



XTR Administrator Software

Call Manager and XTR Reporter Pro

User Guide

Version 6.0

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www.usbcallrecord.com

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Introduction

Congratulations on the purchase of the Xtension Recorder and the associated Administration Software, Call Manager or Reporter Pro. The purpose of this document is to describe the features and functions that each has in common as well as the advanced Reporting and Scoring functions of XTR Reporter Pro.

XTR Reporter Pro is part of an exciting range of cost-effective Digital call recorders from Intelligent Recording Limited.

This user guide will take you through the installation and setup of the XTR Reporter Pro and help you begin using the advanced search ,playback, reporting and scoring features provided.

Important Notes:

For support and product information and manuals please go to our website www.usbcallrecord.com .

Caution! The use of monitoring, recording or listening devices to eavesdrop, monitor, retrieve or record telephone conversations 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 XTR Reporter Pro software supplied will work on recent Microsoft operating systems including 2000, XP and Windows Vista 32 bit systems. **Note:** Windows 95, 98 NT and Macintosh are not supported.

Contents

Check the package contents:

- 1 x XTR Reporter Pro CD
- 1 x XTR Reporter Pro Dongle Protection Device

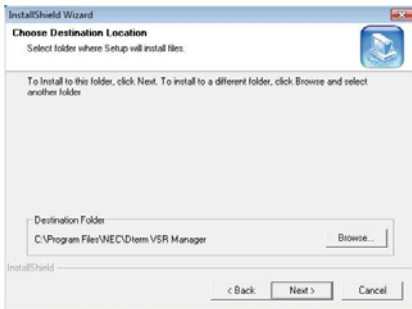
Installation Process

Insert the CD provided into your PC CD/DVD drive and follow the instructions:

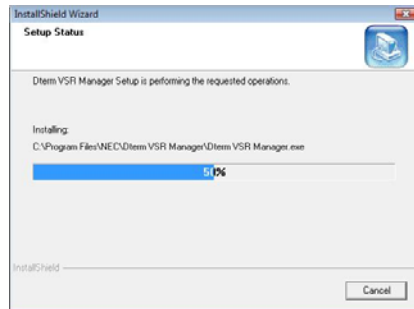


The Box on the left will appear,

Select YES to agree to licensing agreement



Using the Browse button, select path you wish to install the XTR Reporter Pro, we suggest you use the default location provided.



This dialog shows the installation progress



By selecting Finish the XTR Reporter Pro software program will be completely installed.

Software Protection Devices

XTR Reporter Pro is provided with a software protection device that must be installed in a USB Port in the computer you are using.

Important Note: XTR Reporter Pro will not operate without the USB key installed.

There are two versions of USB dongle supplied. It is most likely that you will have the Secure DongleX device with your XTR Reporter Pro, however, if you are upgrading from an older version of XTR Reporter Pro, you may already have the MatrixLock USB Device and may be required to exchange for a new device.

SecureDongle X USB driver installation

The SecureDongle X uses a driver included in the Windows operating system. When the SecureDongle X is inserted into the USB port, the operating system will prompt you to install a new device, which will then install automatically. You will then be able to use the XTR Reporter Pro.



MatrixLock USB

If upgrading from an older version of XTR Reporter Pro, please contact your reseller in order to obtain the new USB keys.



Starting XTR Reporter Pro

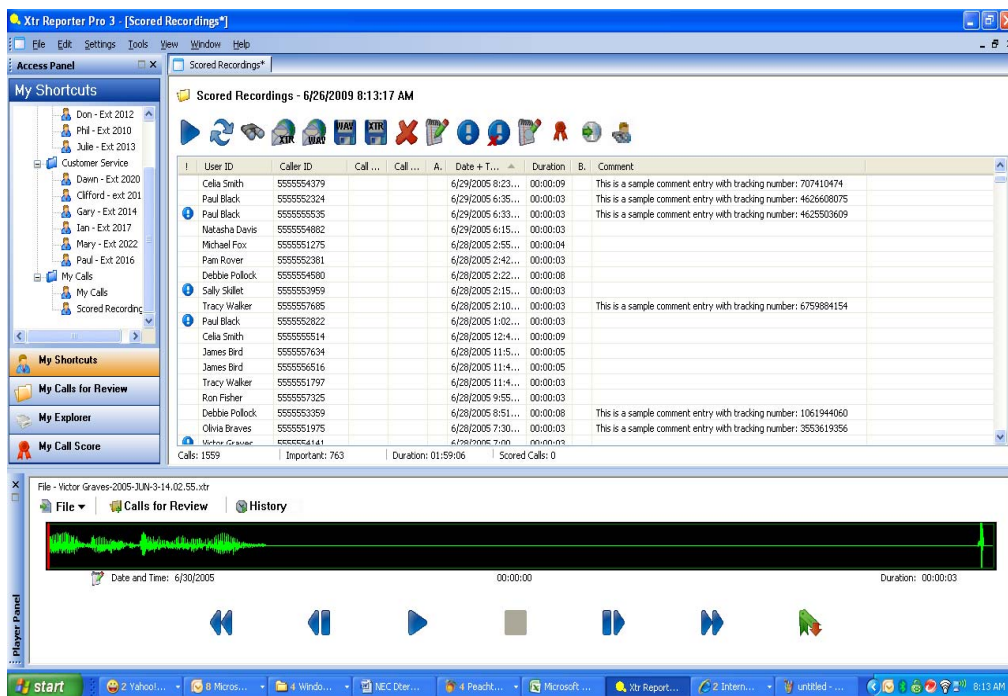
XTR Reporter Pro can be started by locating the XTR Reporter Pro Desktop Icon and double clicking or by choosing the XTR Reporter Pro option in your Windows Start Menu(s).



XTR Reporter Pro will now start – please ensure the dongle protection device is installed before starting.

Main Window Interface

The Main window is the XTR Reporter Pro application window which appears when the application starts



Main Menu

- The Main Menu provides access to the primary application controls.
- It is located at the top of the Main Window under the window caption.

