

Permissions

Last Modified on 01/06/2020 8:15 am EST

This screen is used to administer and manage user access within Kerauno.

Main Menu

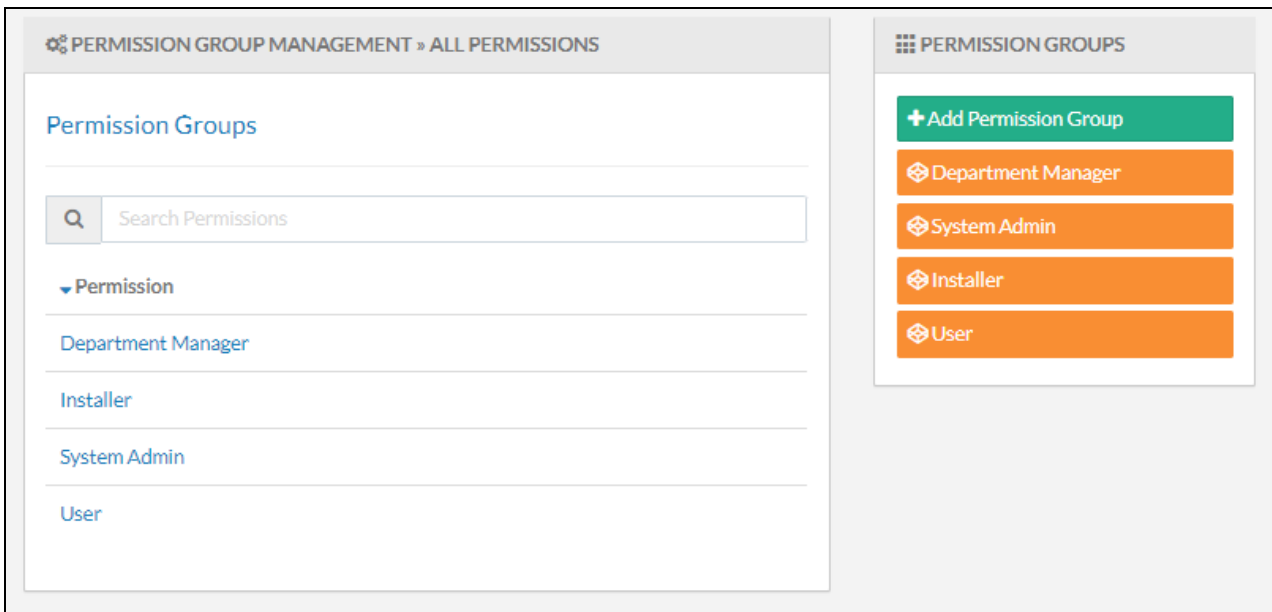
Permission Groups appear on the main screen and can be sorted by name. Click the respective Permission Group hyperlink to view more details. The right side of the screen contain links to + **Add Permission Group** and frequently accessed Permission Groups.

Kerauno recommends using the four default Permission Groups explained below to maintain controlled and consistent access across an organization.

- User
- Department Management
- System Admin
- Installer

Only add additional Permission Groups to handle exceptions.

Note: Users cannot belong to more that one Permission Group. A custom group may be needed to accommodate specific permissions such as Call Recordings.



Default Permissions Groups

User

The User group is the most basic level of access with the least amount of permissions possible. Users can view and interact within the following features:

- User Panel
 - Profile
 - Voicemail
 - Calls
 - Find Me
 - Phonebook
 - Fax
 - Devices
 - Reports
- Kerauno Presence

When new users are created in Kerauno, they are assigned this permission by default.

Note: Access to Chat+ is handled at the individual User access level via **Users & Devices > Users**.

Department Manager

The Department Manager group includes all permissions defined in the User group, along with Conference Rooms and Reporting menus.

This additional access allows Department Managers the ability to monitor call records and quickly create Conference Rooms to handle important issues. Managers can also access Ring Group calls as needed without the requirement of being part of the Ring Group. New users added as a Department Manager from **User & Devices > Departments** are assigned this permission by default.

System Admin

The System Admin group includes all permissions defined in the User and Department Manager groups above, along with Users & Devices, System Admin, and Interaction Routing menus.

