Xtension Recorder
Universal Adapter 3.0
Installation and User Guide

Introduction

This document describes the features and capabilities of the Universal Adapter 3.0 hardware and XTR Desktop software solution.

The Universal Adapter 3.0 solution consists of a USB device that taps an analog telephone line allowing digital recording of your telephone conversations onto your PC. Using the Desktop Software (included) the Universal Adapter 3.0 provides a professional recording solution for one user or hundreds.

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 that support USB devices. The list of existing operating systems which meet this requirement are:

- WIN 2000 (all versions)
- WIN XP (all versions)
- Windows Vista (all versions)
- Windows 7 (all versions)

Important Note – Xtension Recorder will not support WIN 98/ME and below or Mac operating systems.

Installing the Universal Adapter 3.0v2

Step 1 – Choose the Connection type and make the physical connections to the Universal Adapter 3.0.

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

- **Line Connection** – records your conversations from the telephone line.
- **Handset Connection** – records your conversations from the telephone handset cord.

It is important that you understand the difference between the two types

of connections and make the appropriate selection in order to record your calls.
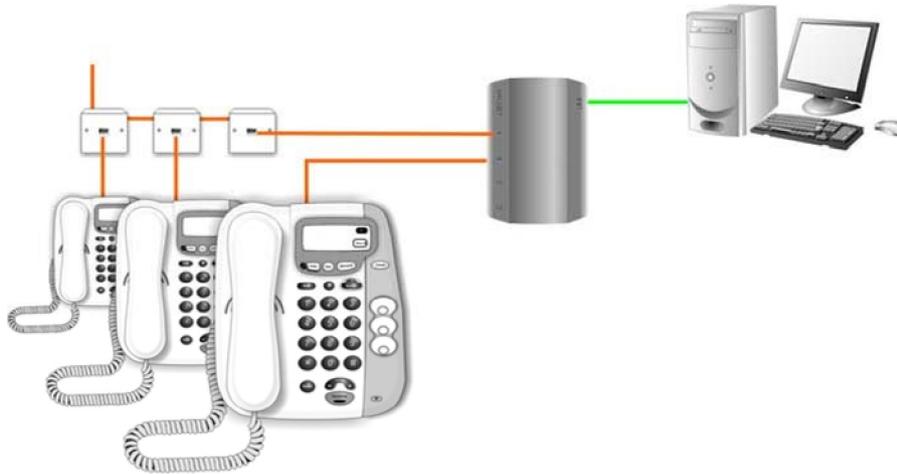
Line Connection

Select Line Connection if:

- You have an analog phone (Line 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) **and**
- You want to collect Caller ID and Digits Dialed (CID only if provide by your telecom line provider)

Handset Connection

- If you have a Digital or IP PBX telephone, you must use the Handset Connection. Some features available in Line Connection are not available (Caller ID, Digits Dialed, Parallel Recording) because they require connection to an analog telephone line. Digital PBX systems use digital signals for Caller ID and Dialed Digits. If you need to log Caller ID and Dialed Digits on a Digital PBX telephone, we offer a series of digital recorders available. Please visit www.USBCallRecord.com for details.

Installation – Line Connection

- Remove the telephone line connection from the base of your telephone
- Plug the line connection in the socket labelled "Line" on the back of the Universal Adapter 3.0
- Plug the line cord provided into the socket labelled "Phone" and the other end into the telephone.
- Verify that the Slide Switch Selector is set to the L1 Position (far left)
- Connect the supplied USB cable to the Universal Adapter 3.0 and then insert the other end into a vacant USB port on your computer.
- Insert the included Universal Adapter 3.0 CD into the CD drive of your computer. Click on the "Install Software" button. Follow the directions during the installation procedure to set up the XtR Desktop Software.
- If you have a Broadband/ADSL service on your line, please ensure you are using a Broadband Microfilter between the wall socket and the Universal Adaptor.

Installation – Handset Connection

To set up a handset connection to the Universal Adapter:

- Remove the handset modular connector from your telephone base.
- Plug the provided handset line cord into the telephone base.
- Plug the removed handset connector into one of the handset sockets of the device (it doesn't matter which one you use).
- Connect the other end of the line cord into the second handset socket of the Universal Adapter.
- Verify that the Slide Switch Selector is set to the L1 Position (far left)
- Set the Handset Type Switches on the back of the Universal Adapter 3.0 to the A and 1 positions.
- Connect the supplied USB cable to the Universal Adapter 3.0 and then insert the other end into a vacant USB port on your computer.
- Insert the included Universal Adapter 3.0 CD into the CD drive of your computer. Click on the "Install Software" button. Follow the directions during the installation procedure to set up the XtR Desktop Software.
-
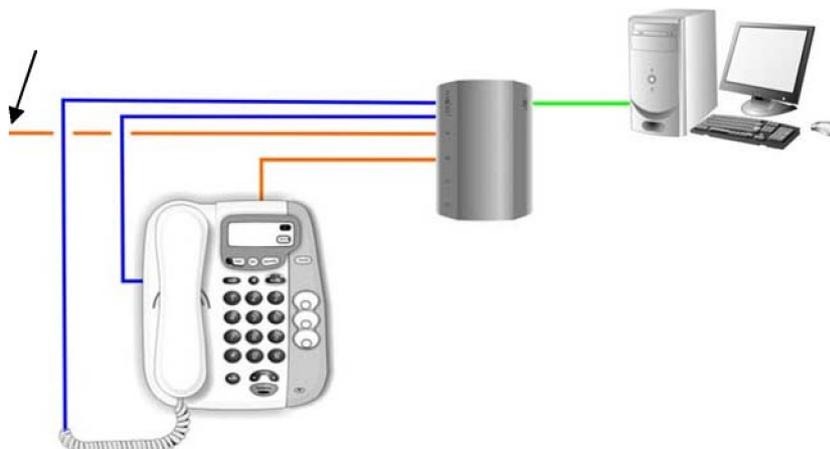
Insert the CD that came with your Universal Adapter 3.0 into the CD drive of your PC. The CD will run an installation application – Select "Install" from the list of options on the install screen.

Step 2 – Install and Configure the Recorder and Player Software

Insert the CD that came with your Universal Adapter 3.0 into the CD drive of your PC. The CD will run an installation application that will guide you through the software installation process. Follow the steps as outlined on your screen

1 – Read the manual (f you have not done so already)

2 – Install the Hardware (see above for hardware installation)

3 – Install and configure the software.
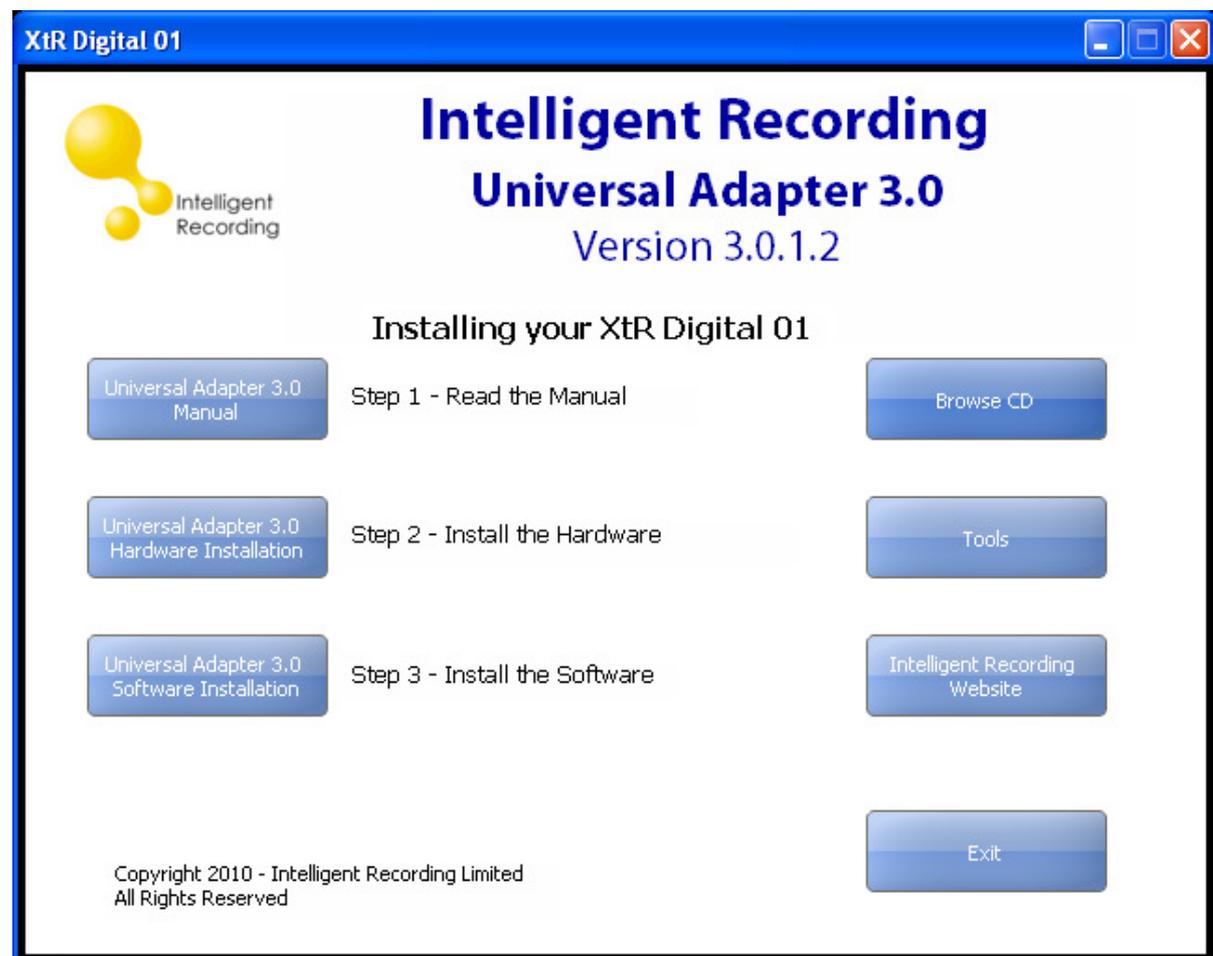
After clicking on Install the Software for your Universal Adapter 3.0 the following screen will appear. Select "Run".