Access Panel

- The Access Panel is a dynamic panel group of physical and virtual trees which provides access to recordings.
- The group is comprised of:
 - My Explorer Panel
 - My Shortcuts Panel
 - My Calls for Review Panel

Recordings List

- Recordings Lists form the core of XTR Reporter Pro.
- Recordings Lists provide an interface to interact with recorded calls for tasks like viewing, search & data-mining, editing, playing, emailing, and managing calls.
- Recordings Lists are document windows which appear in the centre of the Main Window.

Player Panel

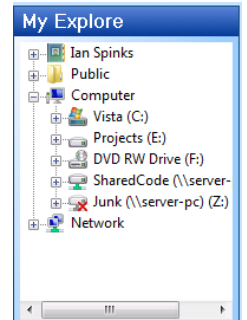
- The Player panel is a dynamic container which houses the Player.
- All XTR Reporter Pro playback and audio controls are handled by the player.

Access Panel Interface and Features

The Access Panel provides access to recordings. The group is comprised of the My Explorer Panel, My Shortcuts Panel, and My Calls for Review panel.

Explorer Panel Features & Functions

- The Explorer Panel is a physical tree of resources, drives and directories accessible from your computer much like Windows Explorer.
- The Explorer functions can be accessed from the Explorer Tree toolbar and right-click menu.
- The Explorer Tree can be used to create Recordings Lists, Shortcuts, append calls to Recordings Lists and copy calls from Recordings Lists.

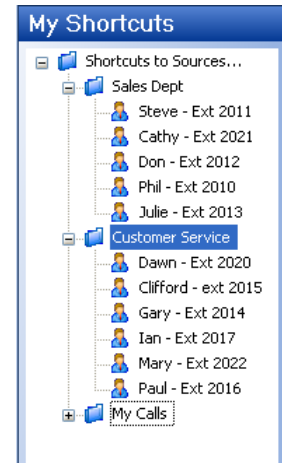


Explorer Panel Functions

Function	Description
Create Recording List	Open the Create Recordings List Window to build a Recordings List from the selected folder.
Add to Shortcuts	Create a Shortcut from the selected folder which appears in the Shortcuts Tree root group.
Explore	Open Windows Explorer focused on the selected folder to display and access the contents of that folder.
Copy Recordings	Drag n Drop selected recordings into explorer window to Copy Recordings into desired folder.

Shortcuts Panel Features & Functions

- The Shortcuts Panel is a virtual tree which can be used to create Shortcuts for quick access to call sources.
- The Shortcuts functions can be accessed from the Shortcuts Tree toolbar and right-click menu.
- A Shortcut can be used to create a Recordings List from the call source it references, bypassing the need for navigation.
- Shortcuts can be organized into folders called Shortcut Groups which provide a method to create a single Recordings List for all shortcuts contained in the Shortcut Group.
- Any number of Shortcuts and Shortcut Groups can be created and named as required.
- Shortcuts and Shortcut Groups can be organized into subgroups.
- Shortcuts and Shortcut Groups are virtual indexes.
- Moving, renaming or deleting Shortcuts has no impact on the actual recorded files.

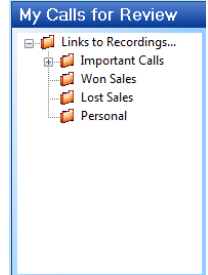


Shortcuts Panel Functions

Function	Description
Create Recording List	Open the Create Recordings List Window to build a Recordings List from the selected Shortcut or Shortcut Group.
Explore	Open Windows Explorer focused on the selected folder.
Select All	Select all Shortcuts in a Shortcut Group
New Group	Create a new Shortcut Group.
New Shortcut	Open a folder dialog to select the resource to Shortcut.
Rename	Enable renaming of the selected Shortcut or Shortcut Group
Clear Shortcuts	Remove all Shortcuts in a Shortcuts Group.
Remove	Delete the selected Shortcut or Shortcut Group. Note: As Shortcuts and Shortcut Groups are virtual indexes, moving, renaming or deleting them has no impact on the actual recorded files.

Calls for Review Panel Features & Functions

- The Calls for Review Panel is an organizational tool that can be used to hold links to recordings for later review.
- A Review Folder works in the same manner as Favorites or Bookmarks in your browser by storing and organizing links to play recordings.
- The Review functions can be accessed from the Calls for Review toolbar and right-click menu.
- You can create any number of folders in this area, name them as required and organize them into groups and subgroups.
- Recordings can easily be added to a Calls for Review folder using drag and drop from a Recordings List or using the Calls for Review Control in the Recordings List or Player Toolbar.
- Recordings can easily be removed from a folder using select or multi-select and Delete from the Toolbar, right-click menu or delete key.
- Removing or deleting the Calls for Review folder or the linked recordings has no impact on the recorded files.



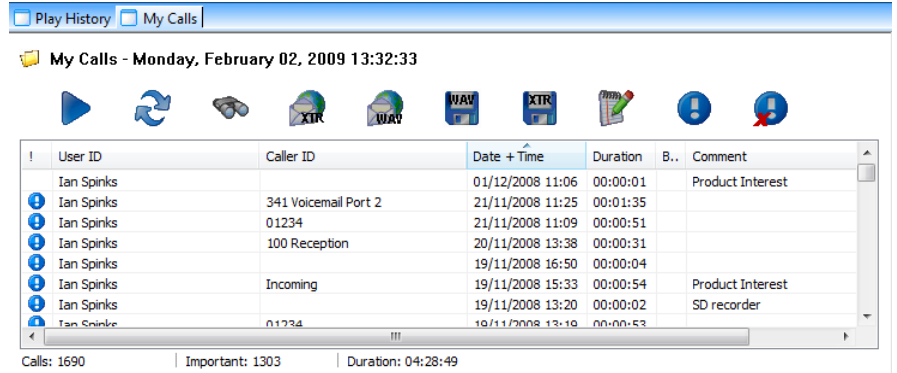
Calls for Review Panel Functions

Function	Description
Play	Load the selected recording into the Player and starts playback.
Select All	Select all recordings within a Hotlist.
Copy	Copy references to the selected recordings to the clipboard.
Paste	Append the selected recordings to the Recordings List.
Remove	Delete the selected Hotlist. Note: As Shortcuts and Shortcut Groups are virtual indexes, moving, renaming or deleting them has no impact on the actual recorded files.
New Hotlist	Create a new Hotlist.
Rename Hotlist	Enable renaming of the selected Hotlist.
Clear Hotlist	Delete all linked recordings within the selected Hotlist.
Remove Duplicates	Remove duplicate linked recordings a Hotlist.
Explore	Open Windows Explorer focused on the parent folder of the selected recording.

