



SOLUTION BRIEF

ShoreTel Integration with Microsoft Unified Communications

The demand for more efficient and productive communications has triggered major advances in unified communications (UC), driving the integration of what were once separate silos – information technology, communications, and application software.

The ShoreTel UC system already offers this level of integration with ShoreTel Communicator, but organizations that have already deployed Microsoft Lync may prefer to standardize on that application, rather than force end users to switch.

Benefits

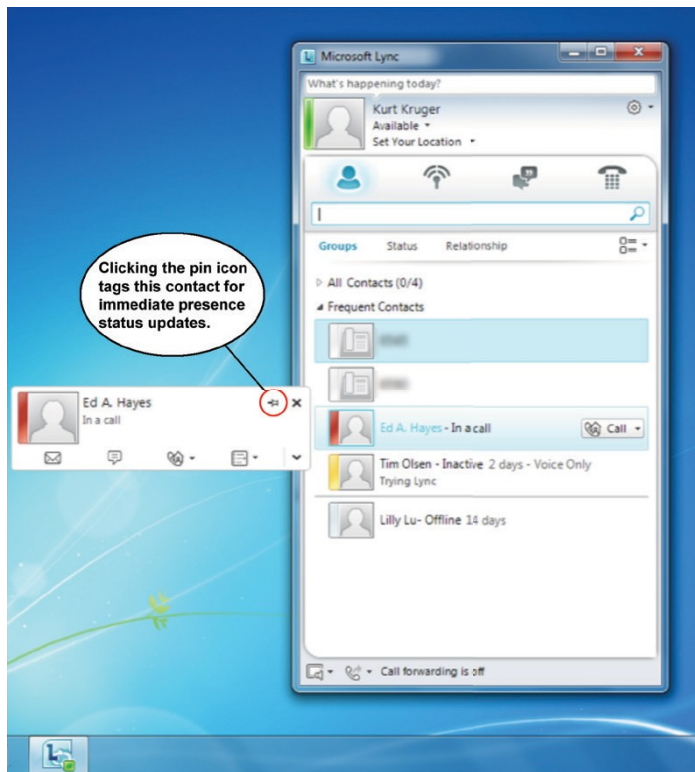
- Furthers a successful UC strategy with simplified integration
- Enables organizations to leverage existing investments and reduce training requirements
- Improves productivity with telephony presence and alerts
- Provides flexibility so users can use their preferred methods to connect

iolink recognizes that every organization has a different approach and a unique roadmap for UC. As a result, no one size fits all, so iolink offers integration options that allow customers using both ShoreTel and Microsoft products in their UC deployment to individually mix and match features of both products. This enables end users to continue using Microsoft Lync, while taking advantage of the rich functionality in the ShoreTel UC system.

Telephony presence: avoid endless phone tag

Anyone who has ever played phone, IM or email tag trying to finish up important tasks, knows how much more productive and efficient it could be if they received an alert when the person they were trying to reach became available. By

integrating ShoreTel's true telephony presence capabilities into Microsoft Lync Server, the ShoreTel CSTA Server delivers this information in real time. Users can simply "pin" a contact and receive an instant notification when that user's presence status changes from "in a call" to available. Tasks can then be accomplished in a timely and efficient manner.



Receive instant notification of availability status

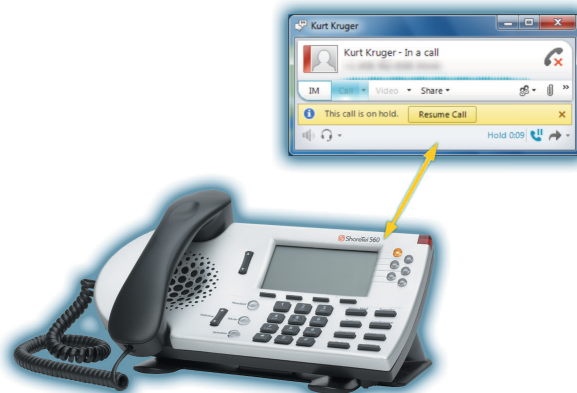
Beyond the Lync client interface, the ShoreTel CSTA Server delivers telephony presence across Microsoft Office applications, including Microsoft Outlook, Word, Excel, Sharepoint, and Powerpoint. Users simply check the presence icon next to the name of the person they want to reach, right click, and select to flag this contact for presence information – it's that simple!

