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

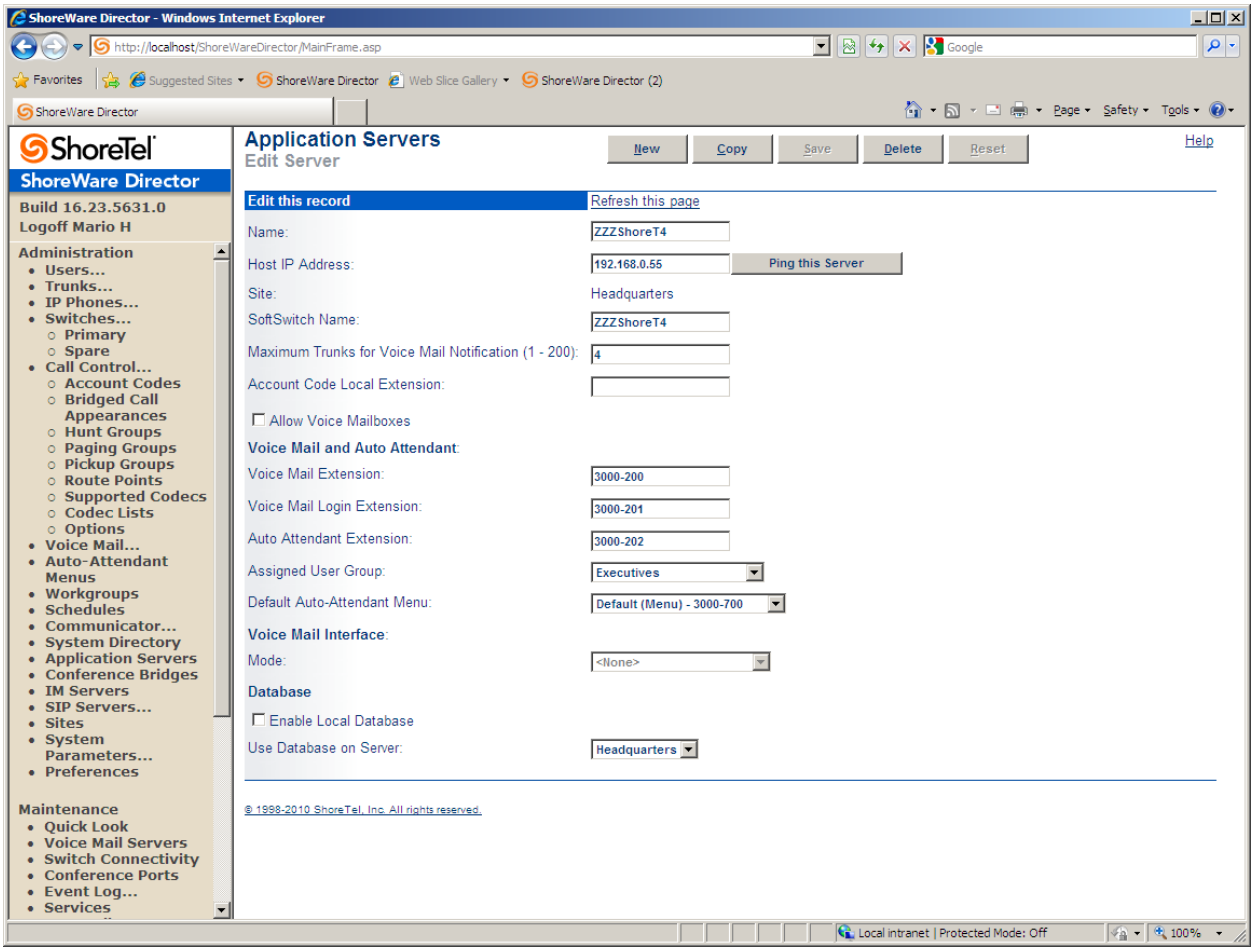
The information provided in this manual is written for experienced technical support representatives and IT/Networking administrators. Users should be familiar with ShoreTel terminology and programming procedures.