Select Next.

InstallShield Wizard

License Agreement
Please read the following license agreement carefully.

Press the PAGE DOWN key to see the rest of the agreement.

END USER SOFTWARE LICENSE AGREEMENT

BEFORE INSTALLING THIS LICENSED PRODUCT ON YOUR COMPUTER, YOU
MUST CAREFULLY READ THE FOLLOWING LEGAL DOCUMENT BETWEEN YOU,
THE RESELLER, AND INTELLIGENT RECORDING ET AL.
INSTALLING THE PRODUCT INDICATES YOUR ACCEPTANCE AND AGREEMENT
OF THESE TERMS AND CONDITIONS.
IF YOU DO NOT UNDERSTAND OR AGREE WITH ALL TERMS AND CONDITIONS,
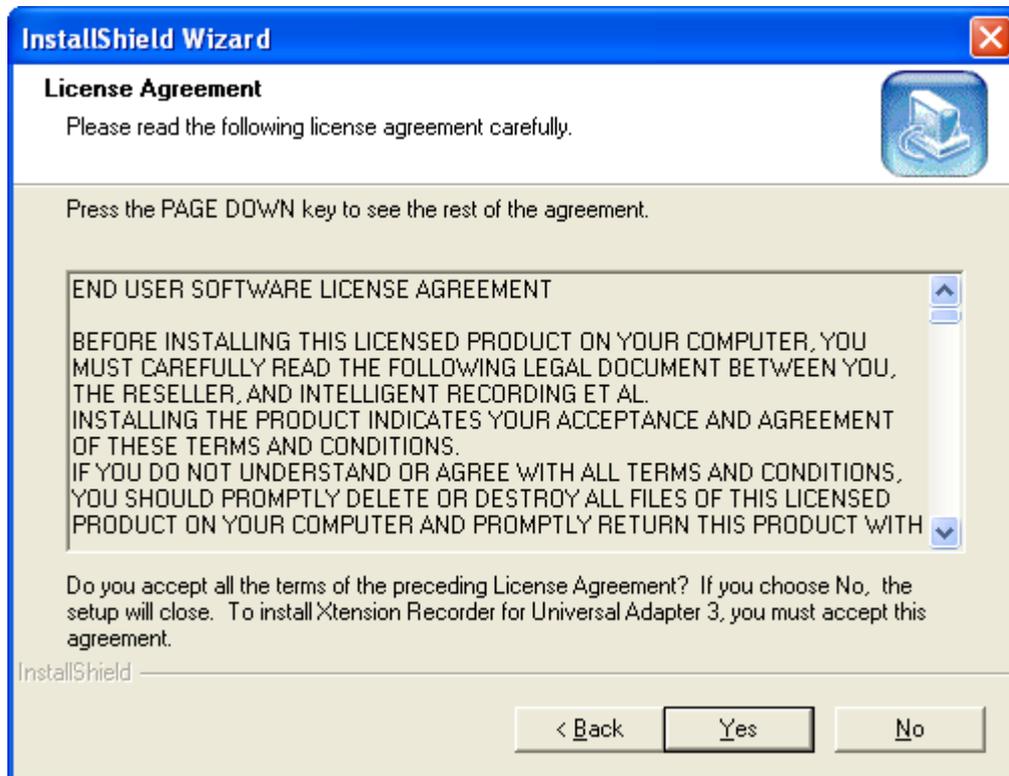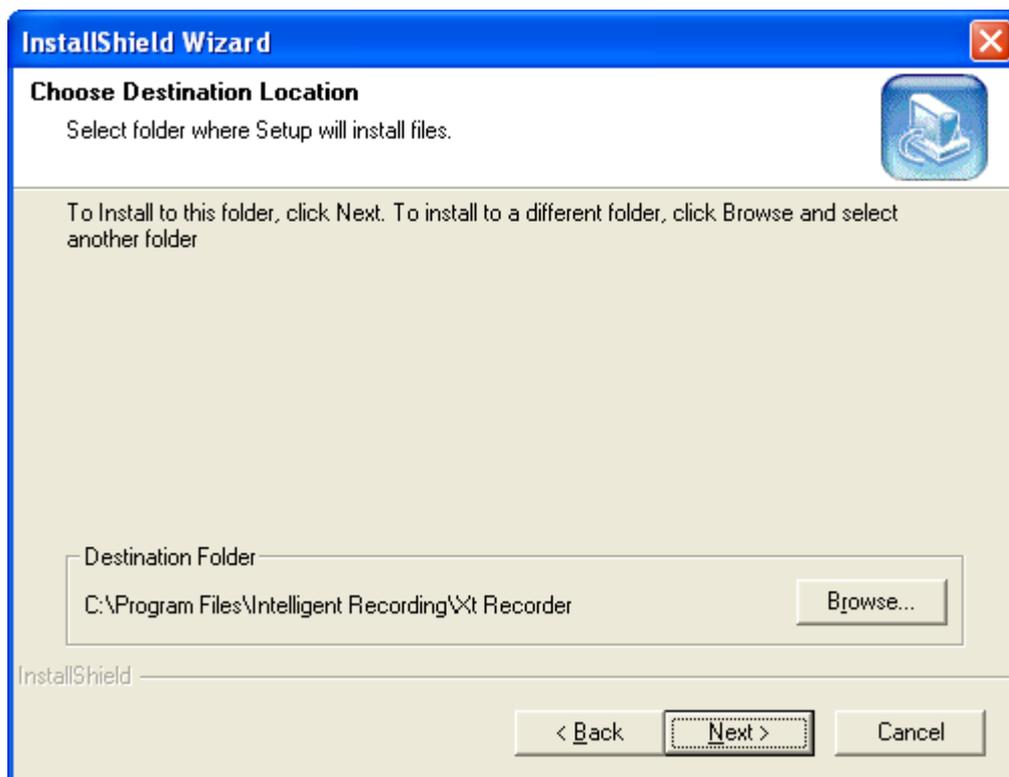YOU SHOULD PROMPTLY DELETE OR DESTROY ALL FILES OF THIS LICENSED
PRODUCT ON YOUR COMPUTER AND PROMPTLY RETURN THIS PRODUCT WITH

Do you accept all the terms of the preceding License Agreement? If you choose No, the
setup will close. To install Xtension Recorder for Universal Adapter 3, you must accept this
agreement.

InstallShield

[< Back]   [Yes]   [No]

Select Yes to accept the license agreement and continue.

InstallShield Wizard

Choose Destination Location
Select folder where Setup will install files.

To Install to this folder, click Next. To install to a different folder, click Browse and select
another folder

Destination Folder
C:\Program Files\Intelligent Recording\Xt Recorder   [Browse...]

InstallShield

[< Back]   [Next >]   [Cancel]

Select Next to accept the default destination location for
installation (recommended).

InstallShield Wizard

Choose Data Folder

To store your calls here, click Next. To store data in a different location, click Browse and select another folder

Destination Folder

C:\...\Don Clark\My Documents\My Calls   Browse...

InstallShield

< Back   Next >   Cancel
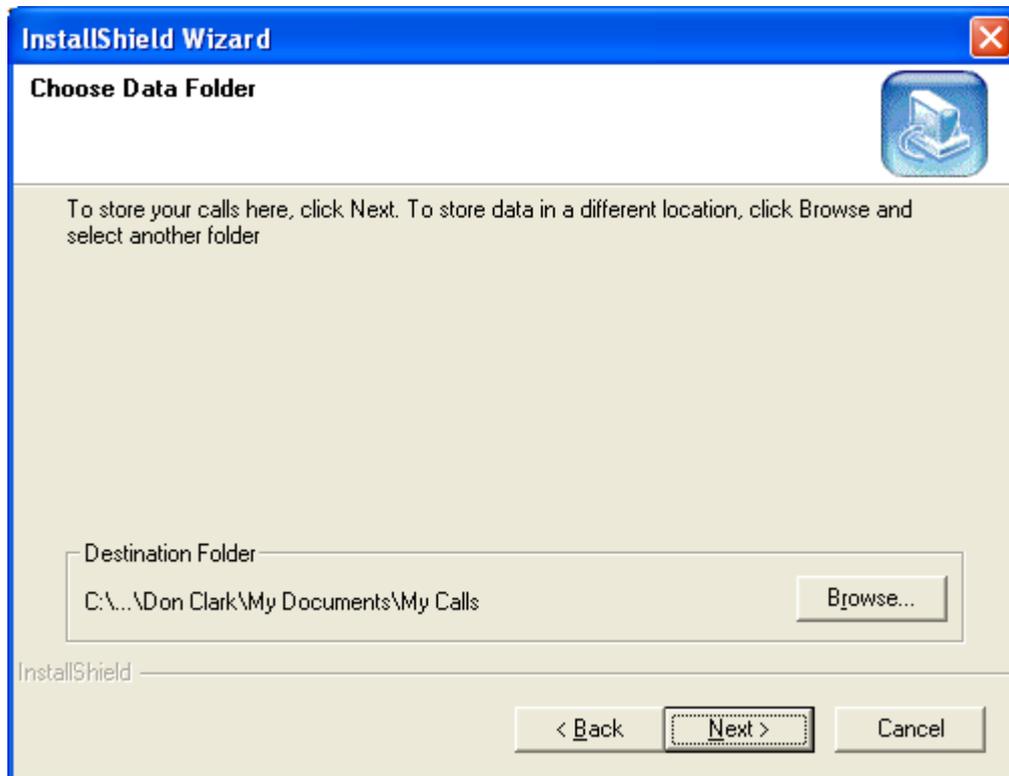
Select Next to select the default Data folder (recommended).

