



Enterprise Call Recorder

Installation and Setup Guide

Algo ECR Version 2.3
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About this Manual

This User Guide includes the information you need to install and set up the ECR System.

Who this Manual is for

This manual is for system installers who are responsible for installing and setting up the ECR System.

How this manual is organized

This manual is organized into four main sections.

The first section (“Introduction to the ECR Setup Process”) provides an overview of the setup process, including providing a checklist of things you’ll need before getting started.

The second section (“Installing & Configuring ECR”) provides detailed instructions on how to install ECR Software and how to configure it to work with your hardware.

The third section (“Upgrade Installation Instructions”) provides instructions on how to upgrade ECR Software from an older version.

Finally, the fourth section (“M2250 Console Configuration”) provides special instructions on how to use ECR with the Nortel M2250 Attendant Console telephone.

Related Documentation and Software

For help installing ECR, please consult the QuickStart guide that is provided with your ECR call recording hardware.

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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Introduction to the ECR Setup Process

Setting up your Enterprise Call Recorder (ECR) System is a straightforward step-by-step process that can be accomplished quickly and requires minimal technical expertise. Of course, the exact process will vary slightly depending on the specific recording equipment you plan to install and the goals you have set out for your system – however, in most cases you should be able to have a basic system set up in minutes, and not hours.

Pre-Installation Checklist

Recording Hardware, Cables and Accessories

Please consult the documentation that came with your ECR hardware to ensure that you have all the parts and pieces you need to install the various system components. This will include the ECR hardware components themselves such as the 4210 ECR Shelf, AuxBoxes, USB cords, and telephone cables. In addition, you will require one or more ECR licenses.

Tools

If you're installing a 4210 ECR Shelf, you'll need a screwdriver to mount the shelf in your rack system. Otherwise, if you're using AuxBox recorders (such as the 4102 Digital AuxBox), generally you will not need any special tools.

Basic Telephone Interconnect Knowledge

If you are using the 4210 ECR Shelf, you will require a telephone technician (or someone familiar with the wiring of the telephone system) to complete the telephone interconnect wiring. Otherwise, if you are installing AuxBox recorders, no special telephony experience is required.

Have a Plan

As with anything, it helps to have a plan and a set of goals before you start. Toward this end, it will help to have the answers to the following questions:

- Do you have a PC ready which will serve as the ECR Server and does it meet the minimum requirements?
- Which telephones do you plan to record and monitor?
- Where will the ECR Server PC be located?
- From which PC's do you require access to the ECR System?

Choose a Hardware Layout

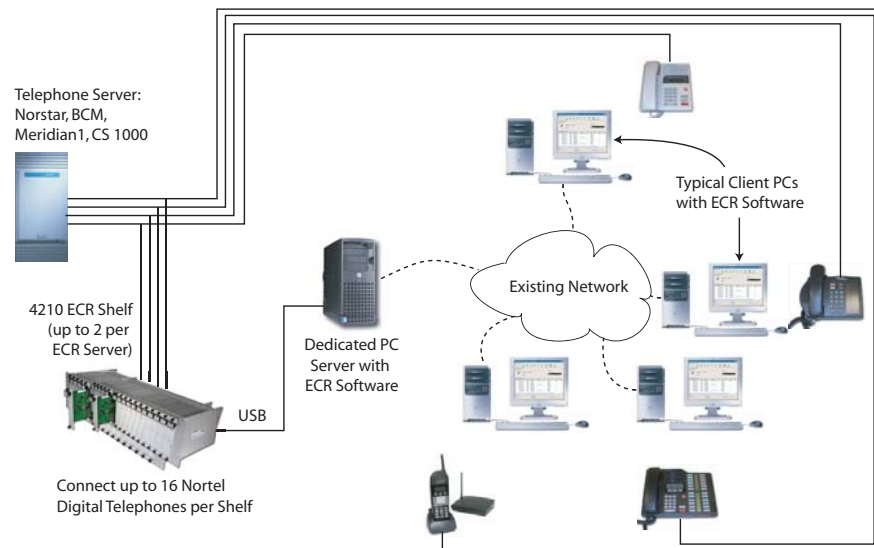
The ECR Software Installation procedure will vary slightly depending on the hardware layout. ECR supports two main types of hardware layouts: Centralized and Distributed. Plus, systems can be set up in a hybrid fashion, combining elements of both types of layouts.

