

# Xtension Recorder Universal Adapter 2.0 Quick Reference Guide

Comvurgent <u>www.comvurgent.com</u>

Downloads Available at www.usbcallrecord.com

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### Introduction

Thank you for choosing the Comvurgent Xtension Recorder. Your Universal Adapter 2.0 is a USB device that taps across your telephone line or the handset jack of your telephone allowing digital recording of your telephone conversations onto your PC. Using the Desktop software (included), you can create a file for each call and save this to the local PC or to a network location.

This guide is designed to help you quickly and easily install your Xtension Recorder Universal Adapter 2.0 device and its supporting software. We have also included a summary of the features and functions available on the Xtension Recorder Desktop software.

#### **CAUTION!**

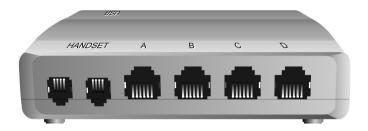
The use of monitoring, recording, or listening devices to eavesdrop, monitor, retrieve, or record telephone conversation or other sound activities, whether or not contemporaneous with transmission, may be illegal in certain circumstances under federal or state laws. Legal advice should be sought prior to implementing any practice that monitors or records any telephone conversation.

### **PC Compatibility**

The Xtension Recorder application supports Microsoft operating systems which support USB devices such as Windows 98SE, ME, 2000 and Windows XP.

Note: Windows 95, NT and Macintosh operating systems are not supported.

### **Connections**



### The Universal Adapter has seven connections as described below:

Connector	Name	Description
Handset (two sockets)	Telephone handset in/out	Connects to telephone handset (curly cord) in 'Handset Only Connection' or 'Mixed Connection'.
A & B	Line connections (pins 3 & 4)	Connects to telephone line cable using pins 3 & 4 – only used on analogue telephones.
C & D	Line connections (pins 2 & 5)	Connects to telephone line cable using pins 2 & 5 – only used on analogue telephones.
USB	USB Connection to computer	Socket to connect the USB lead between the Universal Adapter and your computer.

IMPORTANT NOTE: Do not connect the Universal Adapter to your computer yet. Please follow the software installation instructions on page 10 of this guide.

### **Installing the Universal Adapter**

### **Choosing the Connection**

The Universal Adapter supports three types of connection to deliver the best performance according to the type of telephone you want to connect:

- **Line Only Connection** records your conversations from the telephone line.
- Handset Only Connection—records your conversations from the telephone handset cord.
- Mixed (Line and Handset) Connection— connects to the telephone line for 'off hook' detection and Caller ID, and connects to your telephone handset cord to record the telephone conversation.

It is important that you understand the benefits of the various connection methods to make the correct selection.

### Digital or Analogue Compatibility

If you have a Digital PBX telephone, you must use Handset Only Connection. The features available in Line Only or Mixed Connections are not available because these require connection to an analogue telephone line. Digital PBX systems use digital signals for Caller ID and Dialled Digits. If you need to log Caller ID and Dialled Digits on a Digital PBX telephone, Comvurgent has a series of fully digital recorders available. Please visit <a href="https://www.USBCallRecord.com">www.USBCallRecord.com</a> for details.

If you have an analogue telephone, you can choose Line Only or Mixed Connection to suit your application.

## Xtension Recorder

#### **Connection method feature availability**

Feature	Line Only <sup>I</sup>	Handset Only	Mixed <sup>2</sup>
Off hook detect	×	×	✓
Dialled digit detection	✓	×	✓
Caller ID	✓	×	✓
Record other extensions	✓	×	×
Separate local and remote level adjustment	×	✓	✓

- Line Only Connection allows recording of parallel connected telephones. Start and end recording is detected by Voice Trigger. Off Hook Detect is not used because it is necessary to use the audio signal from any parallel connected telephone on the line to start and stop the recording.
- Mixed Connection is generally the best option if you have an analogue telephone and do not want to record parallel connected telephones.

### Advice on Selecting the Correct Connection for Your Telephone

### **Line Only Connection**

Select Line Only Connection if:

- You have an analogue phone (Line Only Connection will not work for digital PBX telephones) and
- You want to record parallel connected extensions (other extensions on the same line such as other phones on your home line) or
- You do not have a modular connector on your telephone handset cord.