Personalize the UC experience

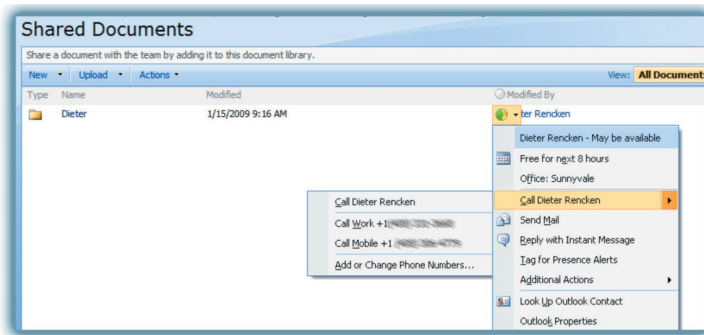
Human communication is very personal: some people are very visual, while others are more auditory. ilink understands that everyone has a preferred way of connecting with others, and recognizes that people within the same organization use communication tools differently. Some naturally tend to be more phone centric,

while others are more computer oriented. For this reason, a successful integration depends on consistency between the phone display and keys, and the computer interface. Any action available in the Microsoft Lync client should be available on the phone, so users can freely move between interfaces.

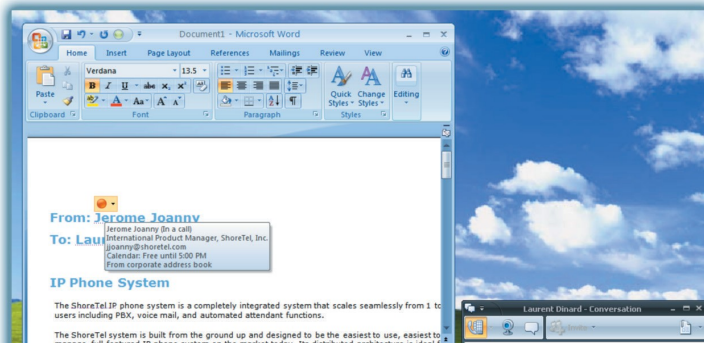
Some phone-centric users may prefer to ignore the desktop interface all together, and can depend on the system to automatically update telephony presence.



Example of a phone put on hold with the desktop application showing the same action.



Click-to-dial from within Sharepoint



Smart Tag technology enabling presence and click-to-dial within Microsoft Word

Dial from the interface you “live” in

For application-centric users, ShoreTel CSTA Server not only provides the application with telephony presence, but other important telephony features. With this level of integration, called Remote Call Control (RCC), users can place calls from Microsoft Lync, Microsoft Outlook and Microsoft Sharepoint, and reach out to contacts by IM, email or phone in just one click. Microsoft Office applications recognize phone numbers and contact names using Microsoft smart tags, and offer the option to dial directly from within the current application.

Enjoy “a la carte” integration

Telephony features in Microsoft Lync, enabled by ShoreTel CSTA server, bring many benefits to application-centric users by delivering telephony features to their existing Microsoft desktop.

The following additional options, **available from ShoreTel**, perfectly complement the Microsoft solution by truly breaking down communication silos, and enriching its functionalities.

Advanced Telephony Features

Some users need access to advanced telephony features. For instance, an executive assistant picking up and transferring the boss' calls as a single drag and drop task; a workgroup agent monitoring the number of queued calls and wait times; and the supervisor whispering into an agent's conversation or reassigning agents to handle a specific workgroup experiencing an unexpected load. These types of functions are available in **ShoreTel Communicator**, and have been ergonomically designed and optimized to serve telephony-centric users.

Use Microsoft Exchange for Unified Messaging

ShoreTel provides a comprehensive, simple, and robust unified messaging solution that satisfies a full range of customers' messaging needs. For customers who prefer to use the unified messaging capabilities in Microsoft Exchange instead, ShoreTel also offers a **direct SIP integration option** that eliminates the need for a third-party gateway.

