



SonataSuite

Recordings

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Introduction

Sonata Recordings 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 calls, 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.

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

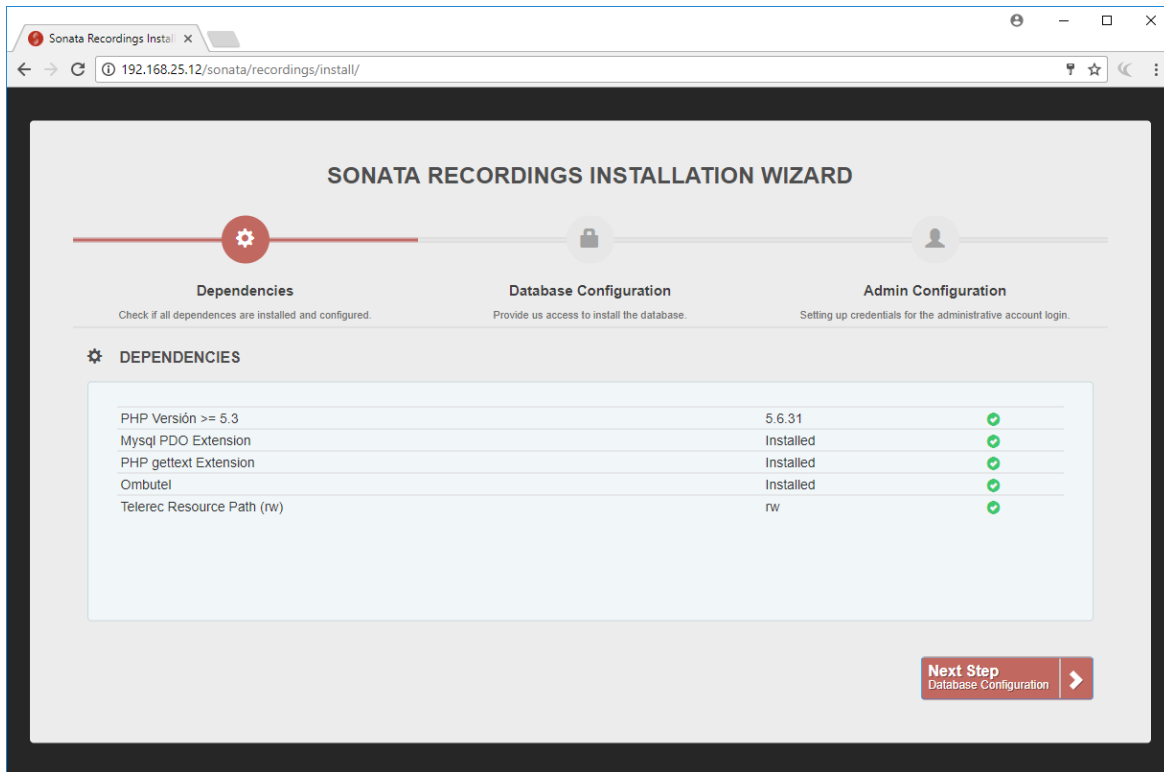
- SwitchBoard
- Billing System
- **Recordings Management System**
- Call Center Reports
- Stats (Call Center Reports)
- Dailer

1.- Installation

In your VitalPBX go to **Admin/Add-ons/Add-ons**, select Sonata Recording and press the install button  shown in the Actions column. Wait a couple of minutes and then click the Sonata Recordings link and start configuring.

1.1.- Press URL

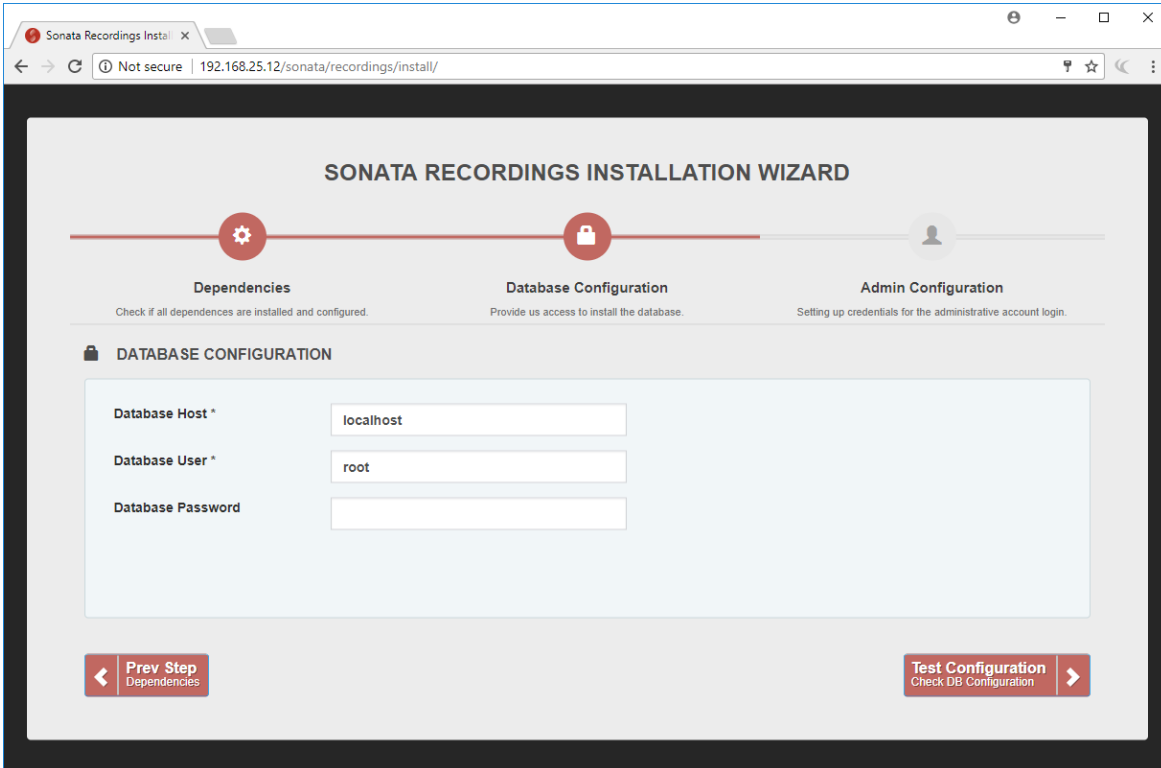
Press the URL in the Add-ons list.



