Call Caddy

Installation and Reference Manual

Intelligent Recording

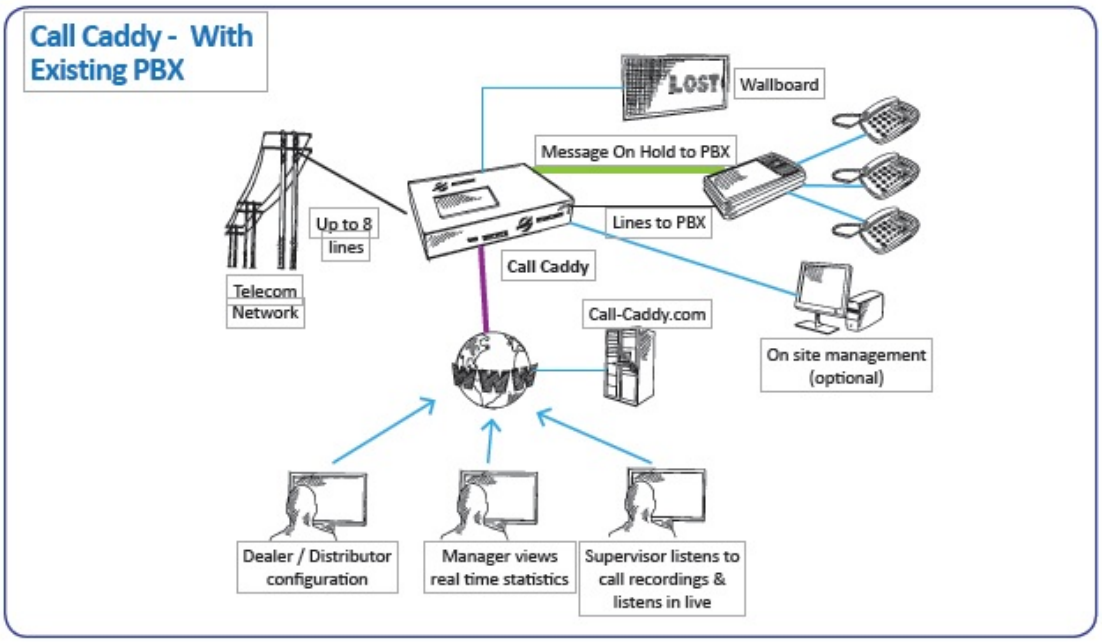
11/6/2013

Introduction & Overview

The Call Caddy provides a comprehensive Call Management and Control solution for retail stores, small call centers and many other applications. The professional grade hardware and software works by answering incoming calls to deliver professionally created messages, then holding the caller until staff can answer the calls as well other value-add offerings such as call recording, message on hold, wireless audio, and a wallboard display. The system can be used in conjunction with an existing PBX or as a stand-alone offering connected to single line or multi-line analog phones.

Call Caddy's call recording and management features allow full control of telephone related operations, helping reduce lost calls, increase revenue and improving customer service.

The Call Caddy message and control features are programmed through an online web portal interface. This document provides an overview of the online web portal and describes the basics of setting up the call processing application.



Why Call Caddy?

- Improve Customer Service
- Increase Sales through targeted and timely message delivery, ensuring your up-selling messages are delivered to your callers at the Right Time.
- Increase customer retention and operational efficiency

General Overview

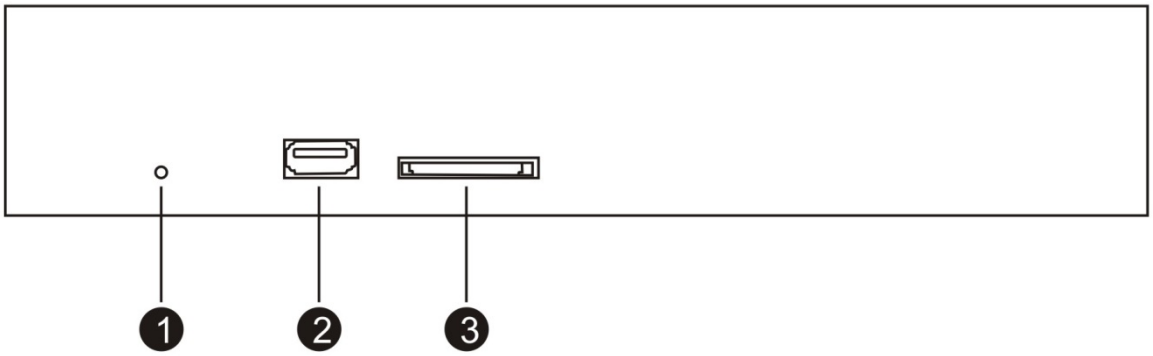
The key features of the Call Caddy are as follows:

- Supports up to 8 Analog Lines
- Built-in Auto-Attendant Functionality
- Internal Voice Mail box functionality
- Call Recording Standard
- Wallboard with Visual and Audible Alerts
- Message on Hold Source for PBX , remotely configurable
- Wireless Overhead Music Source

Technical Specifications

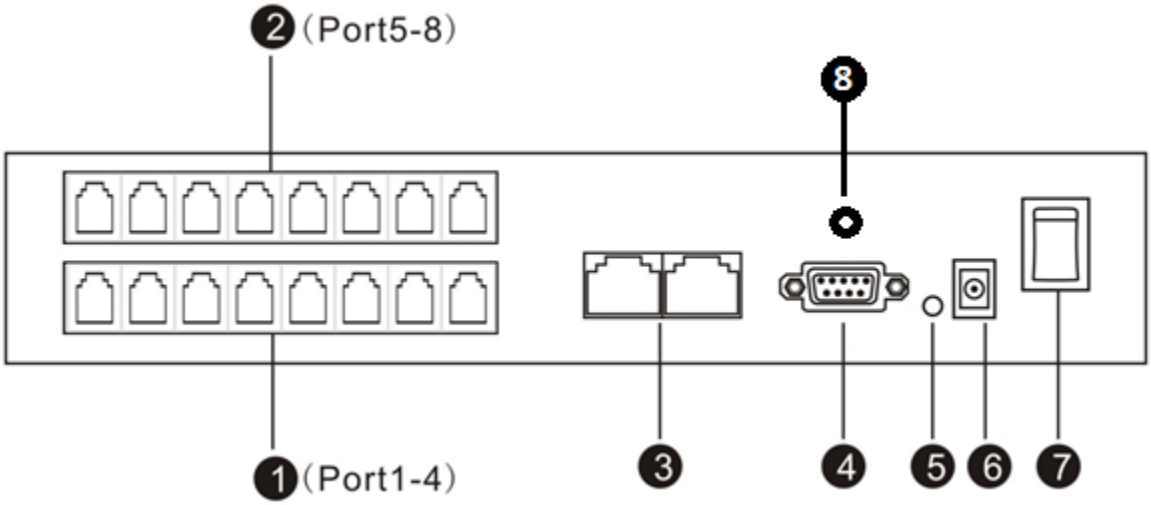
Item	Description
CPU	Core chipset – Samsung S5P6450 32bit ARM1176JZF-S RISC Microprocessor Clock Speed/Bus - 677MHz, 64 Bit Internal Bus Operating System – WINCE 6.0
LCD	Size 5" TFT Resolution 800 x 480 pixels Touch Panel - Resistive
On Board Storage Memory	SD Card up to 64GB (10,000 hours of call recording) HDD up to 2TB SATA (340,000 hours of call recording)
Caller ID Format Detection	FSK & DTMF Bellcore & BT SIN227
DTMF Detection	Included (Outgoing caller number, Auto Attendant menu, Caller ID)
Caller ID Regeneration	Call Caddy can regenerate Caller ID to PBX or phones in Promo Mode (where Call Caddy answers call before ringing PBX)
External Connections	Power – 19V DC 4.7A USB 2.0 Host 10/100 Ethernet RJ45 Audio out to PBX (MOH) 600ohm/8Ohm selectable Headset jack 3.5mm stereo SD Card (maximum 64GB) RS232 up to 115200 bps
Monitor of Audio	Internal Speaker 4W External headset Live stream via Ethernet (not on first release)
Development Environment	Compiler C++ Microsoft Visual Studio
Audio Storage & Playback Format	- PCM A law - PCM mu law - ADPCM - GSM 6.10 - MP 3 - Wav
Dimensions	250mm x 175mm x 45mm

Call Caddy Front



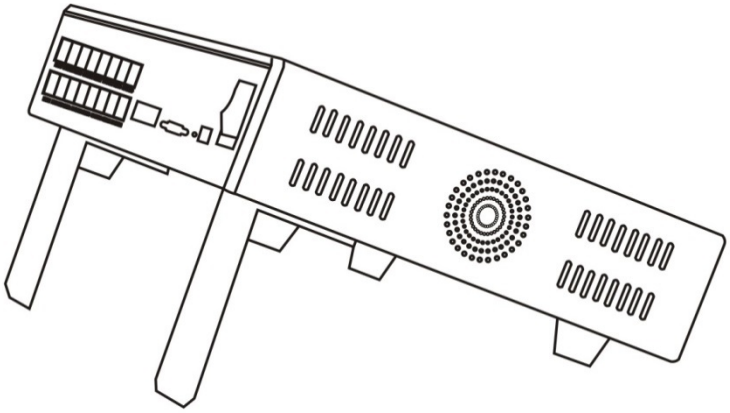
1. Power LED
2. USB port for backup or system upgrade
3. SD Card Slot

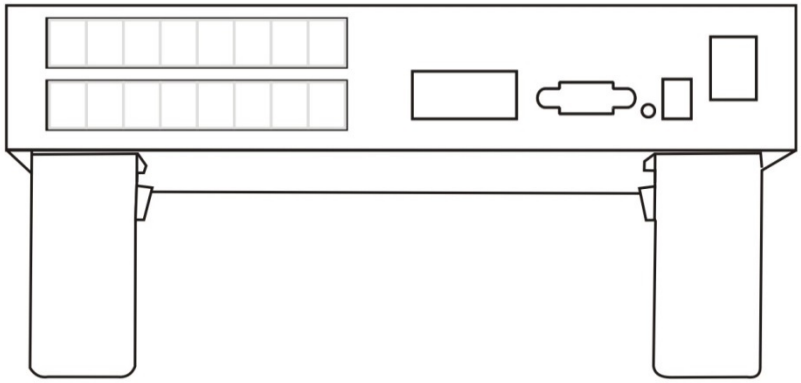
Call Caddy Rear

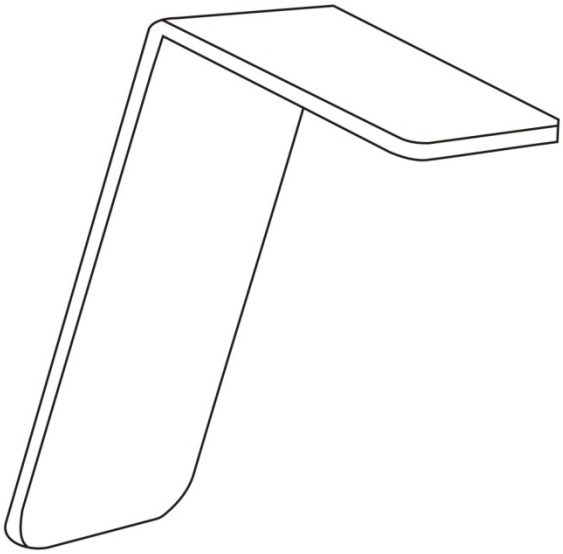


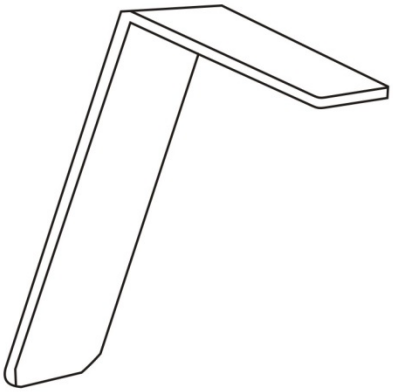
1 Card 1, Channel 1-4 (RJ11)
2 Card 2, Channel 5-8 (RJ11)
3 RJ45 Port x 2
4 RS232 Port for Wall Board Connection
5 RS232 data indicator
6 Power Input :DC-19V
7 Power Switch
8 Message on Hold Output to Phone System

Call Caddy Stand **(Remove Rubber Feet the Screw into Stand)**

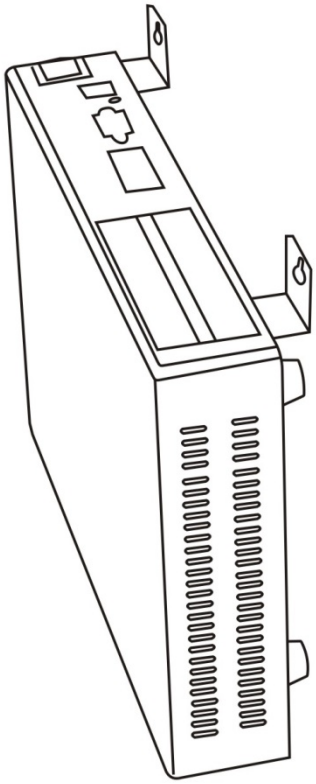


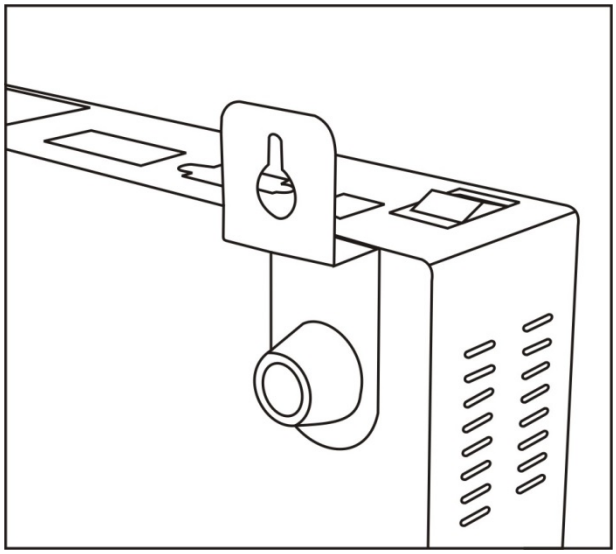


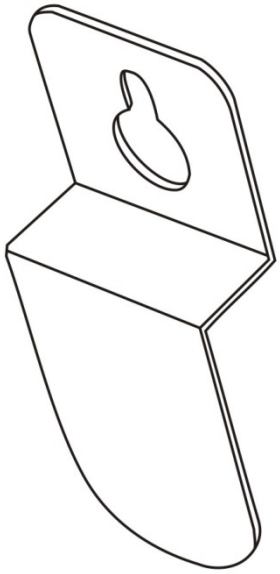




Call Caddy Wall Mount Brackets **(Remove feet then attach)**







I. Physical Connections

1. Making sure the power switch on the rear of the unit is set to the off position, then plug the Call Caddy into power using the supplied PSU and power cable
2. Connect the Call Caddy device to the network via the supplied RJ45 cable.
3. Connect the required number of analog lines to the device using the RJ11 supplied RJ11 line cables. The line ports are labels on the rear of the device and should be easy to locate.
4. Connect the desired number of operator phones into the RJ11 ports labeled PHONE “x”. “x” being the number representing the corresponding Line port. If connected behind a phone system, these may be input to the phone system as lines.

Note: It is critical that the lines are wired properly ‘In and Out’ , i.e. Line 1 into the Call Caddy is sent as Line 1 out to the phone system. Be sure to test all In/Out connections and wiring prior to putting the device into service.