Recordings List Features

Recordings Lists form the core of XTR Reporter Pro.

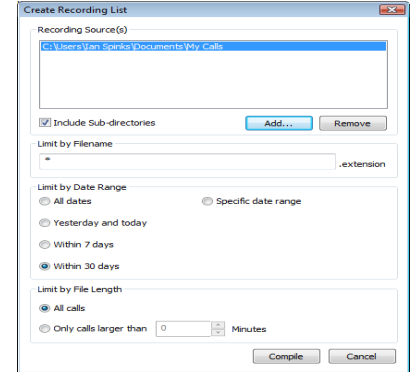
- They provide an interface to interact with recorded calls for tasks such as viewing, search & data-mining, editing, playing, emailing and managing.
- Recordings Lists are document windows which appear in the center of the Main Window.
- Detailed information about each recording is displayed in a tabular view with a reference to edit, playback and manage the recorded call.
- You can work with and toggle multiple Recording Lists simultaneously and customize by adding or removing calls.
- Recording Lists can also be saved and shared which provides a worksheet for analysis.



Function	Description
Header	The Recordings List Header appears at the top of the Recordings List. In the Header, an icon and name label identifies the source of the recordings displayed in the Recordings List. For example – If the Recordings List Header displays ‘My Calls’, the Recordings List was compiled using a Shortcut called ‘My Calls’. The Recordings List compilation date and time appears to the far right in the header.
Toolbar	The Recordings List Toolbar provides various controls to work with recordings and recording information.
Data Fields Column Header	Data Field Column Headers display the name and data field, can be used to sort the data in ascending or descending order.
Selected Recording and Data Fields	Data fields display captured and user defined recording information like User ID, Caller ID and Comments etc. Each recording appears on a row with recording information organized into data fields.
In-Place Editing	The Caller ID can be edited in place by selecting the field and clicking.
Summary Bar	The Summary Bar appears at the bottom of the Recordings List it provides summary statistical information about the recordings in the Recordings List. Information like the number of recordings, number of recordings marked as important and total duration of Recording List.
Context Menu	The Recordings List Context Menu provides a shortcut to common controls associated with Recordings Lists and is available by right-click inside the Recordings List.
Multi-Select	Recordings Lists support several functions which can be performed on multiple recordings simultaneously using multi-select. You can also use default windows keyboard functions like CTRL+A and SHIFT+ARROW KEYS. You can also use keyboard and mouse combinations like CTRL+MOUSE-CLICK and SHIFT+MOUSE-CLICK.
Drag and Drop	Recordings List drag and drop functions can be used to customize Recordings Lists. They can also be used to link or copy recordings from Recordings Lists. Drag and Drop is also available directly from Windows Explorer.
Window Controls	The Recordings Lists Windows can be minimized, maximized, restored and resized. The Windows Menu provides options to Cascade and Tile multiple Recordings Lists.

Create Recordings List Window Features & Functions

- The Create Recordings List Window appears when you attempt to create a Recordings List which requires the source to be scanned for recorded files.
- Call sources which are scanned are those from the Explorer Tree, a Shortcut or Shortcut Group.
- The Create Recordings List Window provides query options on the calls archive which can be used to compile a more targeted Recordings List.
- Query options are defaulted to retrieve all calls from last 30 days so you can simply click Compile or press Enter when the Create Recordings List Window appears.
- Query options are described in the Functions section.



Create Recordings List Window Functions

Function	Description
Paths List/Name list	This displays the path and resource to scan for recordings.
Include sub-directories	This option can be used to include or exclude scanning sub-directories for recordings.
Add	This option can be used to add additional recordings sources to include in the scan.
Remove	This option will remove the selected source.
All Dates	This option will ignore the recording created date filter.
Yesterday and Today	This option will apply a date filter which will retrieve only recordings created on the current date or one day prior.
Within 7 days	This option will apply a date filter which will retrieve only recordings created within 7 days of the current date.
Within 30 days	This option will apply a date filter which will retrieve only recordings created within 30 days of the current date.
After this Date	This option can be used to define the start of the date range ignoring recordings created prior to this date.
Before this Date	This option can be used to define the end of the date range ignoring recordings created after this date.
All Calls	This option will ignore the recording file length filter.
	This option can be used to define the minimum file length which will retrieve only recordings larger the specified length.
Compile	Begins Recordings List compilation for the defined attributed.
Cancel	Aborts Recordings List compilation.

Recordings List Toolbar Functions

Function	Description
Play	Start playback of the selected recording. Or Create a new Recordings List of the selected recordings and start playback when calls are multi-selected
Refresh	Update recording information for all recordings in the Recordings List.
Search	Launches the search Window to drilling down the Recording list by User ID, Caller ID, Comment or All via keyword.
Email Original Format	Launch default email application send email form and attach selected recordings in XTR format.
Email WAV Format	Launch default email application send email form and attach selected recordings in WAV format.
Convert to WAV	Launch the Convert Recordings Window to convert the file.
Convert to Original	Launch the Convert Recordings Window to select the format and convert the file.
Delete	Permanently delete the selected recordings.
Notes	Add annotation notes to the selected call.
Mark Important	Flag the selected recordings as Important.
Un-mark Important	Remove the Important Flag from the selected recordings.

