



# Back Office Recorder 3.0 Installation Guide



## Intelligent Recording Limited

Downloads Available at [www.usbcallrecord.com](http://www.usbcallrecord.com)

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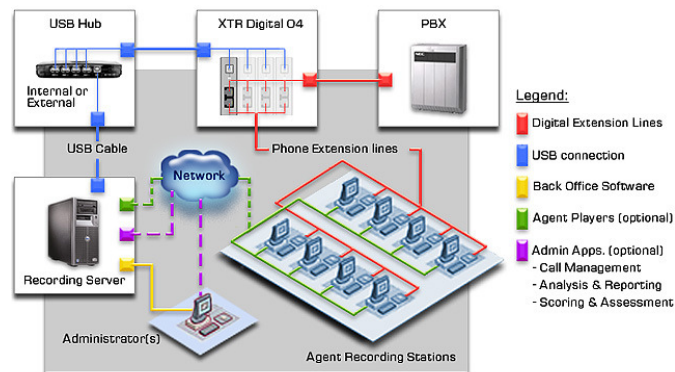
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## Welcome!

This guide describes the installation procedures for the Comvurgent BackOffice 3.0 software when used with the Xtension Recorder family of Recording Hardware as a centralized Call Recording and storage solution.

The complete Xtension Recorder BackOffice solution consists of:

- Your Recorder USB device that taps across the digital extension pair of a proprietary PBX telephone, or an Analog Line or signal.
- A PC for interfacing the recording devices.
- BackOffice Recording software.
- XTR Call Manager Player or XTR Reporter Pro.



**Version 3.0 + Software Enhancements** provide many added Benefits:

**Application Runs as a Service-** PC does not need to be logged into, once configured and started, application runs when the PC starts, no need for local log-in.

**Improved User Interface** – much simpler to configure and view ports.

**Naming of Ports/Channels** – Installer can now name the port to match the device rather than being tied to difficult to find serial numbers ( ie Dig04 – unit 1 , Port 1 rather than a serial number)

**Support of Single Port Analog01 Device ( UA 3.0)**

## Hardware

The following section outlines the hardware options that can be used with the BackOffice 3 Software.

BackOffice Software can be used with the any of the following hardware-types. This hardware can also be mixed and matched on the same host PC in order to meet exact recording requirements:

- Dig16
- Dig04
- Analog 04
- Analog 08
- Universal Adapter 3.0

Locate the Hardware Description you are installing on the next few pages and follow those instructions. The software installation is described in detail later in this document and is the same for all of the hardware devices.

## XTR Dig16 USB Device



The Xtension Recorder Dig16 hardware connects via a T-Connect Tap of each digital pair directly from the PBX. The Dig16 requires external power. Up to 3 Dig16 devices can be connected to a single PC (providing 48 ports). If more devices are required additional PCs can be utilized.

### Digital 16 Connections

The Dig16 consists of 4 groups of 4 RJ11 connectors with associated LED lights (NOTE: these LEDs DO NOT indicate recording status but are used to show device status)

- One PC USB connector, from which the device streams all speech and control channel information up to the host PC and the Xtension Recorder BackOffice application.
- Sixteen RJ 11 Digital Phone line connectors that passively ‘tap’ across the PBX/Keyset digital connection and ‘listen’ in high impedance mode to the signaling on the line. Xtension Recorder does not affect in any way the telephone operation with or without connection of the host PC.
- External Power Connection and Power Supply.

## Xtension Recorder Dig04 USB Device

The Dig04 Recorder hardware connects via a T-Connect Tap of each digital pair directly from the PBX. It derives power from the USB connection with the host PC.



