name or service description that identifies the use of the number. Change the feature code number entered during the search to the descriptive text – in this case, replace “*79” with “Voicemail”
 - 1. Duplicate names are allowed
 - ii. “Company” and “Title” are optional fields that are not needed for Voicemail, so no need to enter anything here.
 - iii. “Phone” is the number that the system will send. For voicemail, enter “*97” if that string is not already in the “Phone” field.
 - 1. Duplicate numbers are not allowed. When Teams finds an existing entry for the number being attempted, it responds with an appropriate error message in the lower right corner of the computer screen
 - iv. Click the “Add” button to save the correct and confirmed information

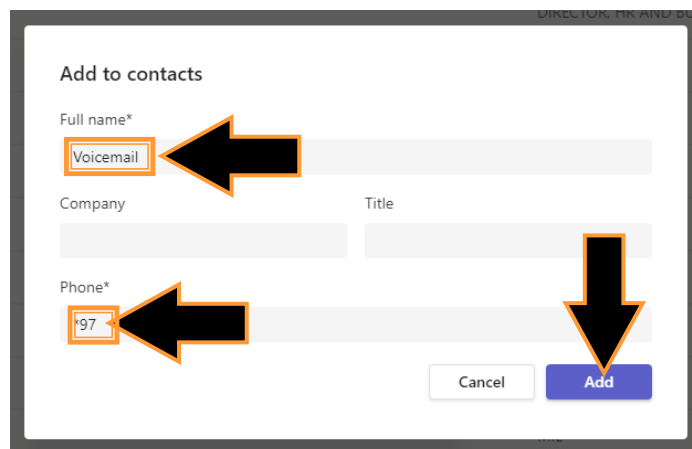


Figure 10: Enter Information for new contact

- f. Contact’s location in the list
 - i. The new contact is now at the bottom of the list of users

- ii. The next time the user selects the “Contacts” tab on the Calls command line, all cards will be in alphabetical order
- g. Click the “Action” ellipses in the far-right column for this new contact, “Voicemail”

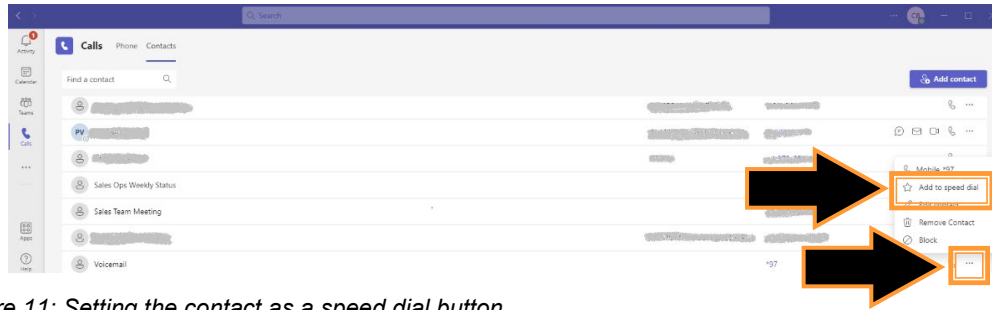


Figure 11: Setting the contact as a speed dial button

- h. Click “Add to Speed dial” to put this contact as a speed dial button on the Phone page.
- 4. The resulting speed dial list for this user now has the voicemail speed dial button ready for use.

NOTES: Speed dial buttons cannot be sorted or repositioned in the list. However, once they are in the contacts list, the user can remove and read them in any order they chose.

Configuring Teams to Use ESI Voicemail

Since ESI's voicemail offers more features and functionality than the Microsoft Phone voicemail platform, ESI recommends the following settings so that all calls route to ESI's voicemail so that there is only one location for managing voicemail and voicemail settings.

1. Log in to Teams using Microsoft credentials
2. Click the ellipses next to the user image in the command ribbon at the top of the Teams window. Being in the purple "command ribbon," these items are available on all pages of the Teams app or Teams website.
3. Click the Settings from the resulting drop down to access the Teams User Settings:

