



ShoreTel Trunk Side Integration Guide

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SHORETEL TRUNK SIDE INTEGRATION

ABOUT THIS GUIDE

This manual, *ShoreTel Trunk Side Integration*, explains how to configure an OAISYS recording solution to record calls via trunks, while obtaining CTI data from ShoreTel. It enables people, teams, and organizations to capture greater insight into their phone-based interactions, providing more efficient management of their overall business operations.

INTENDED AUDIENCE

The information provided in this manual is written for experienced technical support representatives and IT/Networking administrators. Users should be familiar with ShoreTel terminology and programming procedures.



REQUIREMENTS

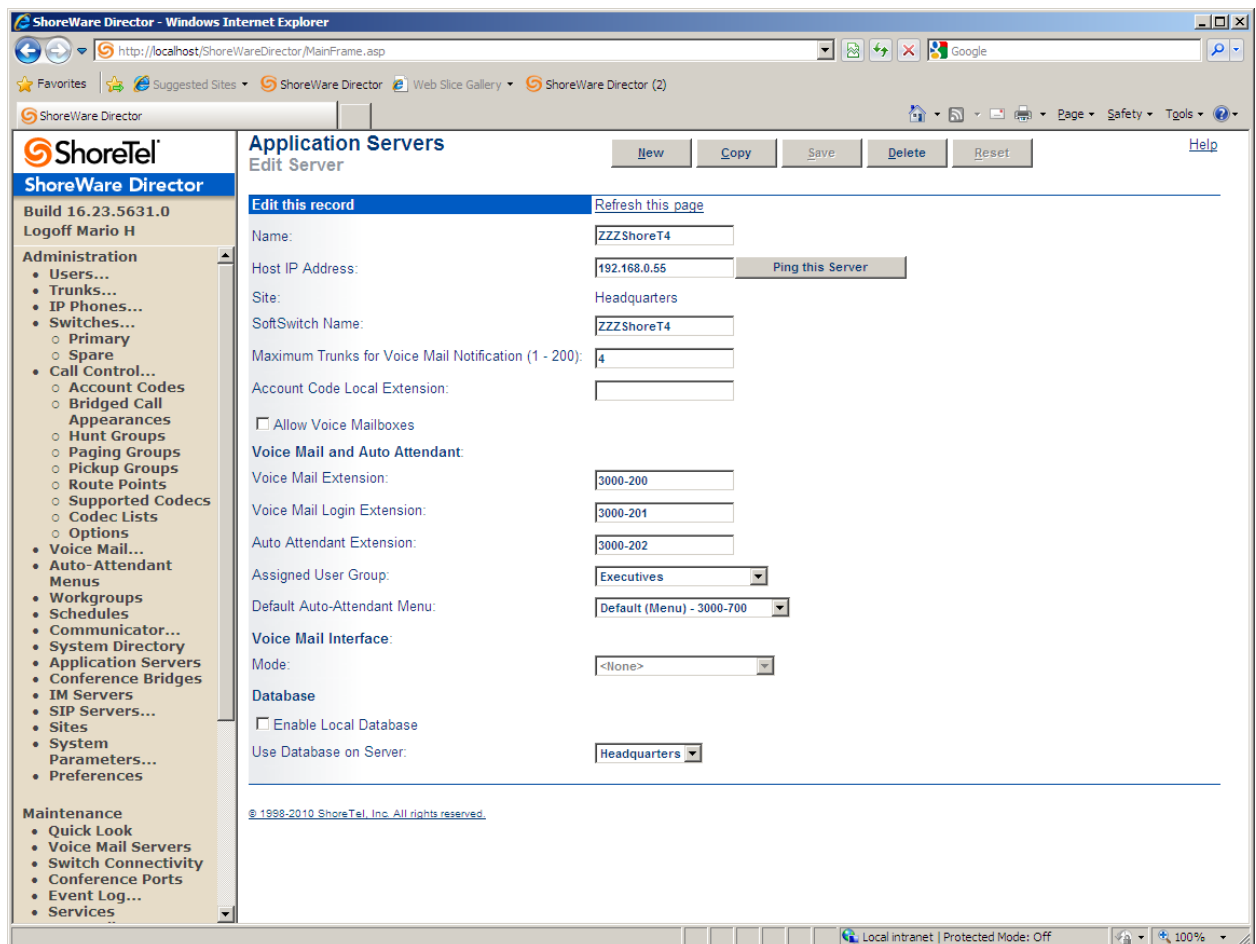
- Windows Server 2008
 - If running ShoreTel versions 9.x, the ShoreTel HQ Operating System MUST be running the same version OS as the OAISYS Server
- Verify all Windows Audio Devices are disabled
 - Window Audio Device is accessible through the Device Manager
- ShoreTel trunk descriptions (IDs) MUST be unique, i.e. no duplicate extension IDs
- We do not record internal (intercom or station-to-station) calls through this integration
 - This is a limitation of any trunk side solution, as internal calls are not routed through the trunks