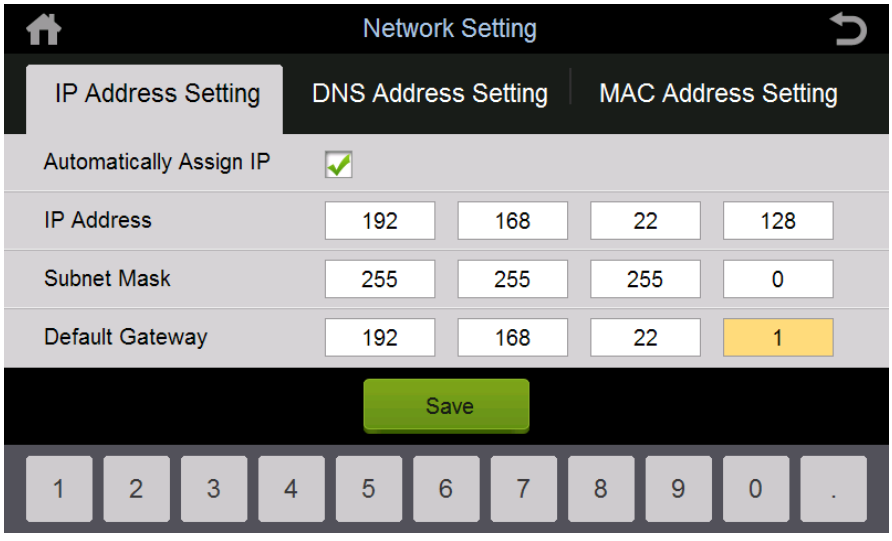
Once the device has been connected correctly, power on the device with the rear power switch. A short boot up sequence will complete after around 30 seconds.

5. Network Setup

The network settings have to be configured to allow the Call Caddy to connect to the control server. This allows the unit to receive periodic configuration updates automatically, including up to the minute live firmware updates to keep you up to date.

On the Call Caddy LCD, select “Settings” /“Network Setting”.

On the Network Setting page, three tabs will be available. On the IP Address Setting tab there is a check box option to allow automatic assigning of IP ,checking this box and pressing “Save” should be adequate to get the unit online. A manual configuration can also be entered if necessary.



If, after setting and saving your new configuration, the unit suddenly reboots after a few minutes please do not be alarmed. It is likely the device has located a newer version of the firmware on the remote server and is self-updating.

II. Call Flow & Web Set-Up

Account Setup

After purchasing your Call Caddy and you are ready to begin setting up the call processing application, contact Technical Support to have your online web account activated. You will be provided the website access URL and a user name and password. Once you have this information you are ready to begin.

Step 1 – Design the Call Flow

Begin by laying out the work flow of incoming calls. Consider how long the call should ring before the Call Caddy answers, the greeting that will be played when the call is answered, whether the phones should be ringing during the step, how many times to loop the step and what should happen when this step is complete. The example below shows a basic Work Flow template:

Step 1	**Step 2**	**Step 3**
Answer on 2 Rings (this allows Caller ID to be received) Play Initial Greeting Do Not Ring Phones	Immediate after Step 1 Play Hold Message Ring Phones Loop 3 Times	Immediate after Step 2 Play Take Message Caller Leaves a Message

You can have a single Work Flow Template that is used twenty four hours a day, or you can build multiple work flow templates based on your needs by time of day. You could have separate workflow templates for business hours, after hours, lunch, weekends etc.

Step 2 – Create Audio Files

Create the audio files that will be needed for each step of your work flow templates. The format for the audio files must be:

Codec - IMA-ADPCM
Sample Rate – 8000 Hz
Channels – Mono
Sample Size – 16 Bit
Bitrate – 32 kbps

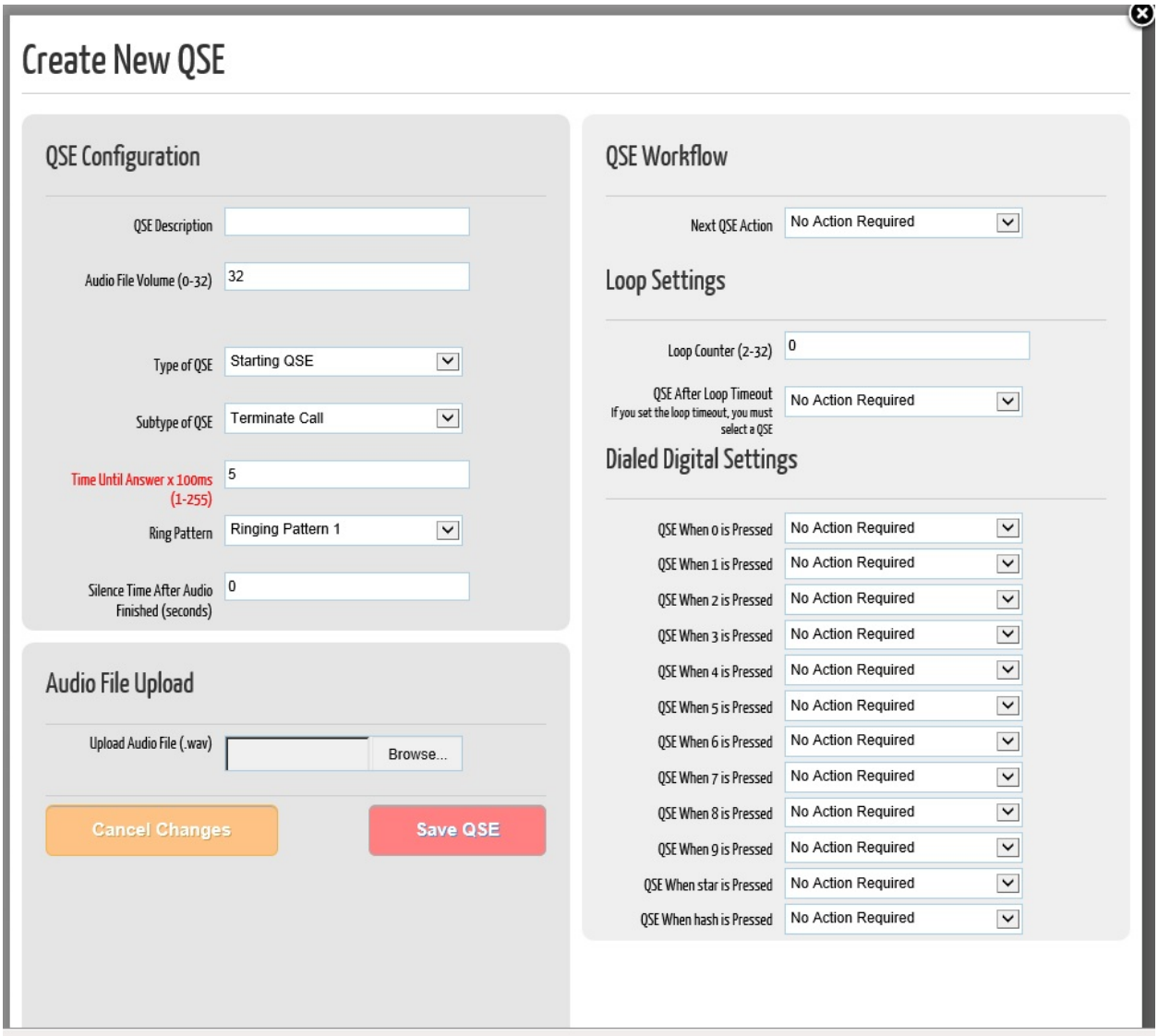
Step 3 – Create Your Queue State Elements (QSE's)

A Queue State Element (QSE) is a script that tells the Call Caddy how to process a call, what recording to play, and what to do with the call once the QSE has been completed. You will need to create a QSE for each step in your work flow templates. Simply put – a QSE is the functional representation of each one of the steps you have created in your work flow templates.

Log into call-caddy.com using the user ID and password you were provided.

There are pre-configured QSE's that have been loaded onto your customer account on the web portal. You can use these as they are, change them to meet your specific needs, or create brand new QSE's.

To create a new QSE or modify an existing one you will use the QSE form:



QSE Description – A unique name that you will give the QSE script to identify it

Audio File Volume – A value of 0 to 32 that can be set to adjust the playback volume of the audio file associated with the QSE

Type of QSE – used as follows:

Starting QSE – the beginning of the QSE workflow chart, always use a Starting QSE for incoming calls to answer the call

Transitional QSE – any step of the workflow other than Starting or Terminating a call. Example – a Starting QSE will next go to a Transitional QSE as the 2nd step.

Terminating QSE – used only when terminating the call at the end of the step is desired.

Subtype of QSE: This defines the action of the step as follows:

> **Backup Mode**: This type of QSE will play the audio file and ring the phones while the audio file is being played. When the call is answered the audio file stops playing
>
> **Promo Mode**: This type of QSE will play the audio file and does not ring the phones.
>
> **Take Message Mode**: This type of QSE is used when taking a voice message at the end of the work flow is desired.
>
> **Terminate Call**: This type of QSE is used when you want to play the audio file for the QSE and then terminate the call without taking a message at the end of the step.

Time Until Answer – This is the amount of time in 100 millisecond increments that the Call Caddy will wait to answer an incoming call. This is only used for Starting QSE's.

A note about Caller ID – the telephone company transmits the caller id information between the 1st and 2nd ring cycle on an incoming call. If you want the Call Caddy to capture Caller ID you will need to set this timer so that the call is answered after the 2nd ring. In the US this time is typically between twelve and fifteen seconds.

This value is entered in millisecond increments – so if the desired setting is 12 seconds the correct value to enter would be 120 (adding a zero to the end of the actual number of seconds required will be the correct value for this field).

Ring Pattern – the ring pattern can be adjusted as required on the Device page and is set with this value. The default values simulate a standard North American ring cycle.

Silence Time After Audio – this value is the amount of silence in seconds after the audio file is played and before going to the next QSE.

Audio File Upload – Browse to the audio file that was created for this QSE and select.

Next QSE Action – specifies the next QSE step to take once this QSE is complete. If you intend to loop this QSE multiple times leave this value "No Action Required". If you will not be looping the QSE audio file then select the next QSE step from the dropdown list.

Loop Counter – specifies the number of times to loop the audio file before going to the next QSE. The minimum value of 2 in this field will play the current audio file 1 time. Values greater than 2 will play the audio file multiple times before proceeding.

QSE After Loop Timeout – if you have selected to loop the QSE audio file then use the dropdown to select the next QSE step from the dropdown list.

Dialed Digits Settings: Any digit that is depressed during playback of the QSE audio file can be directed to another QSE – example “Press 1 for directions to our office” could be used to direct to a QSE that plays directions. Leave at “No Action Required” if not used.

When all settings are finished click the ‘Save QSE” button in the bottom right hand side of the page.

It is recommended that you create your QSE’s working from the end of your workflow template to the beginning so that you can select the transition QSE as you work forward in the work flow template.

Step 4 – Create Your Timetables

The timetable is used to assign a QSE to a specific time period of the day. The example below shows a business that is open Monday through Friday from 8:00 to 5:00 PM. During business hours a Starting QSE has been selected, during closed hours a QSE has been selected that will play a message advising that the office is closed and then takes a message.

To modify the existing Timetable on your account, or to create a new Timetable:

When creating or modifying a Timetable:

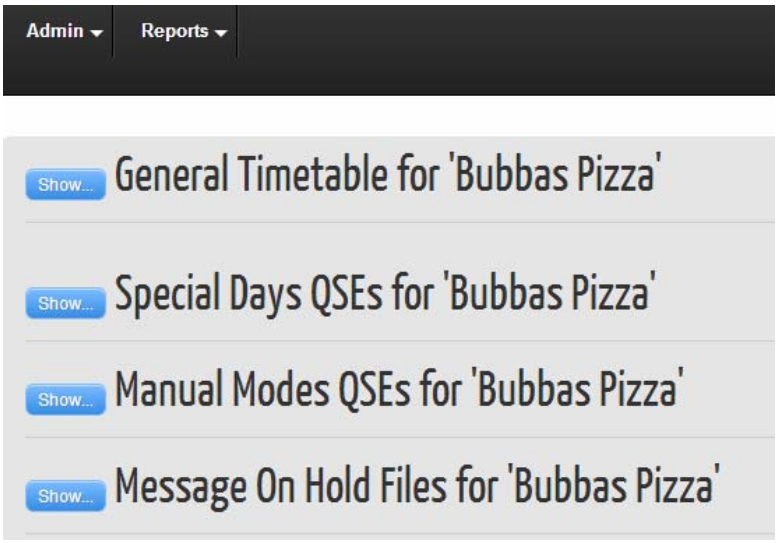
Each day must always begin at 00:00 and proceed through the day with each timed step.

Select the QSE to assign to each starting time by clicking the “Change” button. You will be given an option to select this QSE for all days within that start time.

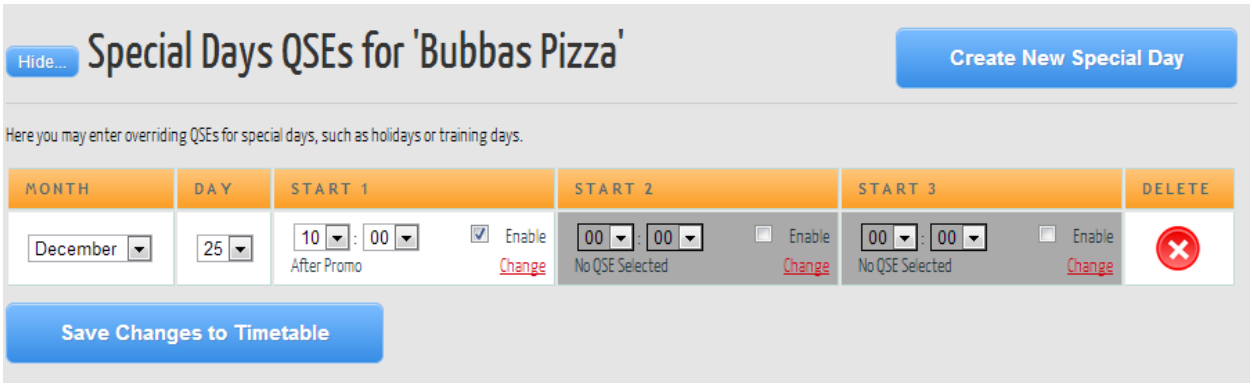
For Start Times 2 and beyond, set the start time for that period (Start 1 must always be 00:00)

When completed click the “Save Changes to Timetable” Button.

Other options available within the Timetable programming:

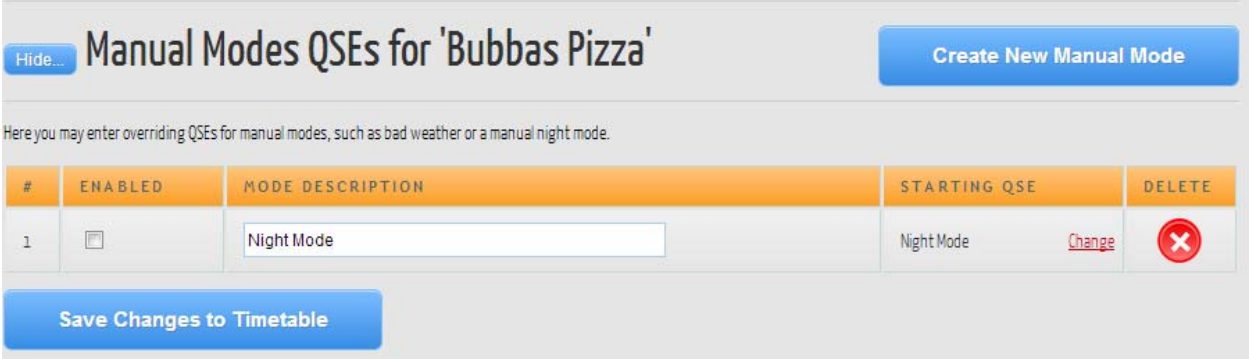


Special Days QSE’s – This option can be used to schedule specific QSE’s and messages for a specific day of the year – ie – holidays.