Centralized Layout

A Centralized Layout (the most common) is based primarily on the use of the 4210 ECR Shelf, of which up to two can be used in single ECR System. Such a layout can also include one or more AuxBox recorders. In this layout, all telephone connections to recording hardware are made in a centralized and physically secure location, typically the Telephone Room. From there, the hardware connects to the ECR Server PC via USB, and then to the network via this Server PC.

A Centralized layout makes hardware setup and configuration easier because all hardware is attached to just one PC (the ECR Server). An added benefit is that the secure location of the connections prevents users from unplugging recorders, as could be the case with local desktop devices. As with any layout, there can be an unlimited number of Client PCs set up to access the system, in addition to the ECR Server.

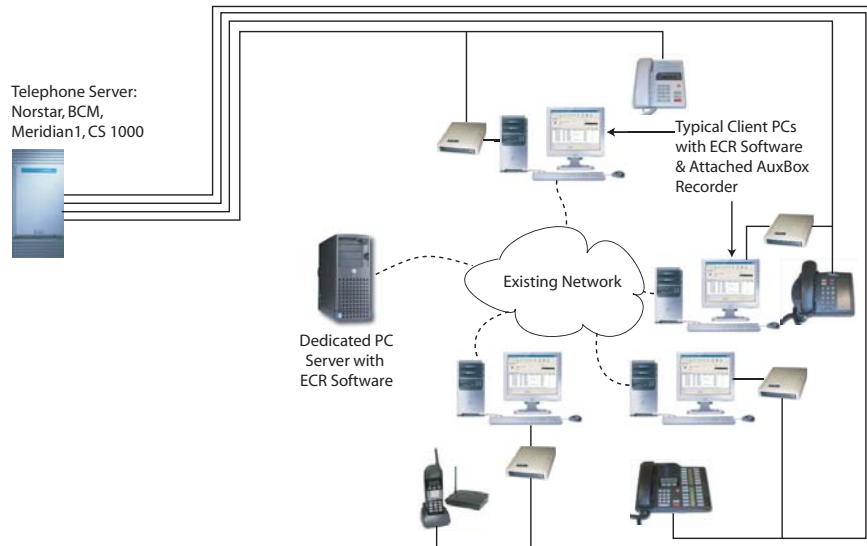
Typical Centralized Layout Diagram



Distributed Layout

A Distributed Layout is based on the use of AuxBox desktop call recorders that interface to the network via Client PCs on the network. Rather than connecting to the telephone system in a centralized location, the AuxBoxes are connected at the individual telephone stations. A Distributed Layout still requires a PC to act as the ECR Server however that server does not require any recording hardware attached to it.

Typical Distributed Layout Diagram



Choose a PC to be the ECR Server

Independent of layout, each ECR installation must have one PC designated the ECR Server.

Algo recommends that this PC be dedicated to the task of call recording and that no other CPU intensive software be installed. The nature of real-time call recording requires continuous access to CPU and memory resources to encode all audio streams instantaneously. Limited access to these resources could result in lost call information beyond the ability of the ECR to recover.

The ECR Server PC must meet the following minimum hardware requirements. These are the minimum specifications required to ensure a stable and robust call recording system. It is recommended that mission critical call recording installations consider the addition of backup hardware like RAID drives and DVD burners to ensure that no call information is lost in the event of hardware failures.

By definition, the robustness of the ECR is limited by the quality of the hardware and operating system it is running on. Please consult with Algo if you have any concerns regarding hardware or software compatibility that may conflict with the ECR.

The ECR Server PC must meet the following hardware specification:

Operating System	Windows 7 (32-bit only), Vista, or XP Pro* (dedicated to ECR application)
CPU & RAM for up to 16 stations	Intel®Core™ 2 Duo Processor, 1.80GHz, 1GB RAM or Dual-Core Intel® Xeon® Processor, 1.86GHz, 1GB RAM

CPU & RAM for up to 32 stations	Intel® Core™ 2 Duo Processor, 2.40GHz, 1GB RAM or Dual Core Intel® Xeon® Processor, 2.40 GHz, 1GB RAM
System Accessories	USB Port(s) & Sound Card
Optional Accessories	CD-RW/DVD Combo

* Windows 7 (32-bit only), Vista, and XP Pro are the recommended Operating Systems for ECR Software, however, Windows Server 2003 is also supported