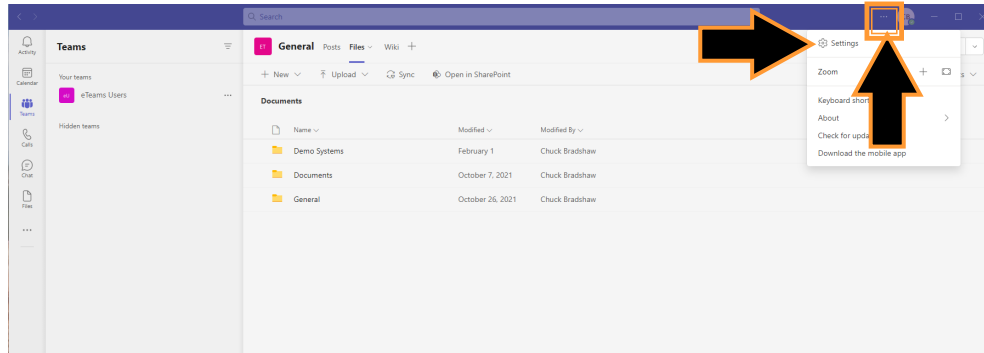


Figure 12: MS Teams Landing Page

4. Press the Calls icon from the menu in the left-hand column to get the following form:

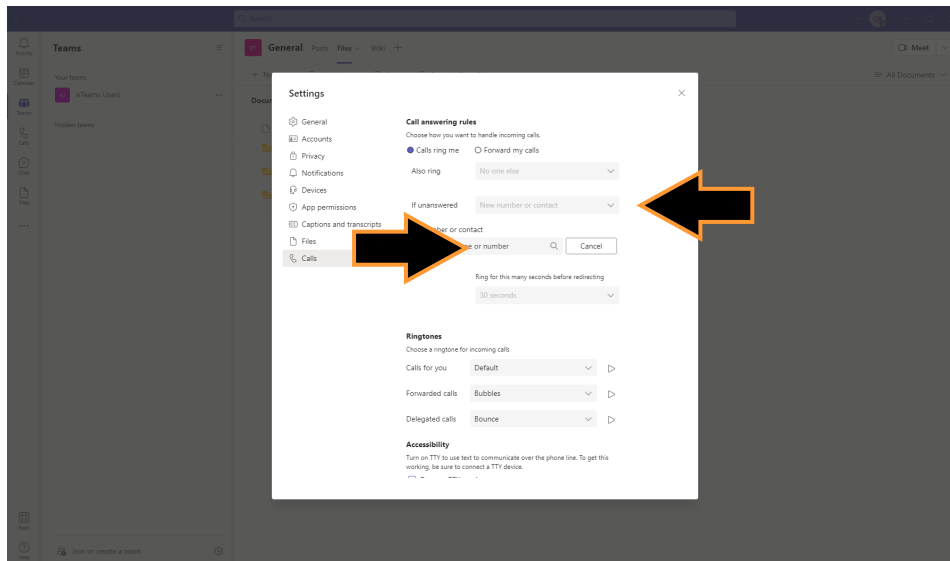


Figure 13: MS Teams Calls with Call Settings

5. For Call Answering Rules, the ESI platform handles all call redirection; do not select the Forward my calls or Also ring options.

To use the ESI voicemail platform:

- a. Click the If Unanswered dropdown and select New Number or Contact
- b. Click the gray box and select New number or contact
- c. Add number or contact: Use keyboard to replace any current text (it might say "Search for a name or number") with 03 followed by desired extension. In the following example, the string 032004 indicates that the user's extension is 2004

NOTE: The three most-recently entered names and/or numbers remain in this dropdown. Currently, Microsoft has not communicated any plan to change this implementation.

- d. Select the number that aligns with the information entered in the box as displayed in Figure 14

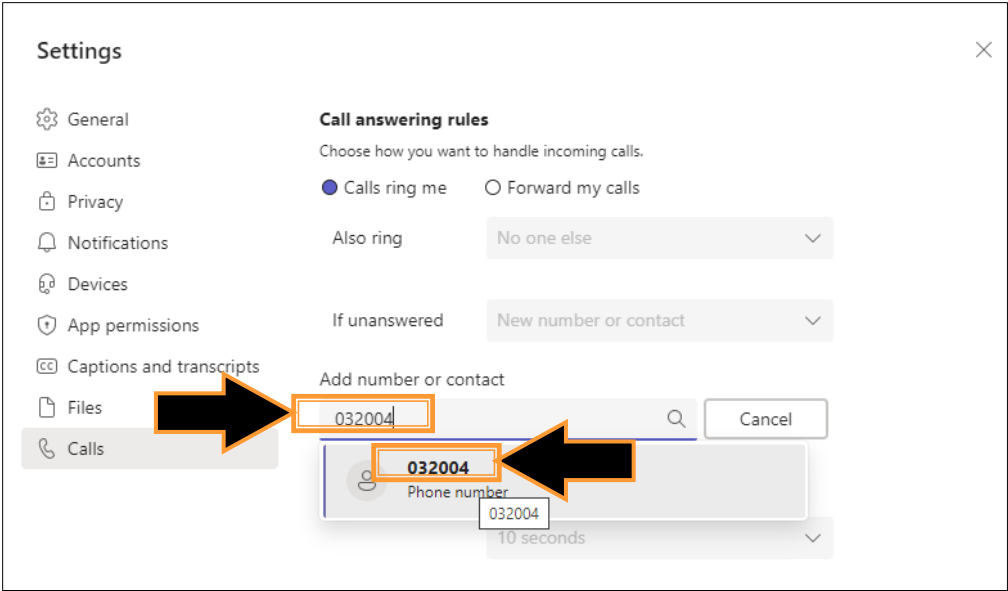


Figure 14: Redirection number for Unanswered calls to route to ESI Voicemail

- e. Ring for this many seconds before redirecting: Ensure that the value in this field is set to 30 seconds. If not, choose that value from the dropdown list as displayed in Figure 15.

