

USB Recorder



User's Guide

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1. Recording and Playing

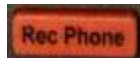
1-1 Using the Recorder



One of the ways to record and play back conversations is by using the buttons on the USB Recorder itself (assuming the current user's ability to do so has not been disabled on the User Administration screen, covered in section 4-2).



– Plays the last file recorded.



– Begins recording from the phone. Press the button again to stop recording.



– Begins recording from the room, using the room microphone. Press the button again to stop recording.

1-2 Using the Software



One can also record and play conversations using the software player.



– Begins recording.



– Stops playback or recording.



– Plays a recorded conversation.



– Pauses playback or recording.



– Rewinds playback by three seconds.



– Fast-forwards playback by three seconds.



– Skips playback to the beginning of the recording.



– Skips playback to three seconds from the end of the recording.



– The slider allows jumping to a given point in the recording.

Rec. Room – If checked, the software player’s record button will record from the USB Recorder’s room microphone. Otherwise, the record button will record from the phone.

Play Phone – If checked, recordings will be played using the telephone, rather than using the PC speakers. This setting will affect the function of both the software play button and the [Play/Stop] button on the USB Recorder.

1-3 Automatic Recording

The USB Recorder supports automatic recording from both the telephone and the room microphone. The administrator must enable these features for a particular user. For more information, see section 4, Administration, and specifically section 4-2, User Administration.

1-4 Sparky Model Support

The Sparky model USB Recorder enables headset usage, and the ability to play recordings over a phone connection. If you have a Sparky model and wish to enable these features, click the Full Screen button on the player, and select the ‘Device Control’ tab:



Click to view the full-screen player.

On the Device Control tab, click the ‘Sparky Functionality’ checkbox on the top right, then click the Save button.



Click to save your changes.

The Use Headset checkbox will appear on the main player, alongside the Record Room and Play Phone checkboxes:

Use Hdset The Use Headset checkbox.

When checked, this option allows you to use the headset instead of the telephone for conversations or playback.


Note: For the headset to function, the telephone *must* be off hook. To answer a call when the headset is active, simply pick up the actual telephone and place it on your desk. Do not hang up until you are through with the conversation. Another consequence of this requirement is that the headset alone cannot be used to make a recording—you must have the telephone off hook to record headset audio.

2. Organizing Recordings

The recorder software provides two functions for organizing recordings. The first, covered in section 2-1, is a list view of all a user's recordings. The second, explained in section 2-2, is a facility for changing the filenames of recordings, assigning subjects and sources, and bookmarking/commenting certain locations within the recording.

2-1 Recording List

To view the Recording List, click the List button on the right side of the main player:

 **List** Click the List button to bring up the Recording List.

The Recording List will come up below the player:



Click any of the recordings in the list to play that recording. The list can also be sorted by the data in a given column by

clicking on any of the column headers. Clicking on the same column again switches between an ascending/descending sort order. An icon of a hand distinguishes between the two:

List	Rec. Data
Date	Length
152 06/04/04 11:01:52	00:00:06 ..
138 06/05/04 11:01:38	00:00:08 ..
052 06/06/04 11:00:52	00:00:07 ..

Recordings sorted in ascending order by date.

List	Rec. Data
Date	Length
052 06/06/04 11:00:52	00:00:07 ..
138 06/05/04 11:01:38	00:00:08 ..
152 06/04/04 11:01:52	00:00:06 ..


Recordings sorted in descending order by date.

Right-clicking a recording brings up a popup menu where you can remove the recording, back it up (copy it to the user's backup directory), do both, or email it to a third party:

Query	List	Rec. Data	Device Control
Type	File Name	Date	Length
1 R	040518173121	05/18/04 17:31:21	00:00:07
2 R	040518181820	05/18	00:00:07
3 R	040518181820	05/18	00:00:07
4 P	040518181820	05/18	00:00:07
5 P	040518181820	05/18	00:00:07
6 P	040518181820	05/18	00:00:07
7 P	040518181820	05/18	00:00:07

2-2 Recording Data

With a recording selected from the 'List' tab, click the 'Rec. Data' tab. You can also access the Recording Data tab from the player by clicking the Data button on the player:

 **Data** Click the Data button to bring up the Recording Data tab.

The Recording Data tab:



File Name, Subject and Source

File Name – The recording's current file name.

New Name – Here, you can enter a new name for the recording.

Subject – The subject of the recording.

Source – The source of the recording.



– Save button. Click to save changes to the file name, subject or source.



– Delete button. Click to delete the recording altogether.

Bookmarks and Comments

A single recording can have multiple Bookmarks and Comments, as they mark an instant of time within the recording. A Bookmark is just a simple marker, allowing the user to quickly return to a specific moment within the recording. A Comment is the same thing, but with the added ability to attach a note.

Bookmarks

To add Bookmarks, start playing a recording. When the moment you wish to mark arrives, click either the Bookmark button on the 'Rec. Data' tab:



Click to set a Bookmark.

Or click the Bookmark button to the right of the recording time display on the player:



Click to set a Bookmark.