InstallShield Wizard

InstallShield Wizard Complete

Setup has finished installing Xtension Recorder for Universal Adapter 3 on your computer.

Installation complete.

Press finish to run Xtension Recorder for Universal Adapter 3 now

< Back   Finish   Cancel
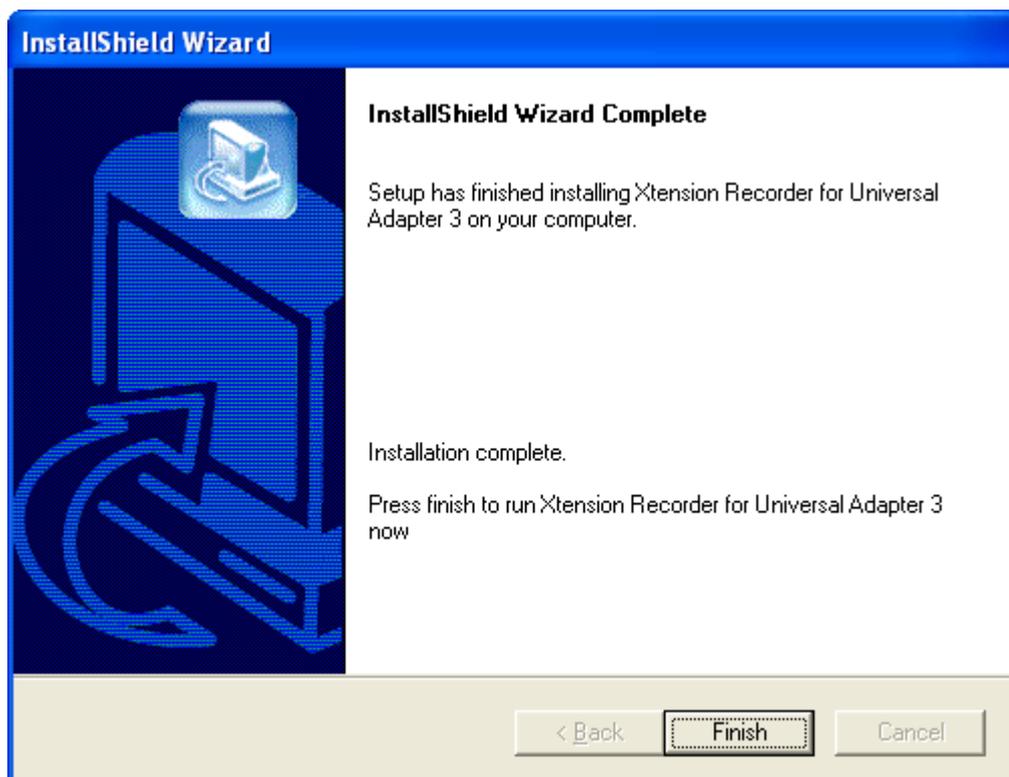
Select Finish to complete the software installation.

Configuring the Universal Adapter 3.0 with the Recorder Setup Wizard.

Once the software has been installed the Recorder Setup Wizard will launch and step you through the setup of your Universal Adapter 3.0.
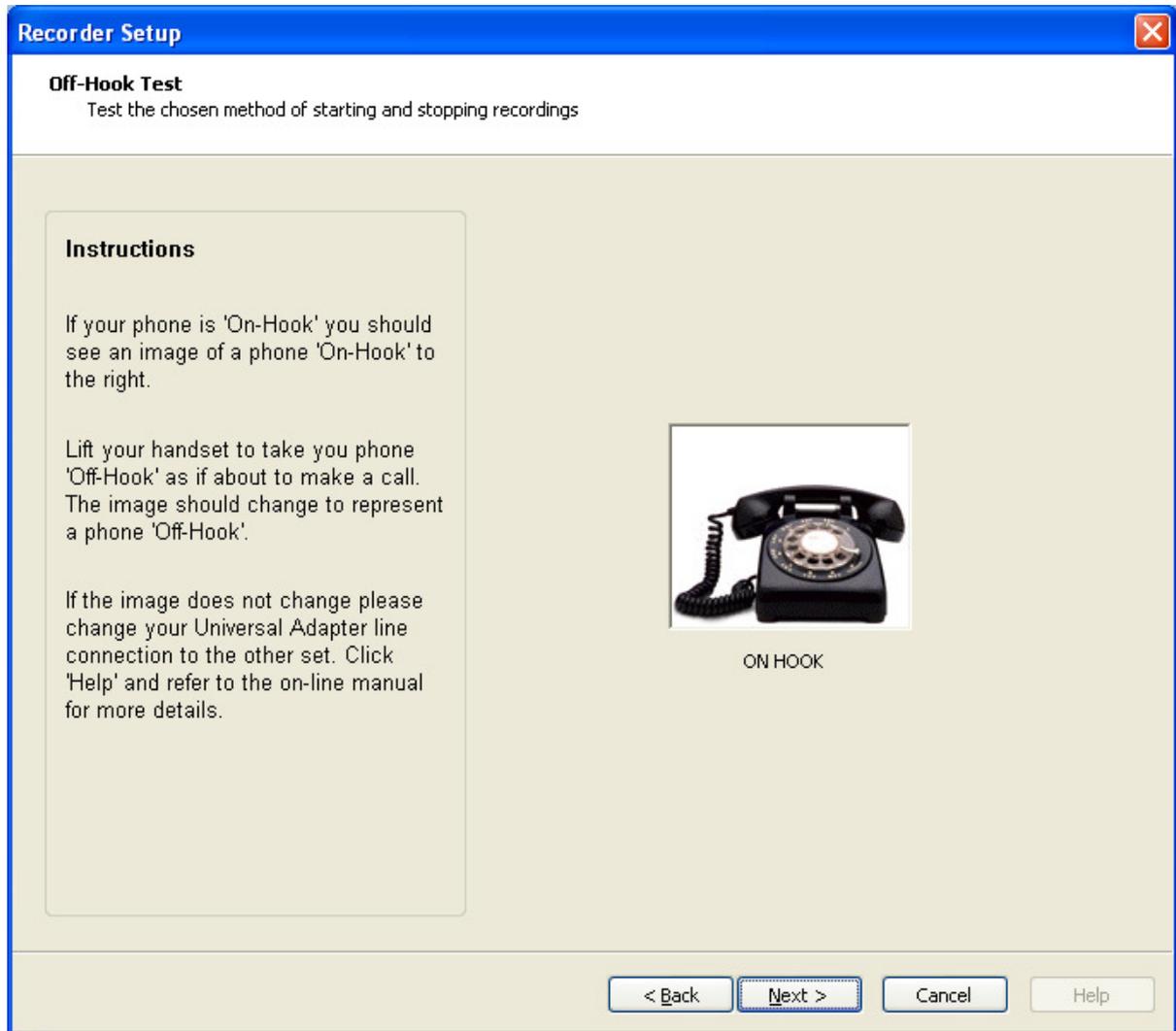