1. Install the ShoreTel DVM software on the OAISYS Server
 - a. You can access the ShoreWare Remote Server software directly from the main ShoreTel HQ server by directing your browser to (for ShoreTel 10.2 and prior)

<http://servernameoripaddress/shorewaredirector/remotinstall>

For ShoreTel 11.x to current, please download from the ShoreTel website

2. Add an Application Server in ShoreTel programming for OAISYS



3. Configure the trunk IDs
 - a. Each trunk ID (description) MUST be unique, numerical, and five (5) digits



or less for each trunk

For example: On a PRI, the trunk channels (1-23) could be labeled as 9401-9423 (See “Description” field in the screen shot below)

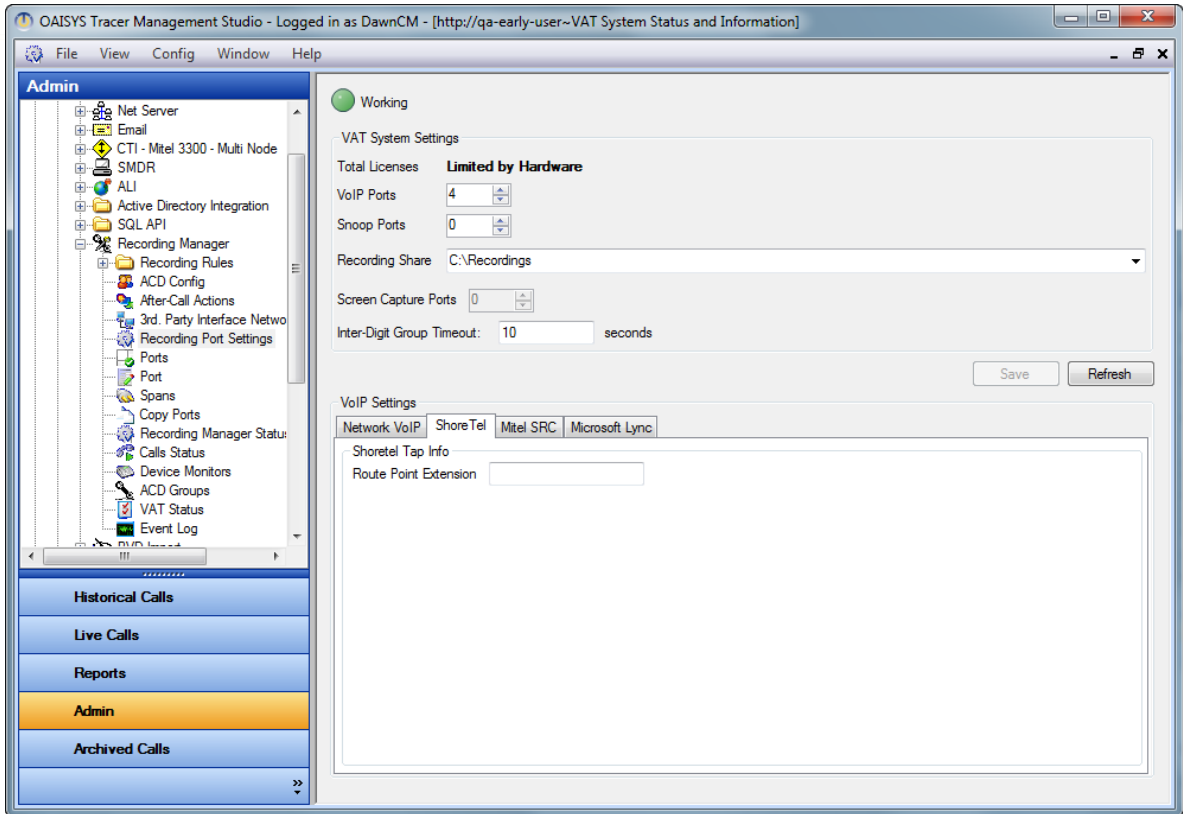
- b. Once trunk IDs have been created/modified, the ShoreTel TMS service MUST be restarted in order for trunk monitoring to occur

