



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/

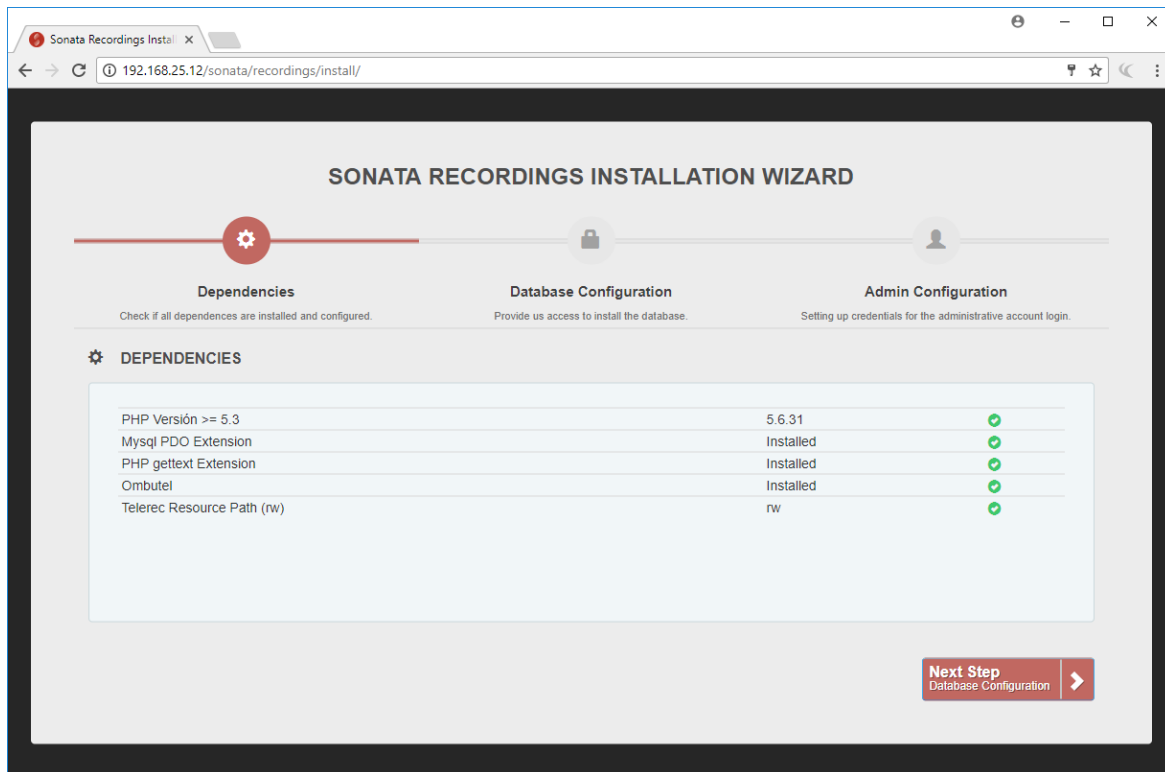
```
# wget repo.telesoftsa.com/sonata/sonata.repo
```

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

```
# yum install sonata-recordings
```

