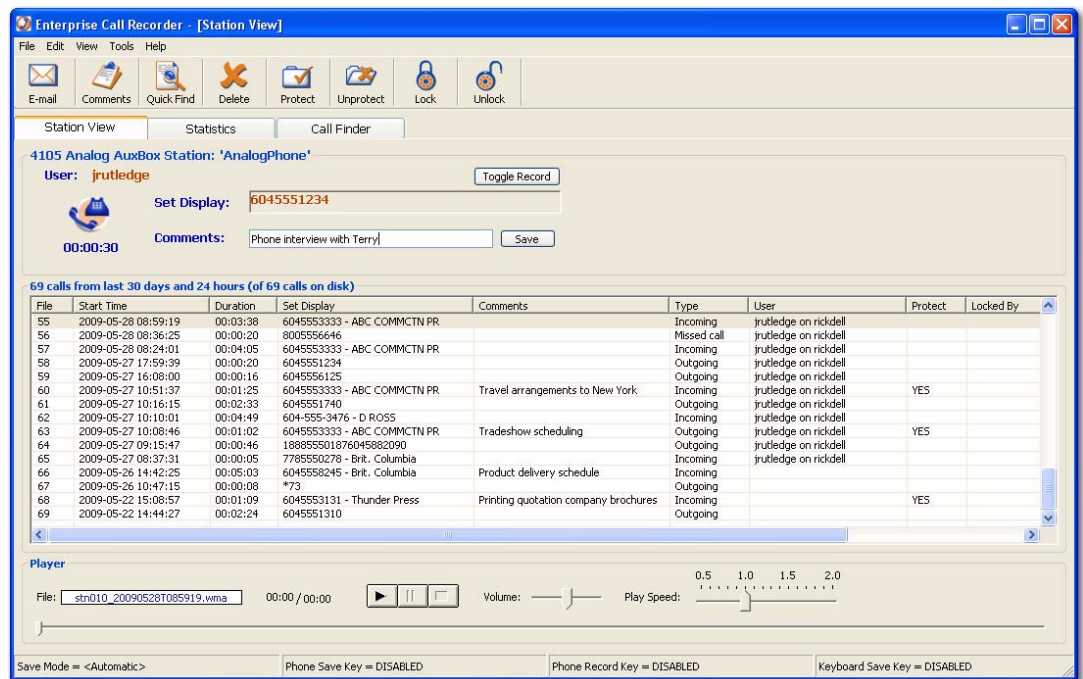


# Enterprise Call Recorder ECR Station Viewer



Enterprise Call Recorder - [Station View]

File Edit View Tools Help

E-mail Comments Quick Find Delete Protect Unprotect Lock Unlock

Station View Statistics Call Finder

4105 Analog AuxBox Station: 'AnalogPhone'

User: jrutledge

Set Display: 6045551234

Comments: Phone interview with Terry

00:00:30

69 calls from last 30 days and 24 hours (of 69 calls on disk)

File	Start Time	Duration	Set Display	Comments	Type	User	Protect	Locked By
55	2009-05-28 08:59:19	00:03:38	6045553333 - ABC COMMCTN PR		Incoming	jrutledge on rickdell		
56	2009-05-28 08:36:25	00:00:20	8005556446		Missed call	jrutledge on rickdell		
57	2009-05-28 08:24:01	00:04:05	6045553333 - ABC COMMCTN PR		Incoming	jrutledge on rickdell		
58	2009-05-27 17:59:39	00:00:20	6045551234		Outgoing	jrutledge on rickdell		
59	2009-05-27 16:08:00	00:00:16	6045556125		Outgoing	jrutledge on rickdell		
60	2009-05-27 10:51:37	00:01:25	6045553333 - ABC COMMCTN PR	Travel arrangements to New York.	Incoming	jrutledge on rickdell	YES	
61	2009-05-27 10:16:15	00:02:33	6045551740		Outgoing	jrutledge on rickdell		
62	2009-05-27 10:10:01	00:04:49	604-555-3476 - D ROSS		Incoming	jrutledge on rickdell		
63	2009-05-27 10:08:46	00:01:02	6045553333 - ABC COMMCTN PR	Tradeshaw scheduling	Outgoing	jrutledge on rickdell	YES	
64	2009-05-27 09:15:47	00:00:46	18885501876045882090		Outgoing	jrutledge on rickdell		
65	2009-05-27 08:37:31	00:00:05	7785550278 - Brit. Columbia		Incoming	jrutledge on rickdell		
66	2009-05-26 14:42:25	00:05:03	6045558245 - Brit. Columbia	Product delivery schedule	Incoming			
67	2009-05-26 10:47:15	00:00:08	*73		Outgoing			
68	2009-05-22 15:08:57	00:01:09	6045553131 - Thunder Press	Printing quotation company brochures	Incoming		YES	
69	2009-05-22 14:44:27	00:02:24	6045551310		Outgoing			