Manual Mode QSE’s – Manual Mode QSEs provide the ability to over-ride the current QSE for any reason. These can be setup in the case of a weather emergency that prevents normal business operation, a training period etc. Once the QSE’s are set up, they can be activate/deactivate directly from the touch screen of the Call Caddy, by selecting Settings>Call Caddy Setting > then selecting the desired Manual Mode QSE. You can have up to 10 Manual QSEs assigned.

Once a Manual Moe QSE is set, it must be manually removed from the touch screen or web interface. The screen shot below shows a manual QSE, to set it as active via the web interface, check the enable box.



Message on Hold Files – The Call Caddy can serve as a Message on Hold source for a host PBX. The physical connection is made between the Call Caddy device and the PBX via the 3.5 mm output on the back of the Call Caddy, into the MOH input of the PBX. This ensures that if callers are put on hold after exiting the Call Caddy call flow (by being answered by a phone) that promotional messages will still be heard by the caller.

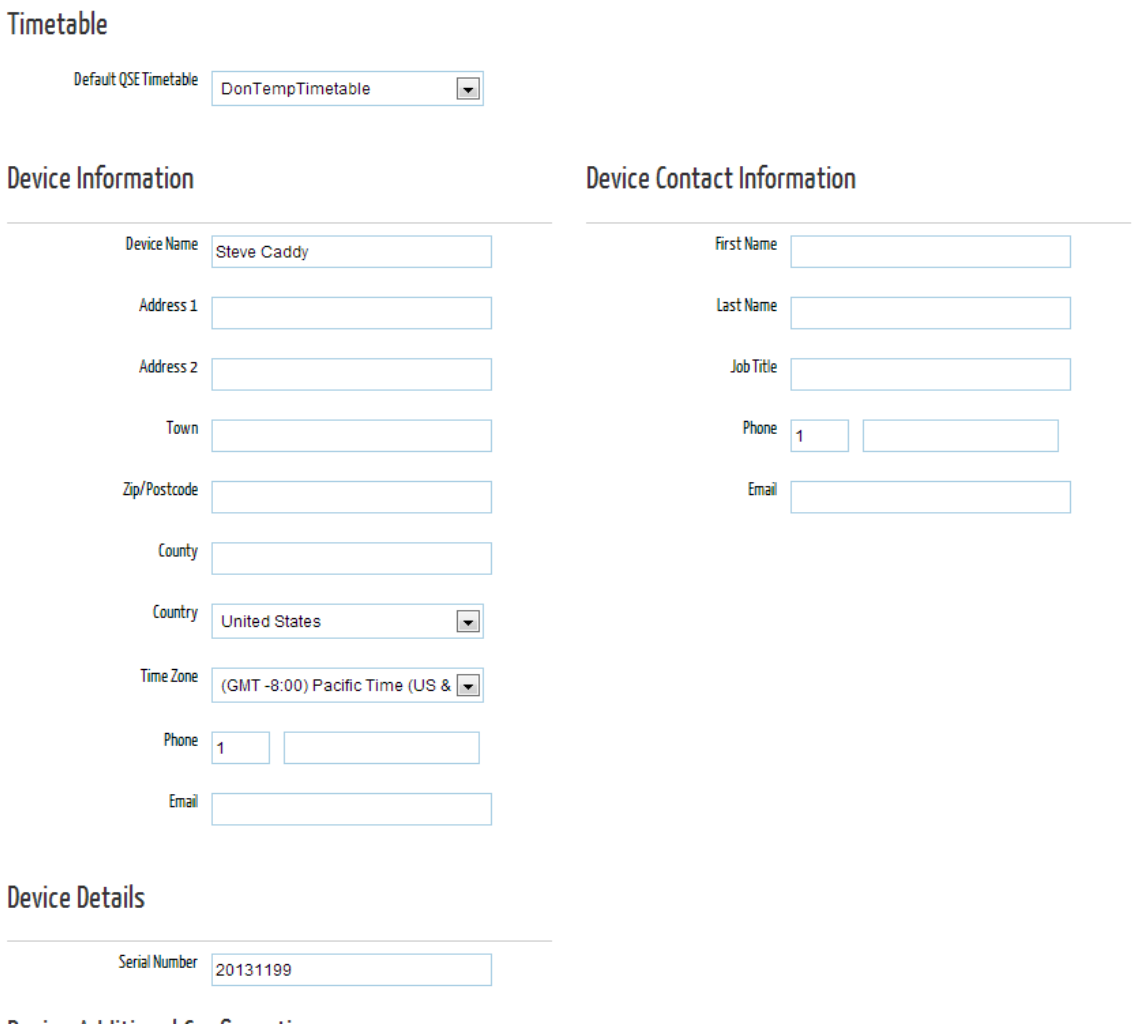
As shown below, up to 5 different start times can be activated to play 5 different audio files if desired.

Step 5 - Assign Time Table & Edit Device Details

After the QSE and Timetables have been set up, it is then necessary to assign them to your device as well as adjust other settings that may vary by location.

To edit the information about the device and adjust these settings, click on the device name that appears next to the serial number as shown below:

Default QSE Timetable - The first step is to assign the time table to your device. Then enter the appropriate contact information:



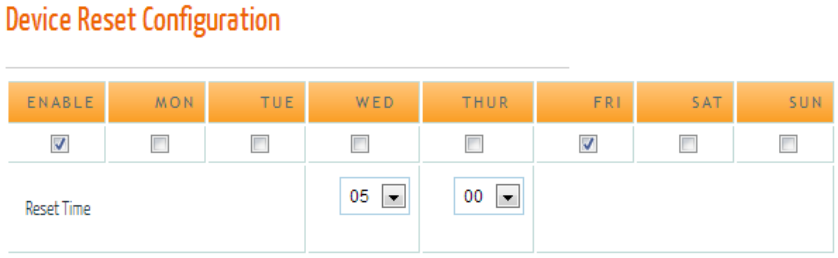
Device Additional Configuration- This sets a number of important default settings on your device.

Extension Caller ID Type- set to Bell FSK for USA, ETSI FSK for UK/Europe.

Line Break Timer - USA suggested setting = 200. UK suggested setting = 100

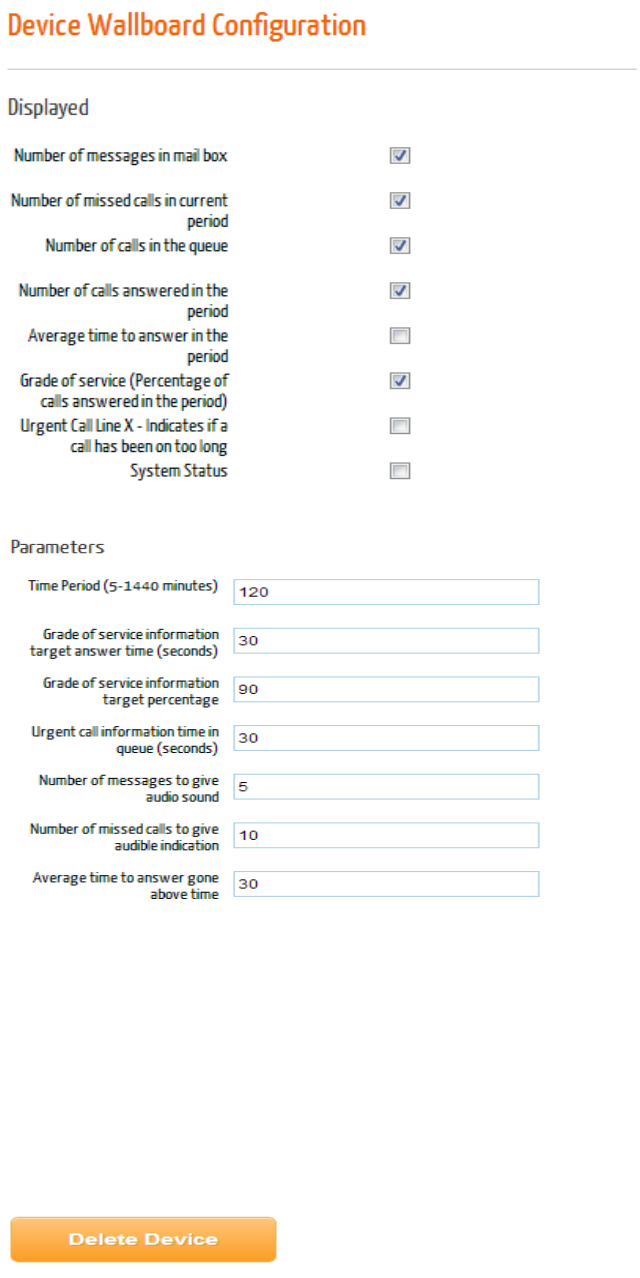
Important Note: This setting detects if a caller has hung up while being processed. If this setting is set improperly for your lines, calls can be dropped while being processed by the device or in the case where a caller hangs up and it is not detected, phantom ringing can occur. (If calls are dropped while in process lengthen the timer, if phantom ringing try shortening the timer.)

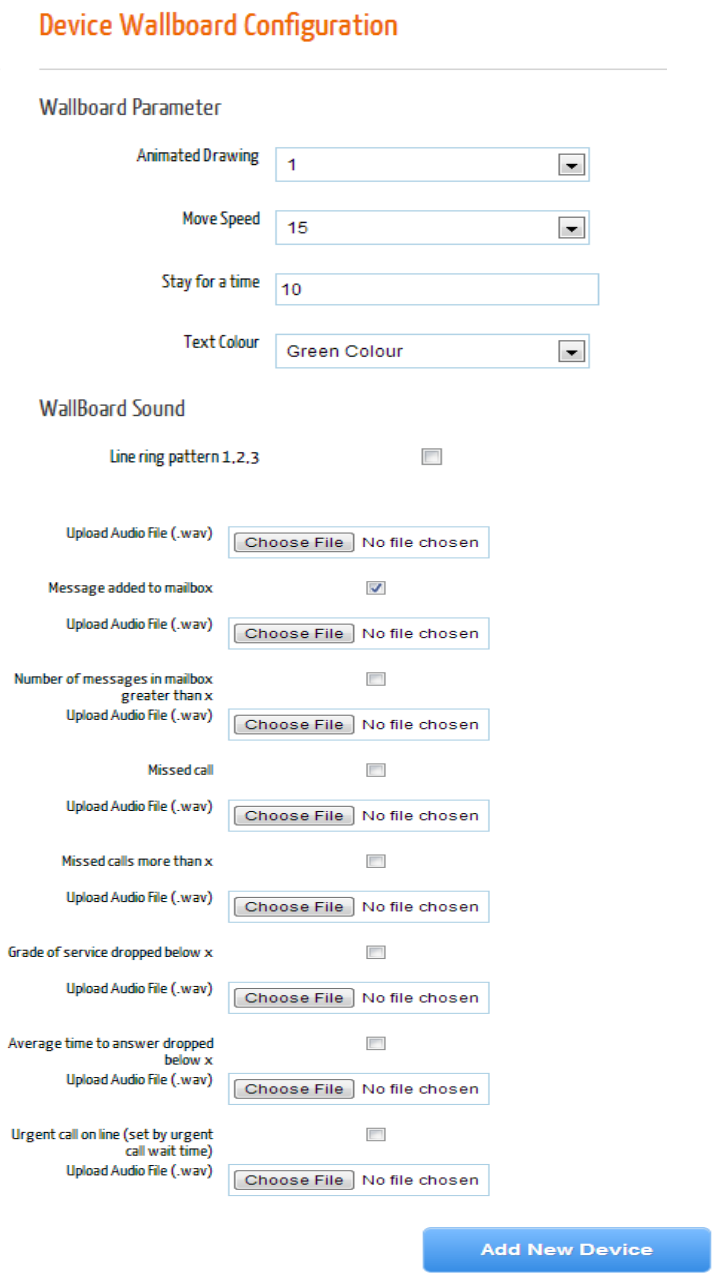
Ring Type Settings - allows you to set different ringing pattern options. When a call is sent to a phone from a QSE, the ringing pattern of the phone can be programmed to ring with one of three different patterns. This ringing pattern can identify information about the caller. For example, a menu option to press 2 for Spanish can cause the phone to ring with a different pattern, alerting a Spanish speaking employee to pick up the call.



Device Reset Configuration. In default the device is set to reset once a week. It is recommended that the device be reset at least once a week, this timer allows the user to set when this occurs.

Wall Board Settings (Optional) - If using the optional wall board, settings and alarm indications can be set now, or the installer can return to adjust after installation. The wall board can be used for both visual and audible notifications based on the criteria shown below:





III. Call Touch Screen Operation

The touch panel provides easy and immediate access to the more base functions of the Call Caddy device.

Universal Functions

On every menu a “Home” button is present on the top left of the screen. This provides a quick route back to the root of the main menu. A “Back” button is also incorporated into the top right corner of the display. This button reverts the user back to the last menu they were on. Multiple presses will eventually return the user back to the main menu.

CDR (Call Detail Record)

The CDR provides access to call related information. The information is divided into 6 tabs:

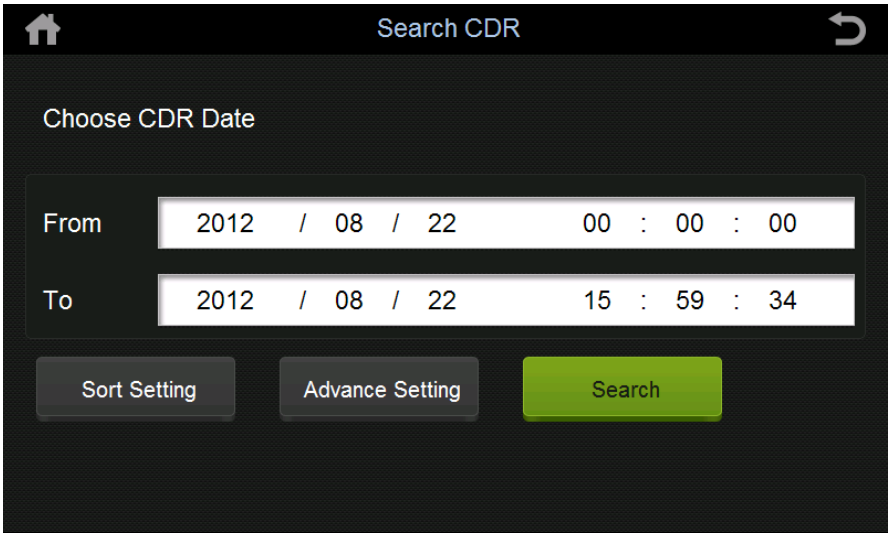
- **All**
  A record of every event currently contained within the devices memory. The information includes Caller ID, a timestamp, duration of call and an ability to flag the call as important.
- **Outbound**
  A record of all outbound calls. The information includes Caller ID, a timestamp, duration of call and an ability to flag the call as important.
- **Inbound**

A record of all inbound calls. The information includes Caller ID, a timestamp, duration of call and an ability to flag the call as important.

- **Missed**
  A record of all missed calls. The information includes Caller ID, a timestamp, duration of call and an ability to flag the call as important.
- **Recorded**
  A record of all recorded calls. The information includes Caller ID, a timestamp, duration of call and an ability to flag the call as important. Selecting a recorded call also allows the user to listen to its contents, via the Call Caddys built in player.
- **Important**
  All calls that have have been marked as important are available to view here.

