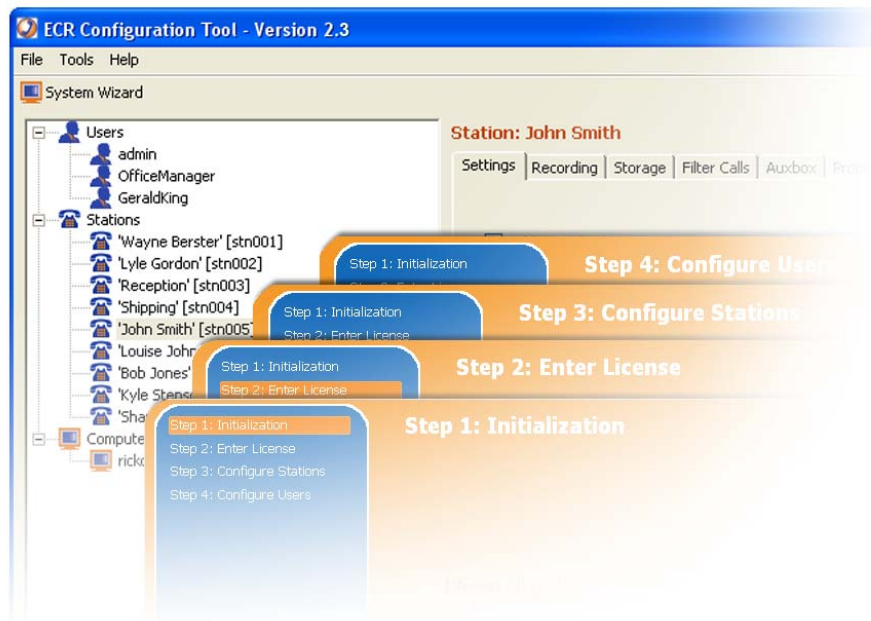


Enterprise Call Recorder ECR Configuration Tool



User Guide

Algo ECR Version 2.3
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About this Manual

This User Guide includes the information you need to configure and administer the ECR System using the ECR Configuration Tool, one of the three main interfaces for the ECR system. Designed for use *after* ECR has already been set up, this manual covers several topics related to the ECR Configuration Tool, including how administrators can edit user settings, change passwords, edit station names, and make configuration changes.

During installation, all initial configuration is done via the System Wizard, a key component of the ECR Configuration Tool. For details on using this component, please refer to the ECR Installation & Setup Guide.

Who this Manual is for

This manual is for administrators who will manage and configure ECR Software and its associated components to view and access call records and telephone station activity across a network.

How this manual is organized

This manual is organized into four main sections.

The first section (“The ECR Configuration Tool Interface”) provides an overview of the ECR Configuration Tool software interface, provides an explanation of the various sections of the interface (including the System Wizard, the Instance List, and Configuration Panel), and describes the functions provided from the main Drop-Down menu.

The next three sections deal, in-depth, with the three main parts of the Instance List: Users, Stations, and Computers.

The “User Configuration Settings” section provides a complete description of how to configure user settings, including setting passwords and privileges.

The “Station Configuration Settings” section provides a complete description of how to configure telephone stations, including setting Save modes, configuring HotKeys, and handling station licenses.

The final section (“Computer List”) covers the information provided on all the PC’s that are used in the ECR system.

Related Documentation and Software

For help installing ECR, please consult the QuickStart guide that is provided with your ECR call recording hardware. In addition, you can refer to the ECR Installation and Setup Guide.

Support Information

ECR includes one year of support from the date of purchase. Support agreements are available to extend this support period. Please contact Algo for information and pricing.