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

2. Add an Application Server in ShoreTel programming for OAISYS

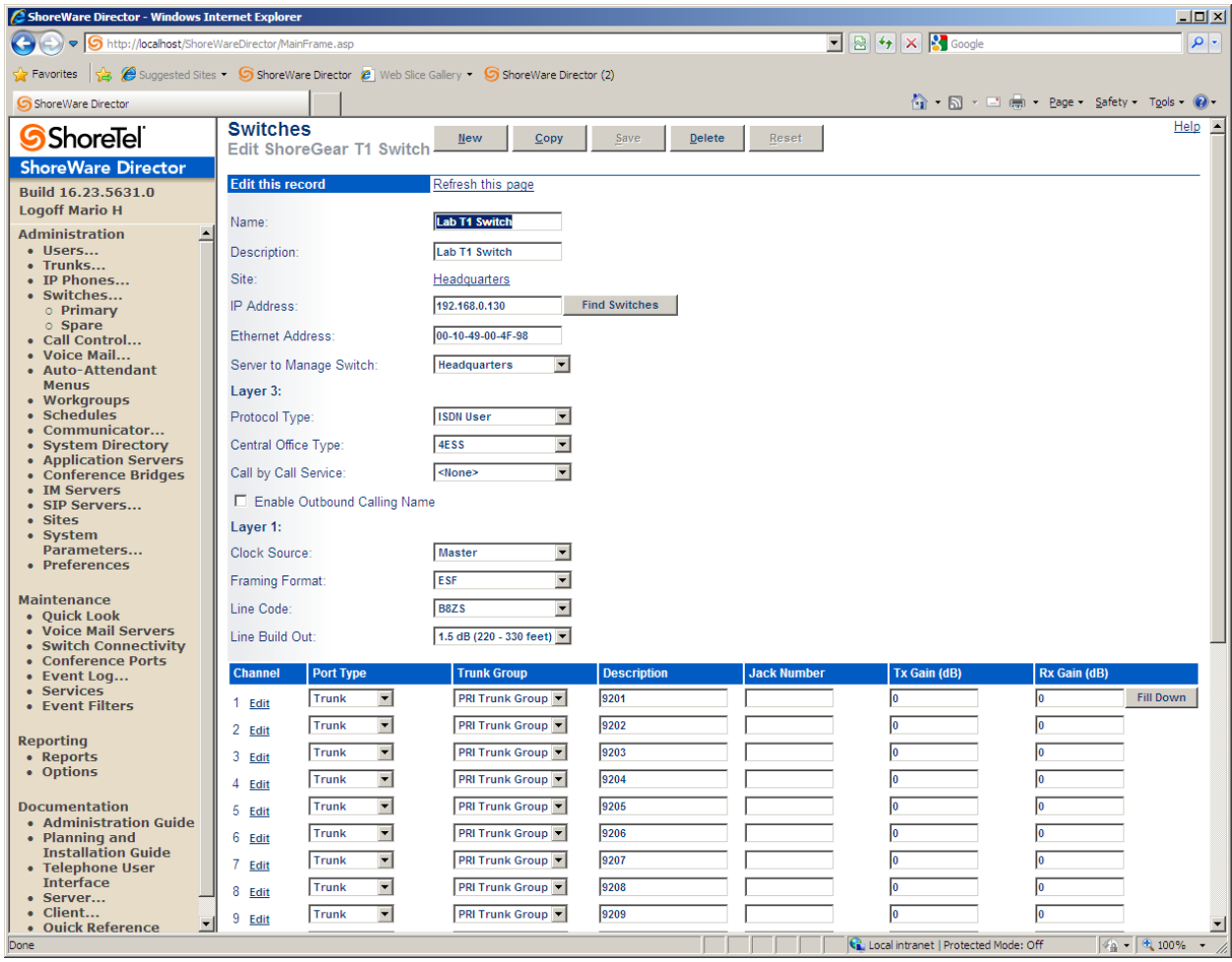


3. Configure the trunk IDs
    a. Each trunk ID (description) MUST be