Intelligent Recording

Call Assistant SD

Installation and Users Guide

Introduction

Congratulations on your purchase of the Intelligent Recording Call Assistant SD.

The Call Assistant SD is part of an exciting range of cost effective call recorders that are available from Intelligent Recording.

This reference guide will take you through the installation, setup and use of the Call Assistant SD and help you begin recording your calls.

Downloads and Support Information

All documentation, software and manuals are available for download from our website.

www.usbcallrecord.com

On the menu bar click on the Download link and scroll down the section for Call Assistant SD.

Caution!

The use of monitoring, recording or listening devices to eavesdrop, monitor, retrieve or record telephone conversations or other sound activities, whether nor not contemporaneous with transmission, may be illegal in certain circumstances under federal and/or state laws. Legal advice should be sought prior to implementing any practice that monitors or records any telephone conversation.

PC Compatibility

The Call Assistant SD desktop application software is compatible with Windows operating systems XP, 7, 8 and 10.

The software will work with a MAC computer when run in a windows shell.

Call Assistant SD – Product Overview
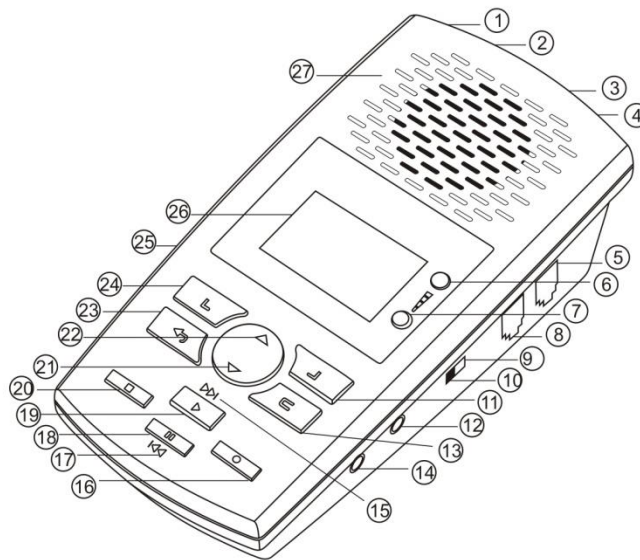
1- USB Port	15 -Fast Forward
2 - DV 5V	16 -Recording
3 - Line Port	17 - Fast Reverse
4 - Phone Port	18 - Pause
5 - Handset Line	19 - Play
6 - Volume +	20 - Stop
7 - Volume -	21 - Page Down
8 - Handset	22 - Page Up
9 – Source - Phone	23 - Back
10 – Source - Microphone	24 – Soft Key 1
11 – Soft Key 2	25 - SD Card
12 - Microphone	26 - LCD Display
13 - Delete	27 - Speaker
14 - Earphone	

Check The Package Contents

- 1 x Call Assistant SD Recorder device
- 1 x USB Power supply unit W/USB Power Cable (Round Barrel Connector)
- 3 x AAA batteries
- 1 x Line cord plus 1 x handset cord
- 1 x Quick Reference Install Guide
- 1 x SD Card.
- 1 x USB PC Cable (Standard USB to Mini USB – Do not use for Power)

Quick Setup Instructions

1. Remove the Call Assistant SD, power supply, line leads and batteries from the packaging.
2. Insert the SD Card provided into the recorder.
3. Insert batteries into the battery compartment on the underside of the recorder. Batteries are only intended for temporary backup – you must connect to AC power for use.
4. Insert power connector into the back of the unit and plug into the provided USB power supply. NOTE: Only Use the provided USB power supply for power.
5. **Use the USB to Round Barrel Connector for Power.**

Set the Call Assistant SD Date and Time

- Press Soft Key 2 <Setting>
- Use Down Arrow to select <System> - Soft Key 1 <OK>
- Press Soft Key 2 <OK> to Select <Time>
- Use the Up and Down arrows to change the hours – then Press <Next> to advance to minutes. Use the Up and Down arrows to change the minutes. Press <Set> when finished.
- Use Down Arrow to select <Date> and then press Soft Key to <OK>
- Use the arrows and <Next> to change the month, day and year. When done, Press <Set>
- You can use the Down Arrow to select/modify the Time and Date format.