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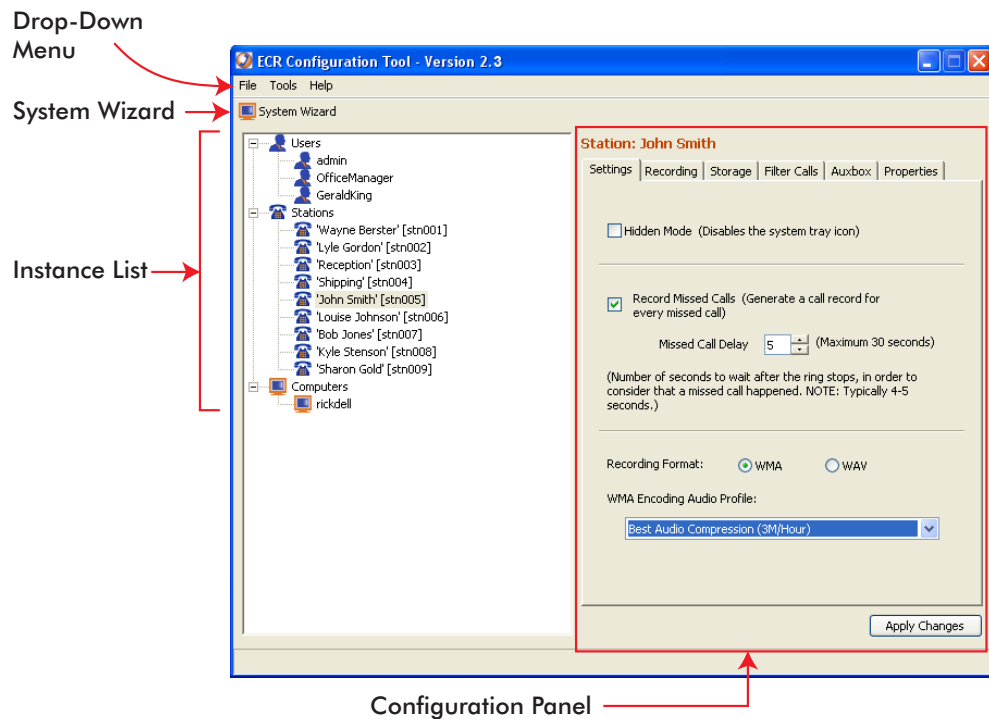
The ECR Configuration Tool Interface

The ECR Configuration Tool is the primary interface for configuration and administration of the ECR System. The application provides an easy-to-use wizard for Station and User creation, and a wealth of configuration options to customize the recording system.

The following sections describe the interface as well as provide a full description of the features available in the application.

Main Interface

The ECR Configuration Tool interface is made up of four main areas: the main drop-down Menu, the System Wizard, the Instance List, and the Configuration Panel.



Drop-Down Menu

Includes the drop down menus: File, Tools, and Help. For a complete description of the Tools menu, please refer to "Tools Menu Functions" on page 9.

System Wizard

The System Wizard is a helpful tool when installing new recording hardware to the system. Refer to "System Wizard" on page 6 for more information.

Instance List

Includes three expandable lists: Users, Stations, and Computers.

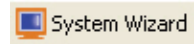
Configuration Panel

Contains relevant properties, in a tabbed format, for any item selected in the Instance window. A wide variety of properties for Users, Computers and Stations are configurable from this panel. For detailed information on settings that apply to each of these lists, please refer to the following sections:

- Users: "User Configuration Settings" on page 14
- Stations: "Station Configuration Settings" on page 18
- Computers: "Computer List" on page 24

System Wizard

The System Wizard is the primary interface for setting up and updating ECR system hardware and station licenses.



Based on an easy-to-follow process, the System Wizard will allow you to perform the following four steps:



1) Initialization

- Detect and verify compatibility of all recording hardware devices that are currently attached to the system
- Update device firmware as necessary to ensure system compatibility

2) Enter License

- Enter, add, and confirm hardware station license information

3) Configure Stations

- Name and describe telephone stations related to each hardware component

4) Configure Users

- Set up and update ECR user names, passwords, and system access privileges

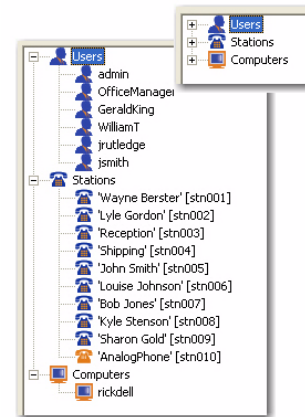
Before using the Station Wizard, ensure that all your recording hardware has been properly connected to your system. Note also that to use the System Wizard you will need to temporarily shut down recording.

For a detailed description of using the System Wizard, please refer to the ECR Installation and Setup Guide.

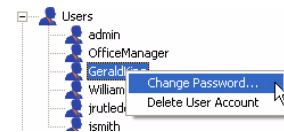
Instance List

The Instance List provides an expandable and simple to access list of all the Users, Stations, and Computers that make up the ECR system. The list makes it easy to select an item to access information and to make configuration changes as necessary.

To expand a list, click on the + sign to the left of each list heading.

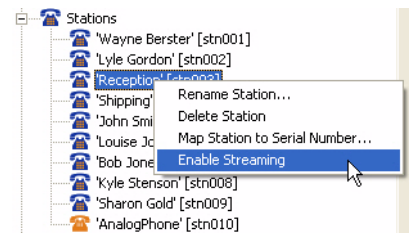


Right clicking any item in the listing will pop up adjustable diagnostic settings. For example, right-clicking any User name will bring up the Change Password and Delete User account options.