If you want to record parallel connected telephones, you will need to select *Voice Trigger* for detecting the start and end of your telephone calls.

The main disadvantage of using Line Only Connection is that local and remote speech levels are mixed; however, your recorder has Automatic Gain control to equalize the levels.

### **Handset Only Connection**

Select Handset Only Connection if you have a digital PBX telephone (a phone which is designed for use on a specific telephone system). Off Hook Detect, Caller ID and Dialled Digit Detection will not be available from your telephone (these require connection to an analogue telephone line).

#### **Mixed Connection**

Select Mixed Connection if:

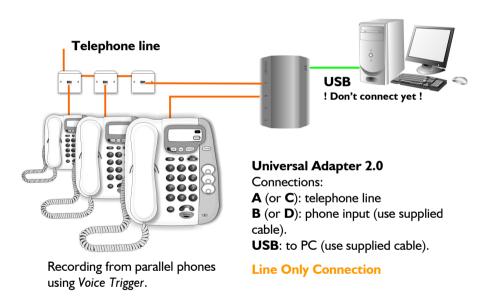
- You have an analogue phone (Mixed Connection will not work for digital PBX telephones) and
- You do not want to record parallel connected extensions (other extensions on the same line such as other phones on your home line).

Mixed Connection provides the 'best of both worlds' available for analogue telephones. Mixed Connection uses *Off Hook Detect* to identify the start and end of calls and both *Caller ID* and *Dialled Digit Detection* are available. The handset connection allows independent setting of local and remote speech levels.

### **Line Only Connection**

**IMPORTANT NOTE:** Do not connect the Universal Adapter to your computer yet. Please follow the software installation instructions on page 10 of this guide.

In Line Only Connection, connect your telephone line to the Universal Adapter through connectors A & B or C & D. As a general rule, try line connections A & B first; if this does not appear to work, try connections C & D (see below).



To set up a line connection to the Universal Adapter:

- I. Remove your telephone line connection from the base of your telephone.
- Plug the line connection into socket 'A' (you may need to change to socket 'C' depending upon how your line cord is wired).
- 3. Plug the line cord provided into socket 'B' and the other end into the telephone (you may need to change to socket 'D' depending upon how your line cord is wired).
- 4. Proceed to page 10 (Installing the Software).

### Line Connections A&B or C&D?

Analogue single line telephones sometimes use different connections within the cables for the telephone lines. For this reason, the Universal Adapter has two pairs of analogue telephone line connections: A & B and C & D.

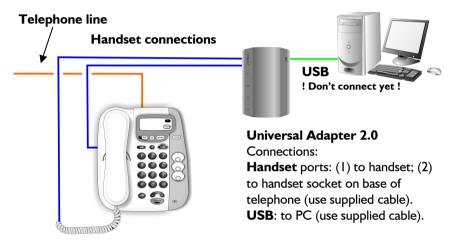
Most single line telephones use pins 3 & 4 (the centre pins) for the line connections. Use connectors A & B in this configuration. Some single line telephones in the UK and other related territories use pins 2 & 5 for the line connections. Use connections C & D in this configuration.

You will be able to test if you need to change to connectors C&D after you have installed the software.

### **Handset Only Connection**

**IMPORTANT NOTE:** Do not connect the Universal Adapter to your computer yet. Please follow the software installation instructions on page 10 of this guide.

For Handset Only operation, connect your telephone handset (the curly cord) to the Universal Adapter using the 2 sockets marked 'Handset'.



### **Handset Only Connection**

To set up a handset connection to the Universal Adapter:

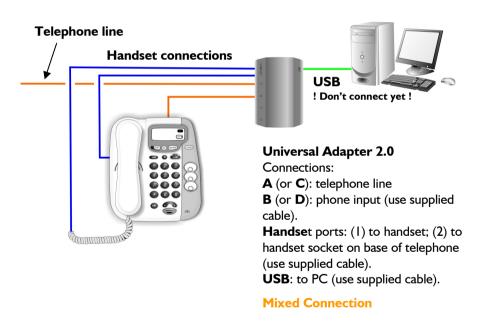
- I. Remove the handset modular connector from your telephone base.
- 2. Plug the provided handset line cord into the telephone base.
- 3. Plug the removed handset connector into one of the handset sockets of the device (it doesn't matter which one you use).
- 4. Connect the other end of the line cord into the second handset socket of the Universal Adapter.