unique, numerical, and five (5) digits

or less for each trunk

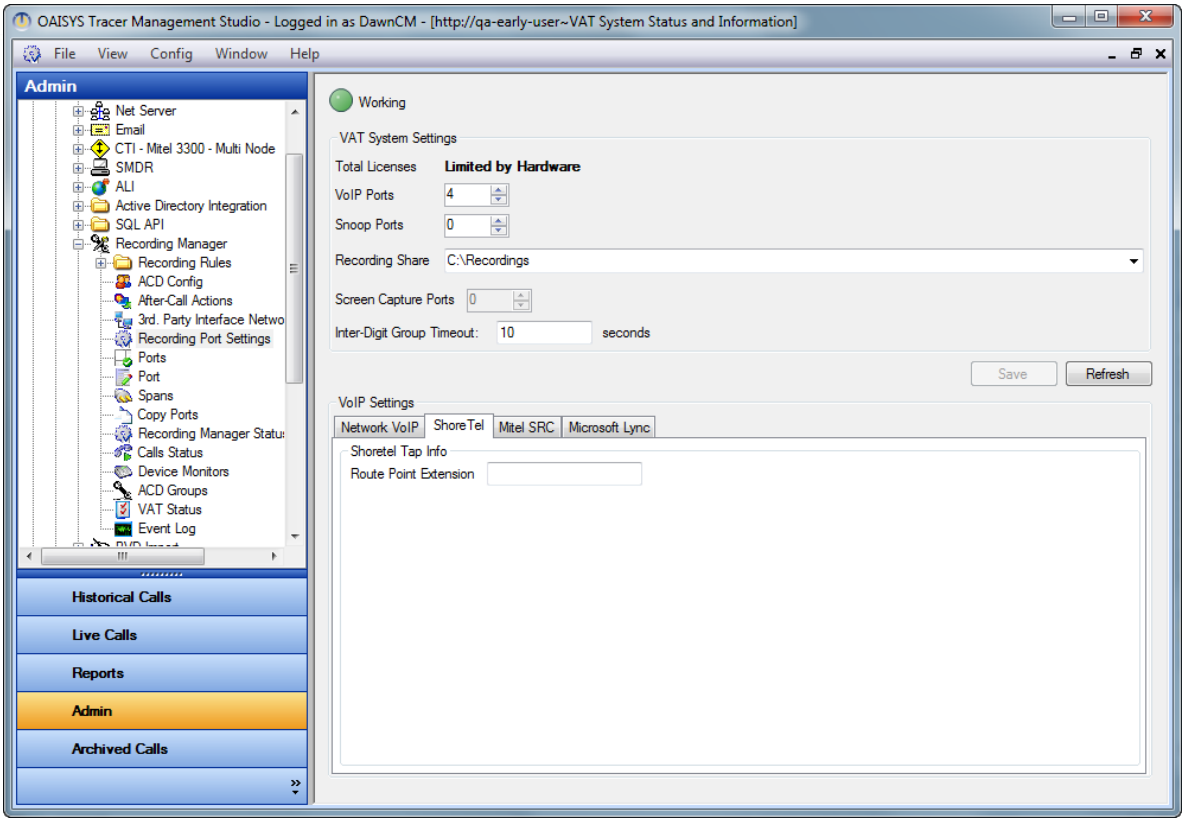
For example: On a PRI, the trunk channels (1-23) could be labeled as 9401-9423 (See “Description” field in the screen shot below)

