



OfficeStatus Telephony Integration Guide

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Introduction

With its telephony integration features, OfficeStatus can monitor inbound and outbound calls and react by changing the status of one or more users. For example, OfficeStatus can be configured to change a user's status to "on phone" when calls are connected and then optionally revert to the previous status when the call is disconnected. OfficeStatus can also display caller ID information in the user status board, providing additional information and organizational efficiency.

As of the version 5.0 release, OfficeStatus offers a choice between *server-side* or *client-side* telephony integration. This article will discuss the differences between these options, as well as the configuration of each.

Client vs. Server Telephony Integration

In both the client and server telephony integration models, TAPI (Telephony Application Programming Interface) is used to communicate with the company's telephone system.

Client telephony integration is supported only if server-side integration is not enabled. Using it requires that a first-party TAPI driver (provided by your phone system vendor) be installed on each workstation running OfficeStatus Windows Client. OfficeStatus Windows Client is then configured to monitor a specific telephony line for call connect and disconnect events. Only the status of the user running OfficeStatus Windows Client is affected.

In contrast, server telephony integration requires the installation of a third-party TAPI driver (again, provided by your phone system vendor) on the OfficeStatus Server host computer. When server call monitoring is enabled, the OfficeStatus Maintenance system service will enumerate and open all available telephony lines in order to listen for call connect and disconnect events.

When calls are processed on the server, OfficeStatus finds a user account with a primary extension that matches the one associated with the telephone line that triggered the event. *Therefore, each user that participates in server-wide telephony integration must have a unique primary extension assigned to their OfficeStatus user account.*

Advantages of client-side call monitoring:

- Allows you to easily engage call monitoring in isolation (i.e. for a small subset of users)
- No need to acquire a third-party TAPI driver

Advantages of server-side call monitoring:

- No need to deploy a first-party TAPI driver to each individual user workstation
- User status changes will occur even if the user's workstation is off (or they aren't logged into OfficeStatus)
- Simplified configuration

Setup and Configuration

The steps required to configure OfficeStatus telephony integration will depend upon whether you're using server-side or client-side call monitoring (explained in detail above).

For client-side call monitoring:

1. Acquire **first-party** TAPI drivers from your telephony technology vendor.
2. Install the first-party TAPI driver (along with OfficeStatus Windows Client) on each workstation that needs to monitor calls. Configure the TAPI driver as per the vendor's instructions.
3. Ensure that **server-side telephony integration is not enabled** within the OfficeStatus Server web-based interface (*Administration | System | Telephony Integration*).
4. Configure OfficeStatus Windows Client to monitor the appropriate line and respond to call connect/disconnect events (see *Telephony Events* tab preferences window).¹

For server-side call monitoring:

1. Acquire **third-party** TAPI drivers from your telephony technology vendor.
2. Install the third-party TAPI driver on the OfficeStatus Server host computer. Configure the driver to monitor all telephone lines, as per the vendor's instructions.
5. Ensure that server-side telephony integration is enabled within the OfficeStatus Server web-based interface (*Administration | System | Telephony Integration*).
3. Ensure that each OfficeStatus user needing to participate in call monitoring has a unique **primary** phone number (with extension) associated with their user account.
4. Configure OfficeStatus Windows Client to respond to call connect/disconnect events (see *Telephony Events* tab preferences window).¹

¹ Default call connect and disconnect event handling options can also be configured on the server (see *Administration | System | Client Management | Client Settings*).

Responding to Telephony Events

Regardless of which method of call monitoring (e.g. server or client side) is used, you'll need to configure OfficeStatus to respond to call connect and disconnect events according to your needs.

Options include:

- Target status for user when an inbound call is connected
- Target status for user when an outbound call is connected
- Target status (or return to previous) when the call is disconnected
- Optional display of caller ID information in the user's status comments area

This configuration occurs at the user level, through the preferences screen of the web or desktop client. OfficeStatus administrators can also use the *Client Settings* screen to configure a set of default telephony event response behaviors, or optionally lock them down so that users cannot change them.

Troubleshooting

If you're using server-side telephony integration features, you can troubleshoot TAPI integration by first reviewing your OfficeStatus Server log (there is a log viewer tool built into the admin section of the web interface). TAPI integration errors will be logged here. General TAPI integration information will also be logged if the server's log level is set to "informational."

It is also possible to log TAPI events on the client side, although the procedure is slightly more involved. Please contact our support team for more information on client side TAPI troubleshooting.

Finally, if substantial TAPI configuration changes occur on the OfficeStatus Server machine, it may be necessary to restart the OfficeStatus Maintenance system service (which you can do through the *Services* admin tool).

Conclusion

OfficeStatus makes it easy to monitor supported telephony systems for call connect and disconnect events, and change the status of end users according to your own customized set of rules. These features save users from having to change their status manually when on the phone, increasing their efficiency and allowing them to stay focused on their work.

Please don't hesitate to contact us at sales@officestatus.com if you have any questions about the telephony integration features provided by OfficeStatus.