Player

File: strn010\_20090528T085919.wma 00:00 / 00:00    Volume:  Play Speed:

Save Mode = <Automatic> Phone Save Key = DISABLED Phone Record Key = DISABLED Keyboard Save Key = DISABLED

## User Guide

## **About this Manual**

This User Guide includes the information you need to use the ECR Station Viewer interface, one of the three main interfaces for the ECR Call Recording System.

### ***Who this Manual is for***

This manual is for “non-supervisor” end users who require access to the call records for a specific telephone station.

### ***How this manual is organized***

This manual is organized into four main sections.

The first section (“The ECR Station Viewer Interface” on page 4) provides an overview of the ECR Station Viewer and introduces users to the main elements of the program, including the three main views in the program (Station View, Statistics, and Call Finder).

The next section (“Call Record Context Functions” on page 10) provides a description of all the things you can do when you select a call record. This includes playing the record, emailing it, adding a comment to it, protecting it, locking it, and much more.

The third section (“Tools Menu Functions” on page 15) provides a description of various functions you can perform using the items under the Tools menu. This includes maintaining recording hardware, shutting down the recording system, exporting data to Excel, and changing the user password.

The final section (“Options” on page 17) describes the various settings of the program from the Tools>Options menu.

### ***Related Documentation and Software***

- ECR Installation and Setup Guide
- ECR Supervisor User Guide
- ECR Configuration Tool User Guide
- Hardware Quick-Start Guides

### ***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 Station Viewer Interface

The ECR Station Viewer provides non-supervisory access to call records for specific telephone stations. Subject to privileges granted by the ECR Administrator, ECR Station Viewer users will be able to search for and play back past call records, add comments, create statistical reports, send emails of recorded calls, and much more.

Users accessing a station with the ECR Station Viewer are logged on as the Station Operator, allowing ECR to track calls made by that user.

---

## Getting Familiar

The Station Viewer Interface is made up of three main views:

- Station View (default startup view)
- Statistics
- Call Finder

### Common Elements

There are several common elements to the View windows in the ECR Station Viewer Interface. These include:

- The Drop-Down Menu at the top of the screen
- Toolbar
- View Tabs
- Call Playback Panel

#### Drop-Down Menu



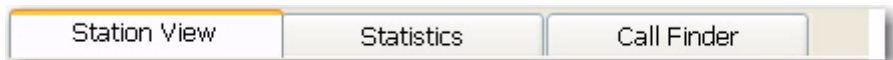
The drop-down menu provides a consistent navigation system throughout the Station Viewer Interface, available from all three main views.

#### Toolbar



The Toolbar contains icons for quick feature selection. For detailed information on these icons, please refer to “Call Record Context Functions” on page 10 . The Toolbar icons are greyed out when a call record is not actively selected.