Right-clicking a Station name will bring up the following four options:

- Rename Station
- Delete Station
- Map Station to Serial Number
(Note that this is a method to manually set this information. Automatic mapping of hardware serial numbers to Stations normally is set through the use of the System Wizard during the Installation process)
- Enable Streaming (refer to "Privileges Tab" on page 15)



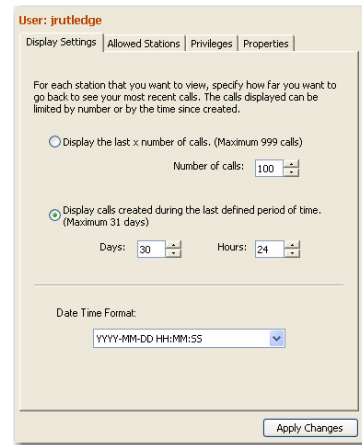
Left click on any item in the Instance List to update the Configuration Panel with selection options.

Configuration Panel

Contains relevant properties, in a tabbed format, for any item selected in the Instance window. A wide variety of properties for Users, Computers and Stations are configurable from this panel.

For more information on setting and viewing properties in the Configuration Panel, refer to:

- “User Configuration Settings” on page 14
- “Station Configuration Settings” on page 18
- “Computer List” on page 24



Help

User Guide

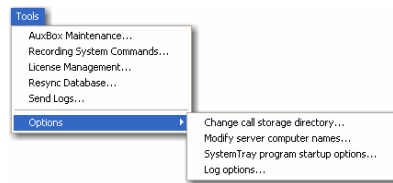
Opens an Adobe Acrobat (PDF) version of this User Guide. To read the file, your PC will require Adobe Acrobat Reader which can be downloaded for free from <http://get.adobe.com/reader/>

About

Contains version information for the current version of ECR Software. Also provides contact information for Algo Communication Products Ltd.



Tools Menu Functions



System wide options and control is available from the Tools drop down menu. Each feature available from this menu item is detailed below.

Hardware Maintenance

If there is recording hardware attached to your PC, the Hardware Maintenance interface provides access to these devices for programming firmware and Serial Numbers.

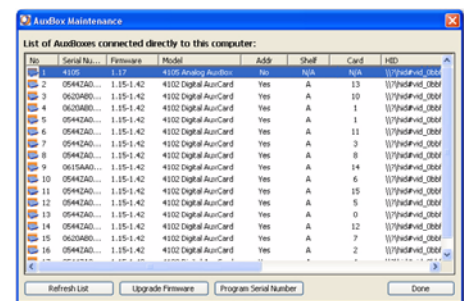
Note that before accessing these devices, the recording system will need to be temporarily shut down.

All recording devices attached to the PC will be listed in the Maintenance window. The Serial Number, Firmware Version, and Type of Algo Recorder are listed.

Recorders can be disconnected or connected to the PC with the maintenance window open. Click the <Refresh List> button to update the listing.

To program a recorder, left click on a listed recorder. The lights on the front of the selected recorder will flash when selected. Then click on the buttons at the bottom of the window to perform the desired operation.

To upgrade the Firmware of all attached 4102 AuxBoxes and 4102R AuxCards simultaneously, right click on any listed recorder and select <Upgrade all 4102 AuxBoxes>.



Recording System Commands

Access to global and local recording system commands are provided through this interface.

The upper controls provide control over the recorders attached to the local PC, be it Server or Client. When this function is accessed from the ECR Server PC, the upper controls are labeled “ECR Server System”. When this function is accessed from a Client PC, the upper controls are labeled “Client System”.



The Client and Server Recording commands will start up or shutdown all recorders globally for the entire ECR system. Use these commands with caution as critical call recording can be disrupted.

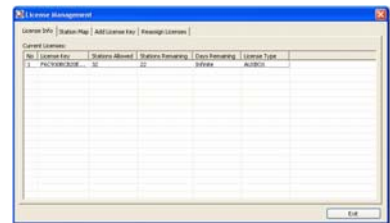
Note these controls only affect the recording system programs. Open graphical interfaces (such as the Station View or Call Finder view) will not be affected by these controls.

License Management

A number of helpful panels are provided to manage ECR recorder licenses.

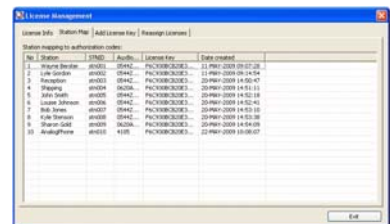
License Info

Lists all current license keys entered into the ECR system.



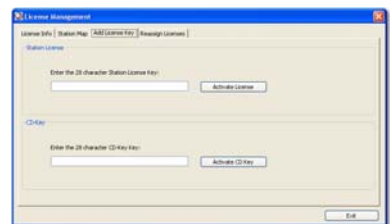
Station Map

Lists each Station and which license key that Station's active license is drawn from.



