



## Convergent Call Recording Software

### Introduction

This document describes the installation procedures for the Convergent Call Manager software when used with the Digital 01 hardware or with the XTR BackOffice Call Recording and Storage solution.

The Xtension Recorder Call Manager is a software-only solution that provides easy access to calls stored on a server. It is designed to speed the process of searching multiple folders for specific calls and to manage the archive as needed.

### Installation Requirements

#### PC Requirements

Minimum Specifications (for player software only):

P2 400  
128 Meg RAM  
Win 98, ME, 2000 or XP

Note:

If used in conjunction with the BackOffice software, it is recommended that the Call Manger Software be loaded onto the same PC used for storage. Please refer to the BackOffice Install Guide for minimum specs.



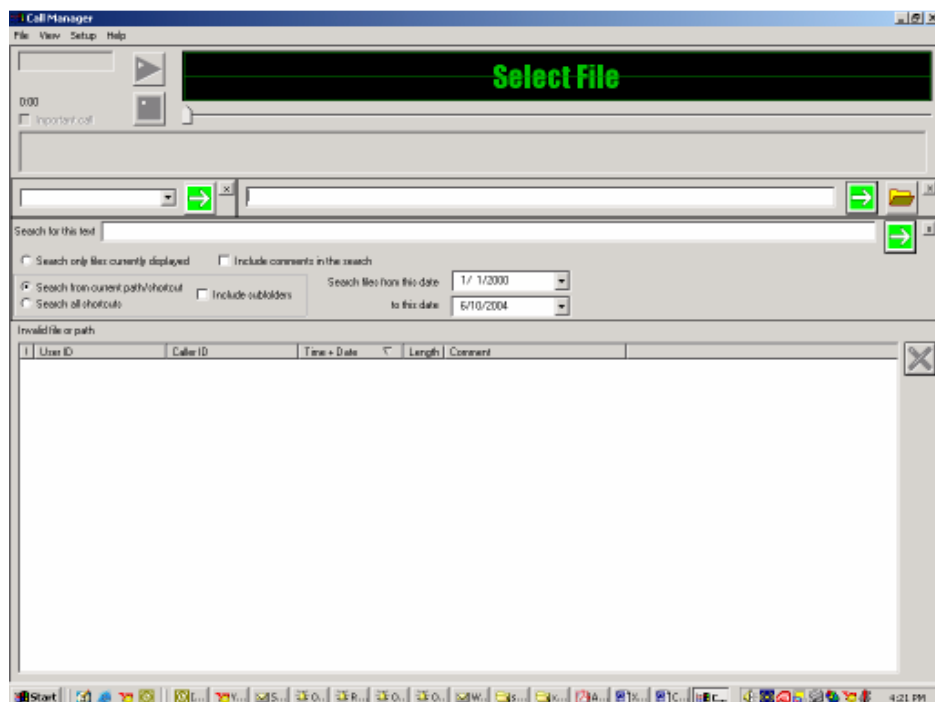
## Installation of the Call Manager Software

**Note: the recommended installation procedure varies depending on how you are archiving calls. If calls are stored on a central storage server then it is recommended that you install the Call Manager.exe on your server ONLY. Individual users can be provided with a desktop shortcut to the EXE file on the server. The advantage of this is that you will only have a single shortcuts file to maintain (on the server), and it will be accessible to ALL the call manager users in the company.**

**For security, place the Call Manager EXE file into it's own folder, and share it read-only. That will prevent your users from inadvertently editing the shortcuts.**

**If it is desired for individual managers to access only specific users, then multiple copies of Call Manager can be loaded into either the various directories OR on the supervisor's PC.**

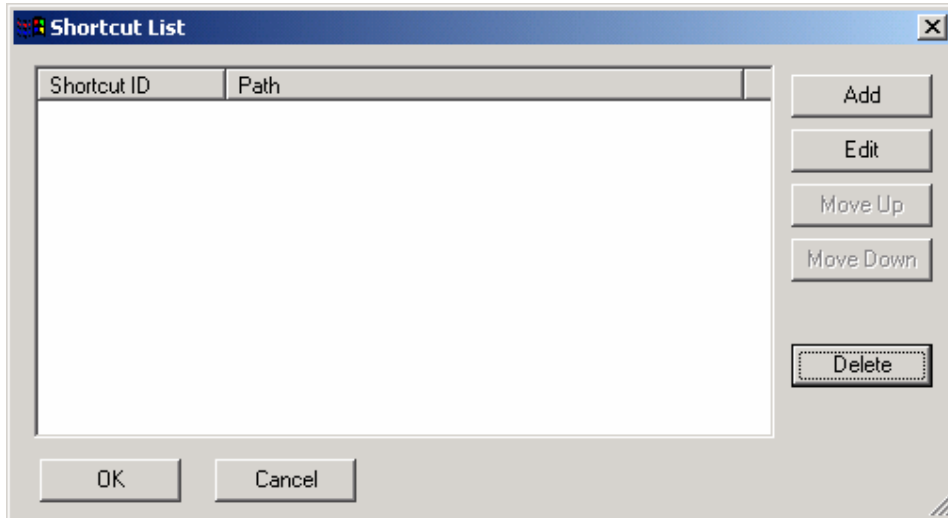
- 1) Insert the provided Call Manager CD into the CD Bay of the PC.
- 2) Browse to the folder labelled Call Manager
- 3) Run the Setup.EXE program, and install the program as desired on the PC
- 4) You will then see the following screen:



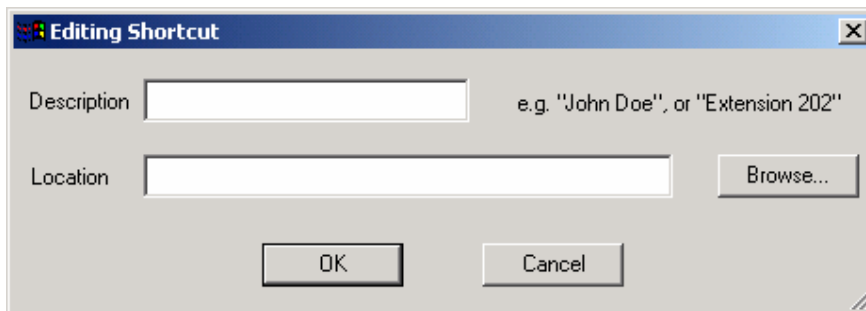


### Setting Up Shortcuts

Click on the Setup Option from the Main Screen, and then select Shortcuts, the following window will appear:



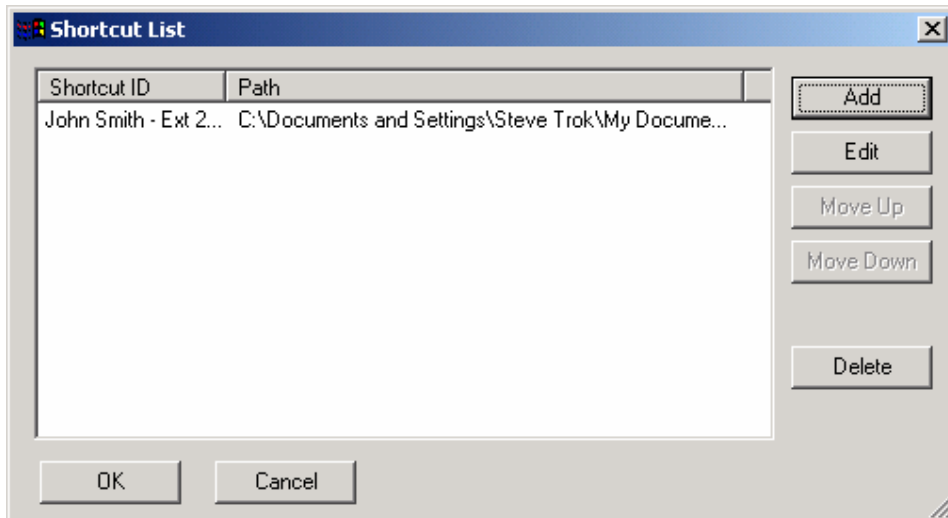
Next select Add:



Under Description, name the shortcut, i.e. User name and their Extension Number, then browse to the storage folder location where their calls are being stored. ***It is recommended that you first set up the Xtension Recorder software, storage folders etc. prior to installing the Call Manager software, this will prevent you from having to create the folders in this step and then redirect the individual devices or ports to the appropriate folder.***



As you add shortcuts you will see them appear as below:



### **Tips on Shortcuts**

***When entering shortcuts, always enter them as the full network location. E.g. \\server\calls\, rather than C:\calls\... even if you are entering them on the local machine. Then, when you want to install on another PC, you can copy the shortcuts.ini file, rather than having to enter all the shortcuts again***

***In addition to the above, (as stated earlier) install Call Manager.exe and the shortcuts.ini file on your server ONLY. On each client machine, browse to the Call manger folder on the server, and run the "netsetup" program. The advantage of this is that you will only have a single shortcuts file to maintain (on the server), and it will be accessible to ALL the call manager users in the company. For security, place the Call Manager EXE and INI files into their own folder, and share it read-only. That will prevent your users from inadvertently editing the shortcuts.***

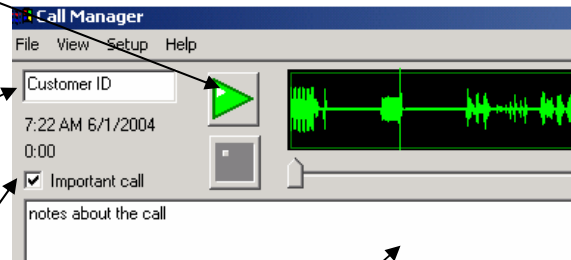
***Note: Any number of shortcuts can be added. They will appear in the order entered so keep this in mind when selecting the order of entry. The order can be manually edited using the "Move up" and "Move Down" buttons.***



## Using Call Manger

### **Playback**

Select the shortcut or main storage location then select the call to be played back and press the green Play arrow. You can drag to any location in the recording and stop or pause.