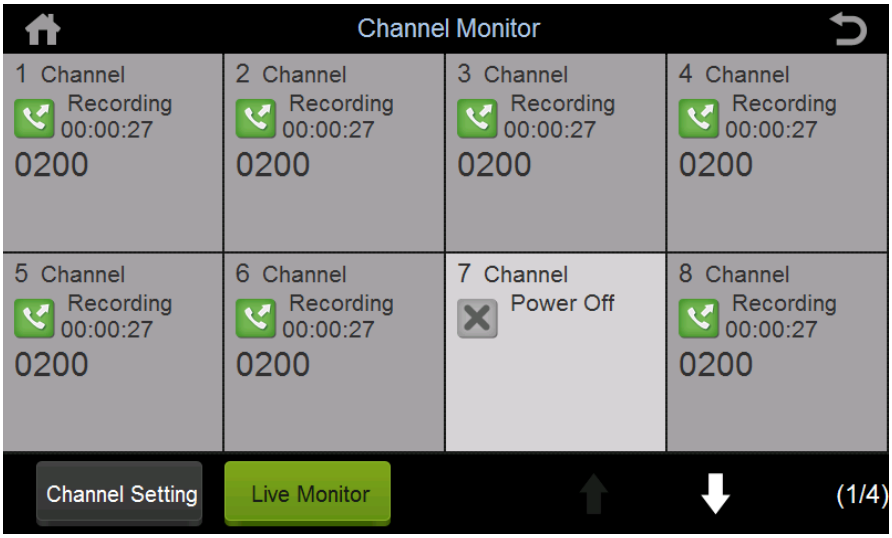
Search

The search function allows a user to find calls using specific filters. The main filter is a function of timestamps, allowing retrieval of calls between two specific points in time. Further filters are available via the “Sort setting” and “Advance setting” menus. These menus are designed to work in conjunction with one another whereby a filter selection within the “Sort Setting” menus requires a relevant value to be inputted into the “Advance Setting” menu. It is recommended that any detailed searches be done using the Call Tracker manager software.



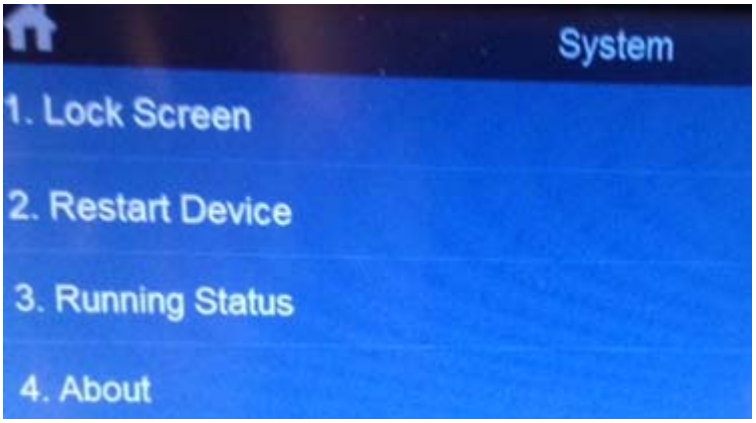
Monitor

Live call monitoring is possible from here. Each line is represented by a box containing the Line ID (1,2,3,4 etc.), Line Status (Power off, Idle, Active etc.) and a readout of the current line voltage.
By selecting an active line a user can listen in on a live call and control the volume level emitted by the Call Caddy's built-in speaker using the plus and minus buttons situated in the bottom right of the menu. The current volume is depicted as a percentage between the up and down volume buttons.



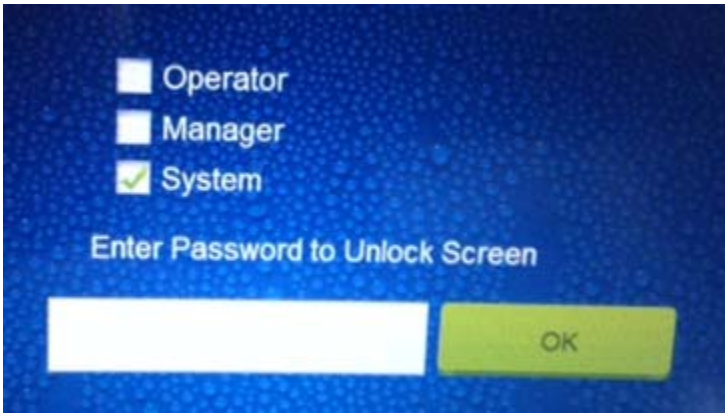
The Status menu shows the current condition of each line. The Icons will change depending on the line status.

System



1. **Lock Screen**

   This locks the screen, log-in is required to access once locked. There are 3 different log-in types as shown below:



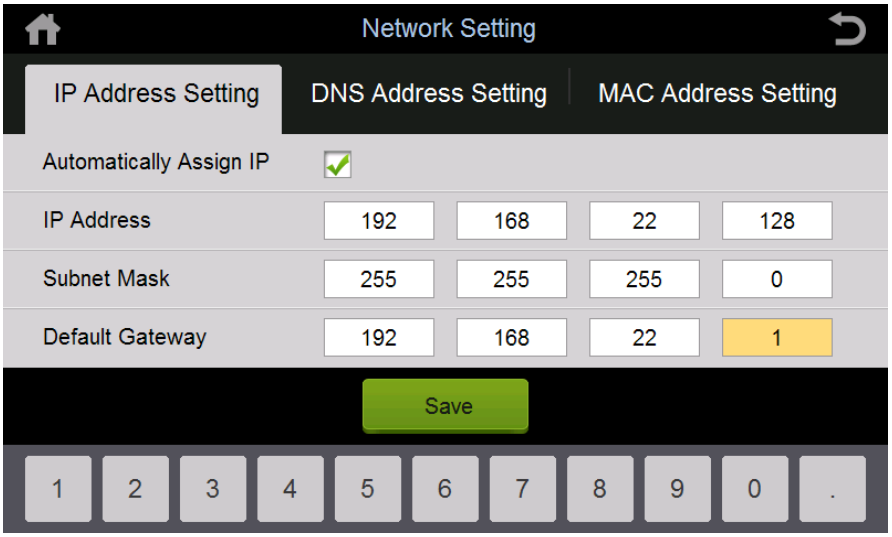
By default, the passwords to unlock are:

Operator = 1111 (access to only Manual Modes and VMsg)
Manager = 2222 (access to everything except Settings and Tools)
System = 3333 (access to all)

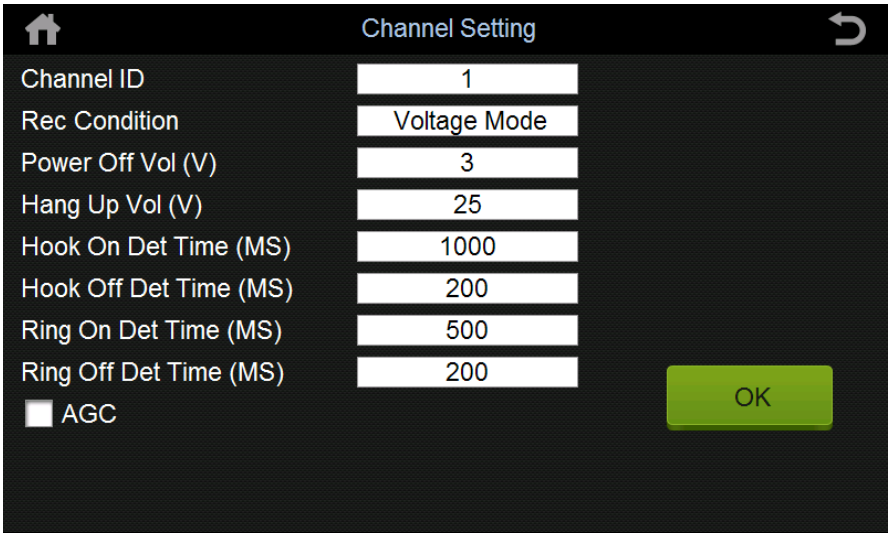
2. **Restart Device**
   Manually triggers a system restart.
3. **Running Status**
   Provides information on “Running Hours”, available storage space and the time and date of the last reboot.
4. **About**
   Product information about the device, including serial number.

Settings

1. **Network**
   Here the TCP/IP settings can be configured. By default, the device will use DHCP to automatically assign an IP within your networks range. The device can also be manually configured for better control.



2. Channel Setting



2.1. *Channel ID* - Allows select of which channel to modify

2.2. *Rec Condition* - Selects what method the device uses to decide when to record. By default the condition is set to voltage. This will be suitable for the vast majority of analog lines. Other conditions include VOX modes (whereby a decibel level trigger decides when to stop and start recording, and a continuous recording mode)

2.3. *Power Off Vol (V)* - The voltage level whereby call caddy powers off a line.

2.4. Hang up Vol (V) - The voltage level whereby call caddy hangs up a call.

2.5. Hook on Det Time (MS) -

2.6. Hook on Det Time (MS) -

2.7. Ring on Det Time (MS) -

2.8. Ring off Det Time (MS) -

2.9. AGC - (Automatic Gain Control) attempts to dynamically alter the volume of a call in progress to achieve the most consistent overall volume level possible.

3. System Setting

a. System Date - Set the time, date and display format.
b. Language - Set the language. Current options are English and Mandarin.
c. Screen Brightness - Modify the brightness level of the LCD screen.
d. Other setting - Enable Touch sounds and select if the device should automatically enter the monitor screen from the main menu in the event of a line becoming active.

4. **Screen Lock Setting**

   Screen Lock Setting is a security measure that provides the option of setting a password to unlock the screen.

5. **Device Parameter**

   This allows for the setting of 'Break Line Time' or line break disconnect. This can be a critical setting and can also be adjusted through the web server. It is suggested that this NOT be changed unless directed by your provider.

6. **User Management**

   This section is where you can change the default passwords if desired.

   Operator = 1111 (access to only Manual Modes and VMsg)
   Manager = 2222 (access to everything except Settings and Tools)
   System = 3333 (access to all)

Tools

1. **Upgrade Firmware**

   If a firmware update is available on either the units SD card or on a USB flash drive connected to the unit, this menu will allow for manual updating.

2. **Backup Files**

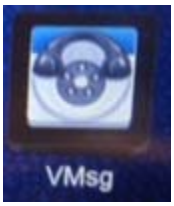
   Allows for a time scale whereby the unit will backup calls to memory. The options are Daily, Monthly, Yearly or between two specified dates.

3. **Touch Screen Calibration**

   Allows the use to adjust the calibration of the touch screen.

Manual Modes

This allows the local manager to manually over-ride any existing QSE operations by activating one of up to 10 Manual Mode operations. The Manual Mode QSEs need to be preconfigured and assigned to the device in order to function.



VMsg

All voice messages can be accessed via this menu. Selecting a message will start the playback of that message on the devices built in player.

IV. Call Caddy Call Recording & Other Call Caddy Settings

Call Tracker Manager Software Requirements

The Call Caddy recording module is referred to as Call Tracker. The Call Tracker Manager software allows for complete management of recordings as well as the programming and customization of the recording features of the Call Caddy. The Call Tracker Manager software is designed for both on-site management and for accessing calls from remote locations.

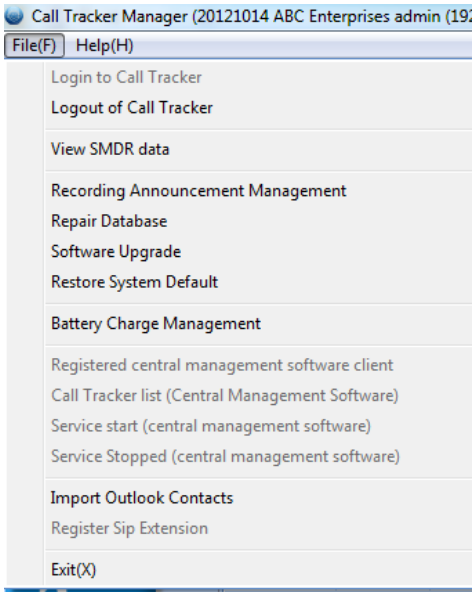
Important Note: Even if you are not planning to use call recording, there still may be a few setting changes required using the Call Tracker manager software. These include off-hook Min Voltage level and power off Max Voltage

PC System Requirement:

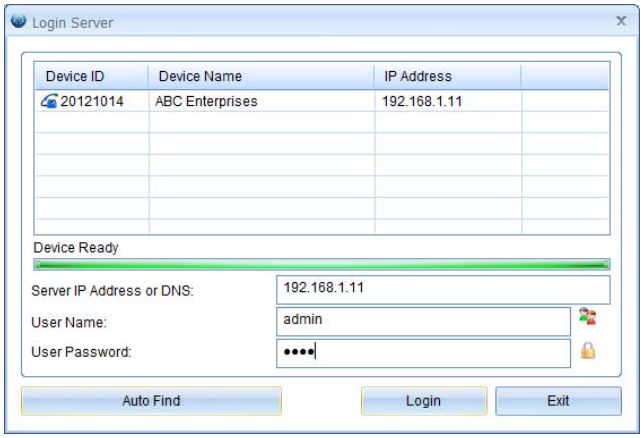
Windows7/Vista/XP/2000	1GB HDD
Pentium 400MHZ CPU	Network RJ45
256MB RAM	Audio output (Play & Monitor)

Main System Menu

The Main System Menu provides access to many of the core system Features of the Call Caddy System as well as restore, upgrade and repair issues with the recorder system.



Log-In to Call Caddy



Same Local Area Network Connection

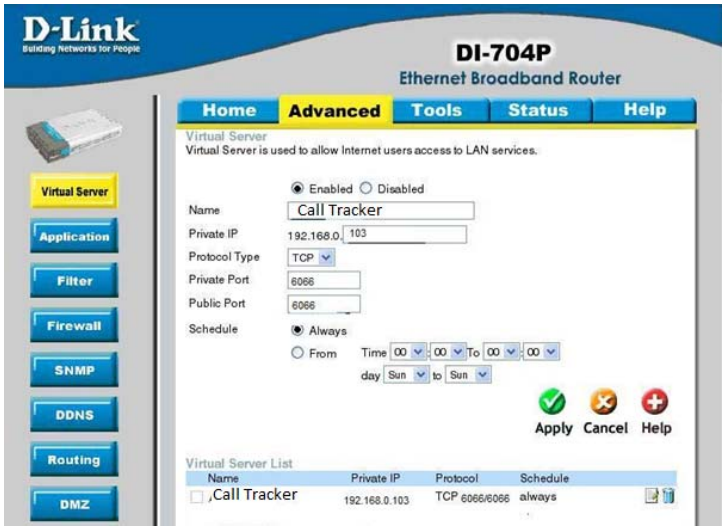
First, select Auto Find, this will find a Call Caddy located on your same network. Next, select the device and enter the user name and password, this will connect to the Call Caddy that is installed on the same Local Area Network.

Name: admin

Password: 1111

Remote Connection

If the Call Caddy is located on a different network, you can log in remotely using a Static IP Address or if used behind a router, you will need to setup Port Forwarding to enable remote access.

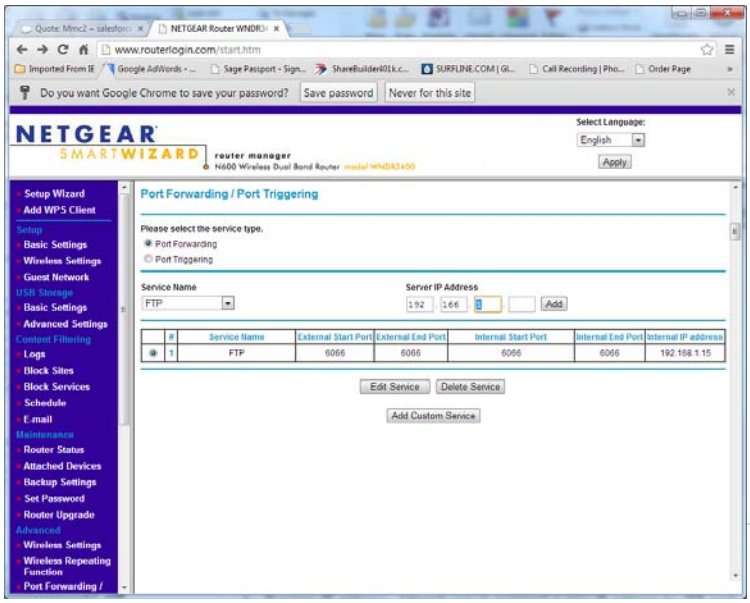


Protocol Type: TCP

Private/Public IP sharing port: 6066

From the example on the left, the IP sharing can be configured as a virtual server (some routers call this Port Forwarding). This allows remote access to a specific port on the Local Network from a remote location and automatically redirects the log-in to the Call Caddy. (in this case Call Caddy 192.168.0.103 in the LAN).