a.- First check dependencies

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

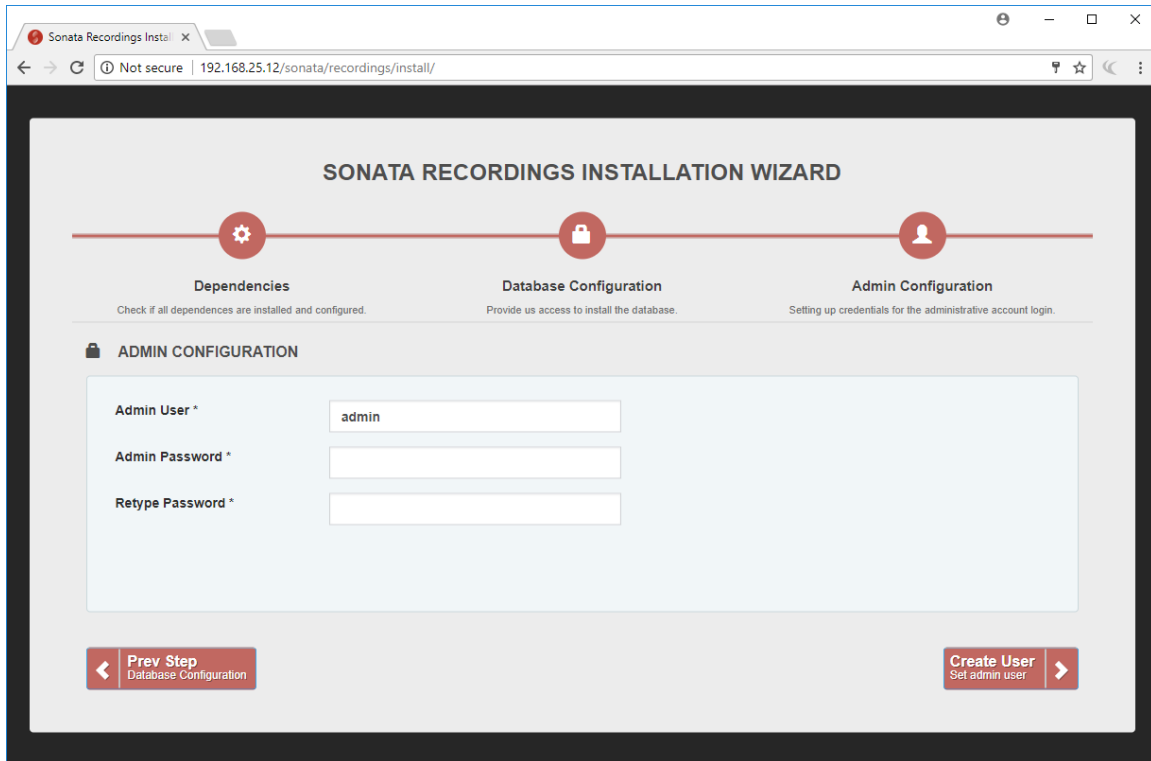
- **Database Host**, if you install Sonata Recordings on the same server where the PBX is installed and the CDRs are stored, it is recommended to select "localhost", otherwise enter the remote IP or host.
- **Database User**, user to access the MySQL database administrator. It is very important, as it 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 VitalPBX the root user does not have a password.



