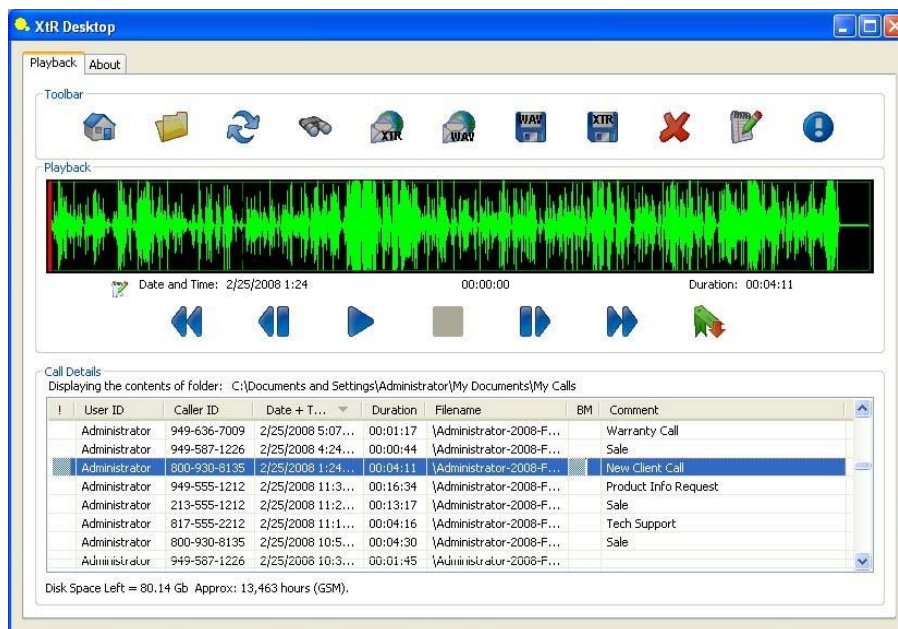


Xtension Recorder Universal Adapter 3.0 Installation and User Guide



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Introduction

This document describes the features and capabilities of the Universal Adapter 3.0 hardware and XTR Desktop software solution.

The Universal Adapter 3.0 solution consists of a USB device that taps an analog telephone line or the handset of telephone allowing digital recording of your telephone conversations onto your PC. Using the Desktop Software the Universal Adapter 3.0 provides a professional recording solution for one user or hundreds.

PC Compatibility

The Xtension Recorder application supports Microsoft operating systems that support USB devices. The list of existing operating systems which meet this requirement are:

- WIN XP
- Windows Vista
- Windows 7
- Windows 8
- Windows 10

Important Note – Xtension Recorder is not supported on MAC operating systems.

Installing the Universal Adapter 3.0v2

Step 1 – Choose the Connection type and make the physical connections to the Universal Adapter 3.0.

The Universal Adapter supports two types of connection to deliver the best performance according to the type of telephone you want to connect:

- **Line Connection**– records your conversations from the telephone line.
- **Handset Connection**– records your conversations from the telephone handset cord.

It is important that you understand the difference between the two types of connections and make the appropriate selection in order to record your calls.

Line Connection

Select Line Connection if:

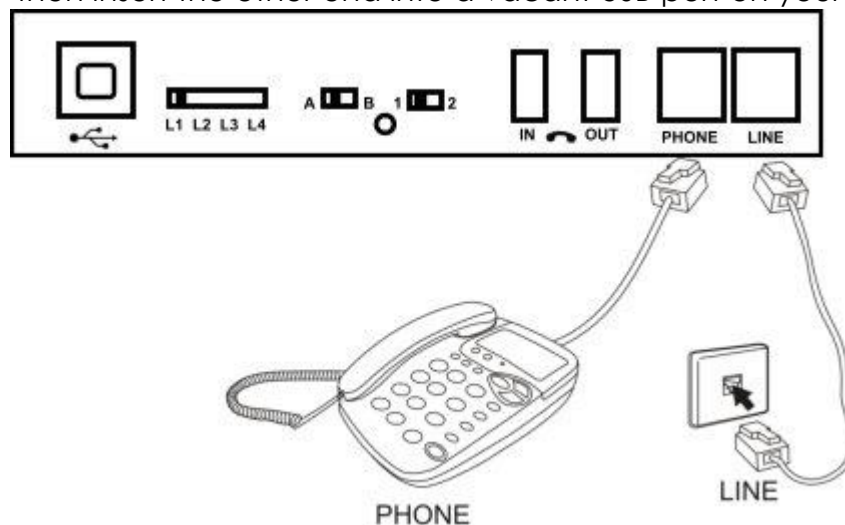
- You have an analog phone (Line Connection will not work for digital PBX telephones) **and**
- You want to record parallel connected extensions (other extensions on the same line such as other phones on your home line) **and**
- You want to collect Caller ID and Digits Dialed (CID only if provide by your telecom line provider)

Handset Connection

- If you have a Digital or IP PBX telephone, you must use the Handset Connection. Some features available in Line Connection are not available (Caller ID, Digits Dialed, Parallel Recording) because they require connection to an analog telephone line. Digital PBX systems use digital signals for Caller ID and Dialed Digits. If you need to log Caller ID and Dialed Digits on a Digital PBX telephone, we offer a series of digital recorders available. Please visit www.USBCallRecord.com for details.

Installation – Line Connection

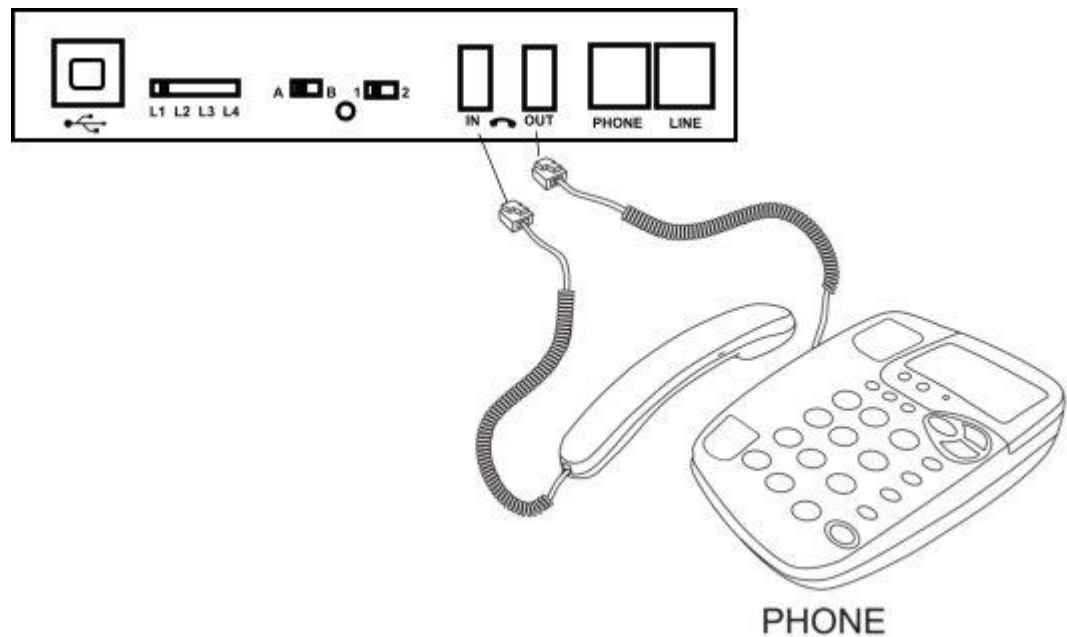
- Remove the telephone line connection from the base of your telephone
- Plug the line connection in the socket labelled “Line” on the back of the Universal Adapter 3.0
- Plug the line cord provided into the socket labelled “Phone” and the other end into the telephone.
- Verify that the Slide Switch Selector is set to the L1 Position (far left)
- Connect the supplied USB cable to the Universal Adapter 3.0 and then insert the other end into a vacant USB port on your computer.



Installation – Handset Connection

To set up a handset connection to the Universal Adapter:

- Remove the handset modular connector (curly cord) from your telephone base and plug it into the “IN” port on the Universal Adapter 3.0.
- Plug the provided small handset line cord into the telephone base where the handset was previously plugged in and then into the “OUT” port on the Universal Adapter 3.0.
- Plug the removed handset connector into one of the handset sockets of the device (it doesn't matter which one you use).
- Verify that the Slide Switch Selector is set to the L1 Position (far left) • Set the Handset Type Switches on the back of the Universal Adapter 3.0 to the A and 1 positions.
- Connect the supplied USB cable to the Universal Adapter 3.0 and then insert the other end into a vacant USB port on your computer.
-

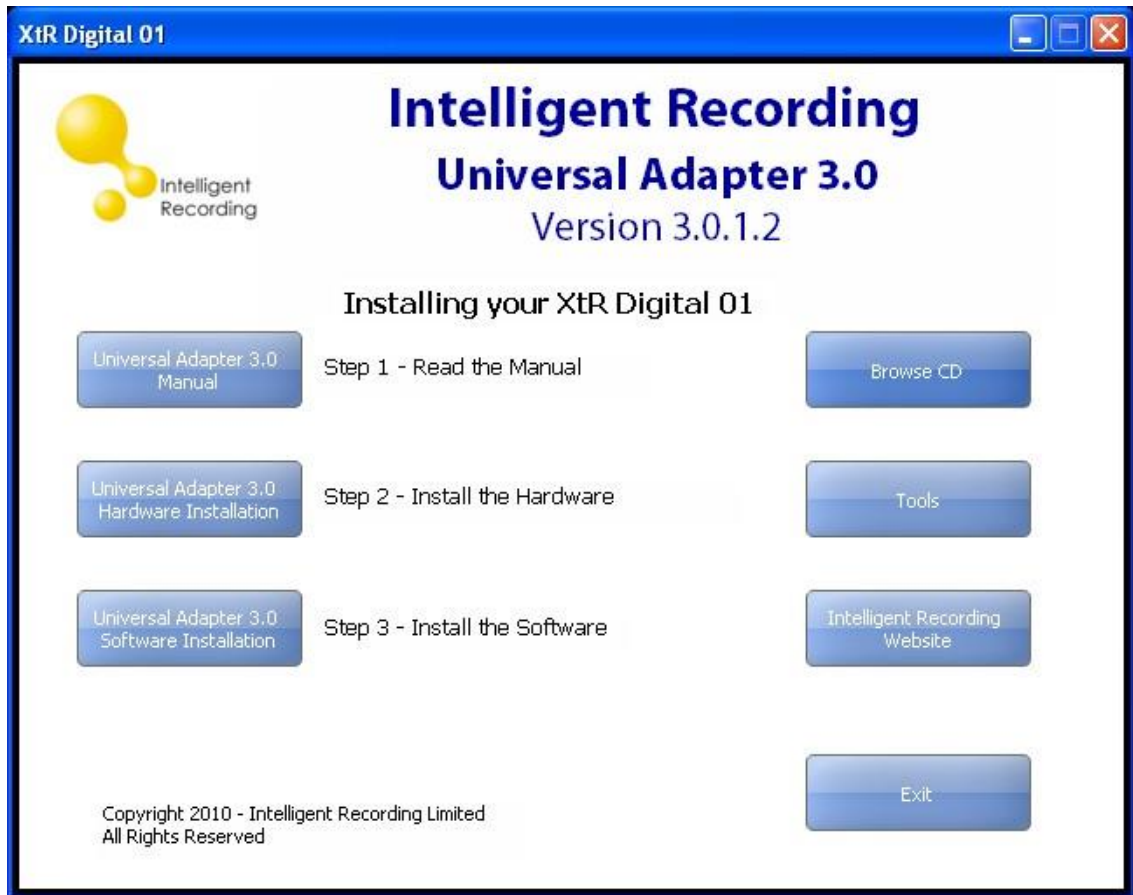


Step 2 – Install and Configure the Recorder and Player Software

Insert the CD that came with your Universal Adapter 3.0 into the CD drive of your PC. The CD will run an installation application

that will guide you through the software installation process. Follow the steps as outlined on your screen

- 1 – Read the manual (f you have not done so already)
- 2 – Install the Hardware (see above for hardware installation)
- 3 – Install and configure the software.