Choose Client PCs for Distributed Layout or Operator Access

Client PC installations are required on any PC with an attached AuxBox (in Distributed Layouts) and PCs where Operator or Supervisor access to the ECR is desired. Client PCs must be able to connect to the ECR Server over the network, and must meet the follow minimum hardware requirements:

Operating System	Windows 7 (32-bit only), Vista, or XP Pro
CPU & RAM	450 MHz Pentium III & 256 MB RAM
System Accessories	Sound Card & CD-ROM

Installing & Configuring ECR

Step 1: Connect Hardware to ECR Server

The first step to install the ECR System is to connect the Algo recording hardware to the ECR Server PC (as in a Centralized Layout). This is the recommended layout for ECR systems. Hardware, however, can also be connected to selected Client PCs (as in a Distributed Layout). Consult the Installation Guide included with the recording hardware for detailed connection instructions.

Step 2: Install ECR Software

An ECR system can operate on just a single PC or it can be used on a network of many PCs. Regardless, ECR Software must be installed on any PC that will be a part of the ECR System. Starting with the ECR Server PC, which is required for the system to operate, ECR Software can also be installed on an unlimited number of other PCs ("Clients"). Client PCs can be used for accessing the system (e.g. for Supervisor monitoring) or to host and access localized recording hardware (i.e. desktop AuxBoxes).

A Note About Client PCs

Access to ECR from networked PCs is provided by the Client installation. Windows[®] network access to the ECR Server PC is required to access the system from a Client PC.

An ECR Client installation is required on every PC with an attached AuxBox recorder (if using a Distributed Layout). The Client installation provides the recording software to transfer and store call data to the ECR Server. The Client installation also provides the ECR interface programs to access the recording system.

The Install Process

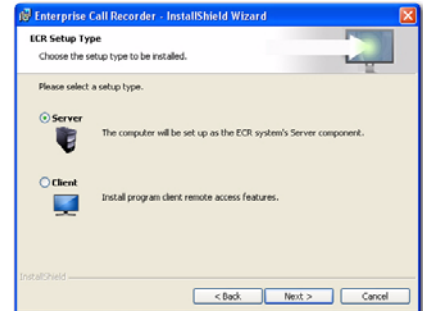
The following process describes how to install ECR Software to make up a complete ECR system. It covers the installation for both the Server PC and any Client PCs you plan to include. It is important to start first with the Server PC and then progress to the Client PCs.

1. Place the ECR Installation CD in the CD-ROM drive of the PC to begin installation. The Installation Wizard will start automatically; if it does not, navigate to the CD-ROM drive and run the installation (.exe) file.
2. The Installer will automatically check for Windows[®] Media

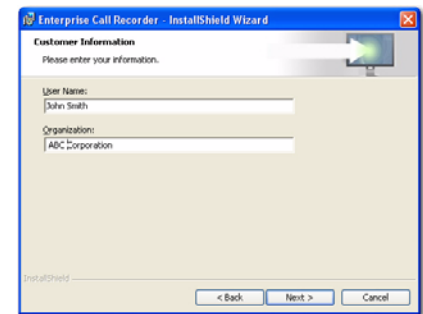


Encoder, a program required by ECR to capture and convert audio to Windows Media formats. If Windows® Media Encoder is detected, the Installer will proceed directly to the Installation Package screen. If Windows® Media Encoder is not detected, it will be automatically installed.

- If this is the first PC you are installing on and it is the Server PC, choose Server when prompted to select ECR Setup Type. Otherwise, select Client.

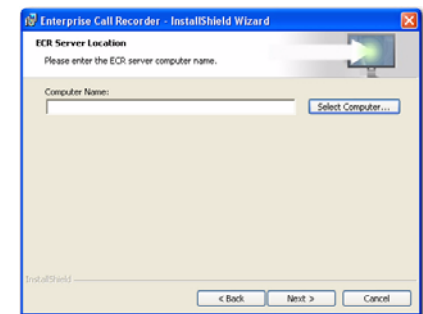


- If desired, fill in the User Name and Organization fields. Once complete, click Next and skip to Step 6.



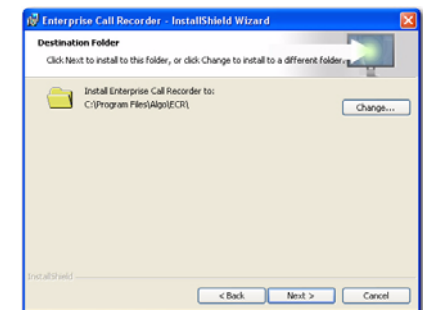
Server Name

- For Client Installations, enter the Windows name of the Server PC when prompted. To find the Server PC computer name, please refer to "Windows Computer Name" on page 10.