Port Forwarding Set-Up Example



WAN IP address

To locate your IP Address, you can visit the following web site from a PC on the network:

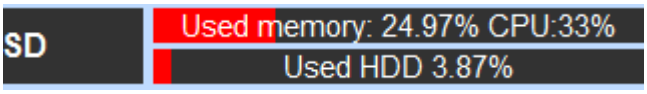
http://www.whatismyip.com/

If you need assistance setting up port forwarding please contact your IT Professional or Router provider.

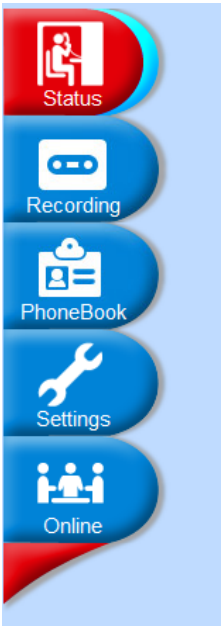
Main Tool Bar

The Main Tool Bar is used for Log-In/ Log-Out as well as to change the language of the program. The Red Banner identifies the area of the program you have as a current active window, in this case the Status window is active:

Memory Usage on SD Card or Hard Drive, and CPU Utilization



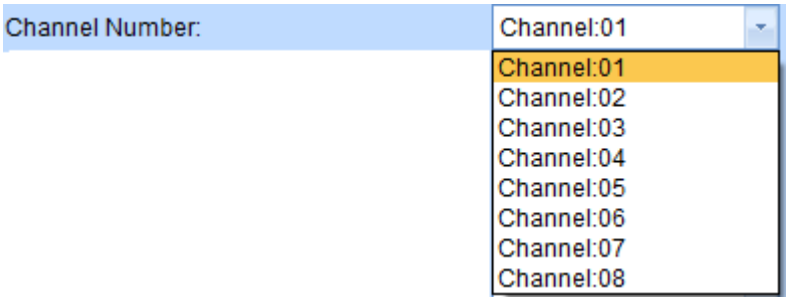
Access Panel



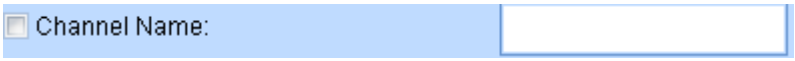
The access Panel is used to navigate to the different sections of the Call Caddy manager program. These are used to monitor channels, listen to recordings as well as program and customize the device.

Activate Call Recording - To Program the Call Caddy to Record calls, the installer needs to configure the Channels to Record, this section outlines and describes these settings.

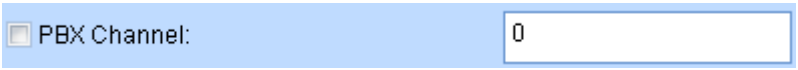
Channel Parameters



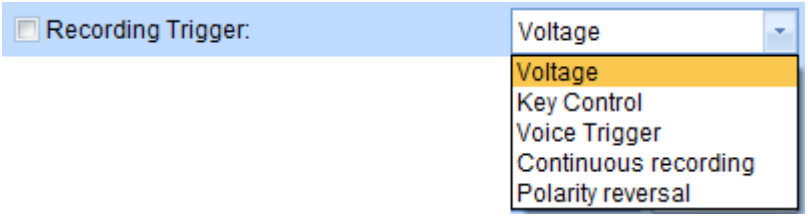
This section is for setting parameters that are unique to each channel on the Call Caddy system. Be sure to first select the Channel Number from the drop down list. The settings are unique to each Channel.



You can create a name for each channel. The name will be included with the recording file, it also will be shown on the monitor view.



This parameter associates the Channel with the Line on the Phone System



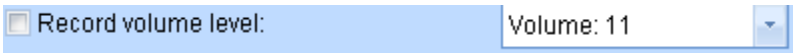
Voltage: For Analog CO Line Recording

Key recording: Manually recording by press DTMF key while on a call. Refer system setting hot keys (p.34)

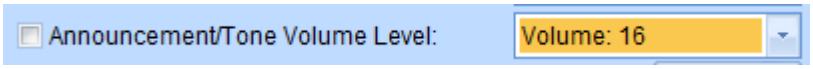
Voice trigger: This setting is used for recording Radio Channels, Microphones or Handset Taps. DTMF signal will not be recorded.

Continuous Recording: This setting provides Non-stop recording, it is usually used for a microphone. DTMF during the call will not be recorded.

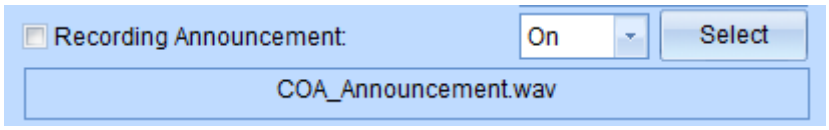
Polarity Reversal: Start recording when polarity reversal signal is received. Check with your telephone line provider if this is provided (not common).



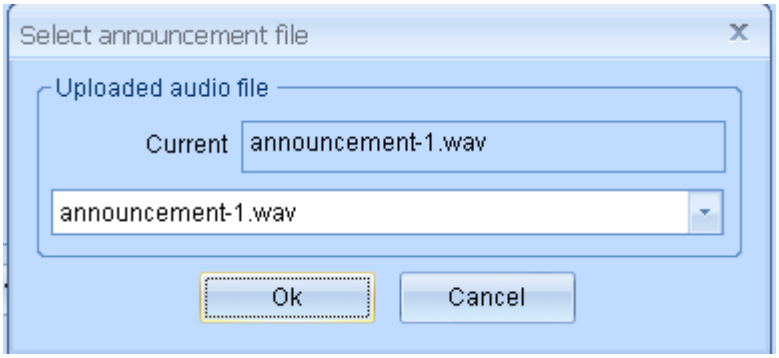
This provides a manual adjustment on the channel for recording volume. If Recording on CO lines using Voltage Trigger , suggest selecting AGC option (auto gain control).



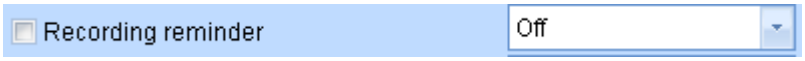
This determines and adjusts the default volume of recorded announcements and tones (if activated) played to both sides of the call when activated.



Enable/Disable recording announcement that will be played to both sides of a call and it will be saved in the recording file.

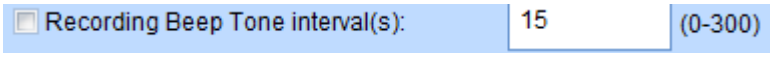


Choose from uploaded announcement files.

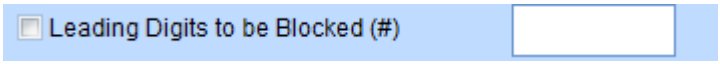


Enable to play beep-tone recording reminder to both sides during a call.

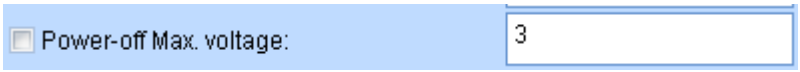
Reminder file " rec-remind.wav" is less than 2second and cannot be modified.



Time between beep tones of recording reminder

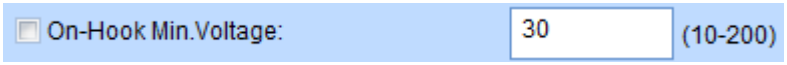


Allows blocking of leading digit(s) on a call, ie. If you dial 9 to access an outside line, you would block 1 Digit to remove the '9' as a lead digit on an outbound call.



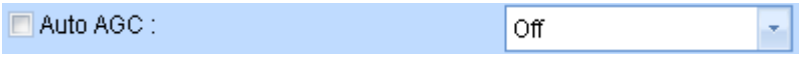
This is voltage level to verify if the channel is connected to outside line.

Recommend: 3V



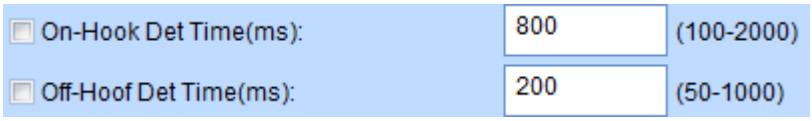
This is minimum voltage setting to determine On-Hook status of a line.

Recommend: 25V



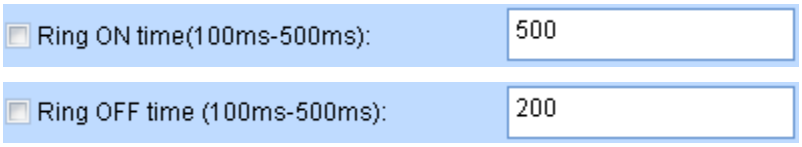
AGC: Automatic Gain Control, this balances both sides of the recording to increase recording quality.

Recommend: Disable this function if using Voice Trigger recording, enable for Voltage Trigger.

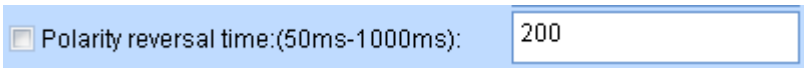


Time elapse setting for specified voltage of ON/OFF hook.

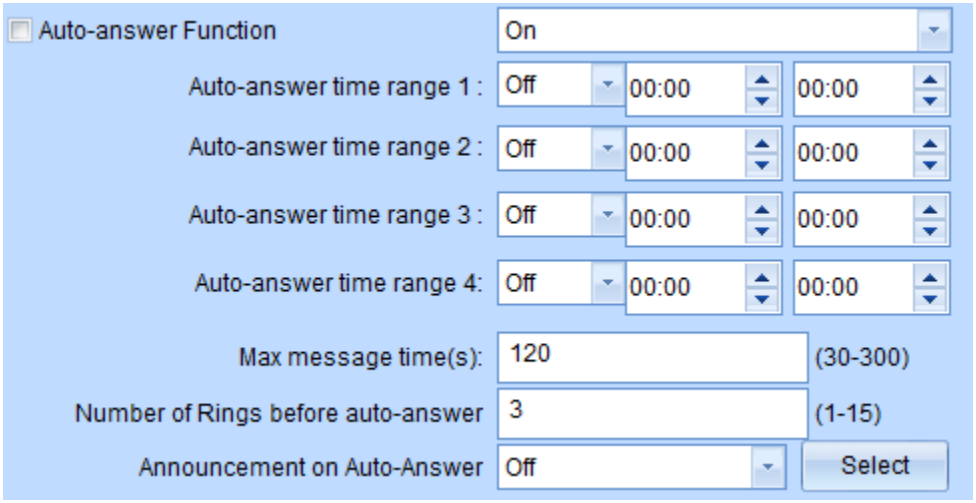
Power on: <value
Power off: >value



Time setting for specific voltage to verify ringtone ON and OFF.

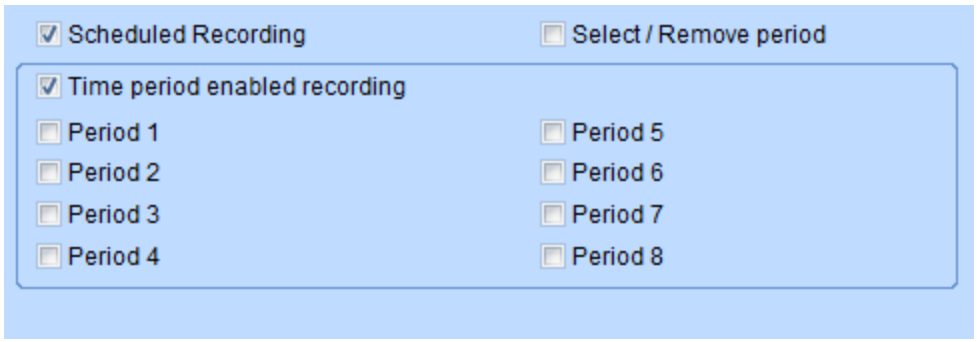


Defines of polarity reversal duration.



Channel Auto-Answer- a separate setting to the system-wide setting that determines days when the auto-answer feature will operate, this allows for Auto-Answer during non-work hours on business days.l

Set Time Frame(s) , then choose announcements from uploaded files.

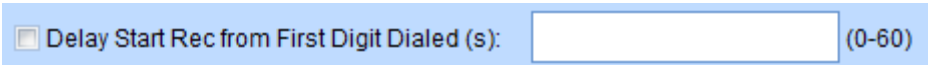


You can select certain times of the day per channel to start and stop recording. The time periods are set in the Scheduled Recording Tab.

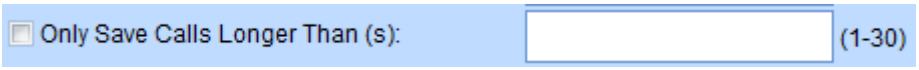
System Parameters

These settings are system-wide settings, shared by all channels. To update a specific setting, check the box next to the setting and then click on update in lower right corner.

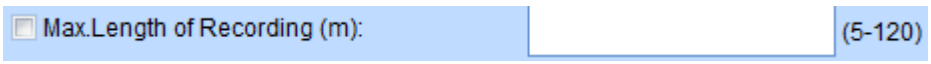
To determine current settings select the All check box, then select Read, all current setting will be displayed.



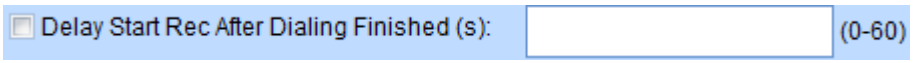
Creates a delay before recording starts from time first digit is dialed. This may be needed if using commands to start/stop/mute recordings. If the value is 0, the call will be recorded entirely from pick up.



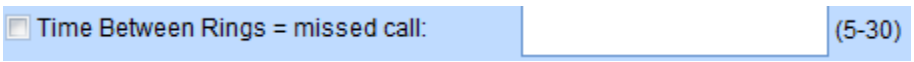
Sets a minimum time of a recording to be saved, helps eliminate misdials and very short calls from being saved.
Recommend: 5s



It limits recording time to avoid large audio file. If calls are longer than specified value, a new recording will be created for the balance of the call.

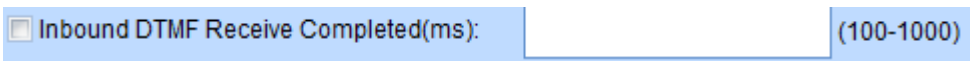


Timer to Start Recording ‘x’ seconds after dialing finishes.



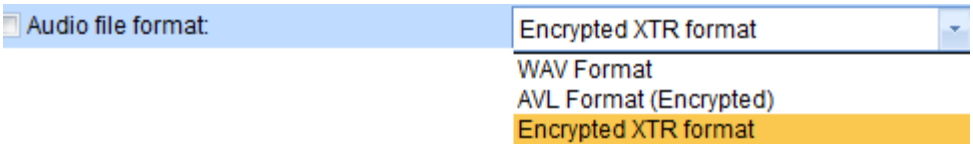
This is a timing parameter that measures the time between rings. When this is exceeded it is determined that the call was a missed call.