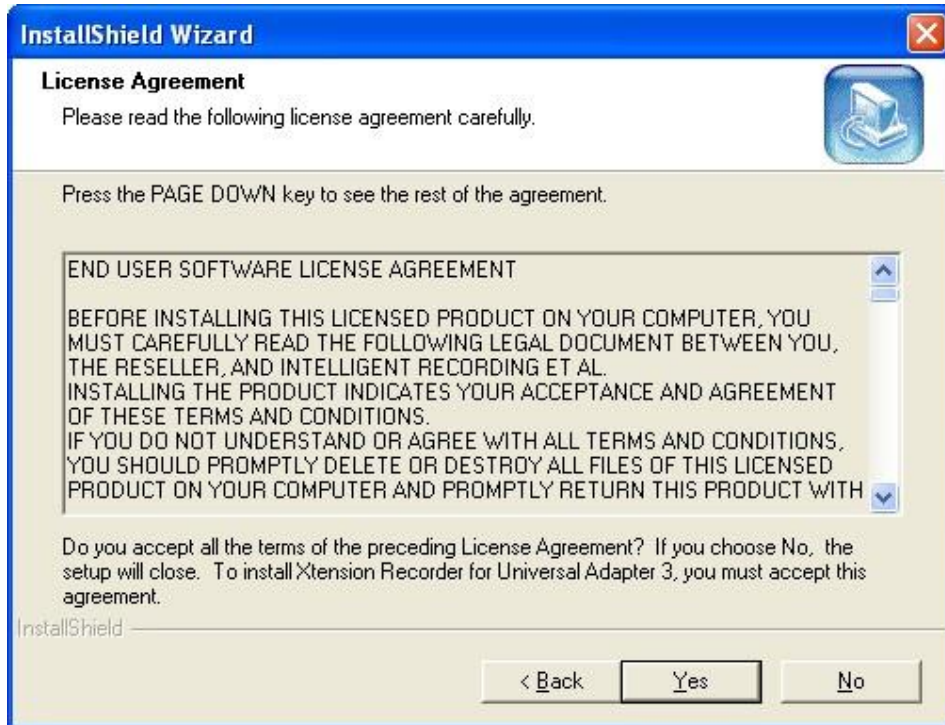




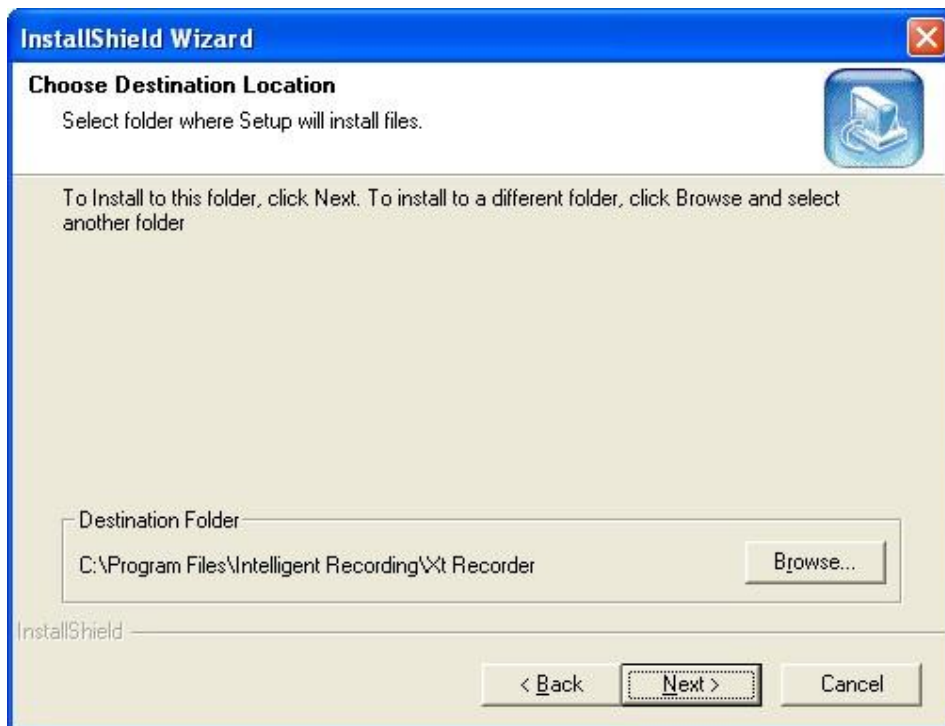
After clicking on Install the Software for your Universal Adapter 3.0 the following screen will appear. Select "Run".



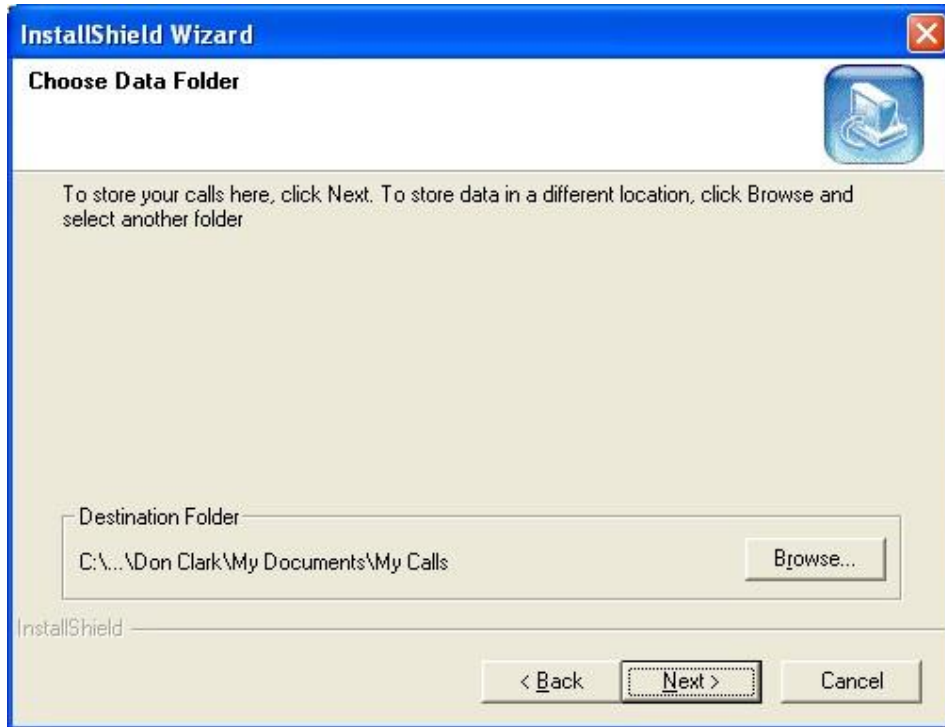
Select Next.



Select Yes to accept the license agreement and continue.



Select Next to accept the default destination location for installation (recommended).



Select Next to select the default Data folder (recommended).



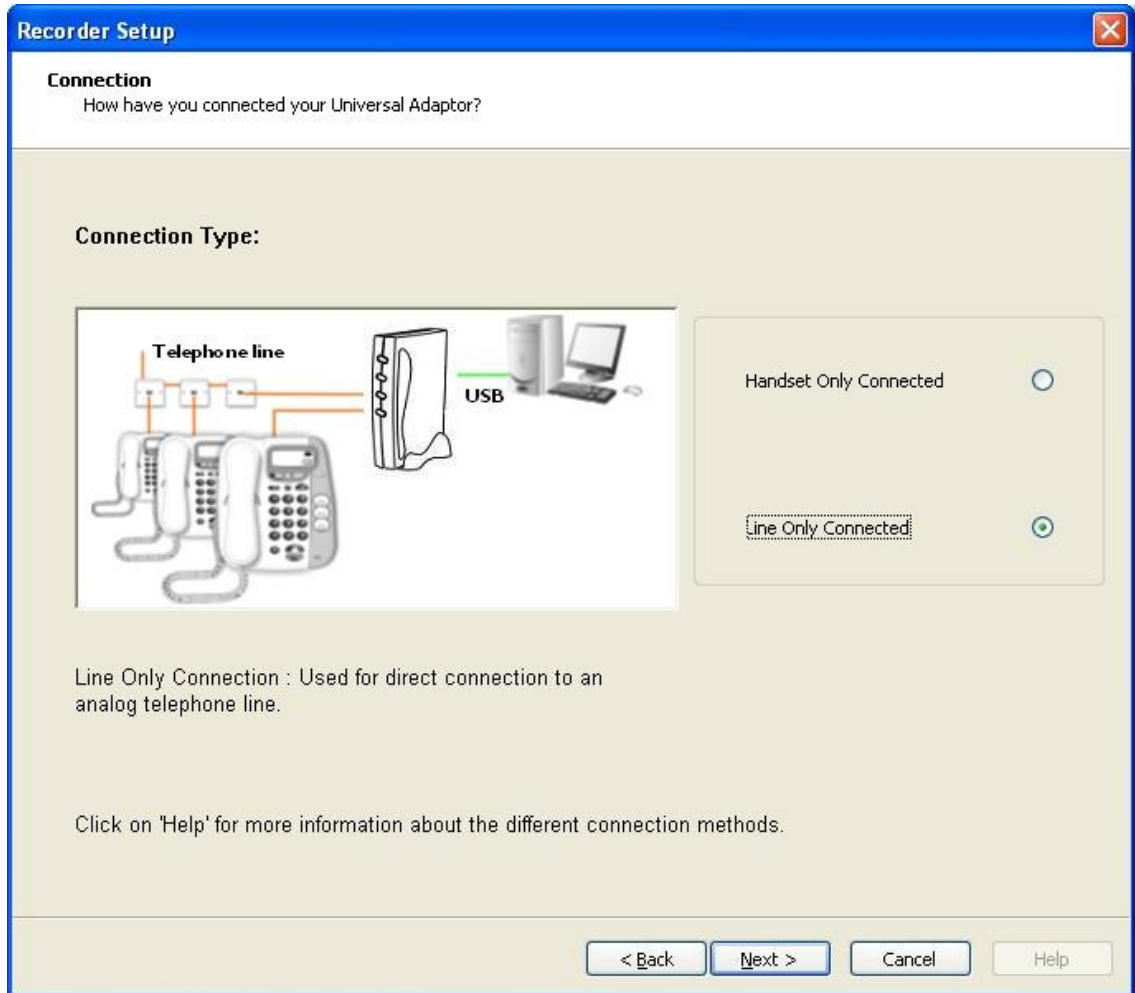
Select Finish to complete the software installation.