Recordings List Right-Click Menu Functions

Function	Description
Play	Load the selected recording into the Player and start playback.
Copy	Copy references of the selected recordings.
Paste	Paste recording references from the clipboard.
Remove	Remove the selected recordings.
Trim	Remove the non-selected recordings.
Select All	Select all recordings.
Mark as Important	Flag the selected recordings as Important.
Un-mark Important	Remove the Important Flag from the selected recordings.
Delete Recording	Permanently delete the selected recordings.

Recordings List Data Fields Features

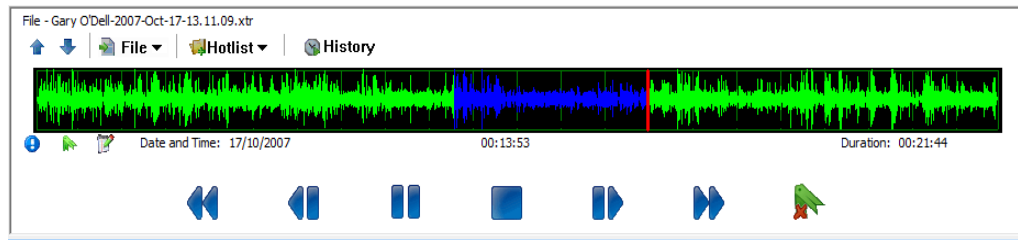
Function	Description
Exclamation Icon	If a recording displays an Exclamation Icon, the recording is flagged as Important.
Blank	If a recording does not display an Exclamation Icon, the recording is not flagged as Important.
User ID	The User ID field displays the ID of the person who created the recording.
Caller ID	The Caller ID field displays the number dialled, the inbound number captured or user defined information.
Date & Time	The Date & Time field displays the date and time the recording was created.
Duration	The Length field displays the length of the recording in hours, minutes and seconds (hh:mm:ss).
Bookmark	If a recording has a bookmark associated with then an Bookmark icon is displayed
Comment	The Comment field displays any user entered notes.

Recordings List Sorting and Filtering Functions

Function	Description
Important	Click the header to sort ascending or descending as indicated by the small arrow to the right of the header.
User ID	Click the header to sort ascending or descending as indicated by the small arrow to the right of the header.
Caller ID	Click the header to sort ascending or descending as indicated by the small arrow to the right of the header.
Date & Time	Click the header to sort ascending or descending as indicated by the small arrow to the right of the header.
Length	Click the header to sort ascending or descending as indicated by the small arrow to the right of the header.
Bookmark	Click the header to sort ascending or descending as indicated by the small arrow to the right of the header.
Comment	Click the header to sort ascending or descending as indicated by the small arrow to the right of the header.

Player Features

- The Player panel is a dynamic container which houses the Player.
- All XTR Reporter Pro Playback and audio controls are handled by the player.



Player Features

Function	Description
Header	When a recording is loaded into the Player, the file name appears to the far left. By default, the Player is docked and locked at the bottom of the Main Window. The Player Panel can also be undocked from its position to float freely about the screen using mouse drag or double-click in the Header. The Player can be re-docked to its position by drag & drop to its docking position or double-click in the header. The Player can be resized vertically with mouse drag from the top of the header.
Toolbar	The Player Toolbar provides access to file, and data in the Player.
Recording Information Fields	Recording information appears in columns at the top of the display area.
File Information Icons	The Important icon – If this call is mark as important the important will be displayed The Bookmark icon – If the call has a bookmark associated then the bookmark icon will be displayed. The Notes icon – If the call has any notes added then the notes icon will be displayed.
Playback Timer / Recording Length	The playback timer appears to the middle and displays the current playback position in the recording over the total length of the recording (hh:mm:ss / hh:mm:ss). The playback position in the recording is determined by the position of the Track bar. Recording length information displays the duration of the recording.
Basic Controls	These are the playback Play, Pause, Resume and Stop functions.

Player Toolbar Functions

Player Toolbar Functions

Function	Description
Mark Important	Flag the call as Important.
Unmark Important	Remove the Important Flag.
Email Original Format	Email the call as an attachment in the original file format.
Email WAV Format	Email the call as an attachment in WAV format.
Convert to WAV Format	Launch the Convert Recordings window to convert the call to WAV
Delete	Permanently delete the call.
Eject	Eject the call and release file locks so others call access the call.
Calls for Review	Display the Calls for Review Tree control to add the recording to a folder.
History	Display the current play History.

XTR Reporter Pro Utility Features

This section provides information about the following utility features of the application:

- Using Drag and Drop throughout the Application
- Using Keyboard Shortcuts

Drag & Drop Functions

Control	Actions	Result
Recordings List	Selected calls from a Recordings List into another Recordings List.	Copy the references of the selected recordings into Recordings List (excludes duplicates).
Windows Explorer	Selected calls from a Windows Explorer source into a Recordings List	Append selected recordings from Windows Explorer to the Recordings List.
Windows Explorer	A call from a Windows Explorer source into the Player.	Loads the selected recording into the Player (multiple calls not supported).

Keyboard Shortcuts

Control	Actions	Result
Main Window	CTRL + O	Launch a file dialog window to open a saved Recordings List.
Main Window	CTRL + N	Create a new blank Recordings List.
Main Window	CTRL + S	Launch a Save dialog window to save the Recordings List.
Recordings List	CTRL + C	Copy references of selected recordings in the Recordings List to the clipboard.
Recordings List	CTRL + V	Paste references to recordings from the clipboard into the Recordings List.
Recordings List	CTRL + P	Load the selected recording into the Player and start playback.
Recordings List	CTRL + A	Select all recordings in the Recordings List.
Recordings List	DELETE	Remove the selected recording from the Recordings List (the actual recording file is not deleted).
Player	CTRL + SPACEBAR	Pause and resume playback.
Shortcuts	DELETE	Deletes the selected Shortcut or Shortcut Group.
Calls for Review	DELETE	Deletes the selected link to recording (the actual recording file is not deleted).