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

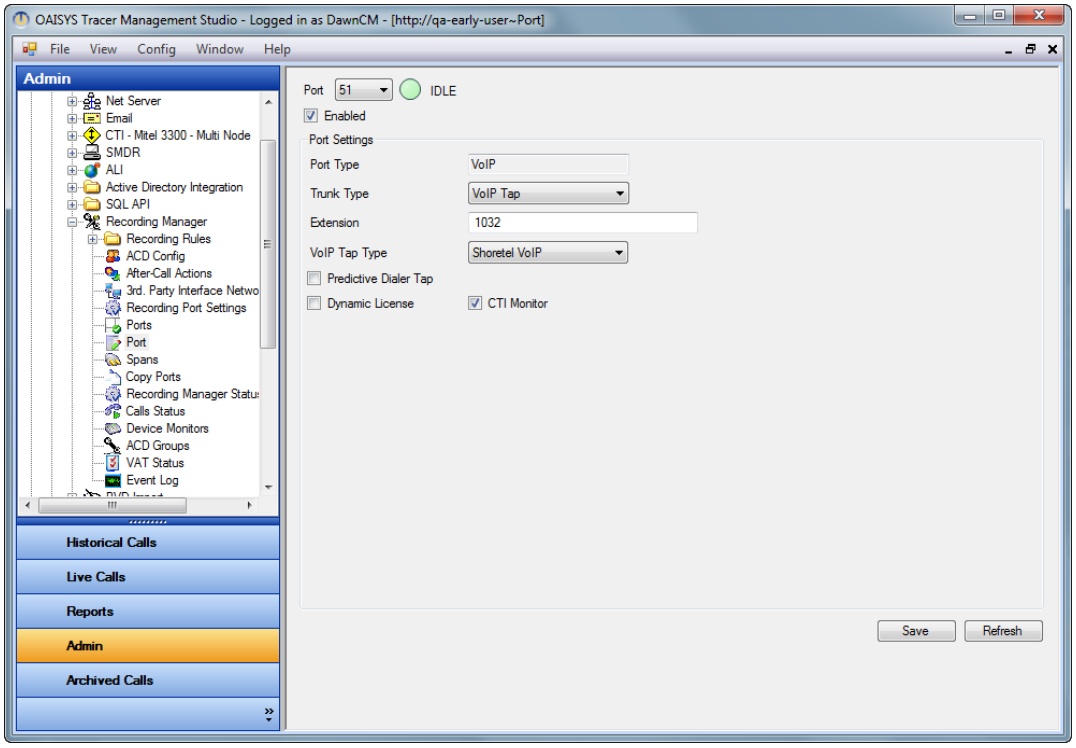


OAISYS SETUP

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

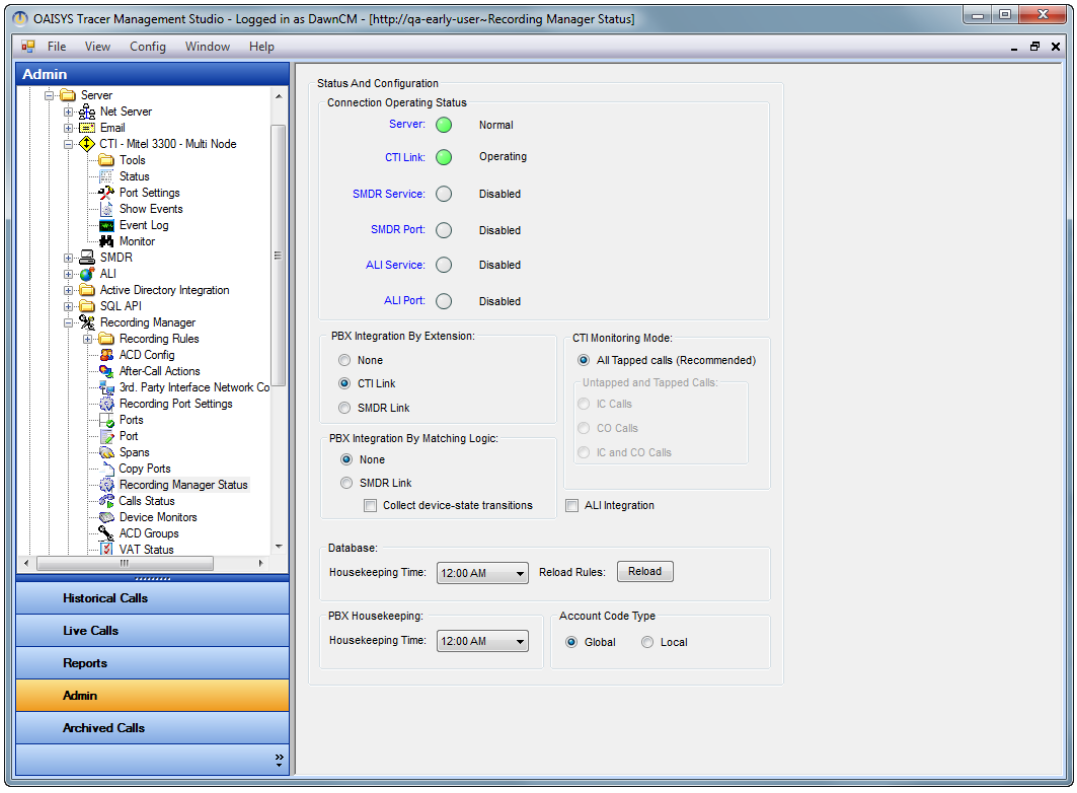

OAISYS Tracer Management Studio - Logged in as DawnCM - [http://qa-early-user~VAT System Status and Information]
File
View
Config
Window
Help
Admin
Net Server
Email
CTI - Mitel 3300 - Multi Node
SMDR
ALI
Active Directory Integration
SQL API
Recording Manager
Recording Rules
ACD Config
After-Call Actions
3rd. Party Interface Netwo
Recording Port Settings
Ports
Port
Spans
Copy Ports
Recording Manager Status
Calls Status
Device Monitors
ACD Groups
VAT Status
Event Log
Historical Calls
Live Calls
Reports
Admin
Archived Calls
Working
VAT System Settings
Total Licenses
Limited by Hardware
VoIP Ports
4
Snoop Ports
0
Recording Share
C:\Recordings
Screen Capture Ports
0
Inter-Digit Group Timeout:
10
seconds
Save
Refresh
VoIP Settings
Network VoIP
ShoreTel
Mitel SRC
Microsoft Lync
Shoretel Tap Info
Route Point Extension