1.1.2 Goto URL

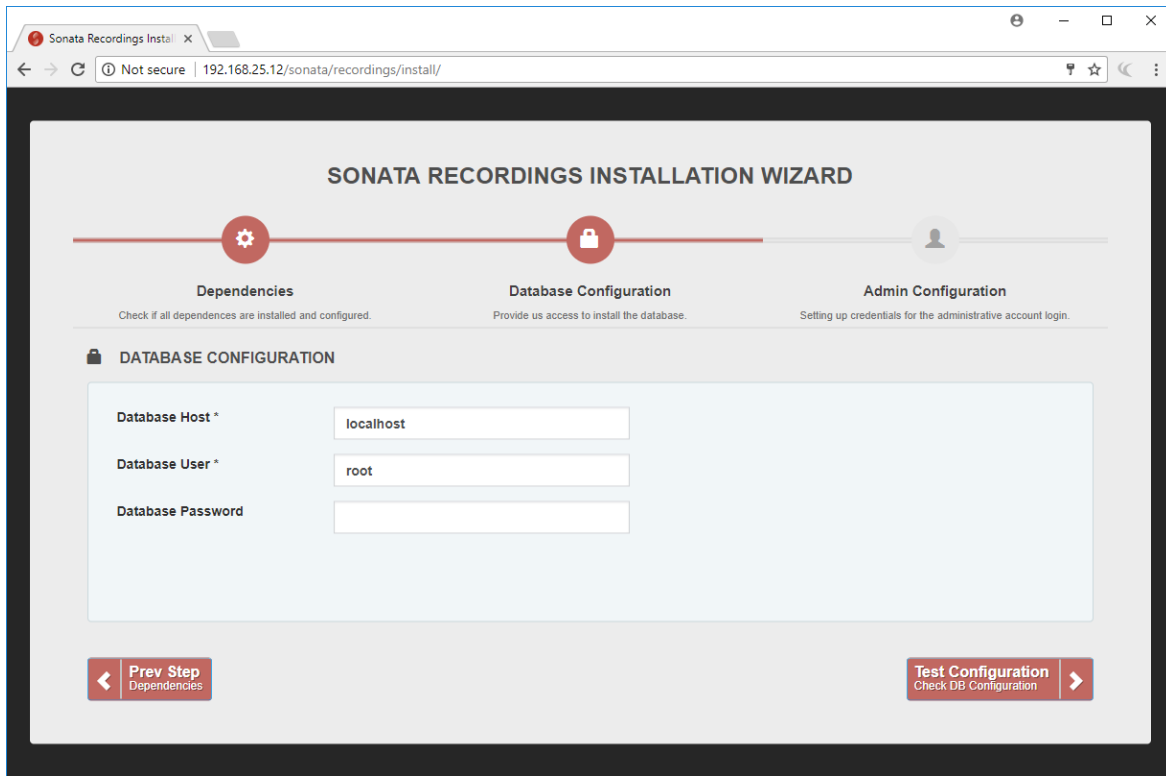
IP/sonata/recordings/



a.- First check dependencies

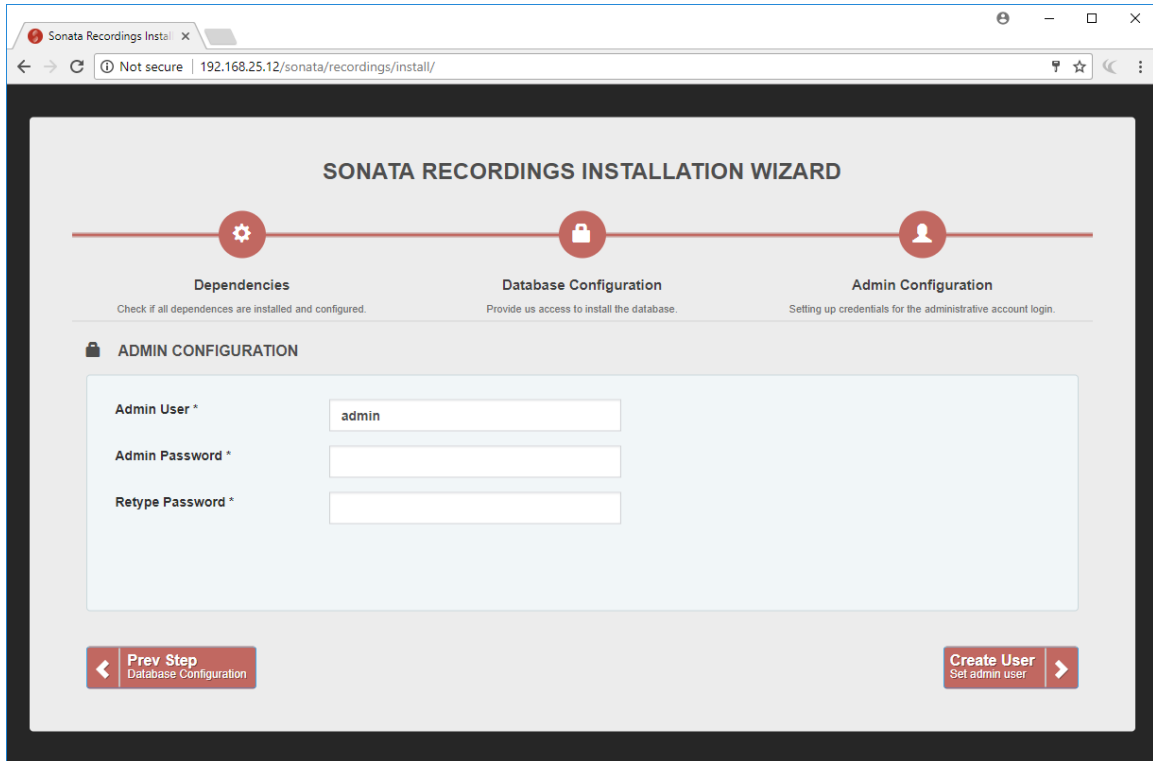
b.- The second step is to fill the following information

- 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.

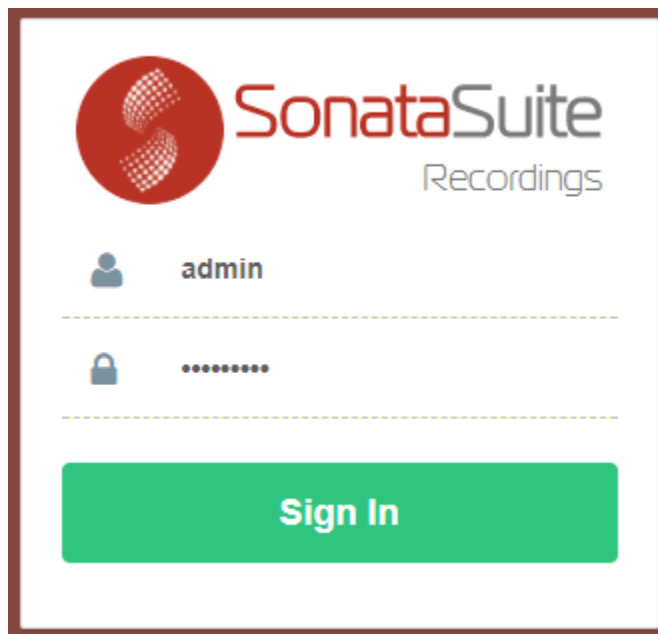


c.- The final step is to fill the following information

- 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.