Configuring the Universal Adapter 3.0 with the Recorder Setup Wizard.

Once the software has been installed the Recorder Setup Wizard will launch and step you through the setup of your Universal Adapter 3.0.

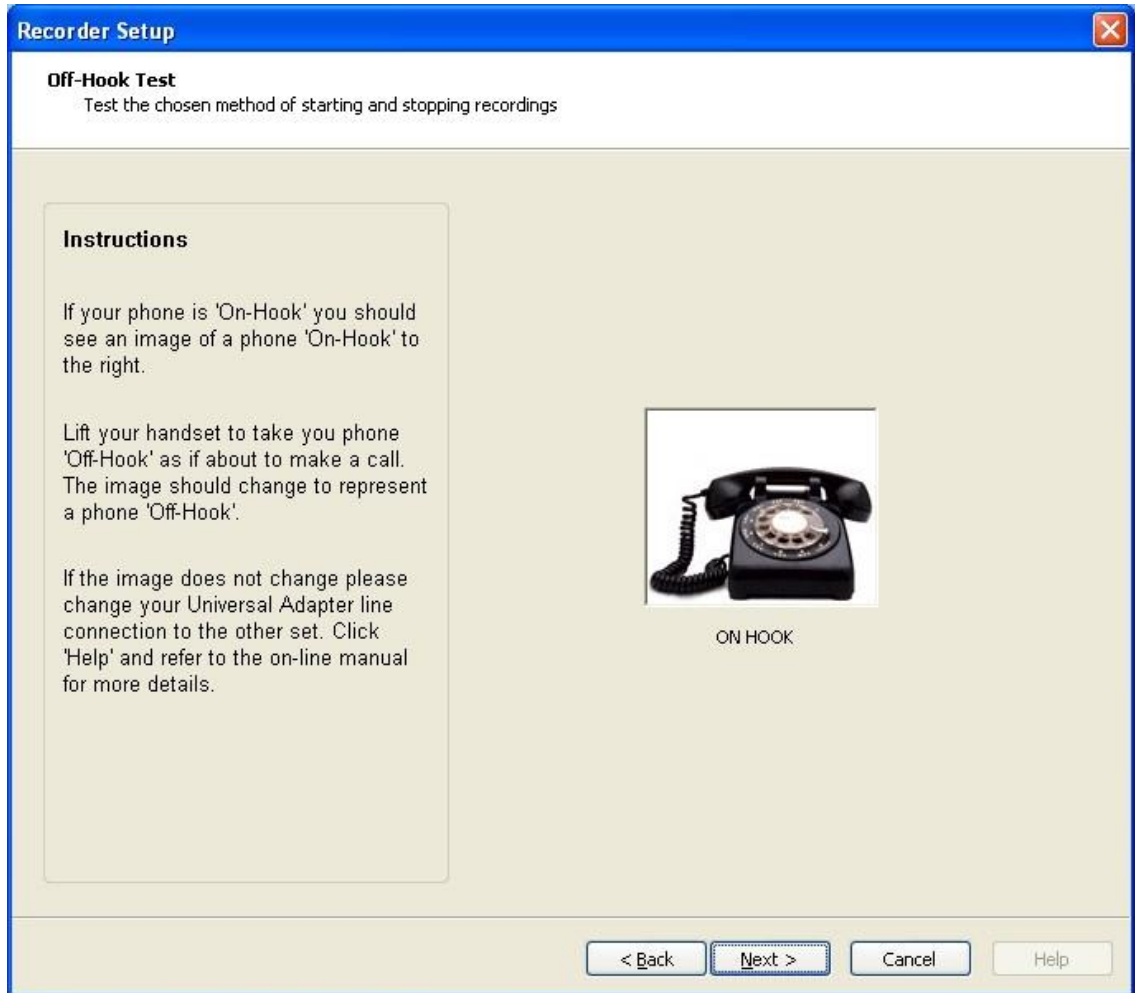


Select Next to Continue. If you are unsure of your administrative privileges click the "Save Test" button before continuing.

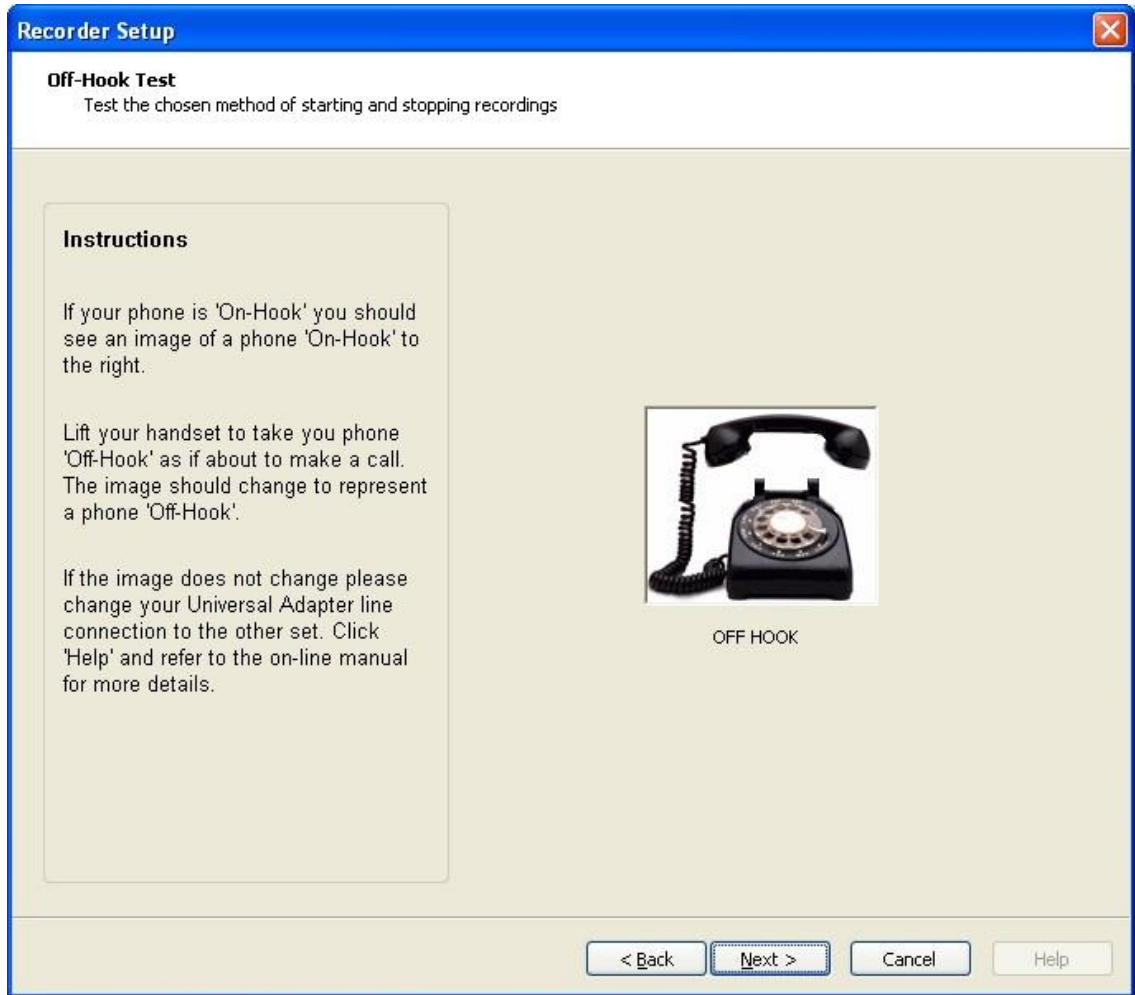


If the Universal Adapter 3.0 is being set up as Line Connected – select “Line Only Connected” as shown above and continue through the setup as below.