#### View Tabs



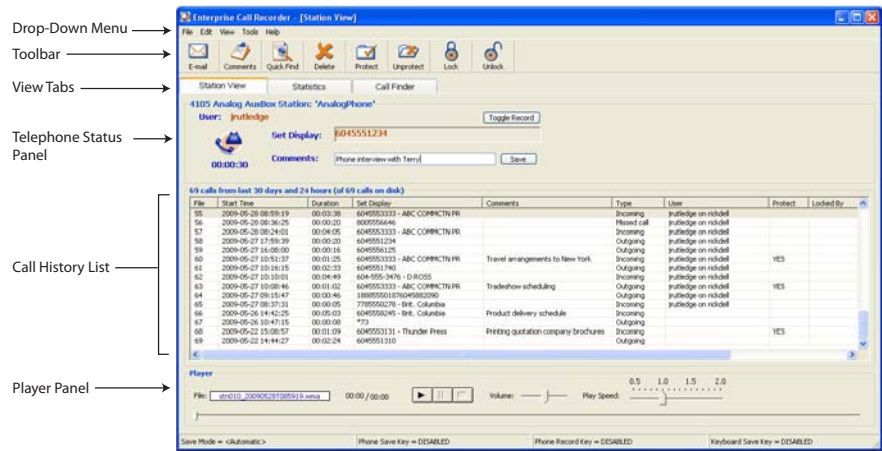
The View Tabs make it easy to switch between Views. Simply click on the tabs to change to the selected view.

**Player Panel**



The Player Panel is for playing back selected call records. For more information on this panel, please refer to "Tools Menu Functions" on page 15 .

**Station View**



The Station View is the primary interface to play back and manage recorded conversations.

**Telephone Status Panel**

Along with Set Display and real-time Call Duration information, an animated graphic in the Telephone Status Panel provides a visual representation of telephone status. While on a call users can enter comments about the call in the Comments field.

**Call History List**

The Call History List contains a listing of recent calls for the Station. To operate on a call record, left click on the desired call in the list and use the Toolbar to execute the desired operation. Alternatively, right-clicking on a call record pops up a handy quick menu including all the functions of the Toolbar in addition to items in the File and Edit menus.

To play back a call, left click on the desired call then use the playback controls at the bottom of the screen. Along with basic play, pause and stop controls, playback time and volume can be changed by use of the slider controls (refer to "Tools Menu Functions" on page 15).

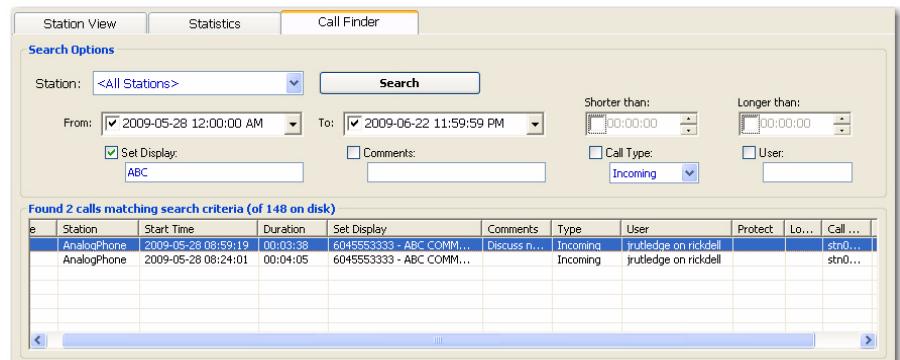
The Call History List list displays all of the relevant information related to each call record. This includes the start time, duration, set display, user entered comments, type of call, protection status, call record filename, and the file format (wma or wav).

- Clicking on each column heading automatically sorts the call records. You can use this feature to easily sort or locate calls.
- Each column is resizable. Just click on the border between two column headings and drag to the desired size.
- By selecting a call record and right-clicking, you can play or email the record, add or edit comments, edit set display text, delete the record, protect the record from automatic deletion (or unprotect it), save the record as an external file, or copy the record to another directory.
- Because ECR call records are Windows files, they can be selected, copied, or dragged-and-dropped from the Call History List to different folders, back-up media, emails, or your desktop.