The screenshot shows a web browser window titled "Sonata Recordings Instal" with the URL "192.168.25.12/sonata/recordings/install/". The page is titled "SONATA RECORDINGS INSTALLATION WIZARD" and features a progress bar with three steps: "Dependencies" (gear icon), "Database Configuration" (lock icon), and "Admin Configuration" (user icon). The "Database Configuration" step is active. Below the progress bar, the "DATABASE CONFIGURATION" section contains three input fields: "Database Host *" with the value "localhost", "Database User *" with the value "root", and "Database Password" which is empty. At the bottom left, there is a "Prev Step" button with a left arrow and the text "Dependencies". At the bottom right, there is a "Test Configuration" button with a right arrow and the text "Check DB Configuration".

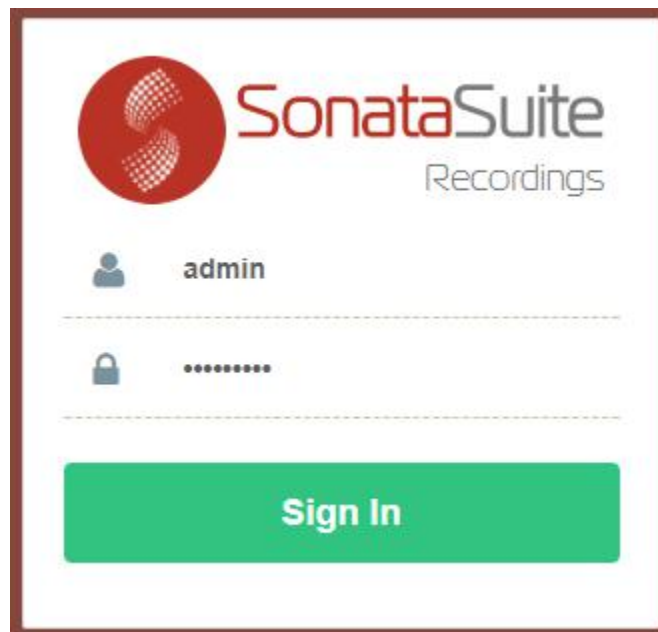
c.- The final step is to fill the following information

- **Username**, admin user to login into Sonata Recordings.
- **Password**, admin password.
- **Retype Password**, admin password again.



The screenshot shows a web browser window with the URL `192.168.25.12/sonata/recordings/install/`. The page title is "SONATA RECORDINGS INSTALLATION WIZARD". A progress bar at the top indicates three steps: "Dependencies" (checked), "Database Configuration" (checked), and "Admin Configuration" (active). Below the progress bar, the "ADMIN CONFIGURATION" section contains three input fields: "Admin User *" with the value "admin", "Admin Password *", and "Retype Password *". At the bottom, there are two buttons: "Prev Step Database Configuration" and "Create User Set admin user".

d.- Login with the user and password previously created.



The screenshot shows the login page for Sonata Suite Recordings. The logo is a red circle with a white 'S' inside. Below the logo, the text "SonataSuite Recordings" is displayed. There are two input fields: the first is labeled "admin" and the second is a password field with masked characters. A green "Sign In" button is located at the bottom of the form.

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 provides pagination controls (Previous, 1, 2, 3, 4, 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]

3.- Settings

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**:

The screenshot shows the 'Flags Profiles' configuration window. The 'GENERAL' tab is selected. The 'Description' field is set to 'SDOPORTE'. Under the 'Flags' section, there is a table with the following data:

Name	Color
Soporte	Red
Contrato	Blue
Soporte en Linea	Green

Each row in the table includes a delete icon. An 'Add' button is located below the table. At the bottom right of the window, there are three buttons: 'Update', 'Delete', and 'Cancel'.

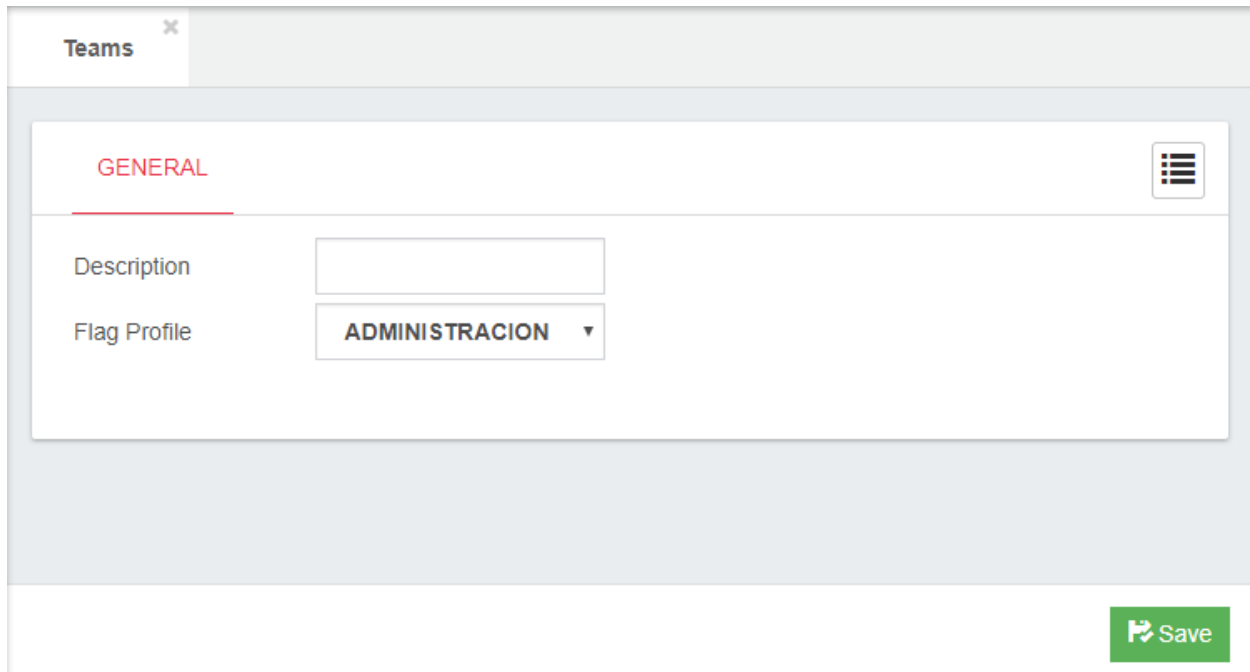
In Flag Profiles the following data must be configured:

- **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.

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 displays the 'Teams' configuration page. At the top, there is a tab labeled 'Teams' with a close icon. Below the tab, the 'GENERAL' section is highlighted in red. This section contains two fields: 'Description' with an empty text input box, and 'Flag Profile' with a dropdown menu currently set to 'ADMINISTRACION'. A green 'Save' button with a refresh icon is located at the bottom right of the form.

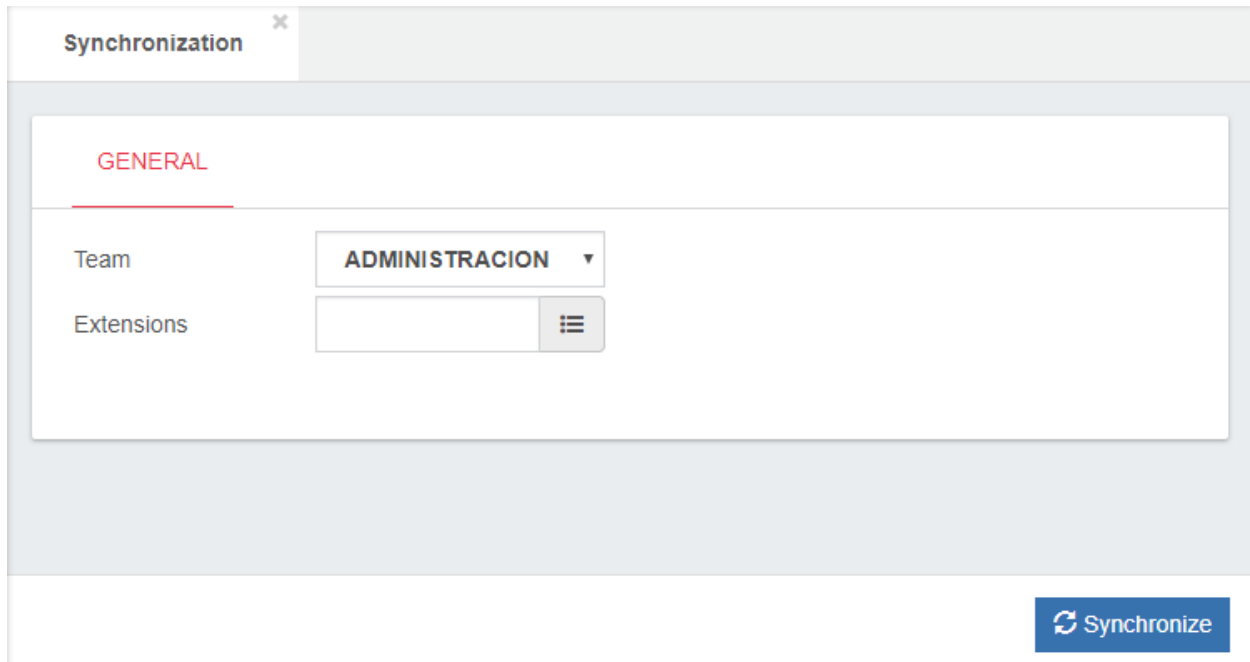
In Teams the following data must be configured:

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

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**:



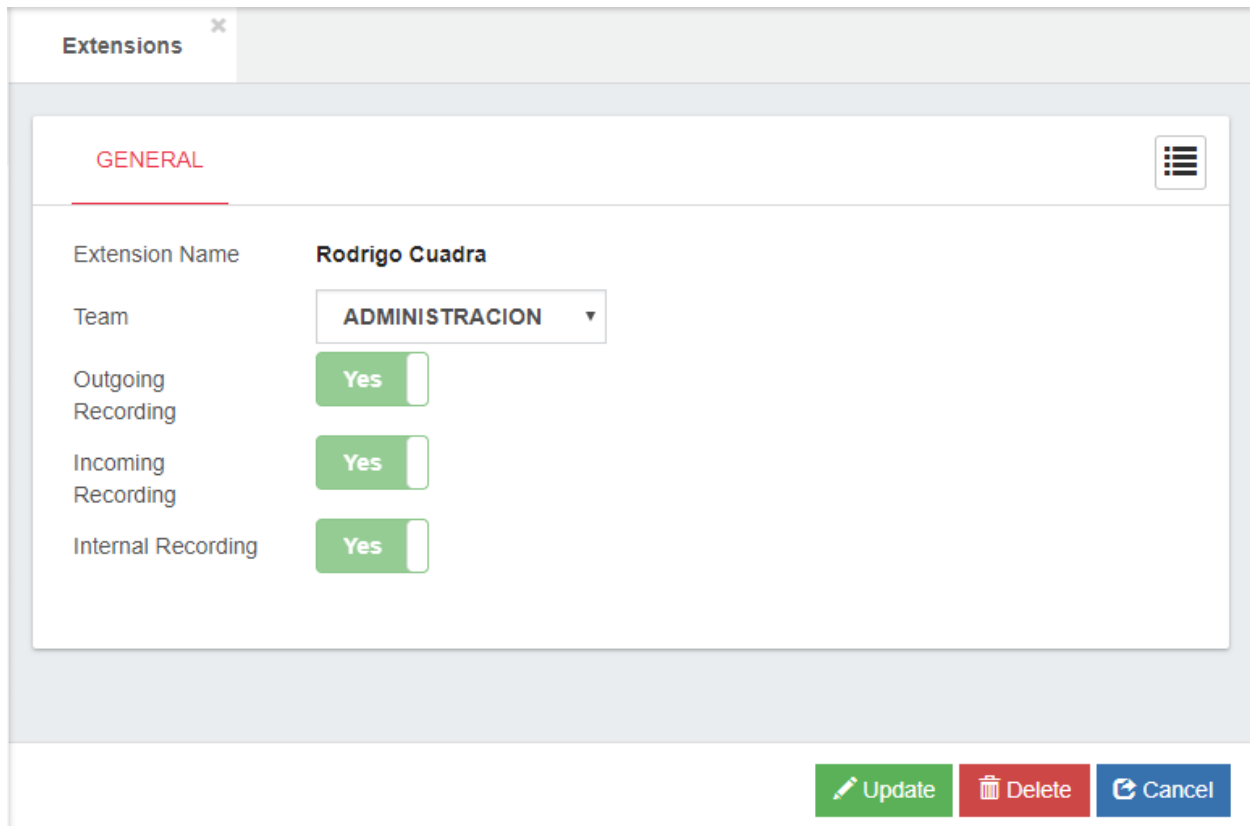
The screenshot shows a web interface for the 'Synchronization' settings. At the top, there is a tab labeled 'Synchronization' with a close button (x). Below the tab, the 'GENERAL' section is visible. It contains two configuration fields: 'Team' with a dropdown menu currently set to 'ADMINISTRACION', and 'Extensions' with an empty input field and a menu icon (three horizontal lines). At the bottom right of the form, there is a blue button labeled 'Synchronize' with a refresh icon.

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.

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 configuration options:

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

At the bottom right of the form, 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.

3.5.- User Profiles

Sonata Recordings 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. At the top, there's a tab labeled 'Users Profiles'. Below it, the 'GENERAL' tab is active. The form includes:

- Name:** A text input field.
- Type:** A dropdown menu currently showing 'Administrator'.
- Permissions:** A button labeled 'Allow Listening R...' with a menu icon.
- Unselected Modules:** A list box with an 'Add all' button, currently empty.
- Selected Modules:** A list box with a 'Remove all' button, containing the following modules:

Flag Profiles	x
Search Calls	x
Extensions	x
Users	x
Users Profiles	x
Teams	x
Panel	x
Downloads	x
Filters	x
Activations	x
Synchronization	x
Maintenance	x
Schedules Profiles	x

A green 'Save' button is located at the bottom right of the form.

- **Name**, name for this User Profile.
- **Type**, it defines the type of profile. On the user's dialog, depending on the selected user type, the profile dropdown will be populated with profiles that have the same type as the user type.
 - **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.
- **Permissions**, it allows you to select what permissions or actions has the user.
 - Add Notes, allows the user to create notes related to the recording.

- **Add Flags**, allows user to assign flags related to the recording.
- **Add References**, allows the user to associate the recording with a reference.
- **Allow Listening Recording**, allows the user to listen to recordings.
- **Create Reports**, allows the user to create reports.
- **Allow Delete**, allows user to delete recordings.
- **Selected Modules**, select the modules that the user will be able to enter.

