Employee-

Role

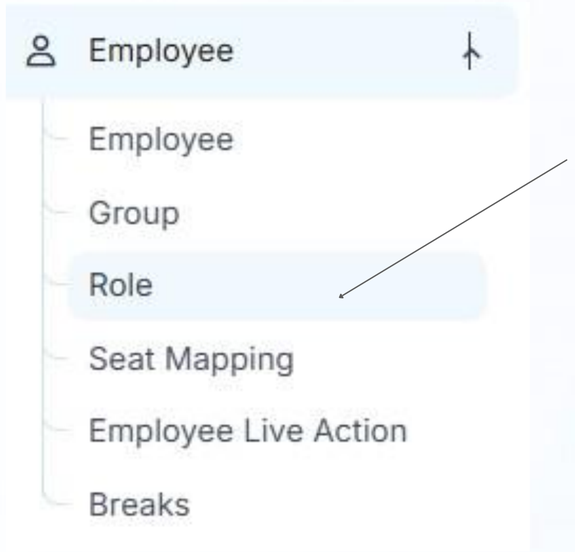
Hashmi Infonet User Guide

Mumbai, India

info@hashmitelecom.in

+91-8097064186

Role



AGENT LIST

Role List

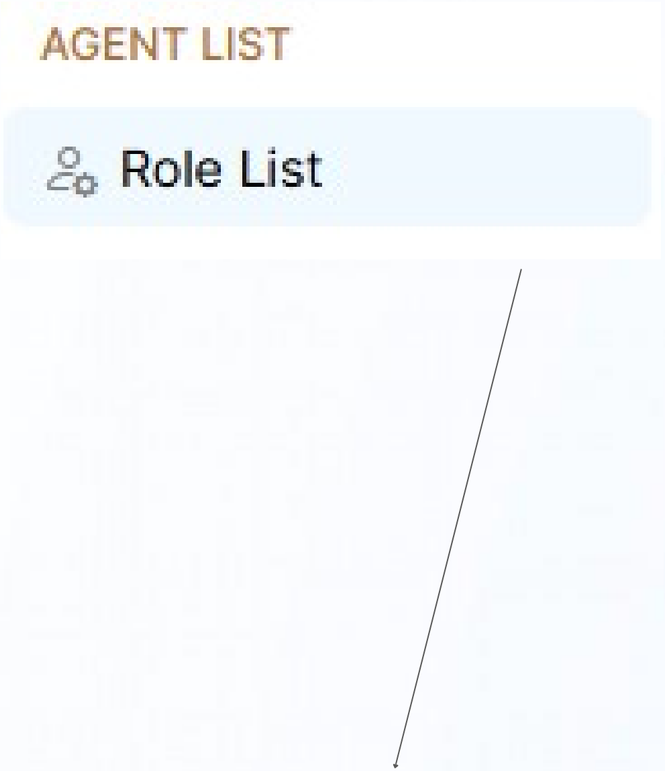
ACTION

Add Role

Role 7

Role	Created By	Employee	Create Date	Status	Action
#1 Test_Role	22134602	138	09 Jun 57655 7:09:34 AM	Active	
#8 V4_role	22134602	2	16 Sept 2025 3:13:47 PM	Active	
#10 Test	22134602	1	25 Sept 2025 11:20:37 AM	Active	
#13 Radhe-Test-Role	22134602	0	01 Oct 2025 11:43:04 AM	Active	
#17 Supervisor	22134602	0	07 Nov 2025 10:52:00 AM	Active	
#18 Supervisor	22134602	0	07 Nov 2025 10:52:09 AM	Active	
#20 Role_111	22134602	1	13 Nov 2025 12:10:16 PM	Active	

Role



The Role List displays all available roles along with their usage and current status. It helps admin to manage role configurations and monitor how roles are assigned across employees.

Key Segments:

Role - Displays the Role ID and role name.

Created By - Shows the ID of the user who created the role.

Employee - Indicates the number of employees currently assigned to the role.

