

### SHORETEL INSTALLATION GUIDE

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### Install Java

Chronicall runs on the Java platform. Download and install Java onto the server where Chronicall will be installed. This must be an Oracle based Java (available at www.java.com) and it must be 32-bit.



### Install Chronicall

Download Chronicall Setup onto the server where Chronicall will be installed. Chronicall must be installed on the HQ server or on a DVS server (Note: DVS is preferred. If Chronicall is installed on the HQ server you may be asked to remove it and re-install on a DVS server). Once downloaded, run the installer as an Administrator. The file will do a check for Java and then the following Chronicall Setup screen will appear. Note that it may take a few minutes for the Chronicall Setup window to appear.

Follow these steps:



Click Next to start the installation.

Ē.	Chronicall Setup	<b>– – ×</b>
Chronicall Setup	Ø	XIMA
End User Lisence Agreement		
Please read the following License A before continuing with the installati	greement. You must accept the te on.	rms of this agreement
END-USER LICENSE AG	REEMENT	^
IMPORTANT-READ CAREFULLY: Th between you (either an individual or product identified above, which inclu printed materials, and "online" or elec addendum to this EULA may accomp TERMS OF THIS EULA BY INSTA PRODUCT. IF YOU DO NOT AGRE	is End-User License Agreement ("EUL a single entity) and Xima, LLC or the udes computer software and may incli- tronic documentation ("Product"). A vany the Product. YOU AGREE TO B LLING, COPYING, OR OTHERWIS EE, DO NOT INSTALL OR USE THE	A") is a legal agreement Xima, LLC software ude associated media, n amendment or E BOUND BY THE E USING THE E PRODUCT. In
• I accept the agreement		
○ I do not accept the agreement		
	Cancel	< Back Next >

Accept the End-User License Agreement. Click Next.

₽ <sup>®</sup>	Chronicall Setup	_ <b>_</b> ×
Chronicall Setup		XIMA
Installation Folder		
Chronicall will be installed in the fol	owing folder.	
To change where Chronicall is insta	lled enter the path below or click "Brows	e"
Folder:		
C:\Program Files (x86)\Xima So	oftware\Chronicall	Browse
	Cancel <	Back Next >

Indicate the directory where you would like to install Chronicall. Click Next.

Ē.	Chronicall Setup	<b>– – X</b>
Chronicall Setup	Õ	XIMA
Register Chronicall		
Chronicall will only log when it is abl your serial key below to register Ch	e to verify its registration with Xim ronicall.	a Software. Please enter
Serial Key:		
Demo Tools		
Chronicall can optionally be installed connection to a phone system. Dem demonstrate Chronicall without a ph	in Demo Mode which allows you to o Mode is used by authorized Xima one system.	o use the software without a Partners who need to
	Install as Demo (	will not capture call data) 🗌
	Cancel	<back next=""></back>

Register your Chronicall by entering the serial key for your installation. Click Next.

🤨 Chronicall Setup	– 🗆 X
Chronicall Setup	
ShoreTel Info	
Chronicall must be installed on either the HQ type is it being installed on?	Server or a TAPI Application Server. Which server
HQ Server     TABL Application Ser	nuer.
HQ Server IP Address:	10.20.30.40
	Cancel < Back Next >

Select which type of server Chronicall is being installed on. If TAPI Application Server is selected, enter the IP address of the HQ Server. Click Next.

🔮 Chronicall Setup	_		$\times$
Chronicall Setup	X	IM	
ECC Info			
Do you have ShoreTel Enterprise Contact Center	(ECC)?		
Yes			
⊖ No			
ECC IP Address: 10.11.12.13			
Cancel	< Back	Ne	xt >

Select whether or not you have a ShoreTel Enterprise Contact Center (ECC). If yes, enter the IP address of the ECC server. Click Next.