Select Next to Continue. If you are unsure of your administrative privileges click the "Save Test" button before continuing.
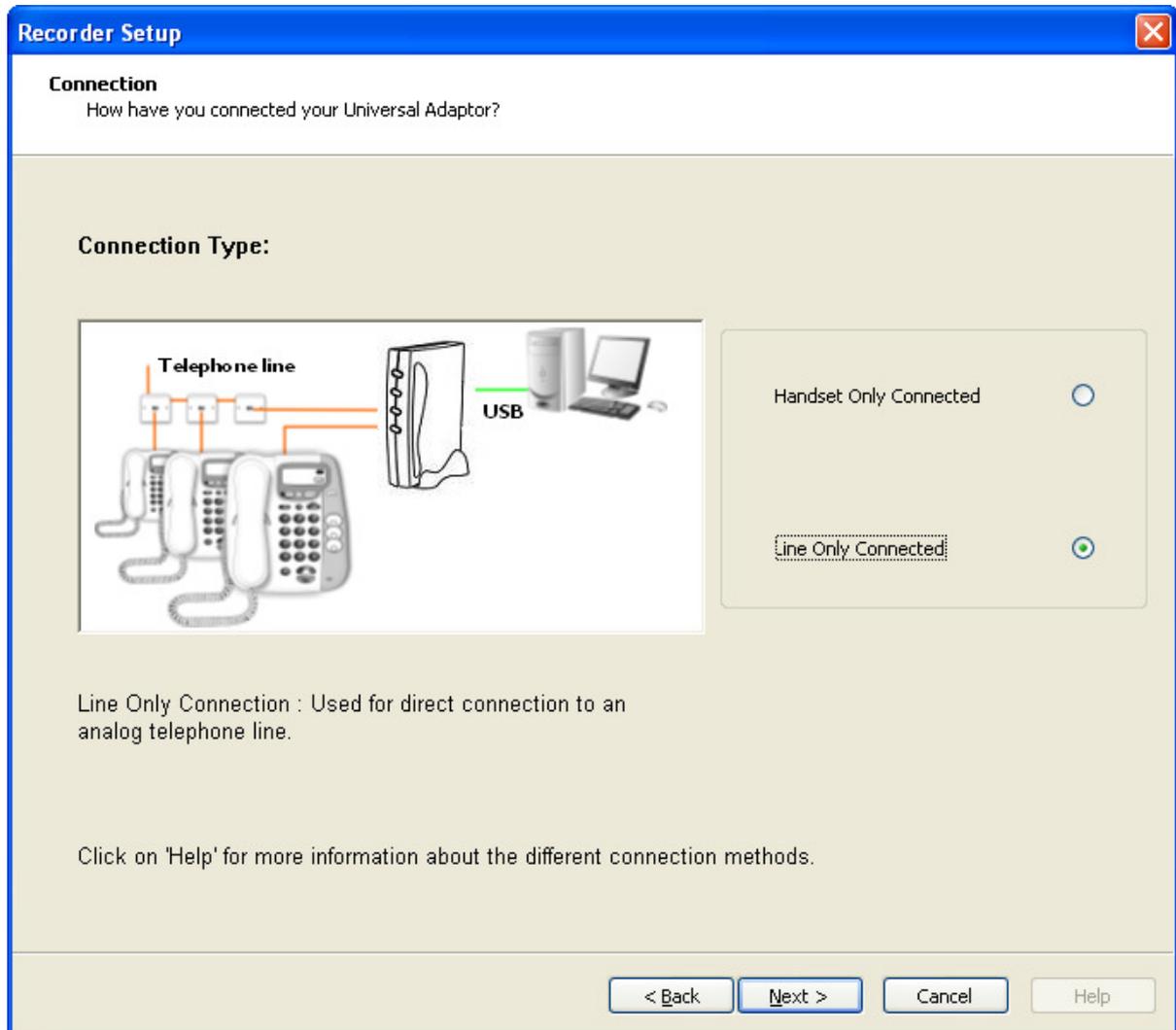
If the Universal Adapter 3.0 is being set up as Line Connected – select "Line Only Connected" as shown above and continue through the setup as below.

If you will be setting the Universal Adapter 3.0 up in Handset Mode – Select Handset Only Connected and go to the "Handset" wizard instructions at the end of this section.

Recorder Setup

Off-Hook Test
Test the chosen method of starting and stopping recordings

Instructions

If your phone is 'On-Hook' you should see an image of a phone 'On-Hook' to the right.

Lift your handset to take you phone 'Off-Hook' as if about to make a call. The image should change to represent a phone 'Off-Hook'.
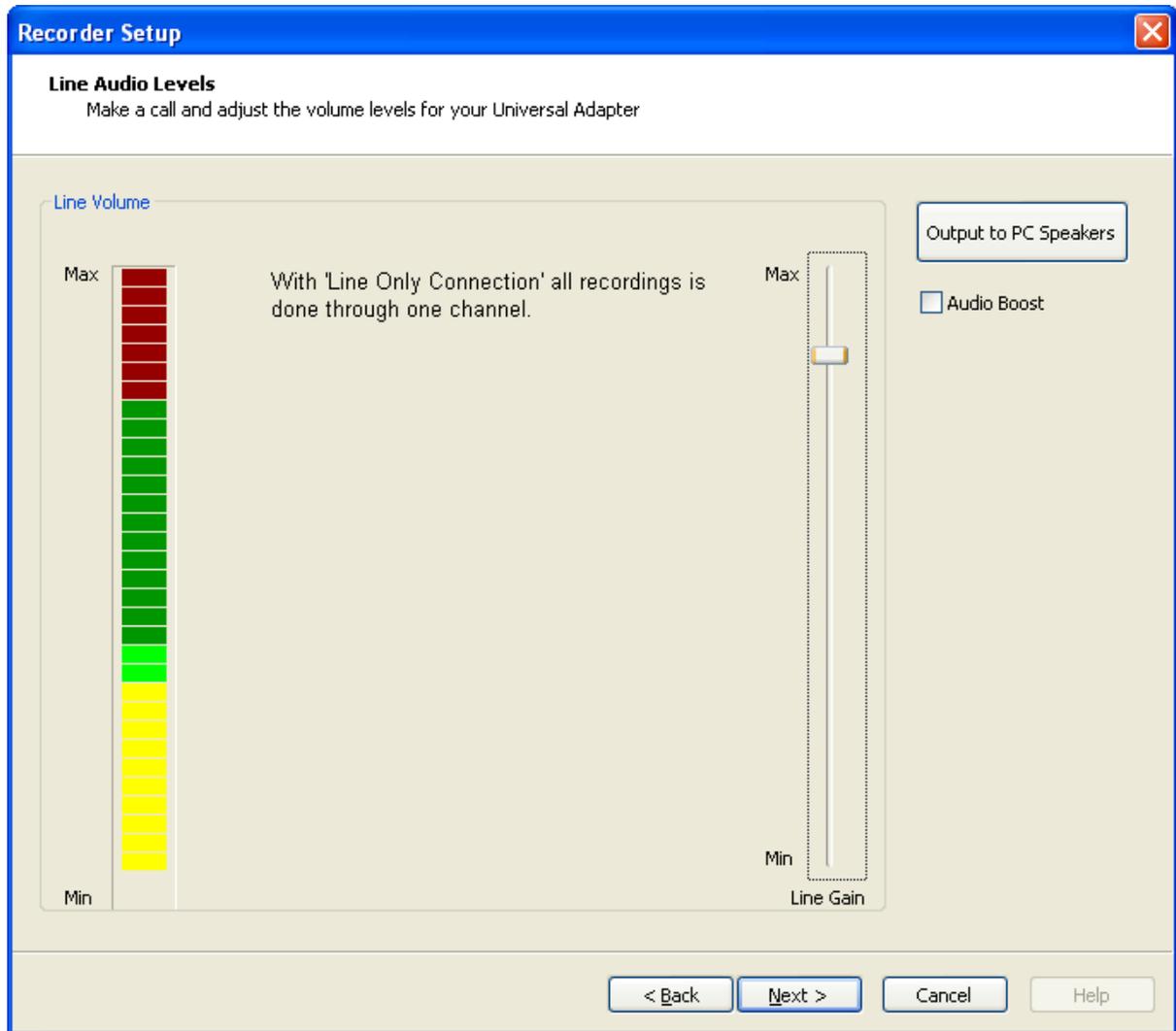
If the image does not change please change your Universal Adapter line connection to the other set. Click 'Help' and refer to the on-line manual for more details.

ON HOOK

[< Back] [Next >] [Cancel] [Help]

Lift the handset of your telephone – the picture of the telephone should change to "Off Hook" to verify the installation is correct (see Below).

Recorder Setup

Off-Hook Test
Test the chosen method of starting and stopping recordings

Instructions

If your phone is 'On-Hook' you should see an image of a phone 'On-Hook' to the right.

Lift your handset to take you phone 'Off-Hook' as if about to make a call. The image should change to represent a phone 'Off-Hook'.

If the image does not change please change your Universal Adapter line connection to the other set. Click 'Help' and refer to the on-line manual for more details.

OFF HOOK

< Back   Next >   Cancel   Help

Telephone in Line Mode in with Off Hook condition.

Recorder Setup

Line Audio Levels
Make a call and adjust the volume levels for your Universal Adapter

Line Volume

Max

With 'Line Only Connection' all recordings is
done through one channel.

Min

Max

Min

Line Gain

Output to PC Speakers

☐ Audio Boost

< Back   Next >   Cancel   Help

Click on "Output to PC Speakers" button and then use the slide bar to adjust
the audio levels of your recorder. Normal conversation should be in the
Green zone.

Recorder Setup

Dialled Digits Check
Check that the Universal Adaptor can recognises the digits you dial and adjust the settings

Instructions

Lift your phone handset and press some numbers. The digits should appear in the box to the right. Click 'Help' for more information on the other settings.

[Clear]   55555555   Dialled Digits

[< Back] [Next >] [Cancel] [Help]

Lift your handset and press numbers on your dial pad to verify digits are being recognized.

Recorder Setup

Recorder Setup Complete!

You have completed the Setup Wizard for your Universal Adapter. Please click finish to SAVE your settings.

If you want to alter your settings in the future, you can return to the Setup Wizard by selecting the Setup Wizard desktop icon or accessing through your Program Group.

< Back | Finish | Cancel | Help

Your recorder is set up – click on Finish to start your recorder.

Xt Recorder - Choose Defaults

Thank you for choosing Xt Recorder from Intelligent Recording

Tell us how you would like Xt Recorder to record your calls.

Don't worry, you can change all these settings later in the Xt Recorder options.

◉ **Record all calls**

Automatically record every call I make, and save it forever.

This will use a large amount of disk space. I will manually delete surplus files.

○ **Prompt after call**

Prompt me at the end of every call to decide whether I wish to keep or delete that call.

OK

Select whether to automatically record calls and whether you want to use prompts.