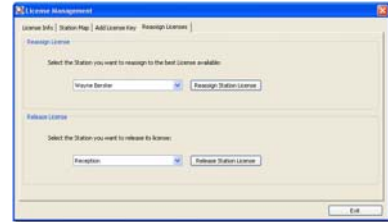
Add License Key

Station license keys can be added to the ECR after initial installation.



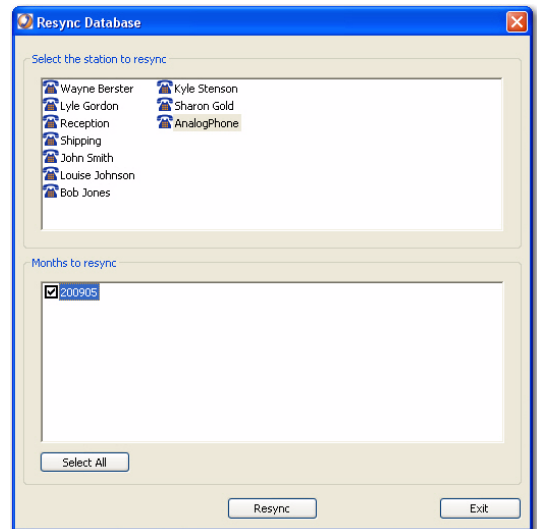
Reassign Licenses

Licenses can be moved from one recorder to another when free licenses aren't available or when transitioning from Trial licenses to permanent licenses.



Resync Database

Use this feature to rebuild the call database. This is only required if call records have been added or deleted directly to the call storage directories from outside of the software. This step should not be required in normal operation. When activated, this feature reads all the call record files in the selected directories to rebuild the call database used for searching and displays.



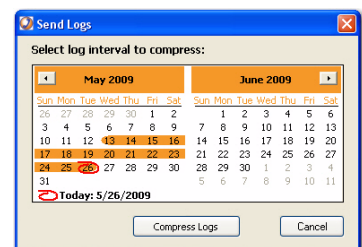
To use this function:

1. Select Tools>Resync Database
2. Select the station that you want to resync
3. Check one or more monthly folders of call data. Each folder is identified by the year-month format of yyymm. For example, to repair the database holding calls for July 2009, select the 200907 folder.

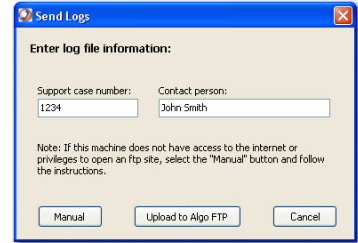
Send Logs

This option is used to gather all the ECR event logs and settings and zip them into a file that can be sent easily to Algo support for troubleshooting purposes.

When you select this function, a calendar will appear where you can set the start and end dates for the log data.



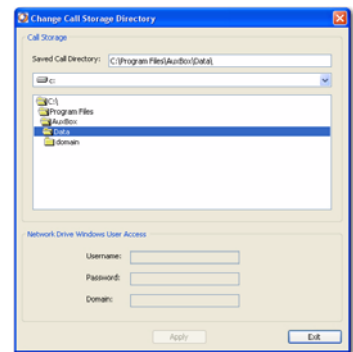
Selecting the Compress Logs button will compress the information into a small file for sending onto Algo technical support.



Options

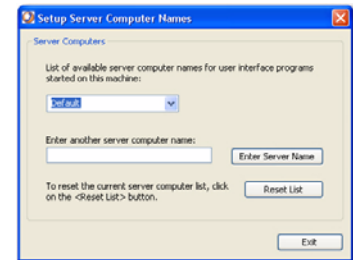
Change call storage directory

The call storage directory and mapped drive login information can be changed from this interface. Required subdirectories are created automatically.



Modify Server computer names

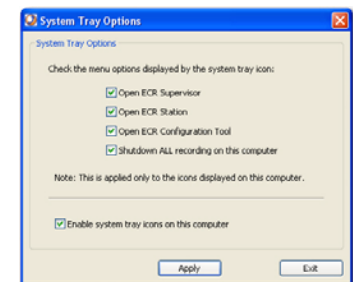
ECR Supervisor Viewer and ECR Configuration Tool can be configured to access more than one ECR Server. Adding computer names of other ECR Server PCs will enable a selection pull down menu in the login splash screen.



System tray program start-up options

The Windows system tray pop-up menu can be customized to list only specified ECR applications.

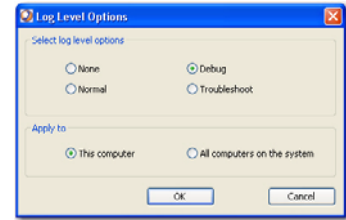
The system tray icons can also be disabled completely if desired. For Windows XP systems where multiple System Tray icons are displayed, it is recommended that System Tray icons be disabled on the ECR Server to optimize system performance.