### **Caller ID/Number Dialed Field**

You can add or edit the CallerID box. This serves as another search option for archived calls. If caller ID is supported by your system and your version of the Xtension Recorder Software it CallerID and or Number Dialed information will be displayed in this box. This can be edited or in the case where the information is not provided, the user upon playback can enter and number or text into this field for future reference.

### **Important Call**

Use this tick box to sort and highlight calls of an important nature. It will also prevent any auto-delete utility in the Desktop Player software from deleting this call.

### **Notes Field**

As calls are played back you can add notes about the call. These notes will be used in the future to search for the archived call.

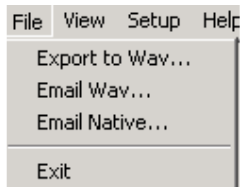
### **View**

This function allows you to choose what information you prefer to view from the main interface.



## **File**

Export options are available from the File menu:



**Export to Wav** - will allow you to simply and easily save the selected file as a Wav file.

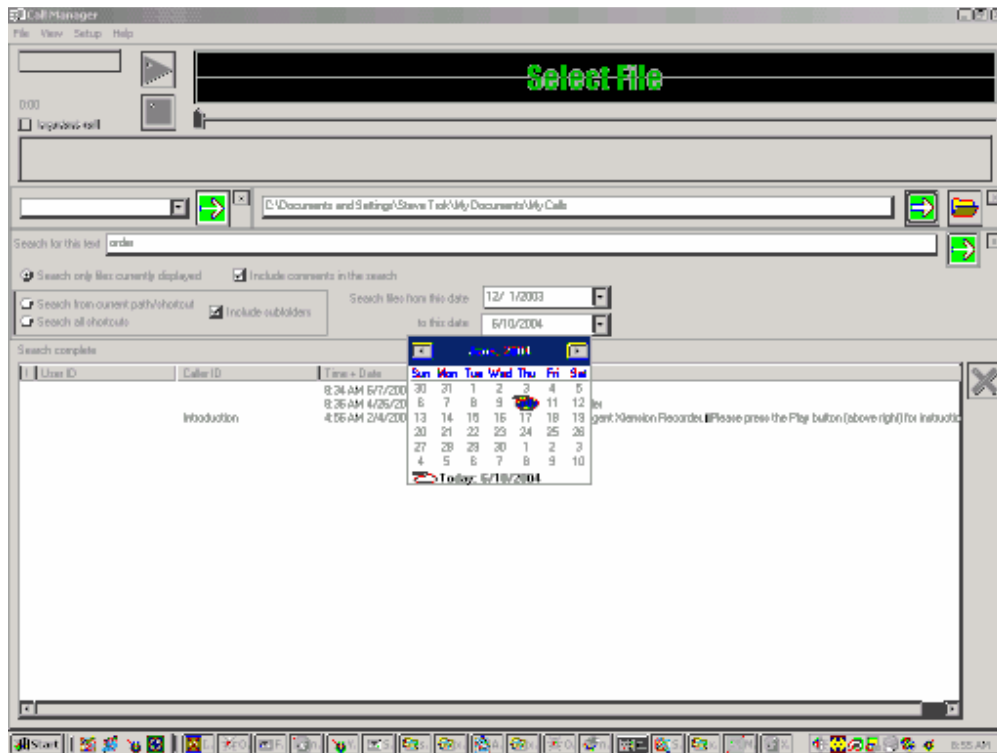
**Email Wav** – attaches the select file as a wav file to your MAPI enabled Email Program (such as Outlook). It will also include the Date and Time of the Call as well as Notes about the call and Caller ID if provided.

**Email Native** – this option provides the same e-mail function, but attaches the file as a compressed .xtr file. This keeps all the entered comments and callerID embedded in the file. The remote user can download a player from [www.usbcallrecord.com](http://www.usbcallrecord.com).



### Search Functions:

Select View, then Search, this will display the search function options as displayed below.



You can search for calls by CallerID, number dialled (if provided) or by notes taken about the call during prior playback. Calls can be searched within all folders or only specific folders and within specific date ranges.



### **Archiving Calls**

Calls are automatically saved to the mapped location. If it is desired to archive calls longer than 30 days, it is highly recommended that the user remove the calls to external media, i.e. CD or DVD backup.

Use any CD burning software to accomplish this task. When writing to the CDs be sure to create 'data' CDs NOT 'audio or music'. You can also copy the Player software directly onto the CD. With the player software loaded onto the CD, anyone will be able to playback the recordings on the CD by simply inserting the CD into their CD bay and selecting the Player.exe file on the CD.

All calls on the CD will then be available for playback and future reference.