

vitalpbx.com



SonataSuite
Recordings



Call Recordings
Management

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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:

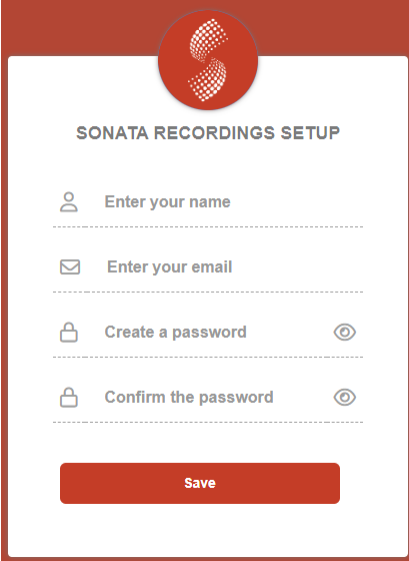
- SwitchBoard
- Billing System
- **Recordings Management System**
- Stats (Call Center Reports)
- Dailer

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.

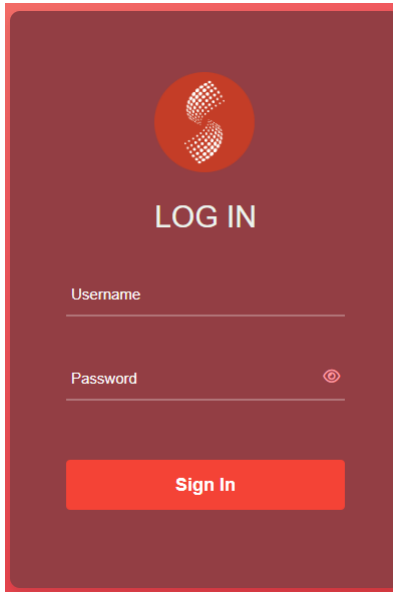


The screenshot shows a web form titled "SONATA RECORDINGS SETUP". At the top center is a circular logo with a red and white pattern. Below the title are four input fields, each with a small icon to its left: a person icon for "Enter your name", an envelope icon for "Enter your email", a padlock icon for "Create a password", and another padlock icon for "Confirm the password". Each field has a dotted line below it. To the right of the password fields are eye icons for toggling visibility. At the bottom center is a red button labeled "Save".

The first time we enter we must add the following information.

- **Enter your name**, Enter your full name.
- **Enter your email**, Enter your email address.
- **Create a password**, Enter the password to be used by the **admin** user.
- **Confirm the password**, Confirmation of password entered previously.

Login with the Username **admin** and password previously created.



The image shows a login form for Sonata Recordings. It features a dark red background with a lighter red circular logo at the top center containing a stylized 'S'. Below the logo, the text 'LOG IN' is displayed in white. There are two input fields: 'Username' and 'Password'. The 'Password' field includes a small eye icon to the right, indicating a toggle for password visibility. At the bottom of the form is a red button with the text 'Sign In' in white.

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 Sonata Suite Recordings Admin Panel. The interface includes a top navigation bar with the Sonata Suite logo and the user's name, Jose Rivera. A left sidebar contains navigation options: PANEL, REPORTS, and SETTINGS. The main content area displays a table of call recordings under the 'GENERAL' tab. The table has columns for Date/Time, Team, From, Caller ID, To, Call Type, Duration, and Actions. Below the table, it indicates 'Showing 1 to 5 of 5 entries' and includes 'Previous', '1', and 'Next' navigation buttons.