### **Call History List Column Descriptions**

<b>Start Time</b>	Time and date of the start of the call.
<b>Duration</b>	The duration of the recorded conversation with one second resolution.
<b>Set Display</b>	Contains outbound dialled number and inbound Caller ID. Other details may be captured depending on telephone technology and the model of the attached recorder device.
<b>Comments</b>	During a call, comments can be added in real-time via the comments filed in the Telephone Status Panel. After the call is completed, comments can be added to the call record by using the Comments command in the Toolbar or by right-clicking a call record and choosing Comments.
<b>Type</b>	Type of call: Outgoing, Incoming, or Missed Call. Note: The type of call is based on the ring cadence detected at the telephone. For systems where the telephone does not ring, or only provides a single alerting tone on an inbound call, some calls may be incorrectly flagged as "outbound".
<b>User</b>	The name of the User for which the call was recorded.
<b>Protect</b>	The status of the Protect flag. If protected, the record will indicate 'YES'.
<b>Locked By</b>	Indicates whether the call record is locked and, if so, by what user.
<b>Call Record File</b>	The file name of the call record file.
<b>Format</b>	The type of call record file. The default is .wma (Windows Media file).

## Call Finder



Call Finder is a powerful search utility that allows for easy retrieval of calls in the database. Call Finder displays all calls in the database that meet the specified search criteria. All matches will be displayed - there is no limit to the number of records that can be listed.

For example, if no criteria are selected, executing the search will display all call records in the database at the time that the search is started (this differs from the Station View which normally lists only a limited number of the most recent calls, but updates as new calls are created).

A number of search parameters are accepted to perform a search as defined below:

### Searching Station

Allows Station specific or global searches. Stations not included on the User's allowed Station list will not be accessible from the Call Finder.

### Date

The calls searched will be limited to the interval between the dates specified in the Calls From and Calls To fields. Default value interval is all calls recorded since installation

### Comments

Allows search based on user-entered comments. Any portion of the call record comment matching the search parameter will return a positive match.

### Set display

Allows search based on set display information (Caller ID and dialled number).

For example, searching by area code can quickly return all calls from a particular region.

Searching a complete phone number will return all call records with that number appearing in inbound (Caller ID), or outbound (dialled on telephone)

### Length of call

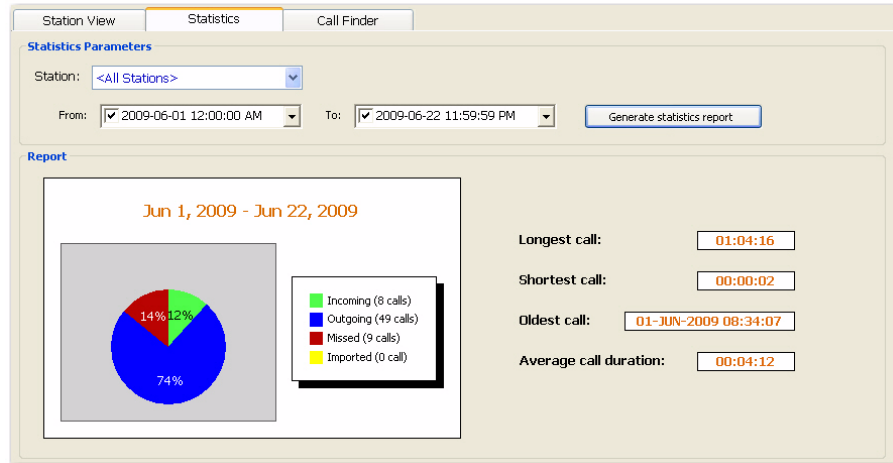
Searches can be based on call durations. Common uses are to screen out short calls or search for abnormally long calls

**User** Allows limiting of search to all made by a specific User. Note that the User must be logged in as an Operator while taking calls to have User information appended to the record

**Call type** Allows limiting of search to Incoming, Outgoing, or Missed Calls.

---

## Statistics



ECR keeps track of telephone usage and can provide interesting and useful statistical information. Depending on what privileges a user is granted, data can be calculated based on all Stations, specific Stations, or the current station. Data can also be limited based on a range of dates.