The screenshot shows the ShoreWare Director web interface in Internet Explorer. The main content area is titled 'Switches' and 'Edit ShoreGear T1 Switch'. It contains various configuration fields for a switch, including Name, Description, Site, IP Address, Ethernet Address, and Layer 3/1 settings. Below the configuration fields is a table of trunk channels.

Channel	Port Type	Trunk Group	Description	Jack Number	Tx Gain (dB)	Rx Gain (dB)
1	Trunk	PRI Trunk Group	9201		0	0
2	Trunk	PRI Trunk Group	9202		0	0
3	Trunk	PRI Trunk Group	9203		0	0
4	Trunk	PRI Trunk Group	9204		0	0
5	Trunk	PRI Trunk Group	9205		0	0
6	Trunk	PRI Trunk Group	9206		0	0
7	Trunk	PRI Trunk Group	9207		0	0
8	Trunk	PRI Trunk Group	9208		0	0
9	Trunk	PRI Trunk Group	9209		0	0

OAISYS SETUP

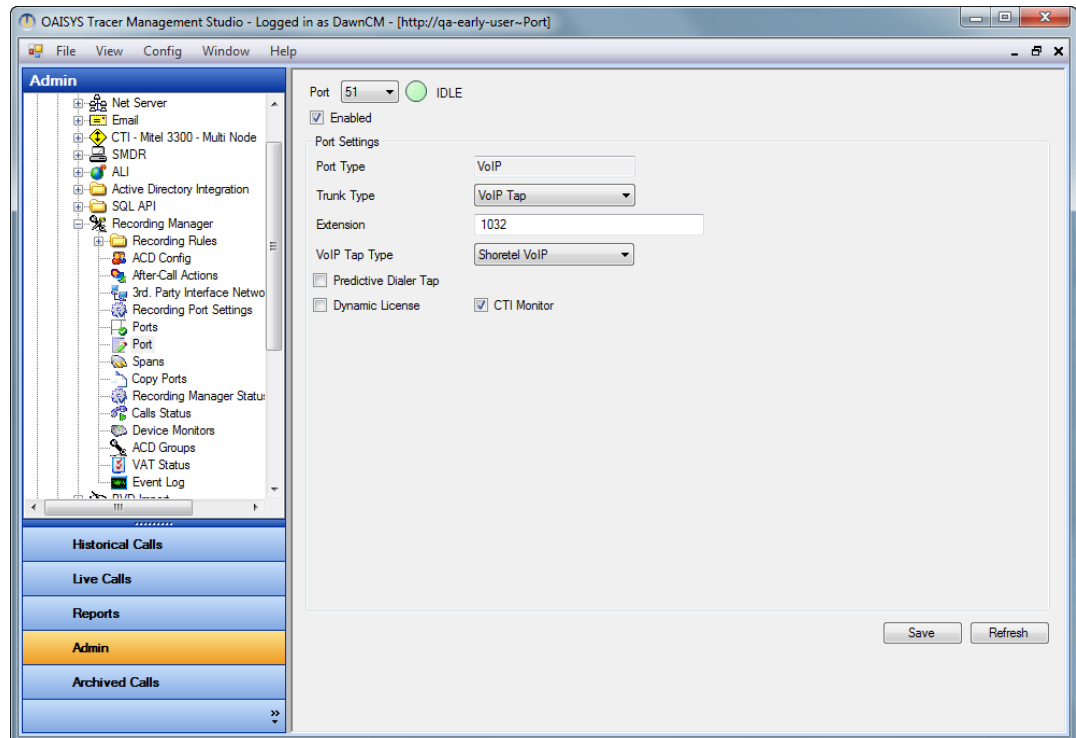
1. Enable and start the ShoreTel Level2 service from Windows Services



The screenshot shows the OAISYS Tracer Management Studio application window. The title bar reads "OAISYS Tracer Management Studio - Logged in as DawnCM - [http://qa-early-user-VAT System Status and Information]". The interface is divided into several sections:

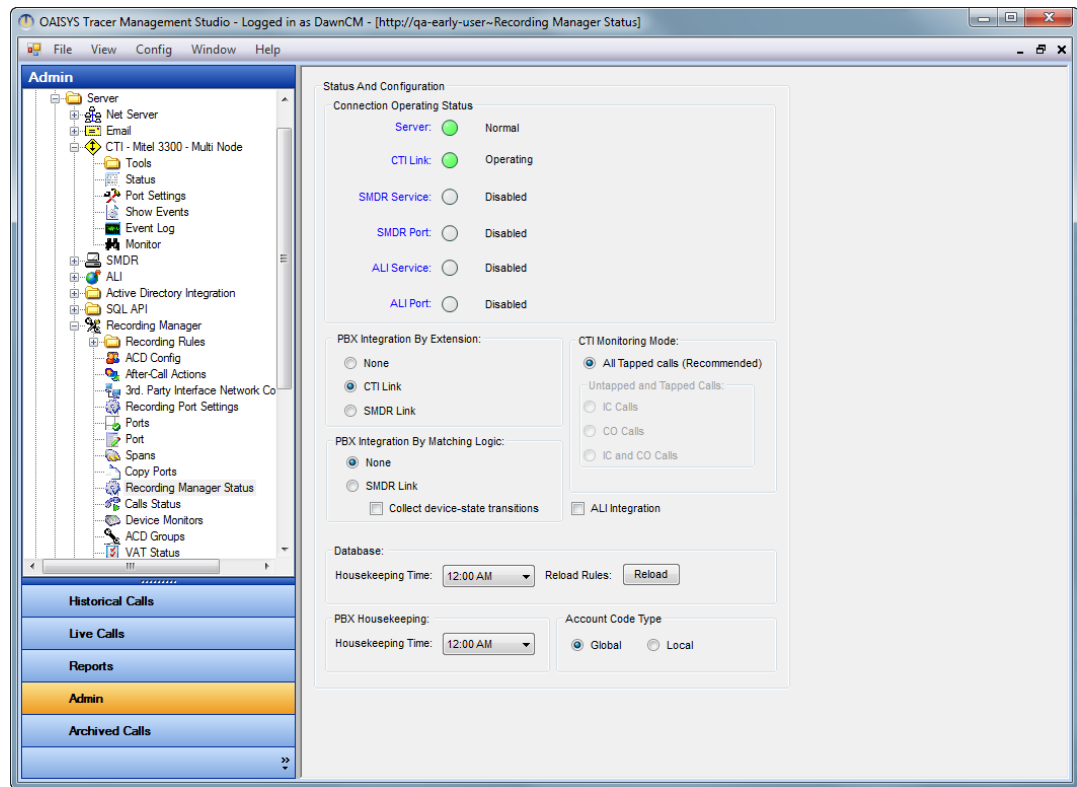
- Admin Panel (Left):** A tree view containing various system components such as Net Server, Email, CTI - Mitel 3300 - Multi Node, SMDR, ALI, Active Directory Integration, SQL API, Recording Manager, Recording Rules, ACD Config, After-Call Actions, 3rd. Party Interface Netwo, Recording Port Settings, Ports, Port, Spans, Copy Ports, Recording Manager Status, Calls Status, Device Monitors, ACD Groups, VAT Status, and Event Log. Below the tree are buttons for Historical Calls, Live Calls, Reports, Admin (highlighted), and Archived Calls.
- Main Content Area:**
 - A green "Working" status indicator.
 - VAT System Settings:** Includes "Total Licenses" (Limited by Hardware), "VoIP Ports" (4), "Snoop Ports" (0), "Recording Share" (C:\Recordings), "Screen Capture Ports" (0), and "Inter-Digit Group Timeout" (10 seconds). "Save" and "Refresh" buttons are present.
 - VoIP Settings:** Features tabs for Network VoIP, ShoreTel, Mitel SRC, and Microsoft Lync. The "ShoreTel" tab is active, showing "Shoretel Tap Info" and a "Route Point Extension" input field.