Date/Time	Team	From	Caller ID	To	Call Type	Duration	Actions
2023-10-28 13:09:56	Default	"[EN]Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:28	[Icons]
2023-10-28 13:09:56	Default	"[EN]Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:28	[Icons]
2023-10-28 13:04:11	Default	"Rodrigo Cuadra" <2000>	2000	2800	Internal	00:00:34	[Icons]
2023-10-28 12:47:40	Default	"Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:12	[Icons]
2023-10-28 12:47:40	Default	"Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:12	[Icons]

Showing 1 to 5 of 5 entries

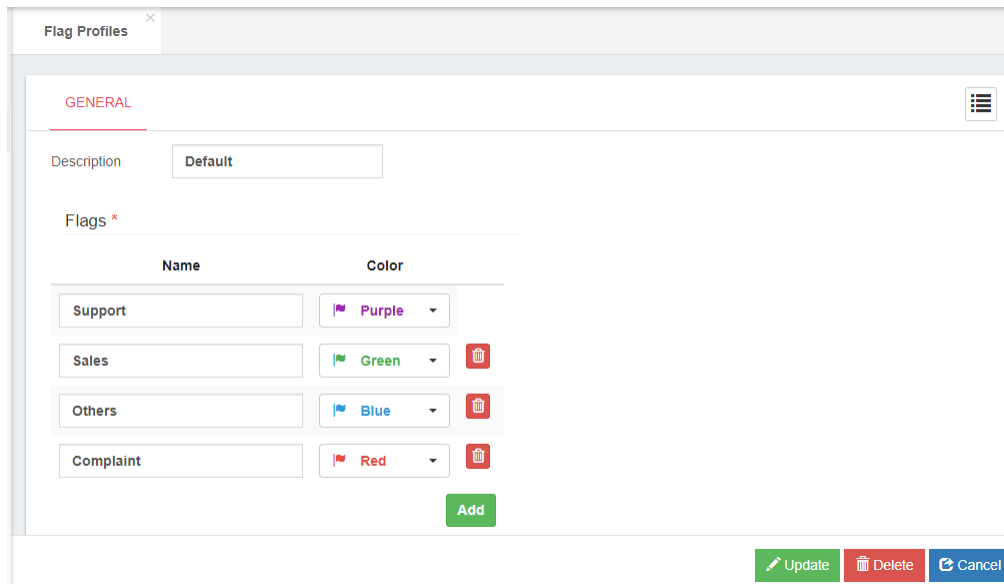
Previous 1 Next

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 a web interface titled "Flag Profiles" with a close button (X) in the top right corner. The main content area is labeled "GENERAL" and contains a "Description" field with the value "Default". Below this is a section for "Flags *", which is a table with two columns: "Name" and "Color". The table lists four flags: "Support" (Purple), "Sales" (Green), "Others" (Blue), and "Complaint" (Red). Each flag entry has a red trash icon to its right. At the bottom of the table is a green "Add" button. Below the table are three buttons: "Update" (green), "Delete" (red), and "Cancel" (blue).

Name	Color
Support	Purple
Sales	Green
Others	Blue
Complaint	Red

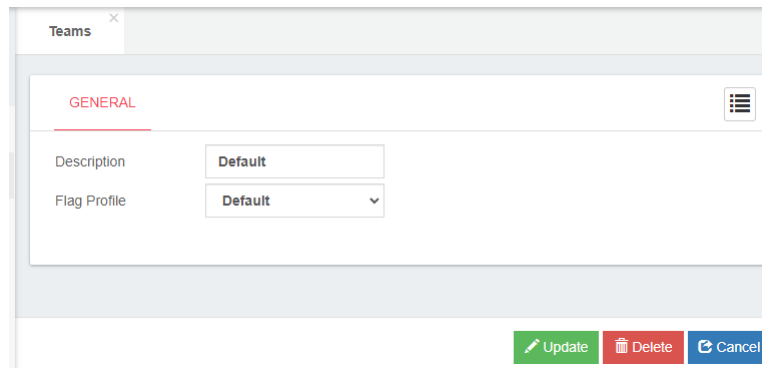
In Flag Profiles the following data must be configured:

- **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 shows a web form titled "Teams" with a "GENERAL" tab. The form contains two fields: "Description" with a text input field containing "Default", and "Flag Profile" with a dropdown menu also set to "Default". At the bottom right of the form are three buttons: "Update" (green), "Delete" (red), and "Cancel" (blue).