Using XTR Reporter Pro

Step 1 – Create Your Shortcuts

How to Create a Shortcut from the Shortcuts Panel

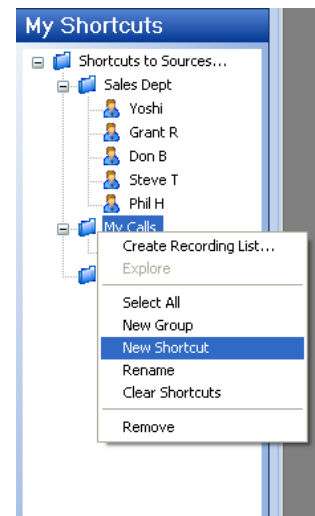
1. From the Shortcuts toolbar or right-click menu, click the New Shortcut option.
2. The Create Shortcut Window will appear.
3. Click the browse button and navigate and select the calls source to Shortcut.
4. Click OK to confirm and OK again to create the Shortcut or Cancel to abort.

How to Create Shortcuts from the Explorer Panel

1. Navigate and select the calls source in the Explorer Tree.
2. Click Add to Shortcuts from the Explorer toolbar or right-click menu.
3. The new Shortcut will now appear in the Shortcuts Tree root group.
4. The name of the call source is applied to the name of the new Shortcut by default.

How to Create Shortcut Groups

1. From the Shortcuts toolbar or right-click menu, click the New Shortcut Group option.
2. A new Shortcut Group will be created in the Shortcuts Tree root with the default name 'New Group'.
3. The Shortcut Group can be renamed from the Rename option in the Shortcuts toolbar or right-click menu.



How to Rename Shortcuts and Shortcut Groups

1. Select the Shortcut or Shortcut Group to rename.
2. Click the Rename option from the Shortcuts toolbar or right-click menu.
3. Type the new name of the Shortcut or Shortcut Group.
4. Press Enter to save.

How to Organize and Maintain Shortcuts

Shortcuts can be organized into Shortcut Groups or subgroups, removed, renamed, exported or imported as required.

How to Create Shortcut Groups

1. Click the New Shortcut Group option from the Shortcuts toolbar or right-click menu.
2. A new Shortcut Group will be created in the Shortcuts Tree root with the default name 'New Group'.

How to Move Shortcuts and Shortcut Groups into Sub-groups

1. Select and hold the mouse button down on the Shortcut or Shortcut Group to move.
2. Drag the item into the target Shortcut Group.
3. An arrow will appear to the left of the mouse cursor to indicate the drop position.

4. Release the mouse to move the item.

How to Rename Shortcuts and Shortcut Groups

1. Select the Shortcut or Shortcut Group to rename.
2. Click the Rename option from the Shortcuts toolbar or right-click menu.
3. Type the new name of the Shortcut or Shortcut Group, press Enter to save.

How to Remove Shortcuts or Shortcut Groups

1. Select the Shortcut or Shortcut Group to remove.
2. To multi-select, hold the shift key down and click on each item.
3. Click the Remove option from the Shortcuts toolbar, right-click menu or press Delete.

How to remove all Shortcuts from a Shortcut Group

1. Select the Shortcut Group to empty.
2. Click the Clear Shortcuts option from the right-click menu.

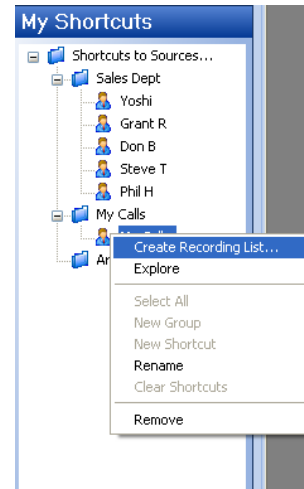
Step 2 – Create Your Recordings List

How to Create Recordings Lists from a Shortcut

1. Select the Shortcut in the Shortcuts tree.
2. Right-click menu, or double-click the shortcut to bring up the Create Recordings List window.
3. Click Compile to start or Cancel to abort.

How to Create Recordings Lists from Explorer

1. Navigate to the call source in the Explorer Tree.
2. Click the Create Recording List button from the Explorer toolbar or double-click the source to bring up the Create Recordings List window.
3. To apply pre-filters, click the Show Advanced Options button in the bottom left of the window and set query parameters.
4. Click Compile to start or Cancel to abort.



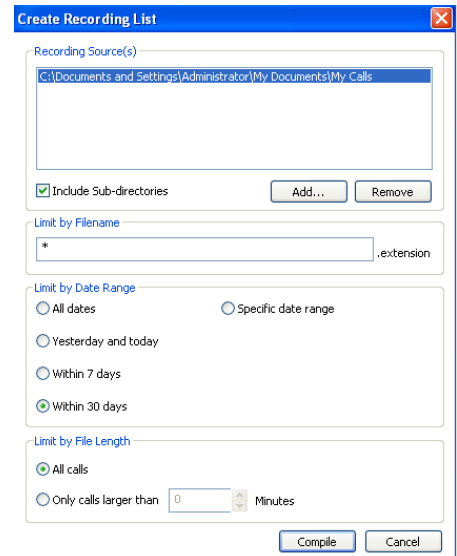
How to Apply Pre-Filters

Call Source Filters

1. The call sources set for this can appear in the call source list.
2. To add an additional call source to the query, click the Add button to launch a folder dialog.
3. Navigate to the source to add and click OK to confirm.
4. To remove a call source, select the source in the list and click Remove.
5. To apply the query and retrieve calls from folders contained in these call sources, check the include sub-directories option.
6. Click the Compile button to retrieve calls or Cancel to abort.

File Name Filters

1. In the Limit by Filename input box, enter the text which should be included in the file name.
2. Use an asterisk before the text to ignore/include any characters before a specific value.
3. Use an asterisk after the text to ignore/include any characters after the specific value.
4. When using the filter, DO NOT enter the file extension; it is already assumed to be at the end of the value.
5. Click the Compile button to retrieve calls or Cancel to abort.
6. File Name filters can be used to retrieve only calls by parameters on the file name.
7. File name filters can be used to file the XTR file format file naming convention includes the agent who created the call and the date/time the call was created.
 - This filter can be very effective when attempting to specific calls by those parameters.



- File Name filters use the asterisk character to represent a wild card which can be used several times within the input box. By default, the input box value is set to asterisk only which means ANY characters in the file name.