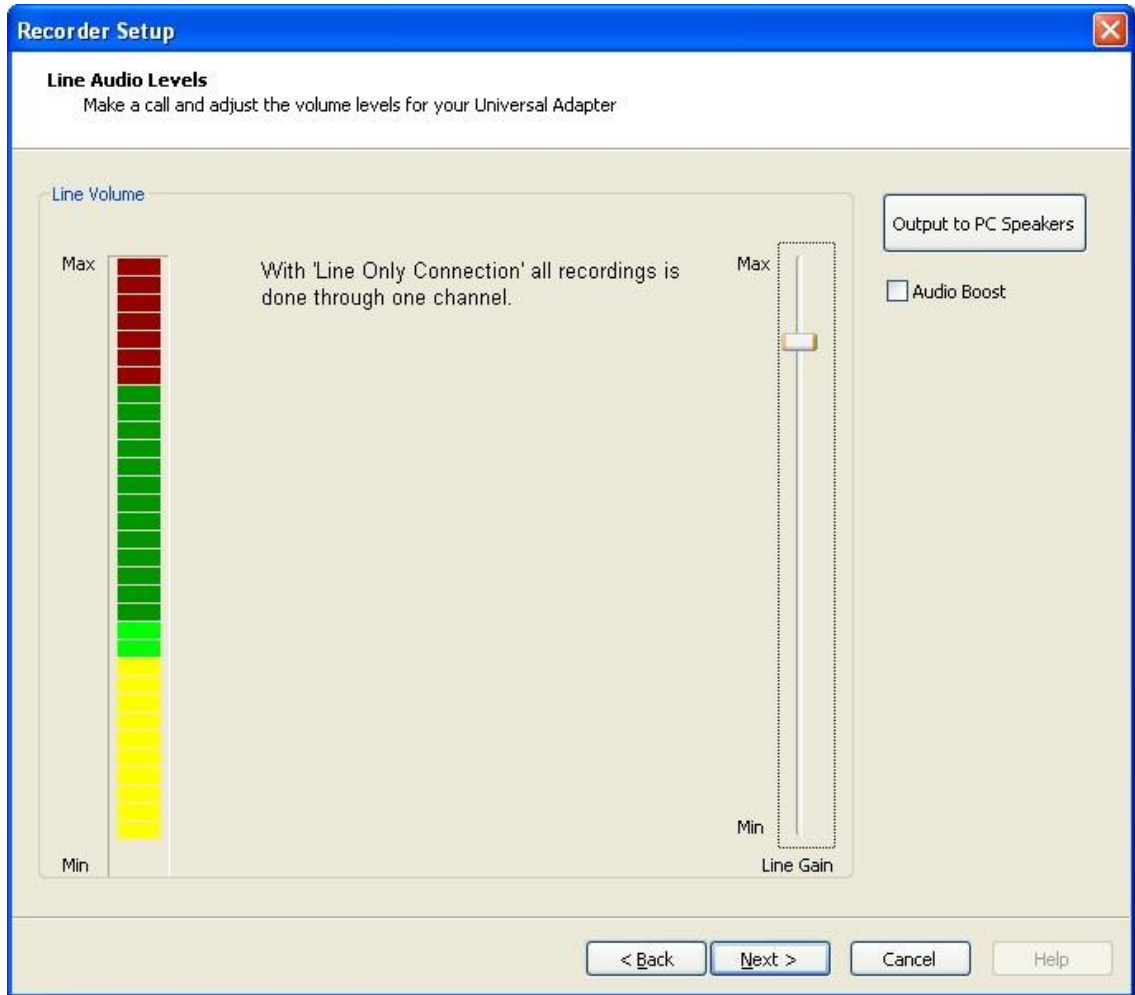
If you will be setting the Universal Adapter 3.0 up in Handset Mode – Select Handset Only Connected and go to the “Handset” wizard instructions at the end of this section.



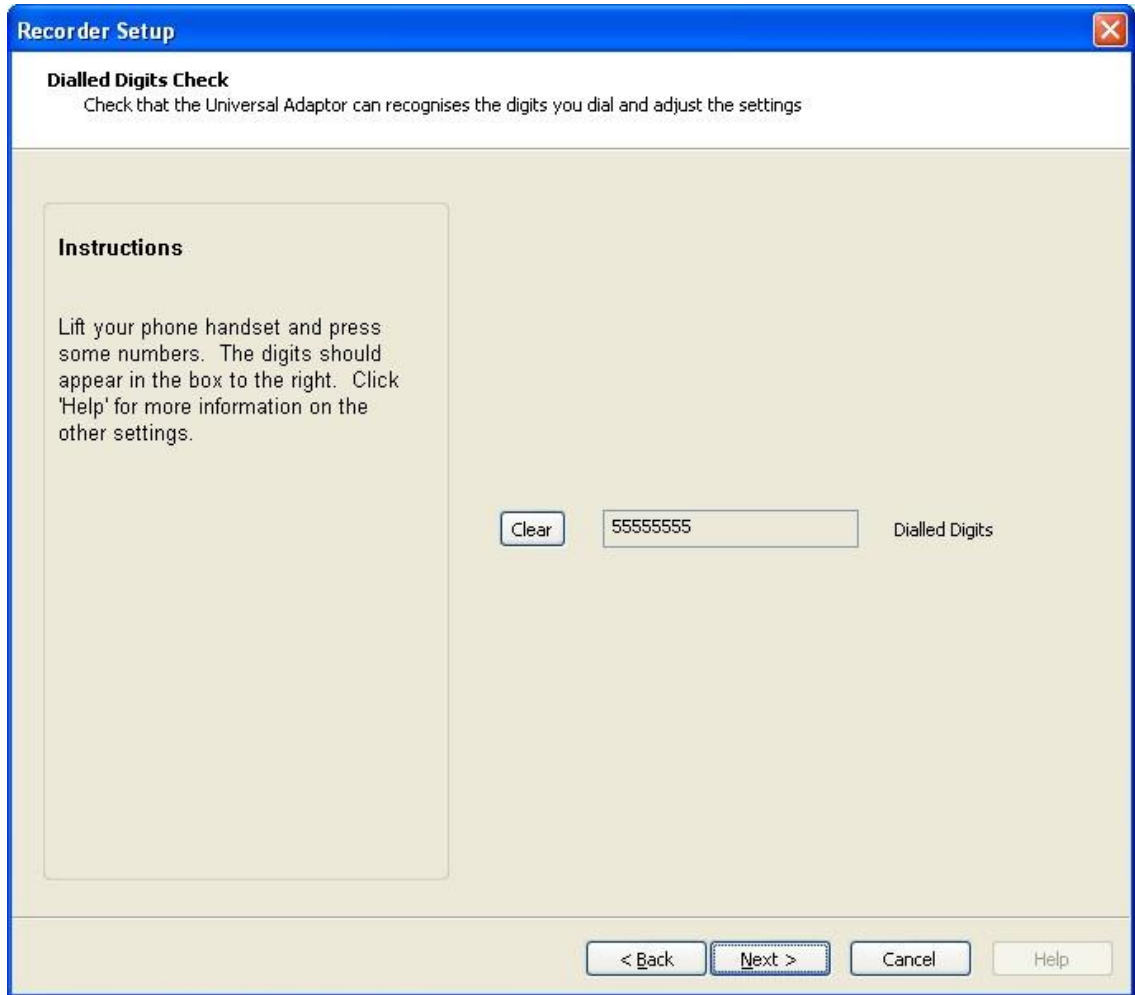
Lift the handset of your telephone – the picture of the telephone should change to “Off Hook” to verify the installation is correct (see Below).



Telephone in Line Mode in with Off Hook condition.



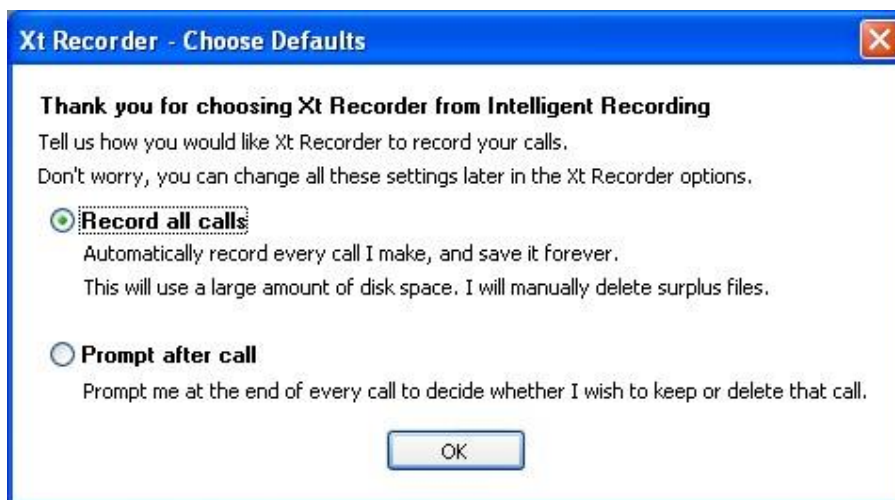
Click on "Output to PC Speakers" button and then use the slide bar to adjust the audio levels of your recorder. Normal conversation should be in the Green zone.



Lift your handset and press numbers on your dial pad to verify digits are being recognized.



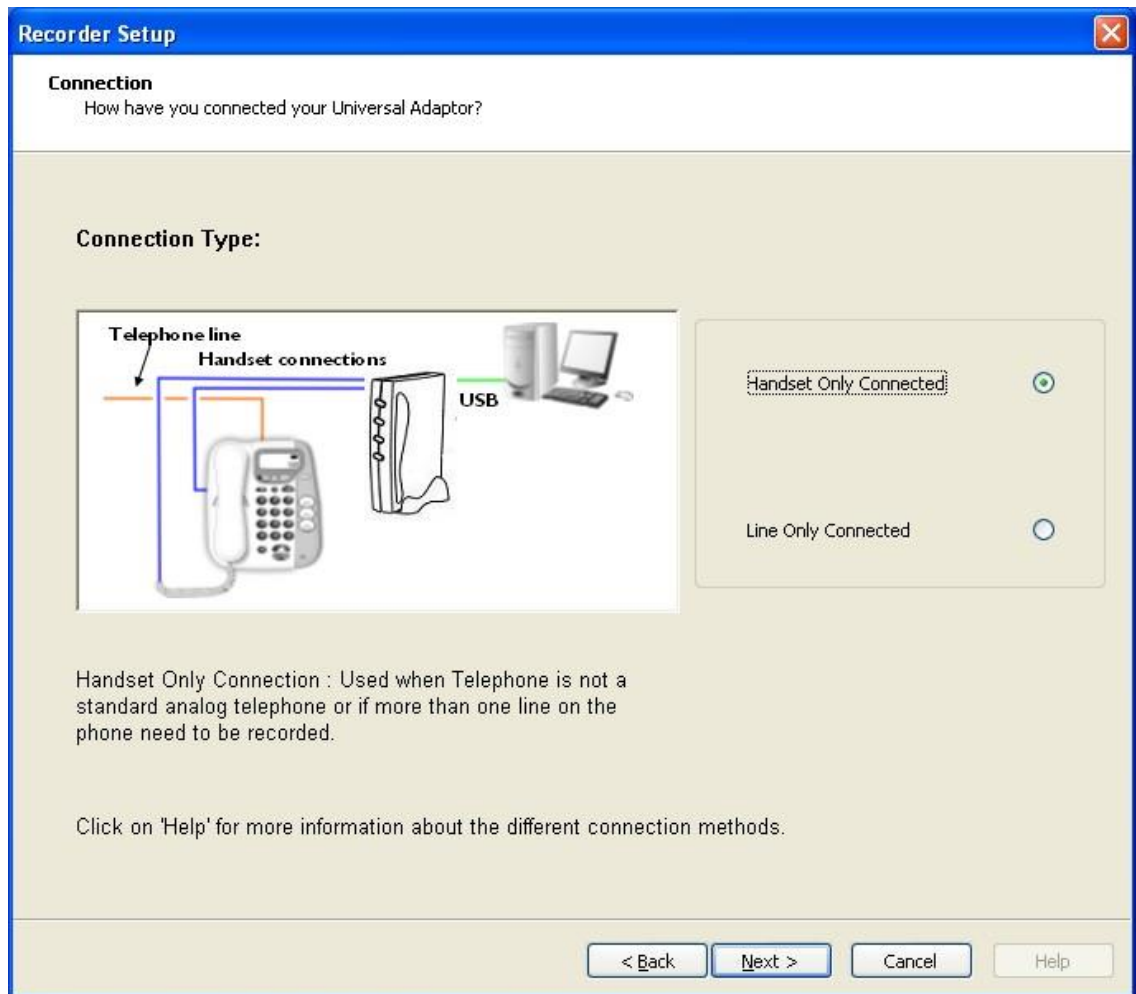
Your recorder is set up – click on Finish to start your recorder.