Added Bookmarks will appear in the Bookmark list, along with a number indicating the number of seconds into the recording they mark:




To give a Bookmark a short name, click on it, type the name in the field between the list of Bookmarks and the Bookmark button, and press [Enter]:




Comments

Comments are an extension of Bookmarks that also allow you to save a short note about the marked position.

To add a Comment, start playing a recording. When the moment you wish to mark arrives, click either the Comment button on the ‘Rec. Data’ tab:

 **Comment** Click to mark the Comment location.

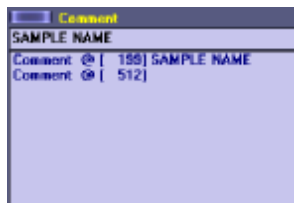
Or click the Comment button to the right of the recording time display on the player:

 **Comment** Click to mark the Comment location.


Added Comments will appear in the comment list, along with a number indicating the number of seconds into the recording they mark:



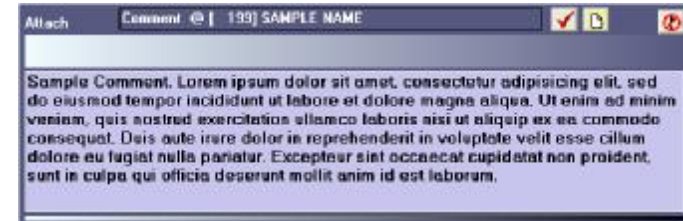
To give a Comment a short name, click on it, type the name in the field between the list of Comments and the Comment button, and press [Enter]:




To edit the actual Comment, select the Comment you wish to edit from the list, and then click the Edit Comment button:


 Click to edit a Comment.


The Comment editing screen will appear:



The text seen above starting with “Sample Comment” is the text of the comment, which you can edit here. The buttons on the top right work as follows:


 – Saves the changes to the Comment.

 – Clears the text in the Comment editing section.

 – Exits the Comment editing screen without saving changes.

Emailing a Recording

To email a recording, select from the ‘List’ tab the recording you wish to email, and then click the Email button at the bottom of the ‘Rec. Data’ tab:

 Click to email a recording.

The Email Recording screen will appear:



Type in an email address in the 'Send To...' field, or select one from the popup menu of addresses previously used. Next, type your message into the space below the 'Send To...' field. Finally, click the Check button to send the email.



Click to send the email.

Note: The system administrator must have entered an email server for the system, and an email address for the user, for this function to be available for a given user.

Other buttons on the Email Recording screen:



– Clears the destination email address, as well as the text in the email editing section.



– Exits the Email Recording screen.

3. Queries

The 'Query' tab displays the Query screen:



To run a query, you select the various options you wish to use when querying the recordings, and click the Check button. The Recording List screen will appear, with only the recordings which match the Query displayed.



Click to run the query.

To clear a query and return the List view to showing all recordings, click the New button, which erases all the query settings, and then the Check button to run the blank query.



Click to reset all query options to blank.

Preset Query Options

The five checkboxes below the 'Query Name' field are preset queries.

All – Return all recordings.

Today – Return recordings made today.

Last – Return the last recording made.

Rec. Phone – Return all recordings made from the phone.

Rec. Room – Return all recordings made from the room.

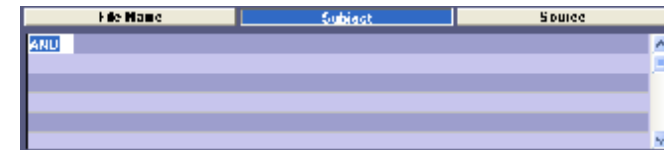
Date/Time and Length Query Options

You can select a date/time range for the query, as well as a length range. Note that times of day must be entered in 24-hour format. Both specific times and lengths of time are entered in hour-minute-second format.

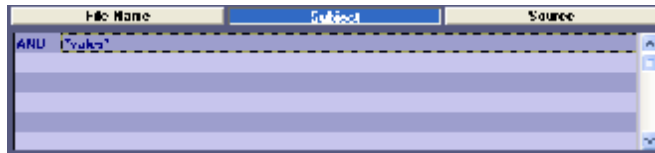
File Name, Subject and Source Query Options

The File Name, Subject and Source query options all work the same way, and are best explained by example. The following are the steps to query for all recordings with a subject that contains the word "sales". The File Name and Source query functions operate identically.

First, select the 'Subject' tab. Now, click in the first column of the first line. The word "AND" should appear (the AND and OR keywords will be explained momentarily):



Click in the second column, and type "*sales*". (The asterisks are wildcards, and indicate that any string of zero or more characters can occur before or after the word "sales".) The input in the second column is case insensitive, so there is no need to worry about capitalization.