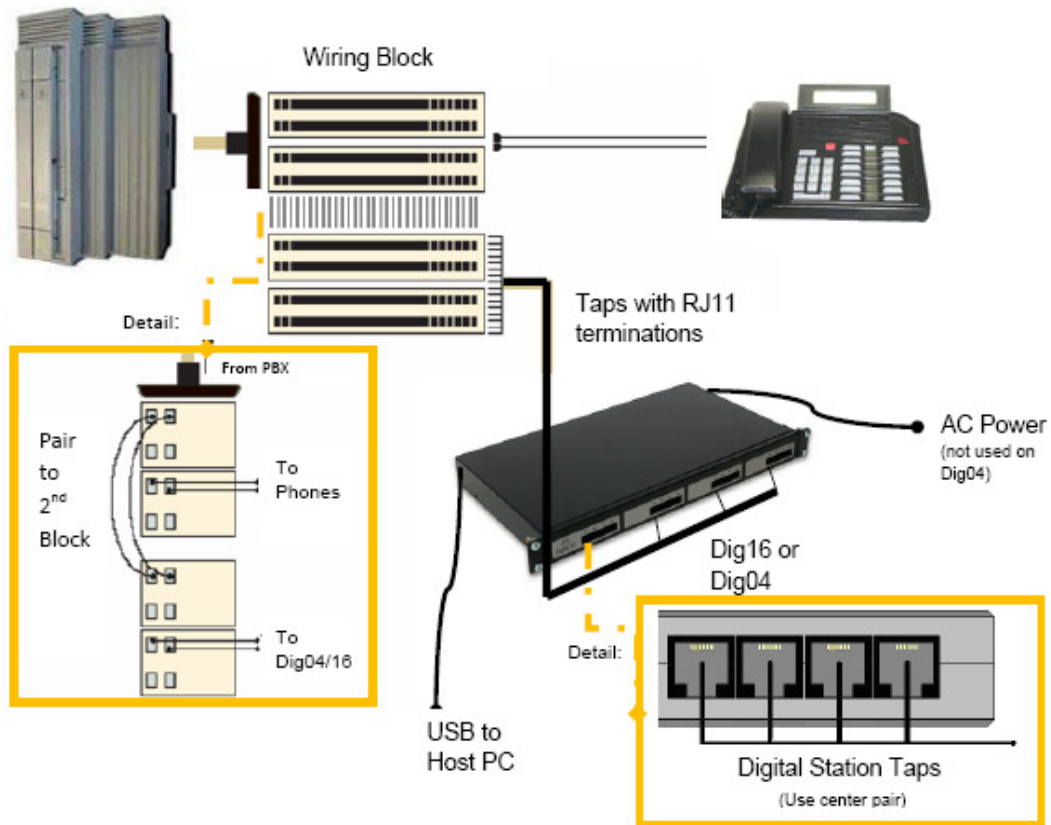
Up to 3 Dig04 devices can be connected to a single PC (providing 12 ports). If more ports are required, you can utilize the Dig16 devices as well as use the Dig04 to extend the number of ports on a system using a Dig16 (i.e. 20 ports = (1)Dig16 + (1) Dig04).

### Connections

The Dig04 USB recording device has 5 connectors and 4 LED indicators (NOTE: these LEDs DO NOT indicate recording status but are used to show device status)

- One PC USB connector, from which the device derives its power and streams all speech and control channel information up to the host PC and the Xtension Recorder BackOffice application.
- Four Digital Phone line connectors that passively 'tap' across the PBX/Keypad digital connection and 'listen' in high impedance mode to the signaling on the line. Xtension Recorder does not affect in any way the telephone operation with or without connection of the host PC.

## Digital 04/16 Station Wiring Example



The Dig04/16 records directly off the Digital Station Pair of compatible PBX/Key systems using a parallel tap of the same pair that powers the Digital Phone. The above Diagram illustrates one way to accomplish the parallel tap required, although there are many ways to get to the same end.

**Please note, regardless of which pair powers the Digital Station (i.e. as with Inter-Tel and Panasonic) the connection or tap into the Dig04/16 needs to be on the inside pair of the RJ11 connector.**

## ***Performance***

These devices do not interfere with the communication between the PBX and the Digital telephone. The device does not require USB power or a connection to the PC to maintain the functionality of the telephone in its normal manner.

The device meets the appropriate FCC and UL requirements required for this type of communications device.

## ***Firmware***

The device is 'soft up-loadable', its firmware and FPGA low-level protocol decryption is uploaded from the PC driver and Xtension Recorder application at runtime. This allows easy upgrade and enhancement of the product in the field as required.

# XTR Analog Recording Solutions



## Analog 04 & Analog 08



The Analog 04 and Analog 08 Recorder hardware connects via a T-Connect Tap of an Analog Line or Signal. It derives power from the USB connection with the host PC.

Up to 3 Analog Recording Devices can be connected to a single PC (providing 24 ports). If more ports are required, you can add additional host PCs.

### Front Panel

There are several LEDs on the front Panel of the Recorders.

**Power LED:** Indicates operational and communication status.

- Steady ON: Power is OK, USB Communication is Good.
- Slow Flashing: Power is OK, NO USB Communication
- OFF : No Power or Faulty Device.

**1-8 LEDs :** Indicate Line Status, turn ON when line is Active.

## **Rear Panel**

There are USB and Line Connectors on the Rear Panel.

**USB Connector** : This connection is used to connect the Recorder to the Host PC.

**Line Inputs**: Line connections are done using the connector labeled “1..4” and “5..8”. One end of the original should connect to the line connector and the other to the telephone lines using the color codes provided:

**Line 1/Line 5 = Blue Group**

**Line 2/Line 6 = Orange Group**

**Line 3/Line 7 = Brown Group**

**Line 4/Line 8 = Green Group**

## **Computer Connection**

***The Analog 04/08 Recorder should connect to the computer using the provided cable. The Recorder should be connected directly to the computer (without a hub). If more USB ports are needed, use internal PCI –USB controller cards to expand the number of USB ports on the PC.***

## HOST PC Requirements

The specs below are minimum specifications for use with any of the XTR Hardware solutions used in a BackOffice Recording environment when utilizing the BackOffice 3.0 Software:

- A P4 2.5 GHz PC equipped with:
  - 1 GB RAM.
  - Windows XP, Vista or Win 7 (32 or 64 bit)
  - 1 USB port for each device
  - An available PCI slot for each USB controller card if needed.
- LAN connection for remote access to stored calls.
- Internet Connection – Required for Remote Support and Updates
- Back Office Recorder Software.