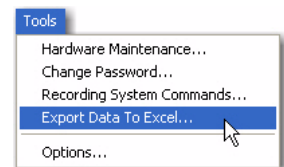
To access this information:

1. Click the Statistics tab, or select View>Call Statistics.
2. Select the desired Station setting.
3. Choose the desired From and To dates.
4. Click the Generate statistics report button.

Available statistical information includes:

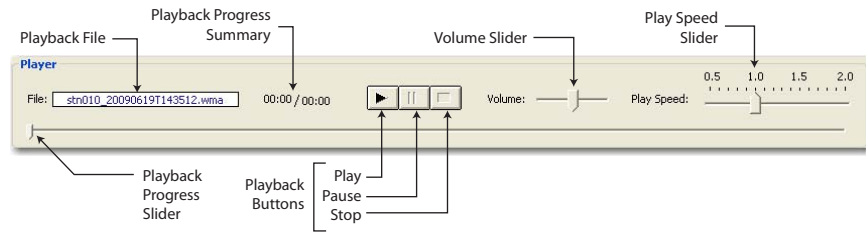
- Number of telephone calls made outbound
- Number of telephone call received
- Number of missed telephone calls
- Number of imported calls
- Longest, shortest, and oldest call, and
- Average call duration

Data appearing on screen can be exported to Microsoft Excel® using the Export to Excel feature found in the Tools menu.





## Player Panel



Use the Player Panel to control and monitor the playback of a selected call record. The Player Panel includes the following information and controls:

### **Playback File**

Provides the name of the currently selected call record file.

### **Playback Progress Slider**

Provides a visual timeline indication of the playback progress and also allows you to quickly jump ahead or back to sections of the call record file. To use the slider, left-click the slider, hold the mouse button down, then drag the slider to the portion of the call record you want to listen to. Alternatively, you can left-click anywhere on the timeline to make the playback jump forward or backward.

### **Playback Progress Summary**

Provides information of how long the current call record file is and how far along the the playback has progressed (in minutes and seconds).

### **Playback Buttons**

Use the basic Play, Pause, and Stop buttons to control the playback of the call record file.

### **Volume Slider**

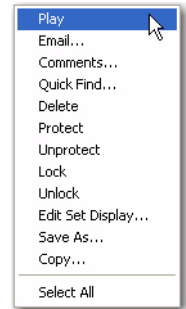
Drag the volume slider to control the playback volume of the call record file. If you are unable to generate enough volume, try adjusting your PC audio settings or turn up the volume controls on your speakers.

### **Play Speed Slider**

This control allows you adjust the speed of the playback of the call record file with minimal effect on the clarity of the content. A slow speed is useful if you have to type out a written record of a file and want to ensure the conversation is slow enough for you to keep up. A faster speed allows you to quickly scan through a file to find a particular piece of information.

## Call Record Context Functions

Call Record context functions are available for use when a call record is highlighted in either the Station View or Call Finder. The complete list of call record functions is available by right-clicking on a call record. A subset of these functions is also available from the Toolbar. In addition, when a call record is highlighted, the Play function can be accessed from the Player Panel at the bottom of the screen.



Note that unless a call record is highlighted, all toolbar icons will be greyed out.

Note also that not all Call Record context functions may be available to all users. This is because the privilege to use these functions is set by the ECR System Administrator. Contact your system administrator if you do not have the privileges to use any of the following functions.



### Play

Plays back a call record file. For full playback control of call records, refer to "Player Panel" on page 9 .



### Email

Call records may be easily emailed as attachments by simply highlighting one or more call records and choosing the Email function. A new email composition window will open (using your default email software) with the call record(s) pre-attached. In addition, the call detail and comments are inserted into the text body.