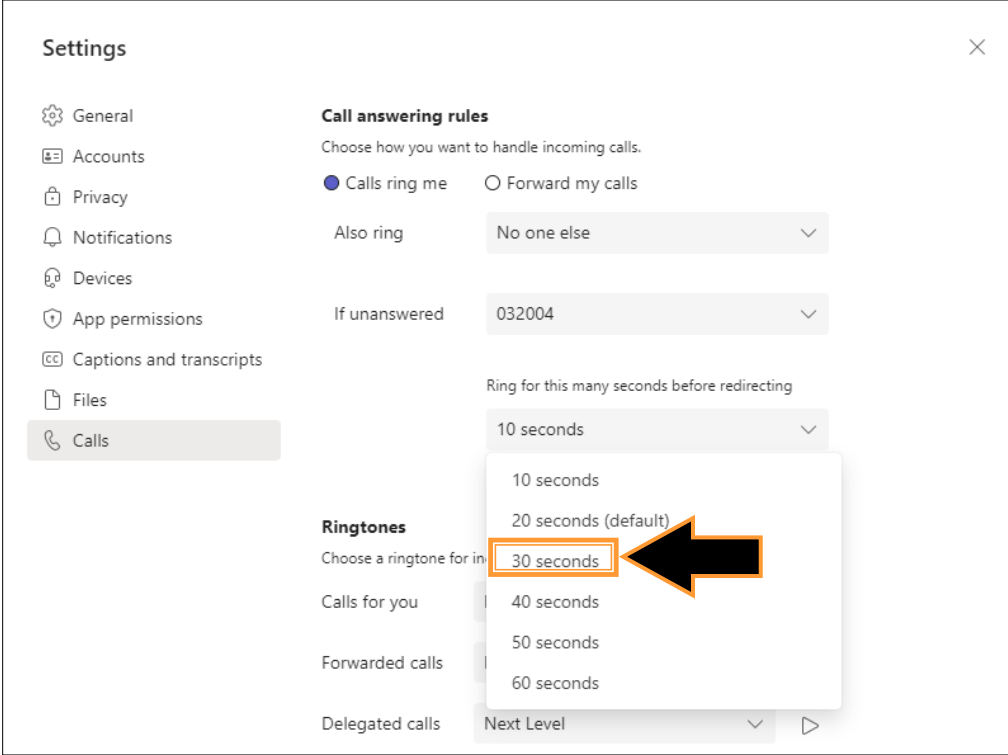



Figure 15: Number of Seconds Teams Device Rings Before Redirection

NOTE: Selecting a value less than 25 seconds will cause the Teams Voicemail to answer the call. An ESI eCloud user expecting voice mail messages to arrive in your email inbox will not receive emails, as Teams does not offer this capability.

6. Additional options in the Teams User Settings include setting the ringtone to apply. Examples are in the Figure 3:
 - a. Calls for you: This ringtone value plays when your extension or Teams number is the destination of an inbound call.
 - b. Forwarded Calls: This ringtone value plays when a Teams colleague forwards a call to this extension.
 - c. Delegated Calls: This ringtone value plays when a Teams colleague's delegates this extension to answer calls associated with their extension.
7. Save the settings by clicking any of the commands in the command column or by clicking  to close the window.

Accessing and Managing ESI Voicemail with Teams

Since the Teams softphone client does not have programmable buttons, ESI has a few options for helping eTeams users access their voicemail. With the integration of Teams and ESI's eCloud phone system, one easily accessible approach to accessing voicemail is to set up a speed dial button. Another option is to leverage ESI's easy-to-use eConsole User Portal to listen to voice messages and set up the various settings for their voicemail account and for confirming their previous 90 days of calls.

Using the Teams Calls Panel to Access Voicemail

The Teams Calls panel can allow the user to call into the eCloud voicemail platform, and the easy way to trigger this access is to create a speed dial button on the Calls panel of the Teams app.

1. Click "Calls" button on the Teams command ribbon (left edge of the Teams window)
2. Click "Contacts" at the top of the window
3. Click "Add Contact" on right side of the window

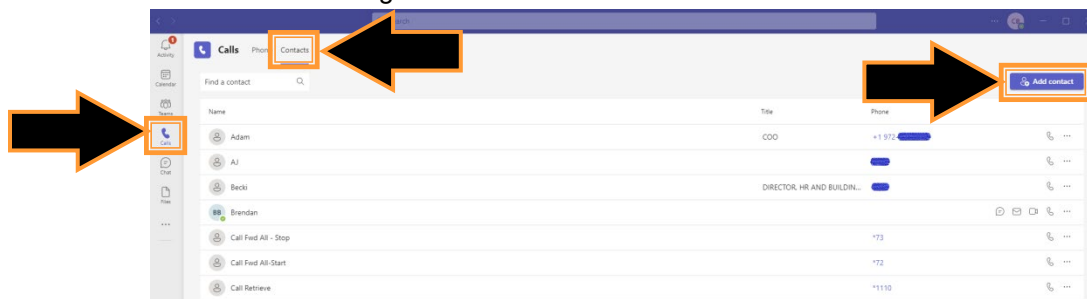


Figure 16: Teams Contacts Window to add a contact

- a. Type the *phone number* of the contact to be created; in this case, type "*97". When typing a name that is not a Teams user, a box will pop saying "We didn't find any matches." At this point, you have to go back to the input field and type in a new name that is in Teams, or a phone number. When entering the phone number, the system will allow that number to be added as a contact.
- b. As the user types, the system searches for a matching number and displays what it finds
- c. Click either the gray box with the phone number or the Create a new contact button

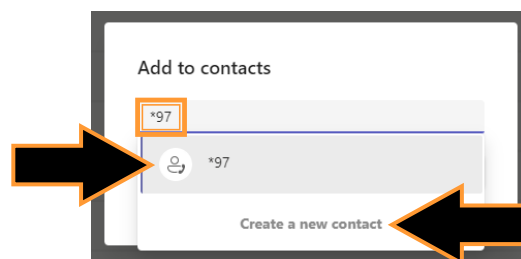


Figure 17: Searching for an existing contact

- d. If a window like the following appears, click the Add button

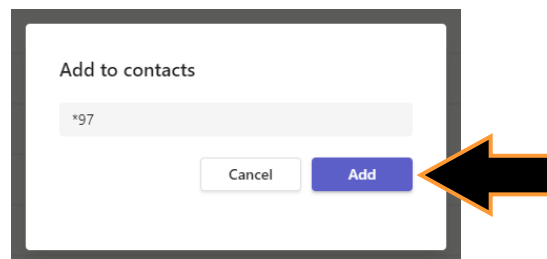


Figure 18: Add to Contacts Prompt

- e. Fill in the details in the “Add to contacts” form
 - i. “Full Name” is the complete first and last name or service description that identifies the use of the number. Change the text entered during the search to the text you want displayed – in this case replace “*97” with “Voicemail”
 1. Duplicate names are allowed
 - ii. “Company” and “Title” are optional fields that are not needed for Voicemail, so no need to enter anything here
 - iii. “Phone” is the number that the system will send. For voicemail, ensure that “*97” is in this field
 1. Duplicate numbers are not allowed. When Teams finds an existing entry for the number being attempted, it responds with an appropriate error message in the lower right corner of the computer screen
 - iv. Click the “Add” button to save the correct and confirmed information