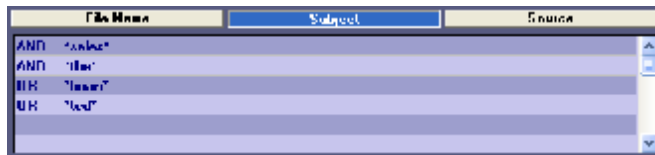


Finally, click on the Check button to run the query. All recordings with subjects containing “sales” will be returned:

Type	File Name	Date	Length	Subject	Source
1	n- 040510101020	05/22/04 10:10:20	00:00:03	NADCHI SALES CALL	...
2	n+ 040510101040	05/10/04 10:10:40	00:00:03	WIDGET SALES	
3	n+ 040510120300	05/19/04 12:03:00	00:00:41	DE SALES UNIVERSITY	

AND and OR Keywords

The AND and OR keywords have a simple function, if not necessarily straightforward. Recordings matching query text following any OR keyword will be displayed on the results list. In contrast, the AND rows’ query text gets grouped together, so that only recordings matching the query text of every AND row will appear on the results list. For example, take the following query:



This query will return any recording containing “brian” in the subject, any recording with “ted” in the subject, plus any recording with both “sales” and “the” in the subject.

Saving Queries

To save a query in order to run it again later, type a name into the ‘Query Name’ field, and then click the Save button.



Click to save a query.

When you wish to re-run the query, simply select it from the ‘Query Name’ popup menu, and click the Check button.

4. Administration

The administrator's User ID is ADMIN, and the password is initially blank. This password can be changed from the General Administration tab, covered in detail below.

4-1 General Administration

General administration options are controlled from the 'General' tab on the administration screen:

Login Needed – If checked, users will always be required to enter a User ID and Password, i.e. no automatic login (see section 4-3).

Main Data Location – This is the directory where the system will keep the user settings database.

Email Server – The SMTP server for outgoing user email.

General Server – Reserved for future use.

FTP Server – If a valid FTP server is entered here, every time a user completes a recording, the recording will be uploaded to

the specified server. The username/password and upload directory are specified under the Users tab (see section 4-2).

New Admin Password / Confirm Password – Use these fields to change the admin password.



– Save button. Click to save your changes.



– Clear button. Click to reset all data fields.

4-2 User Administration

User administration options are controlled from the 'Users' tab on the administration screen:

User List – This popup menu allows the administrator to select any of the users on the system, and change their settings.

User ID – The user's User ID.

Password – The user's Password.

User Name – The user's Name.

Prefix – A three-letter prefix appended to all audio files created by the user.

Data Dir – The first Data Dir field is the directory the user's audio files are stored in. Click the 'Data Dir.' button to browse for a new location.

The second Data Dir field is the directory used for storing backups of the user's audio files. This directory must be typed in manually.

User Email – The return email address shown on emails the user sends.

FTP... – Press this button to toggle the visibility of the FTP Options panel (see below).

Last LogIn – The date and time the user last logged in.

FTP Options



The image shows a small window titled 'FTP Options' with a blue border. It contains three text input fields stacked vertically. The first field is labeled 'User Name', the second is labeled 'Password', and the third is labeled 'Remote Dir.'.

User Name – The user name to use when logging into the FTP server specified under the General tab (see section 4-1). If no name is specified, the system will not attempt to backup recordings to FTP.

Password – The password to use with the FTP server.

Remote Dir. – The directory to upload files to. Can be relative to the user's home directory, or an absolute path. If left blank, files will be uploaded to the user's home directory.

Checkbox Settings

Open To System Tray – If checked, the user can only run the software in the background, never seeing a player, only a system tray icon. In this mode, the user can only record using the buttons on the USB Recorder itself, or through automatic recording of conversations. Note that a user with this option enabled cannot even quit the software his or herself—an admin or other user with higher access must log in first.

Close To System Tray – Indicates that when the player is closed, the application will simply collapse to the system tray and continue running in the background.

Start With Small Player – This option indicates that upon logging in, the user is initially presented with the small version of the player. The default is for the large player to come up at first.

View List LIFO – Orders the user's recording list (see section 2-1) from most recently recorded to least recently, instead of the other way around.

Disable auto List Update – Stops the software from updating the recording list every time a new recording is made. Can greatly improve performance in situations where a user has thousands of saved recordings.

Allow Profile View – Enables the user to see the settings the Admin has given them through the 'Profile' button on the player.

Disable Box Keys – Disallows the user from accessing the USB Recorder functionality by pressing the buttons on the recorder itself.

Automatic Recording Settings

Auto Room Recording / Auto Phone Recording – Enables or disables automatic room/phone recording. Only one of these can be active at a time.

Voice Activation Start – Duration, in seconds, for which system must hear audio to begin automatic recording. The default is 4 if no value is entered.

Ends – Duration, in seconds, for which system must hear silence to turn off automatic recording. The default is 4 if no value is entered.

Sensitivity – The threshold at which the automatic recording function determines noise from silence. The default is 100 if no value is entered. The range is from 0 to 255, with 0 being the most sensitive.

Buttons



– Save button. Click to save a new user, or to save changes to a previous user's settings.



– Clear button. Click to reset all data fields.



– Delete button. Click to delete a user from the system.

4-3 Automatic Login

When the software is first setup, Automatic Login (see section 4-1) is enabled by default. When enabled, there are two cases where automatic login will occur:

- 1.) Users with the Open to System Tray option selected (see section 4-2) will be automatically logged in, if they were the last user to access the system.
- 2.) If the last user to access the system is not an Open to System Tray user, the system will log in as the default user (UserID URX, password URX). If this default user does not exist, the system will create it.