<u>Handset Setup Instructions</u>

If you are setting the device up in Handset mode follow the steps below:
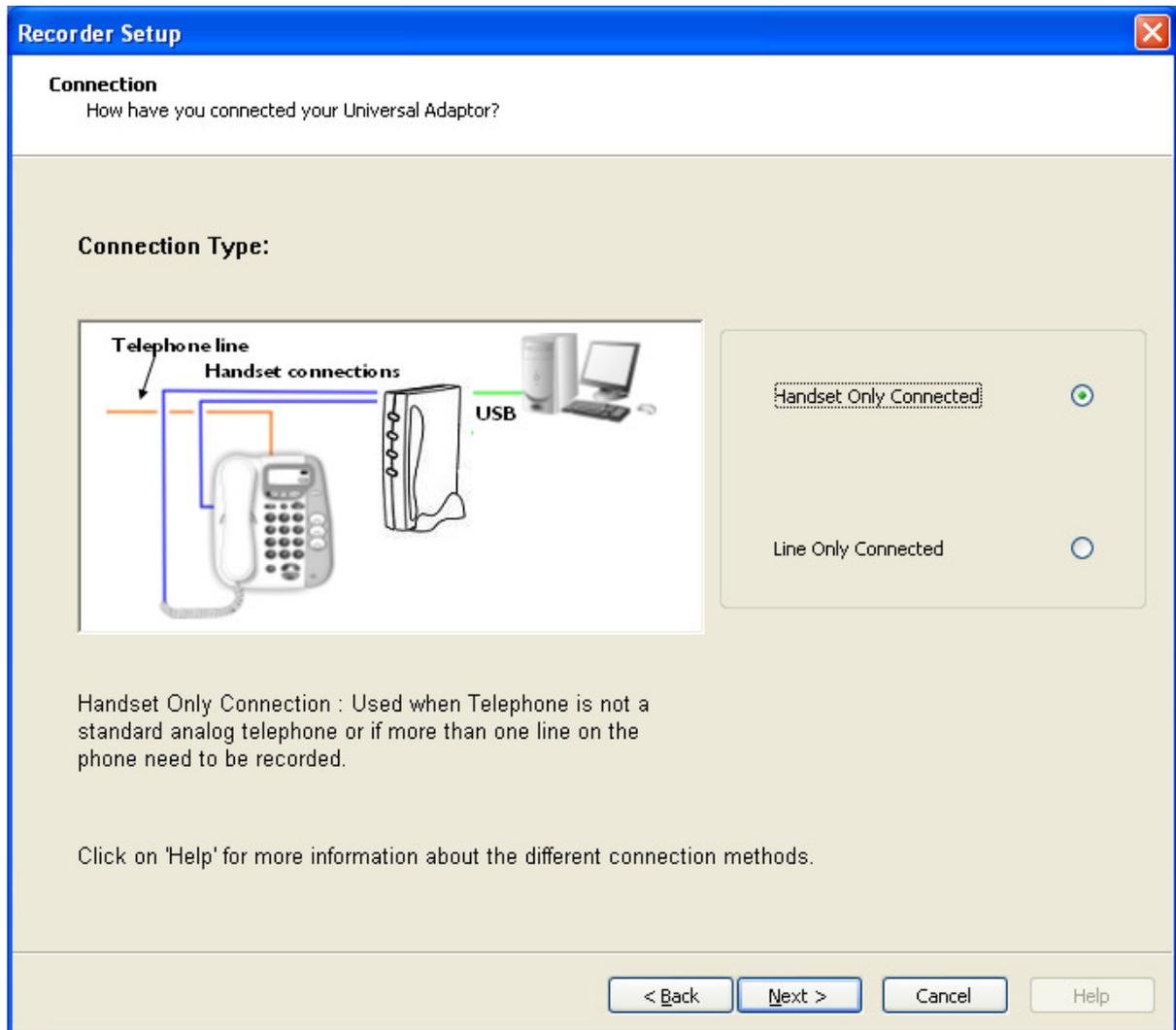
If you will be using Handset mode, select "Handset Only Connected" and click Next.

Recorder Setup

Mic Audio Levels
Make a call and adjust the mic volume levels for your Universal Adapter

The switches on the back of the device allows for a variety of handset wiring possibilities.

In default most telephones should be set to A-1:

HANDSET   TYPE

A [■] B   1 [■]   2

Adjust the Mic Gain so that normal conversation is in the Green Zone using the slider on the right.

If you do not see the Mic level changing, adjust the switches. First try A-2, then B-1 and finally B-2.

Max

Min

Max

Min

Mic Gain

☐ Audio Boost

[< Back] [Next >] [Cancel] [Help]

Adjust the Mic Gain using the slide bar so that normal conversation is in the Green Zone. The default setting for Handset Type is A-1. If the Mic level does not change, follow the onscreen directions to change your handset type with the A/B and 1/2 switches. Use the Audio Boost feature if the slide bar will not adjust to the green zone for normal conversation.
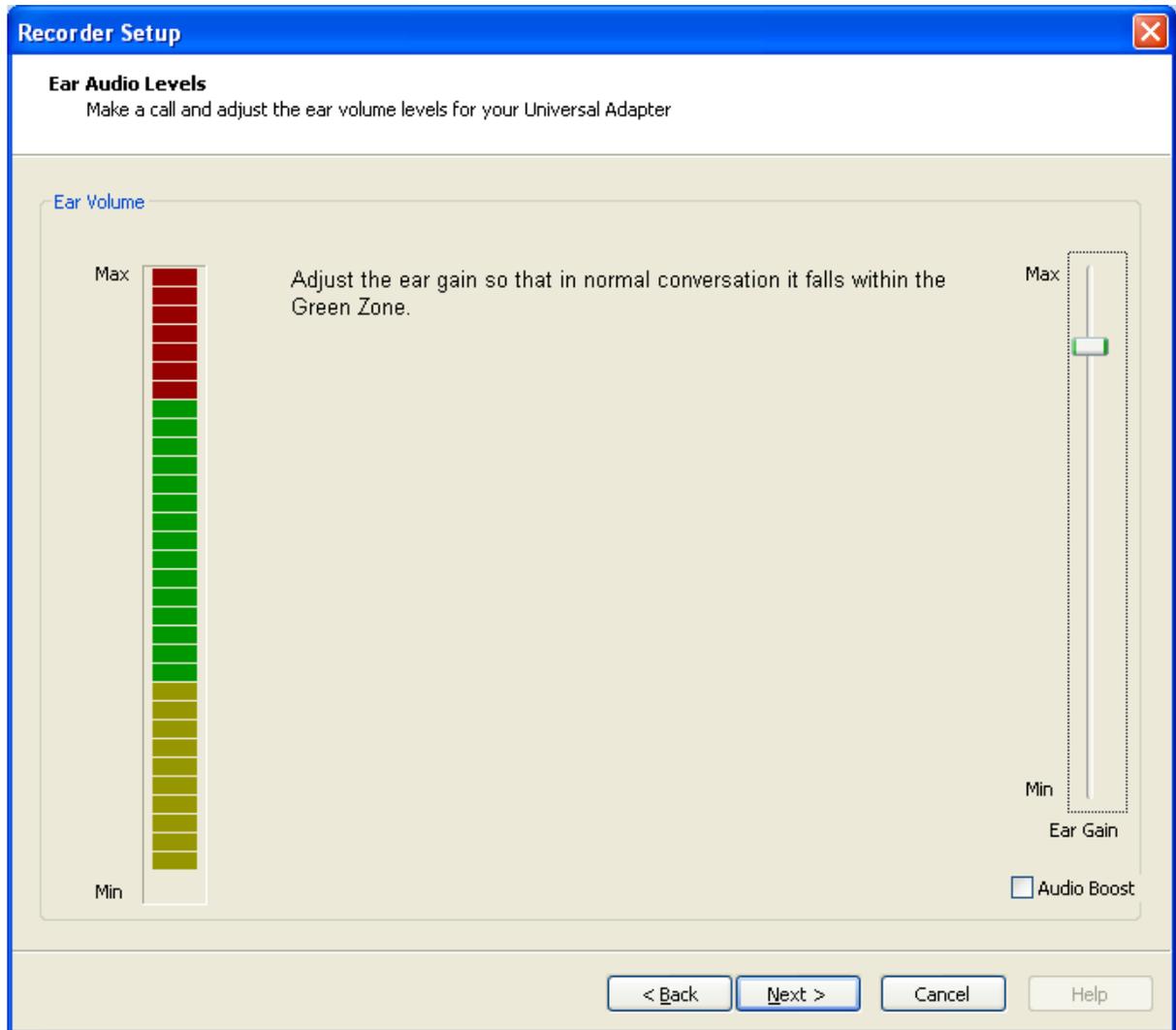
Use the slide bar so that normal conversation is in the green zone.

Recorder Setup

Voice Trigger Levels
Adjust the Voice Trigger Levels to start and stop call recording

Place the handset on hook.

Adjust the Idle Threshold to above the Output Level.

Continue until IDLE DETECTED is shown continously.

Output Level (%)	58
Idle Threshold (%)	1
Idle Timeout (1 to 20) seconds	8

Lift the handset off hook.

Adjust the Ear Start Threshold so that START DETECTED is shown while dial tone is being heard.

Higher values are more sensitive.

Make a real call, and check that:
• START DETECTED shows when you go off hook.
• RECORDING shows during the call.
• IDLE DETECTED shows when you hangup.

Mic Start Threshold (%)	94
Ear Start Threshold (%)	94
Voice Trigger on Mouth	☐
Voice Trigger on EarPiece / Tel Line	☑
Recording State	🔴 NOT RECORDING

[< Back] [Next >] [Cancel] [Help]

Set the voice trigger levels for Start and Idle so that the recorder is recording during conversation and idle during quiet.

Your recorder is set up – click on Finish to start your recorder.

Program Settings

The Xtension Recorder application software when loaded is accessible through a desktop shortcut as well as by right-clicking on the icon that is loaded in the system tray of the PC. This system tray icon will also flash yellow and red to indicate an active call being recorded.

The View Options tab enables the installer and or user to set up the options available for that user. Once set, this view can be eliminated to the user, thereby making it impossible for them to change (see Advanced Setup Options).