2. Launch the OAISYS Management Studio to complete configuration
 - a. Select Recording Manager → Port



- b. Enter trunk IDs (which were programmed in the Shoreware Director)
- c. Click Save after entering each trunk extension → then select the next port to be programmed from the drop-down menu in the upper left side of the screen
- d. Verify that OAISYS is in CTI mode, and that the ShoreTel CTI Service can see the calls

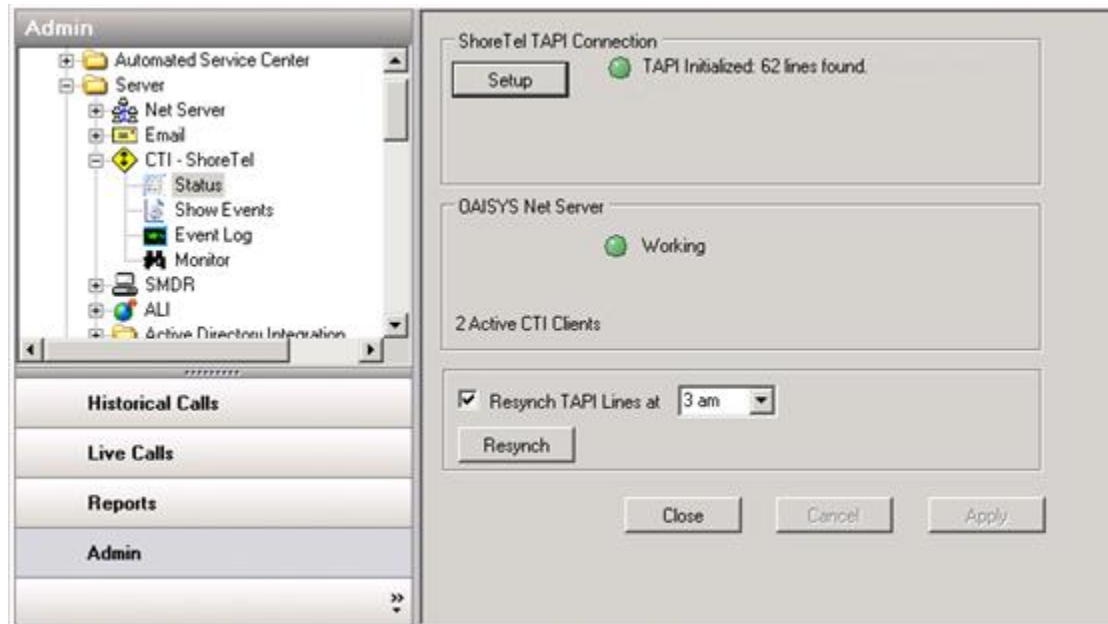
e. Under Recording Manager → select Status



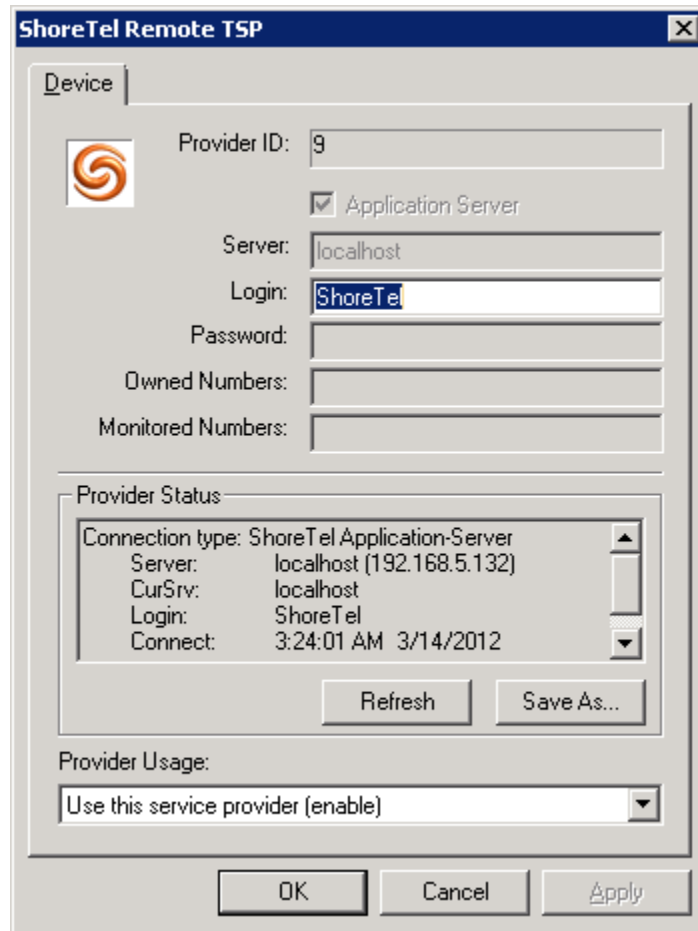
f. Verify that the PBX Integration Link is selected on CTI