Select Permissions

Add all	Remove all
	Allow Listening Recordings x
	Add Notes x
	Add Flags x
	Add References x
	Allow Deleting Recordings x
	Create Reports x

Cancel Accept

3.6.- Users

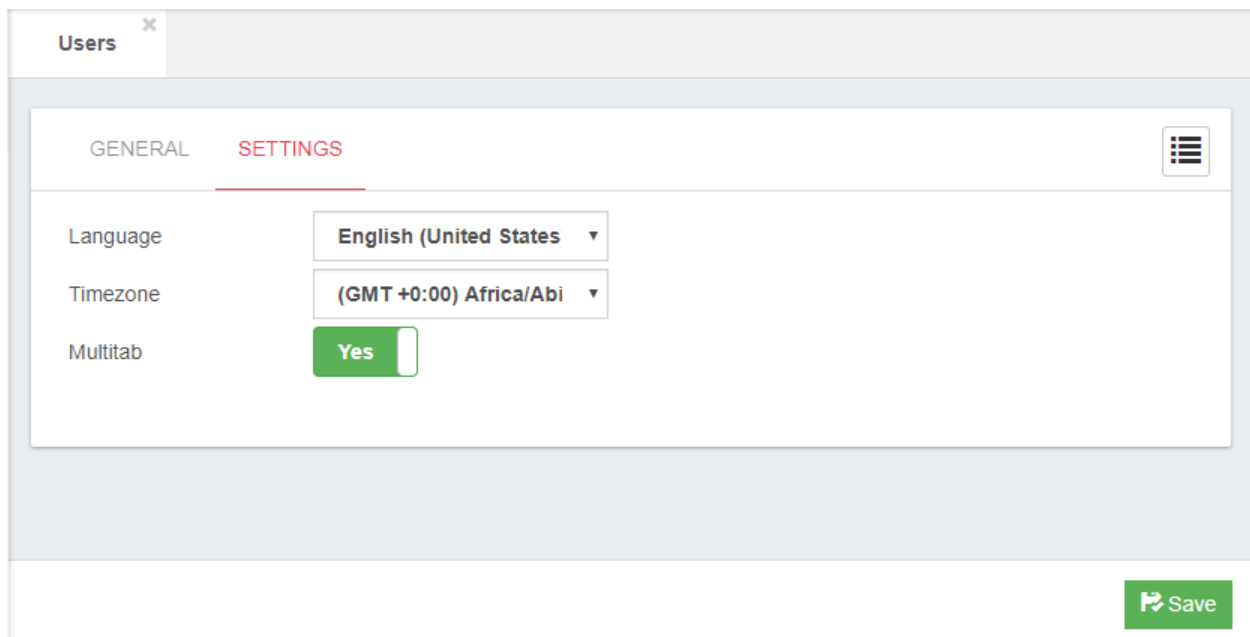
Sonata Recordings allows us to create users with different types of privileges, to create the Users it is necessary to go to **Settings/Users**. Each user will be associated with a User Profile, which must have been previously created.

In Users the options to configure are the following:

- **Full Name**, full name of user.
- **User Name**, name used to login.
- **Password**, your secure password for login.
- **User Type**, we have 4 types of users:
 - **Agent**, just for the extension's 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.
- **Profile**, profile for this User.
- **Startup Dialog**, which dialog to be displayed when logging into the system.
- **Department**, user Department (Example: Development).
- **Tenant**, tenant to whom belongs this user.
- **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.
- **Select Image**, user avatar.

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 floppy disk icon is located at the bottom right of the settings panel.

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.

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:

- **Clear Oldest Recording**, allows you to defined the maximum number of days that recordings should be retained. The recordings with more age than the days defined here will be deleted.
- **Clear Short Recordings**, allows you to define the minimum duration in seconds for a recording to be considered as too short, and delete it.
- **Schedule**, schedule used to run the process.
- **Backup Recordings**, it allows you to define if recordings will be backed up on a different place (Directory or FTP Server).
- **Directory**, when you select directory, the recordings are moved to the configured directory.
- **Convert Recordings**, Convert recordings to MP3 format.
- **Move After Convert**, move the recordings after you convert them.

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

The screenshot shows a web interface for configuring FTP settings. The main window is titled 'Maintenance' and has a sub-tab 'FTP CONFIGURATION'. The configuration fields are:

- FTP Server
- FTP Port
- FTP Upload Path
- FTP User
- FTP Password (masked with dots)
- Public URL