File Name Filtering Example 1: *Davidson

- Only files which contain 'Davidson' at the end of the file name are retrieved.
- These would be files like 'Tom Davidson.fileextension' or 'anythingDavidson.fileextension'.

File Name Filtering Example 2: *David*

- Only files which contain 'David' anywhere in the file name are retrieved.
- These would be files like 'Tom Davidson.fileextension', 'David Jones.fileextension' or 'Paul David.fileextension'.

How to Apply Date Range Filters

1. Select from pre-sets by clicking one of the available options; all dates, yesterday and today, Within 7 days, Within 30 Days or Specific date range.
2. To enter a specific date range, enter/select the start date from the after this date input box.
3. Enter or select the end date from the "Before" this date input box.
4. Click the Compile button to retrieve calls or Cancel to abort.

How to Apply File Length Filters.

1. Click the Only calls larger than option to enable the file length spin control.
2. Use the Increase and Decrease buttons or enter the minimum value in minutes.
3. Click the Compile button to retrieve calls or Cancel to abort.

How to Speed up Recordings List Compilation

How Compilation Works

Recordings List compilation is a three step background process requiring no user interaction when started. The steps are Indexing, Reading Call Information and Building a Recordings List.

Step 1: Indexing

- Indexing is a process which examines each specified call source and builds a list of calls to read which match the specified query parameters.
- During this process, the cursor changes to an hour-glass.
- The Task In Progress window will appear to show status as 'Scanning'.
- The Indexing process can be lengthy depending on volume of calls in the call sources.

Step 2: Reading Call Information

- Each call in the Index is opened, read to retrieve call information and then and closed.
- The Task in Progress window will display a progress bar, the number of files found and the number of files read during this process.
- Reading call information is typically the most time consuming process.

Step 3: Caching Recordings List

- Once all the calls are read, a new Recordings List window is created and populated with references to open each call and corresponding call information.
- Typically, the Building Recordings List process is fast and unnoticeable.

Organizing and Defining Call Sources

1. Organizing calls into multiple call sources, like department and/or agent, or time periods, provides flexibility, precision when querying and can significantly reduce the compilation time.
2. When defining a calls source, selecting the parent directory of the calls rather than the drive or the parent directory of the calls sources will also improve performance.

Assume you want to retrieve calls from a directory called "Archive Jan 2005" which is a sub-directory of "My Calls" stored on your C drive. The path to calls in this directory would be: C:\My Calls\Archive Jan 2005\. The following calls source definitions could be set:

1. Best definition for optimal speed: C:\My Calls\Archive Jan 2005\
2. Bad definition with slow performance: C:\My Calls\ (with Include sub-directories option checked).
3. Not recommended definition: C:\ (With Include sub-directories option checked).

Subdirectory Options

1. Avoid including subdirectories in your queries when unnecessary.
2. Un-check the include sub-directories option in the Create Recordings List window.

Pre-Filter Options

1. Wherever possible, use Pre-filters to limit the number of calls to read and retrieve.
2. Apply File Name Pre-filters, Date Range Pre-filters, File Length Pre-filters or all three where applicable.
3. This will dramatically decrease the time required to access the calls.

Nothing is happening when attempting to compile?

1. During the Indexing process, you may experience long periods of what appears to be inactivity.
2. Also, the Task in Progress window may appear idle with no progress bar, or updated message.
3. These delays are typically a result of the number of call sources to query volume of calls to index.
4. The speed at which these operations are processed is dependent on the system processor, memory capabilities, other applications running and the available network bandwidth.
5. The compilation process will display a message in the event of errors.

Step 3 – How to Play Calls

How to Play Calls

To playback a call, you will need to load it into the Player. The following are methods to load calls into the Player.

How to Play a Call in a Recordings List

1. Select the call in a Recordings List and click Play from Recordings List toolbar or right-click menu, or double-click the call.
2. The call will be passed to the Player and start to playback.

How to Play a Call in a Call for Review folder

1. Select the call in a Call for Review folder and click Play from toolbar or right-click menu, or double-click the call.
2. The call will be passed to the Player and start to playback.

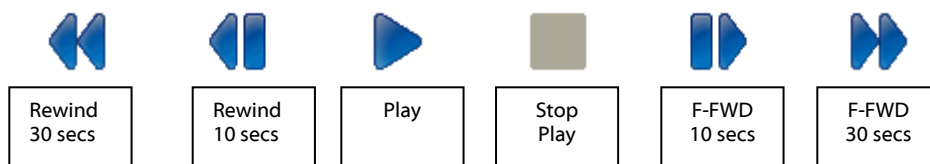
How to Play a Call from Windows Explorer

1. Select a call from Windows Explorer and drag into the Player.
2. The call will load into the Player.
3. Click Play to playback.

Playback Controls


How to Play, Pause, Resume and Stop Playback

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




1. Double-click on a call in a Recordings List will load the call into the Player and start playback automatically.
2. When a call is playing, the Play button toggles to a Pause button which will halt playback.
3. When a playback is paused, the Pause button toggles to a Resume button which will continue playback from the pause position.
4. The Stop button will stop playback, pause status and return the trackbar to the beginning of call.
5. The Play button will start playback from the position of the trackbar.

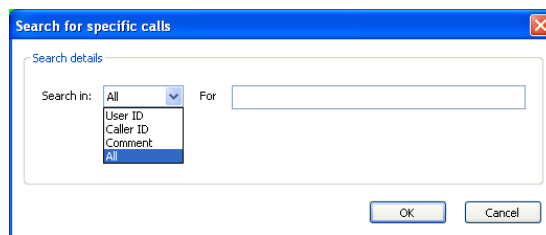
Other Controls

 **Calls - Wednesday, April 01, 2009 10:19:58**




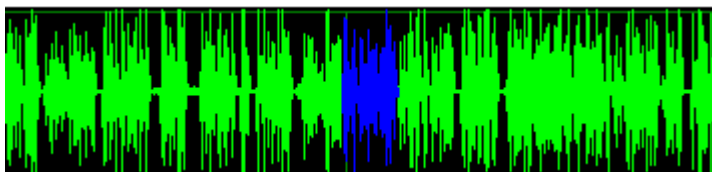
The **Refresh** option will perform a new scan of the folder in view.