Note: In order to use this feature, a MAPI compliant email program must be installed. Microsoft® Outlook® and Outlook Express® are configured correctly by default, however Netscape® requires the MAPI option to be selected in the email program setup. Email signature attachment is only supported with Microsoft Outlook.

Standard Windows controls work in the Call List window to select multiple call records - for example, holding the CTRL key while clicking the selected call records you wish to email.

ECR will also include an “Algo Recorded” line of text in the email message. This text line may be deleted manually and set to not be displayed by unchecking the Display Recorded message checkbox in Tools>Options>User Display Settings.

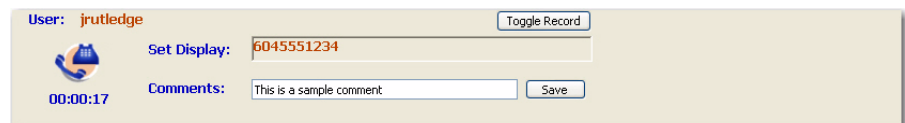
Any of the automatically inserted text may, of course, be edited or deleted if you do not wish to share this information with your recipient. Keep in mind that this information is also embedded in the audio file (e.g. comment text), but will not be retrieved by Windows Media Player.



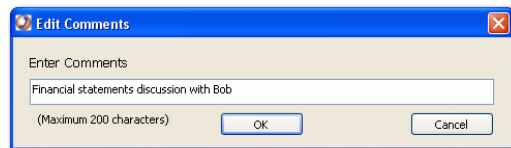
## Comments

Adding comments to a call record not only helps summarize the contents of a call but also makes search and retrieval much easier at a later date.

Anytime while recording a call, comments (up to 200 characters) can be typed into the Comments bar in the Current Call section of the Station View.



Once a call is saved, comments may be added or edited by selecting the Comments function. You can then add or edit text in the Comment text box.

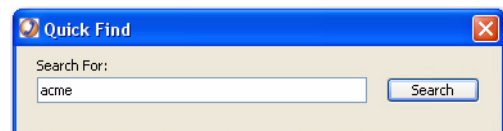


Comments are embedded into call records, just like Caller ID and other data, to be retrieved by Client Call Recorder.



## Quick Find

The Quick Find function allows you to quickly search all the fields in the displayed call list in the current view window (can be Station View or Call Finder Views). The



function highlights any call records in the current view window, from ANY field, that match the text entered in the Quick Find search box. Note that for full search capabilities on all calls in the local ECR database, use the Call Finder function.



## Delete

The Delete function allows you to delete one or more call records that have been selected in the Call List window. Note that the delete key on the keyboard will perform the same function. Note also that the Delete function will not delete protected records. To delete a protected record, first unprotect the record, then delete it.



## Protect

Allows you to protect a call record so that it cannot be deleted (manually or automatically) within the ECR system. This feature ensures that a call record will remain in the ECR database even if the Automatic Delete function is set.

In addition, protected call records will not be counted as part of the Number of Calls limit set for the Automatic Delete function (if used). For example, if you have set the Number of Calls limit to 20 calls and have protected two calls, you will store the two protected calls plus the 20 most recent calls.

To protect a call record, select the record then choose the Protect function. To manually delete a protected call record, first unprotect it, then delete it.



## Unprotect

Disables the Protect feature.



## Lock

Prevents the call record from being played, emailed or viewed by other Operators.

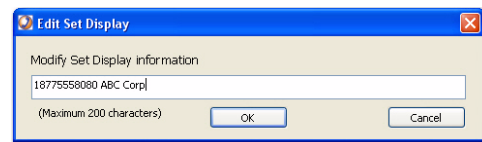


## Unlock

Disables the Lock feature.

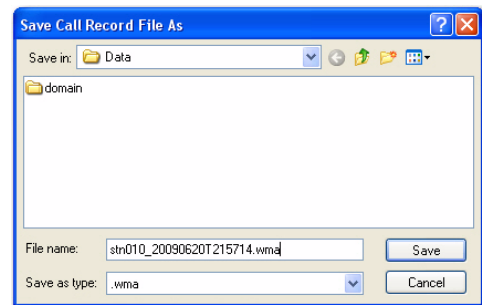
## Edit Set Display

Allows you to edit the automatically-generated text in a call record's set display field, up to a maximum of 200 characters.