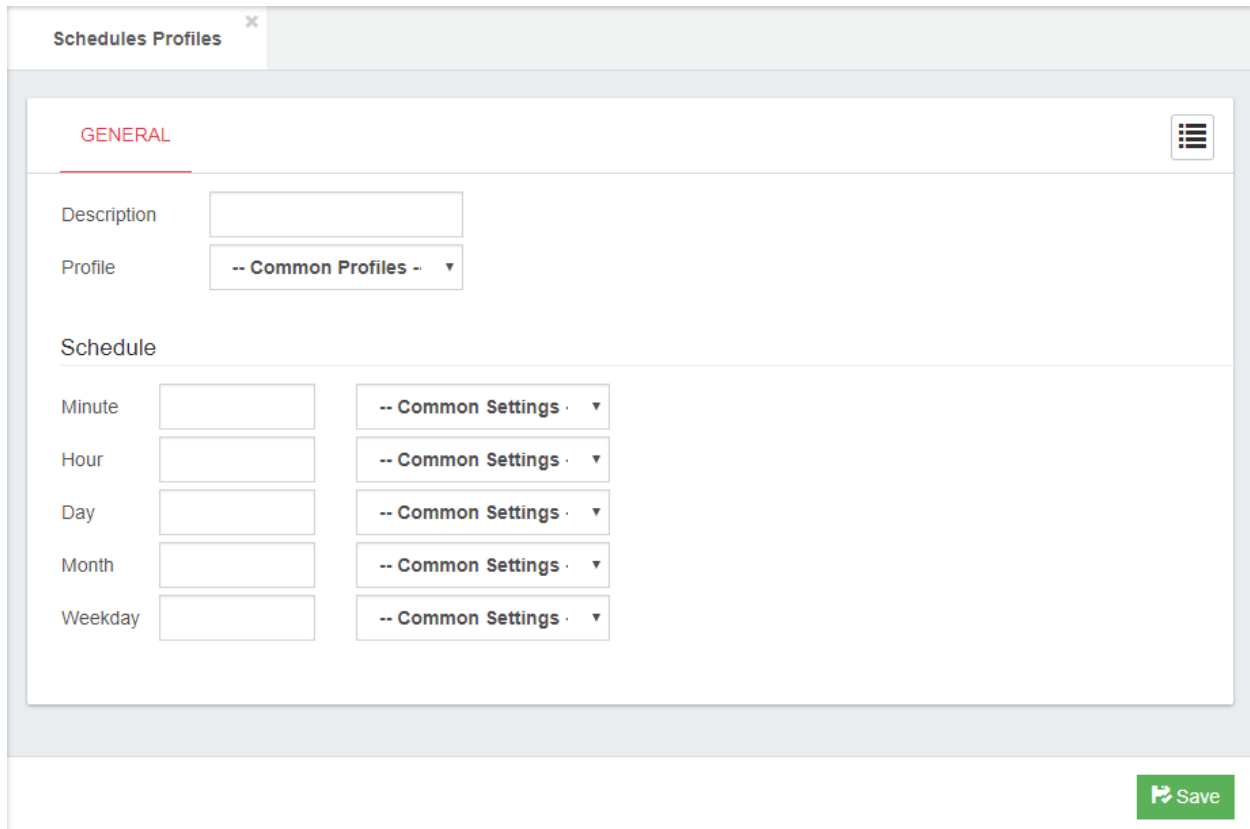
Below the input fields is a 'Test Configuration' section with a 'Test' button. At the bottom right of the form is a green 'Save' button.

In FTP the options to configure are the following:

- **FTP Server**, FTP Server to move the recordings.
- **FTP Port**, FTP Port.
- **FTP Upload Path**, path to upload the recordings, this path must be created previously.
- **FTP User**, user for access to FTP Server.
- **FTP Password**, password for access to FTP Server.
- **Public URL**, Public URL to play the Recordings. You must configure this url before move the recordings. This url must be reachable via browser, i.e, http://my_ftp_server/my_recordings.

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 interface for configuring Schedules Profiles. The page title is "Schedules Profiles" with a close button (x). The main content area is titled "GENERAL" and contains the following fields:

- Description:
- Profile:
- Schedule section with five rows:
 - Minute:
 - Hour:
 - Day:
 - Month:
 - Weekday:

A green "Save" button is located at the bottom right of the form.

4.- Reports

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 the 'Filters' configuration window. At the top, there's a 'Filters' tab with a close button. Below it, the 'GENERAL' tab is active. The form includes:

- Description:** A text input field.
- Team:** A dropdown menu currently set to 'All'.
- Extensions:** A text input field with a list icon on the right.
- Items:** A section for defining search criteria with a table:

Condition	Search By	Mode	Value
AND	Called To	Begins With	

A green 'Add' button is located to the right of the 'Items' table. At the bottom right of the window, there is a green 'Save' button.

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.

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 displays the 'Search Calls' interface. At the top, there is a 'GENERAL' section with 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), Reference, Extensions, Note, and Destination. Below the filters, there is a 'Show 10 entries' dropdown and 'CSV' and 'Save' buttons. The main area contains a table with the following columns: Date, Time, Team, Extension, Calltype, Number, Duration, Rating, and Actions. The table lists 10 call records. At the bottom, there is a 'Showing 1 to 10 of 15 entries' indicator and a pagination control with 'Previous', '1', '2', and 'Next' buttons. A green 'Search' button is located at the bottom right of the interface.