Set Program Files Directory

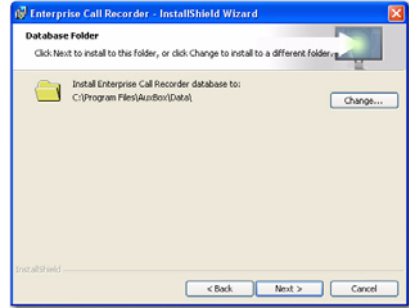
- Select the directory where the ECR program files are to be stored. You can accept the default location or click Change to set a location of your own choosing. Note that the Program Files Directory must be located on the local machine - a network drive can not be selected to store the programs.



Once complete, click Next. If this is a Client PC installation, after clicking Next, please skip to Step 8.

Set Call Storage Directory

7. For the Server Installation, select the Call Storage Directory when prompted. You can accept the default location or click Change to set a location of your own choosing. All call records from all Stations will be stored in sub-directories within the selected folder.
8. Restart the computer when prompted. This completes the ECR Software Installation. If you are installing the software on a Server PC or on a Client PC with recording hardware attached, the next step is to configure the software using the System Wizard (refer to "Step 3: Configure the System using the System Wizard" on page 11). Otherwise, if you have just installed the software on a Client PC and have no recording hardware attached, no further installation procedures are required for that computer and it is ready for system operation.



Note on Firewalls

When ECR runs the first time, your PC's firewall may prompt you to allow the ECR components access to the network. If so, allow access to any of the following when prompted:

- ECCR_Admin.exe
- ECCR_Agent.exe
- ECCR_Server.exe
- ECCR_M2250Recorder.exe
- ECCR_4102Recorder.exe
- ECCR_4105Recorder.exe
- ECCR_5006Recorder.exe
- ECCR_Config.exe
- ECCR_ECV.exe
- ECCR_ESV.exe

Firewalls can block communication between the ECR Server PC and Client PCs resulting in lost call data. Firewalls included with Windows® XP Pro SP2 and Windows Vista are enabled by default. Disabling the Windows® firewall is another option, but should only be done in secure environments.

Windows Computer Name

If you plan to install ECR Software on one or more Client PCs, you will need to know the Windows® name of the Server PC. The Windows® name can be found in the Control Panels -> System -> Computer Name Tab, on the Server PC. The value listed in the 'Full Computer Name:' section contains the Windows® computer name. Note the trailing period, if one is populated, is not part of the computer name.

Step 3: Configure the System using the System Wizard

Once ECR Software is installed, the System Wizard in the ECR Configuration Tool is the primary interface for setting up and updating ECR system hardware and station licenses. Based on an easy-to-follow process, it guides you through the following four steps to complete the setup of ECR Software and hardware:



1. Initialization
2. Enter Licenses
3. Configure Stations
4. Configure Users

Note that using the System Wizard only applies to setting up the ECR Server PC and, if applicable, any Client PCs with one or more recorders attached. There is no need to use the System Wizard on a Client PC that has no recording hardware attached.

Using the Wizard

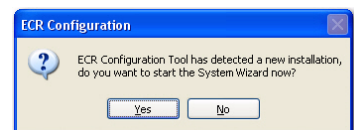
1. Launch the ECR Configuration Tool using the the desktop icon, or the Start Programs menu.



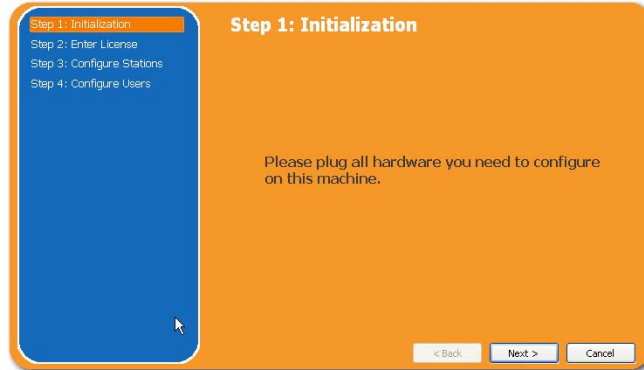
2. Login to the Configuration Tool using the default Username and Password:
Username: admin
Password: admin