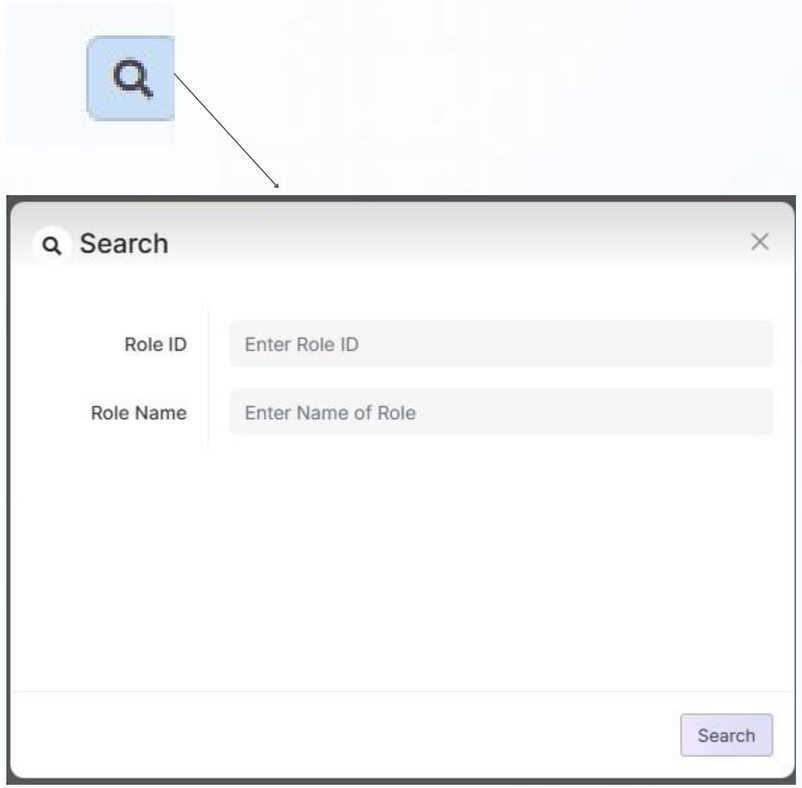
Create Date - Displays the date and time when the role was created.

Status - Indicates whether the role is Active or Inactive.

Action - Provides options to manage and configure role settings.

Role	Created By	Employee	Create Date	Status	Action
#1 Test_Role	22134602	138	09 Jun 57655 7:09:34 AM	Active	