Choose How To Connect

The Call Assistant SD can connect to your telephone in 2 ways:

- **Line Mode:** Where the Call Assistant SD is connected directly to an analog telephone line.

- **Handset Mode:** Where the Call Assistant SD is connected to the curly cord (telephone handset cord) of your telephone. This connection is used to record digital, IP, or Multi-Line telephones.

If you have a standard analog telephone that connects to a home phone line, or an analog extension behind a PBX (this includes desktop and cordless phones), you should use the Line Mode Connection method.

Line Mode Connection
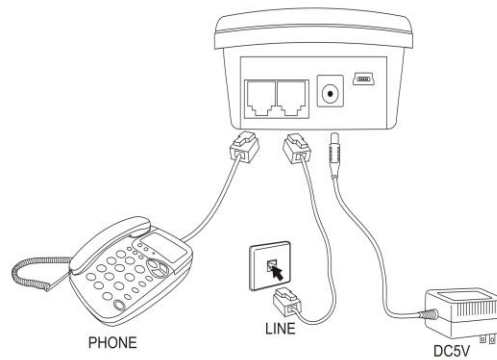
PHONE LINE DC5V

Disconnect the telephone line cord from the base of your telephone (the other end connects to wall socket) and plug this into the Call Assistant SD. Connect the long cord supplied between the Call Assistant SD and the socket on your phone (where you removed the line cord). NOTE: The Call Assistant SD will record calls when connected to the phone line, it is not required that the telephone be connected to the device.

Handset Mode Connection

Handset mode connection is used when you cannot connect to the analog telephone line directly. Examples of when you need to use handset mode are on Digital PBX telephones, IP telephones and Multi-Line telephones.

AR100 PHONE
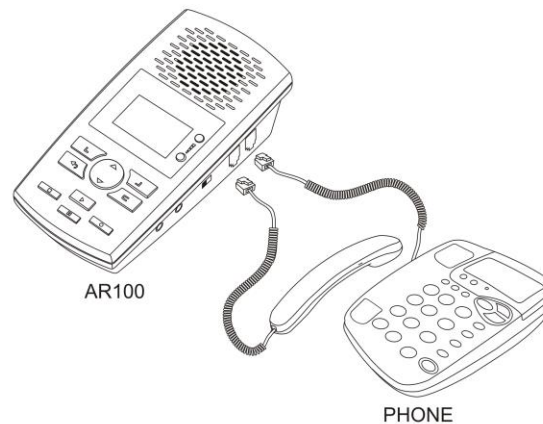
To connect in handset mode, remove the curly cord from your telephone base and connect into the Call Assistant SD and connect the short handset lead supplied between the telephone handset socket and the Call Assistant SD as shown above.

Important – Settings for Handset Mode

You will need to select the correct TRIGGER MODE to ensure handset mode operation is set. To select the correct mode:

- Press Soft Key 2 <Settings>
- Press Soft Key 1 to select <Recording>
- Press Down Arrow Key to select <Auto/Manual Rec> and then press <OK>
- Use Down Arrow Key to select <Trig> and press <OK>
- Press the <Back> key until you return to the main recording screen.

Adjustments for Optimum Handset Mode Operation

You may need to adjust the following parameters found under the Recording menu for optimum operation.

Before making these adjustments test the default settings to verify functionality.

Vox Trig Level – This is the threshold to detect audio when the handset is lifted to start recording. If this is too sensitive, recording may start when background noise is present and the phone is not in use. If not sensitive enough then it will not reliably start recording when the phone is in use. Settings are 1 to 10 with 1 being the most sensitive and 10 the least sensitive. Default setting is 3.

Vox Silence – This is the time that the Call Assistant SD hears silence on the call to determine that the call has ended and stops recording. If too short, your recordings may be broken into several smaller recordings. If too long, it may merge one recording into another to produce one recording from two calls. Default setting is 5 seconds.