### **Storage**

You can store the calls on the same host PC or on a separate network drive.

Using the GSM 6.10 Compression option, each 1Gb of Hard disk storage will allow you to record approximately 168 hours of calls.

## Installation

**DO NOT install the XTR BackOffice software until instructed!**

It is critical that you follow the steps in the installation procedure in the order listed below. Failure to do so will result in an unsuccessful installation.

### **STEP 1: Prepare the Location**

It is important that the wiring for the extensions is within 6 feet of the PC location. For this reason, it is recommended that the PC for the BackOffice location be located near the PBX MDF for extension wiring.

The installer will need to prepare the wiring to tap off the digital pair as shown in previous diagram for the Digital Recorders or off the Analog line or Signal if using the Analog Recorders.

### **STEP 2: Set Up the PC**

1. Set up the PC with the appropriate number of USB controller cards for the number of XTR devices. Follow the installation instructions for the USB controller card carefully. It is recommended that the PC be connected to the LAN for supervisor access to the stored calls as well as to facilitate Windows and Software updates as needed. Additionally, it may be desirable to load *PC Anywhere* on the PC for remote administration of the application.
2. Once the USB cards are installed, go to [www.windowsupdate.com](http://www.windowsupdate.com). Download and install any updated device drivers that may be available for your operating system and your USB controller cards. **This is a very important step Vista will need the latest updates to support the device drivers.**
3. When all the USB Controller Cards are installed and the PC updated, RESTART the PC.
4. Connect any USB hubs if applicable.
5. Make sure there are no 'Power Setting' options selected that will cause the PC to hibernate or hard drives to turn off.
6. We recommend that auto updates be turned OFF or set to notify.

## STEP 3: Install Xtension Recorder Devices

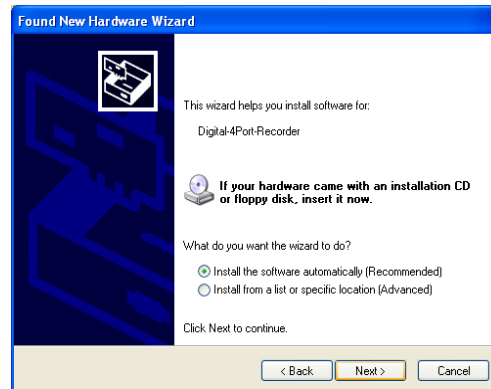
### Load Device Drivers

1. Make CERTAIN you are logged into PC with Administrative Rights, then Connect USB cable from XTR Recorder to PC
2. If Windows responds with 'Found New Hardware Wizard' then continue, if not skip to end of this section.

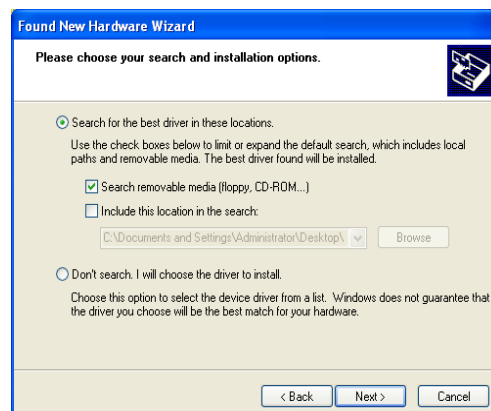
3. Select 'No'



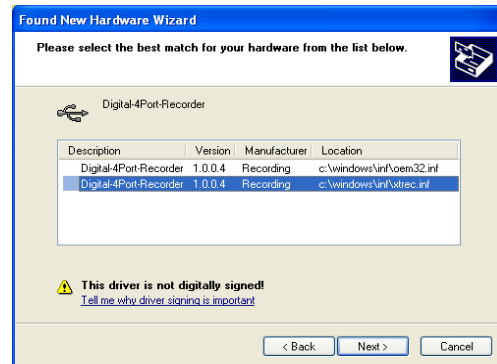
4. With CD in Drive, should load Automatically



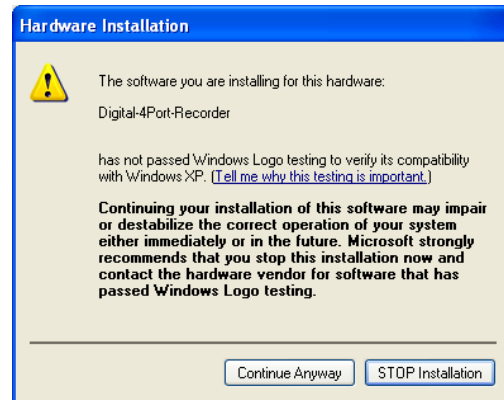
If not, Select Specific Location and search CD