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.

The screenshot shows the SonataSuite Recordings Admin Panel. The interface includes a sidebar with navigation options: PANEL, REPORTS, and SETTINGS. The main content area displays a table of call recordings under the 'GENERAL' tab. The table has the following columns: Date, Time, Team, Extension, Calltype, Number, Duration, and Actions. Below the table, it indicates 'Showing 1 to 10 of 32 entries' and includes a pagination control with buttons for 'Previous', '1', '2', '3', '4', and 'Next'.

Date	Time	Team	Extension	Calltype	Number	Duration	Actions
2017-10-17	10:49:38	ADMINISTRACION	8250	←	8253	00:00:21	[Icons]
2017-10-17	10:49:38	ADMINISTRACION	8253	→	8250	00:00:21	[Icons]
2017-10-17	10:48:34	ADMINISTRACION	8255	→	254	00:00:01	[Icons]
2017-10-17	10:48:34	ADMINISTRACION	8255	→	254	00:00:01	[Icons]
2017-10-17	10:38:03	SOPORTE	8263	←	8253	00:01:25	[Icons]
2017-10-17	10:38:03	ADMINISTRACION	8253	→	8263	00:01:25	[Icons]
2017-10-17	10:33:26	ADMINISTRACION	8255	←	7500	00:00:06	[Icons]
2017-10-17	10:26:01	ADMINISTRACION	8303	→	922528920	00:00:34	[Icons]
2017-10-17	09:54:44	ADMINISTRACION	8303	→	922528920	00:00:38	[Icons]
2017-10-17	09:40:53	ADMINISTRACION	8255	→	8270	00:00:39	[Icons]

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:

Flags Profiles

GENERAL

Description: SDOPORTE

Flags *

Name	Color	
Soporte	Red	
Contrato	Blue	Delete
Soporte en Linea	Green	Delete

Add

Update Delete Cancel

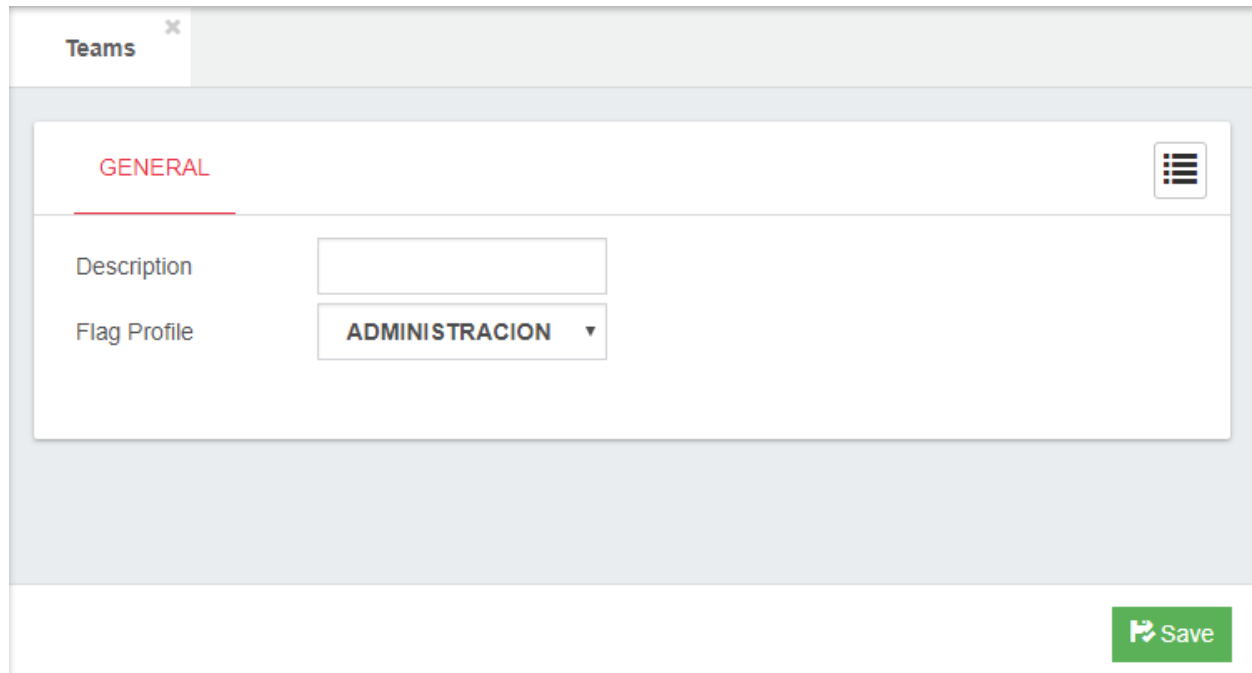
In Flag Profiles the following data must be configured:

- 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:



The screenshot shows a web interface for configuring a Team. At the top, there is a tab labeled "Teams" with a close button (x). Below the tab is a form with a "GENERAL" section, indicated by a red underline and a hamburger menu icon in the top right corner. The form contains two fields: "Description" with an empty text input box, and "Flag Profile" with a dropdown menu currently set to "ADMINISTRACION". At the bottom right of the form is a green "Save" button with a circular arrow icon.