#### Mixed Connection

**IMPORTANT NOTE:** Do not connect the Universal Adapter to your computer yet. Please follow the software installation instructions on the next page.

Connect your telephone line to connectors A & B or C & D (see page 7) and the telephone handset (curly cord) through the 2 sockets marked 'Handset'.

See the instructions for both Line Only and Handset Only Connections on the preceding pages.



### Installing the Software

Register your product at <u>www.USBCallRecord.com/register</u> for free support and to receive information on the latest upgrades!

### **Check the Software Version**

Before you install the software on the CD, check that you have the latest version by visiting <a href="https://www.USBCallRecord.com">www.USBCallRecord.com</a>:

- 1. Click Support and Downloads.
- 2. Click Software and Upgrades.
- 3. Click Enter your Info.
- 4. Click Submit.
- 5. Click on *Universal Adapter 2.0* (be sure to select version 2.0).

If the listed version number is greater than that shown on your CD:

- I. Download the software onto your PC making a note of the destination folder on your PC.
- 2. Extract the installation files to a folder.

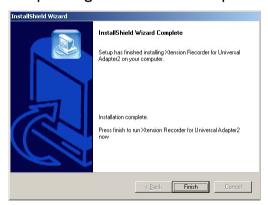
### Run Setup

 Locate the Setup.exe file. This will be on the CD or, if you have downloaded a later version of the software, in the folder you used to extract the installation files. To find it on the CD:



- a. Double-click on My Computer.
- b. Look for XtR Universal 2 and right click on it.
- c. Select Explore from the popup menu.
- 2. Double-click on the icon or setup.exe to begin the installation.

- Follow the on-screen prompts to complete the installation procedure (it may vary according to your operation system). You will need to:
  - Accept the License Agreement.
  - Choose the destination folder where the Program will be located.
  - Specify the location where your recorded calls will be stored (by default the program creates a My Calls folder in My Documents. Note: this location can be changed at any time after installation).
- 4. When the software installation is complete, click on the Finish button. The InstallShield Wizard will remain on your PC's desktop throughout the rest of the procedure.



 The installation of the USB drivers starts automatically.
 Connect the supplied USB cable to the Universal Adapter and then insert the other end into a vacant USB port on your computer. 6. Click on the **OK** button. The USB drivers will now be installed. Please be patient as this may take a few minutes (see image below).



 If you receive a warning that the hardware has not passed 'Windows Logo Testing' (see below) please click Continue Anyway.



### Windows Logo Testing

Microsoft introduced the "Designed for Microsoft Windows XP" Logo programme to ensure that products are compatible with Windows XP. Compliance testing for the programme is a lengthy and expensive process and most manufacturers release products before full approval has been obtained. Comvurgent's software is thoroughly tested internally and is 100% compatible with Windows XP.

8. Click on the **Close** button to finish the install process.



9. The **Recorder Setup** program is displayed.

The next section describes how to use **Recorder Setup** to optimize your system.

### Recorder Setup

Telephone line and handset levels vary, so we have included the Recorder Setup Wizard to help you optimize recorded voice levels and specify how the software starts and stops recordings.





**Recorder Setup** starts automatically after software installation. You can change settings at any time by selecting the Setup Wizard icon from your desktop or the Comvurgent program group in the Start menu.

There are eight steps in the procedure:

- Identifying the connection method: Line Only, Handset Only or Mixed.
- 2. Choosing a method for starting and stopping recordings.
- 3. Carrying out an Off Hook test (if selected in step 2)
- 4. Adjusting audio levels.
- 5. Adjusting Voice Trigger options (if selected in step 2).
- 6. Checking dialled digits detection (Line Only and Mixed connections only).
- 7. Saving the new settings.
- 8. Starting and configuring Xt Recorder with a test call.