Log Options

The software log detail is configurable to avoid excess use of disk space when detailed information is not required. 'Normal' is the default for regular ECR operation.

Note: Debug and Troubleshoot settings should only be used on the advice of Algo technical support personnel.



User Configuration Settings

User specific options are accessible by selecting entries in this list. Left click on a User name to view and modify User settings in the Configuration Panel.

Display Settings Tab

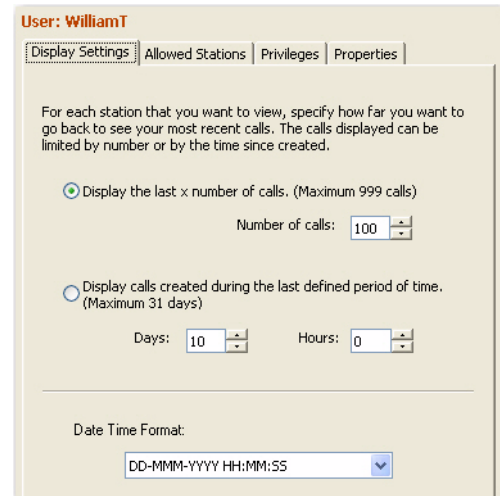
This tab includes options for controlling how many recent calls will be displayed in the Station View's list of call records.

In addition, this tab allows users to set the format of the date display for call records.

The settings in this tab apply to the Station View window for the user's ECR Station Viewer as well as for the ECR Supervisor (if enabled for that user).

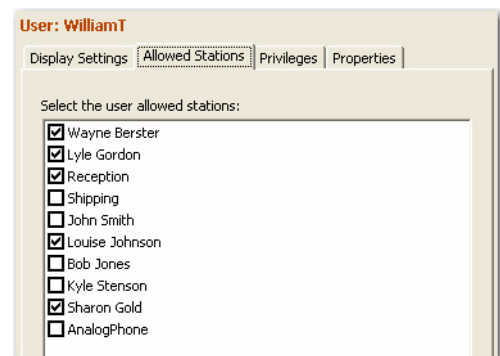
The display of calls can be limited by:

- Number of calls (up to 999)
- Period of time (up to 30 days for the 'Days' drop-down box, and up to 24 hours for the 'Hours' drop-down box)



Allowed Stations Tab

Station access from the ECR Supervisor interface can be reviewed and modified from this tab. The User will have access to checked Stations. Unchecked Stations will be inaccessible from all interfaces the User has access to.



Privileges Tab

The User Privileges list defines the access levels of the selected User. Access level can be customized from full ECR Supervisory level, full access, to highly restricted operator access, login permission only.

The following summary describes each of the Privilege settings:

Manage user accounts and security

Allows modification of User's Allowed Stations and Privileges in the ECR Configuration Tool.

Configure stations and system

Allows access to the ECR Configuration Tool and configuration functions. Normally reserved for the System Administrator only.

Allow ECR Supervisor view access

Allows access to the ECR Supervisor interface. If unchecked, users will still have access to the ECR Station Viewer.

Allow diagnostic view access

Allows access to the Diagnostics interface from within ECR Supervisor Viewer. When granted, this function can be accessed from the Supervisor Viewer's Main Menu (Tools>Diagnostics) and subsequently from the Diagnostics View tab.

List and search Station call record database

Allows User to view Station call records and search call database with the Call Finder. This level of access is required for playback and access to call record history.

Delete call record files

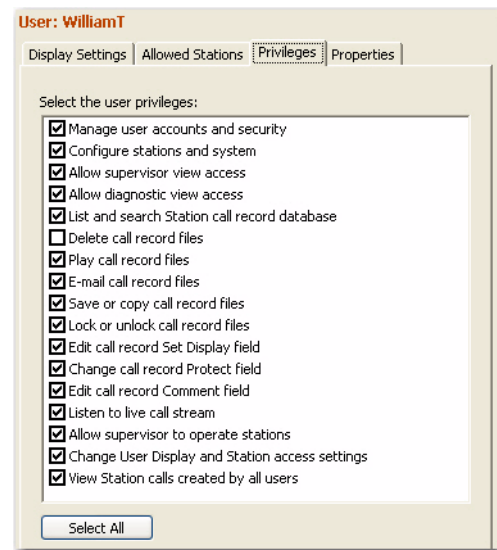
Allows User to delete calls from the call record database.

Play call records

Allows User to play back recorded conversations from call database.

Email call record files

Allows User to Email call records.



Save or copy call record files

Allows User to save and copy call records.

Lock or unlock call record files

Allows access to locking feature. Access to call display information and playback by other Users is prevented when a call record is Locked. Also makes call record unplayable by programs outside the ECR.

Edit call record Set Display field

Allows Set Display field of call records to be modified.

Change call record Protect field

Allows access to the Protect feature. User attempted and automatic deletion of call records is prevented when a call is Protected.

