

User Management & Access Control – Requirements Document

1. Purpose

This document defines the **user management hierarchy, roles, permissions, and live chat/ticket handling requirements** for the system.

The goal is to ensure **clear ownership, controlled access, performance tracking, and smooth chat/ticket operations** before development begins.

2. User Roles & Hierarchy

The system will support a **three-level user hierarchy**:

```
Owner
├── Manager(s)
│   └── Agent(s)
```

2.1 Role Definitions

Owner

- Top-level user
- Full system access
- Can manage all users, modules, chats, and tickets

Manager

- Mid-level user
- Reports to Owner or another Manager
- Can manage only the users they create

Agent

- Operational user
 - Handles chats and tickets
 - No user creation privileges
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3. User Creation & Management Rules

3.1 User Creation Permissions

Role	Can Create Owner	Can Create Manager	Can Create Agent
Owner	✗	✓	✓
Manager	✗	✓	✓
Agent	✗	✗	✗

3.2 User Scope & Visibility

- **Owner**
 - Can view and manage **all managers and agents**
 - Can track system-wide performance
- **Manager**
 - Can view and manage **only the managers and agents they created**
 - Cannot see or access agents created by other managers
- **Agent**
 - Can only view their own profile and assigned work
 - No visibility into other users

4. Module Access Control

4.1 Access by Role

Module / Feature	Owner	Manager	Agent
User Management	✓	Limited	✗
Live Chat	✓	✓	✓
Ticket Management	✓	✓	✓
Performance Analytics	✓	✓(Own Agents)	✗
Reports & Dashboards	✓	Limited	✗
System Settings	✓	✗	✗

4.2 Access Rules

- **Owner**
 - Has access to all modules without restrictions
- **Manager**
 - Has access only to assigned modules
 - Can track **performance, chats, and tickets** of their own agents
- **Agent**
 - Has access only to **work-related modules**
 - Cannot view analytics, user lists, or system settings

5. Agent Performance Tracking

5.1 What Can Be Tracked

Managers and Owners can track:

- Number of chats handled
- Chat response time
- Resolution time
- Tickets created/resolved
- Escalations
- Customer ratings (if applicable)

5.2 Visibility

- **Owner:** Can view performance of all managers and agents
 - **Manager:** Can view performance of only their agents
 - **Agent:** Can view only their own performance (optional feature)
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6. Live Chat & Ticket Management

6.1 Chat Capabilities

- Agents handle live customer chats
 - Chats can be:
 - Assigned
 - Transferred
 - Escalated
 - Converted into tickets
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7. Chat & Ticket Actions

7.1 Assign

- Owner or Manager can assign chats/tickets to agents
- Assignment is limited to agents under their hierarchy

7.2 Transfer

- Agents can transfer chats to:
 - Another agent (if allowed)
 - A manager
 - Managers can transfer chats among their agents
 - Owners can transfer chats to any manager or agent
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7.3 Escalate

- Agents can escalate chats or tickets to their manager
 - Managers can escalate to:
 - Another manager (if permitted)
 - Owner
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7.4 Create Ticket

- Tickets can be created from:
 - Live chat
 - Manual entry by agent, manager, or owner

Ticket Creation Rules:

- Agent can create tickets only for their own chats
 - Manager can create tickets for chats handled by their agents
 - Owner can create tickets for any chat or customer
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8. Ticket Visibility & Ownership

Role	Ticket Visibility
Owner	All tickets
Manager	Tickets created by or assigned to their agents
Agent	Tickets assigned to them

9. Audit & Logging (Optional but Recommended)

- Log all actions:
 - User creation
 - Role changes
 - Chat transfers
 - Ticket escalations
 - Owner should have access to audit logs
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10. Non-Functional Requirements

- Role-based access control (RBAC)
- Secure authentication & authorization
- Scalable user hierarchy

- Real-time updates for chat transfers
 - Data isolation between managers
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11. Future Enhancements (Optional)

- Custom roles & permissions
- Agent skill-based routing
- SLA management
- Notification system for escalations