Click on the **Next** button to get started. At any time, you can click on the **Back** button to return to previous pages and modify settings you have already chosen. No settings are applied until you have



completed the Wizard by clicking on the **Finish** button on the last page.

If you chose to close the Wizard by clicking on the **Cancel** button, any changes you have made are discarded and the Universal Adapter will continue to operate under its original configuration.

#### I. Connection

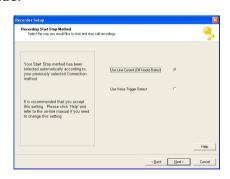
On the Connection page, identify the method you have selected to connect the Universal Adapter to your phone:

- Handset Only Connected
- Line Only Connected
- Handset and Line Connected (Mixed)

Click on the **Next** button to continue.

### 2. Recording Start/Stop Method

On this page, you can select the method you want to use to start and end recordings. The Wizard picks the option best suited to your connection method and you are recommended to accept this.



- Use Line Current (Off Hook) Detect
  - not available with Handset Only Connection.
- Enable Voice Trigger

You will set up Voice Trigger options in step 4.

If you have selected Enable Voice Trigger, continue to step 4.

### 3. Off-Hook Test

If you have selected Use Line Current (Off Hook Detect) in step 2, the next page prompts you to test the off-hook detection.



Take the telephone handset off-hook. The

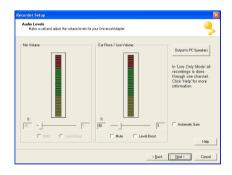
image should change to show a phone off-hook.

If it doesn't work, check that you have connected the Universal Adapter correctly. You may need to change the line connections from A&B to C&D (see page 7).

#### 4. Audio Levels

This page allows you to optimize voice levels using the slide controls.

 Take your telephone off hook and make a call.



### All connection methods:

As you speak, adjust the **Mic Volume** slider to ensure the level is in the green section of the meter.

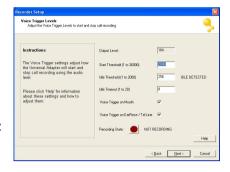
Handset only and mixed connections: As the remote speaker talks, adjust the Earpiece/Line Volume slider to ensure the level is in the green section of the meter.

2. Put the phone back on-hook.

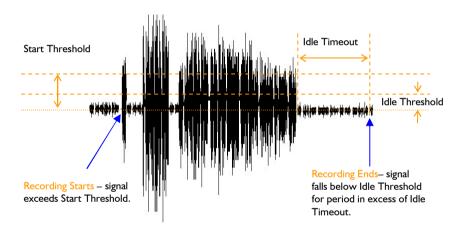
### 5. Voice Trigger Levels

If you selected Use Line Current (Off Hook) Detect in step 2 (see page 15), continue to step 6.

Voice triggered recording commences when the line signal exceeds the **Start Threshold**, for example, when the 'Off Hook' sound occurs.



Recording stops when the line signal falls below the **Idle Threshold** and remains below this value for a set period – the **Idle Timeout**.



Two further *Voice Trigger* options determine whether Xt recorder monitors the signal from the mouthpiece and/or earpiece.

- Voice Trigger On Mouth Select or mute Voice Trigger from the Mouth input. Turn off if you have a 'Live Microphone' (telephone microphone is on when phone is on hook).
- Voice Trigger On Earpiece/Tel Line Select or mute Voice Trigger from the earpiece/line input. Use to record from parallel telephones.

The default Voice Trigger settings should suit most applications. The following procedure explains how you can check that the settings are suitable for your system:

### I. Check the Start Threshold.

Take the handset off-hook, and check that the Start Threshold is triggered (START DETECTED is displayed). If your telephone has a live microphone and hence higher noise levels, you may need to set a higher value to avoid 'false starts'. See also *Voice Trigger on Mouth*, below.

#### 2. Test the Idle Threshold.

With the phone on-hook, ensure that the Idle Threshold level is above the levels in the 'Peak Level' boxes (IDLE DETECTED is displayed).

If you have a noisy line or telephone, you may need a higher value (>250). If the value is too low it may merge calls; too high and it may slice calls into several recordings if the conversation has silence pauses.