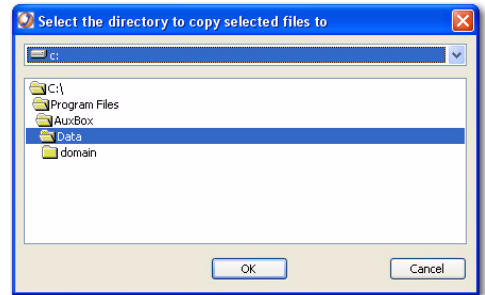
## Save As

Allows you to save a call record under a different name or to a different location on your computer or storage media.



## Copy

Allows you to copy selected call records to a different directory on your computer or storage media. To use this function, first select the call records of interest from the Station View or Call Finder views, choose Copy, then select the target folder to copy to.

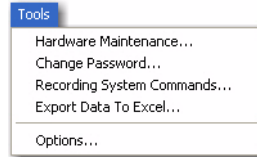


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## Select All

Selects all the call records in the currently displayed call list.

# 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.

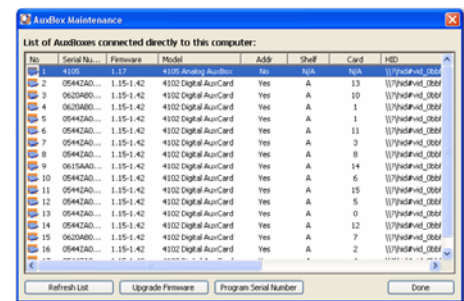
Note that before accessing these devices, the recording system will need to be temporarily shut down.

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

This function allows you to start, shut down, or restart any call recording hardware you may have attached to your PC. **Use these commands with caution as critical call recording can be disrupted.**



---

## Export Data to Excel

This function will export all data displayed in the view window to Microsoft Excel. This function is available from all three main views of the ECR Station Viewer (Station View, Statistics, and Call Finder).

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## Change password

Allows the currently logged in User a quick means to change their password.



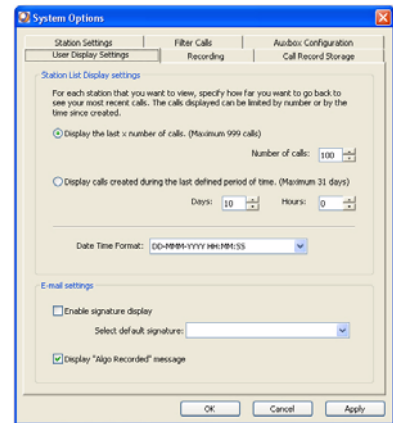


# Options

## User Display Settings

This tab includes options for controlling how many recent calls will be displayed in the Station View's Call History List of call records. In addition, this tab allows you to set the format of the date display of call records and to control the automatically-inserted text that goes into generated emails.

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:

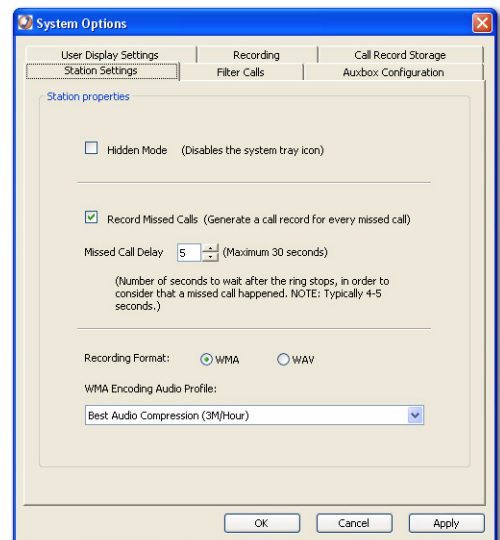
- Number of calls (up to 999)
- Period of time (up to 30 days for the 'Days' drop-down box, and up to 24 hours for the 'Hours' drop-down box)
- The Enable Signature Display setting allows you to automatically include Email signature text (from your email client) into any emails sent from ECR.
- Unchecking the default "Algo Recorded" message setting allows you to remove the automatically inserted message text (e.g. "This call was recorded using an Algo 4105 Analog Auxbox with the Enterprise Call Recorder V2.2 software") displayed in the emails.