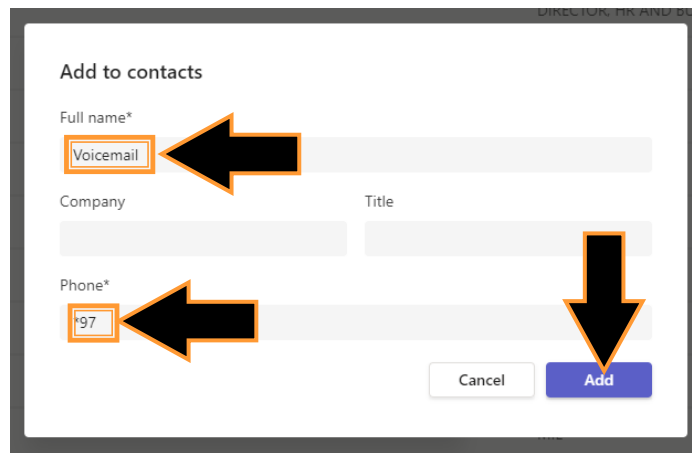


Figure 19: Enter Information for new contact

- f. This new contact is now at the bottom of the list of users
 - i. The next time the user selects the “Contacts” tab on the Calls command line, all cards will be in alphabetical order
- g. Click the “Action” ellipses in the far-right column for this new contact, “Voicemail”

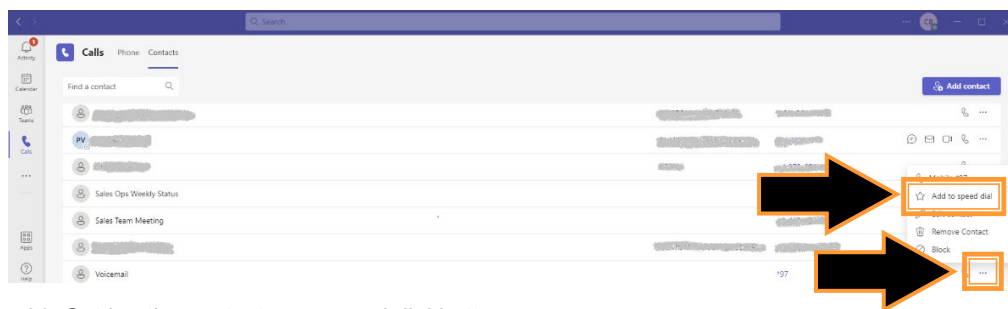


Figure 20: Setting the contact as a speed dial button

- h. Click “Add to Speed dial” to put this contact as a speed dial button on the Phone page.
4. The resulting speed dial list for this user now has the voicemail speed dial button ready for use.

NOTES:

Speed dial buttons cannot be sorted or repositioned in the list. However, once they are in the contacts list, the user can remove and read them in any order they chose.

The number of speed dial buttons is not limited, but effectiveness of speed dials is controlled by the size of the Teams window. A larger Teams window allows visibility of more speed dial buttons.

Using the eTeams App to Manage Voicemail

Another approach to access and manage voicemail is to use the eTeams app that provides an easily accessed portal to the ESI eCloud User Portal, where authorized users can manage their voicemail options and settings, as well as see their call history and adjust the devices that they use for making and receiving calls.

1. Click [eTeams](#) button on the Teams command ribbon (left edge of the Teams window.) The default landing page for the eTeams app is the Home tab of the ESI eCloud User Portal, but there are also other areas for the user to access:
 - a. [eCloud Soft Keys](#) provides access to system-defined feature codes that the user can invoke prior to making a call
 - b. [Chat](#) displays system messages to the user for things like message waiting notification and other eCloud system messages directed to this user
 - c. [About](#) shares a few administrative details about the eTeams app

On the Home tab of the eCloud User Portal, the user has immediate access to take action on new voice messages (play, return call, download, save or delete – all with the press of a button.)