Automatically Record Calls

This setting determines whether all calls are automatically recorded or if the recorder is intended for Manual Start/Stop only. Other options to record only incoming or outgoing calls may not available on all installations depending on line provider and type of telephone instrument being used. For those installations that can identify incoming versus outgoing calls, these options are available. By selecting the 'Prefix' option, a '<' sign will be placed in front of the Caller ID to identify and incoming call and a '>' sign designates an outgoing call. In the case where the software cannot distinguish between incoming or outgoing it will be identified as 'unrecognized' and a '?' will be placed as a prefix.

Record Format - allows the user to select the recording format.

'Perfect Digital Recording' stores the recording in the PCM format taken directly from the recording device. This is the highest quality possible but can use a significant amount of space on the PC disk (35 Hours per GByte).

'GSM 06.10' (recommended) uses a compression technique to store the recording more efficiently (168 Hours per GByte). In practice, the difference in discernable quality is negligible so the default is for this format to be selected.

Call Selection

This setting determines the minimum length of a call that is saved. All calls are recorded from the very beginning of the call, but unless the call lasts longer than the period set, it will not be saved. This prevents short calls, miss-dials, etc from being saved.

Call Information

Prompt at Start of Call option will pop forward the Recorder View window. Note, this will occur any time the Recorder is active, even on very short calls.

Prompt at End of Call option is often preferred, as this will pop a box that allows the user to Save or Delete the call (if enabled) and also to add notes about each call if desired (shown below). This screen pop will only occur if the call has lasted the minimum period as defined in previous option.
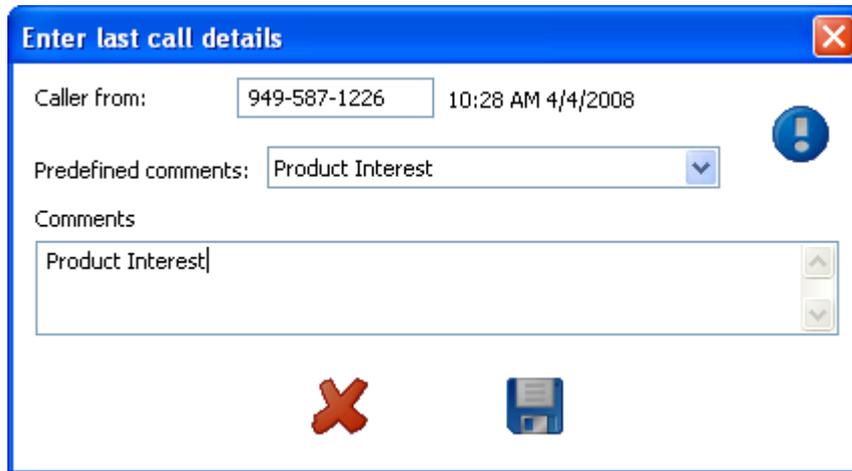
Example of Call Detail screen.

Record Levels
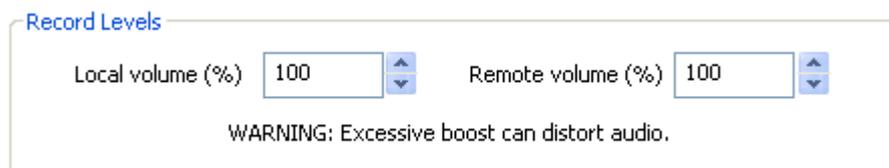
Each user can adjust the Recording Levels of either side of the conversation. The Local Volume is the recording level of the user; the Remote volume is that of the outside caller. If left at the default of 100% and 100%, no adjustment is made to the recording. Often the outside party is more difficult to hear in the recording due to level loss on the line; in that case an adjustment can be made to boost the level to the desired level. It is also possible, and often desirable, to decrease the volume if the Local side is too loud in the resultant recording.

Call Storage Settings
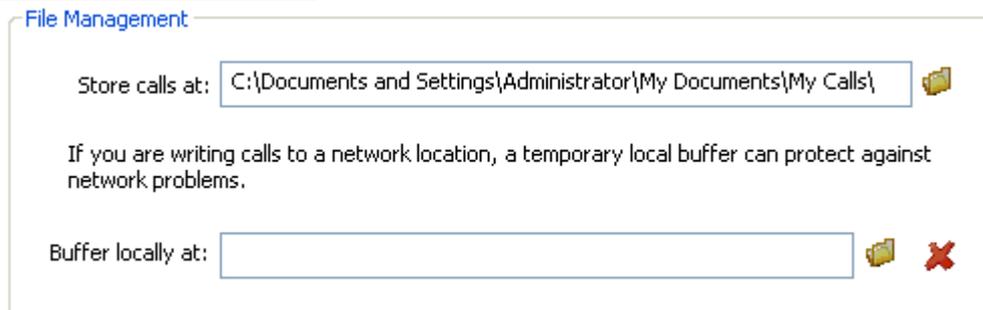
If the local user desires to manage their own calls, then using the default storage location created is often preferred, a My Calls folder is created under My Documents.

If however, the calls are to be stored on a Network Drive for **Centralized Call Management**, then it is recommended that a local Buffer location be

created on the Local PC. When a Local Buffer is created, the live call is buffered in the folder created (i.e. C:\Buffer) as an '.xtr.tmp' file. Once the call is completed, the recorder checks if the network location is available and if so, sends the call to the network storage location. If the network is not available, calls will continue to be recorded in the Buffer location. When one call is successfully sent to the network location, the entire buffer will also be transferred with no user intervention required.

Auto-Delete

This option automates the task of deleting calls after a predefined time or after a certain amount of space has been consumed. Note, any calls marked as Important will not be Auto-Deleted by this routine.

Advanced Program Settings

Comvurgent has also provided the dealer or user the option of making additional adjustments to the use and functionality of the user interface.

Customize Pre-Defined Comments

Located in the Program directory, which is loaded in default to C:\Program Files\Comvurgent\XT Recorder, you will find a file called Comments.txt. To edit this file, open with Notepad and it will display the content as shown below:
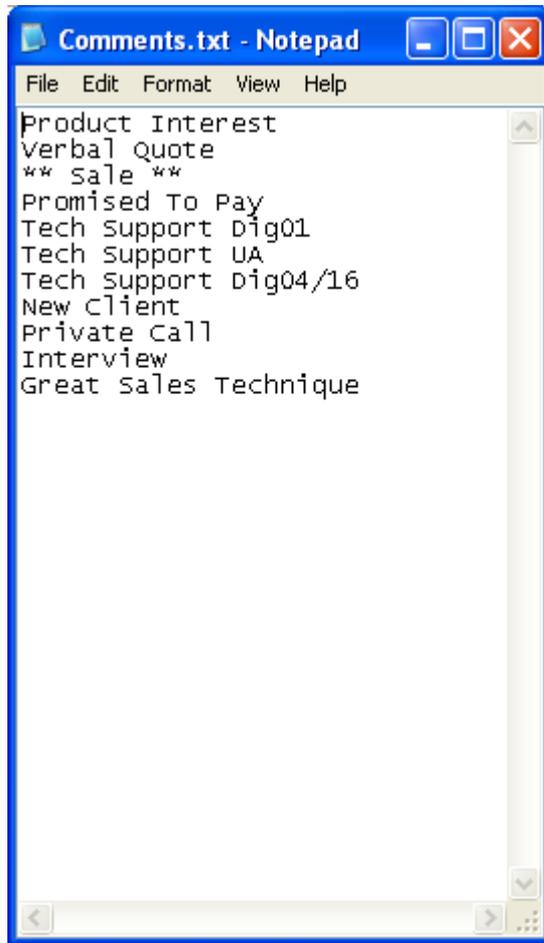
Simply type in a column any number of comments and how you would like them to appear.

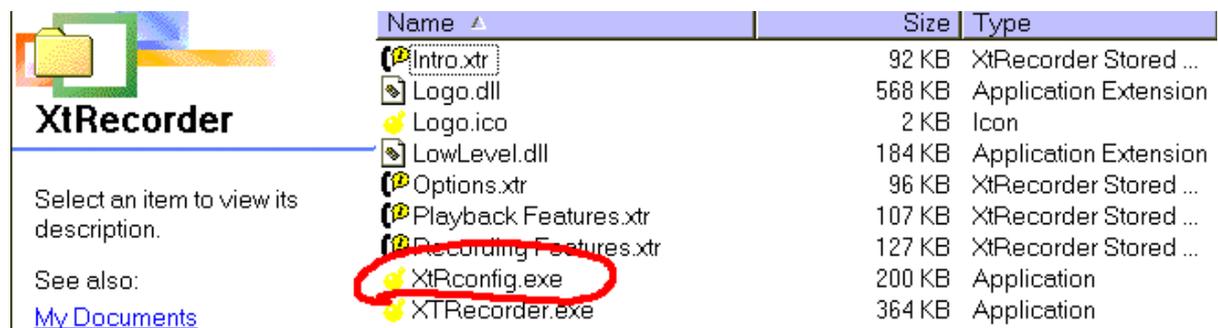Once completed, select File>Save and replace the existing Comments.txt file.

The new list will then appear in your drop-down menus.