Edit call record Comment field

Allows changing of comment field after the call has been completed.

Listen to live call stream

Allows access to live call streaming in the ECR Supervisor. Note that, as a shortcut, this privilege can also be set by right-clicking a User name from the Instance list (refer to "Instance List" on page 7)

Allow supervisor to operate stations

Allows an ECR Supervisor to remotely control Station recording. ECR Supervisor can control on demand recording via keyboard hotkeys or Station View interface button when viewing a Station.

Change User Display and Station access settings

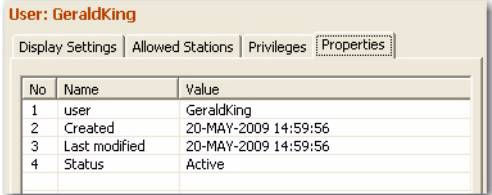
Allows access to User Display and Station settings options in the ECR Supervisor and ECR Station Viewer applications.

View Station calls created by all users

Allow User to view call records logged by other Users at a Station. Without this privilege, the User will be restricted to viewing only calls that they have made while logged into a Station. Applicable for call centers or shift work applications.

Properties Tab

Listing of basic properties associated with the User account.



The screenshot shows a user configuration window for 'User: GeraldKing'. It has four tabs: 'Display Settings', 'Allowed Stations', 'Privileges', and 'Properties'. The 'Properties' tab is active and displays a table with the following data:

No	Name	Value
1	user	GeraldKing
2	Created	20-MAY-2009 14:59:56
3	Last modified	20-MAY-2009 14:59:56
4	Status	Active

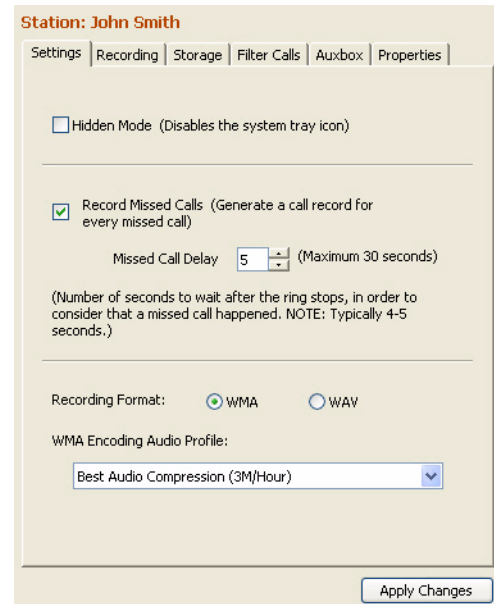
Station Configuration Settings

Station specific options are accessible by selecting entries in this list. Left click on a Station name to view and modify Station settings in the Configuration Panel.

Settings Tab

The Settings tab allows administrators to set:

- the status of the Hidden Mode
- whether Missed Call records will be generated and, if so, the time delay associated with generating those records
- the audio recording format and associated file size and compression for the call record files



Hidden Mode

This option disables the Windows system tray icon for that Station. Global system tray icon control can be accessed via the Tools>Options menu ("System tray program start-up options" on page 12).

Record Missed Calls

You can choose to have ECR log missed calls or not for a particular station. A log of missed calls can be very useful to gauge telephone activity.

When enabled, ECR will generate a missed call record whenever the telephone rings but is not picked up. This record stores the time and date of the call as well as Caller ID information.

▶ *Note that logging missed calls should be disabled when a single inbound call rings multiple telephones, as in hunt groups, to avoid large scale generation of missed call records*

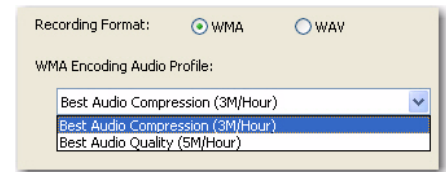
Missed Call Delay

This option defines the interval ECR waits at the end of ringing before a missed call record is generated. The adjustment compensates for ring cadence variations and delays between ring and the telephone in-use

events. Adjust the detection delay if missed calls are generating multiple records. Note that while the time delay can be set for up to 30 seconds, a typical setting will be 4 to 5 seconds.

Recording Format

ECR allows calls to be stored in either WAV format (raw 8kHz, 16bit data) or compressed Windows Media Audio® (WMA). The WMA data rate is selectable from pull down menu. WAV recording provides the best recording quality, but consumes storage space very quickly: 29 MB per hour.

