SonataSuite

Sonata Recording
Reference Guide Ver. 1.03

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Introduction

Sonata Suite is a set of programs that integrate with platforms based on Asterisk, below the list of these programs:

- SwitchBoard
- Billing System
- **Recording Management System**
- Call Center Reports
- Communicator

1. - Recording Management System

Sonata Recording Management is a software through which you can manage the recordings of your PBX. With Sonata RM you have the following options:

Panel

In the Main Panel, the Agent can observe his or her latest, the Supervisor can see the last calls of his or her Team, and the Administrator the last calls of the system. It is also possible to manage Flag, Reference and Note, as well as listen to the recording. Only the Supervisor or Administrator can qualify the call.

Flag

It is possible to catalog the type of call using different color flags associated with different texts. These allow us to search for calls by flag type, for example: Green Flag -> Sale, Red Flag -> Support, etc.

Team

With Sonata RM you can group the Agents by Team, that way only the Supervisor is allowed to see the recordings of the Team to which it is associated.

1.1 Installation

1.1.1 Downloads and Install

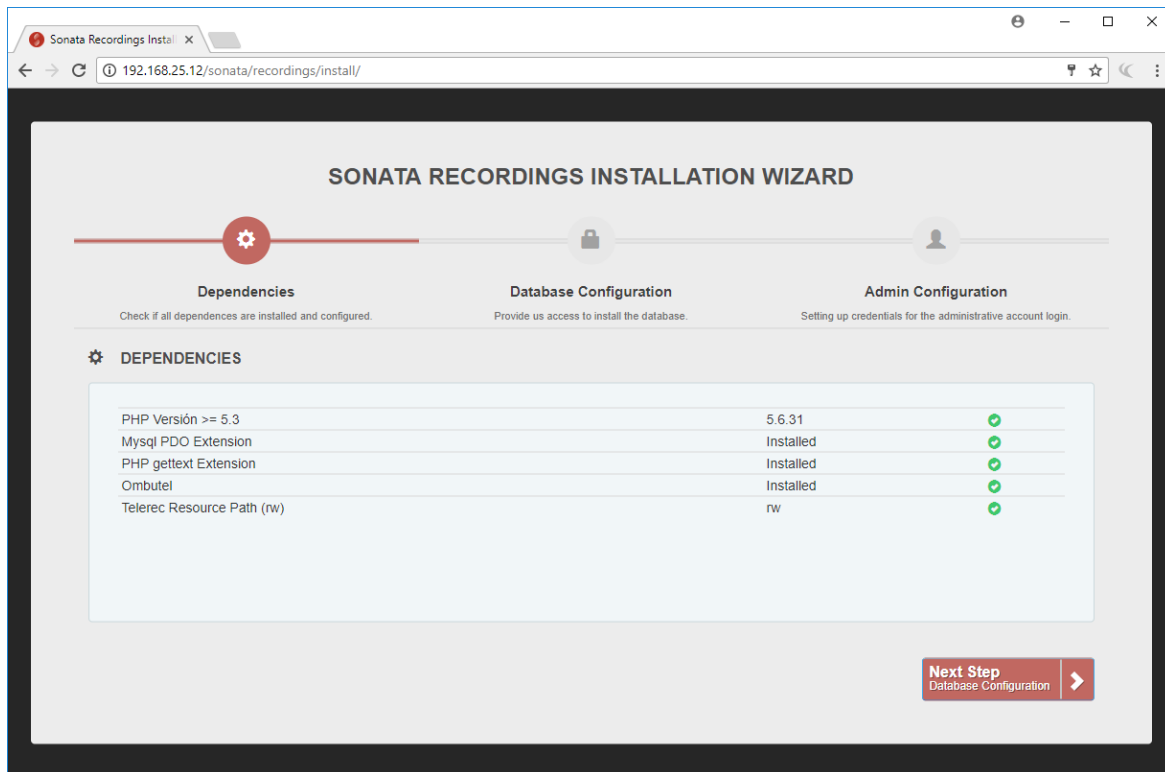Open the SSH console, and download the repo, and copy in /etc/yum.repos.d/