Select  **Search** to enable searching for calls in view by User ID, Caller ID/Number Dialed-, 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.




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 area book-marked in blue as shown below:

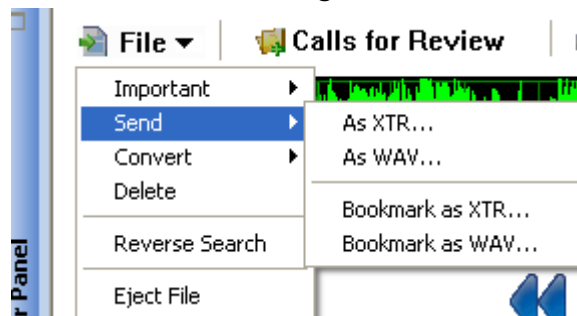


E-Mailing Recordings or Book-Marked Portions of Calls

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.

Or from the Player Select 'File' > Send – then choose to either email the conversation as a wav file or an xtr file, or if a bookmark exists, you can send only the 'bookmarked' portion of the recording.



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

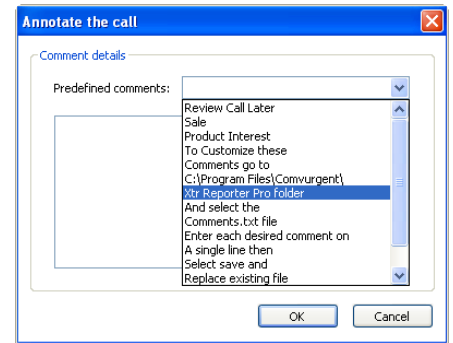
Adding Notes to a Recording

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



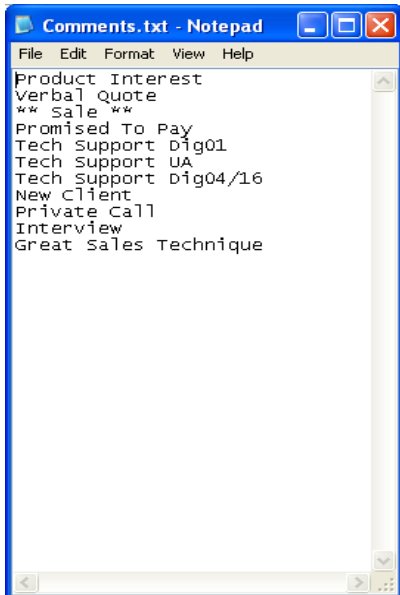
Notes can be typed in or selected from predefined notes programmed by the user.

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



Customize Pre-Defined Comments

Located in the Program directory, which is loaded in default to C:\Program Files\Comvurgent\XTR Reporter Pro, you will find a file called Comments.txt. To edit this file, click on the file 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.

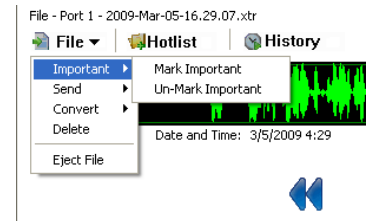
The new list will then appear in your drop-down menus.

This will place the selected text in the comments field; more text can be appended to the notes if desired.

Important Calls

Calls can be marked as **Important** by selecting the call and simply 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.

Many of these functions can also be accessed from the Player Panel as shown on the right:



How to Update Call Information in a Recordings List

1. When multiple Recordings Lists are open which contain the same call, changes made to call information in one Recordings List will not become visible in the other Recordings List until it is refreshed.
2. Click the Refresh button to the far left of the Recordings List toolbar.
3. The Recordings List will be re-scanned to omit moved or deleted calls and update call information.

How to Remove File Locks

1. The loaded into the Player is locked for exclusive playback and editing.
2. It will remain locked until it is ejected from the Player.
3. This may interfere with operations like email, copy or delete if the call in the Player is included in the operation; a message will inform you of the problem.
4. Click the Eject option from the File menu in the Player toolbar to eject the call from the Player and remove file lock.

How to Multi-Select Calls in Recordings Lists

The following are multi-selection options after the first call is selected:

- CTRL+A key or SHIFT+A key will select all calls.
- SHIFT+Mouse-Click will select all calls between the first selected call and the last selected call.
- CTRL+mouse-click will select/de-select specific calls.
- The Select All option from the right-click menu will select all calls.

How to Use Copy, Paste, Trim and Remove

1. Select the calls to remove or keep in a Recordings List.
2. Click the Remove option from the right-click menu to remove the selection.
3. Click the Trim option from the right-click menu to keep the selection and remove all other calls.

How to Copy Calls Between Recordings Lists

1. Select the calls to copy from a Recordings List.
2. Click the Copy option from right-click menu or CTRL+C from the Keyboard.
3. Create a new Recordings List or bring the target Recordings List to focus.
4. Press CTRL+V or the Paste option from the right-click menu if available.

How to Select an Open Recordings List and Bring to View

1. Click the Window Menu option from the Main Menu.
2. A list of open Recordings List will appear towards the bottom of the menu by title.
3. The Recordings List currently on focus will be checked in the Window menu.
4. Click on the Recordings List to bring to view.

How to View Multiple Open Recordings Lists Simultaneously

1. When a Recordings List window is Maximized, Minimize, Restore and Close window controls appear in the far right of the Main menu directly under the Main window controls.
2. These allow you to control each Recordings List like standard application windows.
3. Click the Restore control to float a Recordings List window and enable resizing.
4. Each Recordings List window can be controlled independently.

How to Tile Open Recordings Lists

1. Window titling options appear in the Window menu from the Main Menu.
2. Select from Cascade or Tile Horizontal options.
3. The selection will be applied to all open Recordings Lists.