#### 3. Set the Idle Timeout Period.

Extend this time beyond the default of 8 seconds if your calls tend to have long pauses.

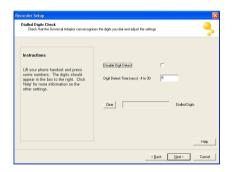
**Note.** If you finish one call and start another within the Idle Timeout period, Xt Recorder will merge the two calls into a single recording.

- 4. By default, Voice Trigger detection operates on both the mouth and earpiece/telephone line signals. You may want to change these settings:
  - Disable Voice Trigger on Mouth if your telephone/ headsets remain in an off-hook state with a live local microphone, even when the phone is on-hook. The software then monitors the remote end for the start trigger (note this only applies to handset connectivity).
  - Voice Trigger on Earpiece/Tel Line Select this option if you want to record from other telephones connected on the same line.

Click on the **Next** button to continue. If you selected *Handset Only Connection* in step 2, continue to step 7.

### 6. Dialled Digits Check

If you are using a Line Only or a Mixed connection type, then the Universal Adapter can detect the digits that you type when making a call. If you want to use this feature, ensure that the **Dialled Digit Detection** option is selected.



You should not normally need to alter the settings on this page for normal operation.

### To test Dialled Digit Detection:

- 1. Lift the handset of your phone and dial some numbers; they should appear in the Dialled Digits box. Use the 'Clear' button to clear the display.
- 2. After the start of a call, and after each key press, the Universal Adapter will continue to look for further key presses for the Digit Detect Time (in seconds). No further key presses will be recorded after the Digit Detect Time has elapsed. You can adjust this period to ensure that spurious digits are not reported.

Note. The Universal Adapter uses the tone produced by each key as you press it to detect which key is pressed. This can occasionally result in key presses being missed or detected wrongly. During the course of a call other noise on the line may cause a key press to be detected when none took place. If you experience problems with the Universal Adapter detecting false or spurious numbers you may want to disable Dialled Digit Detection.

Click on the **Next** button to continue.

### 7. Recorder Setup Complete

You have completed the setup of your Universal Adapter.

Click on the **Back** button to return to the wizard and review the settings.

previous configuration.

Click on the **Finish** button to

save your settings and launch XtRecorder. Click on the **Cancel** button to discard all changes and restore the



### 8. Starting Xtension Recorder

After testing your system with the Recorder Setup Wizard:

- I. Click on the **Finish** button to store the settings.
- 2. You are now prompted to register the software. Click on the link to register online at <a href="https://www.USBCallRecord.com/register">www.USBCallRecord.com/register</a>. Click on the **Cancel** button to continue.
- 3. The XtRecorder Choose Defaults window is displayed. Choose one of the three recording options:

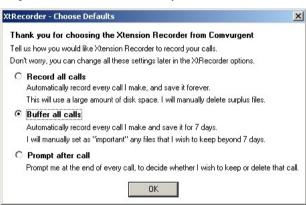
**Record all calls** Record every call and save until

deleted.

**Buffer all calls** Record every call and delete after 7

days unless identified as 'important'.

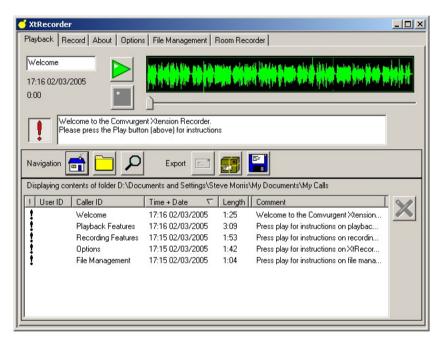
**Prompt after call** Prompt to save or delete each call.



4. Click on the **OK** button to continue.

 The Xtension Recorder software starts and is minimized to the system tray. Right-click on the XtRecorder icon and choose View from the popup menu to display it.





Xt Recorder in action

### **XT Recorder - Setup and Use**

This section gives a brief overview of the Desktop software. It explains how to set up the software on the *File Management* and *Options* pages and how to record and review calls using the *Record* and *Playback* pages. For more information, listen to the audio tutorials included as part of the software installation.