Recommend: >5 s

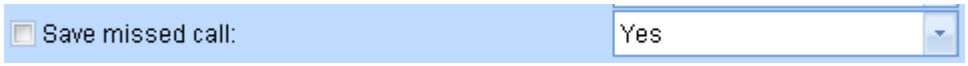


This sets the interval time between two DTMF digits. Once timer is exceeded, any further DTMF digits on the call will not be saved. If the interval time is 0, all the DTMF digits will be displayed.

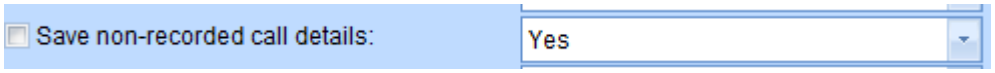
Recommend: 7s



The format of Recorded calls can be selected by the user. If using other Intelligent Recording Management Software, XTR format recommended.

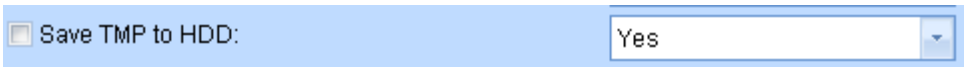


This provides a record of missed calls if selected..

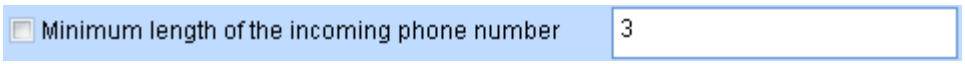


Enable/disable to save call records for outbound calls not recorded.

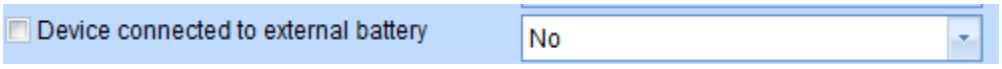
Enable/Disable to accept DTMF digits dialed during incoming call. Yes to save all digits including extension number dialing from an inbound call.



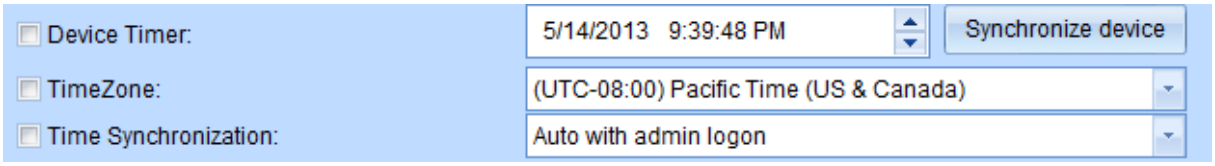
Enable/Disable to save tmp file while a live call is being recorded. In addition to the recording file, the system will generate a tmp file with CDR information for each call. It is recommended to enable this function; it will be used for system repair if needed.



Determines inbound call, helps differentiate from random digits that may be detected by the system (noise).
Recommend:3



Is device connected to Call Caddy internal Battery Backup?



Time and Time Zone setings. Time can be set to PC time or synched with FSK Caller ID.

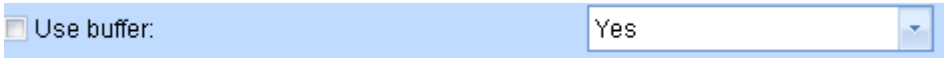
This setting is used to enable starting or stopping recording by DTMF digits during a call. For this to work on inbound calls, make sure that 'Accept DTMF During Incoming Call' is set to Yes. Also Channel trigger mode should be set to 'Key Control'.

The above 2 settings can be used to hide DTMF digits. This can be used to hide digits after a specific sequence has been detected. The second setting determines the length of the digits.

> For example, if the first setting is 556 and the second is set to 10. As long as system receives 556 during the call, it will show * 10 times instead of digits dialed.

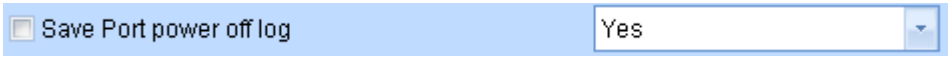
This is used to set a DTMF digit command to Mute and Resume recording. If this is selected, be sure to delay Start after dialing setting is set to avoid muting a call by dialing a number. Also, to work on incoming calls, you must set 'Accept DTMF During Incoming Call' to Yes.

This determines the number of digits that are compared with Phone Book to determine a match.

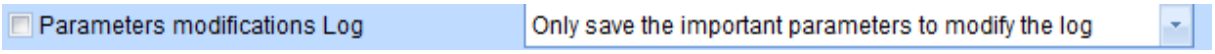


Use buffer to reduce time writing to Hard Disk.

Recommend: Yes

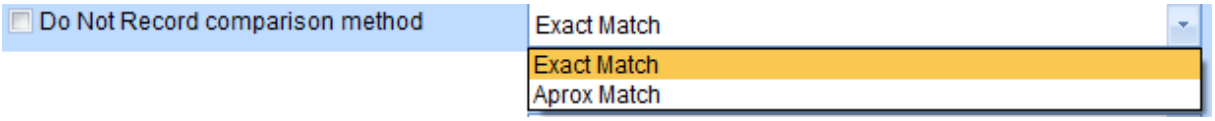


If no line connected to channel, report status to log?
Recommend: No.



Determines which changes to Parameters are reported in log information.

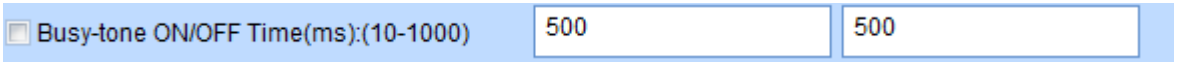
If using the optional Central Management Software, this will keep a log of downloads from the local Call Caddy.



Determines how the program will compare the Do Not Record Numbers listed on the phone book, either exact match, or approximate match

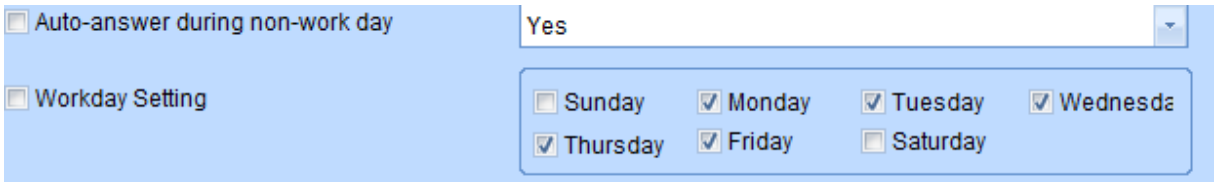
Example: if 949-587-1226 is a non-record number and set for aprox match, a call from 949-587-1222 would not be recorded.

Use caution setting this to Approx. as important calls may not be recorded.

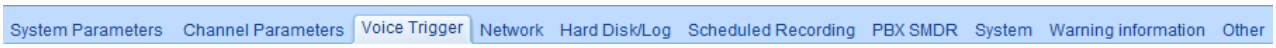


Allows the user to customize busy tone recognition. ON/OFF 500 and 500 is default.

This is a volume level that determines is user is still on the line..



The Call Caddy can be set to Auto-Answer and play a pre-programmed greeting to callers. This is typically dome on non-work days to alert caller of workday schedule, if no aouto-attendant greeting is available in phone system.



Voice Trigger Parameters

These settings are used if Voice Trigger is selected under trigger method for the channel.

Start Threshold: Level to Trigger Start of a Recording (lower is more sensitive)

Silence Time-Out: The period of time (ms) to end recording when level drops below threshold (5000ms = 5 seconds of silence)

Volume Level: Setting to determine level of silence.

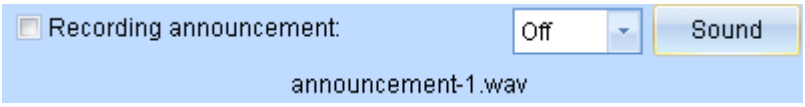
SMDR Data

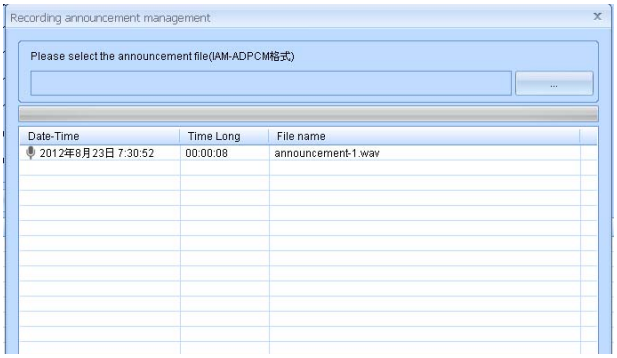
This setting is not enabled in the Call Caddy.

Recording Announcement Management

A Pre-Recorded Announcement can be played when a call is answered. By selecting this option you can upload recorded announcements to be played. This needs to be in IMA-ADPCM format. Maximum length of this recording is 30 seconds. ***Note- not typically used for the Call Caddy, any recording warning required would typically be placed in an announcement as part of a QSE.***

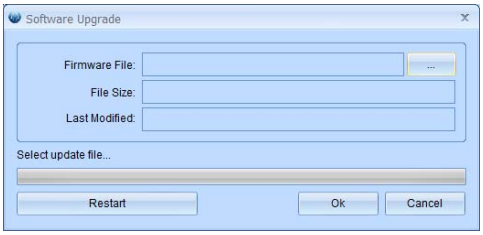
You can upload a recording announcement file to the Call Caddy; it will be played to both parties once the call is established.





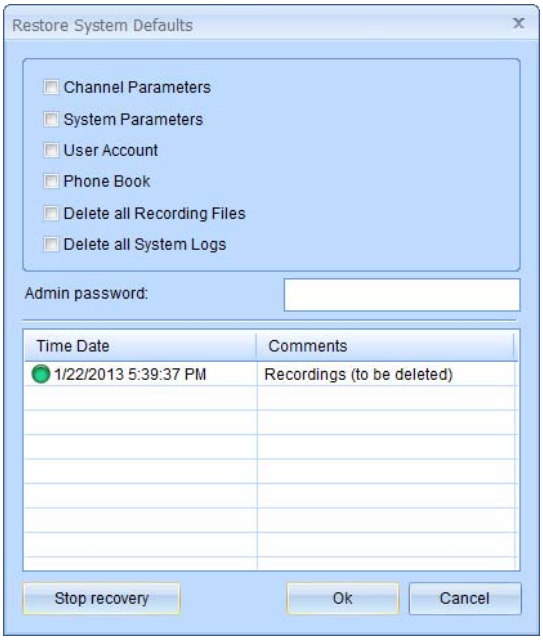
Note: Recording announcement file cannot be longer than 30s. Format is IMA-ADPCM.

Software upgrade



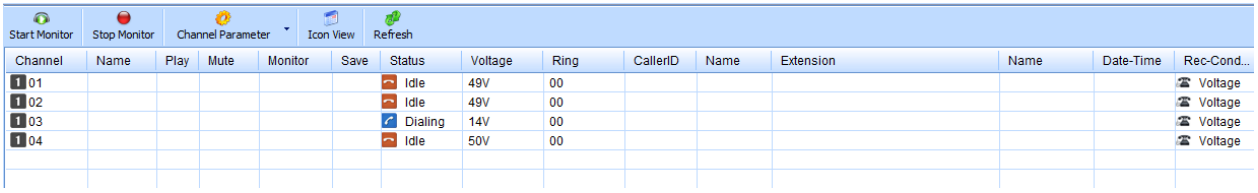
Call Caddy can easily be upgraded in the field. Place the upgrade file on a USB drive, insert the USB drive into the USB Port on the Call Caddy, and then click OK. Be sure to not power off the device during upgrade, it is also suggested to make sure channels are not active (you can disconnect lines). After upgrade, you will be prompted to restart the device. ***Note- If your Call Caddy is connected to the network and online, updates will be automatically sent by the host server.***

Restore system defaults



Changing back to System Defaults requires admin login. Once reset, former settings or recordings cannot be recovered.

Channel Status View

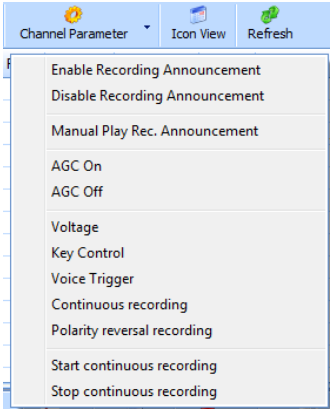


Start Monitor

This allows for live monitor of an active call from the Call Tracker Manager software using your PC's speakers, select the Channel then choose Start/Stop Monitor.

Channel Parameters

This allows for quick access to change parameters on the selected channel, functions that can be changed shown to the right.



Icon View

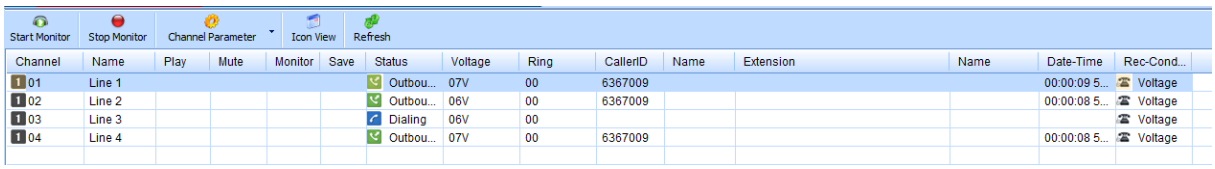
This shows an expanded view of Port Status

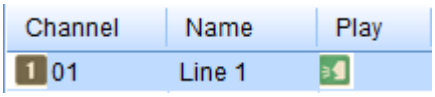
Refresh

This will update the view with any new information.

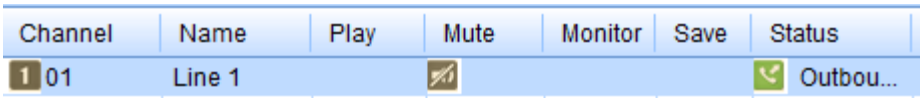
Main Status Display:

The Main Status Window shows the live status of activity on all channels, showing time, channel status, and other info, if desired; the user can hide unwanted columns.





Play – Indicates that the Recorded Announcement is currently playing on the channel



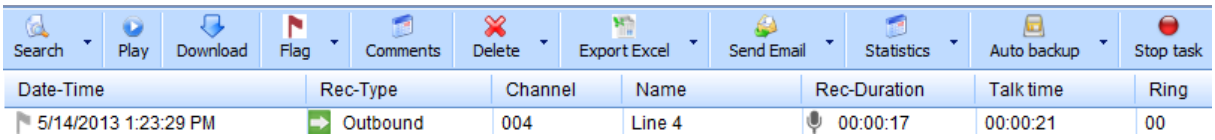
Mute- Shows indication if user has activated the Mute recording function, the Mute function is a Manual Start/Stop function using DTMF digits that are set in the System Parameter section.

Note: For this feature to work on incoming calls the 'Accept DTMF During Incoming Calls' selection under System setting must be set to 'Yes'.

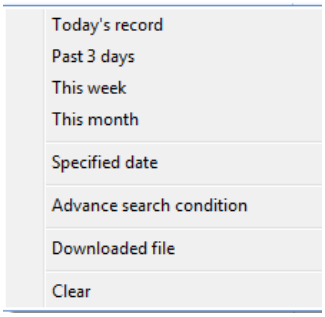
Monitor – Indication that the selected channel is being monitored

Save – Indicates if the Call is being Recorded or not , Green is Yes, Red is No. This only works with Hot-Key start/stop recording, if out of scheduled recording time, or if a specific number has been programmed to NOT record. In most cases all calls are recorded and indication will be blank.