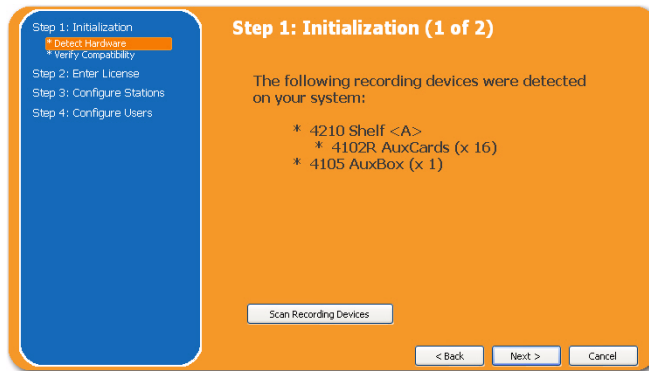
3. The New Installation window will pop up after logging in. Click <Yes> to automatically start the System Wizard that provides a guide to the rest of the setup and configuration process.



Step 1: Initialization

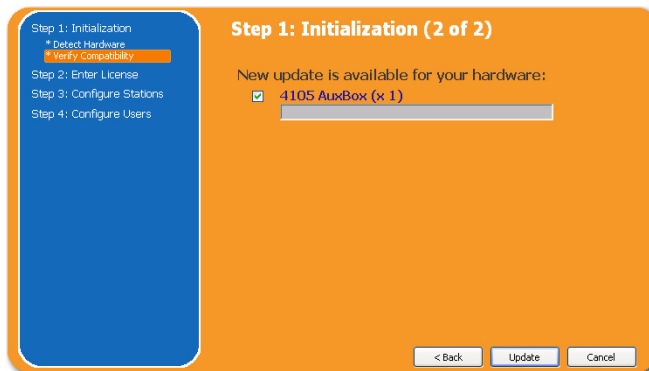


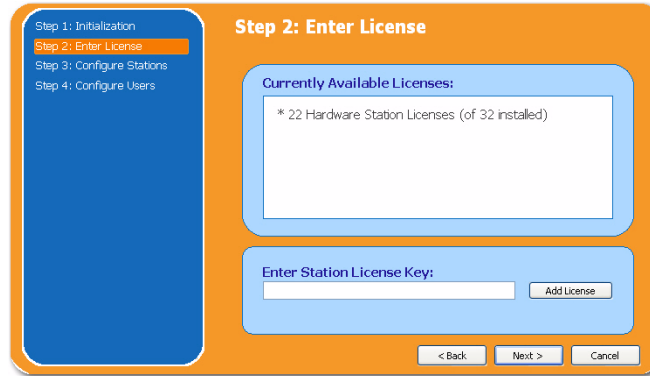
4. This screen provides a reminder to connect all hardware to the PC before proceeding. Once you are sure everything is connected OK, click Next. The System Wizard automatically detects any equipment connected to your PC.



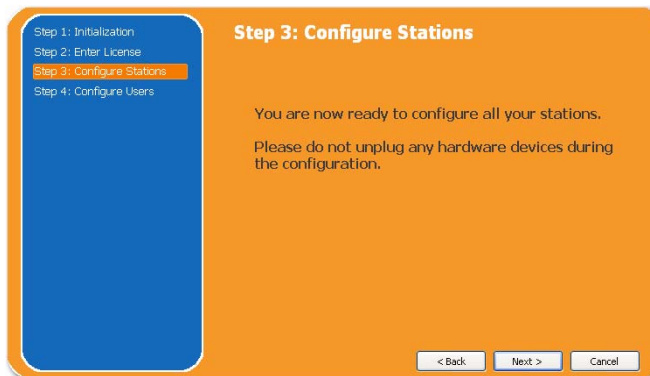
5. If any hardware on the system has old firmware installed, the system detects this and prompts you to update. To update the firmware, click the Update button and follow the prompts.

Note: All new Algo recording hardware (AuxBoxes and AuxCards) ship with the latest firmware.