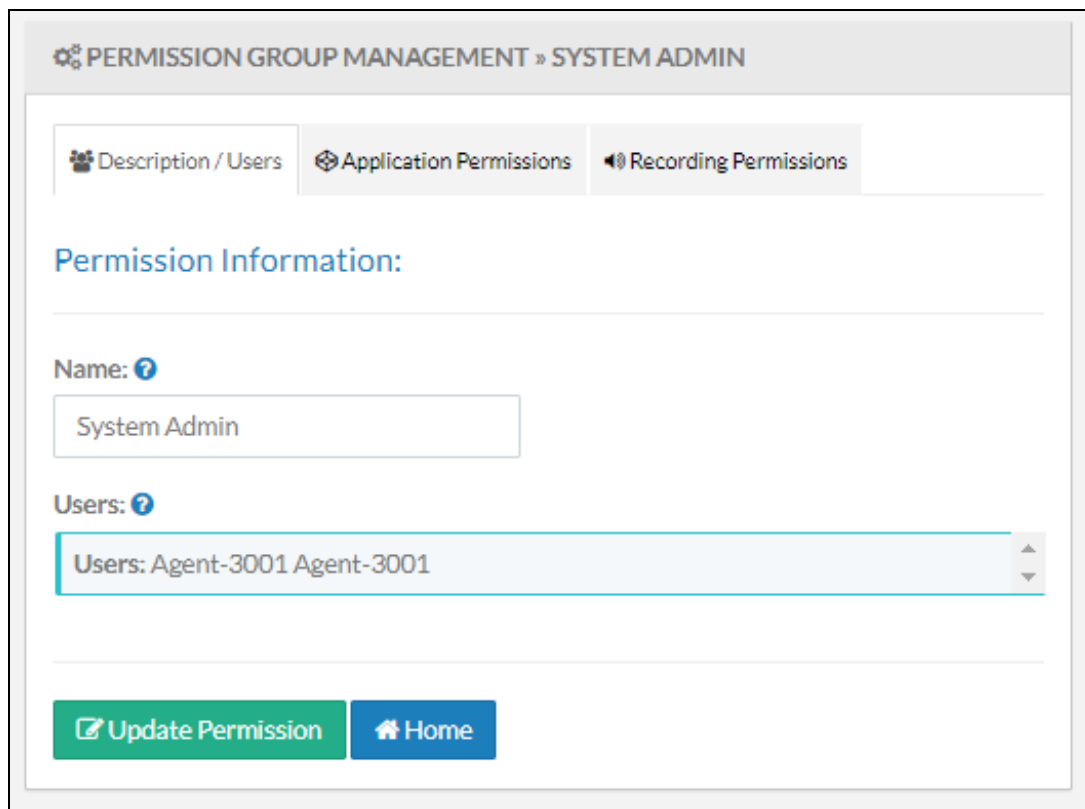
These additional permissions allow a System Admin the ability to manage Call Flows, User Configuration, and Devices with Kerauno.

Installer

The Installer permissions group has the highest level of access in Kerauno. An installer includes all permissions of a System Admin, along with access to the Systems & Settings menu where Network, Trunking, and Alerts are established within Kerauno. Many of the settings handled by this level of access are addressed during the initial installation.

Adding User to a Permission Group

Select the appropriate Permission Group from the right side of the screen. Click **Users** and select employees to add to the group from the drop-down menu. Click **Update Permission** when finished.



PERMISSION GROUP MANAGEMENT » SYSTEM ADMIN

Description / Users Application Permissions Recording Permissions

Permission Information:

Name: ?
System Admin

Users: ?
Users: Agent-3001 Agent-3001

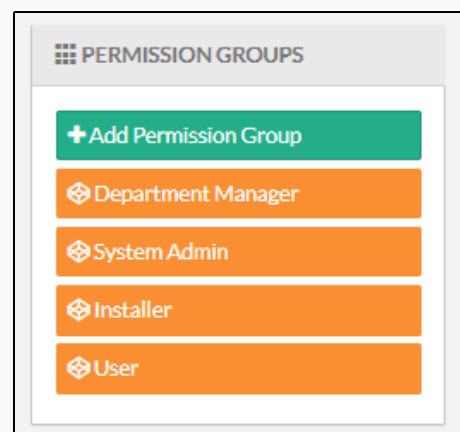
Update Permission Home

Creating Custom Permissions Groups

Click **+ Add Permission Group** to create a new Permission Group with custom Permissions outside of the four default groups.