wget repo.telesoftsa.com/sonata/sonata.repo

mv sonata.repo /etc/yum.repos.d/sonata.repo

yum install sonata-recordings

1.1.2 Goto URL

IP/sonata/recordings/

a.- First check dependencies

b.- The second step is to fill the following information

- Database Host, if you install Sonata Recordings on the same server where the PBX is installed and the CDRs are stored, it is recommended to select "localhost", otherwise enter the remote IP or host.
- Database User, user to access the MySQL database administrator. It is very important, as it is used to create Sonata Recordings databases.
- Database Password, password to access the MySQL database administrator. It is very important, as it is used to create Sonata Recordings databases. In the case of Ombutel and CompletePBX the root user does not have a password.
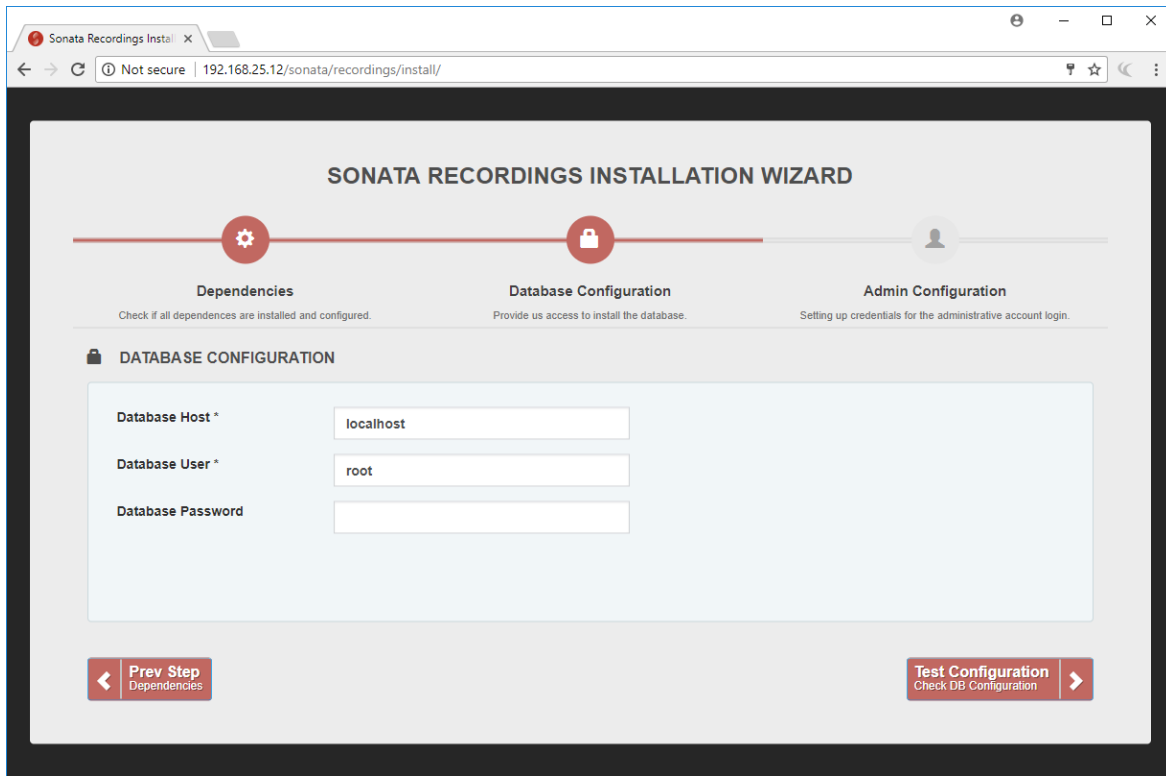
c.- The final step is to fill the following information