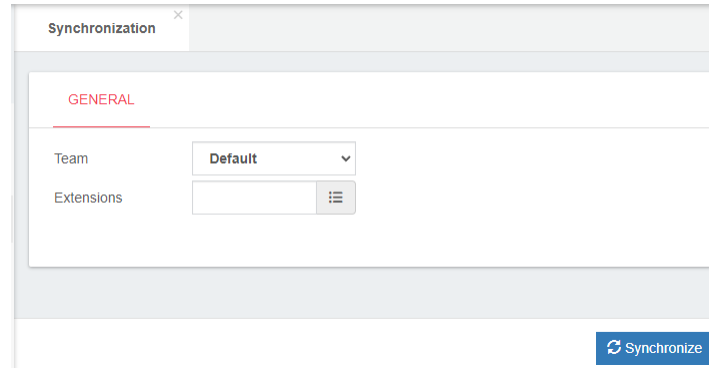
In Teams the following data must be configured:

- **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**:

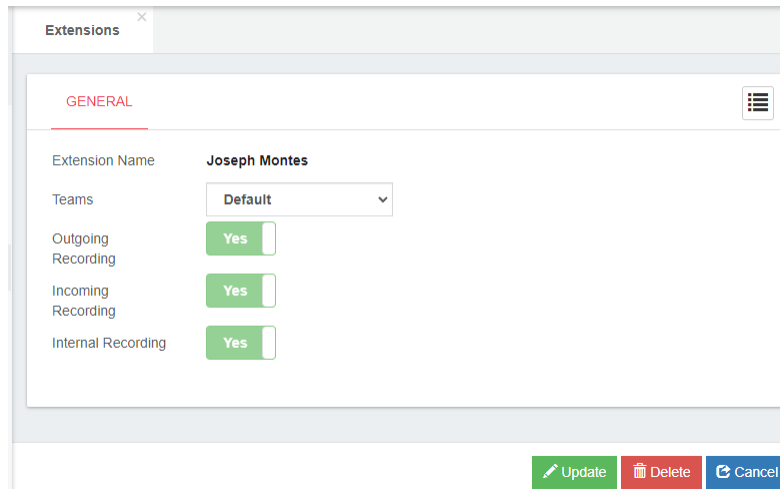


In Synchronization the following data must be configured:

- **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-based configuration window titled "Extensions". The window has a "GENERAL" tab selected. The configuration details are as follows:

Field	Value
Extension Name	Joseph Montes
Teams	Default
Outgoing Recording	Yes
Incoming Recording	Yes
Internal Recording	Yes

At the bottom of the window, there are three buttons: "Update" (green), "Delete" (red), and "Cancel" (blue).

In Extensions you can configure the following options:

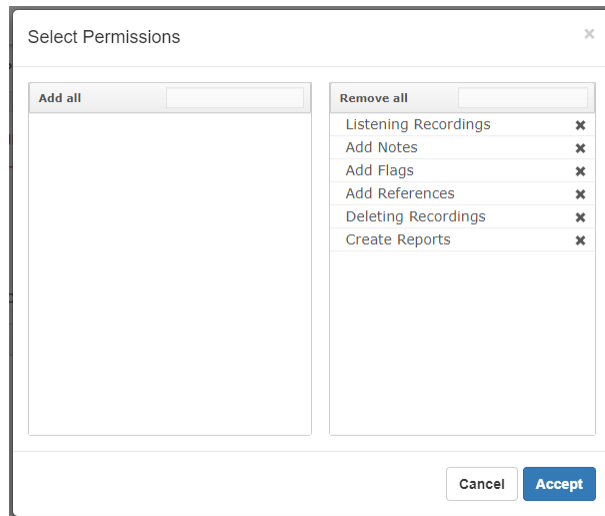
- **Team**, Name of the Team that the extensions belong to.
- **Outgoing Recording**, If the outgoing calls are to be recorded.
- **Incoming Recording**, If the incoming calls are to be recorded.
- **Internal Recording**, If the internal calls are to be recorded.