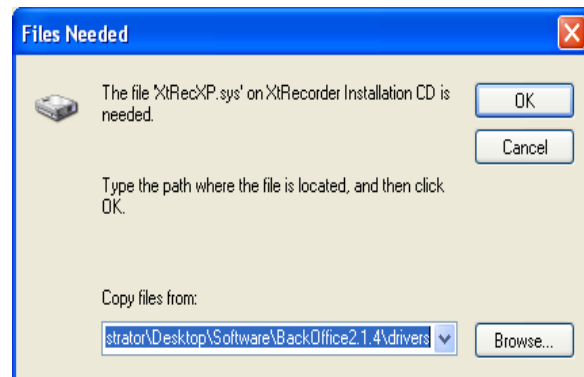
5. Select xtrec.inf file ,DO NOT select OEM Driver



6. Continue Anyway



7. Load sys file from same location on CD

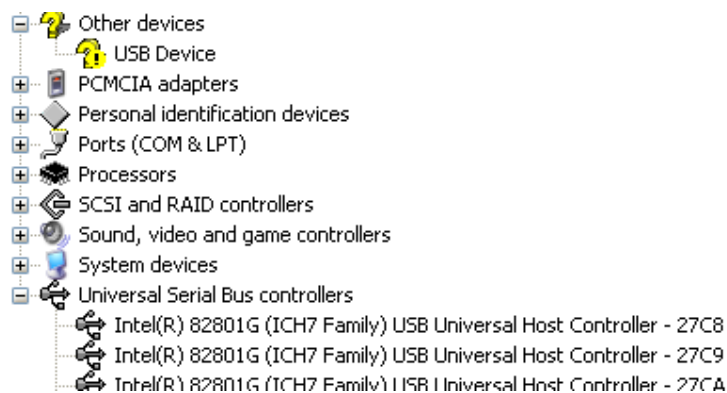


If installing the Dig16, *Windows will load a driver for each 4 port bank of ports separately, so this process will be repeated 4 times for each Dig16 installed.*

## If 'Found New Hardware Wizard' does not Launch

Open [Device Manager](#) (Control Panel >System>Hardware>Device Manager)

Locate 'Unknown Device' – Right-Click on it- the unknown device will either be under the Universal Serial Bus controllers or under 'Other device' as shown below:



## Select Update Driver

This will launch 'New Hardware Wizard' – follows Steps 3-6 above

## Check Devices in Device Manager

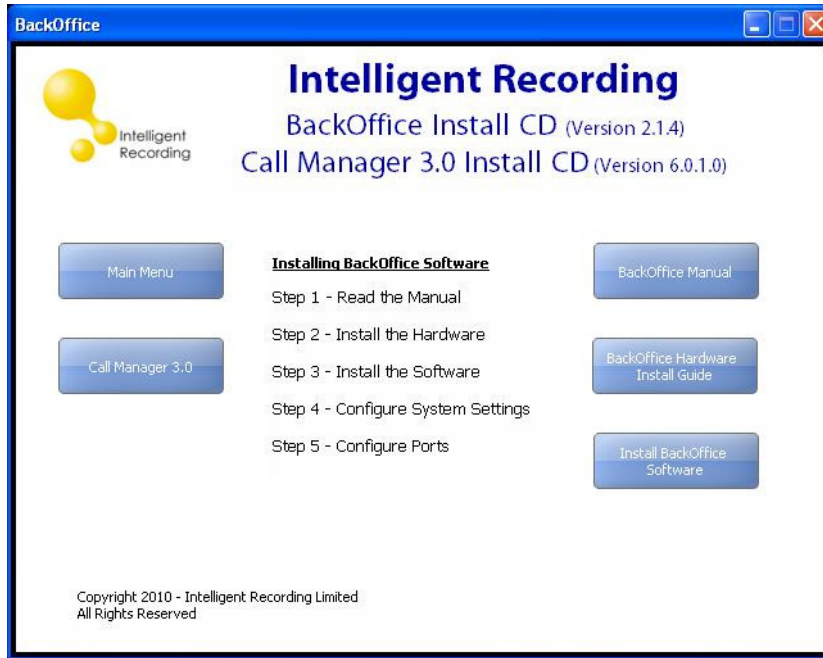
Once all devices are connected view the devices in Device Manager to ensure proper installation. The Digital Recorders will show as 'Digital Recorder', the Analog 04/08 as 'Multi-Port Analog Recorder', the Universal Adapter 3.0 will show simply as a Composite USB device.