Role



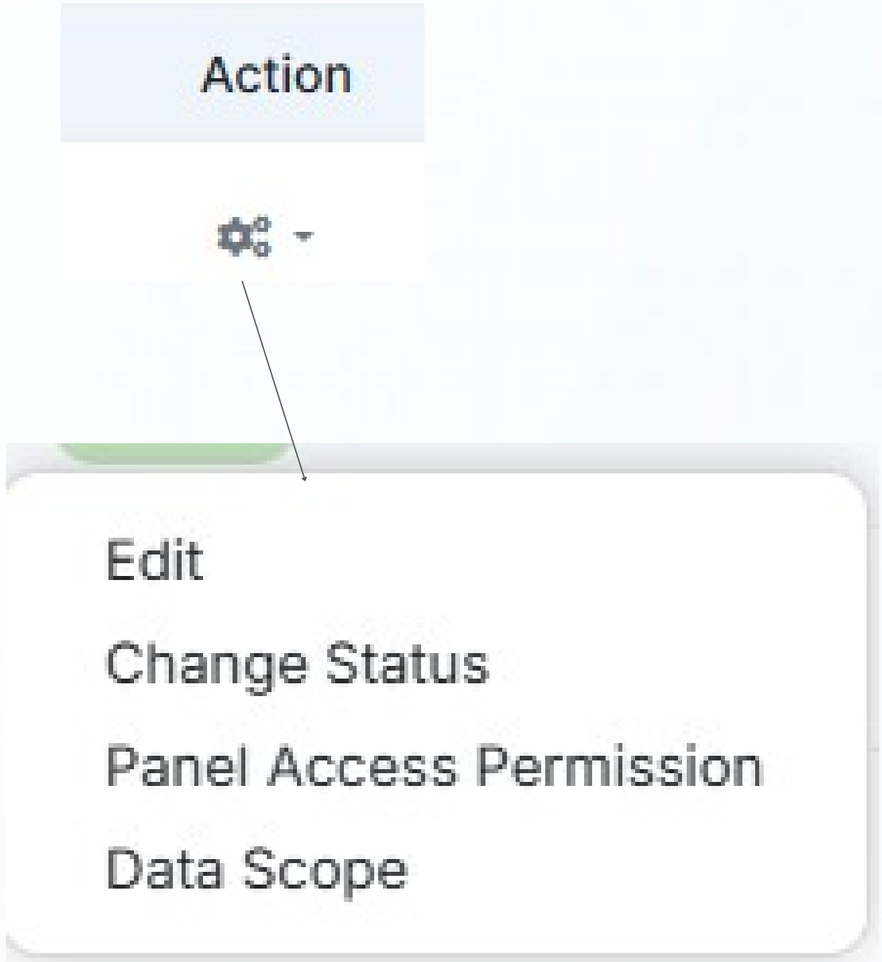
Enables quick lookup of existing roles

Key Elements:

Role ID - Type the existing Role ID to search

Role Name - Type the existing Role Name to search in the list

Role List- Action



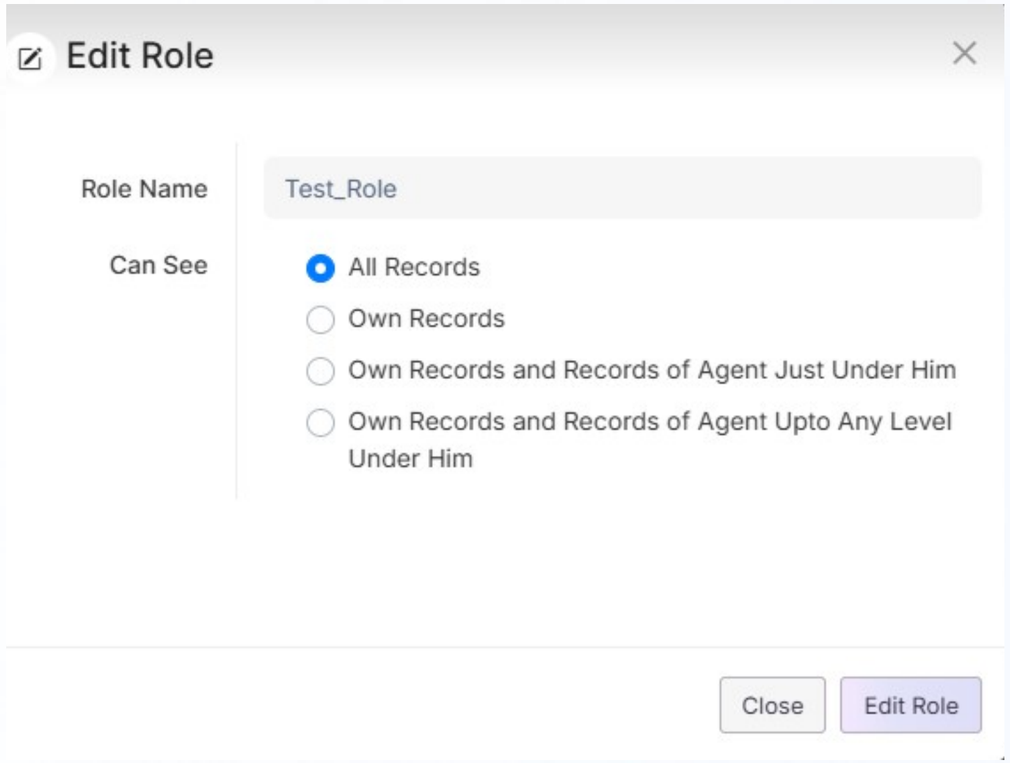
Each role row includes an Action menu that allows admins to modify role behavior, permissions, and data visibility.