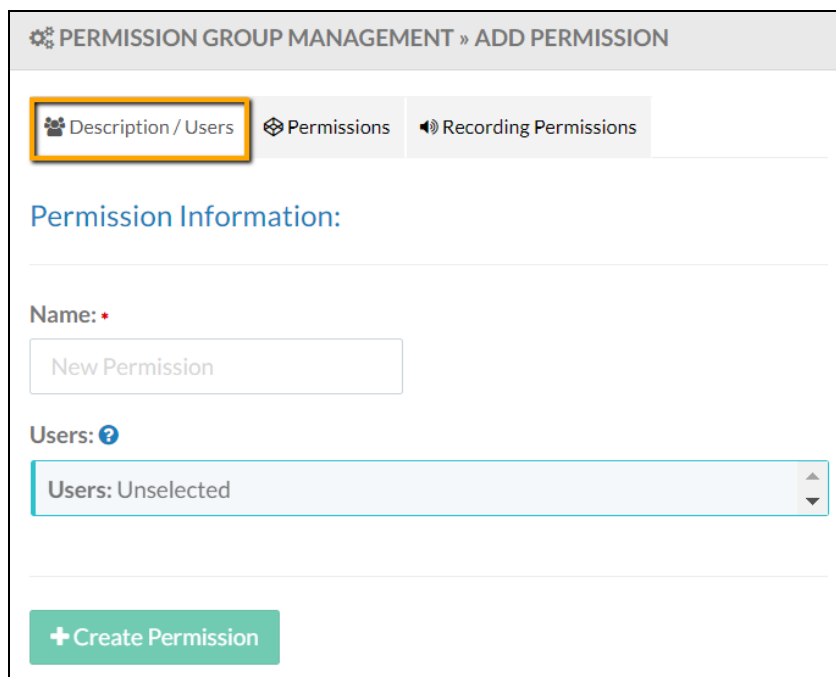
- Create a Permission name on the Description / Users tab.
- Select custom permissions on the Permissions tab.
- Enable Recording Permissions on the Recording Permissions tab.

Reminder: Kerauno recommends using these four Permission Groups to maintain consistent access across an organization. Only add additional Permission Groups to handle exceptions.



Description / Users Tab

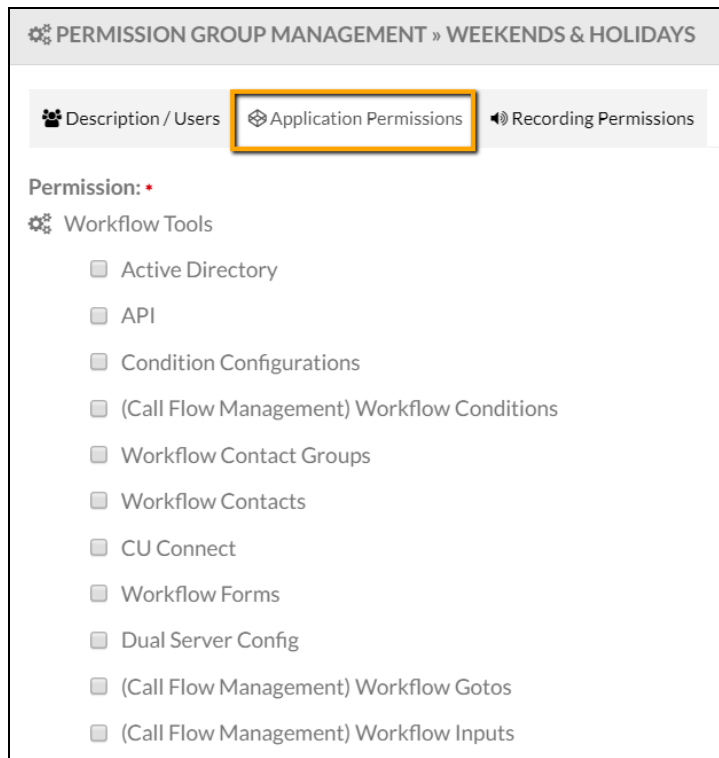
From this tab, name the new Permission Group and select users to add to the group from the Users drop-down menu. Click **Create Permission** when finished.