## Connect Station Wiring

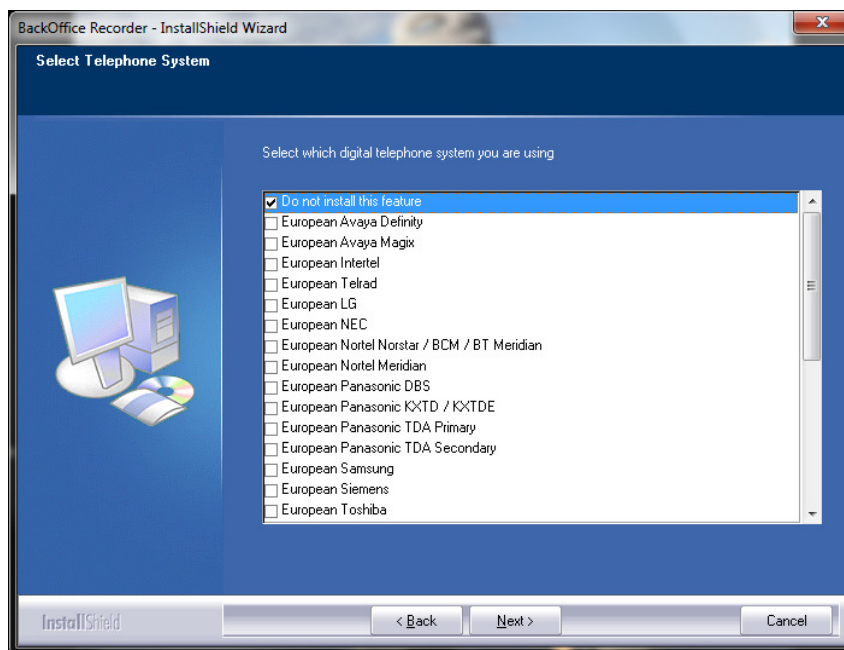
Finally, connect each telephone wiring as directed in the previous Hardware Section. Be sure to keep track with extension is connected to each port of the devices. It is recommended that you label each 'tap' at the RJ 11 end with the corresponding extension number.

## **STEP 4: Install the XTR BackOffice Software**

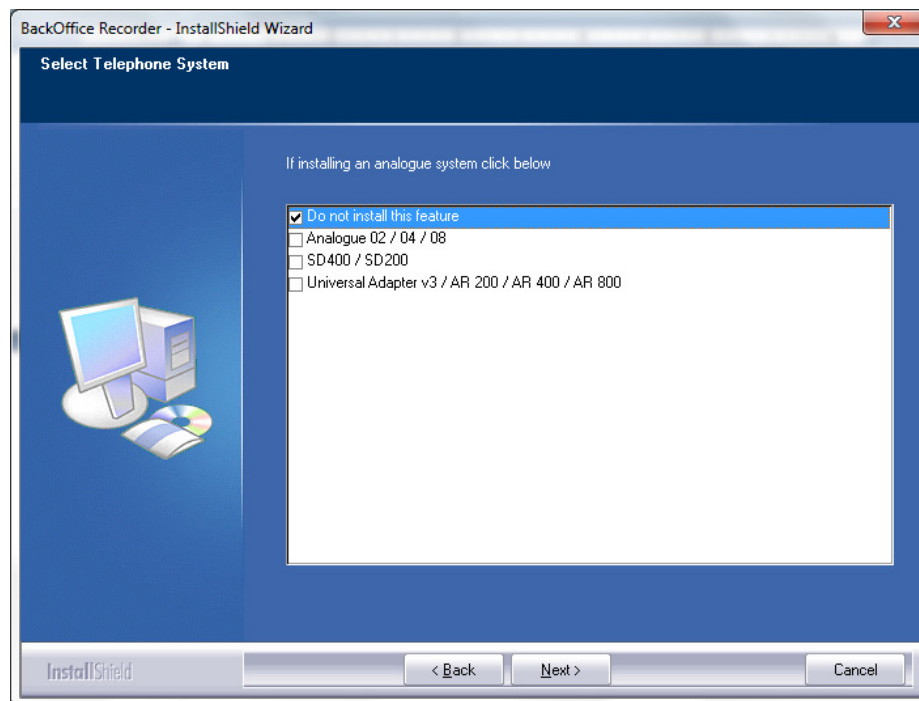
Insert the **BackOffice** CD into the CD drive of the PC.



1) **Click on the Install BackOffice Software Button.**



- 2) **Select the telephone system** type by clicking on the check box , if you are installing ONLY analog recorders leave as default of 'Do not Install', if installing a Dig04(s) or Dig16(s) then select the correct territory and Telephone System-Type. Please note: Choose European if in Territory that uses A-Law, US for the US and territories that use Mu-Law.
- 3) **Install Analog Recorders?** If installing any analog recorders, select devices here. If only installing Dig04/16 select Don Not Install this feature.



