SHORETEL
COMPATIBILITY GUIDE

TelStrat's Engage Contact Center Suite provides business and contact center users the affordable, flexible tools they need for call recording, workstation screen capture, quality management, desktop analytics, speech analytics and/or workforce management. Engage Suite is compatible with a wide range of PBX platforms, telephony technologies, and flexible deployment environments.

Product Features:

- Full call recording automatically, according to user-defined rules, or on-demand.

- Live monitoring of calls & desktop activity for one or multiple simultaneous stations until monitoring session is closed.

- Recorded audio files can be playbacked, downloaded as .MP3 or .WAV, emailed as a file attachment or playable URL, or even played back directly from a customer's CRM application.

- All call information is stored and searchable. Add user-defined fields to call records from 3rd-party CRM applications, such as customer ID or policy number.

- PCI-DSS, HIPAA, FIPS, and other regulatory compliance program requirements with auto pause/resume.

Technical Capabilities:

- Multi-tenant capabilities for easy administration and centralized management of multiple tenants from a single logon.

- High availability solutions supporting virtual server or physical server deployments.

- Scalable solutions to over 10,000 endpoints.

- Rock-solid security and recording integrity with watermarked audio files, SSL/HTTPS Web access, and optional AES 256-bit encryption.

- Archiving solutions supports SAN, NAS, and attached storage.

- Web services integration supports flow-through provisioning, call notifications, call download, call annotations, and more. Sample applications, source code, and executable files provided.

- On-Premise or Cloud deployments available.

- Cloud subscription deployment options include service providers' data center, TelStrat's data center, or hybrid on-premise/cloud

SUPPORTED INTEGRATIONS

- ShoreWare Core Software v.10.1 or later
- ShoreWare TAPI Application Server
- Digital Trunking Switches
- BRI Trunking Switches
- Analog Trunking Switches
- Analog Extensions
- ShoreTel VPN Concentrator
- ShoreTel InGate SIParator
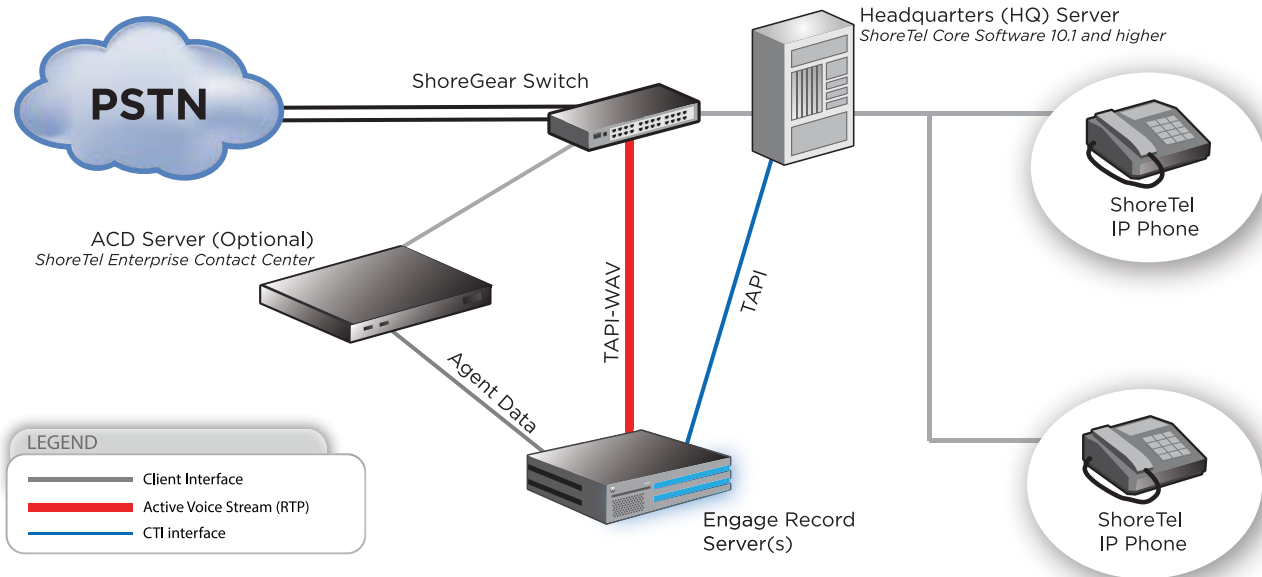- ShoreTel Conference Bridge
- ShoreTel IP phones