Available Actions:

- Edit
- Change Status
- Panel Access Permission
- Data Scope

Each action opens in a new window for focused configuration.

Action- Edit



The Edit Role option allows admins to update the role name and define the level of record visibility for employees assigned to that role.

Key Fields:

Role Name - Displays the name of the role being edited.

Can See - Defines data visibility scope for the role:

All Records - Role can view all available records in the system.

Own Records - Role can view only records created by or assigned to the employee.

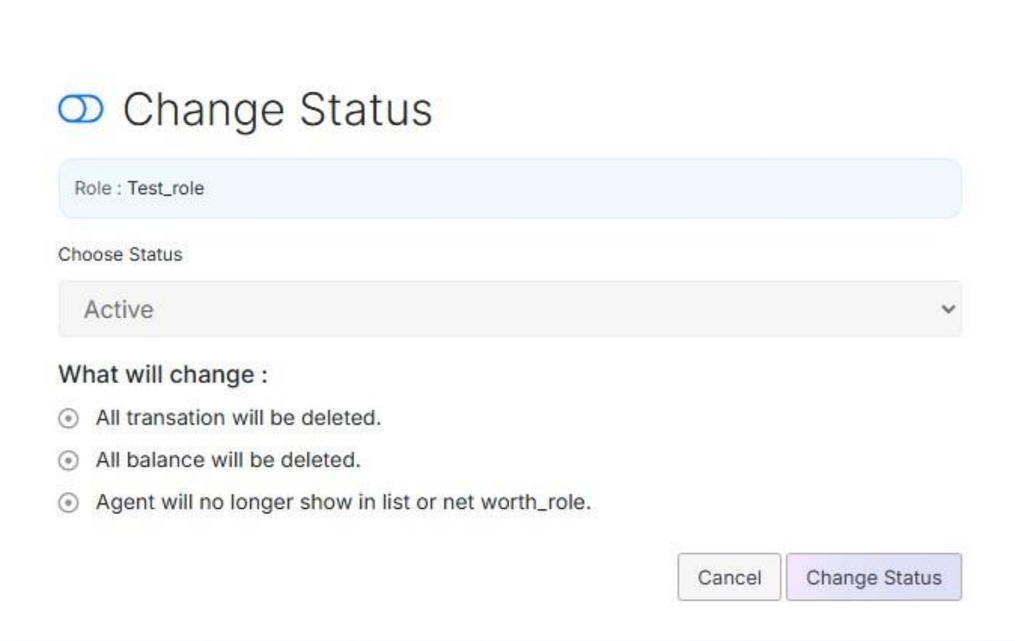
Own Records and Records of Agent Just Under Him - Role can view own records and records of directly reporting agents.

Own Records and Records of Agent Up to Any Level Under Him - Role can view records across the entire hierarchy below.

Benefit:

Ensures controlled access to data based on organizational hierarchy and responsibility levels.

Action- Change Status



The Change Status option is used to activate or deactivate a role.

Key Details:

Choose Status - Set the role as Active or Inactive.

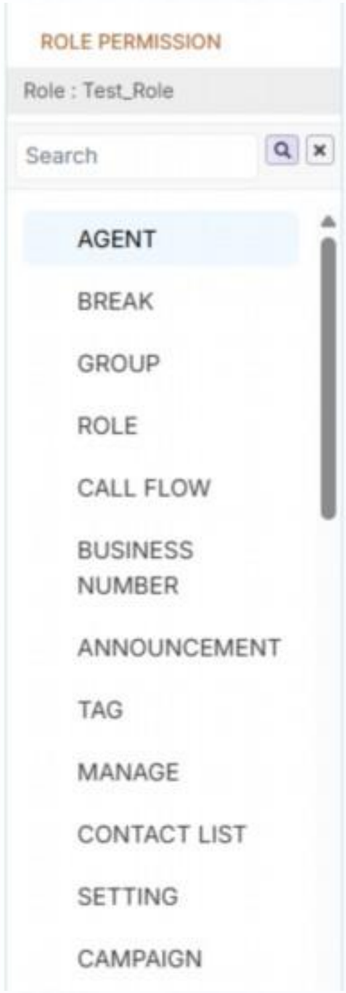
What will change:

- All transactions related to the role will be removed.
- All balances associated with the role will be deleted.
- Employees assigned to this role will no longer appear under the role or related net-worth views.

Recommendation:

Use Inactive status for temporary role suspension instead of deleting or permanently disabling role access.

Action- Panel Access Permission



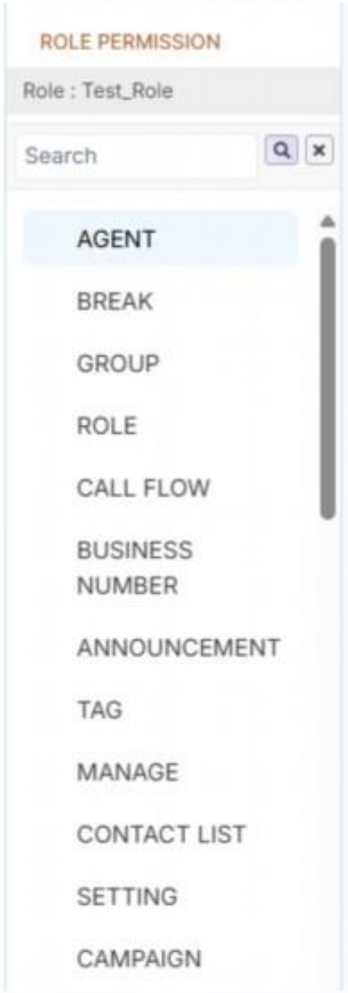
The Panel Access Permission section controls which system modules and features are accessible to a role or employee. Each permission can be enabled or disabled to ensure users only have access to relevant panels based on their responsibilities.

Core Configuration:

- Permissions are applied role-wise and inherited by all mapped employees.
- Each panel can be independently enabled or restricted.
- Changes take effect immediately after saving.

Action- Panel Access Permission

(Available Modules)



Management & Configuration:

Agent Group
Break
Call Flow
Business Number
Role
Announcement
Network Announcement
Tag
Manage
Settings
CRM Settings
Custom Action
Custom Integration
Other
New Menu
Cyber Crime

Operations & Communication:

Campaign
Docket
PBX
Callbox
Chat
Call Disposition
CLI
Directory

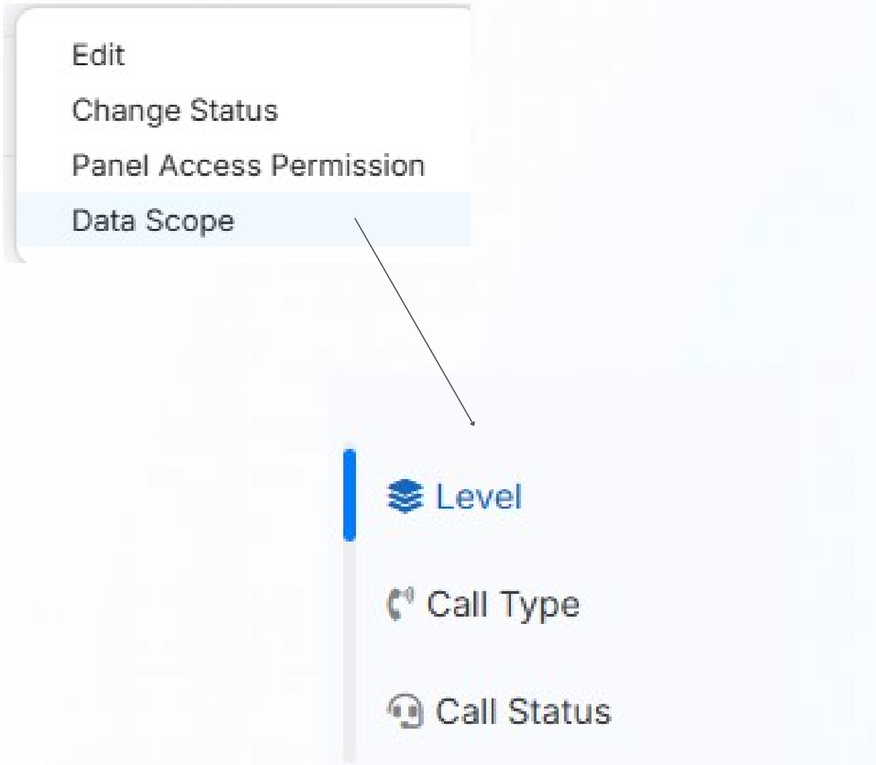
Monitoring & Live View:

Live Call
Live Queue
Live Agent
Live Dashboard
Dynamic Dashboard
Custom Dashboard
Analysis

Reports & Logs:

Report
Agent Log
Notes
UP112

Action- Data Scope



The Data Scope section defines how call data is filtered and displayed in reports.
It controls visibility based on organizational level, type of call, and call outcome.

Key Elements:

Level

Defines report visibility based on organizational hierarchy:

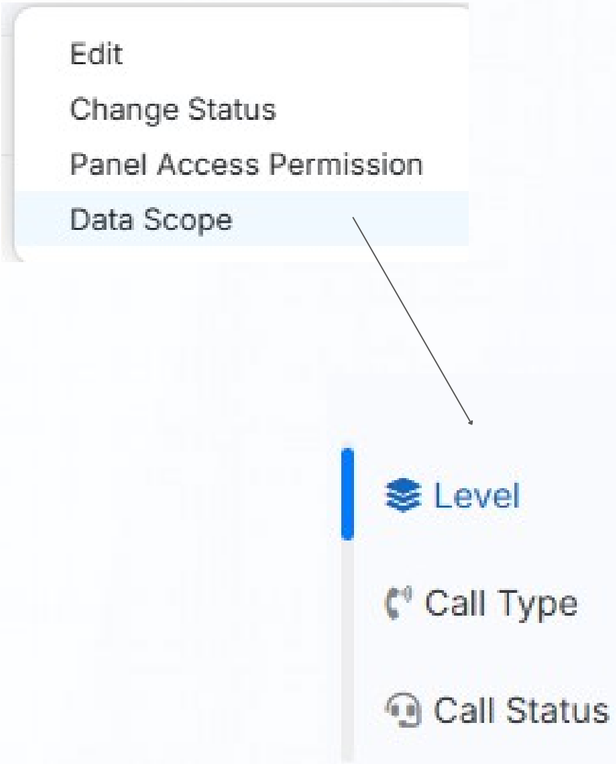
Self - Calls directly handled by the employee

Hierarchy - Calls involving employees under the user’s hierarchy

Other Employee - Calls where hierarchy is not involved

Unassigned - Calls not associated with any employee

Action- Data Scope



Key Elements:

Call Type

Controls report access based on the nature of calls, such as:

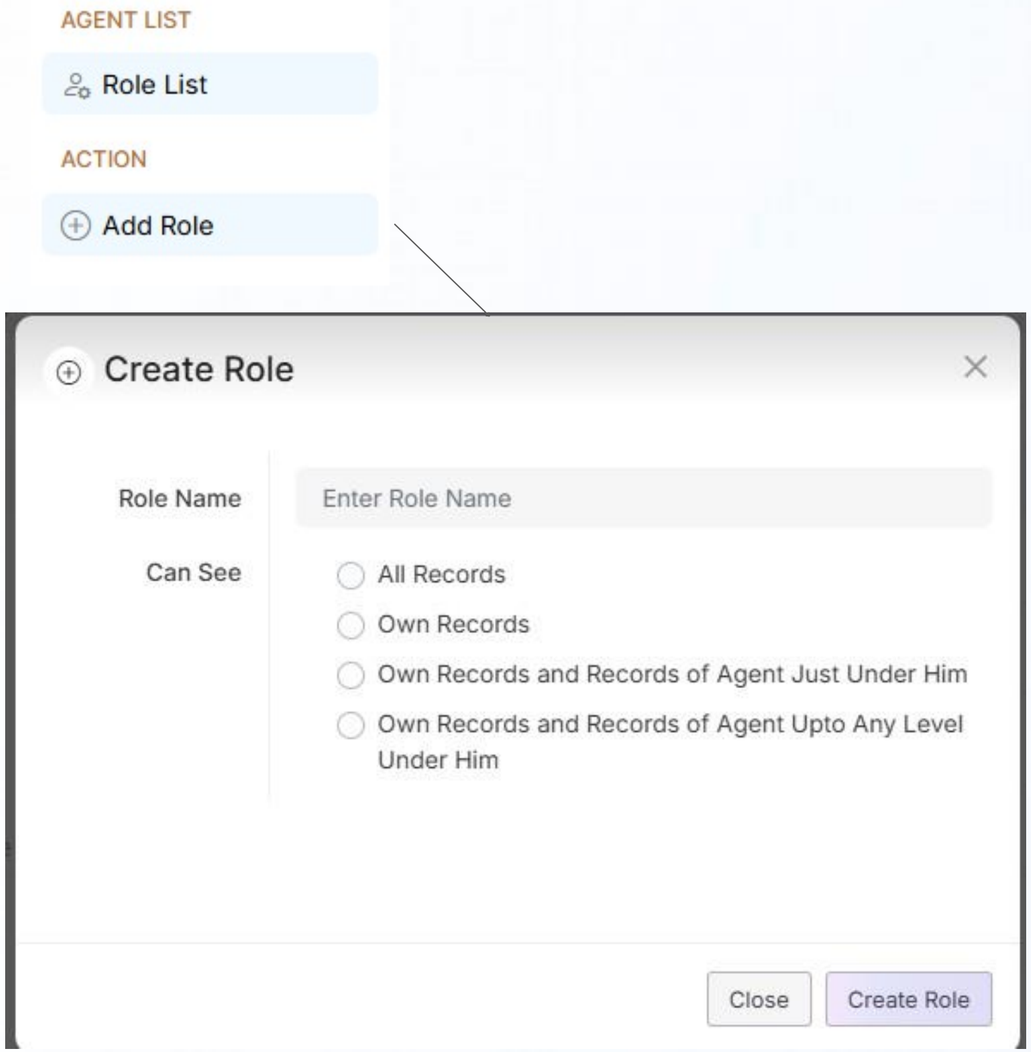
- Inbound
- Agent Campaign
- Click to Call
- Quick Call
- Broadcast
- Pool, IP Phone, Video Call, Mask Call, etc.

Call Status

Filters reports based on call outcomes and interaction scenarios:

- Answered and Unanswered combinations
- Customer ↔ Agent answered, busy, failed scenarios
- Rejected, Skipped, Busy, Failed calls
- Queue-related and hang-up statuses

Role: Add Role



The Create Role feature allows admins to define new roles in the system with controlled data visibility. Roles help structure access levels and determine how much information a user can view within the platform.

Key Elements:

Role Name

Used to define a unique and identifiable name for the role.

Can See

Determines the data visibility scope for the role. Available options define whether the role can view:

- All records across the system
- Only its own records
- Its own records along with records of directly reporting agents
- Its own records along with records of agents across multiple hierarchy levels

Hashmi Infonet

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THANK YOU!

DO YOU HAVE ANY QUESTION

info@hashmitelecom.in

+91-8097064186

www.hashmiinfonet.net