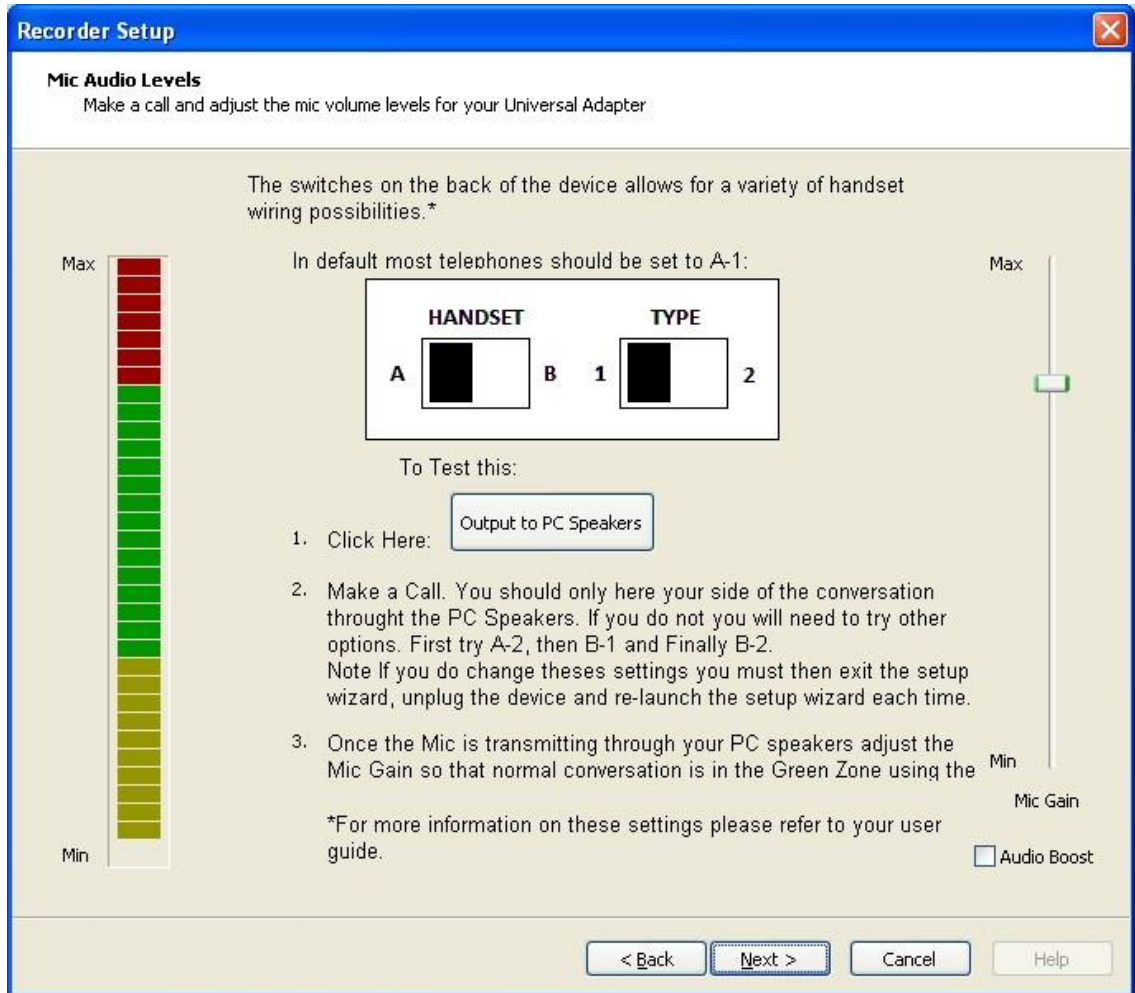
Select whether to automatically record calls and whether you want to use prompts.

Handset Setup Instructions

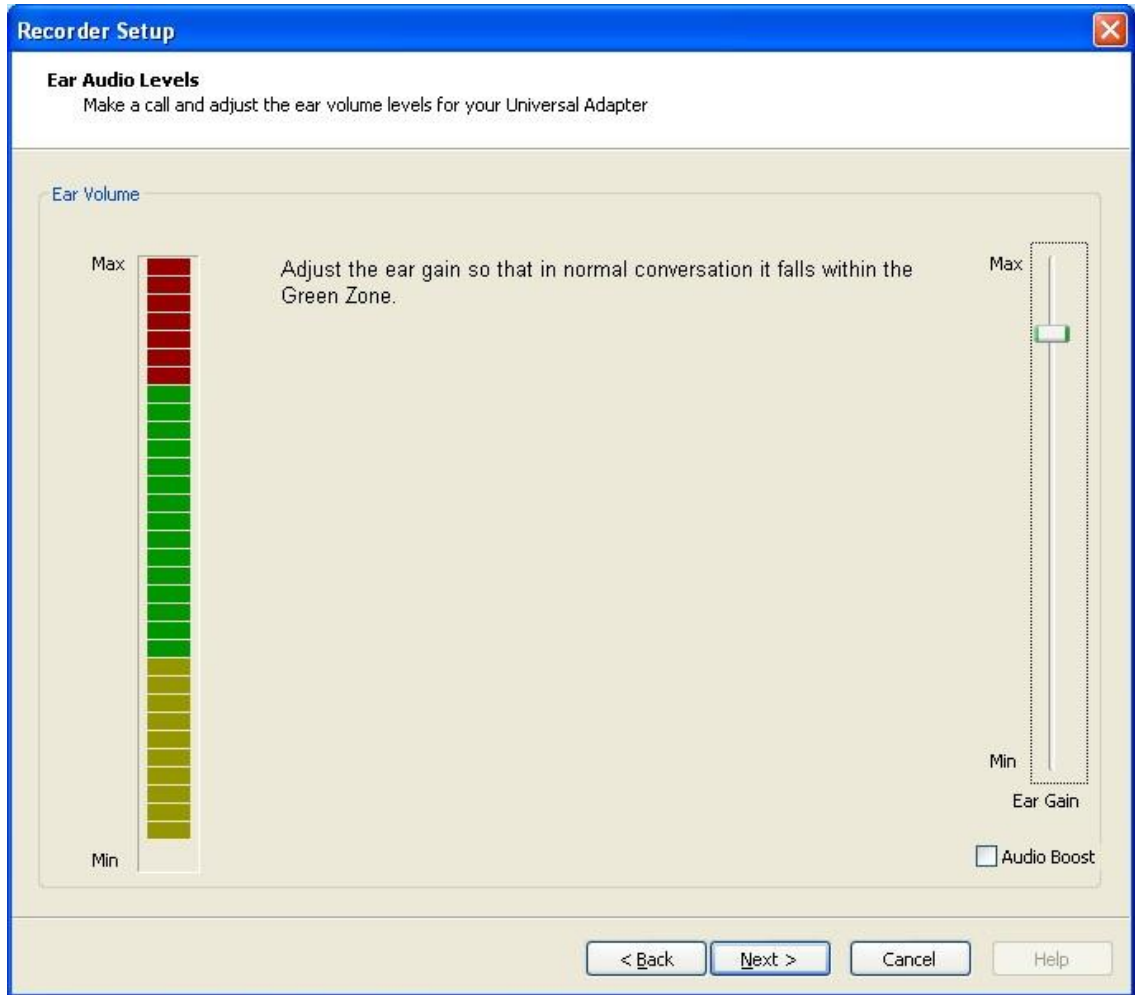
If you are setting the device up in Handset mode follow the steps below:



If you will be using Handset mode, select "Handset Only Connected" and click Next.



Click on the “Output to PC Speakers” button to adjust your volume settings. The default setting for Handset Type is A-1, if you do not hear audio through your PC speakers follow the onscreen directions to change your handset type with the A/B and 1/2 switches. Once these settings are correct use the slide bar to adjust the audio levels of your recorder. Normal conversation should be in the Green zone. Use the Audio Boost feature if the slide bar will not adjust to the green zone for normal conversation.



Use the slide bar so that normal conversation is in the green zone.


Recorder Setup [Close]

Voice Trigger Levels
Adjust the Voice Trigger Levels to start and stop call recording

Instructions

The Voice Trigger settings adjust how the Universal Adapter will start and stop call recording using the audio level.

Please click 'Help' for information about these settings and how to adjust them.

Output dB	<input type="text" value="0"/>	
Mic Start Threshold (0 to 79) dB	<input type="text" value="5"/> [Up] [Down]	
Ear Start Threshold (0 to 79) dB	<input type="text" value="5"/> [Up] [Down]	
Idle Threshold (0 to 79) dB	<input type="text" value="1"/> [Up] [Down]	IDLE DETECTED
Idle Timeout (1 to 20) seconds	<input type="text" value="8"/> [Up] [Down]	
Voice Trigger on Mouth	<input type="checkbox"/>	
Voice Trigger on EarPiece / Tel Line	<input checked="" type="checkbox"/>	
Recording State		NOT RECORDING

[< Back] [Next >] [Cancel] [Help]

Set the voice trigger levels for Start and Idle so that the recorder is recording during conversation and idle during quiet.