Share IM presence and instant messages among all users

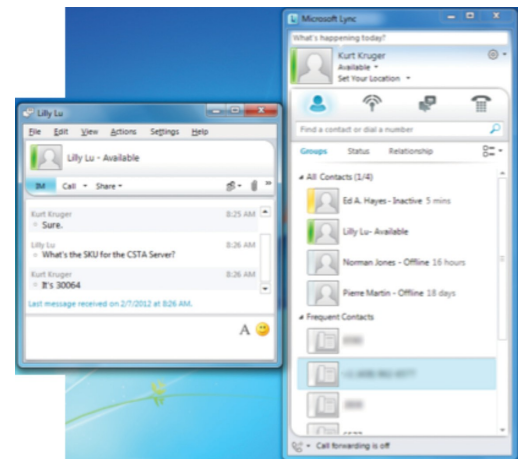
The ShoreTel UC system leverages the Microsoft Lync Server to drive IM and deliver IM presence to the **ShoreTel Communicator client**. As a result users can see each other's IM presence and exchange instant messages whether they are running Microsoft Lync or ShoreTel Communicator on their PC. ShoreTel enables the IT administrator to deploy the best client to match the user's needs, and take advantage of both systems without compromising end user satisfaction.

System engineering requirements

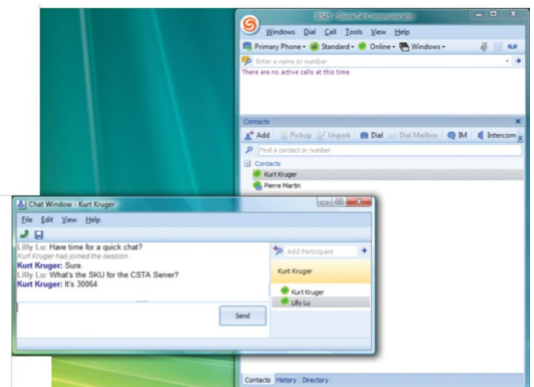
- ShoreTel release 12 or higher
- ShoreTel CSTA installed (refer to the ShoreTel CSTA documentation for specific system engineering)
- Microsoft Lync Server 2013 or Microsoft Lync Server 2010
- One Microsoft Lync 2013 Server Plus CAL per RCC user for Lync 2013, or one Microsoft Lync 2010 Server Plus CAL per RCC user for Lync 2010
- One ShoreTel CSTA client license per Microsoft RCC-enabled user

CSTA controls availability in Microsoft UC Versions	Lync 2010	Lync 2013
Make call	•	•
Receive call ⁽¹⁾	•	•
Caller ID	•	•
Call waiting ⁽²⁾	•	•
Call hold ⁽³⁾	•	•
Call retrieve	•	•
Alternate call	•	•
Single step transfer	•	•
Consultative transfer	•	•
DTMF digits generation ⁽⁴⁾	•	•
Call forward/call redirect	•	•
Missed call notification	•	•
Reply with IM	•	•

- (1) The RCC-enabled user can make and receive calls using Lync to control their ShoreTel IP phone but cannot place anything but PC-to-PC voice calls through the Lync softphone. When the RCC-enabled user accepts the call through Lync, the ShoreTel IP phone will go off-hook and the speakerphone will be activated.
- (2) The RCC enabled user gets a toast saying a new call is coming
- (3) The RCC enabled user can handle multiple calls at a time. Every call is represented by a separate communication window. The user can place any communication on hold during the conversation period.
- (4) Lync has option to send the DTMF digit over trunk calls using an on-screen keypad.



Example of Microsoft Lync 2010 (above) and ShoreTel Communicator (below) exchanging IM and aware of each presence—both telephony and IM presence.



About ilink

ilink is a provider of integration solutions and services for unified communications platforms. Its industry leading solutions integrate voice, audio, and video and intelligently link state-of-the-art UC systems in the datacenter or in the cloud with each other and with major business software and collaboration tools. With close focus on customers' requirements, these solutions help protect existing investments by enabling workers to fully utilize the capabilities of their existing UC and collaboration systems in order to gain increased productivity. With over 20 years of excellence in the implementation of ambitious projects, ilink delivers outstanding know-how through its strong Professional Services team. ilink is headquartered in Berlin, Germany and serves European and international customers in the US and other parts of the world.

For more information, visit www.ilink.de/en

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