The screenshot shows a web interface for 'PERMISSION GROUP MANAGEMENT » ADD PERMISSION'. At the top, there are three tabs: 'Description / Users' (highlighted with a yellow border), 'Permissions', and 'Recording Permissions'. Below the tabs, the section is titled 'Permission Information:'. There is a 'Name: *' field with a text input containing 'New Permission'. Below that is a 'Users: ?' dropdown menu currently showing 'Users: Unselected'. At the bottom of the form is a green button labeled '+ Create Permission'.

Application Permissions Tab

Use this tab to manage Permissions for the active Permission Group. Mark the checkbox next to each item to grant access for the section within the Permission Group.



Permissions are organized by Kerauno section and functions such as Workflow Tools, User Panel, Interacting Routing, and Reporting.

Workflow Tools

Permission	Definition
Active Directory	Create and manage Active Directory credentials and establish sync settings for Users, and Departments. Note: Appropriate licenses required.
API	Generate API Key, add Post API URL, View API & Config Documentation. Note: Appropriate licenses required.
Condition Configurations	Create and manage conditional configurations for use in a Call Flow.
(Call Flow Management) Workflow Conditions	Insert Workflow Conditions in a Call Flow.

Workflow Contact Groups	Create and manage Contact Groups for use in a Call Flow.
Workflow Contacts	Create and manage individual Contacts for use in a Call Flow.
CU Connect	Manage integrations with Episys, Corelation, and FiServ. Note: Appropriate licenses required.
Workflow Forms	Create and manage Workflow Forms for use in Flows.
Dual Server Config	Configure and manage a secondary server for backup safeguards. Note: Appropriate licenses required.
(Call Flow Management) Workflow Gotos	Create and insert Workflow GoTo's in a Call Flow.
(Call Flow Management) Workflow Inputs	Create and insert Workflow Inputs in a Call Flow.
Salesforce Integration	Configure and manage Salesforce API, Sandbox Mode, Users, and Settings.
(Call Flow Management) Workflow Tagging	Create and insert Workflow Tagging in a Call Flow.
VPN Configuration	Configure and manage VPN settings. Note: Appropriate licenses required.
Webhook Configurations	Create and manage Webhook Configurations to use in Flows.
(Call Flow Management) Workflow Webhooks	Create and manage Workflow Webhooks in a Call Flow.
Workflow Tag Management	Create and manage Workflow Tags in a Call Flow.

Zoom Integration	Manage Zoom API credentials and Webhook. Note: Appropriate licenses required.
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System Admin

Permission	Definition
Active SMS Interactions	View active SMS interactions and end interactions as needed.
Dial Plans	Create and manage Custom Dial plans.
Feature Codes	Review a list of System Reserved Feature Codes and descriptions along with Application Speed Dials and descriptions.
Bulk Import	Bulk Import files and download previously uploaded data.
Music on Hold	Create and manage Playlists for use within Kerauno.
Number Manager	Create and manage system numbers and force trunk as needed.
System Connector	Add a System Connector to connect a Kerauno instance to another system.
Presence Management	Create and manage Custom Extension Groups within Presence.
System Recordings	Create and manage announcements for use within Kerauno.
Trunks	Add a new SIP Trunk to connect two different unified communication platforms.
Voicemail Blasting	Create a voicemail blast to be sent as a voicemail to all Kerauno users.
Core Rebuild	Ability to apply changes within Kerauno.

Conference Rooms

Permission	Definition
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Ad-Hoc Conferences	Create and manage Ad-Hoc Conference Rooms that are available at all times.
Leader-Based Conferences	Create and manage Leader-Based Conference Rooms that require both a participant and leader PIN to operate.

User Panel

User Panel	Definition
Calls	Review call history metrics.
Devices	Review associated devices and extensions assigned to a Kerauno user.
Workflow Forms	Ability to configure workflow forms.
Fax	Send, receive, and review fax communications.
Find Me	Enable Find Me.
JIRA Manager	Create and manage JIRA Account Manager accounts.
Reports	View system generated reports.
Phonebook	View User, Extensions, and Department listings. Access Phonebook PDF and Bolt directory.
Kerauno Presence	Toggles presence on/off for a user.
Voicemail	Access and manage voicemail messages, establish greetings, and configure settings.