- Username, admin user to login into Sonata Billing.
- Password, admin password.
- Retype Password, admin password again.
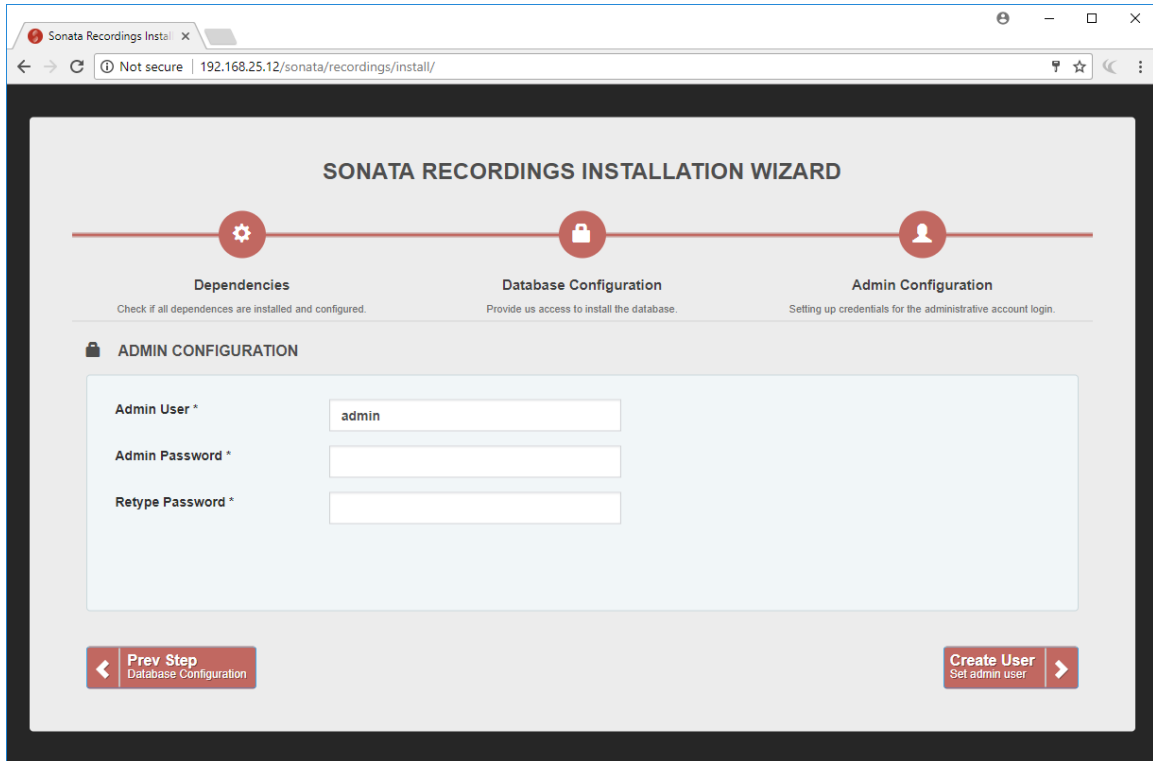
d.- Login with the user and password previously created.

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1.2 Admin Panel

The Manager/Supervisor/Administrator Panel displays the latest calls or recordings with the ability to set flags, create notes, set a reference or listen to the recording.

1.3 Settings

1.3.1 Flag Profiles

The Flag is used to categorize the recording. You can create multiple Flag profiles with different colors and flag meanings.

To create a Flag, go to Settings/Flag Profiles:
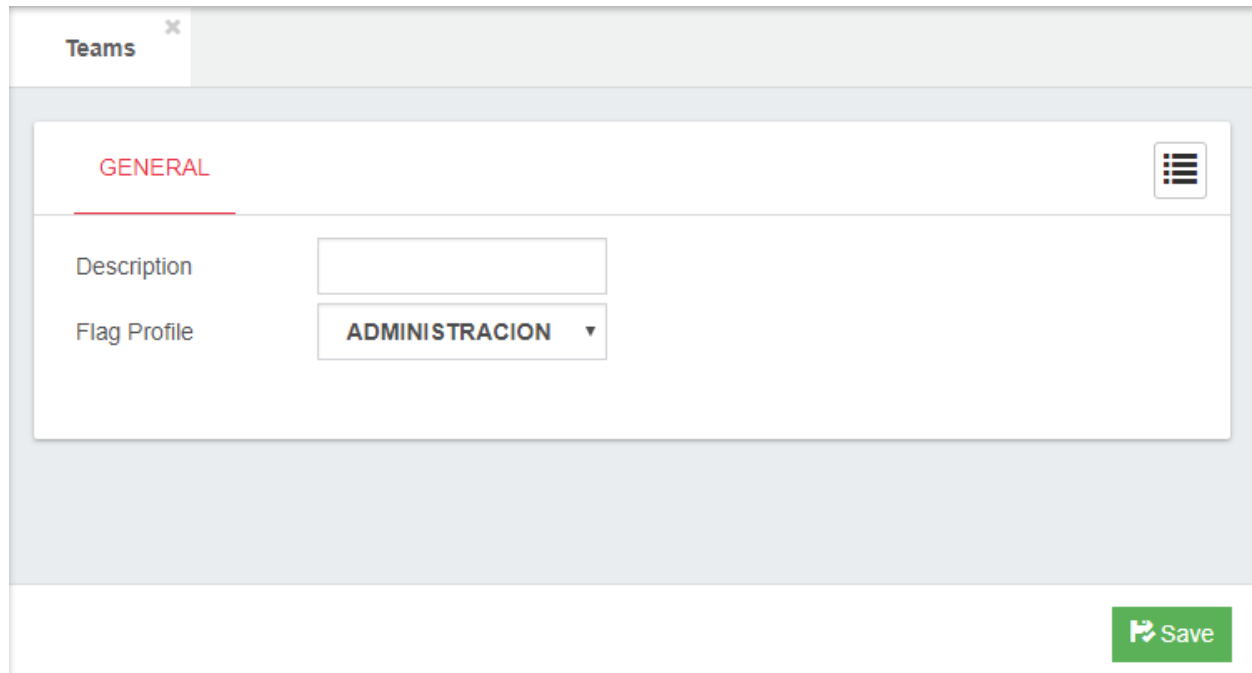
In Flag Profiles the following data must be configured:

- Description, Brief description with which the Flag Profile is identified.
- Add, press this button to add a Flag.
- Name, Flag name
- Color, Color with which this flag is associated.

1.3.2 Teams

It is possible to group extensions in Teams and each Team will have associated a Flag Profile. This greatly facilitates the administration of recordings by department.

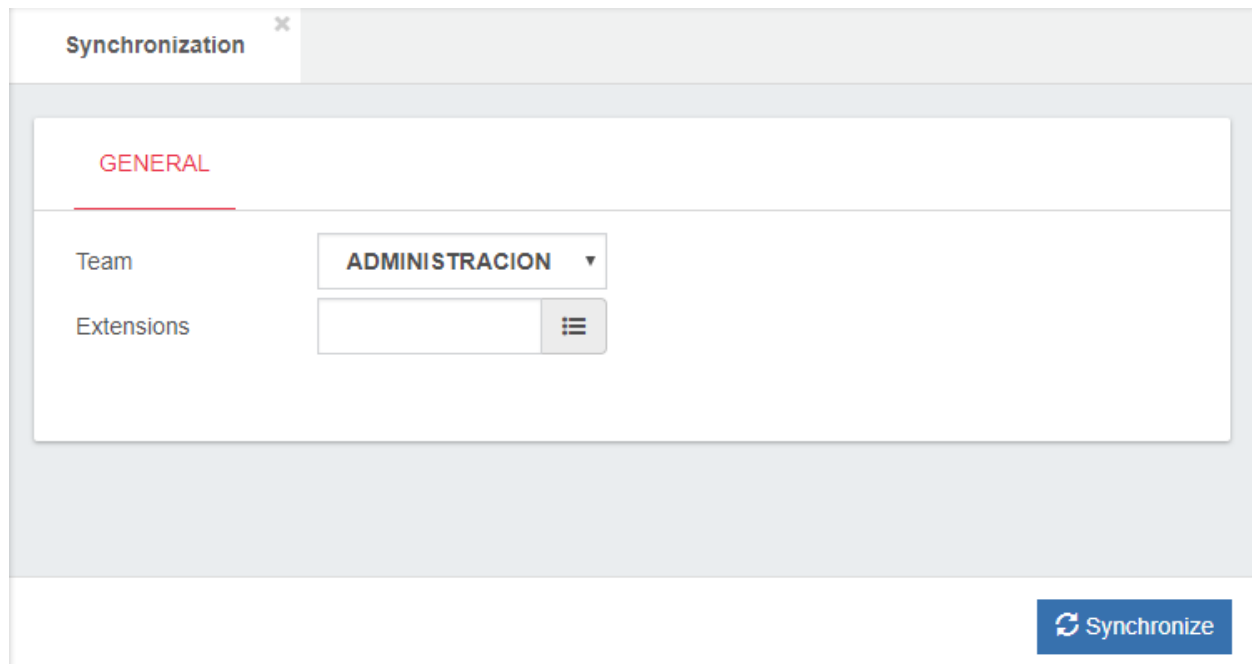To create a Team, go to Settings/Teams:

In Teams the following data must be configured:

- Description, Brief description with which the Team is identified.
- Flag Profile, Flag Profile with which this Team is associated

1.3.3 Synchronization

Now synchronize the extension, the demo just synchronizes 8 extensions, you can select the extension and associate it with your Team.