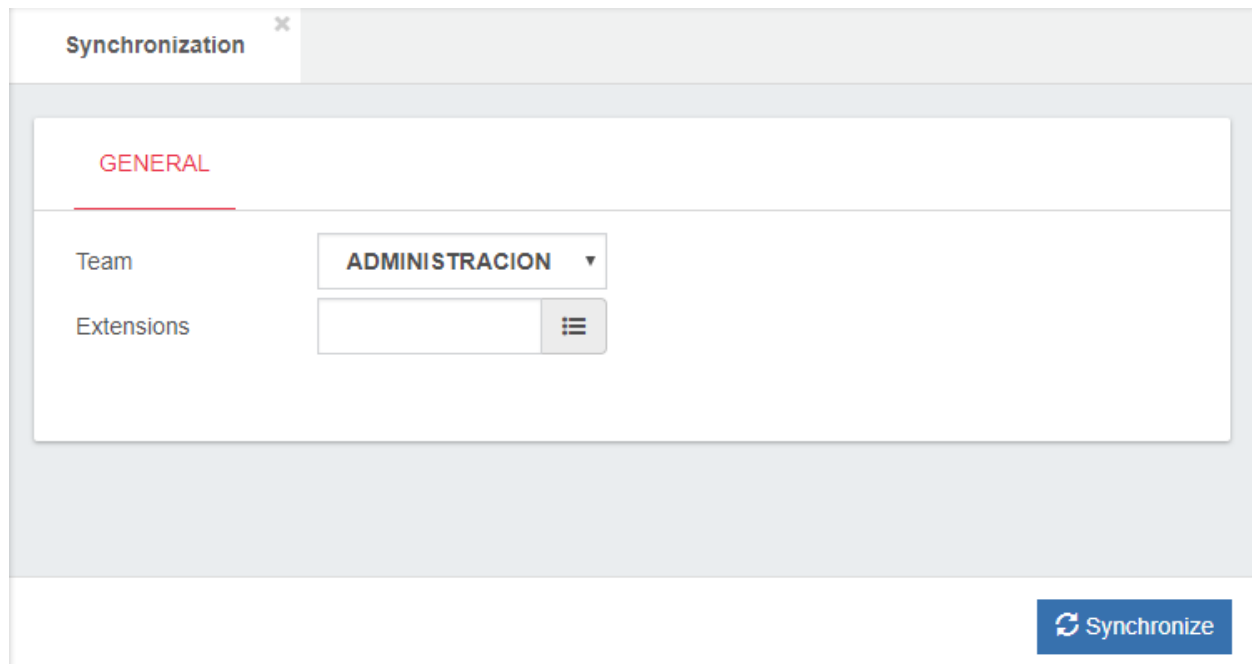
In Teams the following data must be configured:

- 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:



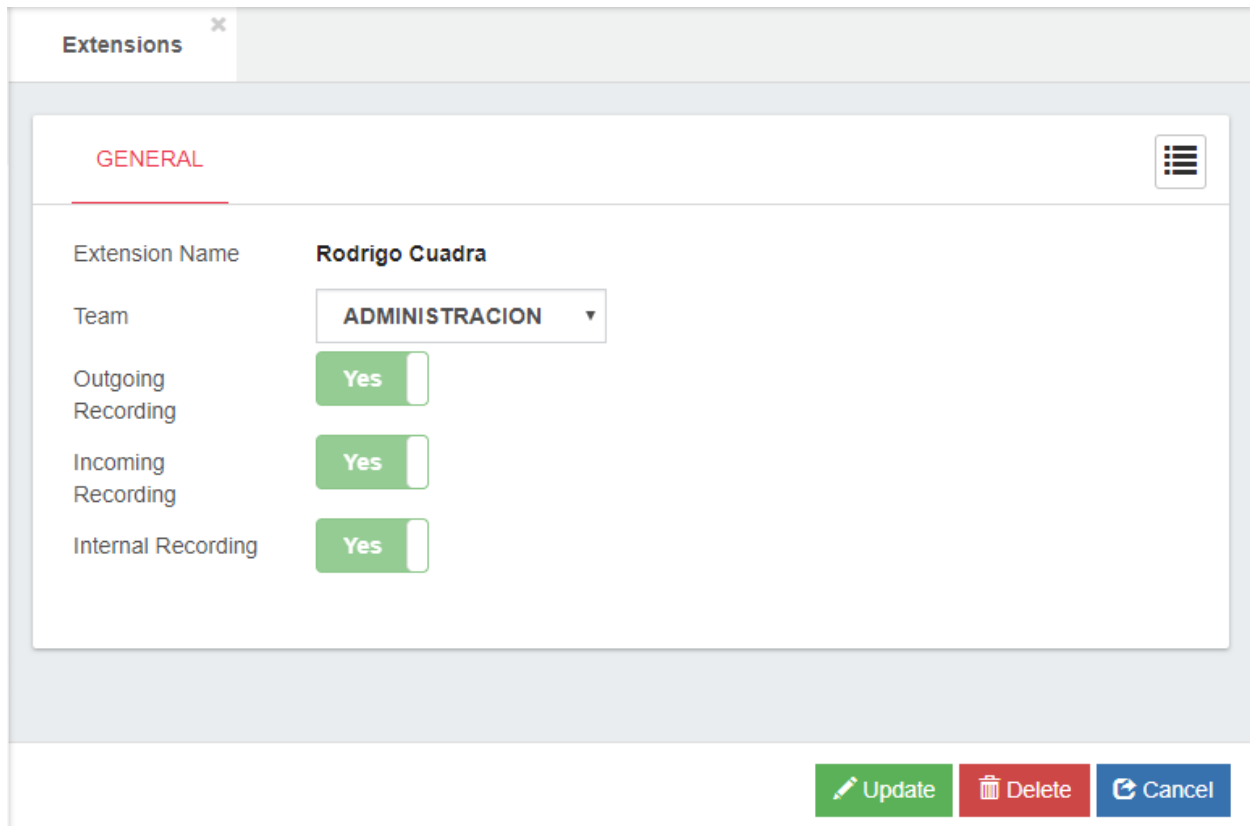
The screenshot shows a web interface for Synchronization settings. At the top, there is a tab labeled "Synchronization" with a close button (x). Below the tab, the "GENERAL" section is highlighted in red. Under "GENERAL", there are two fields: "Team" with a dropdown menu showing "ADMINISTRACION" and a downward arrow, and "Extensions" with a text input field and a menu icon (three horizontal lines). At the bottom right of the interface, there is a blue button with a refresh icon and the text "Synchronize".