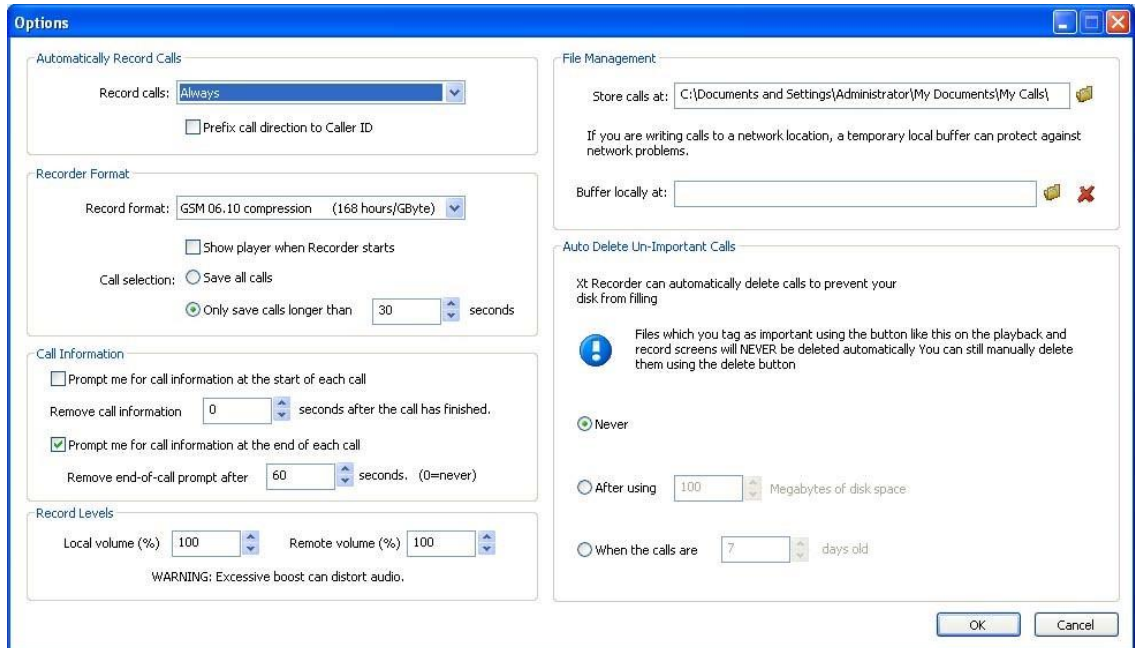


Your recorder is set up – click on Finish to start your recorder.

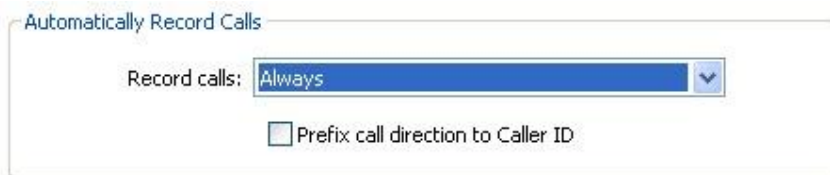
Program Settings

The Xtension Recorder application software when loaded is accessible through a desktop shortcut as well as by right-clicking on the icon that is loaded in the system tray of the PC. This system tray icon will also flash yellow and red to indicate an active call being recorded.

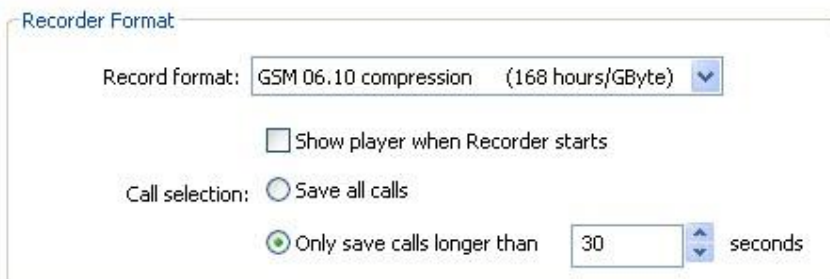
The View Options tab enables the installer and or user to set up the options available for that user. Once set, this view can be eliminated to the user, thereby making it impossible for them to change (see Advanced Setup Options).



Automatically Record Calls



This setting determines whether all calls are automatically recorded or if the recorder is intended for Manual Start/Stop only. Other options to record only incoming or outgoing calls may not be available on all installations depending on line provider and type of telephone instrument being used. For those installations that can identify incoming versus outgoing calls, these options are available. By selecting the 'Prefix' option, a '<' sign will be placed in front of the Caller ID to identify an incoming call and a '>' sign designates an outgoing call. In the case where the software cannot distinguish between incoming or outgoing it will be identified as 'unrecognized' and a '?' will be placed as a prefix.



Record Format - allows the user to select the recording format.

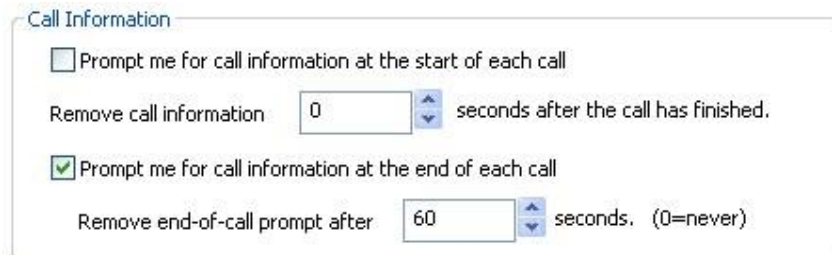
'Perfect Digital Recording' stores the recording in the PCM format taken directly from the recording device. This is the highest quality possible but can use a significant amount of space on the PC disk (35 Hours per GByte).

'GSM 06.10' (recommended) uses a compression technique to store the recording more efficiently (168 Hours per GByte). In practice, the difference in discernable quality is negligible so the default is for this format to be selected.

Call Selection

This setting determines the minimum length of a call that is saved. All calls are recorded from the very beginning of the call, but unless the call lasts longer than the period set, it will not be saved. This prevents short calls, miss-dials, etc from being saved.

Call Information



The screenshot shows a settings panel titled "Call Information" with the following options:

- Prompt me for call information at the start of each call
- Remove call information: seconds after the call has finished.
- Prompt me for call information at the end of each call
- Remove end-of-call prompt after: seconds. (0=never)

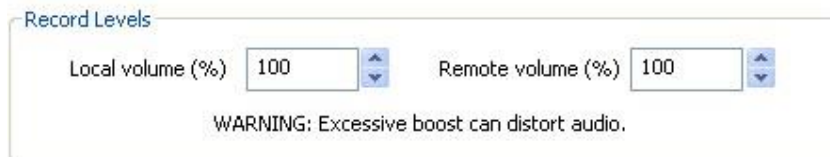
Prompt at Start of Call option will pop forward the Recorder View window. Note, this will occur any time the Recorder is active, even on very short calls.

Prompt at End of Call option is often preferred, as this will pop a box that allows the user to Save or Delete the call (if enabled) and also to add notes about each call if desired (shown below). This screen pop will only occur if the call has lasted the minimum period as defined in previous option.



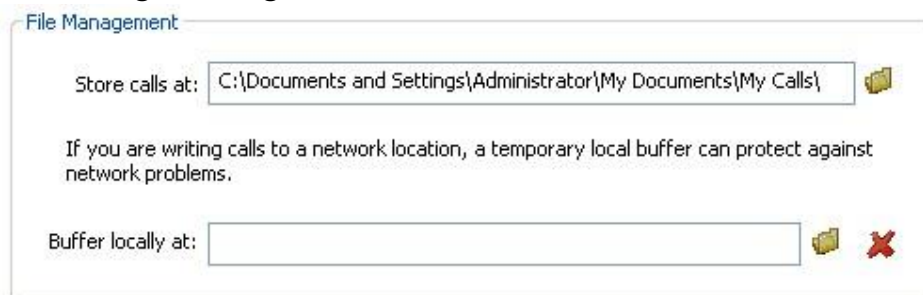
Example of Call Detail screen.

Record Levels



Each user can adjust the Recording Levels of either side of the conversation. The Local Volume is the recording level of the user; the Remote volume is that of the outside caller. If left at the default of 100% and 100%, no adjustment is made to the recording. Often the outside party is more difficult to hear in the recording due to level loss on the line; in that case an adjustment can be made to boost the level to the desired level. It is also possible, and often desirable, to decrease the volume if the Local side is too loud in the resultant recording.

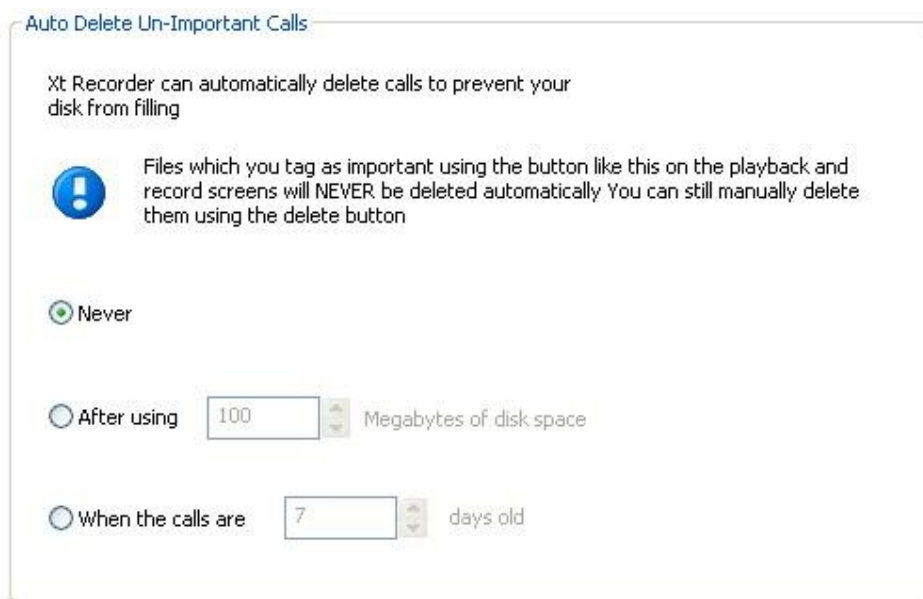
Call Storage Settings



If the local user desires to manage their own calls, then using the default storage location created is often preferred, a My Calls folder is created under My Documents.

If however, the calls are to be stored on a Network Drive for **Centralized Call Management**, then it is recommended that a local Buffer location be created on the Local PC. When a Local Buffer is created, the live call is buffered in the folder created (i.e. C:\Buffer) as an '.xtr.tmp' file. Once the call is completed, the recorder checks if the network location is available and if so, sends the call to the network storage location. If the network is not available, calls will continue to be recorded in the Buffer location. When one call is successfully sent to the network location, the entire buffer will also be transferred with no user intervention required.

Auto-Delete



This option automates the task of deleting calls after a predefined time or after a certain amount of space has been consumed. Note, any calls marked as Important will not be Auto-Deleted by this routine.