To synchronize the extension, go to Settings/Synchronization:
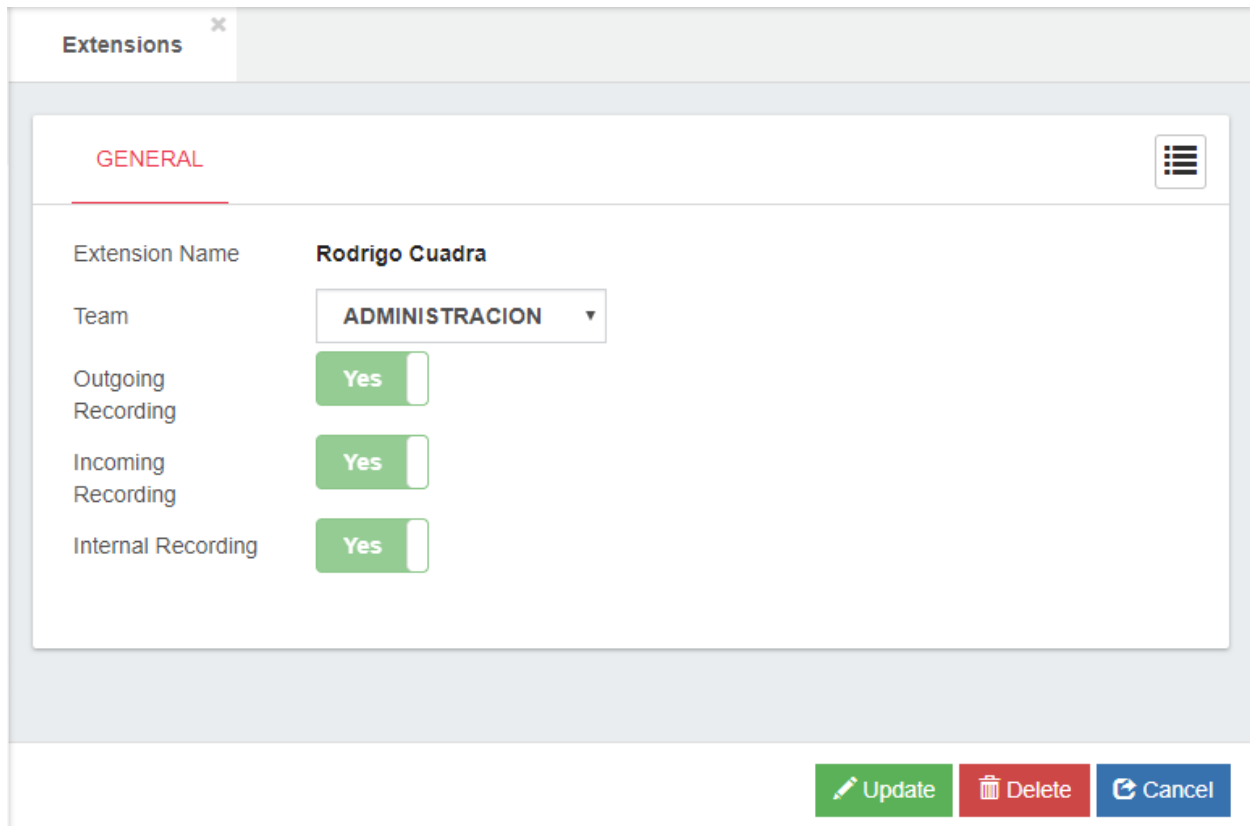
In Synchronization the following data must be configured:

- Team, Name of the Team that the extensions belong to.
- Extensions, Select the extensions to assign to this Team.