12	Chronica	II Setup	<b>– – ×</b>
Chronicall Setup		ð>	
PostgreSQL			
Chronicall stores its data in a Posto should use to communicate with ot credentials indicated below.	reSQL databa her applicatior	se. Please indicate which por is. A database user will be cre	t PostgreSQL eated with the
Post	greSQL port:	9086	
Post	greSQL user:	Chronicall	
PostgreSC	L password:	•••••	
		Cancel < Ba	ck Next >

Define the Settings for the Postgres database (the default settings are already entered - most users do not need to change these settings). Click Next.

Ĕ,	Chronicall Setup	_ <b></b>
Chronicall Setup	Ć	XIMA
Chronicall Webserver		
Chronicall is accessed through a we other applications are using the To port is not free.	eb interface served by Apache T mcat port as you will be unable t	omcat. Please make sure no o access Chronicall if this
Apache	Tomcat Port: 9080	
	Cancel	< Back Next >

Define the web server port for Chronicall's Tomcat web server (the default settings are already entered - most users do not need to change these settings). Click Next.

₿.	Chronicall Setup	_ <b></b>
Chronicall Setup	Ô	XIMA
Ready to Install		
Setup has all of the information ne	cessary to begin installation.	
To begin click the "Install" button.		
	Cancel	< Back Install

Click Install to continue the installation with the configured settings.

During the install you may be prompted to install WinPcap. If not, skip to page 9



#### Click Next.

6	WinPcap 4.1.3 Setup	⊐ X
WinPcap	License Agreement Please review the license terms before installing WinPcap	4.1.3.
Press Page Down to see th	ne rest of the agreement.	
Copyright (c) 1999 - 2005 Copyright (c) 2005 - 2010 Copyright (c) 2010 - 2013 All rights reserved. Redistribution and use in s permitted provided that th	NetGroup, Politecnico di Torino (Italy). CACE Technologies, Davis (California). Riverbed Technology, San Francisco (California). source and binary forms, with or without modification, are ne following conditions are met:	^
<ol> <li>Redistributions of source conditions and the following 2. Redistributions in binary</li> </ol>	ce code must retain the above copyright notice, this list of ng disclaimer. y form must reproduce the above copyright notice, this list o	f 🗸
If you accept the terms of agreement to install WinPc	the agreement, click I Agree to continue. You must accept t ap 4.1.3.	he
Nullsoft Install System v2.46	< Back I Agree C	ancel

Accept the License Agreement by clicking "I Agree".

6	WinPcap 4.1.3 Setup	- 🗆 X
Win Pcap	Installation options Please review the following options before install 4.1.3	ing WinPcap
☑ Automatically start th	e WinPcap driver at boot time	
Nullsoft Install System v2.46 –	< Back Install	Cancel

Ensure that the option to 'Automatically start the WinPcap driver at boot time' is enabled. Click Install.



Click Finish close the WinPcap install.



You will get the Finish Screen once Chronicall has completed the installation. Note the default user name, the default password, and the URL to access Chronicall are provided.

## Complete Initial Configuration

A configuration wizard will appear after you first log into Chronicall. The configuration wizard will prompt you for information required by your installation. Not all of the following steps will apply to every serial key. You will only be prompted in regards to the modules purchased.



Go to the URL provided on the final screen of the installation. This will take you to the Chronicall Login screen. As mentioned on the final screen of the installation, the default user name is 'Administrator' and the default password is 'password'. If your browser does not support Java, you can download and install Chronicall Desktop.

Configuration Requirements				
<ul> <li>Agent Realtime Seat x 100</li> <li>Agent Dashboard x 100</li> <li>Xima Care</li> </ul>	User License Selection Pleas Server Edition (site 1)	se select which users you would like to log data for Auto Assigned		
			Finish	

Select which users you would like Chronicall to monitor. Chronicall will track call data for the selected users and will not track data for users who are not selected. Checking all users will put Chronicall in Auto Assigned mode, which will automatically apply a license to new users when Chronicall detects them. Select the desired users, then click Finish.