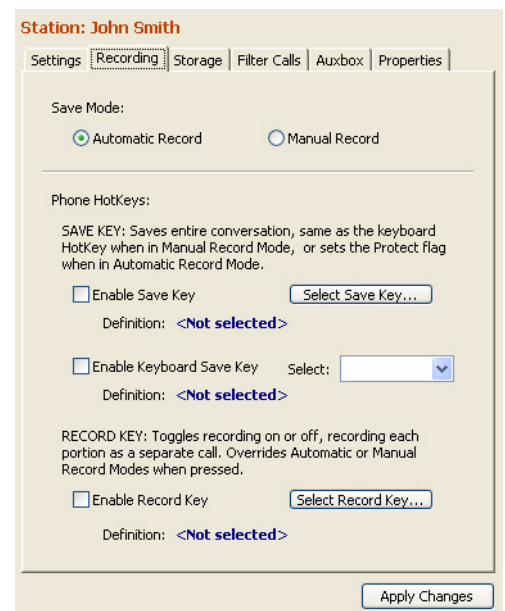


The WMA recording compression can be set to either 3MB or 5MB per hour. The 5MB per hour setting offers improved audio quality at the expense of increased storage usage.

Recording Tab

The Recording Tab allows administrators to set:

- whether calls will be saved automatically - or manually by the user
- what phone or keyboard keys users can use to trigger the manual saving of call records or the setting of the call record protect flag
- what key can be used to toggle recording on or off



Save Mode

Sets the Station Save Mode to either Automatic Record or Manual Record. In Automatic Record mode, ALL station calls (including inbound, outbound, and missed calls) are automatically recorded and saved to the ECR database with the exception of:

- calls where the set display matches any of the patterns in the Filter Calls list, if configured (see "Filter Calls Tab" on page 21)

- Missed calls if the Record Missed Calls function is turned off (see “Record Missed Calls” on page 18).

In Manual Save mode, only those calls a user manually selects are saved into the ECR database.

Phone HotKeys

ECR supports two types of on-demand recording: Entire save (Save Key); and toggle record (Record Key).

Save Key Press the Save Key to store an entire call at any point during the conversation, or after the call has ended. ECR caches the last conversation to allow the call to be saved. A new call deletes the cached previous call.

Note: This feature is useful in Manual Mode as it allows the unsaved last call to be saved.

Record Key The Record Key allows a portion of a conversation to be stored as a call record. The first press of the Record Key begins audio recording from that point. A second press will stop recording and generate a call record containing the enclosed portion of conversation.

Storage Tab

To help manage call record files, ECR includes several options to help keep storage requirements low. You can choose to automatically delete call record files based on how old they are (number of days), how many there are, or how much hard disk space (in MB) they take up. Also, using the Call Deletion mode settings, calls may be deleted permanently, or to the PC Recycle Bin.

The screenshot shows the 'Storage' tab of the 'Station: John Smith' configuration window. It features a tabbed interface with 'Settings', 'Recording', 'Storage', 'Filter Calls', 'Auxbox', and 'Properties'. Under 'Limit Call Storage By:', there are four radio button options: 'Number of Days' (set to 1), 'Number of Calls' (set to 1), 'Disk Space Used (MB)' (set to 1), and 'No Limit' (which is selected). Below this, the 'Call Deletion Mode:' section has two radio button options: 'Permanent' (selected) and 'To Recycle Bin'. An 'Apply Changes' button is located at the bottom right.

Limit Call Storage By The size of the call record database can be limited in three ways:

1. By call record date
2. Number of call records in the database
3. By disk space used

When limiting by number of days, call records older than the defined limit are automatically deleted from the call database.

Cautions When limiting by number of calls or disk space, the oldest calls are deleted automatically once the defined limit is reached. If you set the system to automatically delete records based on days, number of calls, or storage space, keep in mind that there is a risk that you could occasionally delete wanted files. Therefore, it is important to set these conditions properly. Consider the following problematic cases:

Limiting by Number of Calls If someone calls the station fifty times one day while the user is out, it may prematurely push important records into the recycle bin.

Limiting by Number of Days If the user at the station has a schedule disruption, like an extended business trip, some of the call records they may have been expecting to review upon return may have already been deleted.

Limiting by Storage MB If a user at the station has one or more lengthy conversations that use up a lot of memory, it may prematurely push important records into the recycle bin.

Call Deletion Mode When call storage limiting is enabled, deleted calls can either be permanently deleted from the PC, or moved to the Recycle Bin.

Filter Calls Tab

Designed for use when the Save Mode is set to Automatic Record, the Filter Calls function can be used to avoid automatic recording of routine calls such as personal calls to or from a home telephone. Note that users can override this function and manually save files, if desired.

Filter by patterns Up to ten different phone numbers (or alphanumeric strings or 'patterns') can be entered into the Filter by patterns list that will be used to prevent calls from being automatically saved.

This function works by searching for the pattern in the set display. Thus, you can enter partial text or numbers instead of exact phone numbers or names. If there is a match, the call record is not saved.