1.3.4 Extensions

It is possible to change the configuration of an extension after synchronizing, for this you have to go to Settings/Extensions:

In Extensions you can configure the following options:

- Team, Name of the Team that the extensions belong to.
- Outgoing Recording, If the outgoing calls are to be recorded.
- Incoming Recording, If the incoming calls are to be recorded.
- Internal Recording, If the internal calls are to be recorded.

1.3.5 User Profiles

Sonata Recording allows us to create users with different types of privileges, to create the Users Profiles it is necessary to go to Settings/User Profiles.

Users Profiles

GENERAL

Name

User Type   Super Administrator ▼

Permissions

Add Notes   Yes

Add Flags   Yes

Reference Numbers Yes

Allow Listen   Yes

Create Reports   Yes

Allow Delete   No

Create Users   No

Save

There are 4 different types of users, which we will describe below:

- Agent, just for the extensions owner, with this profile just can manage your own call recordings.
- Supervisor, the Supervisor profile can have access to the assigned Team.
- Manager, the Manager profile can have access to the assigned Supervisor.
- Super Administrator, the administrator of the system.
- Add Notes, allows the user to create notes related to the recording
- Add Flags, allows user to assign flags related to the recording
- Reference Numbers, Allows the user to associate the recording with a reference
- Allow Listen, Allows the user to listen to recordings
- Create Reports, Allows the user to create reports
- Allow Delete, allows user to delete recordings
- Create Users, Allows the user to create users

1.3.6 Users

Sonata Recording allows us to create users with different types of privileges, to create the Users it is necessary to go to Settings/Users. Each user will be associated with a User Profile, which must have been previously created.

In Users the options to configure are the following:

- User Type, we have 4 types of users:
    - Agent, just for the extensions owner, with this profile just can manage your own call recordings.
    - Supervisor, the Supervisor profile can have access to the assigned Team.
    - Manager, the Manager profile can have access to the assigned Supervisor.
    - Admin, the administrator of the system.
- Login Name, Name used to login (nickname).
- Full Name, Full name of user.
- Profile, Profile for this User
- Startup Dialog, which dialog to be displayed when logging into the system.

- Extension, this option only shows if you select Agent. It is the extension associated with the Agent, an Agent can only view its recordings.
- Teams, this option only shows if you select Supervisor. The Supervisor may have several Teams under his or her charge, which will give him access to the recordings that will have access to these Teams.
- Supervisors, this option only shows if you select Manager. The Manager may be in charge of several supervisors, which will give access to the recordings that these supervisors have access to.
- Password, Your secure password for login
- Department, User Department (Example: Development)
- Select Image,

First create the Agent, one for each extension. Remember to associate the user with each extension. In the second tab you can set the Language and more settings.

In second tab of Users the options to take to configure are the following:

- Language, Language to display the interface in.
- TimeZone, Time zone that the recordings will be displayed in.
- Multitab, the MultiTab option allows several forms to be displayed at the same time on the screen with the possibility of switching from one to the other by clicking the TAB

1.3.7 Maintenance

The maintenance module allows us to convert the recordings to mp3 format and erase the unnecessary recordings, thus reducing the hard disk use.

In Maintenance the options to configure are the following:

- Convert recordings, Convert recordings to MP3 format
- Schedule to Convert, Schedule used to run the process.
- Move After Convert, move the recordings after you convert them
  - Target,
    - Directory, when you select directory, the recordings are moved to the configured directory
    - FTP, when selecting FTP, the recordings are moved to the FTP server configured in the Configuration TAB
  - Directory, Directory where the recordings will be moved

In Clear Recordings TAB It is possible to delete old recordings or recordings of very short duration.