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:



The screenshot shows a web interface for configuring extensions. The title bar reads 'Extensions' with a close button. The main content area is titled 'GENERAL' and contains the following fields:

Extension Name	Rodrigo Cuadra
Team	ADMINISTRACION
Outgoing Recording	Yes
Incoming Recording	Yes
Internal Recording	Yes

At the bottom right, there are three buttons: 'Update' (green), 'Delete' (red), and 'Cancel' (blue).

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.

The screenshot shows the 'Users Profiles' configuration interface. The 'GENERAL' tab is active. The 'Name' field is empty. The 'User Type' dropdown is set to 'Super Administrator'. The 'Permissions' section includes the following settings:

Permission	Value
Add Notes	Yes
Add Flags	Yes
Reference Numbers	Yes
Allow Listen	Yes
Create Reports	Yes
Allow Delete	No
Create Users	No

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.

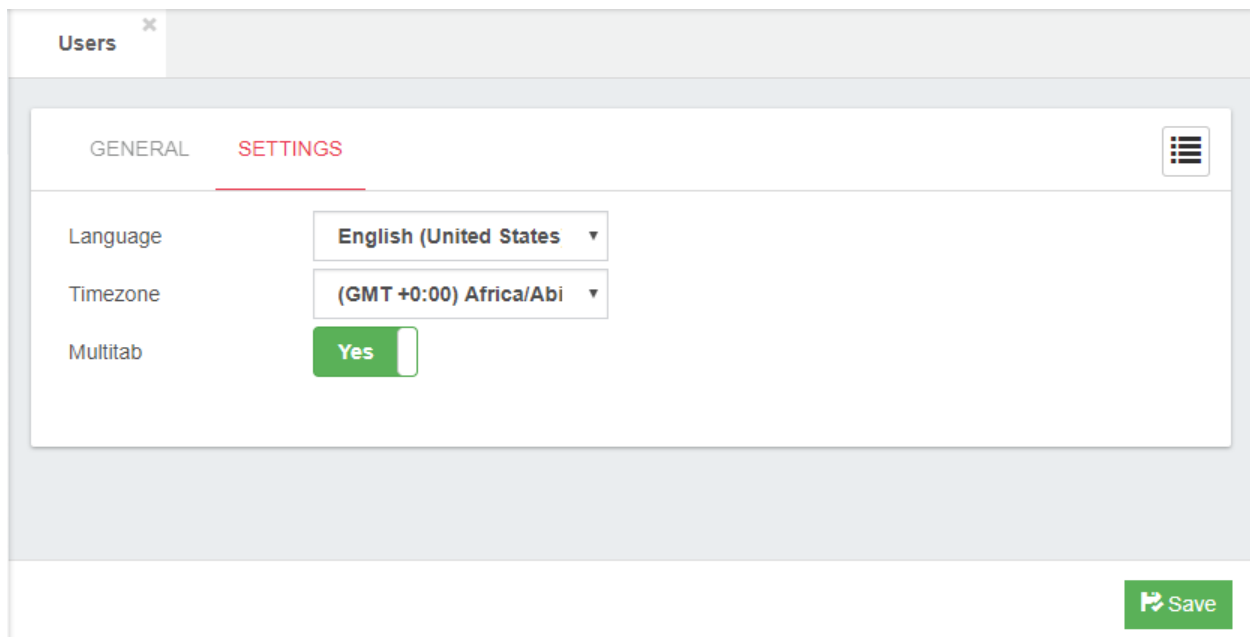
The screenshot displays the 'Users' configuration interface. At the top, there's a 'Users' tab with a close button. Below it, the 'GENERAL' tab is active, and 'SETTINGS' is also visible. The 'User Type' section has four buttons: 'Admin' (highlighted in green), 'Manager', 'Supervisor', and 'Agent'. The form fields include: 'Login Name *' (empty), 'Full Name *' (admin), 'Profile' (Super Administrator), 'Startup Dialog' (Activations), 'Password *' (masked with dots), and 'Department' (empty). To the right of the form is a circular profile picture placeholder with a red background and a white 'S' logo, and a 'Select image' button below it. A green 'Save' button is located at the bottom right of the form area.