Reporting

Permission	Definition
Agent Analytics	View agent activity across all Ring Groups.
CDR Logs	Run reports on Call Detail Reports (CDR).
Workflow Form Report	Run reports on workflow forms.
Downline Report	View outbound call information for logged in agents within a Ring Group.

In-Call Analytics	View call routing path through Kerauno.
Call Recordings	Listen to and download recorded calls.
Ring Group Analytics	View Ring Group and queue management metrics.
Scheduled Reports	Displays all scheduled reports.
SMS Reports	View SMS details by DID data and interactions by SMS Flow.
Trunk Analytics	View inbound and outbound call information by trunk.
Wallboard	Generate and view wallboards.

Interaction Routing

Permission	Definition
Call Ring Group Modifiers	View/create Ring group Modifiers in flow module.
Call Announcements	View and create call announcements in flow module.
Call Blacklist	Manage and add numbers to blacklist; meaning calls from these numbers will not be delivered.
Flows	Create and manage call flows for use within Kerauno.
SMS/Call Toggles	View Call/SMS flow toggles in SMS Flows.
Holiday Lists	Create and manage call routing settings for holidays and non-business hours for use within Kerauno.
SMS Inbound Msg.	Create and manage inbound SMS messages for use within Kerauno.
Call IVRs	View and create IVRs in flow module.
SMS Messaging Group	Create and manage SMS Messaging Groups for use within Kerauno.
Call Inbound Routes	View inbound routes in flow module.
Call Parking Lots	Create and manage Parking Lots for use within Kerauno.

SMS Outbound Msg.	Create and manage outbound SMS messages for use within Kerauno.
Call Ring Groups	Create and manage Ring Groups for multiple endpoints for use within Kerauno.
Call Speed Dials	Create and manage Speed Dial destinations for use within Kerauno.
Call/SMS Time Conditions	View/create Time conditions in Call and SMS Flows.

System Settings

Permission	Definition
Email & System Alerting	Manage alerts for email and Ring Groups.
Backup/Restore	Establish backup settings for local as well as remote destinations. Perform backup restores as needed and manage backup alerts.
Network & Firewall	Create and manage Firewall Rules.
System Health	View system health performance metrics and restart services as needed.
Licensing	View current license details and apply new licenses as needed.
System Logs	System Log report available for CSV export, print, or PDF.
Migration Kit	Create and manage Extension Aliases as needed. Toggle outbound routes over internal dialing.
Remote Storage	Create new remote destination and manage remote storage alerts.
System Settings	Access System Settings.

Updates	View available system updates and edit server backup setting prior to update.
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Users & Devices

Permission	Definition
Departments	Create and manage departments for use within Kerauno.
Devices	Create and manage devices on the Kerauno system. Find new devices and reboot as needed.
User Forwarding	Add user forwarding settings for use within Kerauno.
Generic Extensions	Create and manage generic extensions within Kerauno.
Generic Faxes	Create and manage generic faxes within Kerauno.
Generic Voicemails	Create and manage generic voicemails within Kerauno.
Paging Zones	Create and manage paging zones for use on the Kerauno system.
Permissions	Add users to default Permission groups. Add new permission groups only as needed.
Users	Create and manage users within Kerauno.

Recording Permissions Tab

The Call Recordings checkbox must first be checked under the Reporting section on the Application Permissions tab before the following permission option displays on the Recording Permissions tab.

Permission	Definition
All Recording Permissions	Record all calls for the active Permission Group.

Edit or Delete a Permission Group

Click on the Permission Group Name to edit, make the needed edits, and click **Update Permission** when finished.

To delete a created Permission Group, access the group and click **Delete Permission**.

Note: Default Permission Groups cannot be deleted.

The screenshot shows a web interface for managing permission groups. At the top, there is a breadcrumb trail: "PERMISSION GROUP MANAGEMENT » WEEKENDS & HOLIDAYS". Below this, there are three tabs: "Description / Users", "Application Permissions", and "Recording Permissions". The "Description / Users" tab is currently selected. Underneath the tabs, the section "Permission Information:" is displayed. It contains a "Name:" field with a help icon and the text "Weekends & Holidays". Below that is a "Users:" field with a help icon and a list of users: "Users: Agent-3003 Agent-3003, Agent-3004 Agent-3004". At the bottom of the form, there are three buttons: "Update Permission" (green), "Delete Permission" (red), and "Home" (blue).