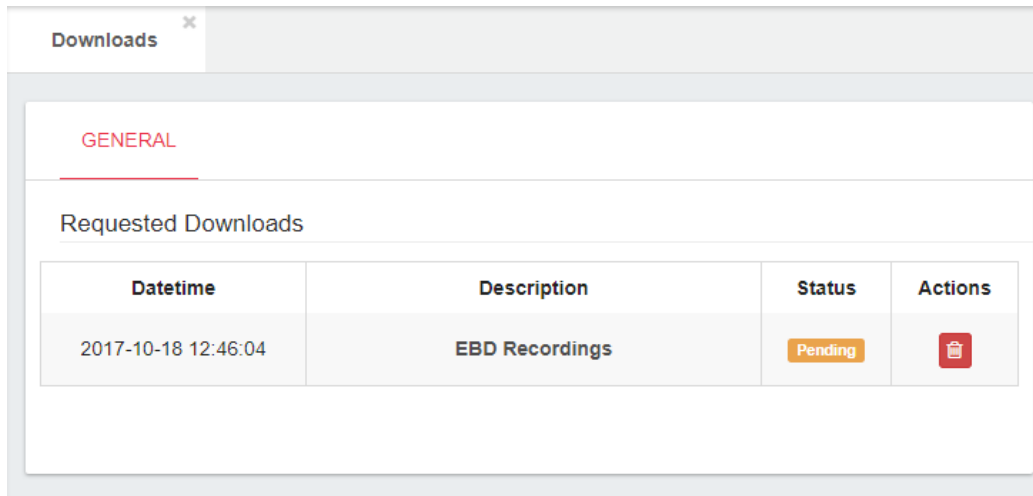
Date	Time	Team	Extension	Calltype	Number	Duration	Rating	Actions
2017-10-18	12:06:31	ADMINISTRACION	8253	→	922225031	00:01:26	☆☆☆☆☆	[Icons]
2017-10-18	11:32:13	ADMINISTRACION	8250	→	8255	00:00:13	☆☆☆☆☆	[Icons]
2017-10-18	11:32:13	ADMINISTRACION	9255	→	8250	00:00:13	☆☆☆☆☆	[Icons]
2017-10-18	10:56:23	ADMINISTRACION	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	9270	→	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	10:23:56	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.

4.3.- Downloads

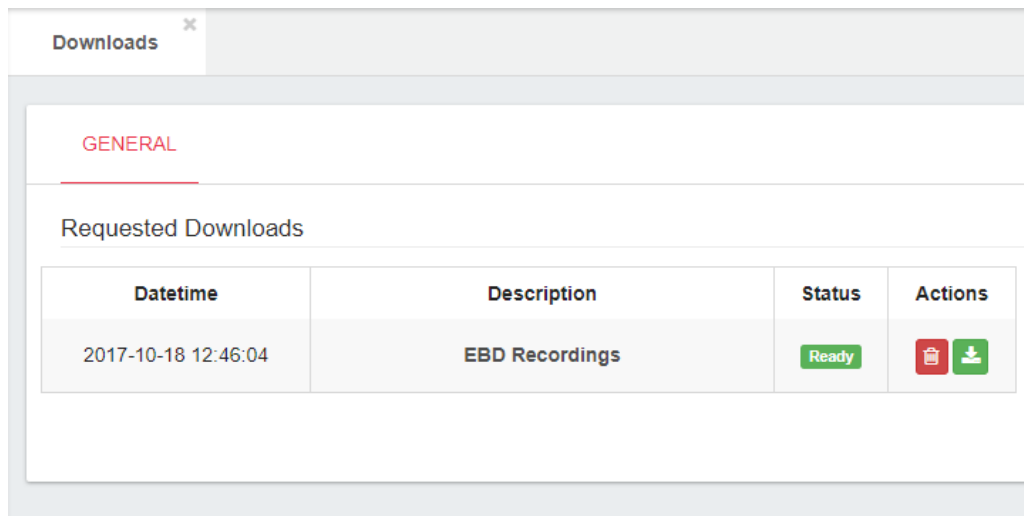
When one selects the option to export a report, this is the area where exported reports appear, so these can be downloaded.



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. The table has four columns: "Datetime", "Description", "Status", and "Actions". The first row contains the following data: "2017-10-18 12:46:04", "EBD Recordings", "Pending" (in a yellow box), and a red trash icon.

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 the previous one, but the status of the "EBD Recordings" entry has changed to "Ready" (in a green box). The "Actions" column now contains two icons: a red trash icon and a green download icon.


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

5.- Panel


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.

5.2.- 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.

A.- Technical Specification

Name	Sonata Recording
Version	3.0.0-1
OS	Linux Centos 7 64 bits
Compatibility	VitalPBX 3.x
Database	MariaDB 10.x
Developed Language	PHP 7, HTML
Necessary Memory	2 GB
Necessary HDD	250 MB
Packet Technology	RPM
Dependency	Already installed in VitalPBX 3.x