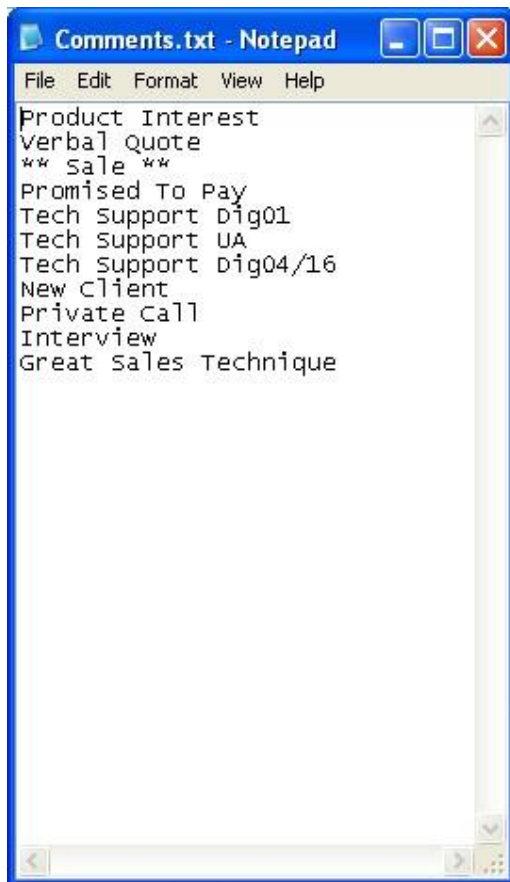
Advanced Program Settings

Comvurgent has also provided the dealer or user the option of making additional adjustments to the use and functionality of the user interface.

Customize Pre-Defined Comments

Located in the Program directory, which is loaded in default to C:\Program Files\Comvurgent\XT Recorder, you will find a file called Comments.txt. To

edit this file, open with Notepad and it will display the content as shown below:



Simply type in a column any number of comments and how you would like them to appear.

Once completed, select File>Save and replace the existing Comments.txt file.

The new list will then appear in your drop-down menus.

This will place the selected text in the comments field; more text can be appended to the notes if desired.

Restricting Access to Features and Functions

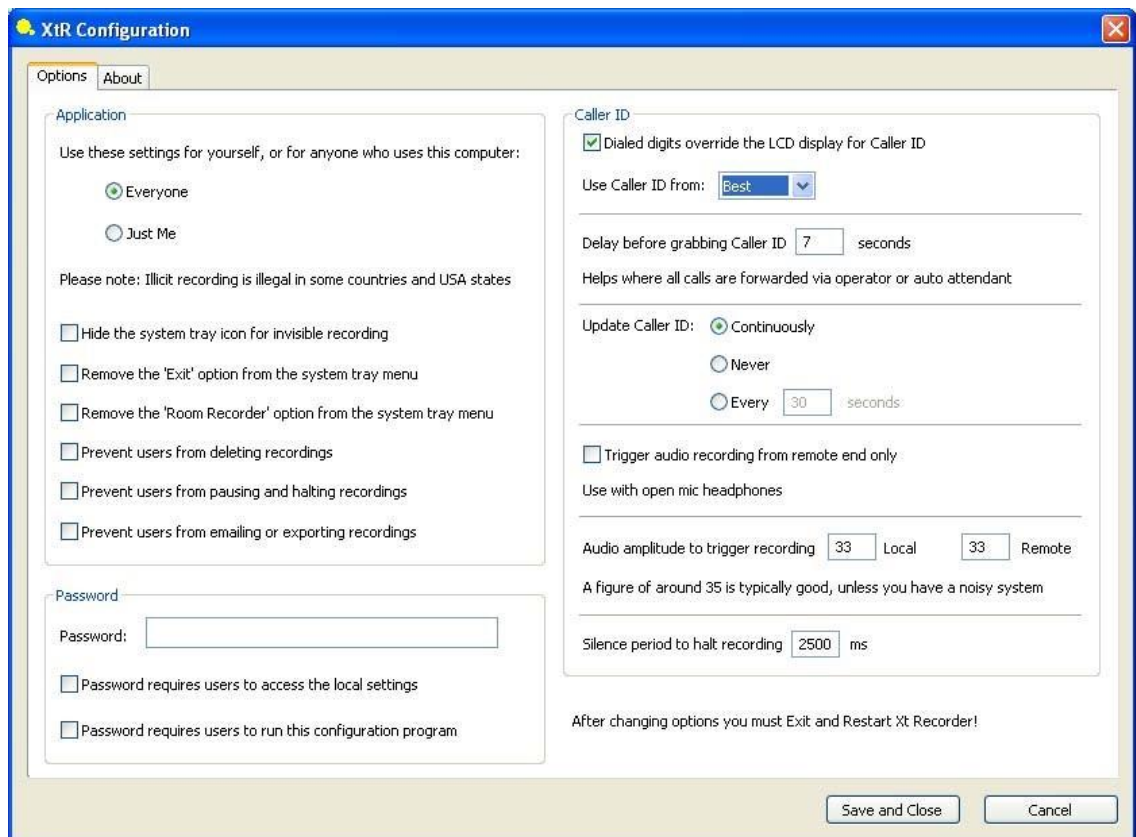
This configuration program can only be accessed by browsing to the installation location (default C:\Program Files\Comvurgent\XtRecorder) and then clicking on the XtRconfig.exe file circled below:

Note: The customer takes all responsibility to ensure they are meeting legal requirements. Comvurgent provides the user option settings in order to meet customer demands and cannot be responsible for the miss-application of the product.



Name	Size	Type
Intro.xtr	92 KB	XtRecorder Stored ...
Logo.dll	568 KB	Application Extension
Logo.ico	2 KB	Icon
LowLevel.dll	184 KB	Application Extension
Options.xtr	96 KB	XtRecorder Stored ...
Playback Features.xtr	107 KB	XtRecorder Stored ...
Recording Features.xtr	127 KB	XtRecorder Stored ...
XtRconfig.exe	200 KB	Application
XTRecorder.exe	364 KB	Application

This opens the following program:



XtR Configuration

Options | About

Application

Use these settings for yourself, or for anyone who uses this computer:

Everyone

Just Me

Please note: Illicit recording is illegal in some countries and USA states

Hide the system tray icon for invisible recording

Remove the 'Exit' option from the system tray menu

Remove the 'Room Recorder' option from the system tray menu

Prevent users from deleting recordings

Prevent users from pausing and halting recordings

Prevent users from emailing or exporting recordings

Password

Password:

Password requires users to access the local settings

Password requires users to run this configuration program

Caller ID

Dialed digits override the LCD display for Caller ID

Use Caller ID from:

Delay before grabbing Caller ID seconds

Helps where all calls are forwarded via operator or auto attendant

Update Caller ID: Continuously

Never

Every seconds

Trigger audio recording from remote end only

Use with open mic headphones

Audio amplitude to trigger recording Local Remote

A figure of around 35 is typically good, unless you have a noisy system

Silence period to halt recording ms

After changing options you must Exit and Restart Xt Recorder!

Save and Close | Cancel

Installing on Shared PC

Use these settings for yourself, or for anyone who uses this computer:

- Everyone
- Just Me

Please note: Illicit recording is illegal in some countries and USA states

This first setting is used when installing on a PC that has multiple user log-on Ids. If it is preferred that all calls, regardless of the user that is logged in, are stored in the same folder and have all the same settings- then select the 'Everyone' option.

Note- the User ID Header on each recording is taken from the PC User Log-in ID, so if each user logs into the PC with a unique login the recordings will be searchable and sort-able by the various User Ids.

It is also possible to have each user have their own settings, i.e. different storage folders etc. If this is desired select the 'Just Me' option. It will then be necessary to install the application under each user log-in on the PC.

Restricting Features and Functions

The following features can be restricted on a per user basis:

- Hide the system tray icon for invisible recording
- Remove the 'Exit' option from the system tray menu
- Remove the 'Room Recorder' option from the system tray menu
- Prevent users from deleting recordings
- Prevent users from pausing and halting recordings
- Prevent users from emailing or exporting recordings

Caller ID and Trigger Options

It is sometimes necessary to adjust how the recorder reads the Caller- ID information delivered to the telephone. (Note- not all versions capture CallerID info, please check with your re-seller).

Caller ID

Dialed digits override the LCD display for Caller ID

Use Caller ID from:

Delay before grabbing Caller ID seconds

Helps where all calls are forwarded via operator or auto attendant

Update Caller ID: Continuously

Never

Every seconds

The Recorder software reads the data for Caller-ID from the information provided your line carrier. For analog phone lines leave this setting at "Best" (the other options are for different interface devices)

Dealing with Headsets or 'Hot Mics'

Trigger audio recording from remote end only

Use with open mic headphones

Check this option if you find the recorder is either not stopping recording consistently, or triggers with background office noise while not on the telephone.

Sensitivity Adjustments

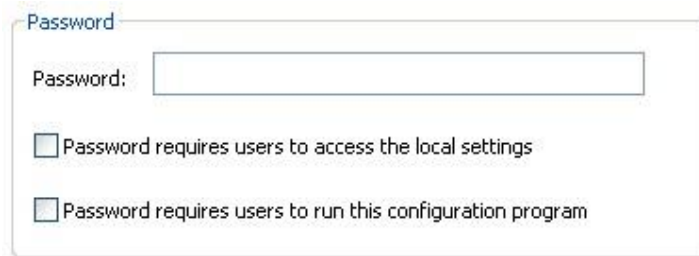
Audio amplitude to trigger recording Local Remote

A figure of around 35 is typically good, unless you have a noisy system

Silence period to halt recording ms

In the vast majority of cases no adjustments are needed here. With some lines a start/stop trigger for recording is based on a signal level, to make these triggers more sensitive lower the values above, less sensitive raise them.

Password

A screenshot of a software configuration dialog box titled "Password". It contains a "Password:" label followed by a text input field. Below the input field are two checkboxes: the first is labeled "Password requires users to access the local settings" and the second is labeled "Password requires users to run this configuration program". Both checkboxes are currently unchecked.

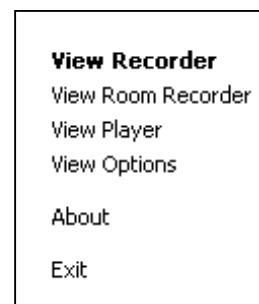
The above option for accessing Local Settings eliminates the ability for the user to access the Options View of the software. This prevents them from changing any and all options that are preconfigured.

The second option requires the Password in order to access the XTRconfig Program.