Configuration Requirements				
<ul> <li>Licensed Users</li> <li>Agent Realtime Seat × 10</li> </ul>	Realtime Seat Assignment	Users for Realtime View		
<ul> <li>Agent Dashboard x 10</li> <li>Xima Care</li> </ul>	View by Agent   View by Agent    Dan Tobler(2001)  Deb TECH(5033)  Fax Admin(5048)  Forward Alani DID(5011)  Forward BoiseCell(1719)  Forward BoiseMain(1720)  Forward Frank DID(5013)  Forward Frank DID(5013)  Forward MC HME(5010)  Forward Tonya DID(5012)  Geordi La Forge(5016)  Cleonard Hofstetter(2000)  Mark Hill(5209)  0/10 Licenses Used			
		Finish		

If you purchased Realtime licenses then you will be prompted to select the users that you would like to view in Realtime. Select the desired agents, then click Finish.

Configuration Requirements					
<ul> <li>Licensed Users</li> <li>Agent Realtime Seat × 10</li> </ul>	Dashboards Seat Assignment	ct and Prioritize Dashboard Agents.			
S Agent Dashboard x 10	Unselected Dan Tobler(2001)	Selected       Up       Down			
		Finish			

If you purchased Dashboard licenses then you will then be prompted to select the users that you would like to give a Dashboard license to. Configure the desired users, then click Finish.

Configuration Requirements				
<ul> <li>Licensed Users</li> <li>Agent Realtime Seat × 10</li> <li>Agent Dashboard × 10</li> </ul>	Registration You have purchased Xima Care which gives you full access to technical support and future updates to Chronicall! Please take a moment to register so that our support team can serve you better.			
😮 Xima Care	Country: United States			
	Postal Code:			
	< Back Next >			

If you purchased Xima Care, our support plan, you will be prompted first for some contact details. The first request is for your Country and Postal Code. Enter these details, then press Next.

Configuration Requirements					
<ul> <li>Licensed Users</li> <li>Agent Realtime Seat x 10</li> <li>Agent Dashboard x 10</li> <li>Xima Care</li> </ul>	Technical Contact Info         Please enter a technical contact that Xima Support can work with to resolve any problems at your site. Ideally this person would have access to the Chronicall server, PBX system, and network.         Name:       John         Title:       IT         Phone:       8017132800         Email:       technical@business.com				
	< Back Next >				

Enter the contact information for a Technical contact, then press Next.

	Configuration Requirements
<ul> <li>Licensed Users</li> <li>Agent Realtime Seat × 10</li> <li>Agent Dashboard × 10</li> <li>Xima Care</li> </ul>	Renewal Contact Info         Please enter a contact at your company that Xima can work with when renewing Xima Care.         Name:       Jane         Title:       Sales         Phone:       8889449462         Email:       sales@business.com
	< Back     Finish

Enter the contact information for a Xima Care renewal contact, then press Next.

### Configure Call Recording within ShoreTel

Follow these instructions if you will be recording calls with the ShoreTel. You may skip this section if you will be recording calls with VRTX.

#### Configure a ShoreTel Route Point for Call Recording

Configuring call recording on ShoreTel systems requires setting up a new route point with the ShoreWare Director software. To do this, first open ShoreWare Director and select Call Control, then Route Points in the list to the left. This will open a list of your current route points. From here you can create a new route point. The following fields need to be defined.