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.



The screenshot shows a web application interface for user settings. At the top, there is a tab labeled 'Users' with a close icon. Below the tab, there are two sub-tabs: 'GENERAL' and 'SETTINGS', with 'SETTINGS' being the active tab. The settings are organized into three rows: 'Language' with a dropdown menu set to 'English (United States)', 'Timezone' with a dropdown menu set to '(GMT +0:00) Africa/Abi', and 'Multitab' with a green toggle switch labeled 'Yes'. A green 'Save' button with a refresh icon is located at the bottom right of the settings area.

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.

The screenshot shows a web application window titled "Maintenance" with a close button (X). The interface has three tabs: "GENERAL" (selected), "CLEAR RECORDINGS", and "CONFIGURATION". Under the "GENERAL" tab, there are several configuration options:

- Convert Recordings:** A toggle switch set to "Yes".
- Schedule to Convert:** A dropdown menu with "Diario" selected.
- Move To:** A section header.
- Move After Convert:** A toggle switch set to "No".
- Next Run Date:** A section header.
- Convert Recordings:** A text field displaying "Thu, 19 Oct 2017 00:00:00 -0600".

A green "Save" button with a floppy disk icon is located at the bottom right of the configuration area.

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.

The screenshot shows a web interface titled 'Maintenance' with a close button (x). It has three tabs: 'GENERAL', 'CLEAR RECORDINGS' (which is active and highlighted in red), and 'CONFIGURATION'. Under the 'CLEAR RECORDINGS' tab, there are three input fields: 'Last N Days' with a text box and a dropdown menu showing '-- Select a'; 'Less N Seconds' with a text box and a dropdown menu showing '-- Select a'; and 'Next Run Date' with a text box. A green 'Save' button is located at the bottom right of the form.

In Clear Recordings the options to configure are the following:

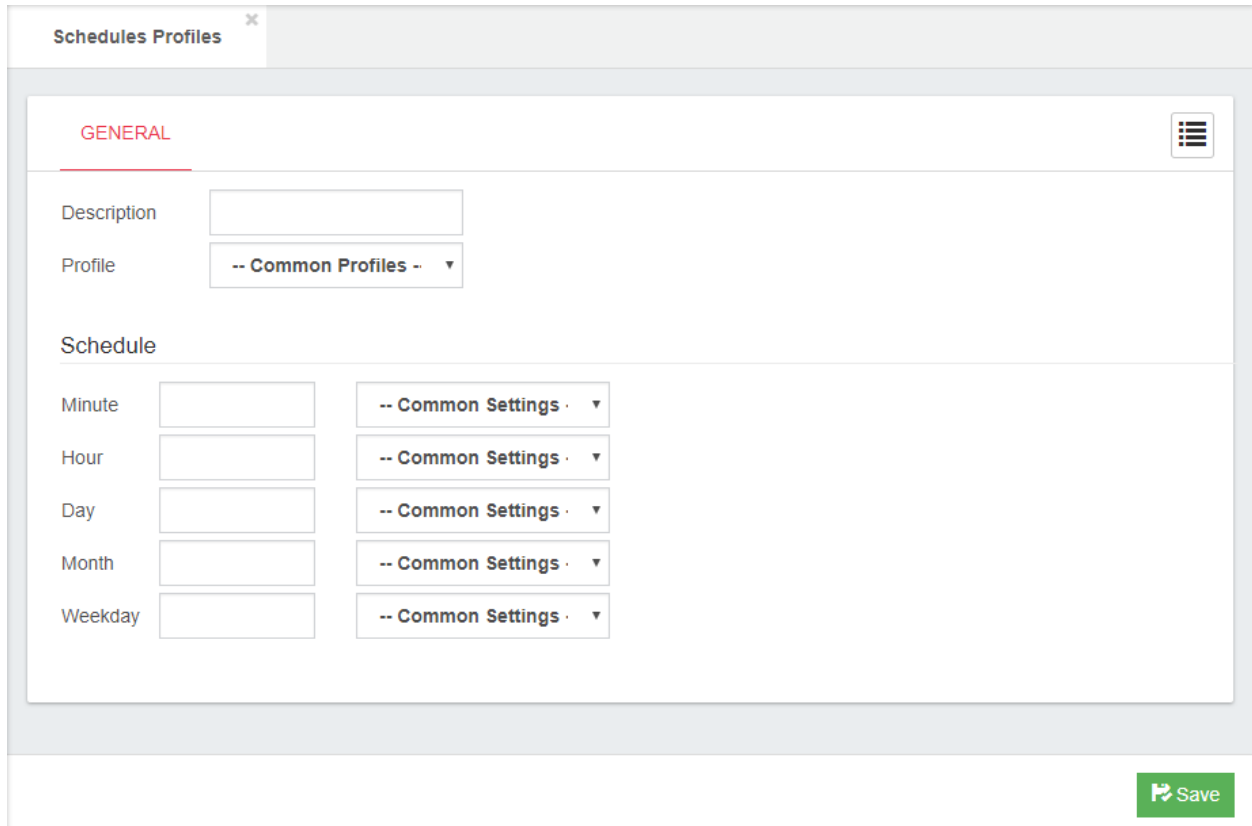
- Last N Days, makes it easier to delete recordings that are more than N days long. The execution of the task is associated with a Schedule.
- Less N Seconds, makes it easy to delete recordings of very short duration. The execution of the task is associated with a Schedule.