### File Management

Use the File Management page to choose the location to store your calls:

- Browse to a specific location or accept the default folder. If you intend to store files on a network server, we recommend that you buffer the calls in a folder on the local PC.
- Auto-Delete Selection Choose when calls should be deleted, if ever.

Note: Calls marked important will never be auto-deleted.

### **Options**

Use the Options page to determine how calls are recorded:

- Automatically start recording every call select this option if you want calls to be recorded automatically.
  - **Note:** To record manually, press the Record button on the Record Tab.
- Choose recording format We recommend using our GSM compression to minimize disk usage (up to 170 hours in 1Gb).
- Show dialog when Recorder starts Select this option if you want the Xtension Recorder main screen to be displayed automatically whenever recording starts.
- Call selection Choose this option to ignore very short calls (such as misdials).

Prompt me for call Information. – Choose this option to display an
information box, either at the start or after each call. You can use
this to determine whether the software saves or deletes the call,
to enter notes or mark the call as 'important'.

#### Record

Use the *Record* page for manual recording, for marking calls and for taking snapshots of conversations. The box in the upper right hand corner shows the dialled number or caller-id (most versions). This information can be edited during call recording. The *Record* page features the following tool buttons:



Start recording.



Pause recording.



Stop recording.



**Mark** a call as 'important' for easy future recall. Calls marked with an 'important' status are not Auto Deleted.



Take a **snapshot** of the current call and make it available for immediate playback – even while still recording the remainder of the call.

You can type notes about the conversation or transaction being recorded in the box under the toolbar.

### **Playback**

Use the *Playback* page to access and play back your stored calls. It features the following tool buttons:



**Search** - Enter the telephone number or text you want to search for and then select whether you want to include the notes field in the search as well as other folder locations. You can also search for calls within a specific date range.





**Navigation** – view the Home folder or browse to other call storage locations. Click on a heading in the call list to order calls by that parameter, for example: *User ID*, *Caller ID* or *Time & Date*.



**E-mail recording** - either as a .wav or native .xtr file. Note: If you email a recording in the .xtr format, the recipient can download a player free of charge from **www.USBCallRecord.com**.



**One-Touch Export** – export the selected call to a *wav* file.



Mark selected call as 'Important'.



**Delete** – delete the selected recording.

While in the playback area, you can also edit or modify notes or caller ID/ number dialled information.

### **Security**

You can restrict a user's ability to stop, pause or delete recordings or change software options.

To set user and password protection options, run the program: XtRconfig.exe.

This can be found in the same folder as the Xtension Recorder program. On a standard installation, this is:

C:\Program Files\Comvurgent\Xtension Recorder.

### Multiple User Logins on PC

If you have multiple user logins and restrict user access to features of the PC and or the XTR program, you will need to:

- Load the software using an Admin Login to the PC.
- Create a shortcut to XTRecorder.exe in the Startup folder for All Users.

An option in the XTRconfig.exe program allows you to give the same configuration and restrictions to all users or unique settings for each user.

### **Troubleshooting**

The following table lists common problems with a brief explanation of the solution. Check that you have the latest version of software (see page 10).

In many cases, problems are due to an incorrect **Recorder Setup** configuration. **Xtension Recorder** relies on correct settings of the Gain Level controls for reliable and quality performance. Please ensure these are set correctly before attempting to adjust other parameters (see page 14).



You can start **Recorder Setup** by clicking on the Configuration icon on your PC's desktop.

If your problem is not included here or remains unresolved, please contact: <a href="mailto:support@comvurgent.com">support@comvurgent.com</a>.