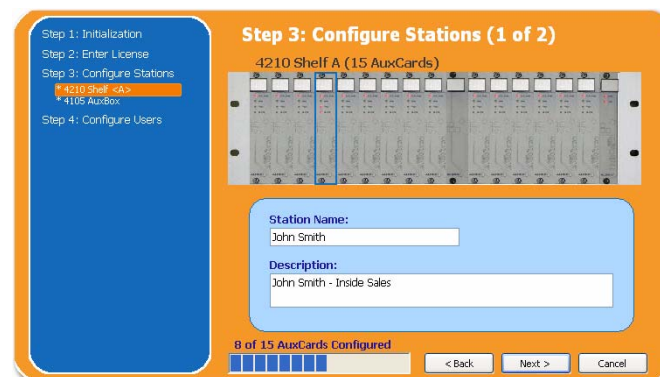


Step 2: Enter License

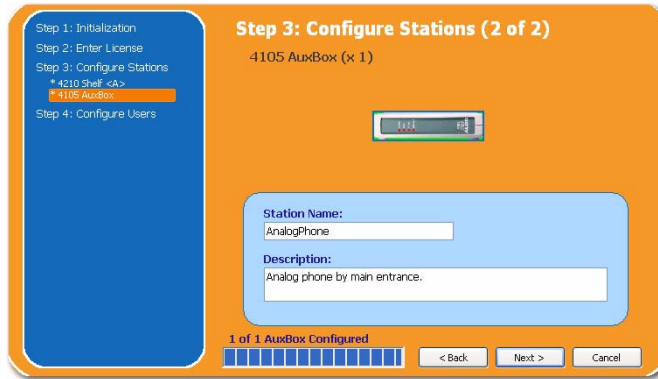
6. Enter the Station License Key when prompted. The Key can be found in the envelope included with your installation CD. The License Key entry screen can also be accessed from "Tools > License Management > Add License Key" menu. Note that if you have already entered license data previously, that license information will be displayed in the Current Available Licenses box.

Step 3: Configure Stations

7. Assign a name and description to each Station. Common names are the extension number ("Ext 105", "1024") or the telephone attendant's name or its function ("Greg's desk", "Reception"). In the Description field, provide a helpful description which makes it easy to identify the station. Once complete, click Next.

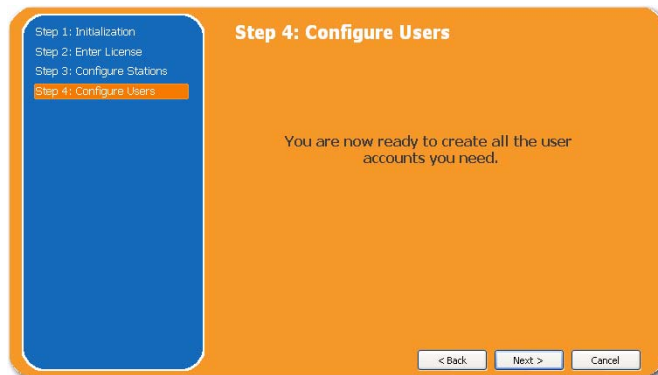


The System Wizard will graphically present the Stations it has detected on the PC you are configuring. In the above example, as might be the case with a typical Server PC, it presents a view of the ECR Shelf and provides an easy way to configure each of the stations. In the example below, a view of a desktop AuxBox is presented which would be more typical of a Client PC configuration.



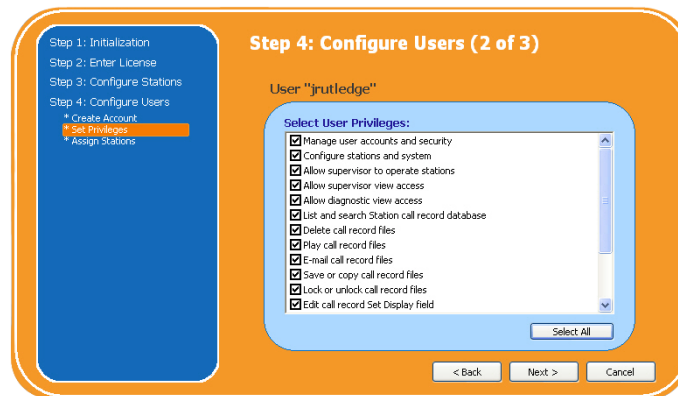
8. The System Wizard will continue to prompt you to add names and descriptions for every station it has detected on the system. Once complete, the wizard will advance to Step 4 - Configure Users.

Note that the Configure Users step can be skipped completely if ECR only requires the “admin” login to operate the system.