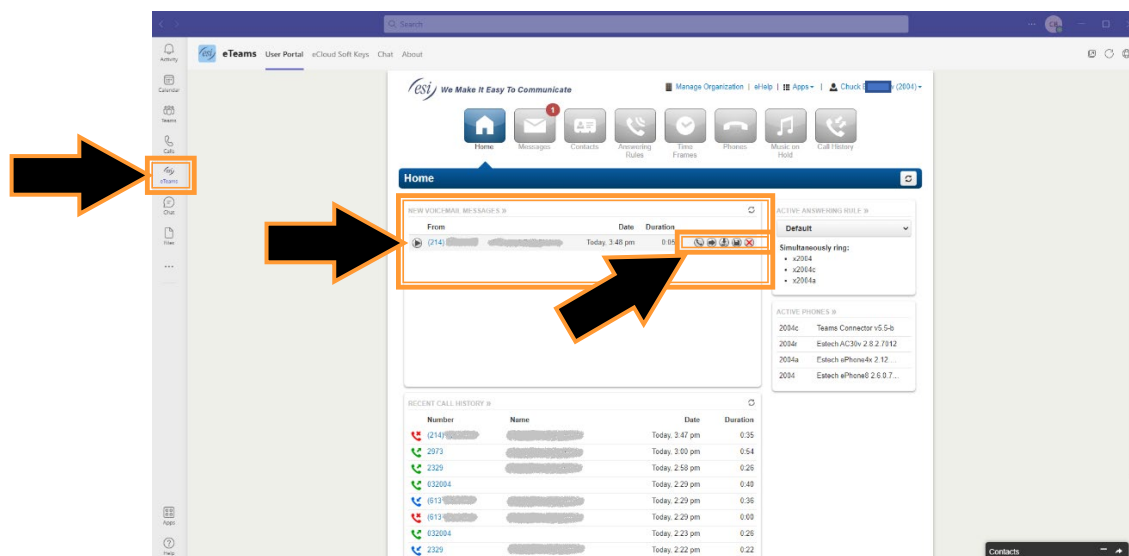


Figure 21: eTeams Access to eCloud User Portal

2. [Messages](#) - The landing page for the [Messages](#) tab provides access to the messaging platform interface where the user has access to [Voicemail](#) messages, [Chat and SMS](#) messages, and voicemail [Settings](#).
 - a. The Voicemail tab, which displays a “red oval with a 1” in the upper right corner of the Voicemail tab in Figure 22, contains all of the user’s new or saved voicemail messages. This area allows the user to act (play, return call, download, save or delete) on any of their voice messages on the system with the press of a button.

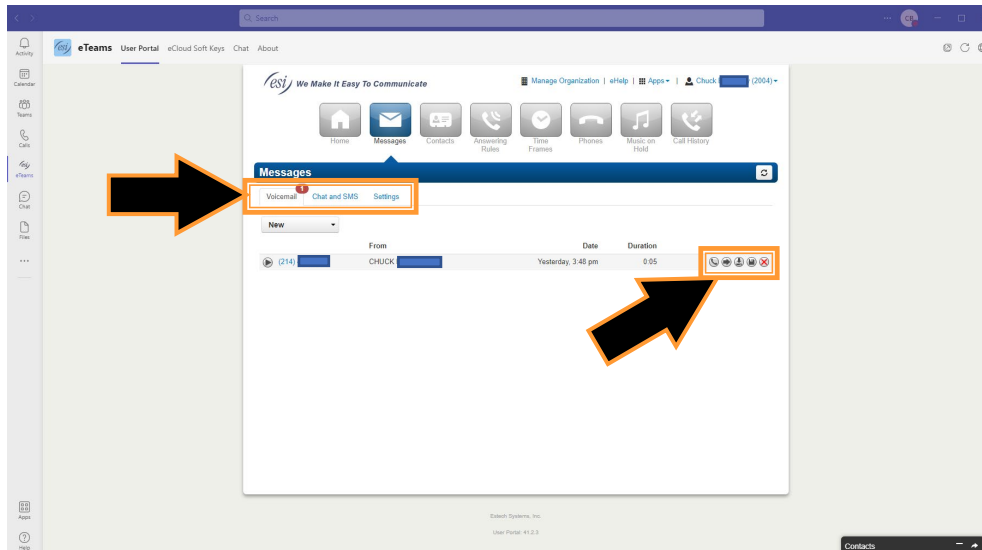


Figure 22: eTeams User Portal Messages Panel

- b. Chat and SMS: This tab provides the ability to see conversations with ESI colleagues and external colleagues, and by pressing New Conversation (in the upper right corner of the window, below the blue bar), the subscriber can start a chat or SMS session by entering a contact's name or any 10-digit phone number (however, a text message sent to a number text capable of receiving text messages will reject the message.)
- c. Settings: This tab allows the user to personalize their voicemail settings.
 - i. Inbox options range from how to sort the messages to the choice for announcing the caller ID of the message.
 - ii. The user can select the type of greeting to use, be it a greeting they record or a text-to-speech greeting that uses one of the seventeen voices on the system that provide a very good conversational tone.
 - iii. The final option is the choice to use Unified Messaging to optionally send the received voice mail message transcribed into email or as an audio clip attached to an email.

Voicemail Routing Rules

To eliminate the extra effort by eTeams users to manage two voice mail systems, ESI deploys routing rules on the eCloud PBX so that all calls, including calls from one Teams user to an eTeams user, get managed on the ESI voice mail system.

Part of this solution requires some very simple updates by each user to their Teams settings. Each user needs to set up the following information when they are setting up their preferences in Teams. Figure 1 provides an image to help with the steps below:

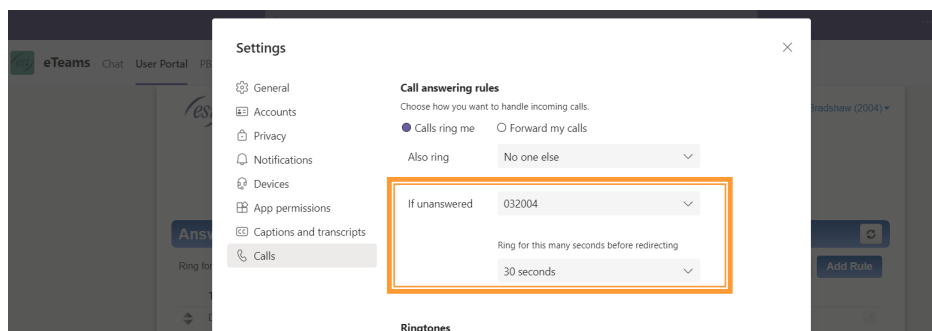


Figure 23: Teams Settings on the Teams App for Managing Voicemail

1. Click the ellipses in the upper right portion of the Teams command ribbon.
2. Click the Setting gear
3. Click the “Calls” icon on the left side of the Settings window
4. Click the drop down next to “If Unanswered” and select “New number or contact”
5. In the space below “Add number or contact” enter 03 and the extension for this user. The system correctly fails to find a corresponding number. Click the gray line below where the number was entered that contains the 03 followed by the user’s extension to set this number for routing of unanswered calls on the Teams application.
6. In the drop down below the “Ring this many seconds before redirecting,” select a value that is larger than the setting in the ESI system. Since we recommend the no answer timer to be 25 seconds on the ESI platform, the appropriate value on the Teams side corresponds to 30 seconds. The unanswered calls on the ESI platform will drop the call to the Teams endpoint when the ESI eCloud redirects the call to the ESI Voicemail platform.
7. On the Teams app, click the “x” in the upper right corner of the Settings screen. Voicemail routing is now set up.

After providing any updates to the user information (depicted in Figure 16), the enterprise admin will press the “Save User” button.

Configuring Audio Settings for Teams

Since Teams uses a laptop or PC for handling voice calls, it is important to understand the controls available to the user to manage voice quality on Teams calls and meetings. These controls allow the user to change the device, even in the middle of a call, whenever necessary, like when the battery on the Bluetooth headset becomes exhausted or the user wants to use the system microphone with headphones.

1. Click the ellipses next to the user image in the command ribbon at the top of the Teams window. This is available on any page of the Teams app or website.
2. Click the Settings from the drop down to access the Teams User Settings as in Figure 1.
3. Press the “Devices” item in the left-hand menu to see the following options:

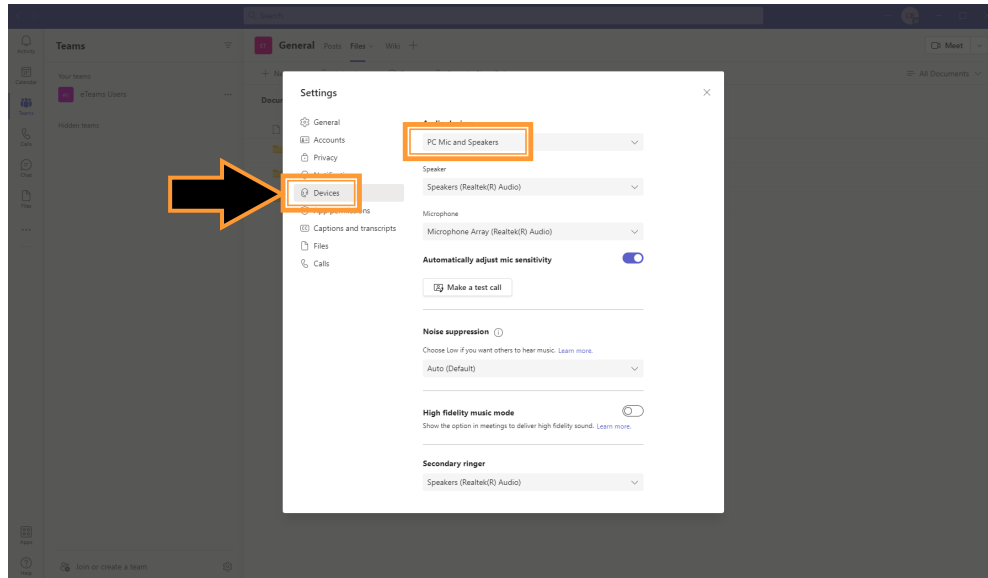


Figure 24: MS Teams Devices Settings

4. The Audio Devices section displays dropdowns for ultimate in flexibility.
 - a. Audio Devices: Indicates the external or internal system providing the current audio services. Figure 5 shows Teams is using the PC’s integrated microphone and speaker.

NOTE: Be careful if changing the speaker and microphone settings to use different suppliers. Integrated microphone and speaker (headphone, earbud) systems are very good at preventing echo from their corresponding source, but they may not be as effective with other devices.

- b. By clicking the Audio Devices dropdown arrow, the user can select from additional integrated systems that are present on the computer system. Figure 6 shows two additional integrated audio devices.

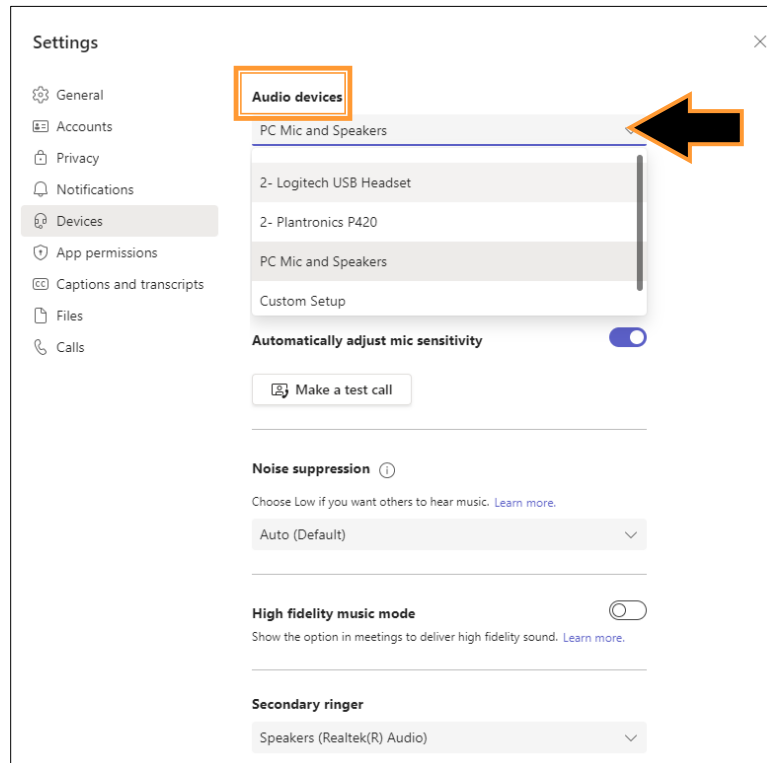


Figure 25: Additional Audio Systems on Computer

- c. The Teams user can select specific components for the microphone and/or speakers by selecting the dropdown for that unit. Figure 25 shows selecting the audio output option,