Problem	Solution	
Device not initializing during installation	Driver for device was not loaded properly.	
	<ol> <li>Close Xtension Recorder: right click on the icon in the system tray (see page 19) and select <b>Exit</b> from the popup menu.</li> </ol>	
	<ol> <li>Insert the CD. Browse to the CD using My         Computer or Windows Explorer and locate the         Drivers folder. Find the file named 'install' within this folder and double-click on it.     </li> </ol>	
	3. Follow the instructions to re-install the driver.	
	4. Restart Xtension Recorder.	
Xtension Recorder not starting or stopping recordings.	Use Recorder Setup to adjust start/stop parameters (see page 15).	
Xtension Recorder continuously records	The <b>Idle threshold</b> level is set too low. Increase and save using Recorder Setup (see page 17).	
Several recordings are made for each call	The <b>Idle threshold</b> is set too high and/or the <b>Idle Timeout</b> is set too low. Adjust and Save using Recorder Setup (see page 17).	
Two calls are merged into one (using Voice Trigger)	This can happen when a call is finished and another answered quickly: Xtension Recorder needs to detect silence on the line for a few seconds to know a call is finished (you can adjust the <b>Idle Timeout</b> using Recorder Setup but this may also result in multiple recordings for any one call).	
Xtension Recorder will not start auto- recording (using Voice Trigger)	First, make certain that Record all calls is checked on the Options tab in Xtension Recorder. If this is the case and calls can be manually recorded by pressing the Record button, you will need to adjust the Start Threshold in Recorder Setup (see page 17). Try reducing by 50%.	



Problem	Solution
Distant End is too low (Line Only Connection)	When using Line Only connection, local (Microphone) level is always higher than the distant end. Select Automatic Gain (see page 15) to equalize the levels on the line.
Dialled digits not detected	Xtension Recorder uses advanced CPU processing techniques to detect the digits dialled. This is not always perfect depending upon the method of connection and the levels and timing of the digits.
Line Current Detect Connection does not detect telephone off hook	Try changing your line connections from A&B to C&D (or vice versa)
No line signal in Line Only Connection	Try changing your line connections from A&B to C&D (or vice versa)
Short unexplained calls	This may be due to some telephones entering an Off Hook state automatically for a few seconds to charge a battery (typically 10 seconds). If you want to remove these from the playback list, simply extend the minimum duration for recorded calls ( <i>Options</i> tab in Xtension Recorder) to be greater than the Off Hook time.

### Other great products from Comvurgent

If you are expanding your recording capability or wish to try alternative ways of recording, check out some of our other products in the Xtension Recorder range.

### **Introducing the Xtension Recorder Digital Series**

**Xtension Recorder Digital 01 is a** low-cost USB extension desktop True Digital recorder for most PBX Digital telephones and comes complete with our XTR Desktop applications software.



Xtension Recorder Digital 04 is a stackable 4-port digital USB unit. It allows cost-effective, fully centralized,

recording for medium-to-large XTR Digital 04

installations. Digital 04 includes both BackOffice software and Call Manager supervisor positions.

XTR Professional Digital 16 is a 1U rack-mounted, stackable, 16extension connector designed to be installed in your equipment room to monitor multiple extensions on one server. Digital 16 is

designed for higher density applications and comes complete with our BackOffice recorder and Call Manager supervisor software.

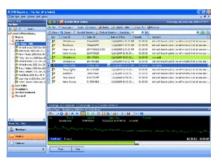
### **Need to Connect Your Recorder Centrally?**

BackOffice is the solution! If you need to locate your Digital 01 devices centrally alongside your PBX, BackOffice allows you to connect up to 20 Digital 01 devices or up to 48 extensions of Digital 04 and Digital 16 units onto a central server PC. BackOffice delivers cost-effective call recording without any desktop clutter.



#### **Need a Supervisor Position?**

XTR Reporter, XTR Reporter Pro and Call Manager form a comprehensive suite of advanced visibility, access, retrieval, playback, analysis and reporting tools for XtR Professional power



users and administrators. All three applications are built on the robust Microsoft .net framework and designed to manipulate large volumes of recordings, whether created by Desktop users (Digital 01 or Universal Adapter), or BackOffice (using Digital 01, Digital 04 or Digital 16).

Call Manager is the entry-level package, designed to provide the manager or supervisor with the ability to quickly and easily gain access to important calls.

XTR Reporter delivers feature rich productivity tools in a familiar, ergonomic and easy to use MS Office style interface.

XTR ReporterPro takes all of the XTR Reporter features and adds our Call Grading agent Assessment module.

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Note: To check your current version of **Xtension Recorder** software, click on the *About* tab.

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### The Comvurgent Team!