This will place the selected text in the comments field; more text can be appended to the notes if desired.
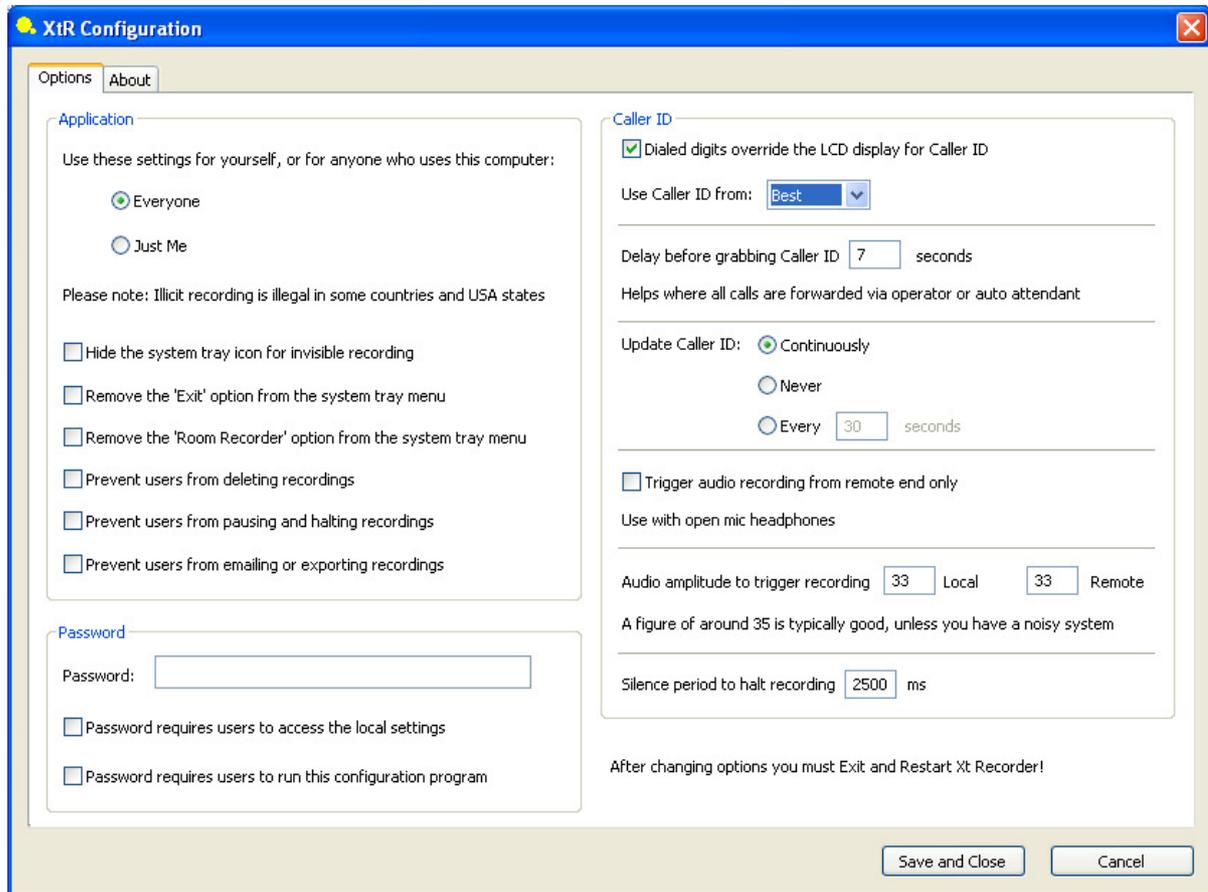
Restricting Access to Features and Functions

This configuration program can only be accessed by browsing to the installation location (default C:\Program Files\Comvurgent\XtRecorder) and then clicking on the XtRconfig.exe file circled below:

Note: The customer takes all responsibility to ensure they are meeting legal requirements. Comvurgent provides the user option settings in order to meet customer demands and cannot be responsible for the miss-application of the product.

This opens the following program:

Installing on Shared PC

This first setting is used when installing on a PC that has multiple user log-on Ids. If it is preferred that all calls, regardless of the user that is logged in, are stored in the same folder and have all the same settings- then select the 'Everyone' option.

> Note- the User ID Header on each recording is taken from the PC User Log-in ID, so if each user logs into the PC with a unique login the recordings will be searchable and sort-able by the various User Ids.

It is also possible to have each user have their own settings, i.e. different storage folders etc. If this is desired select the 'Just Me' option. It will then be necessary to install the application under each user log-in on the PC.

Restricting Features and Functions

The following features can be restricted on a per user basis:

☐ Hide the system tray icon for invisible recording

☐ Remove the 'Exit' option from the system tray menu

☐ Remove the 'Room Recorder' option from the system tray menu

☐ Prevent users from deleting recordings

☐ Prevent users from pausing and halting recordings

☐ Prevent users from emailing or exporting recordings

Caller ID and Trigger Options

It is sometimes necessary to adjust how the recorder reads the Caller- ID information delivered to the telephone. (Note- not all versions capture Caller-ID info, please check with your re-seller).

```
┌─ Caller ID ──────────────────────────────────────┐
│                                                   │
│  ☑ Dialed digits override the LCD display for Caller ID │
│                                                   │
│  Use Caller ID from:  [Best        ▼]             │
│  ─────────────────────────────────────────────    │
│                                                   │
│  Delay before grabbing Caller ID  [7    ]  seconds │
│                                                   │
│  Helps where all calls are forwarded via operator or auto attendant │
│  ─────────────────────────────────────────────    │
│                                                   │
│  Update Caller ID:   ⦿ Continuously               │
│                                                   │
│                      ○ Never                      │
│                                                   │
│                      ○ Every  [30   ]  seconds    │
│                                                   │
└───────────────────────────────────────────────────┘
```

The Recorder software reads the data for Caller-ID from the information provided your line carrier. For analog phone lines leave this setting at "Best" (the other options are for different interface devices)

Dealing with Headsets or 'Hot Mics'

☐ Trigger audio recording from remote end only

Use with open mic headphones

Check this option if you find the recorder is either not stopping recording consistently, or triggers with background office noise while not on the telephone.

Sensitivity Adjustments

Audio amplitude to trigger recording | 33 | Local | 33 | Remote

A figure of around 35 is typically good, unless you have a noisy system

Silence period to halt recording | 2500 | ms

In the vast majority of cases no adjustments are needed here. With some lines a start/stop trigger for recording is based on a signal level, to make these triggers more sensitive lower the values above, less sensitive raise them.

Password

Password

Password:

☐ Password requires users to access the local settings

☐ Password requires users to run this configuration program

The above option for accessing Local Settings eliminates the ability for the user to access the Options View of the software. This prevents them from changing any and all options that are preconfigured.

The second option requires the Password in order to access the XTRconfig Program.

> **Important!** For any changes made in the XTRconfig Program to take effect, the application must be Exited (choose exit from sys tray menu) and restarted.

Xtension Recorder Desktop Software User Interface

The Xtension Recorder application software when loaded is accessible through a desktop shortcut as well as by right-clicking on the icon that is loaded in the system tray of the PC. This system tray icon will also flash yellow and red to indicate an active call being recorded.

View Recorder
View Room Recorder
View Player
View Options

About

Exit
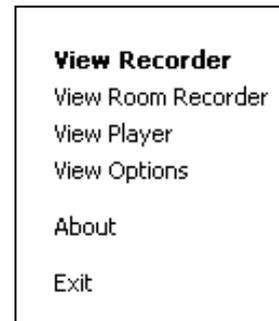
View Recorder
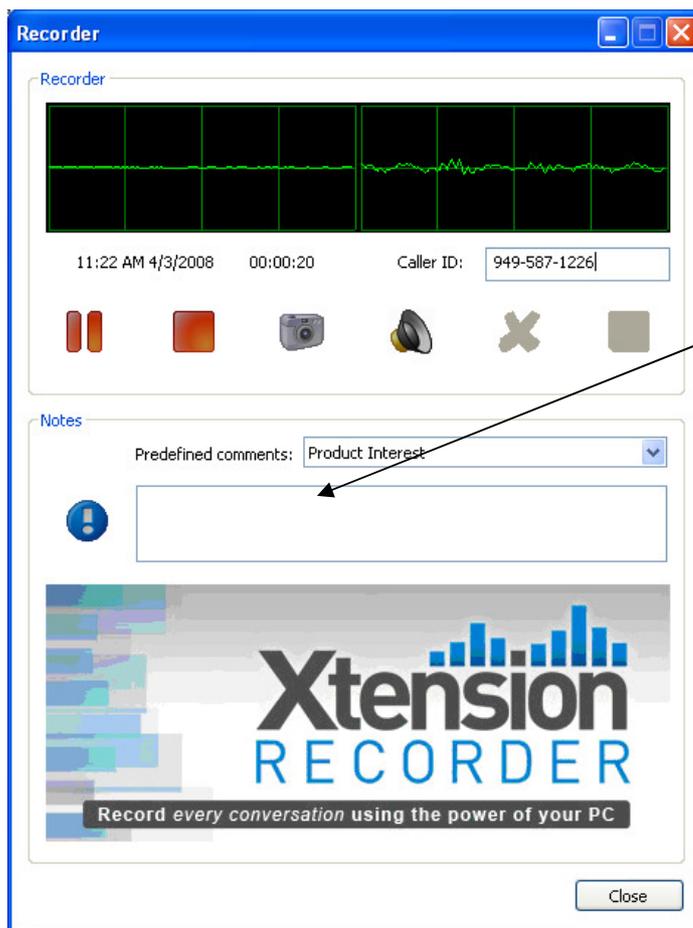
This view allows the user to interact with the live recording if desired. The user can pause or stop