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

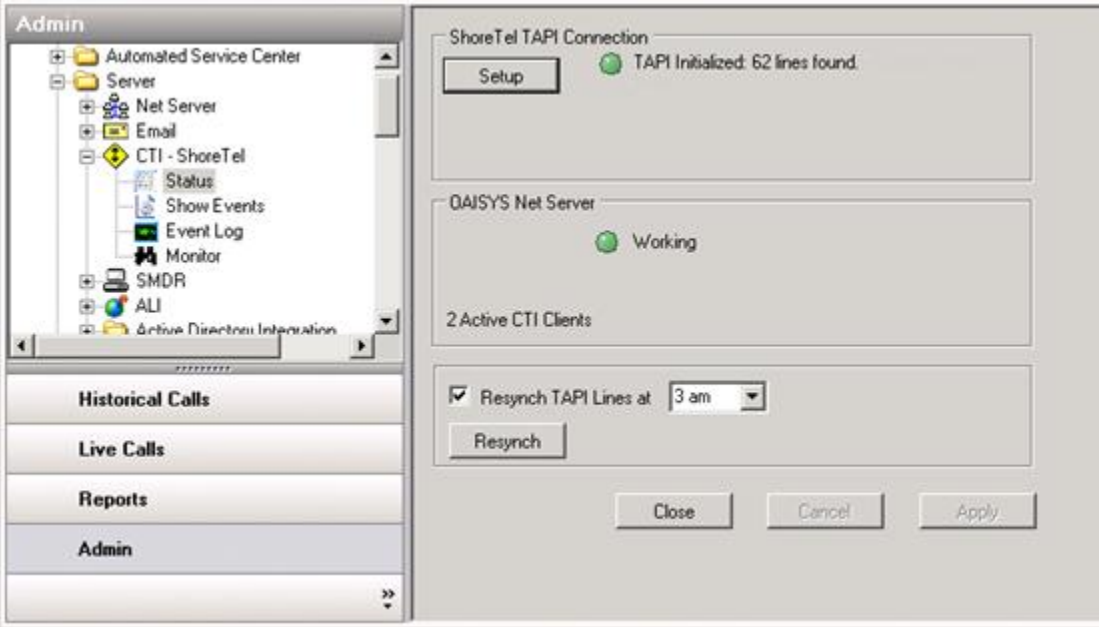
e. Under Recording Manager → select Status



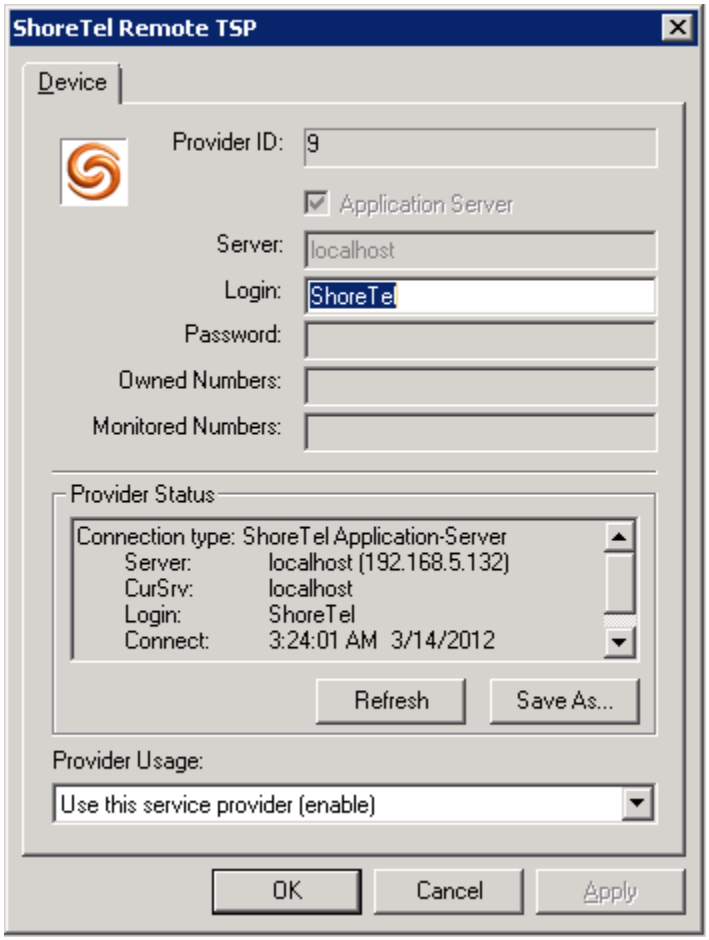
f. Verify that the PBX Integration Link is selected on CTI