Note on Handset Mode Recording – When using Handset Mode, the recorder uses sound levels on the handset to determine if the call is active. If you finish one call and quickly make another in a shorter time that the Vox Silence setting, it is possible that both calls will merge into one recording. If there is a period of silence during a call longer than the Vox Silence setting the recorder may determine that the call has ended and the call will be broken into separate recordings. Handset mode is not 100% reliable in determining the start and stop of calls but it is the only way to connect to some telephones.

Make A Test Recording

Once the device is connected and any settings changes have been made, lift the telephone handset and dial a number. You will see the LCD indicate a recording has started (handset icon in the top center of the LCD). If you are connected in Line Mode you will see the digits you dialed on the LCD and the Caller ID for inbound calls. If you are using in Handset mode the dialed digits and Caller ID are not available.

LCD Information

The Call Assistant SD screens provide an interface to the recording status and programming. An example of the screen in idle mode is below. Appendix A has a complete list of screens.

(A)Standby Mode

▯▮ : Remaining Battery capacity

◯◯ : Recording display (Flashes when recording)

☎ : Handset recording mode   🎤 : Microphone recording mode

Auto : Auto recording mode   Manual : Manual recording mode

Trig : Voice Trigger mode   ◯ : Loop recording mode

Time : System Time

(B)Talk Mode

Type : Incoming .Outgoing

Elapse : Talking time °

Phone number : Incoming/Outgoing phone number

Playing Calls on the Call Assistant SD

To play calls on the speaker of the Call Assistant SD:

- Press Soft Key One <LOOG>

- Use the Up and Down arrow keys to select the recording to play

- Press the Play button on the Call Assistant SD

A complete list of menu options can be found in Appendix A

Manual Mode Recording

The Call Assistant SD is defaulted to automatically record all calls when used in both Line Mode and Handset Mode. To change the record mode to Manual recording:

- Press Soft Key Two <Setting>

- Press Soft Key One <OK> to select Recording

- Use the Down Arrow key to select Auto/Manual Rec and Press <OK>

- Use the Arrow Keys to select Manual and press <OK>

The device will now operate in manual mode for line and handset connections. To begin recording press the Record key on the device. To stop recording press the Stop key.

Room/Memo Recording

The Call Assistant SD can be used to record memo dictation or room recording using the built in microphone. To use this feature:

- Move the slide selector switch on the side of the Call Assistant SD to the MIC position

- Press the Record button

- To stop recording, press the Stop key

- To record from the telephone – move the selector back to the Phone position

- The recording can be played on the Call Assistant SD or by using the desktop software.

XTR Desktop Software

Call Assistant SD – PC Software

To download the Call Assistant SD desktop software go to:

www.usbcallrecord.com

From the menu bar select Download and scroll down to the section for Call Assistant SD. Click on the software link to download the software to your PC and install.

To use the software once installed:

Connect your Call Assistant SD to your pc using the USB cable provided (Note: the device will not record when connected to your pc).

OR

- Power off the SD recorder by unplugging the AC power source and removing the batteries

- Remove the SD card from the player and insert the SD card into your PC.

Then:

Launch the XTR Call Assistant SD by double clicking on the icon that was created on your desktop.
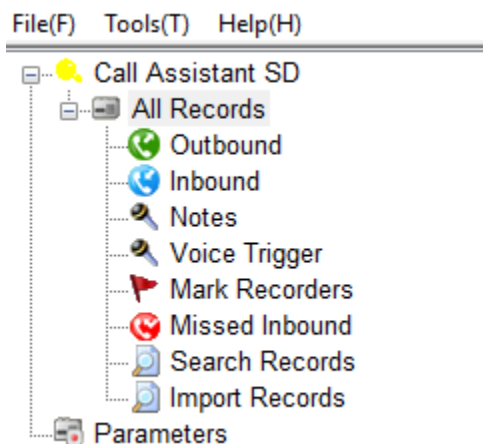
When you start the application it will find either the Call Assistant SD or the SD card on your PC and will provide a listing of all of the calls on the device/SD card.