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

The screenshot shows the 'Maintenance' window with the 'CONFIGURATION' tab active and highlighted in red. The 'GENERAL' and 'CLEAR RECORDINGS' tabs are also visible. The configuration fields include: 'FTP Server' (text box), 'FTP Port' (text box with '21'), 'FTP Upload Path' (text box), 'FTP User' (text box with 'admin'), 'FTP Password' (text box with '*****'), and 'Public URL' (text box). There is a 'Test Configuration' section with an orange 'Test' button. A green 'Save' button is at the bottom right.

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.



The screenshot shows a web application window titled "Schedules Profiles" with a close button (X) in the top right corner. The main content area is divided into a "GENERAL" tab, which is currently selected and underlined in red. In the top right corner of the content area, there is a hamburger menu icon. Below the tab, there are three main sections: 1. "Description": A single-line text input field. 2. "Profile": A dropdown menu with the text "-- Common Profiles -" and a downward arrow. 3. "Schedule": A section containing five rows of time-based settings. Each row has a label on the left and a dropdown menu on the right. The labels are "Minute", "Hour", "Day", "Month", and "Weekday". The dropdown menus all contain the text "-- Common Settings ." and a downward arrow. At the bottom right of the window, there is a green "Save" button with a floppy disk icon.

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.

The screenshot shows a web interface for configuring filters. At the top, there is a tab labeled "Filters" with a close button (X). Below the tab, the "GENERAL" section is active, indicated by a red underline. The interface includes several input fields: "Description" (text input), "Team" (dropdown menu with "All" selected), "Extensions" (text input with a menu icon), and "Items" (a table for defining search criteria). The "Items" table has four columns: "Condition", "Search By", "Mode", and "Value". A row is currently defined with "AND" as the condition, "Called To" as the search field, "Begins With" as the mode, and an empty text input for the value. A green "Add" button is located to the right of the "Items" table. At the bottom right of the form, there is a green "Save" button with a floppy disk icon.

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.

The screenshot shows the 'Search Calls' interface. At the top, there is a 'GENERAL' tab. Below it, there are several filter fields: 'Filter' (set to 'None'), 'Team' (set to 'All'), 'Date' (range from '2017-10-18 00:00:00' to '2017-10-18 23:59:59'), and 'Reference'. To the right, there are input fields for 'Extensions', 'Note', and 'Destination'. Below the filters, there is a 'Show 10 entries' dropdown and 'CSV' and 'Save' buttons. The main part of the interface is a table with the following columns: Date, Time, Team, Extension, Calltype, Number, Duration, Rating, and Actions. The table contains 15 rows of call records. At the bottom, there is a 'Showing 1 to 10 of 15 entries' message and a pagination control with 'Previous', '1', '2', and 'Next' buttons. A 'Search' button is located at the bottom right of the interface.

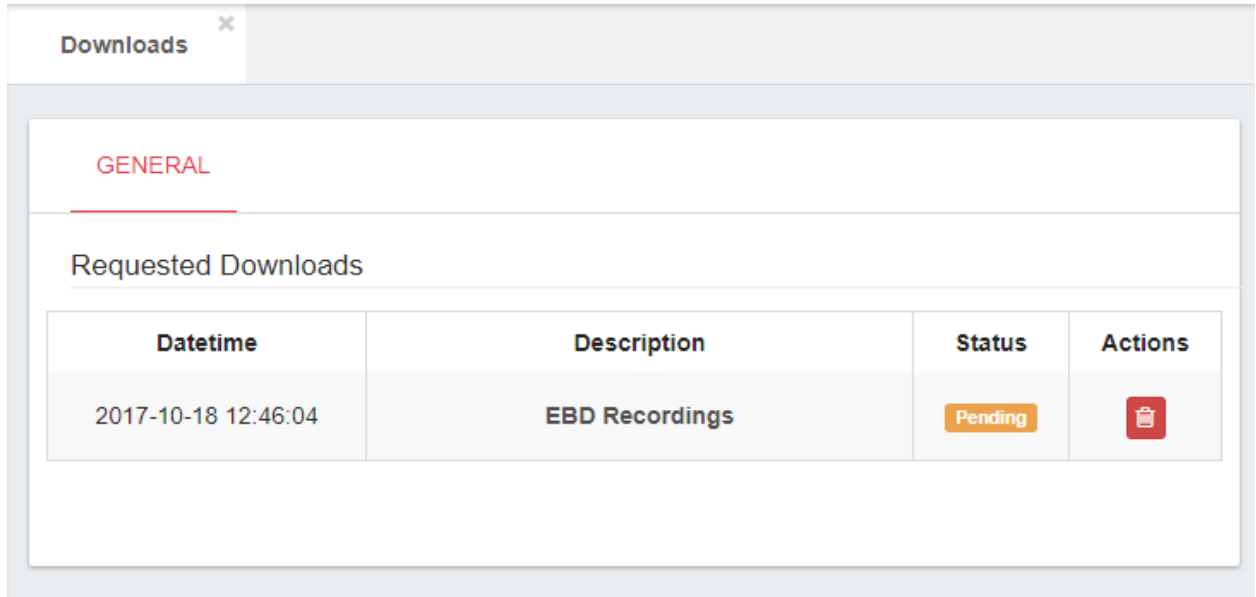
Date	Time	Team	Extension	Calltype	Number	Duration	Rating	Actions
2017-10-18	12:06:31	ADMINISTRACION	8253	→	922225031	00:01:26	☆☆☆☆☆	[Icons]
2017-10-18	11:32:13	ADMINISTRACION	8250	→	8255	00:00:13	☆☆☆☆☆	[Icons]
2017-10-18	11:32:13	ADMINISTRACION	8255	→	8250	00:00:13	☆☆☆☆☆	[Icons]
2017-10-18	10:56:23	ADMINISTRACION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