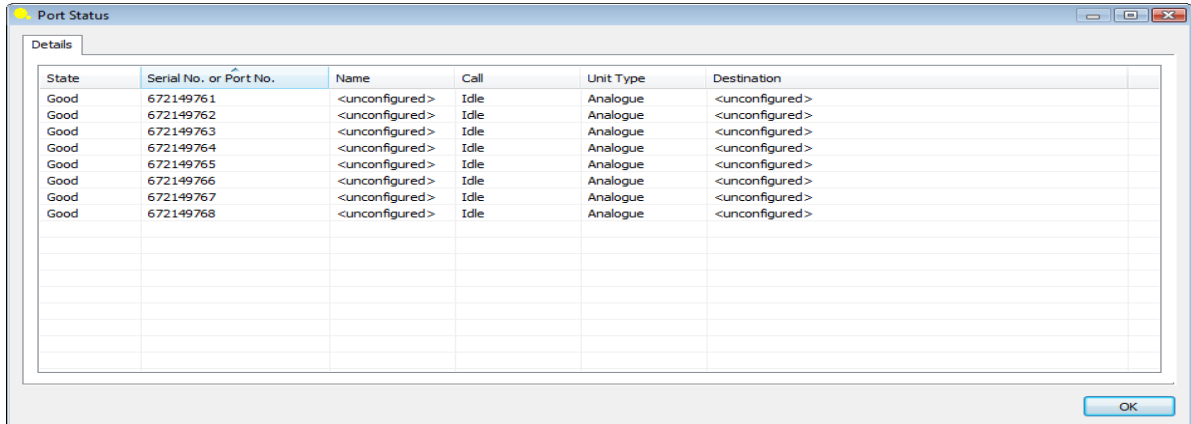
- 4) **Select Install location** or next to choose default location (recommended).
- 5) **Finish**
- 6) You will now have a shortcut on your desktop for Backoffice Recorder



Backoffice Recorder.Ink

**Note:** There are differences in the hardware interfaces for many PBXs. Not all versions use compatible hardware. You will get an 'incompatible device' error if you try to run software on an incompatible interface or if you load choose the wrong PBX type.

7) Click on the BackOffice Recorder shortcut on your desktop, this launches the BackOffice System Tray icon.



The screenshot shows a window titled "Port Status" with a "Details" tab. It contains a table with the following data:

State	Serial No. or Port No.	Name	Call	Unit Type	Destination
Good	672149761	<unconfigured>	Idle	Analogue	<unconfigured>
Good	672149762	<unconfigured>	Idle	Analogue	<unconfigured>
Good	672149763	<unconfigured>	Idle	Analogue	<unconfigured>
Good	672149764	<unconfigured>	Idle	Analogue	<unconfigured>
Good	672149765	<unconfigured>	Idle	Analogue	<unconfigured>
Good	672149766	<unconfigured>	Idle	Analogue	<unconfigured>
Good	672149767	<unconfigured>	Idle	Analogue	<unconfigured>
Good	672149768	<unconfigured>	Idle	Analogue	<unconfigured>

The status screen is now displayed or can be viewed by Right-Click on System Tray icon and Select 'View Status' The Recorder Port Status screen is not used for configuring, it is only a display of current status of the Recorder Hardware and Software :

**State:** The current state of the port.

**Serial No. or Port No.:** Serial number of the port or user defined port details.

**Name:** The name of the channel.

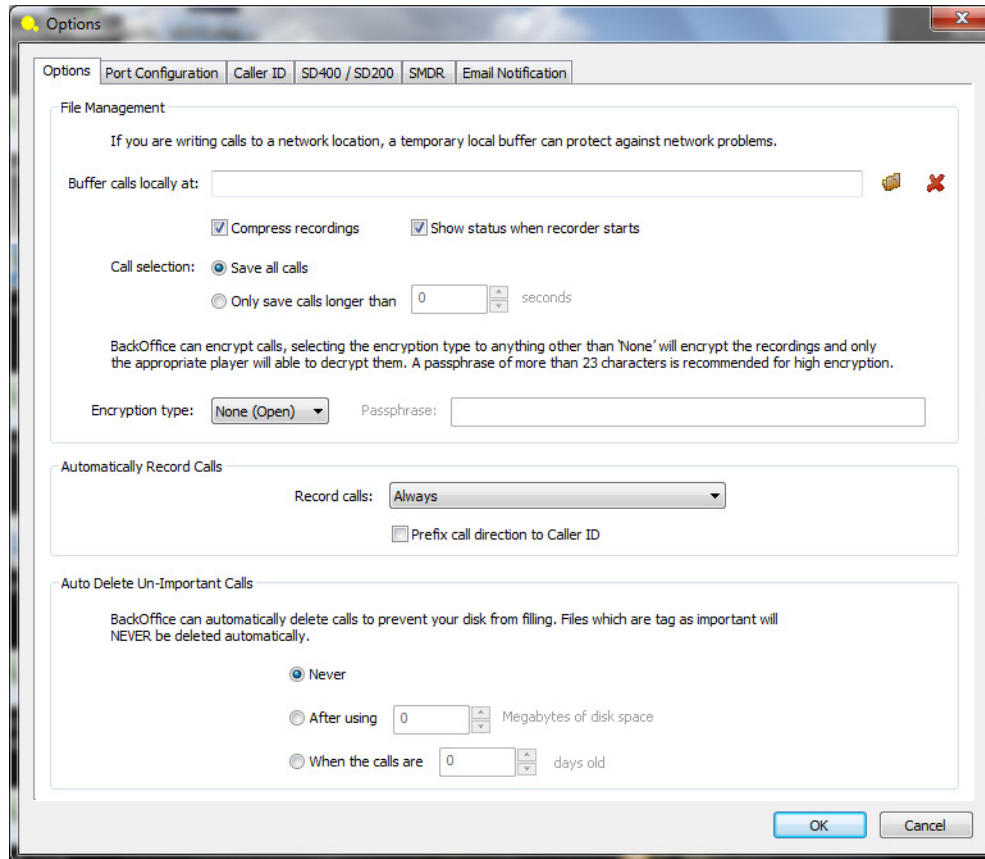
**Call:** The current call state of the port.