Software Overview
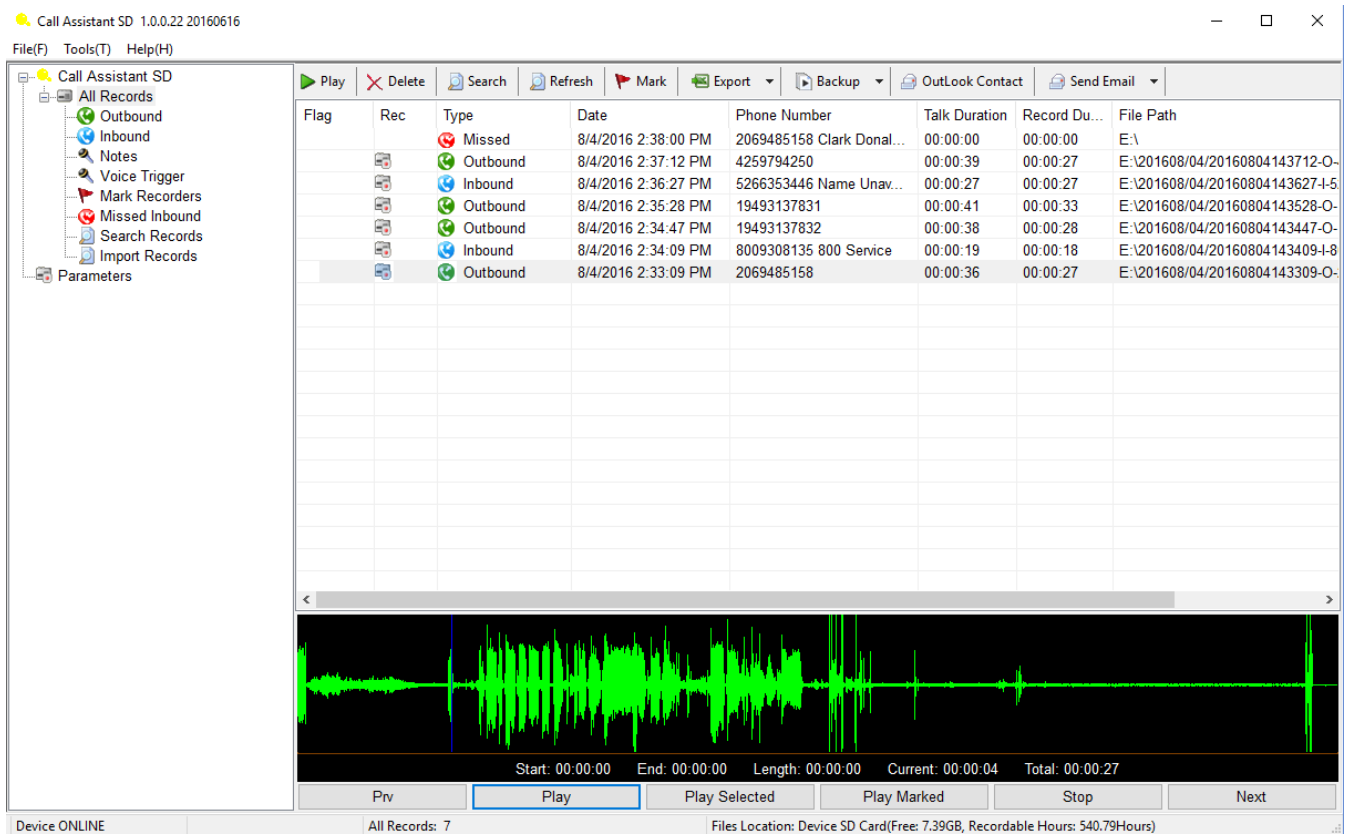
The application consists of three panels, the Access Panel on the left side, Calls Panel and the Player Panel.