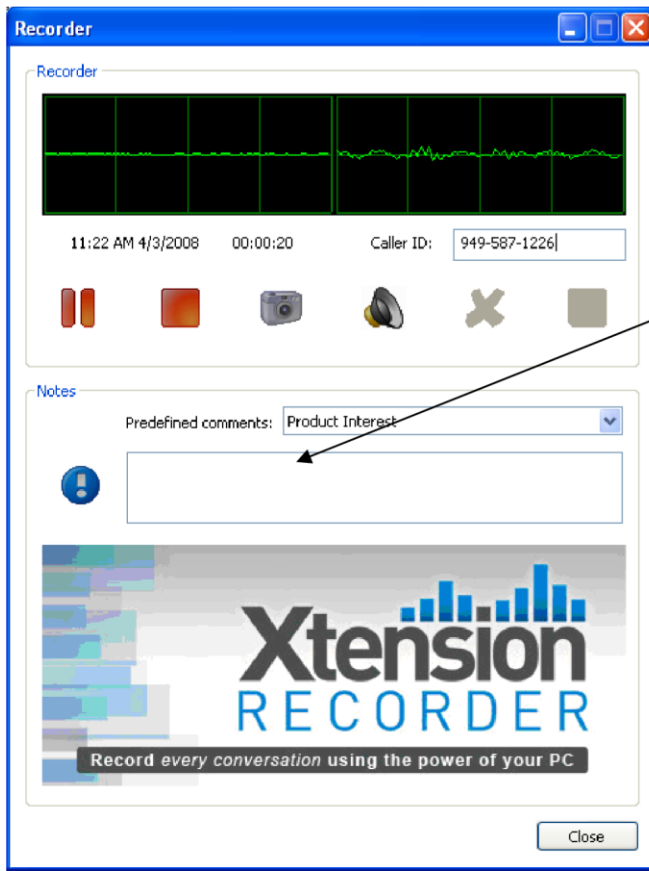
Important! For any changes made in the XTRconfig Program to take effect, the application must be Exited (choose exit from sys tray menu) and restarted.

Xtension Recorder Desktop Software User Interface

The Xtension Recorder application software when loaded is accessible through a desktop shortcut as well as by right-clicking on the icon that is loaded in the system tray of the PC. This system tray icon will also flash yellow and red to indicate an active call being recorded.



View Recorder



of this document.



This view allows the user to interact with the live recording if desired. The user can pause or stop



the recording (if enabled) as well as add notes about the call either by typing in as desired or selecting from a list of predefined comments that can be customized by each user- see page 7

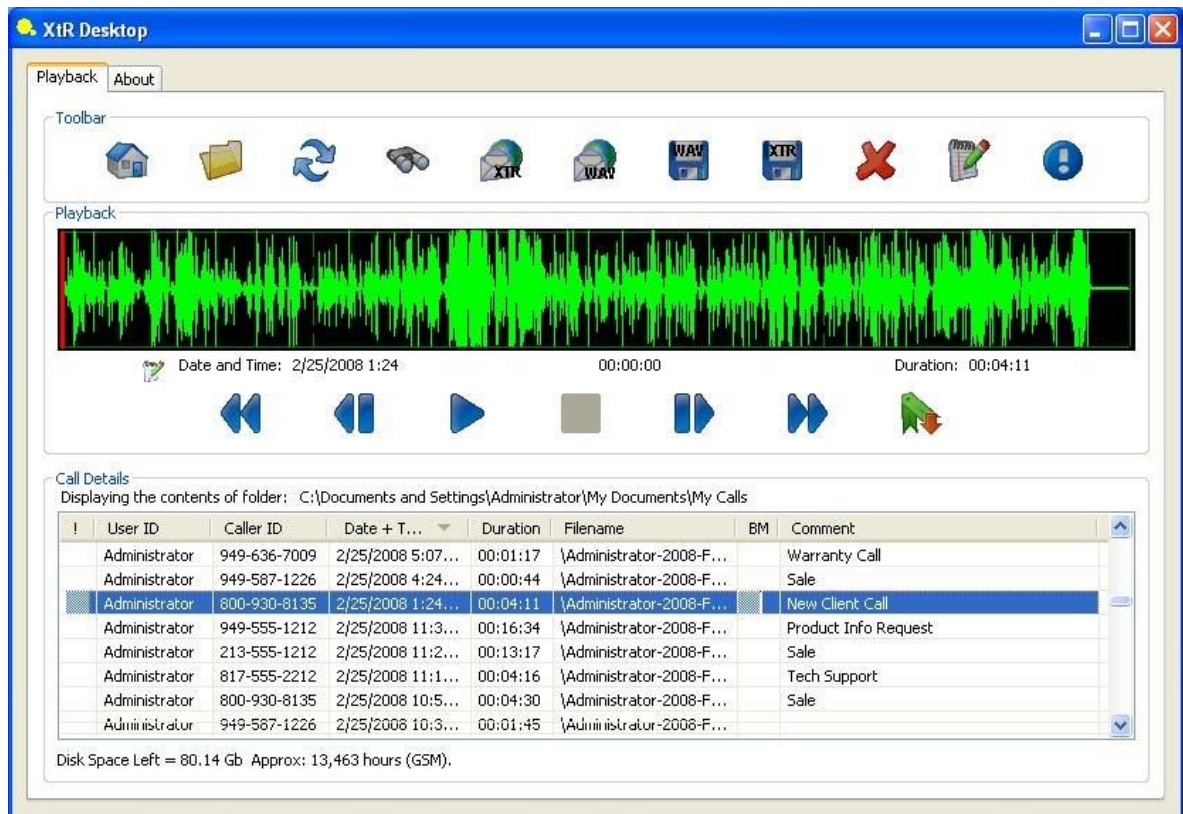
By clicking on the Snapshot Icon, the current call is placed into the Player for immediate playback while continuing to record.



The Speaker icon routes the audio from both sides of the recording through the PC Speakers. (Note: there is a slight delay as this

is not the 'live' call, but a recording of what has just occurred).

View Player

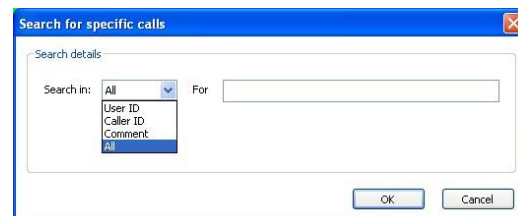


The **Basics of the Player** are quite simple. In default, the player will be directed to your storage folder that is set up in the Options Area under File Management. By selecting the **Home** icon the Player will return to view calls from this location.


While this view is displayed, new calls will appear as they are generated. You can view calls from other locations by selecting the **Browse** function and selecting the location from which to view calls, either on your local PC or network location.


The **Refresh** option will perform a new scan of the folder in view.

Select **Search** to enable searching for calls in view by User ID, Caller ID/Number Dialed, Comment or All. The search will then bring into view results from the current view that matches your criteria. To return to previous view, select the Refresh option.





E-Mailing Recordings

E-Mailing recordings couldn't be easier. To email as a proprietary and secured formatted recording select the first email icon option.  This will attach the recording to an outbound email message; an auto-text will be generated with a link to where the recipient of the email can download a free player.

The other E-Mail option is to select the **E-Mail as WAV**  icon, this first converts the recording to a wav file, then attaches to an outbound e-mail message.

Save Files to Other Locations / Convert Direct to WAV Format

It is often desirable to **Save and Move** important calls from one storage location to another. This is done quickly and easily by selecting the recording in the Player then clicking on the Save icon.  This XTR option will save the recording to another location in the native '.xtr' file format. By selecting the **WAV**  option, it will convert the file to a WAV format and then allow the recording to be saved in the desired location.


Deleting Recordings



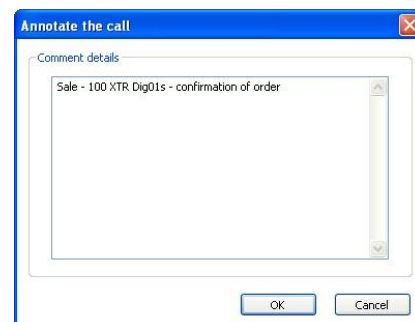
To delete an unwanted call, simply select the call or calls and then press the Delete icon

Note: The ability for a user to Stop, Pause, Email, Delete, and Convert Recordings as well as view the player and sys tray icon can be restricted on a per user basis. This is explained in the Advanced Set-Up Options located within this document.


Adding Notes to a Recording

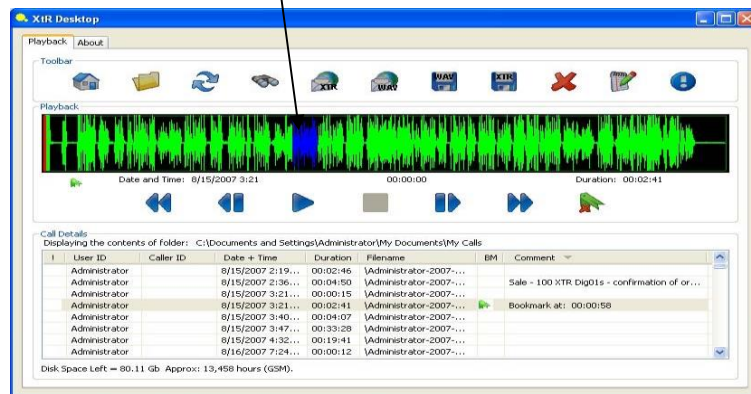
By selecting the **Notes** icon , the user can add notes to be stored as part of the call record.

Any item in the notes filed can then be used later to find the particular call.




Bookmark

A Book-Mark can be added to a Recording at any place. This can be used to highlight an important part of the call making it easy to find in the future. To Bookmark a part of the recording simply select Bookmark icon  at the point desired and the graphic will display the area book-marked in blue as shown below:



Important Calls

Calls can be marked as **Important** by selecting the call and clicking on the Important icon. This will highlight the call in the list as well as remove it from any auto-delete routine established in the Options Area. 

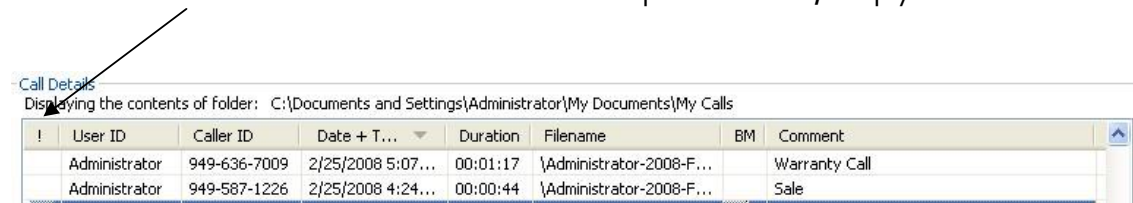
Playing Calls

Click on the desired recording in the Play Back List and the call select will be loaded into the Player. You can 'click' on the wave form in the player to move from one point in the recorder to another or use options shown below:



Sorting Calls in View

Calls loaded into View in the Player can be sorted by each individual column by clicking on the column header. For example, sort for all 'important' calls, or perhaps all calls that have comments associated with them. To return to the previous view, simply hit the Refresh



Call Details
Displaying the contents of folder: C:\Documents and Settings\Administrator\My Documents\My Calls

!	User ID	Caller ID	Date + T...	Duration	Filename	BM	Comment
	Administrator	949-636-7009	2/25/2008 5:07...	00:01:17	\Administrator-2008-F...		Warranty Call
	Administrator	949-587-1226	2/25/2008 4:24...	00:00:44	\Administrator-2008-F...		Sale

icon.