i. Verify the CTI radio light is green

3. Expand the CTI ShoreTel and check the Status
 - a. The ShoreTel TAPI Connection and Net Server radio lights should be green, and there should be XX lines found (XX value varies)



b. If clicking on setup from here, this screen should appear:



The image shows a Windows-style dialog box titled "ShoreTel Remote TSP". It contains several input fields and a status section. The "Device" tab is selected. The "Provider ID" is set to "9". The "Application Server" checkbox is checked. The "Server" is set to "localhost", "Login" is "ShoreTel", and "Password" is empty. "Owned Numbers" and "Monitored Numbers" are also empty. The "Provider Status" section shows connection details: "Connection type: ShoreTel Application-Server", "Server: localhost (192.168.5.132)", "CurSrv: localhost", "Login: ShoreTel", and "Connect: 3:24:01 AM 3/14/2012". There are "Refresh" and "Save As..." buttons below this section. The "Provider Usage" dropdown is set to "Use this service provider (enable)". At the bottom are "OK", "Cancel", and "Apply" buttons.

Field	Value
Provider ID	9
Application Server	<input checked="" type="checkbox"/>
Server	localhost
Login	ShoreTel
Password	
Owned Numbers	
Monitored Numbers	

Provider Status:

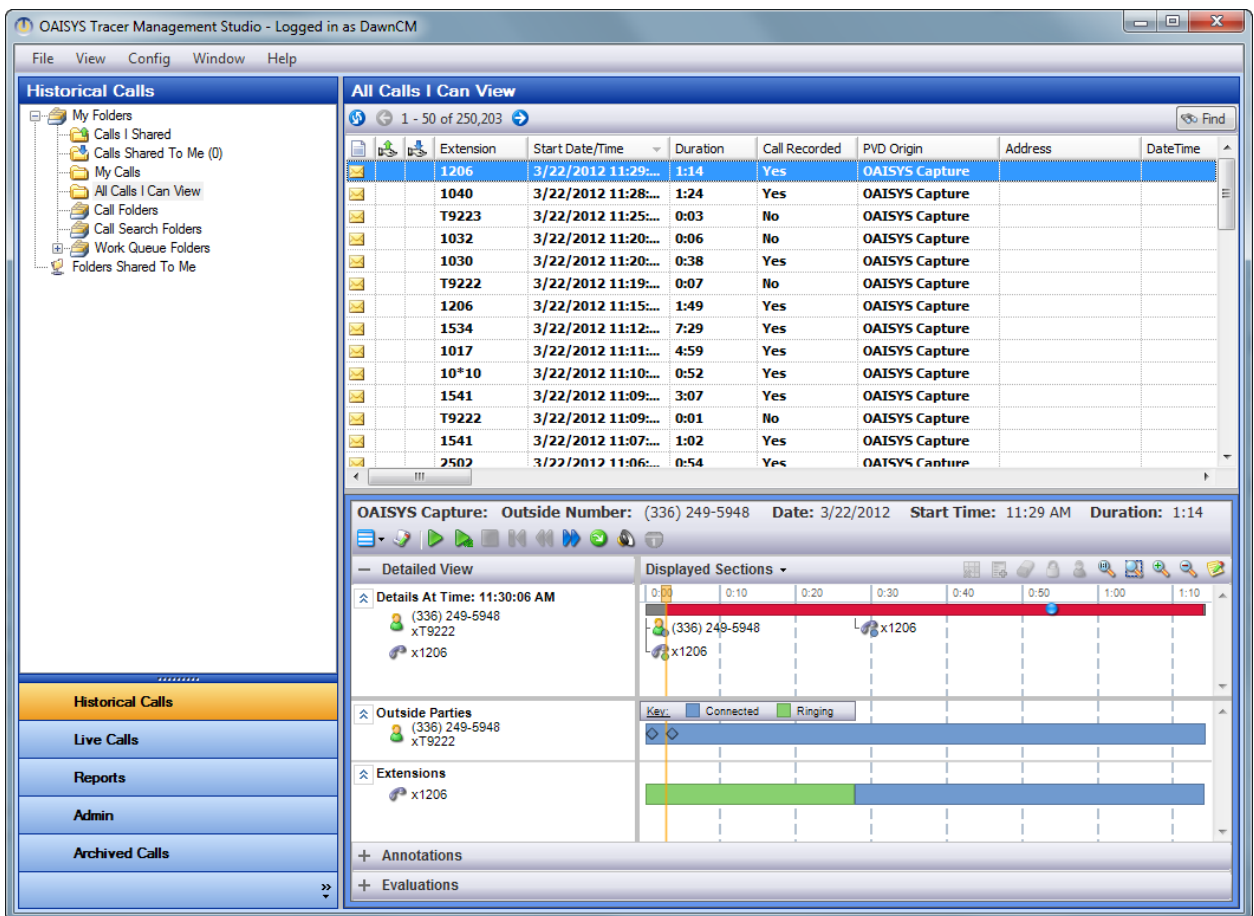
Connection type:	ShoreTel Application-Server
Server:	localhost (192.168.5.132)
CurSrv:	localhost
Login:	ShoreTel
Connect:	3:24:01 AM 3/14/2012