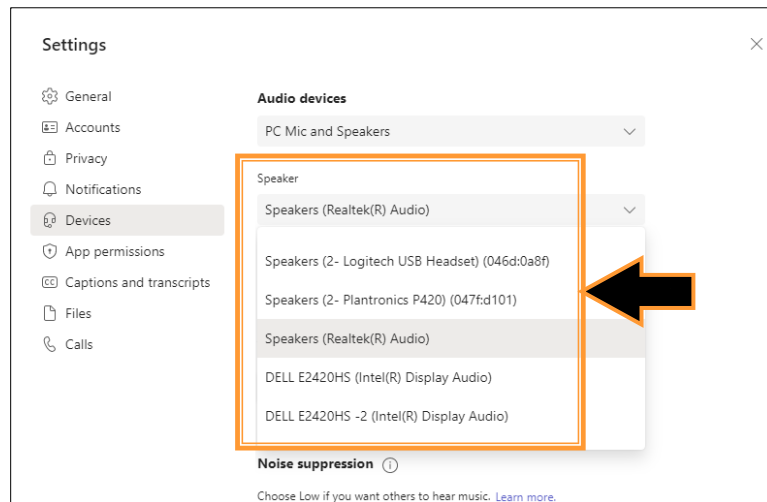


Figure 26: Selecting Options for Speakers for Teams Activities

and Figure 26 shows selecting the audio input option.

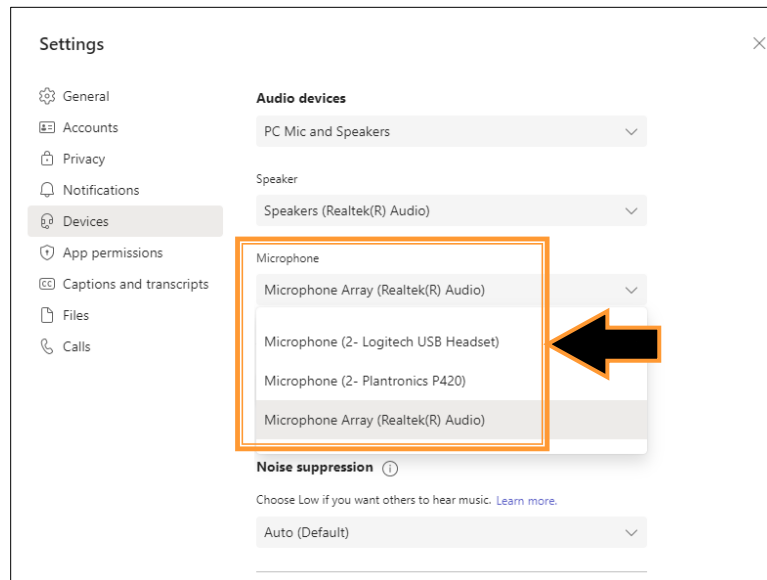


Figure 27: Selecting Microphone Options for Teams Activities

- d. **Secondary ringer:** This value identifies a second audio output source to play the ringing tone when a call arrives. This alert is highly useful for those with headsets and earbuds, as the ears need a rest from the device every now and then.

ESI does not recommend using the secondary ringer when:

- i. Audio output plays through the computer’s internal speaker system
- ii. Audio output plays through external speakers or an external conference unit

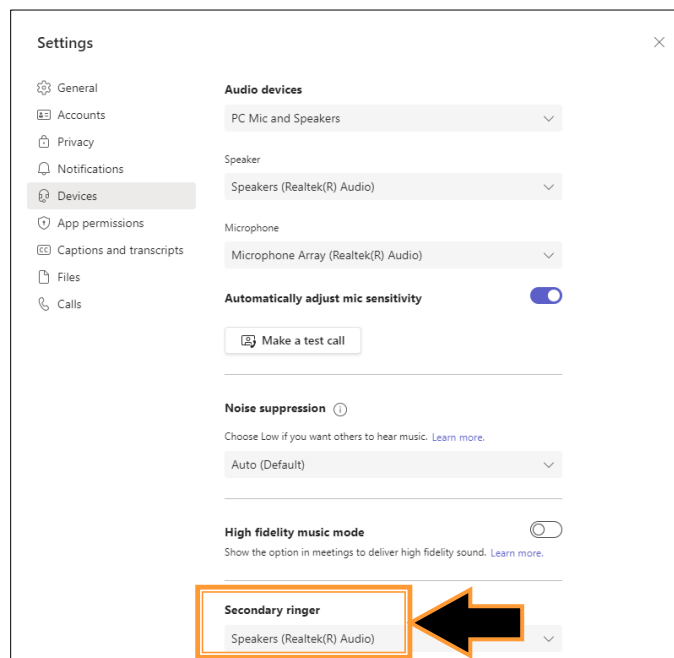


Figure 28: Teams Second Ringer

- e. **Make a Test Call:** Before completing the setup, Teams includes a third-party app that allows the user to confirm that the audio settings are sufficient. Click the Make a test call button and follow the instructions.