How to Append Calls from a Shortcut to an Open Recordings List

1. Bring the target Recordings List to view and select the Shortcut from the Shortcuts tree to append to the recordings List.
2. Drag the selected Shortcut over the Recordings List and release the mouse button.
3. Calls in the call source referenced by the Shortcut will be added to the current Recordings List using the default Pre-filters.
4. A progress will be displayed to show the number of calls found and appended to the Recordings Lists.
5. Recordings Lists automatically ignore duplicate calls.

How to Append Calls from a Shortcut Group to an Open Recordings List

1. Bring the target Recordings List to view and select the Shortcut Group from the Shortcuts tree to append to the recordings List.
2. Drag the selected Shortcut Group over the Recordings List and release the mouse button.
3. Calls in the call sources referenced by all Shortcuts in the Shortcut Group will be added to the current Recordings List using the default Pre-filters.
4. A progress will be displayed to show the number of calls found and appended to the Recordings Lists.
5. Recordings Lists automatically ignore duplicate calls.

How to Append Calls from Explorer to an Open Recordings List

1. Bring the target Recordings List to view and select the call source from the Explorer tree to append to the Recordings List.
2. Drag the selected call source over the Recordings List and release the mouse button.
3. Calls in the call source will be added to the current Recordings List using the default Pre-filters.
4. A progress will be displayed to show the number of calls found and appended to the Recordings Lists.
5. Recordings Lists automatically ignore duplicate calls.

How to Copy Calls

How to Copy Calls to Other Directories Using the Explorer Tree

1. Navigate to the target directory in the Explorer Tree.
2. Select the calls in the Recordings List to copy to another call source.
3. Drag the calls to copy into the target directory in the Explorer Tree and release the mouse button.
4. A confirmation dialog will appear.
5. Click OK to copy the files or Cancel to abort.

Note- you can also right click on a selected recording and use copy function.

How to Save and Share Recordings Lists

How to Save Recordings Lists

1. Add or remove calls until the Recordings List contains only cal you wish to retrieve.
2. Enter CTRL+S or click the Save option from Main Menu > File.
3. Choose the save location and enter a descriptive name in the save dialog.
4. The file name will appear in the header of the Recordings List when opened.
5. Click Save to Save or Cancel to abort.

How to Open a Saved Recordings List

1. Enter CTRL+O or click the Open option from Main menu > File.
2. Navigate to and select the .RECLIST file to open.
3. Click Ok to Open or Cancel to abort.

About Sharing Recordings Lists

- Sharing Recordings Lists provides a highly effective and efficient method for collaboration, strategy meetings or training exercises.
- Sharing Recordings Lists is the same procedure as saving, opening and importing Recordings Lists.
- Saved Recordings Lists contain file path and file name references to the calls.
- To ensure call information accuracy, only file references are stored in a saved Recordings List.
- These references are used to access each calls, retrieve calls information and compile a Recordings List.
- In order to share a Recordings List, users will need to have a common path to calls.
- Typically calls stored on a server would provide common paths.

Assume calls stored on a computer in this directory (G:\calls folder\archives\)

Sharable

If this computer is a server or accessed across a network, in the saved Recordings List the file paths would point to \\computer name\calls folder\archives.

- In this case anyone one who can access that path can access the calls referenced by the Recordings List.

Not-Sharable

- If this computer is your computer, in the saved Recordings List the File paths would point to G:\calls folder\archives.
- In this case, when the user attempts to open this Recordings List, the application would look for these calls in his or her G drive.
- This of course would mean result in files not found.

Access Play History

How to Access and Use Play History from the Player

1. The Player Play History maintains a log of played calls since the application was opened, allowing you to toggle back and forth between calls quickly even with the origin Recordings List closed.
2. Click the Play History button in the Player toolbar.
3. Select the call to playback from the list and double-click to play.
4. To remove a call from this log or clear the entire list, right-click and make your selection.

Recordings List Play History

- The Play History Recordings List is an application file which maintains a log of all files which have been loaded into the Player and played.
- It maintains a list of up to 100 played recordings and remains persistent after the application is closed.
- The Play History file is maintained in the background.
- When Play History is requested, a Recordings List is compiled from the log.
- The Play History Recordings List by default will appear at start-up when the application loads.
- You can disable this feature from the Tools menu.
- To **enable or disable, check the toggle option from Main Menu > Tools > Show History on Start-up.**

Calls for Review

How to Create Calls for Review folders

1. Click the New Hotlist option from the panel toolbar or right-click menu.
2. The new Folder will appear with the name 'New Hotlist'.

How to Rename a Call for Review Folder

1. Select the Hotlist to rename from the Hotlists Tree.
2. Click the Rename option from the Hotlists toolbar or right-click menu.
3. Type the new name of the Folder, press Enter to save

How to Add Calls to a Call for Review Folder from a Recordings Lists using the Hotlists Control

1. Select the calls in the Recordings List to add to a Folder.
2. Click the Calls for Review button in the Recordings List toolbar.
3. The Folder tree will appear inside the Calls for Review Control.
4. Navigate to the Folder where the selected calls will be linked and double-click to add.
5. The added calls will appear in the Folder tree.

How to Add Calls to a Call for Review Folder from a Recordings Lists using Drag & Drop

1. Select the calls in the Recordings List to add to a Folder.
2. Drag the selected calls over the target Folder and release the mouse button.
3. The added calls will appear in the Folder tree.

How to Add Calls to a Call for Review Folder from a Recordings Lists using Copy/Paste

1. Select the calls in the Recordings List to add to a Folder.
2. Enter CTRL+C or click on the Copy option from the right-click menu.
3. Select the target Folder and enter CTRL+V or click the Paste option from the right-click menu.
4. The selected calls will be added to the target Folder.

How to Add a call in the Player to a Review Folder

1. Click the My Calls for Review button in the Player toolbar.
2. The Folder tree will appear.
3. Navigate to the Folder where the call in the Player will be linked and double-click to add.
4. The call will appear in the Folder tree.

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- Technical support and assistance when setting up your XTR Reporter Pro
- The latest software and firmware downloads for your XTR Reporter Pro including feature enhancements and bug fixes
- Advice about XTR Reporter Pro

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