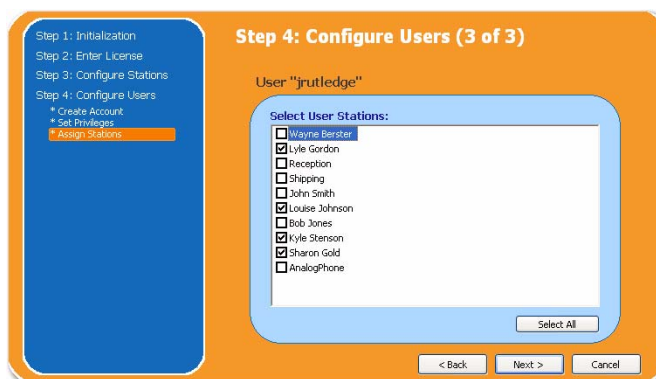


9. User accounts are required for Operators and Supervisors who will access ECR. Each user account can be granted specific privileges (e.g. the ability to play back call records but not delete them) unique to that account. Access can also be restricted to specific Stations (e.g. Operators can be granted access only to their own specific telephones, but not Supervisor telephones).

Enter the Username and Password of the User to be configured. Note that the password is case sensitive. Click Create User Account when completed.



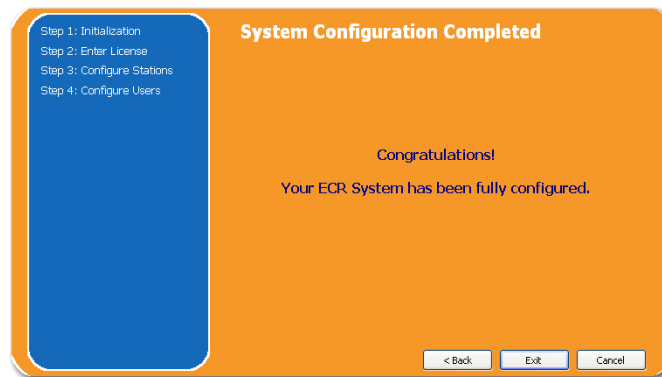
10. Select the privileges to be granted this User. Click <Select All> to quickly grant all privileges (as would be the case for a Supervisor User with full administrator access). Click Next when complete.



11. Select the Stations that the User has access to, then click Next.



12. Click the Create More Users button to create and configure more Users or click Next to complete the PC configuration.



13. Note: You must run the System Wizard on any PCs on the ECR system that have recording hardware attached to them.

Step 4: Test and Secure the System

ECR should be tested and secured once configuration is completed. Call records contain sensitive information that need to be secured properly to ensure privacy and limit liability. Please follow the following instructions to verify ECR is fully functional and secured.

Change the admin password

1. Using the ECR Configuration Tool, right click on the User 'admin' in the Users list in the main window. Select <Change Password> and enter the new password.



The 'admin' user has full access to all ECR features. Changing this password is essential to restrict unauthorized access to the system. Ensure that the new password is not lost otherwise software reinstall and configuration will be required.

2. Confirm all recorders are operational. Test each AuxBox or AuxCard by going off-hook on each connected telephone. Verify the telephone status (Ring, or Call in Progress), is reported in the ECR Supervisor Viewer. Listen to a sample recorded call to confirm audio is clear and of high quality.
3. Verify Client access to the ECR System. Access the ECR System by viewing a Station via the Supervisor or Station Viewer from the Client PC. Next, listen to a test call on the Client PC to confirm audio is clear and of high quality.



Important Security Notice. ECR cannot restrict access to the call storage directories directly via Window[®] interfaces. Specific security policies should be enforced on the ECR Server PC to ensure no unauthorized access to call storage directories.

Upgrade Installation Instructions

Upgrading is made easy with ECR version 2.3; the system configuration and call database are automatically imported from the previous installation of the software.

Follow the instructions below to upgrade ECR.

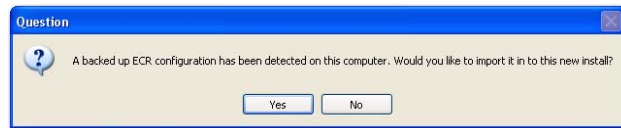
1. Run the ECR Installation from CD-ROM (or from the upgrade file downloaded from the Algo website). The upgrade process must be done first on the Server PC, followed by the Client PCs.

The installation program will run automatically from the CD when it is placed in the CD-ROM Drive.