Access Panel:

On the Menu Bar

File(F): Provides an option to exit the program

Tools(T):

Synchronization Device Record – Will rescan the device and refresh the call records

Fix Device Database – If the database becomes corrupted this option will attempt to repair the database

View Records of Device SD Card – The default setting, shows calls on the Device/SD card

View Record of PC Backup – Will show the call files backed up to your PC

Auto Backup Records of Device SD Card – When set this will automatically backup the call files to your pc when the device/sd card is connected

Set Backup Path – Set the desired location of the backup

Help(H): About, provides Contact and version information

Access Panel

Call Assistant SD – Will open a window allowing you to browse the Intelligent Recording website

All Records – Will show all records on the SD card

Outbound – Shows outbound calls only

Inbound – Shows inbound calls only

Notes – Will show memo/room recordings only

Voice Trigger – Will show Voice Trigger calls only

Mark Recorders – Will show any calls Marked/Flagged only

Missed Inbound – Will show Missed Calls only

Search Records – Will show the results of your search

Import Records – Allows you to import other call files if required

Calls Panel

The Calls Panel shows a listing of all call files on the connected device/SD card. Features include:

Play – To play a call click on the call in the Call Panel and click the Play icon

Delete – Click on a call and click Delete to delete a call. You can select and delete multiple call files at once by holding down the Shift key on your keyboard to select a range or holding down the Alt key on your keyboard to individually select files.

Search – Define your search by select Date, Phone Number and Type of Call

Refresh – Will rescan the device and refresh the display of calls

Mark – Flags a call for easier reference

Export:

> Export Excel – Select the range of calls and export the list view to Excel
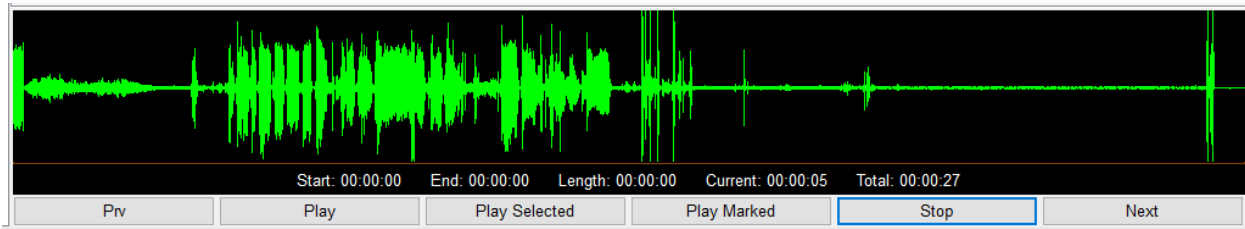> Export Voice File – Export the selected call(s) to a specified location

Backup – Backup a call or range of calls to the location set under Tools

Outlook Contact

Send Email – If you use an installed email client on your PC this will allow you to automatically attach the call file in .wav format to an email.

Player Panel

To load a call file into the Player Panel double click on the file in the Call Panel.

Prv – Will play the previous call on the Calls Panel

Play – Plays the call file.

Play Selected – Select an area of the recording by dragging holding down the left mouse button and dragging across the call panel. You can then play just that part of the call with this feature.

Play Marked – Will play a Marked/Flagged file

Stop – Stops play of the call

Next – Will play the next call on the Calls Panel

Appendix A

LCD Screen Menu Reference

Record Parameters

RECORDING
MIC REC. MODE
AUTO/MANUAL REC.
MANU REC. MODE
VOX TRIG LEVEL
VOX SILENCE
MAX REC. DURATION
MIN REC. DURATION
LOOP REC.
LOW MEMORY REMINDER
PLAY ANNOUNCEMENT
OFF HOOK VOLTAGE
CALL OUT DELAY TIME

Mic Rec Mode:

The selector switch on the side of the device must be in the MIC position for these setting to take affect.

> Manual – Press Record to start, Stop to end.
> VOX – Automatic mode, will start recording on audio input

Auto/Manual Rec

Used to set channel recording conditions:

> Manual – Press Record to start, Stop to end*) If you are using the device in Manual mode you must adjust the setting in Manu Rec Mode for recording setup type.*

> Auto – Used in line mode, will start recording when the line is use

> Trig – Use this setting to record in Handset Mode

Manu Rec Mode

When recorder is set to Manual this is used to set recording condition

> Handset Mode – select if you are using in handset mode

> Line Mode – select if you are using in line mode.

Vox Trig Level

> Adjust the audio trigger level when using in handset mode. Setting range is 1-10 with 1 being the most sensitive.

Vox Silence

Adjust the silent time to stop recording when using in handset mode. Default is 5 seconds.