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' dialog box. The 'GENERAL' tab is active. The 'Name' field is set to 'Administrator', and the 'Type' dropdown is also set to 'Administrator'. The 'Permissions' field is set to 'Listening Recordings...'. Below these are two lists: 'Unselected Modules' (empty) and 'Selected Modules' (containing 14 items with 'x' icons). At the bottom are 'Update', 'Delete', and 'Cancel' buttons.

- **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.



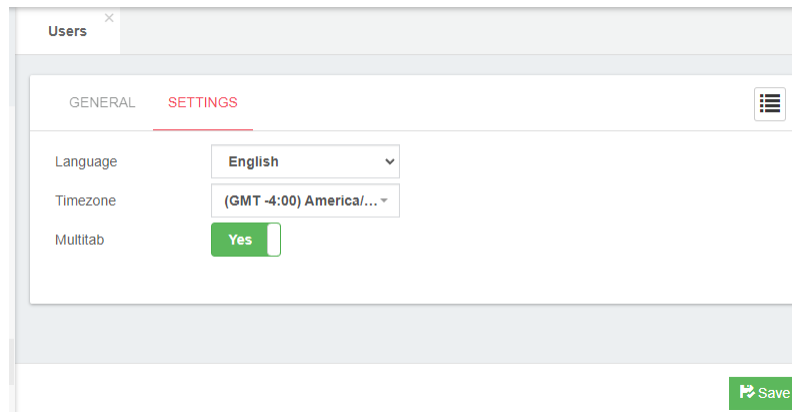
3.6.- Users

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.

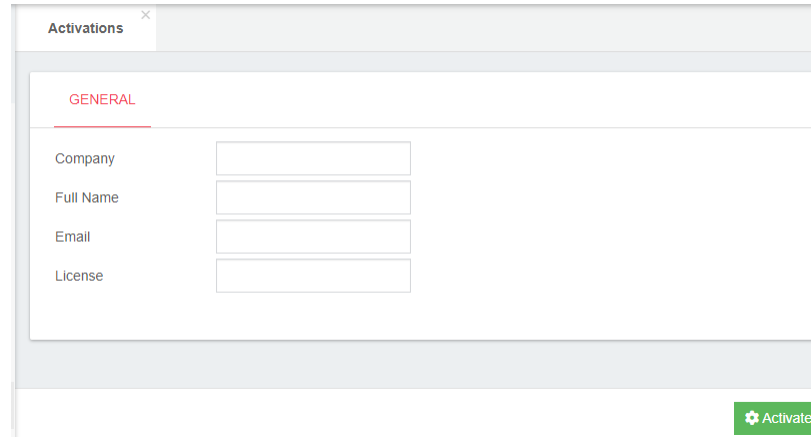


The screenshot shows a web application window titled "Users" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "GENERAL" and "SETTINGS", with "SETTINGS" being the active tab. The "SETTINGS" tab contains three configuration items: "Language" with a dropdown menu set to "English", "Timezone" with a dropdown menu set to "(GMT -4:00) America/...", and "Multitab" with a green "Yes" button. At the bottom right of the window, there is a green "Save" button with a floppy disk icon.