   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)

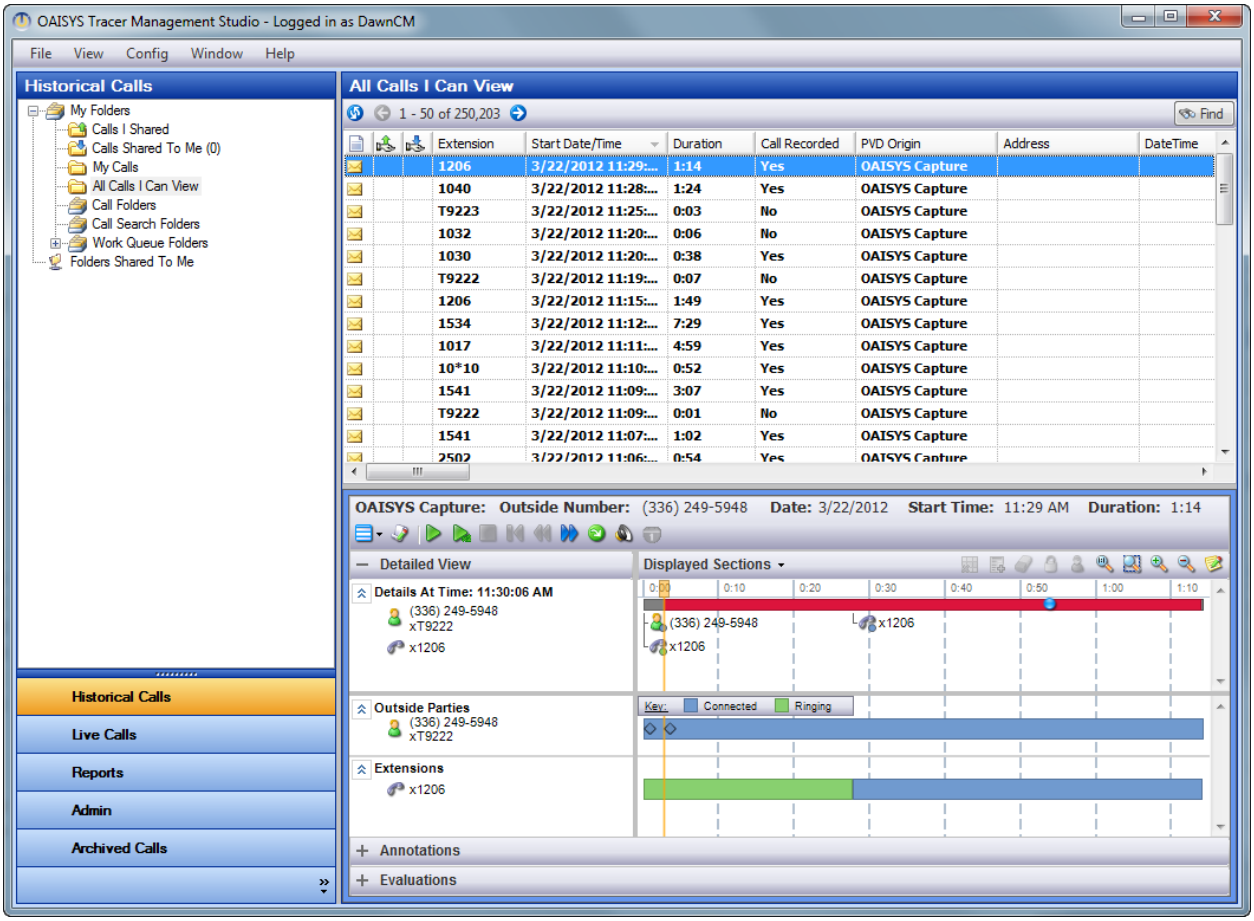


b. If clicking on setup from here, this screen should appear:



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



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.