In Clear Recordings the options to configure are the following:
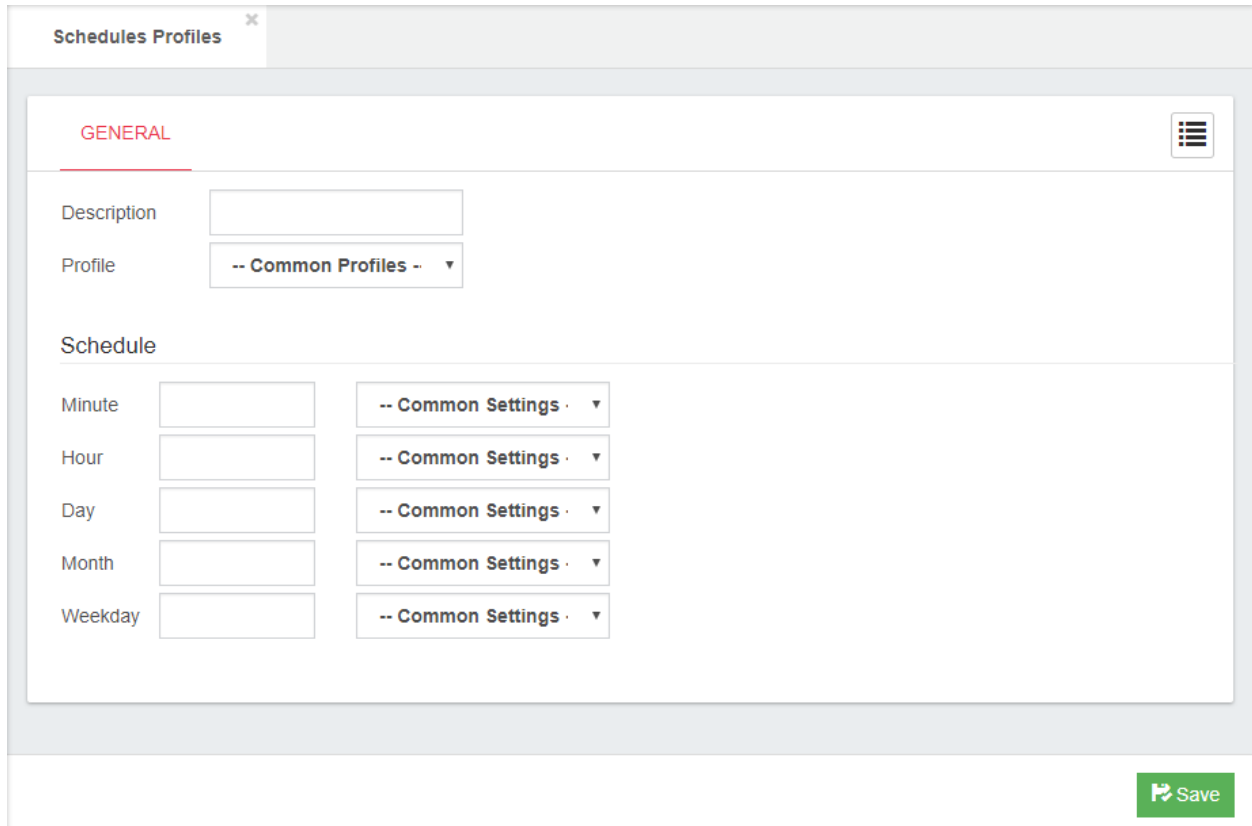
- Last N Days, makes it easier to delete recordings that are more than N days long. The execution of the task is associated with a Schedule.
- Less N Seconds, makes it easy to delete recordings of very short duration. The execution of the task is associated with a Schedule.

In the Configuration TAB, the client FTP account is created.

1.3.8 Schedules profiles

It is possible to create Schedules for the execution of certain actions like deletion of recordings, convert recordings and make backups of recordings.

1.4 Reports

1.4.1 Filters

In order to facilitate the search of recordings it is possible to create filters, which can be used at the time of the search.

In Filters the options to take to configure are the following:

- Description, brief description of the filter.
- Extensions, Extensions to include in the filter.
- Team, Team to include in the filter.
- Items, Different search criteria.
  - Condition, AND or OR condition.
  - Search By, Search field.
  - Mode, Search Mode.
  - Value, value to search.

1.4.2 Search Calls

In Search Calls, reports are generated with the possibility to modify Notes, Flags, References, etc. These reports can be exported.

In Search Calls the options to take to configure are the following:

- Filter, filter used to create the report. This filter was created previously.
- Team, Team to include in the search.
- Date, Date Range to Evaluate
- Reference, search for some reference in the recordings.
- Extensions, Extensions to include in the report.
- Note, search for a note in the recordings.
- Destination, number that was called.