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.- Activation

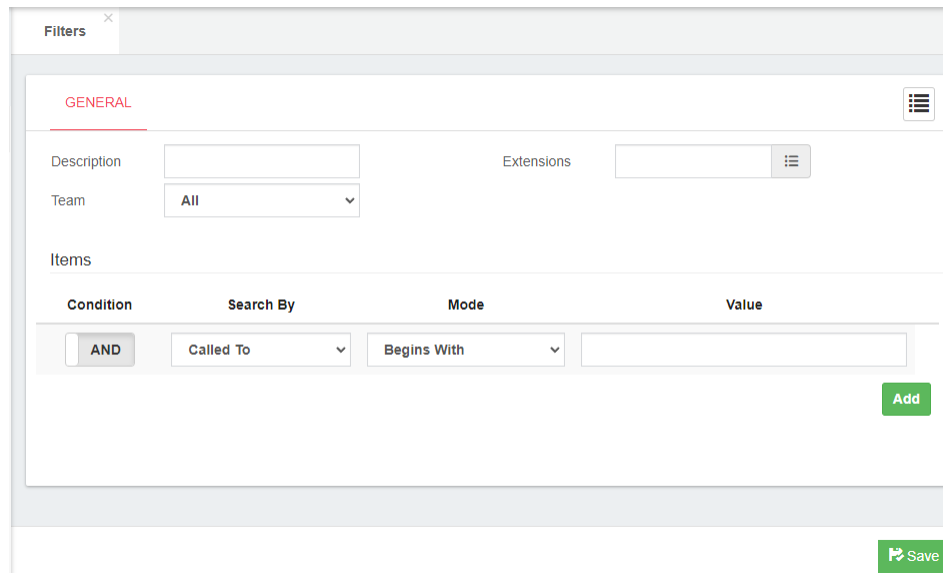


The screenshot shows a web application window titled "Activations" with a close button (X) in the top right corner. Below the title bar, there is a single tab labeled "GENERAL". The "GENERAL" tab contains four input fields: "Company", "Full Name", "Email", and "License". At the bottom right of the window, there is a green "Activate" button with a gear icon.

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 a 'Filters' dialog box with a 'GENERAL' tab. It contains several input fields: 'Description', 'Extensions', and 'Team' (set to 'All'). Below these is an 'Items' section with a table for defining search criteria. The table has columns for 'Condition', 'Search By', 'Mode', and 'Value'. One item is configured with 'AND' as the condition, 'Called To' as the search field, and 'Begins With' as the mode. A green 'Add' button is next to the item, and a 'Save' button is at the bottom right.

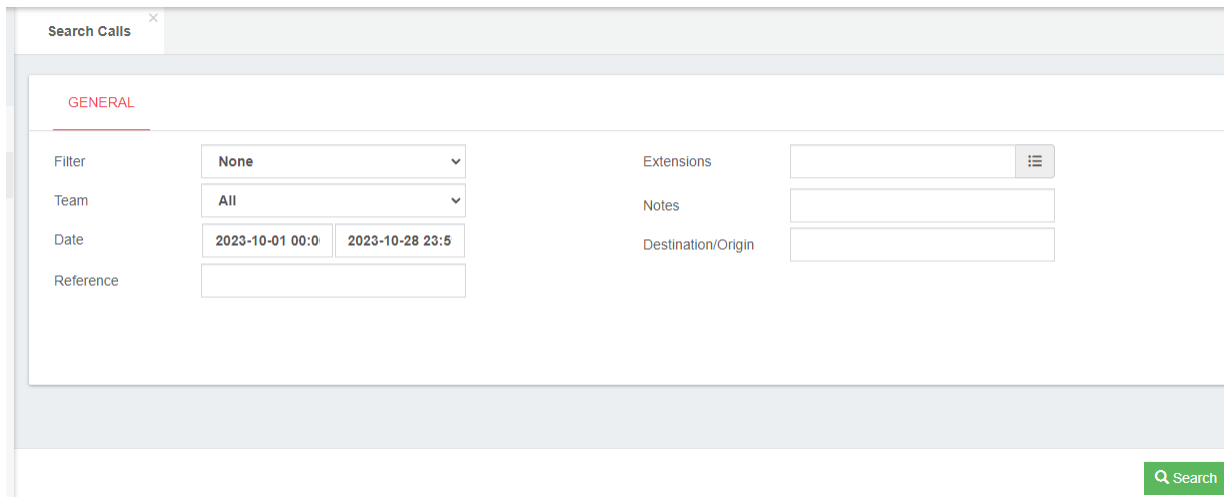
Condition	Search By	Mode	Value
AND	Called To	Begins With	