Recording Playback and Management

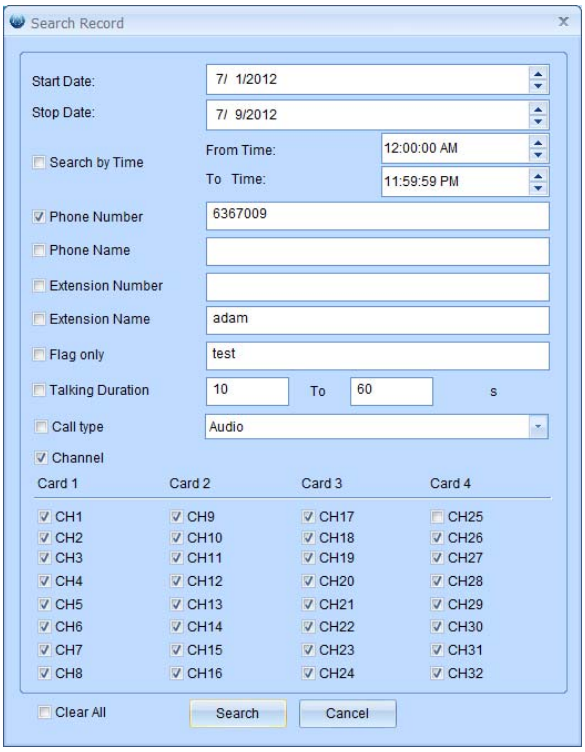


Search



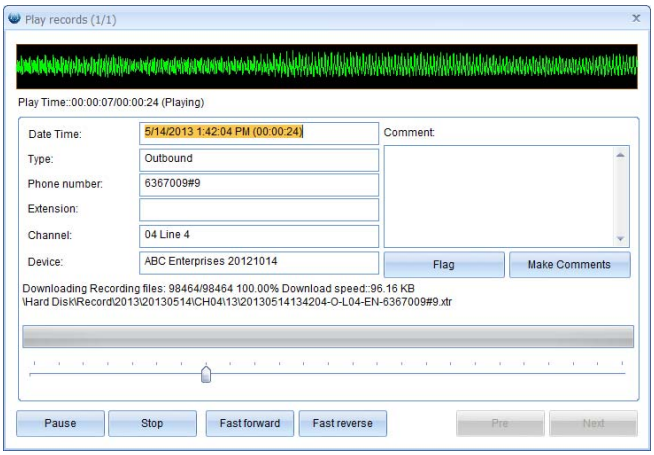
There are several default time spans for quick search.

If an Advanced Search is selected the user can use much more detailed information to quickly find a specific call as shown below:

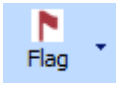


Play Recordings

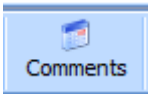
Select the desired file from the list and press Play or double-click, it will launch the player:



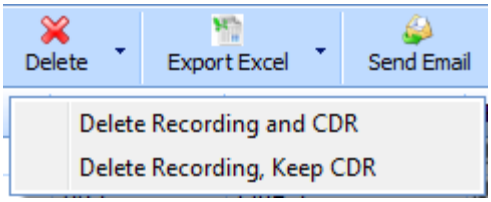
This downloads the recording files to the Local PC. It is recommended to do this when the system is idle. It will not download the same files twice as long as directory of the download stays the same.



Highlights the call in the list as an important call.



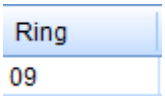
Comments can be associated with the recording.



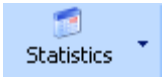
There are 2 Options when deleting , the first completely deletes the Recording and CDR (Call Detail Record). The second deletes the Recording, but leaves the record of the call in the list.

This allows for the export of the full list of calls in view or the select calls to Excel.

Attaches either full the Recording and Detailed information, or just CDR information to an outbound email, take note of the file size before attempting to send via standard email.



This shows the approximate time the call rang before being answered in seconds.

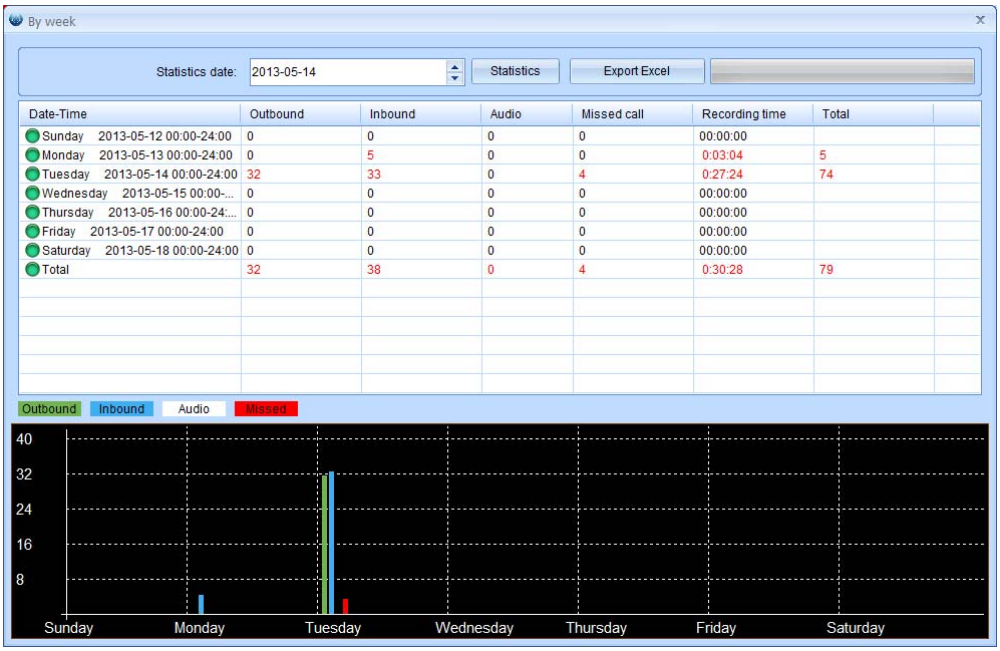


Statistic Reports can be run for a Day, Week or Month. The reports show breakdown of Inbound/Outbound and Missed Calls. There is also a section for Audio. These reports can be exported to Excel.

Call types are distinguished with different color.

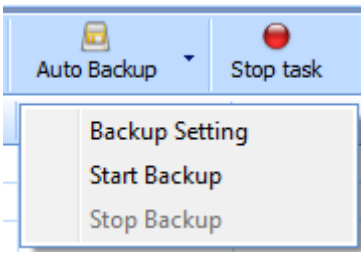
A few examples are shown below:

Statistics by Week, listed by Day:



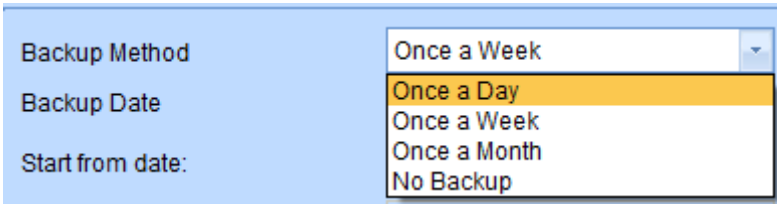
Statistics by month, listed with dates

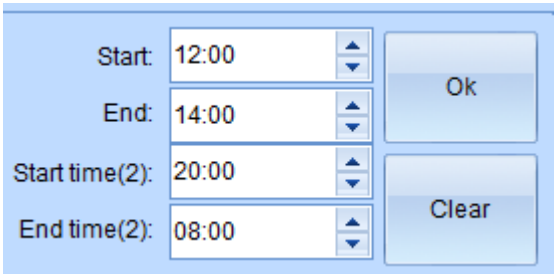
Backing Up Recordings



The user can set a scheduled backup of files onto the local PC or manually start and stop a backup as desired.

Auto backup is carried out by day, week or month:

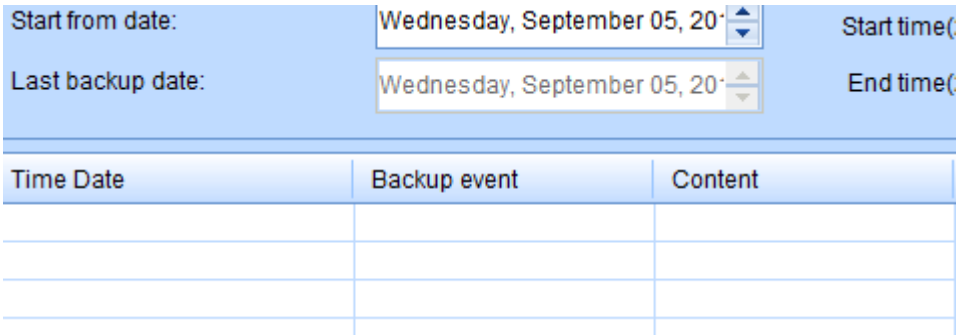




Set the Start and End Times for Backing Up calls, it is recommended to have this occur at off-hours to minimize the load on both the Call Caddy and your LAN.

There are 2 time ranges for backup that can be set.

Select Start Date for Backup , the system also displays the last backup date as well as history of backups as shown below:

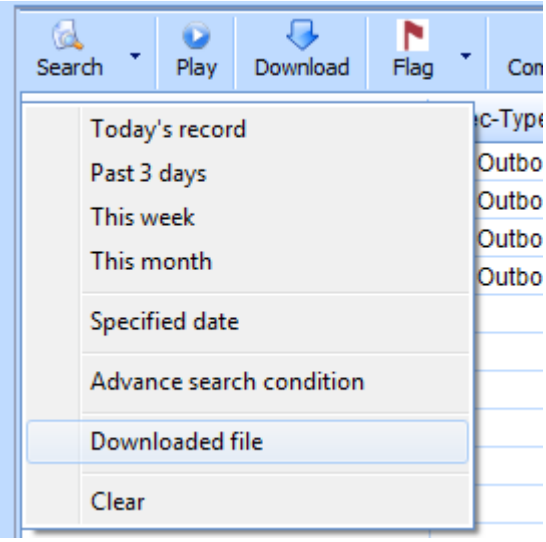


NOTE- Set the Destination folder for Backup under Settings> Other Tab

This Stops current Task, such as Delete, Downloading and Playing

Playback downloaded Recordings

Under the search drop-down menu select downloaded file, this will direct the search to the network drive location where your calls have been downloaded to for playback:

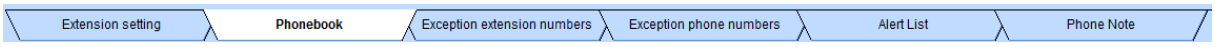


Phone Book

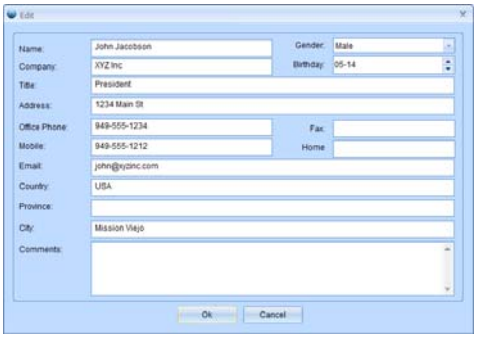
The Phonebook settings are divided into several areas as shown below, it used for creating exception lists, black lists and associating extension numbers with names when used with SMDR , as well as other functions discussed below:

Extension setting: The parameter works with the SMDR function, it associates a name with the extension numbers:

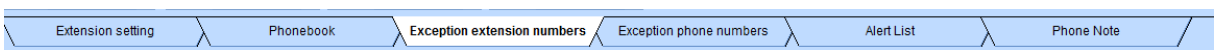
Name	Extension	Comment
Steve	301	Sales
Don	302	Operations
Rachel	304	Admin
Gary	305	Operations



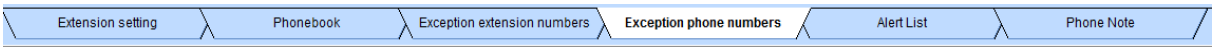
Phone Book: Inbound and outbound number will be matched and saved with phone book information.



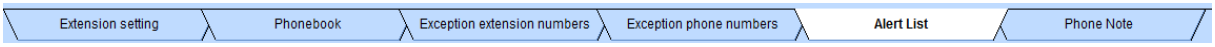
Name	Company	Title	Address	Office Phone	Mobile	Email
John Jacobson	XYZ Inc	President	1234 Main St	949-555-1234	949-555-1212	john@xyzinc.com



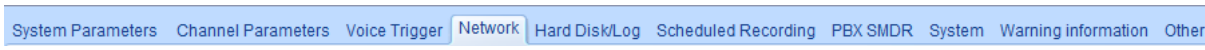
Exception extension numbers: This defines which extensions should NOT be recorded. **NOTE: this does NOT work with Call Caddy as an SMDR interface is needed to the PBX.**



Exception Phone Number: You can configure specified phone not to be recorded

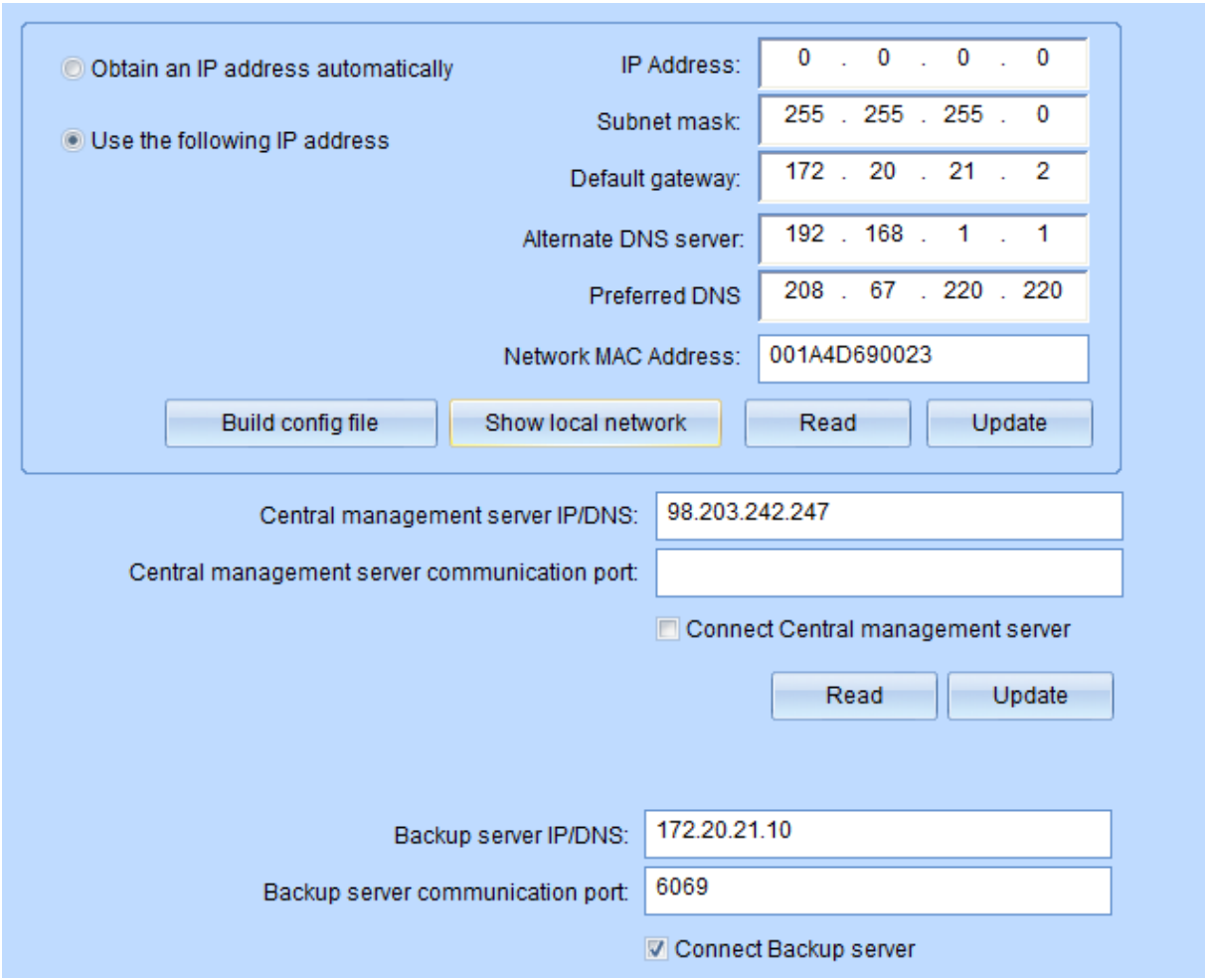


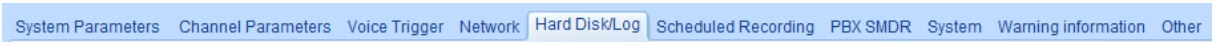
Alert List: Alert message will be generated to admin when call is received or made to an Alert List number, this is helpful to identify that an important client may be on the line, or other purposes to ensure employees to not make or take excessive calls from a specific phone number. The optional Pop-Up needs to be set on Other Tab in the Settings section.