**Unit Type:** Type of the hardware device.

**Destination:** The destination where the call is going to be stored.

## 8) Options Set Up

Exit Status Screen, then right Click on Sys Tray Icon and select 'View Options'



**Buffer calls:** a default location is created to buffer the 'live calls' once recording is completed the call is then moved to storage location specified for each port.

**Compress recordings :** uses a compression technique to store the recording more efficiently (168 Hours per GByte)

**Call Selection :** although the Recorder STARTS recording immediately, this setting tells the system only to SAVE calls longer than this preset.

**Encryption type:** NOTE: requires purchase of Encryption Licensing – Contact your reseller for details.

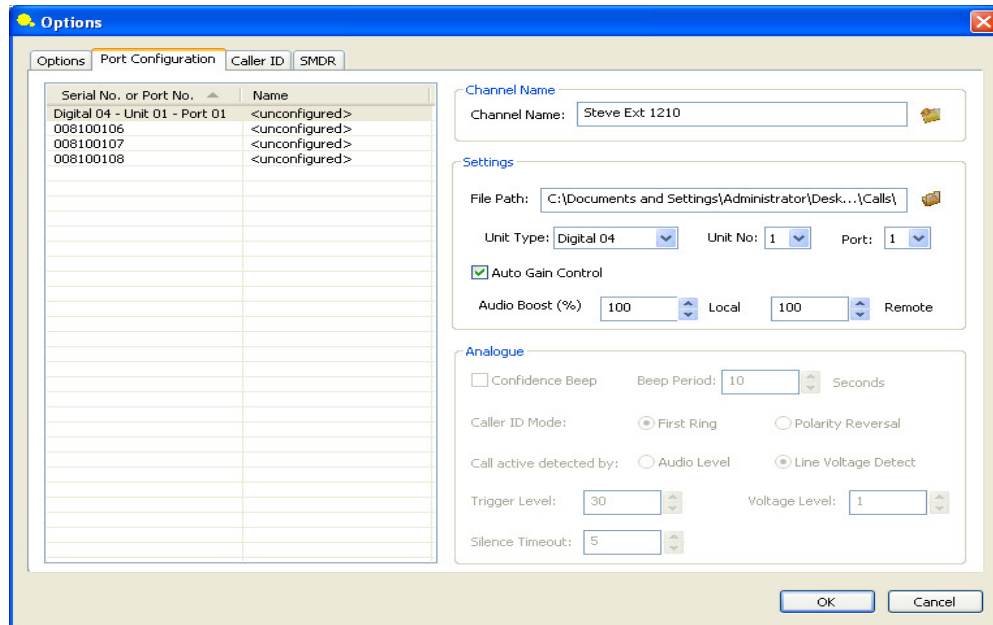
**Automatically Record Calls:** It is recommended that you select 'always' on some PBX systems setting can be changed to specify recording specific inbound or outbound calls, check with your vendor for more information.

**Auto Delete Un-Important Call,** this can be set to delete calls after 'x' number of days or after a define amount of disk space has been used.


NOTE: Calls marked as Important during playback will NOT be auto-deleted by this setting.

The Recorder will now record every call to and from the telephones. It is important to use proper procedure to shut down the application and PC when necessary. However, it is recommended that the Recorder PC is left on at all times.

## 9) Port Configuration



Click on **Port Configuration** Tab. This is where you name and map each recording channel, when un-configured each channel has an assigned serial number that appears as shown above.

**Channel Name:** Name the Channel as you want the recordings to be identified for this user. After naming, clicking the  icon next to the line will create a storage folder for this user under the My Documents/My Calls/'channel name' folder. This can also be changed to any location preferred.

### Settings Options:

This area of the program allows the installer to change the reference of a recorder channel from serial numbers to an easily recognizable name (ie Digital 04-Unit 01- Port 01) as well as map to the preferred storage location for each port and set audio balancing if desired.

**File Path:** This is auto-configured is desired, but can be changed by browsing to a folder location desired. It is highly recommended that each channel or port have their own folder for storage. This will make it much easier and quicker to find specific calls.

**Unit Type:** Select what type of recorder hardware installed for this channel (in example above it is a Dig04)

**Unit No:** Select Unit number – it is recommended that when more than one is installed that the installer label then with a unit number ( ie. 1, 2 etc)

**Port:** Identify which port or channel (from left to right 1-4) on device.

**Auto Gain Control:** This control is recommended, the recorder system will balance the audio level of the resulting recording based on levels received.