Note that ECR will look for any match, so if you enter just "9" in the Filter Calls list, any number dialed that includes a 9 will not be recorded. Make sure you test your Filter Calls string to ensure you get the results you intend.

Filter by type

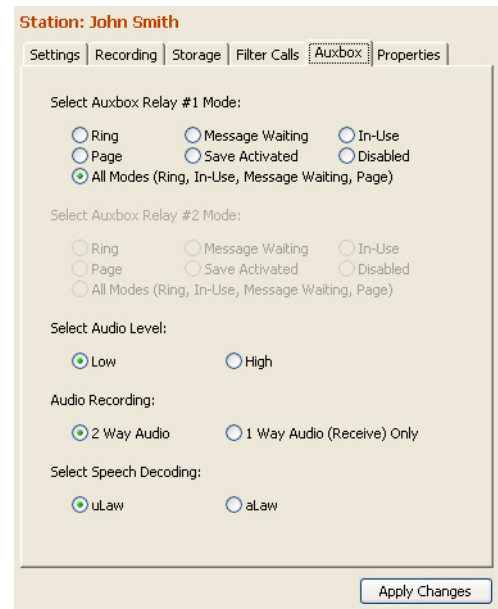
Filter Page Calls When checked, this function will set the system to not automatically save page messages that are sent to the telephone station.

**Filter Blank Set
Display Calls**

When checked, this function will set the system to not automatically save telephone calls when the Set Display field for the call is blank. This setting can be useful if, for example, a user regularly receives an excessive number of telemarketing or "junk" calls.

AuxBox Tab

The Auxbox tab allows you to set various relay modes for a station's AuxBox or AuxCard hardware, select audio levels, audio recording modes, and speech decoding modes.



Select AuxBox Relay Modes

The relay output(s) on the Station recorder can be configured to activate on different telephone states.

Depending on the AuxBox recorder attached, some selections may be disabled.

'All Modes' activates the relay on all event triggers with the exception of 'Save Activated'. Fast flash for Ring, on solid when In-Use, slow flash when a message is waiting.

'Save Activated' mode call is triggered when a call is set to be saved - either because the station is operating in automatic save mode or because manual recording has been triggered.

Select Audio Level

The digital and analog audio level is adjustable between two levels: Low and High. The low level provides more dynamic range for improved quality. The high maximizes audio gain to correct for low source audio levels.

Audio Recording

Audio output can be limited to receive audio only for applications that do not want the near side caller recorded. Radio call-in shows and radio dispatching are common uses for this feature.

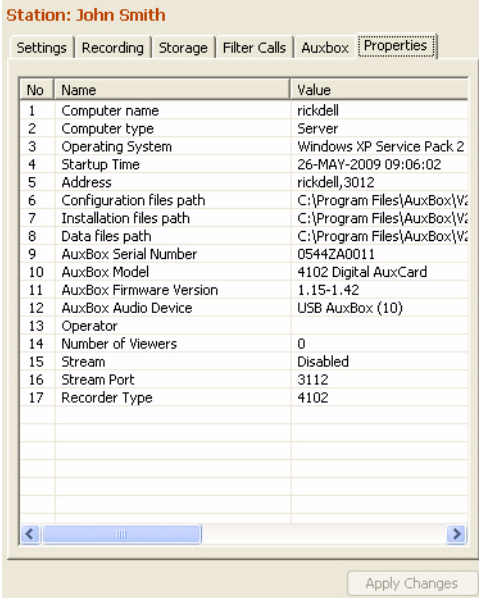
Select Speech Decoding

Audio on Nortel digital TDM telephones is encoded differently depending on region. For North America, this setting should be uLaw. In Europe, the setting should be aLaw.

Improper configuration of this setting will result in recordings that are unintelligible and garbled.

Properties Tab

Station variables and properties are listed in this tab. Used as a quick reference to view Station settings.



Station: John Smith

Settings | Recording | Storage | Filter Calls | Auxbox | Properties

No	Name	Value
1	Computer name	rickdell
2	Computer type	Server
3	Operating System	Windows XP Service Pack 2
4	Startup Time	26-MAY-2009 09:06:02
5	Address	rickdell,3012
6	Configuration files path	C:\Program Files\AuxBox\V...
7	Installation files path	C:\Program Files\AuxBox\V...
8	Data files path	C:\Program Files\AuxBox\V...
9	AuxBox Serial Number	0544ZA0011
10	AuxBox Model	4102 Digital AuxCard
11	AuxBox Firmware Version	1.15-1.42
12	AuxBox Audio Device	USB AuxBox (10)
13	Operator	
14	Number of Viewers	0
15	Stream	Disabled
16	Stream Port	3112
17	Recorder Type	4102

Apply Changes

Computer List

All computers on the network running ECR software are included in the Computer List. Various system values are available for debugging and general system information.





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