  the recording (if enabled) as well as add notes about the call either by typing in as desired or selecting from a list of predefined comments that can be customized by each user- see page 7 of this document.
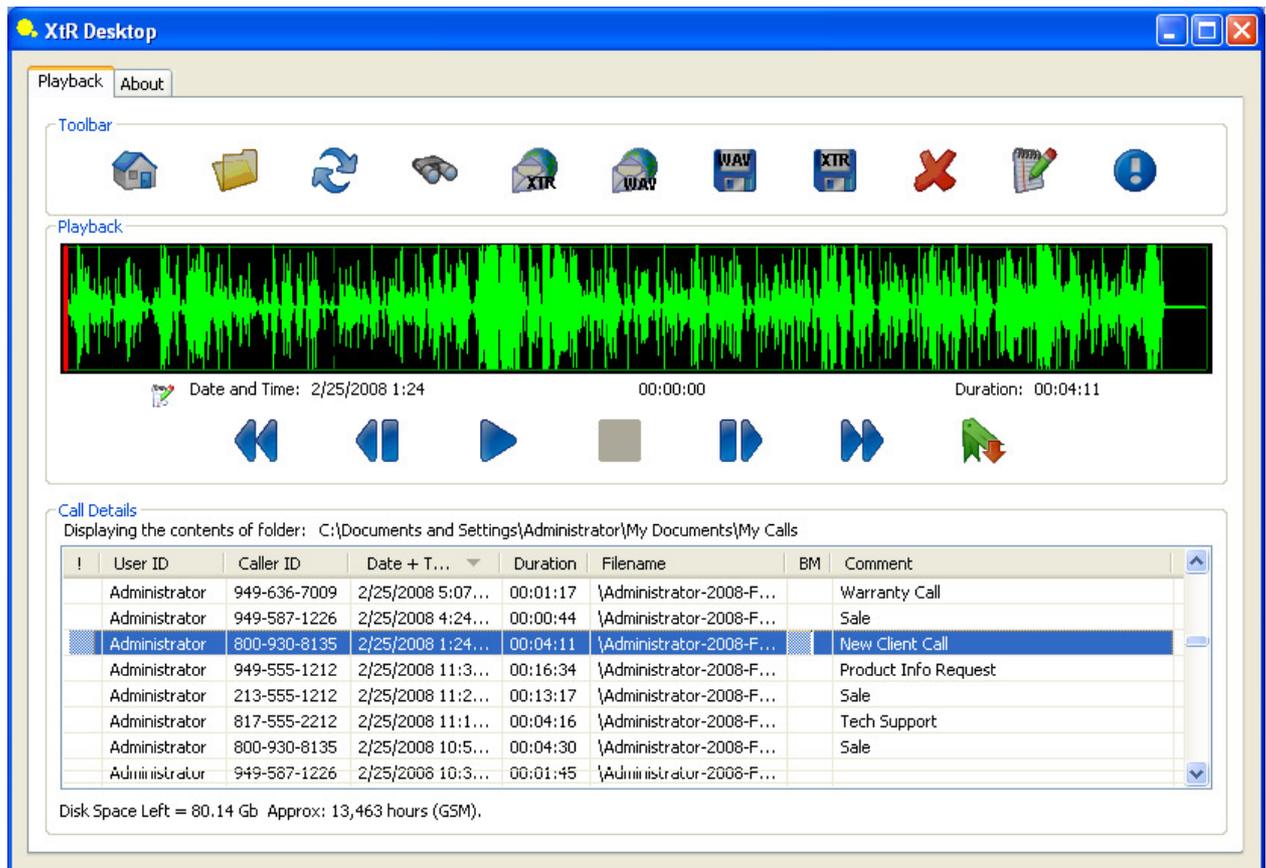
By clicking on the Snapshot Icon, the current call is placed into the Player for immediate playback while continuing to record.

The Speaker icon routes the audio from both sides of the recording through the PC Speakers. (Note: there is a slight delay as this is not the 'live' call, but a recording of what has just occurred).

View Player

The **Basics of the Player** are quite simple. In default, the player will be directed to your storage folder that is set up in the Options Area under File Management. By selecting the **Home** icon the Player will return to view calls from this location.

While this view is displayed, new calls will appear as they are generated. You can view calls from other locations by selecting the **Browse** function and selecting the location from which to view calls, either on your local PC or network location.

The **Refresh** option will perform a new scan of the folder in view.

Select **Search** to enable searching for calls in view by User ID, Caller ID/Number Dialled, Comment or All. The search will then bring into view results from the current view that matches your criteria.
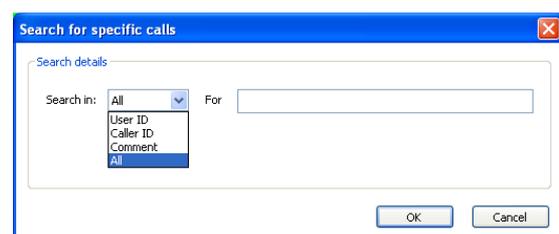
To return to previous view, select the Refresh option.

E-Mailing Recordings

E-Mailing recordings couldn't be easier. To email as a proprietary and secured formatted recording select the first email icon option. This will attach the recording to an outbound email message; an auto-text will be generated with a link to where the recipient of the email can download a free player.

The other E-Mail option is to select the **E-Mail as WAV** icon , this first converts the recording to a wav file, then attaches to an outbound e-mail message.

Save Files to Other Locations / Convert Direct to WAV Format

It is often desirable to **Save and Move** important calls from one storage location to another. This is done quickly and easily by selecting the recording in the Player then clicking on the Save icon. This XTR option will save the recording to another location in the native '.xtr' file format. By selecting the **WAV** option, it will convert the file to a WAV format and then allow the recording to be saved in the desired location.

Deleting Recordings

To delete an unwanted call, simply select the call or calls and then press the Delete icon

> Note: The ability for a user to Stop, Pause, Email, Delete, and Convert Recordings as well as view the player and sys tray icon can be restricted on a per user basis. This is explained in the Advanced Set-Up Options located within this document.

Adding Notes to a Recording

By selecting the **Notes** icon , the user can add notes to be stored as part of the call record.

Any item in the notes filed can then be used later to find the particular call.
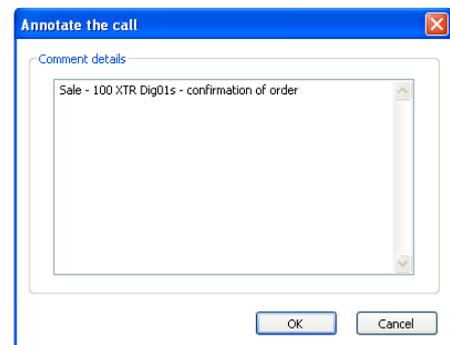
Bookmark

A Book-Mark can be added to a Recording at any place. This can be used to highlight an important part of the call making it easy to find in the future. To Bookmark a part of the recording simply select Bookmark icon at the point desired and the graphic will display the area book-marked in blue as shown below:
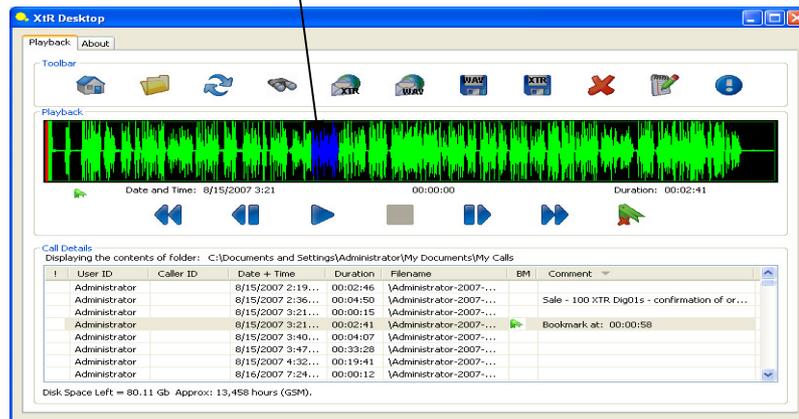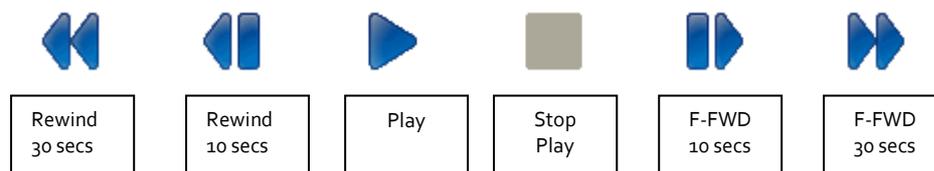

Important Calls

Calls can be marked as **Important** by selecting the call and clicking on the Important icon. This will highlight the call in the list as well as remove it from any auto-delete routine established in the Options Area.

Playing Calls

Click on the desired recording in the Play Back List and the call select will be loaded into the Player. You can 'click' on the wave form in the player to move from one point in the recorder to another or use options shown below:

Rewind 30 secs	Rewind 10 secs	Play	Stop Play	F-FWD 10 secs	F-FWD 30 secs

Sorting Calls in View

Calls loaded into View in the Player can be sorted by each individual column by clicking on the column header. For example, sort for all 'important' calls, or perhaps all calls that have comments associated with them. To return to the previous view, simply hit the Refresh icon.

Call Details
Displaying the contents of folder: C:\Documents and Settings\Administrator\My Documents\My Calls

!	User ID	Caller ID	Date + T... ▼	Duration	Filename	BM	Comment	
	Administrator	949-636-7009	2/25/2008 5:07...	00:01:17	\Administrator-2008-F...		Warranty Call	
	Administrator	949-587-1226	2/25/2008 4:24...	00:00:44	\Administrator-2008-F...		Sale	