Provider Usage:

Use this service provider (enable)

TESTING TRUNK SIDE CALL RECORDING

1. Log into OAISYS Management Studio as a user that has access to All Calls
2. Make a test call from one of the tapped trunks to an outside number and speak on the call for 30 seconds or more to ensure sufficient time to hear both parties on the call
3. Refresh the All Calls I can View folder, and the call you made will appear there
4. Click on the green play button to play the call
 - a. Remember, the computer MUST have a sound card and speakers/headphones connected to hear the call



The screenshot shows the OAISYS Tracer Management Studio interface. The main window is titled "All Calls I Can View" and displays a table of call records. The table has columns for Extension, Start Date/Time, Duration, Call Recorded, PVD Origin, Address, and DateTime. Below the table, there is a detailed view of a specific call, showing the call duration and a timeline of events.

Extension	Start Date/Time	Duration	Call Recorded	PVD Origin	Address	DateTime
1206	3/22/2012 11:29:...	1:14	Yes	OAISYS Capture		
1040	3/22/2012 11:28:...	1:24	Yes	OAISYS Capture		
T9223	3/22/2012 11:25:...	0:03	No	OAISYS Capture		
1032	3/22/2012 11:20:...	0:06	No	OAISYS Capture		
1030	3/22/2012 11:20:...	0:38	Yes	OAISYS Capture		
T9222	3/22/2012 11:19:...	0:07	No	OAISYS Capture		
1206	3/22/2012 11:15:...	1:49	Yes	OAISYS Capture		
1534	3/22/2012 11:12:...	7:29	Yes	OAISYS Capture		
1017	3/22/2012 11:11:...	4:59	Yes	OAISYS Capture		
10*10	3/22/2012 11:10:...	0:52	Yes	OAISYS Capture		
1541	3/22/2012 11:09:...	3:07	Yes	OAISYS Capture		
T9222	3/22/2012 11:09:...	0:01	No	OAISYS Capture		
1541	3/22/2012 11:07:...	1:02	Yes	OAISYS Capture		
2502	3/22/2012 11:06:...	0:54	Yes	OAISYS Capture		

The detailed view shows the call duration and a timeline of events. The call is identified as "OAISYS Capture: Outside Number: (336) 249-5948 Date: 3/22/2012 Start Time: 11:29 AM Duration: 1:14". The timeline shows the call starting at 11:30:06 AM and ending at 11:31:20 AM. The call is shown as a red bar, indicating it was captured. The timeline also shows the call being connected and ringing.



We recommend using the OAISYS Installation Guide to review the configuration and setup of the Recording Server:

http://www.oaisys.com/downloads/OAISYS_Installation_Configuration_Guide_2011.pdf

We also have training available to help use, understand, and admin the server. Please see our training website for available options:

<http://www.oaisys.com/tracer7presentations.aspx>

If Technical Assistance is required, please call 888-496-9040, Option 4 for Support.