Edit this record	Refresh this page
Name:	Chronicall Record
Extension:	1999
DID Range:	+18013074011 (15 of 20 available) PRI V View System Directory
DID Number:	
DNIS:	Edit DNIS Map
Language:	English(US) V
User Group:	Xima All 🗸
Route Point Server:	Headquarters 🗸
Mailbox Server	Headquarters V Escalation Profiles and Other Mailbox Options
Accept Broadcast Messages	
Include in System Dial By Name Direct	ory
Make Number Private	
Fax Redirect	
Call Stack Depth:	50
Recorded Name:	Record Play Erase Import NO audio input
Voice Mail Password:	•••• Confirm: ••••
▼ On-Hours	ours Holiday Custom
Escalation Profile:	<none> V Edit this profile</none>
Schedule:	<none> V Edit this schedule</none>
Call Handling:	
Call Forward:	◯ Always ◯ No Answer/Busy
Always:	Extension: 1101 : Voice Mail     Search
	External: (e.g. 9+1 (408) 331-3300)

• Extension: Enter an extension for the route point. This can be any free extension, and will need to be referenced later within Chronicall.

• Route Point Server: Choose the name of the server where Chronicall is installed, whether it's Headquarters or one of the application servers.

• Call Stack Depth: Enter the number of calls you would like to be able to record simultaneously. Please note that there are 250 audio resources that are shared between all auto attendants, voicemail boxes, and route points, including this one. If more than 250 total resources are assigned, your voicemail system or auto attendants might be affected.

Call Forwarding: Select Never.

Once configured, finish by saving the route point.

In addition to setting up the Route Point, verify that users have the ability to be recorded. This is done within the Class of Service of the User Groups that the users are members of. On the Class of Service page for telephony permissions, ensure that the "Allow Recording of Own Calls" is enabled.

#### Class of Service Edit Telephony Features Permissions Edit this record Allow Collaboration Features Allow Recording of Own Calls Allow Intersite Video Calls

Depending on your ShoreTel version, the "Allow Recording of Own Calls" may look like this.

### Install the Recording Library

The Recording Library is typically installed during the initial Chronicall installation. If Chronicall has already been installed then the Recording Library may also already be installed. You can verify this by opening the server's local services and verifying that the Chronicall Recording Library service exists. If the Chronicall Recording Library service is not on the server then you can install it by downloading and running a Chronicall Update (not the Recording Library setup).

Services (Local)				
Select an item to view its description.	Name	Description	Status	Startup Type
	🍓 Chronicall 🍓 Chronicall Database	Listens to th	Running Running	Automatic Automatic
	Chronicall Database (Orient Chronicall Recording Library	Utilizes the Chronicall R	Running Running	Automatic Automatic

#### Configure the Recording Library

<b>V</b>			
S Agent Realtime Seat x 40			
Configured)			
Recording Libraries	1 Recording Library		
VRTX Configuration 10 Trunks Configured			
Recording Rules	0 Recording Rules		
Record/Pause Permissions	Allow All		

Once Recording Library is installed, open Chronicall and go into System Settings > Recording Library > Recording Libraries "..." button.

Recording Libraries
Up
Down
Add
Remove
Edit
OK Cancel

Click Add. (one may have already been created by default that can be edited).

New Recording	Library Instance
Recording Library Ty	voe
Recording Configuration	~
疳 Recording Configura	tion
	OK Cancel

Select the Recording Library Type "ShoreTel System or VRTX".

Recording Configuration	ShoreTel System or VPTY
E Recording Configura	tion
Recording Library Syste	1
Recording Library IP Ad	127.0.0.1
Recording Library Port	9081 🚆
Chronicall Server Address	
Chronicall Server Port	9080
Simultaneous Encoder C	2
Recording Encryption	Store only new unencr
Clean Monitored Directory	True
Fallback Polling Interval	0:00:05
Recording Storage Loca	Configure Drive Pooling
Recording Route Point	
Recording Admin Extens	
Keep Unassociated	True
Association Time Limit	4:00:00
VRTX Processing Delay	0:00:15
Enable VRTX auto-detect	True
Java 64-bit home	
Port Mirror NIC Address	
	THEO

• Recording Route Point: Enter the extension you chose for the route point.

• Recording Storage Location: (optional) Configure where the Recordings will be stored. This defaults to be in the Recording Library directory. Note: If your hard drive is not very large then you should configure a storage pool that stores recordings onto another drive or another server.