ShoreTel
Innovation Network
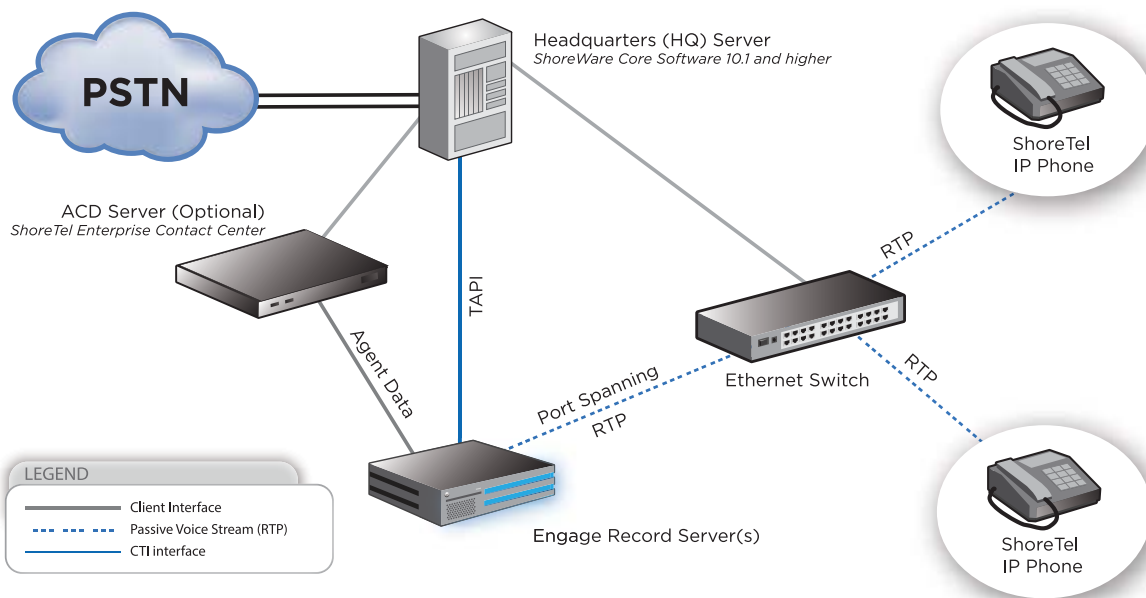
Network Architecture Details

TAPI-WAV

A direct copy of the audio is sent from the ShoreGear Switch to the Engage Record Server through a TAPI-WAV port. The ShoreTel TAPI client obtains all call event data such as call start, call end, dialed digits, etc. The ShoreTel TAPI-WAV method records all inbound and outbound calls at the ShoreGear Switch, as a result station-to-station calls cannot be recorded. This recording method uses ShoreTel TAPI-WAV ports to record phone calls.

Headquarters (HQ) Server
ShoreTel Core Software 10.1 and higher

ShoreGear Switch

PSTN

ACD Server (Optional)
ShoreTel Enterprise Contact Center

ShoreTel IP Phone

ShoreTel IP Phone

TAPI-WAV

TAPI

Agent Data

Engage Record Server(s)

LEGEND
- Client Interface
- Active Voice Stream (RTP)
- CTI interface

Port Spanning with TAPI

All phones to be recorded are "spanned" to a single contact point on the network where the Engage Record Server connects. A second NIC in the Engage Record Server is connected to the ShoreTel TAPI for call detail information. This method can also be configured to record station-to-station calls or redundant servers.

PSTN

Headquarters (HQ) Server
ShoreWare Core Software 10.1 and higher

ACD Server (Optional)
ShoreTel Enterprise Contact Center

ShoreTel IP Phone

TAPI

Agent Data

Port Spanning
RTP

RTP

Ethernet Switch

RTP

Engage Record Server(s)

ShoreTel IP Phone

LEGEND
- Client Interface
- Passive Voice Stream (RTP)
- CTI interface

Mixed Recording Methods on the Same Server

Customers may want to combine TAPI-WAV and Port Spanning for any of the following reasons:

• Record station-to-station calls for archiving and review

• Duplicate recordings for redundancy

• Ensure maximum audio quality by capturing the active voice stream

Since all recording methods are subject to the events received on the ShoreTel TAPI, they can both be recorded on the same Engage Suite Server including phones using different codecs. Any IP phones that are supported by the ShoreTel IP Phone System can be recorded.
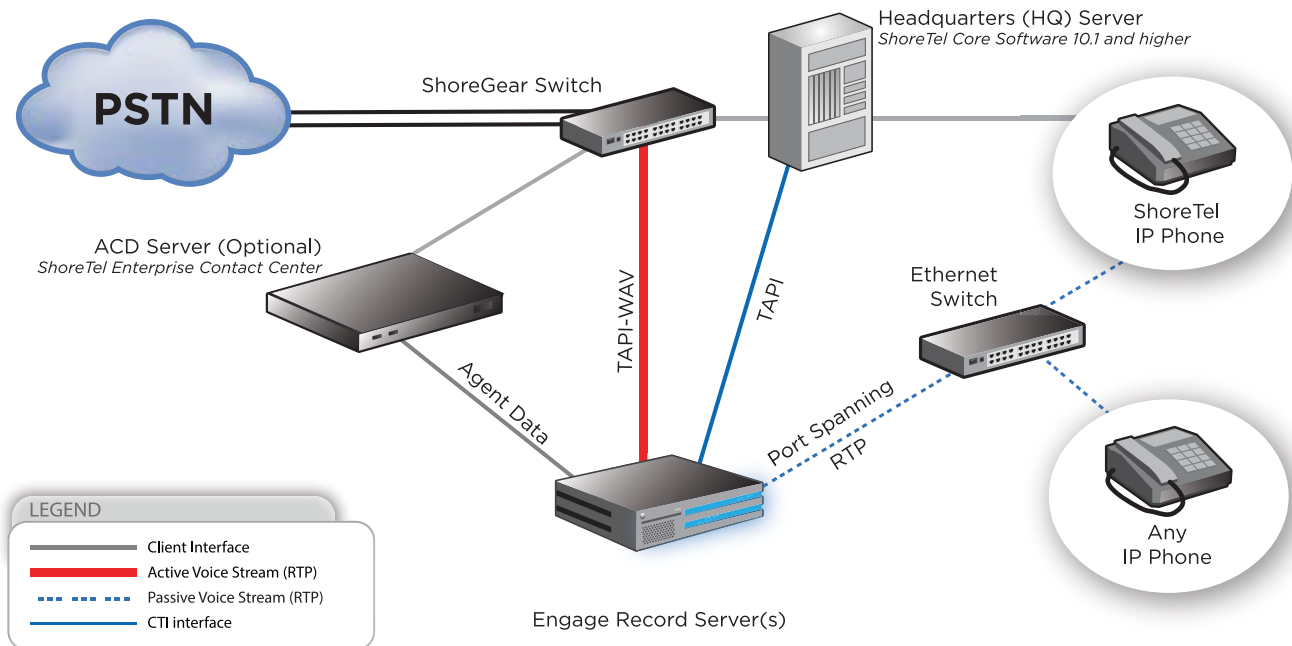
Security Features

Engage Suite secures all Web-based data & communication using Secure Sockets Layer (SSL)/HTTPS. Microsoft® Single Sign-On (SSO) and Active Directory integration provide robust user access control to satisfy corporate security requirements, with no need to logon multiple times.

To comply with regulatory security requirements, audio files can be watermarked to ensure the recording's authenticity and the included SDK allows third-party integration to stop/start recordings, protecting sensitive data. An available, affordable security package provides end-to-end encryption for all recorded calls and screen captures.

DETAILS

Engage Server Requirements:

- **Engage Record server application software** and any additional packages purchased.

- **Windows Server 2012, 2008 (32 bit or R2) or 2012** supports up to 1,000 concurrent stations. A R2 64-bit server can be used if the ShoreTel Software is Release 11.0 or higher. A 2012 Standard server can be used if the ShoreTel Software is Release 14.1 or higher.

- **Microsoft SQL Server 2012, 2008, or 2005** Express, Workgroup, Standard, or Data Center database applications supported.

- Optional **RAID 1, 5, or 10** configured internal hard drive, which is recommended for resiliency.

- **ShoreTel TAPI SDK installation** to communicate with the ShoreTel Server. ShoreTel TAPI SDK cannot be configured with a Windows 7 operating system.

- **Two (2) NIC ports** are recommended to separate the voice network from the data network.

A simple installation of Engage Suite will have call recording implemented in as little as one (1) day. Engage supports mixed environments of SIP, VoIP, TDM, analog, and radio voice technologies. Customers migrating from other PBX platforms to ShoreTel can record multiple voice technologies or platforms on a single server simultaneously.

ShoreTel Integration Requirements:

- A **ShoreTel IP Phone System Release 10.1 and higher,** that includes a Headquarters or Distributed Voice Server, ShoreGear Switches, ShoreTel Core Software, and TAPI/TAPI-WAV Services.

- A **ShoreTel TAPI Application Server license** for each Engage Suite Server.

- Any **ShoreTel IP phone** is supported including SIP phones.

- **Enterprise Contact Center** is not required but is supported to obtain the Agent ID.

- **Layer 2 Ethernet switch(es)** with switch port analyzer (SPAN) capabilities.

TAPI-WAV Method:

TAPI-WAV provides a no spanning solution through active trunk-side recording. This recording method uses ShoreTel TAPI-WAV ports to record phone calls. Each call desired to be recorded will be sent directly to the Engage Record Server using a configured IP address.

Since each ShoreTel IP telephone can be configured for only one (1) recording port, recordings of each IP phone will be directed to one (1) Engage Server. Should your network require multiple Engage Servers, each phone recording will be directed to only one of the servers.

For redundant or high-availability networks, Engage Servers are easily integrated into a Microsoft Clustering solution.

Port Spanning with TAPI:

The port spanning or mirroring method is ideal for networks requiring station-to-station recording. Using the correct network configuration, station-to-station calls can be recorded to verify critical voice communications or simply pinpoint inefficiencies.

For redundant or high availability networks, two (2) Engage Servers can be configured to monitor the same telephone.