Max Rec Duration

Set the maximum recording duration for a call. Calls that are longer than the setting will be recorded in as a separate call file. Default is 2 hours, you can set to Never for no maximum duration.

Min Rec Duration

Set the minimum duration for a call. Calls less than the minimum time will not be recorded. Default is 5 seconds.

Loop Rec

When enabled this will overwrite older call files when the SD card is full. If this is disabled the device will not record when the SD card is full.

Low Memory Reminder

If Loop Recording is disabled this setting alert you when the card is getting full. The memory indicator in the upper right of the LCD will flash. Settings are from 5 to 99 hours.

Play Announcement

Enable/Disable the option to play a recorded message when an incoming call is answered.

Off Hook Voltage

The system will record the call automatically when the line voltage is lower than the setting. The range is 15 to 30 volts. You can also test the voltage of the line to determine the correct setting from this screen.

Call Out Delay Time

The system will record calls after setting for delay time. Range is 0 to 20 seconds.

System Parameters

SYSTEM
TIME
DATE
TIME FORMAT
DATE FORMAT
TIME SYNC. WITH CID
LANGUAGE
LCD CONTRAST
SD RESERVED SPACE
FORMAT SD CARD
DEFAULT SETTING
VERSION

Time

System time setup

Date

System date setup

Time Format

Set for 12 or 24 hour format

Date Format

System date display format

Time Sync. With CID

Synchronize the time with the time stamp from Caller ID

Language

You can choose from Traditional Chinese, Simple Chinese, English or Spanish

LCD Contrast

Adjust the contrast of the LCD screen

SD Reserved Space

Set the reserve space for use with loop recording for overwriting older call files.

Format SD Card

Will format the SD card and erase all call files

Default Setting

Restore to factory default

<u>Version</u>

Will show the hardware and software version. SSID is the device serial number.

Log Screen

```
┌─────────────────────────┐
│ ▶T 04/01 12:48 00m11s   │
│ ⊙⊙ TRIG              ▶   │
│  T 04/01 11:48 00m12s   │
│ ⊙⊙ TRIG                 │
│  O 04/01 10:48 00m13s   │
│ ⊙⊙ 0932567814           │
│ OPT     1/3      TYPE    │
└─────────────────────────┘
```

From the log screen you can listen to and play the call files. Use the arrow keys to select the recording file, use the control buttons on the device to play, pause or stop the recording.

<u>Record Type</u>

I – Incoming   O – Outgoing   N – Mic   T – Voice Trigger

<u>Date</u>

<u>Time</u>

<u>Duration</u>

⊙⊙

Indicates there is an audio file, otherwise it is CDR info only

<u>Number Display</u>

Indicates the incoming caller id or outbound digits dialed

OPT Screen

OPTIONS
PLAY
FLAG
REMOVE FLAG
DELETE
SEARCH BY TIME
SEARCH BY TEL NO

Play

      Play the recorded call file

Flag

      Flag as important for easy search

Remove Flag

      Remove the flag

Delete

- Delete Audio Files and Keep the CDR. This will delete the audio file but keep a record of the call

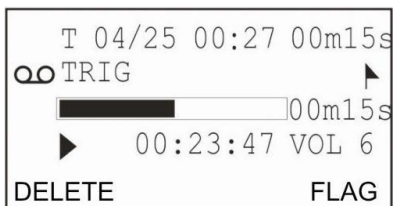- Delete Both Audio Files and CDR. Will delete both audio and CDR record

Search By Time

      Search for a call by time

Search by Tel No

      Search for a call by telephone number

Play Screen

```
 T 04/25 00:27 00m15s
OO TRIG              ▶
   ▄▄▄▄▄▄▄▄▄    00m15s
 ▶    00:23:47 VOL 6
DELETE            FLAG
```

Recording type, date, time, length, number and process are shown. You can delete or flag a call from this screen.

Type Screen

Use the screen to filter the types of call records you want to view. Options are:

DATA TYPE
ALL
INCOMING
ANSWERED
UNANSWERED
OUTGOING
NOTE
FLAG
TRIG
ANSWERING