Save the Recording Library and System Settings when complete.

#### Create a Recording Rule

Our final step is to create a recording rule that will determine which calls should be recorded.

Recording Libraries (1 Configured)			
Recording Libraries	1 Recording Library		
VRTX Configuration	5 Trunks Configured		
Recording Rules	0 Recording Rules		
Record/Pause Permissions	Allow All		

To access the recording rules, go to System Settings > Recording Libraries > Recording Rules "..." button.



Click "Add" to create a new recording rule.

ecording Rule Templates	📄 Required		
xternal Number	Agent	<5 Selected>	
gent journ	Percent of Calls to Record	Record All	
asic Call Event	Rule Title	Record Customer Service	_

Here you will create a new Recording Rule. Select the Recording Rule Template on the left and then fill in the options on the right. Once completed, press OK to save the new rule, OK to save the collection of rules, and then Save the System Settings.

## Configure VRTX with Recording Library

Follow these instructions if you will be recording calls with the VRTX. You may skip this section if you will be recording calls with ShoreTel.

#### Plug in the VRTX hardware

The VRTX needs to intercept the network traffic passing between your D-Marc and the PBX. An easy way to do this is to unplug the trunk cable from the PBX, plug it into the VRTX, then replug the other end of the VRTX back into the PBX (note, unplugging the trunk cable will terminate any active calls on that trunk). The USB then needs to be plugged into the server that will have the Recording Library software installed on it.



Example for a PRI line.

#### Install the VRTX Driver

Download the VRTX Driver from our Downloads page. Once downloaded, run the installer. This should only take a minute or two.



Click Next to begin the installation.



Choose a destination and click Next.

🔂 Setup - VRTX Drivers	-	-		×
Select Start Menu Folder Where should Setup place the program's shortcuts?				R
Setup will create the program's shortcuts in the fol	lowing Start	Menu fe	older.	
To continue, click Next. If you would like to select a differen	t folder, clic	Brows	e.	
VRTXDrivers		Brow	se	
< Back	Next >		Cance	el

Choose a destination and click Next.

🕞 Setup - VRTX Drivers	_		$\times$
Ready to Install Setup is now ready to begin installing VRTX Drivers on your compu	ter.	0	
Click Install to continue with the installation, or click Back if you wa change any settings.	nt to revie	w or	
Destination location: C:\Program Files (x86)\VRTX		^	
Start Menu folder: VRTXDrivers			
<		>	
< Back Ir	nstall	Can	cel

Click Install. Allow and complete any pop ups that appear.



Click Finish and restart the computer when appropriate.



Once the installer is complete, open up Device Manager and confirm that the VRTX shows up in the USB section.

### Configure the Trunk

Now we need to tell Chronicall what trunk the VRTX is plugged into.

C Recording Libraries (1 C	onfigured)	
Recording Libraries	1 Recording Library	
VRTX Configuration	5 Trunks Configured	
Recording Rules	0 Recording Rules	
Record/Pause Permissions	Allow All	

Do this by going into System Settings > Recording Libraries > VRTX Configuration "..." button.

Trunk Configuratio	on
PRI (Line 7)	Up
	Down
	Add
	Remove
	Edit
Sav	/e Cancel

Find the trunk that the VRTX is plugged into, select it and press Edit.

Tr	unk Configuration
Trunk Title	PRI
Device ID	Shoretel 🗸
Line ID	7 ≑
Channel Range	1 🜩 to 23 🜩 Detec
VRTX Serial	T00123AB

Update the Trunk Configuration page to have the correct information. A description of each field is below.

Trunk Title: Used to rename the trunk.

Device ID: Select the PBX that manages the specified trunk.

Line ID: This number should match the trunk number.

Channel Range: This specifies the channel range on the trunk. You can press "Detect" to determine what the range should be.

VRTX Serial: This is where you enter the serial number on the VRTX. Often you can click in the field and the VRTX Serial will appear as an option.