1.4.3 Downloads
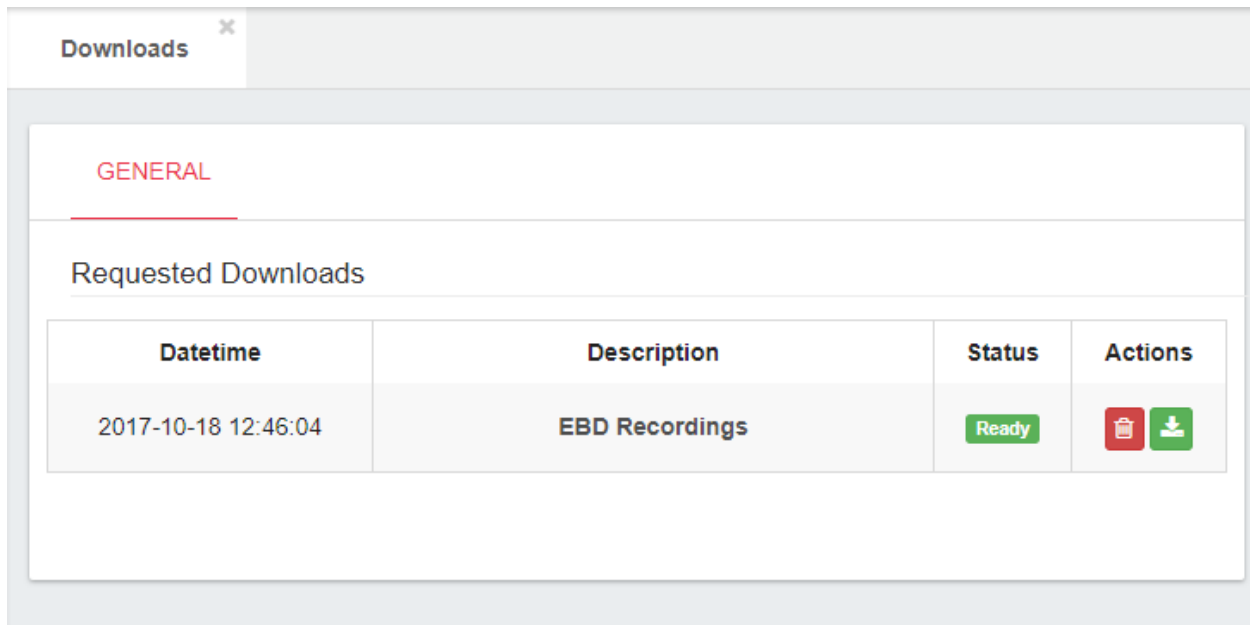
When one selects the option to export a report, this is the area where exported reports appear, so these can be downloaded.

All exported reports contain the recordings and a PDF file with a list of these. It also includes the flags, notes, and references if they are available.

1.5 Panel

1.5.1 Agent Panel

The Agent Panel displays the latest calls or recordings with the ability to set flags, create notes, set a reference or listen to the recordings.

We can also observe the last update of the calls that we are seeing with the possibility to press the button to update.

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1.5.1 Manger/Supervisor/Administrator Panel

The Manager/Supervisor/Administrator Panel displays the latest calls or recordings with the ability to set flags, create notes, set a reference or listen to the recording.

GENERAL

Date	Time	Team	Extension	Calltype	Number	Duration	Actions
2017-10-18	12:06:31	ADMINISTRACION	8253	→	922225031	00:01:26	
2017-10-18	11:32:13	ADMINISTRACION	8250	←	8255	00:00:13	
2017-10-18	11:32:13	ADMINISTRACION	8255	→	8250	00:00:13	
2017-10-18	10:56:23	ADMINISTRACION	8255	→	254	00:00:14	
2017-10-18	10:56:01	ADMINISTRACION	8255	←	8255	00:00:07	
2017-10-18	10:34:52	TELESOFT	8270	←	266	00:55:22	
2017-10-18	10:27:47	SOPORTE	8263	→	922550597	00:00:16	
2017-10-18	10:26:48	SOPORTE	8263	→	922550597	00:00:48	
2017-10-18	10:24:24	SOPORTE	8263	→	922550590	00:00:30	
2017-10-18	10:23:58	SOPORTE	8263	→	922550597	00:00:19	

Showing 1 to 10 of 15 entries

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The calls displayed here are those of all the extensions that the user has the right to see.