Network Setting

This allows the installer to set the network setting of the Call Caddy and establish connection with Central Management Server (if used)

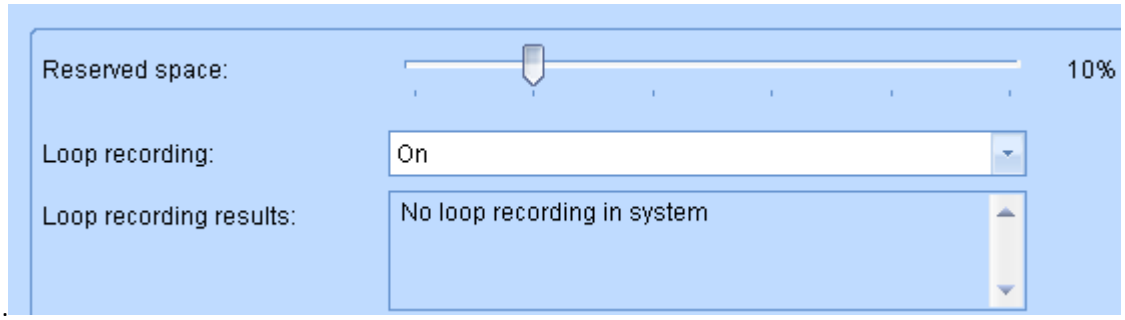




Hard Disk Parameters and Logs

Reserved Space: This reserves space on the drive for buffering, recommended setting 10%

Loop recording: When enabled, the Call Caddy will record over oldest recordings when hard drive is full. If disabled and hard drive is full, recording will stop until hard drive is changed.



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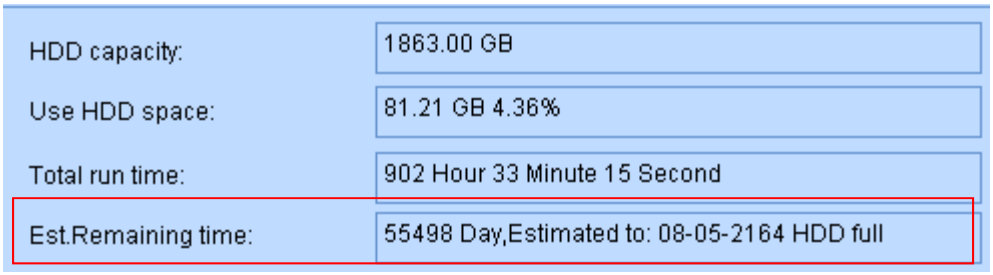
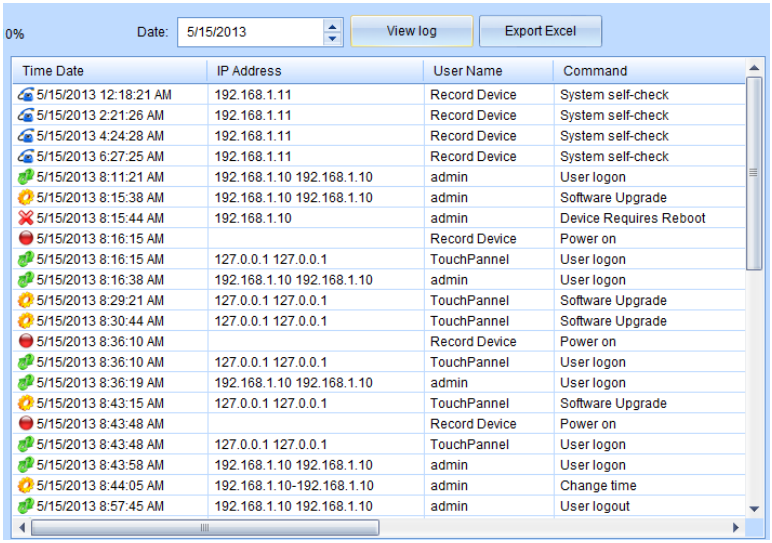
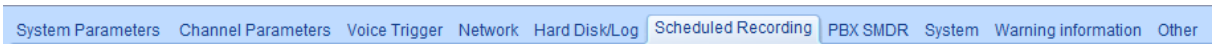


Hard Drive System log: The critical operations will be recorded in system log.

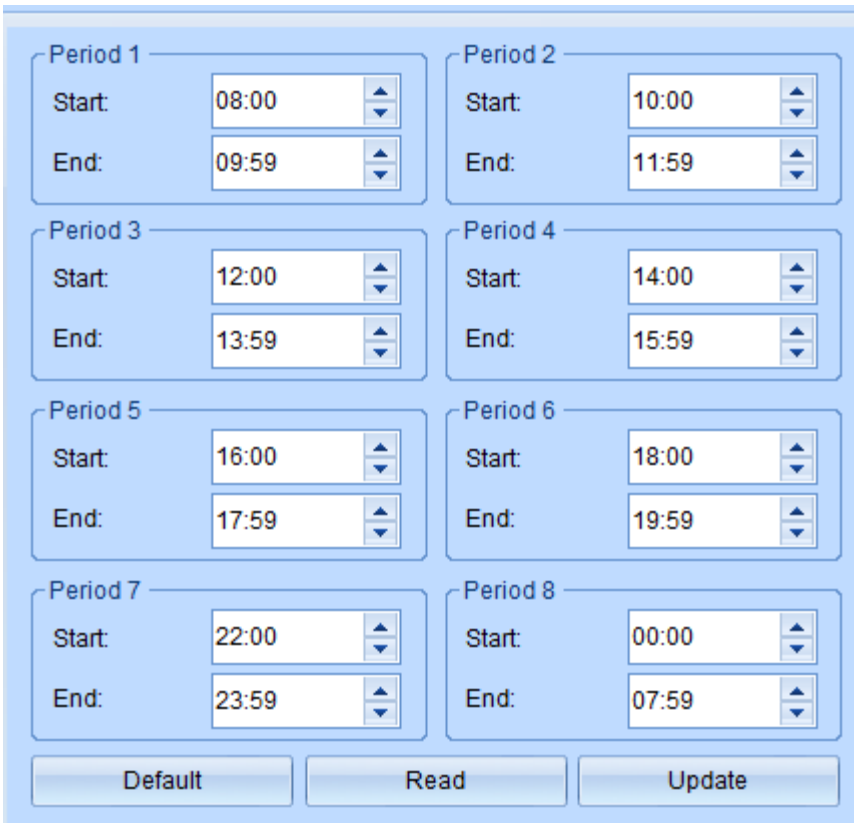


Time Date	IP Address	User Name	Command
5/15/2013 12:18:21 AM	192.168.1.11	Record Device	System self-check
5/15/2013 2:21:26 AM	192.168.1.11	Record Device	System self-check
5/15/2013 4:24:28 AM	192.168.1.11	Record Device	System self-check
5/15/2013 6:27:25 AM	192.168.1.11	Record Device	System self-check
5/15/2013 8:11:21 AM	192.168.1.10 192.168.1.10	admin	User logon
5/15/2013 8:15:38 AM	192.168.1.10 192.168.1.10	admin	Software Upgrade
5/15/2013 8:15:44 AM	192.168.1.10	admin	Device Requires Reboot
5/15/2013 8:16:15 AM		Record Device	Power on
5/15/2013 8:16:15 AM	127.0.0.1 127.0.0.1	TouchPannel	User logon
5/15/2013 8:16:38 AM	192.168.1.10 192.168.1.10	admin	User logon
5/15/2013 8:29:21 AM	127.0.0.1 127.0.0.1	TouchPannel	Software Upgrade
5/15/2013 8:30:44 AM	127.0.0.1 127.0.0.1	TouchPannel	Software Upgrade
5/15/2013 8:36:10 AM		Record Device	Power on
5/15/2013 8:36:10 AM	127.0.0.1 127.0.0.1	TouchPannel	User logon
5/15/2013 8:36:19 AM	192.168.1.10 192.168.1.10	admin	User logon
5/15/2013 8:43:15 AM	127.0.0.1 127.0.0.1	TouchPannel	Software Upgrade
5/15/2013 8:43:48 AM		Record Device	Power on
5/15/2013 8:43:48 AM	127.0.0.1 127.0.0.1	TouchPannel	User logon
5/15/2013 8:43:58 AM	192.168.1.10 192.168.1.10	admin	User logon
5/15/2013 8:44:05 AM	192.168.1.10-192.168.1.10	admin	Change time
5/15/2013 8:57:45 AM	192.168.1.10 192.168.1.10	admin	User logout



Scheduled Recording Time Section

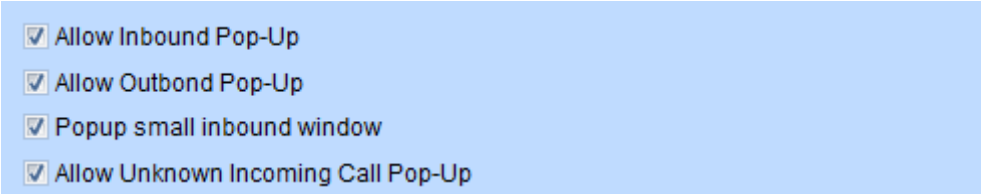
Turned on by Channel in Channels settings, this is the area where installer can define time periods for starting and stopping recording by channel if desired.



SMDR Integration

This section cannot be activated in the Call caddy

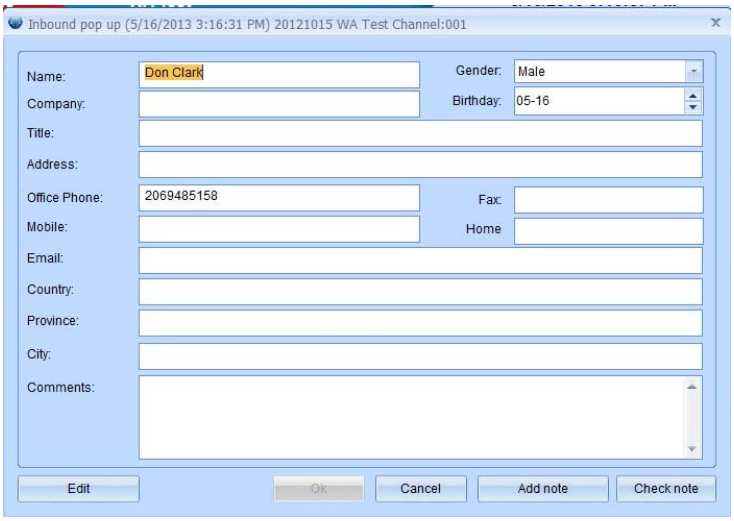
Other Settings

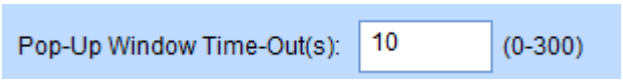


The above settings set options to enable or disable screen pop alert when criteria for same are met within the program. This includes information from Phone Book, Alert List notifications etc.

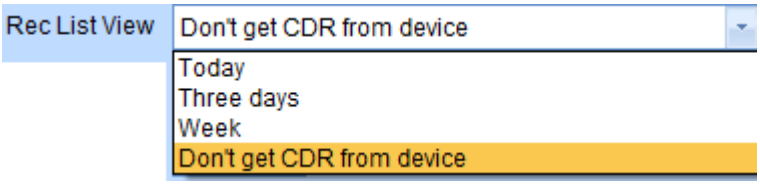
Example of Small Window Pop-Up

Full Size Pop-Up, populated by information in the Phone Book if used :

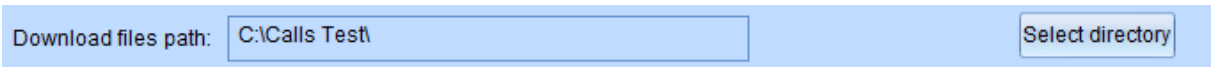




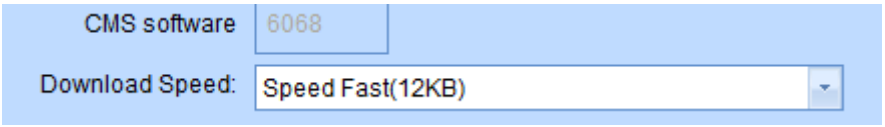
Duration Pop-Up window remains on Desktop of PC



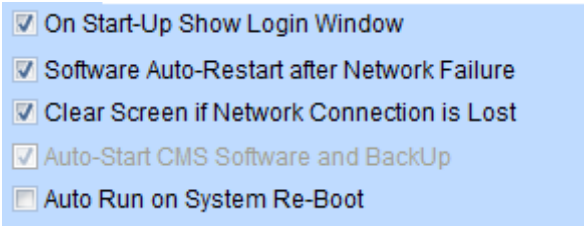
On start-up software will display call records from selected time frame.



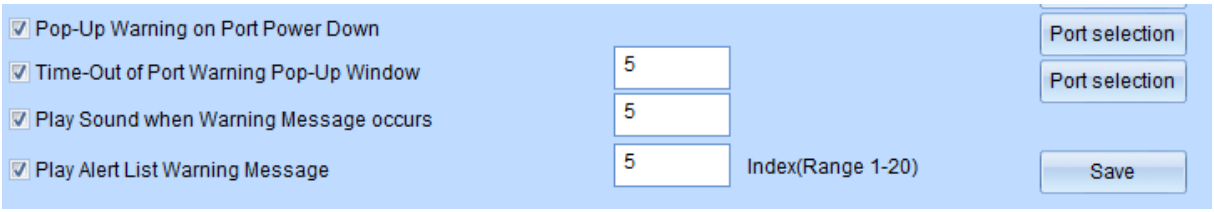
This sets the directory where calls are downloaded to. It is important to not change this directory very often to avoid downloading calls more than once.



Settings for use with Central management Software



These are preference settings that determine behavior of the software upon start-up or network loss.



Manager Set-Up and Permissions

Online user: Shows Managers that are currently logged into the Call Caddy System

Shows online time, online duration, IP address, software version and MAC address

User Name	Online time	Online duration	IP Address	Software Ver	MAC Address
admin	5/15/2013 10:13:09 PM	00:00:07	192.168.1.10 / 192.168.1.10	130325 1.0.0.1	1C-65-9D-96-1B-26

User Management

This section is used to add multiple users to the Call Caddy system. Users can be given full or restricted access to the features and recordings by channel.

Add new account

User name: Max. 16 characters

Password: Max 16 characters

New users are given permissions over features as well as over which Channels they can access or monitor as shown to the right.