2. If you are currently running ECR, the installation program will ask to shutdown the ECR, select Yes.
3. The 2.3 Installation program will next prompt to uninstall the previous ECR version. Select Yes to proceed. Note no call records will be deleted in this process.



4. Once the un-installation is complete, proceed with installation of new version as prompted by the Installation Wizard.
5. Select Yes when prompted to import backed up ("old") configuration.



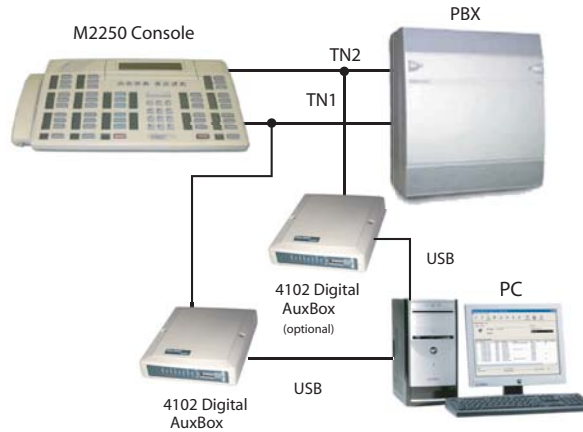
6. Re-start the Server PC when prompted.
7. Recorder firmware must be upgraded to take advantage of all ECR features. Note ECR version 2.3 offers a batch upgrade function to program all attached recorders.
8. Repeat Steps 1 to 7 for each Client installation (as required).
9. Test the ECR system as specified in "Step 4: Test and Secure the System" on page 16.

M2250 Console Configuration



The M2250 Attendant Console connects to the telephone system via a pair of TN links. As a result, two Algo recording devices (4102 Digital AuxBox or 4102R Digital AuxCard) are required to capture both call audio and Caller ID information from an M2250 console.

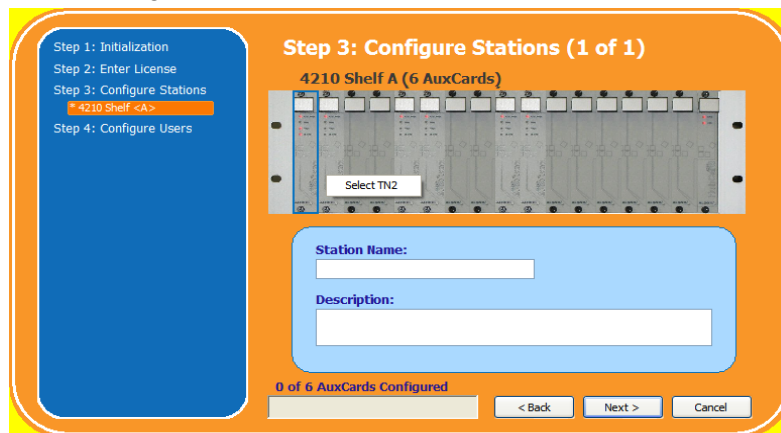
Typical M2250 Setup using Two 4102 Digital AuxBoxes:



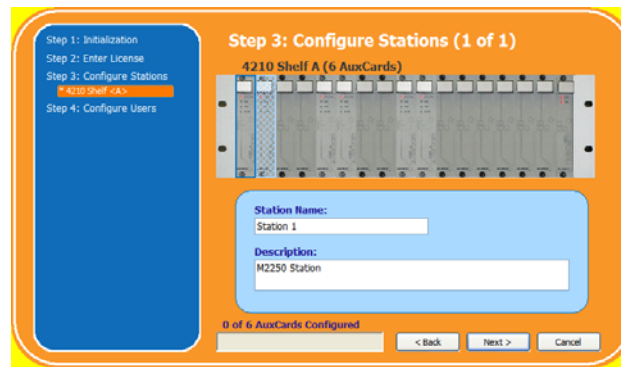
Software Configuration

Configuration of the recorder serial numbers is required for ECR to recognize the dual recorder M2250 configuration. Note, only one Station License is required for a single M2250 station. To configure, run the System Wizard from the ECR Configuration Tool on the PC with the AuxBox/ AuxCard hardware attached.

Step 1 After selecting the TN1 card (selected card in dark blue), right click on any other unassigned card, then click "Select TN2".



Step 2 The selected TN2 card will be shown in light blue. Fill all station properties fields and click Next to complete the setup.





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