**Audio Boost:** If desired, this enables the installer to over-ride the Auto-Gain settings and provide manual boost to either side of the recording. Note, 100% and 100% is default and is the recording with NO gain. If you choose to boost the recording levels, you would increase from 100%.

Once all ports are configured , click 'OK' to exit this screen. In most cases, this completes the installation of the software.

## 10) Port Configuration (for Ana02/04/08 only)

Analogue

Confidence Beep    Beep Period:  Seconds

Caller ID Mode:     First Ring     Polarity Reversal

Call active detected by:     Audio Level     Line Voltage Detect

Trigger Level:     Voltage Level:

Silence Timeout:

**Confidence Beep** - this will play a tone audible to parties on the conversation

**Caller ID Mode** - In most cases Caller ID (if provided) will be captured using the 'First Ring' method.

**Call Active by** - If connected to outside lines, use Line Voltage detect, if off PBX extensions you will need to use Audio Level.

**Trigger Level** - use only if Audio Level is used, in most cases 30 will suffice, but if calls do not start , lower this level.

**Voltage Level**- recommended to leave at default , but can increase or decrease sensitivity to Voltage Shift.

**Silence Time Out**- determines how long a pause will be used to determine 'stop' of a conversation when audio level is used. Recommend 8 seconds.

## 11) Caller ID Tab:

Options

Options | Port Configuration | Caller ID | SD400 / SD200 | SMDR | Email Notification

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 10 seconds

Trigger audio recording from remote end only

Use with open mic headphones

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 halt recording 2500 ms

OK Cancel

These settings are factory preset for the system-type selected. This section enables the installer to customize areas of the program that determine when and how the caller ID is taken from the display of the telephone (on supported systems). In MOST cases, the installer should not change these settings. In ALL cases, test calls should be made to first determine if all is set properly prior to changing any settings. It is recommended that you contact Intelligent Recording/Comvurgent for assistance if changes in this area are required.

## 12) SD 200/SD 400 and SMDR Tabs

**These tabs are reserved for future products and should not be used by the installer at any point.**

## 13) E-Mail Notification Tab:

Use this section to setup email notification if service fails or hardware is removed:

The screenshot shows the 'Options' dialog box with the 'Email Notification' tab selected. The dialog has a title bar with a yellow icon and a close button. The tabs are 'Options', 'Port Configuration', 'Caller ID', 'SD-400 / SD200', 'SMDR', and 'Email Notification'. The 'Email Notification' section contains three checkboxes: 'Enable email notification' (checked), 'Send alert if the number of unallocated calls is greater than 5 calls', and 'Send alert if a hardware failure or unplug has been detected'. Below these are two statistics boxes: 'Statistics' showing 0 calls recorded and unallocated today, and 'Test Email Settings' with a 'Test Settings...' button. The 'Email Server' section has fields for SMTP server, port (25), username, password, to, subject, and a text area for the mail message. 'OK' and 'Cancel' buttons are at the bottom.

Options

Options | Port Configuration | Caller ID | SD-400 / SD200 | SMDR | Email Notification

Email Notification

Enable email notification     Send alert if the number of unallocated calls is greater than 5 calls

Send alert if a hardware failure or unplug has been detected

Send alert if a recorder service has started or stopped

Statistics

Number of calls recorded today: 0

Number of unallocated calls today: 0

Last unallocated call: None

Last recorded call: None

Total number of unallocated calls: 0

Test Email Settings

After filling out the information on this screen, we recommend you test your settings by clicking the button below. (Requires network connection)

Test Settings...

Email Server

Outgoing mail server (SMTP):  Port: 25

Username:

Password:

To:

Subject:

Mail message:

OK Cancel

## Choosing and Installing Player Options

There several Player options available with the BackOffice Recording solution.

- **Desktop Player** can be loaded on an individual user's PC, giving the user complete access (although restrictions can be applied) to call management: deleting calls, e-mailing conversations, exporting to wav file, etc. This software can be downloaded from [www.usbcallrecord.com](http://www.usbcallrecord.com) for free.
- **Call Manager Player** enables a supervisor(s) to search for calls, playback calls, associate notes about the calls and mark them as important as well as delete or email conversations. Please refer to the Call Manager Installation Manual for instructions or the instructions provided on the CD.
- **XTR Reporter Pro**- same functionality as Call Manager as well as advanced visibility, access, analysis and reporting tools for Xtension Recorder Administrators that want to do more than simply listen to recorded calls, for those that want to use data to help manage their business. XTR Reporter Pro also adds the Agent Evaluation module Call Scoring. Provides customized scoring forms and criteria and detailed support to quickly identify strengths and weaknesses within your business.

These Packages can be applied in any number of configurations within the organization providing control and management where needed and simple playback in other locations.

### *Contact Intelligent Recording/Comvurgent*

For more detailed information regarding the products discussed in this document or to inquire where to purchase, you can visit us on the web at [www.usbcallrecord.com](http://www.usbcallrecord.com) or call

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