Once completed, press OK, Save the Trunk Configuration, and Save the System Settings.

#### Create a Recording Rule

Our final step is to create a recording rule that will determine which calls should be recorded.

Recording Libraries (1 Configured)			
Recording Libraries	1 Recording Library		
VRTX Configuration	5 Trunks Configured		
Recording Rules	0 Recording Rules		
Record/Pause Permissions	Allow All		

To access the recording rules, go to System Settings > Recording Libraries > Recording Rules "..." button.

Recording Rules			
		Add	
		Duplicate	
		Remove	
		Edit	
		Import	
		Export	
	ОК	Cancel	

Click "Add" to create a new recording rule.

.

Recording Rule Templates	E Required		
Inbound Number Dialed	Agent	<5 Selected>	
external Number Agent	Percent of Calls to Record	Record All	~
Group	Rule Title	Record Trainees	
3asic Call Event Advanced Call Event Advanced Call (to this point)			

Here you will create a new Recording Rule. Select the Recording Rule Template on the left and then fill in the options on the right. Once completed, press OK to save the new rule, OK to save the collection of rules, and then Save the System Settings.

# Configuration Tips

### Route Point Configuration

The Route Point Configuration is unique to the ShoreTel system. When Chronicall queries the ShoreTel configuration it will auto populate the Route Point Configuration fields, labeling each route point respective to the data we receive. However, occasionally this initial setup needs to be changed to more accurately describe the route point or even hide insignificant details.

	onicall Settings	
Basic Settings		
Advanced Settings		
Shore lei (site 1)		
Licensed Users	Auto Assigned	
Licensed Users Site Name	Auto Assigned ShoreTel	
Licensed Users Site Name IP Address of HQ Server	Auto Assigned ShoreTel 10.1.1.20	
Licensed Users Site Name IP Address of HQ Server Route Point Configuration	Auto Assigned ShoreTel 10.1.1.20	
Licensed Users Site Name IP Address of HQ Server Route Point Configuration Poll Info	Auto Assigned ShoreTel 10.1.1.20 False	
Licensed Users Site Name IP Address of HQ Server Route Point Configuration Poll Info Minimum Dialing To Keep	Auto Assigned ShoreTel 10.1.1.20 False	  3 •

Access the Route Point Configuration by going to System Settings and expanding the ShoreTel Site configuration. Click on the ellipsis to expand the settings.

extension: 1103	Backup Auto-Attendant:: ShoreGear 220T1A	Auto Attendant
Extension: 1104	Auto-Attendant: Network: SoftSwitch	Auto Attendant
Extension: 1105	VM Forward: Network: SoftSwitch	Voicemail
xtension: 1106	VM Login: Network: SoftSwitch	Voicemail
xtension: 1850	Boise MAIN RP	Route Point
xtension: 1851	Boise CELL	Route Point
xtension: 1852	Jesse Cell	Route Point
xtension: 1853	Phamacist Cell	Route Point
xtension: 1854	Boise RPh Oncall	Route Point
xtension: 1855	Jared Cell	Route Point
xtension: 1856	Chronicall Record	Route Point
xtension: 1993	3rd Party Software	Insignificant
xtension: 1994	ECC Sales IRN	Route Point
xtension: 1995	IVR Queue	Queue
extension: 1996	Support Center 6000 ECC	ECC Group
Extension: 1856 Extension: 1993 Extension: 1994 Extension: 1995	Chronicall Record 3rd Party Software ECC Sales IRN IVR Queue	Route Point Insignificant Route Point Queue

The Route Points are organized into a table with 3 columns.

- The first column lists the Extensions. These are not editable.
- The second column lists the Description Names. These can be changed within Chronicall if desired.

• The third column lists the Event Type. These can be changed to more accurately reflect what the route point is doing. If you have a 3rd party solution that is using a route point (such as a recording solution), you can set that route point to be "Insignificant" so it doesn't create duplicate events inside of a call.