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

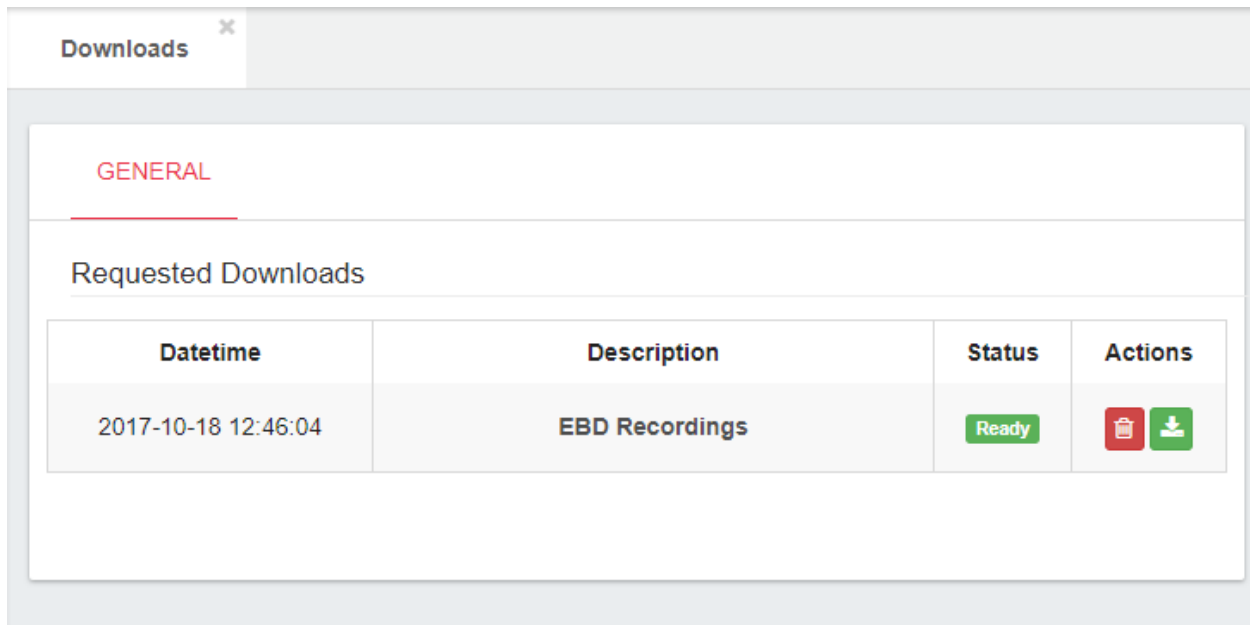
When one selects the option to export a report, this is the area where exported reports appear, so these can be downloaded.





The screenshot shows a web interface with a tab labeled 'Downloads'. Below the tab is a section titled 'GENERAL' with a red underline. Underneath is a heading 'Requested Downloads' followed by a table with the following data:

Datetime	Description	Status	Actions
2017-10-18 12:46:04	EBD Recordings	Pending	

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.



The screenshot shows the same web interface as above, but the status of the 'EBD Recordings' entry has changed to 'Ready'. The 'Actions' column now contains two icons: a trash icon and a download icon.


Datetime	Description	Status	Actions
2017-10-18 12:46:04	EBD Recordings	Ready	 

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.


GENERAL




Last Update
2017-10-18
18:14:34























Calls
5



Team
ADMINISTRACION



Extension
8255

Date	Time	Team	Extension	Calltype	Number	Duration	Actions
2017-10-18	17:32:13	ADMINISTRACION	8255	→	8250	00:00:13	   
2017-10-18	16:56:23	ADMINISTRACION	8255	→	254	00:00:14	   
2017-10-18	16:56:01	ADMINISTRACION	8255	←	8255	00:00:07	   
2017-10-18	15:49:35	ADMINISTRACION	8255	→	918001524	00:06:22	   
2017-10-18	14:32:01	ADMINISTRACION	8255	→	8251	00:00:06	   

Showing 1 to 5 of 5 entries

Previous 1 Next

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

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

Previous 1 2 Next

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