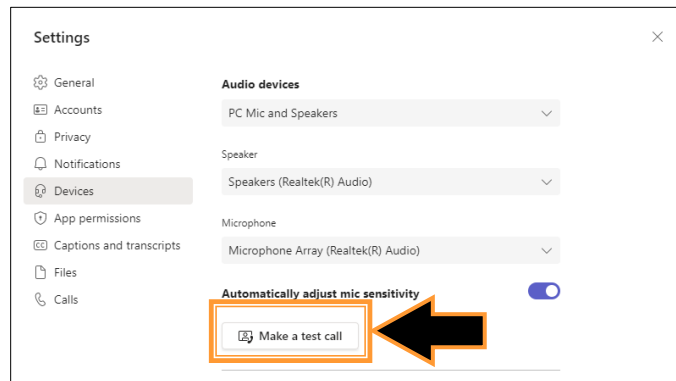


Figure 29: Confirming Audio Settings for Teams Activities

Monitoring Availability of Colleagues With Presence

Using IP-based communications, ESI's eCloud system shares the status of eTeams users who are on calls hosted on the eCloud. Once activated on the eTeams Connector by ESI, users have the flexibility of monitoring the status values of their colleagues, allowing them to quickly determine if they are available for communication. The option allows each user to activate on his or her Teams panel the presence values of other persons. These presence values are away, available, busy, do not disturb, in a call, and offline.

The user activates seeing this information available by setting the Presence Monitoring field in the eTeams app.

1. Click the eTeams app in the Teams command column, and select the eCloud Soft Keys tab. The default value for Presence Monitoring is "OFF", as displayed in Figure 29.

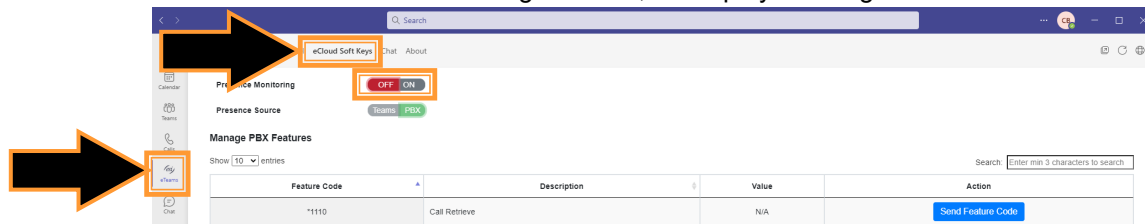


Figure 30: eTeams eCloud Soft Keys Panel

2. To activate Presence Monitoring, the user clicks the gray ON of the OFF/ON capsule
3. The eTeams App sends the request to the Teams platform via the eTeams Connector, and when all items are configured properly, the indicator for ON turns green (and OFF turns gray)

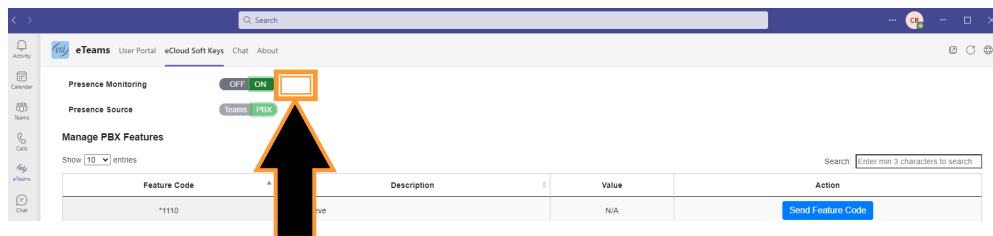


Figure 31: eTeams with Presence Monitoring Active

4. The eTeams App sends the request to the Teams platform via the eTeams Connector, and when all items are configured properly, the indicator for ON turns green (and OFF turns gray)
5. This user can now see who is available and who is not. Figure 31 on the next page contains a list of users with different Presence values at this moment on the eCloud:

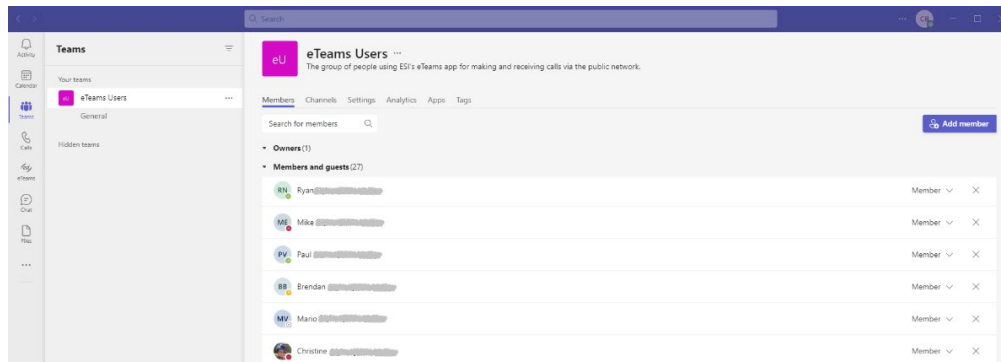


Figure 32: ESI eCloud Presence Values for Users

The following table illustrates the presence values for those users in Figure 31.

Name of eTeams User	Presence Status from eCloud
Ryan	Available
Mike	Do not disturb
Paul	Available
Brendan	Away
Mario	Offline
Christine	In a call

The user can also hover their cursor over the indicator to see the presence value popup as a tooltip.