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 shows a web interface titled "Search Calls" with a "GENERAL" tab. The interface contains several search filters:

- Filter:** A dropdown menu set to "None".
- Team:** A dropdown menu set to "All".
- Date:** Two date range input fields. The first is "2023-10-01 00:0" and the second is "2023-10-28 23:5".
- Reference:** A text input field.
- Extensions:** A text input field with a menu icon to its right.
- Notes:** A text input field.
- Destination/Origin:** A text input field.

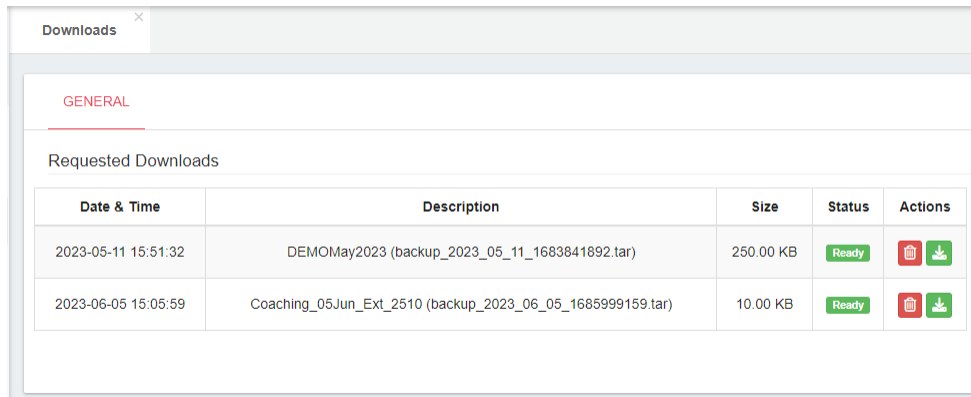
A green "Search" button with a magnifying glass icon is located at the bottom right of the form.

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/Origin**, called number or number where the call originated.

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 window titled "Downloads" with a "GENERAL" tab. Below the tab is the heading "Requested Downloads" and a table with the following data:

Date & Time	Description	Size	Status	Actions
2023-05-11 15:51:32	DEMOMay2023 (backup_2023_05_11_1683841892.tar)	250.00 KB	Ready	 
2023-06-05 15:05:59	Coaching_05Jun_Ext_2510 (backup_2023_06_05_1685999159.tar)	10.00 KB	Ready	 


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.

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
2023-10-28 17:10:54







Calls
4



Team
Default



Extension
2003

Date/Time	Team	From	Caller ID	To	Call Type	Duration	Actions
2023-10-28 15:09:56	Default	"[EN]Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:28	
2023-10-28 15:09:56	Default	"[EN]Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:28	
2023-10-28 14:47:40	Default	"Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:12	
2023-10-28 14:47:40	Default	"Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:12	

Showing 1 to 4 of 4 entries


























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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	From	Caller ID	To	Call Type	Duration	Actions
2023-10-28 13:09:56	Default	"[EN]Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:28	    
2023-10-28 13:09:56	Default	"[EN]Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:28	    
2023-10-28 13:04:11	Default	"Rodrigo Cuadra" <2000>	2000	2800	Internal	00:00:34	    
2023-10-28 12:47:40	Default	"Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:12	    
2023-10-28 12:47:40	Default	"Rodrigo Cuadra" <2000>	2000	2003	Internal	00:00:12	    

Showing 1 to 5 of 5 entries

Previous 1 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	4.0.0-1
OS	Linux Debian 11 64 bits
Compatibility	VitalPBX 4.x
Database	MariaDB 10.x
Developed Language	PHP 8, HTML
Necessary Memory	2 GB
Necessary HDD	250 MB
Packet Technology	DEB
Dependency	Already installed in VitalPBX 4.x