### Email Settings

## Station Settings

The Station Settings tab allows users 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 the station.

### Record Missed Calls

You can choose to have ECR log missed calls or not for the 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.

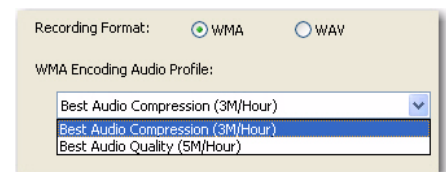
▶ *Note that logging missed calls should be disabled when a single inbound call rings multiple telephones, as in hunt groups, to avoid large scale generation of missed call records*

### 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.

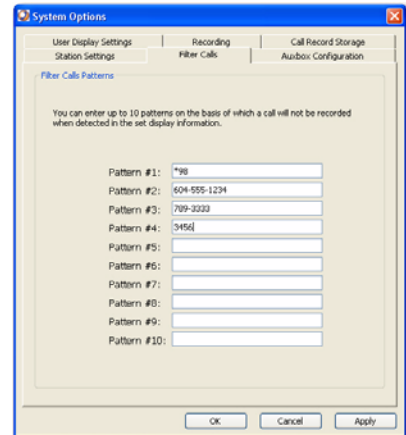


The WMA recording compression can be set to either 3MB or 5MB per hour. The 5MB per hour setting offers improved audio quality at the expense of increased storage usage.

---

## Filter Calls

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.

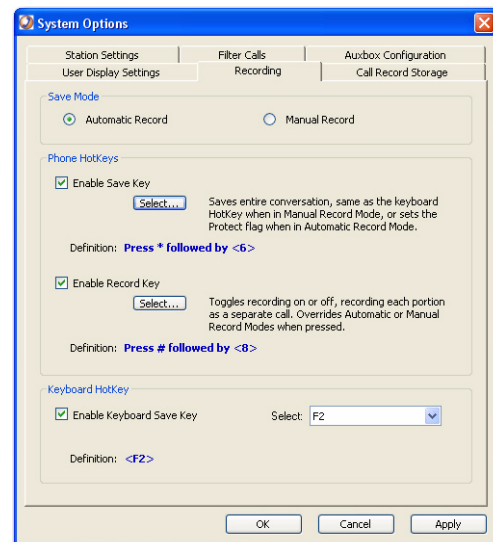
This function works by searching for the pattern in the set display. Thus, you can enter partial text or numbers instead of exact phone numbers or names. If there is a match, the call record is not saved.

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.

## Recording

The Recording tab allows users 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
- Missed calls if the Record Missed Calls function is turned off .

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.

## AuxBox Configuration

The AuxBox Configuration 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.

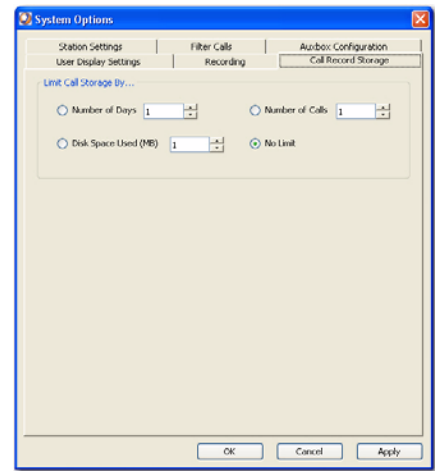
### Select Speech Decoding

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.

## Call Record Storage

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.



### 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.



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