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How do I limit agent access to tickets by ?department

Admin - (٠) تعليقات - Matias Navarro Carter - 2024-02-07

.One function of departments is limiting agent access to tickets

For example, you can set up your helpdesk so that your support agents only have access to tickets in the Support .department, while your sales staff can only access tickets in the Sales department

You implement this using \mathbf{agent} $\mathbf{permission}$ \mathbf{groups} to set department permissions; you can manage them from .Agents > Permission Groups in the admin interface

By default, all your agents are part of the built-in **All Permissions** and **All Non-Destructive Permissions** groups, which provide access to all departments and can't be edited. Therefore, to set up selective department .access, you need to remove your agents from those groups



Edit: All Permissions

id: :

Information Permissions	Departments	
Ticket Chat		
Ticket	Can assign to	Full access
Customer Support		
Customer Support - EU	(0)	©
Customer Support - AUS	(0)	(
Customer Support - USA	(a)	(
Complaints	(0)	(
IT Support	(0)	(
HR	(0)	(
Finance	(0)	(
Sales	(0)	(
Training Booking	((
Test	((a)
	×	

Select the **All Permissions** group Properties tab and remove all the agents who should have limited department .access by unselecting the checkboxes. Repeat for All Non-Destructive Permissions

Select All

Edit: All Permissions

Information Permissions Departments

This is a special built-in permission group that grants all permissions to members. Agents in this group will have full access to the agent interface, including access to all ticket departments.

Name

All Permissions

Agents (11 of 20 selected) Q Search



Hannah Scott

Sherlock Holmes

John Watson

Letitia Hudson

Shinwell Johnson

Athelney Jones

Greg Lestrade

Mycroft Holmes

James Moriarty

Irene Adler

Langdale Pike

 \leq Lara Proud

 \leq Agent

(MW) Matt Wray

Paul Davies

Alesia Burvin

Joell

Chris Padfield

Kimberley Wilson

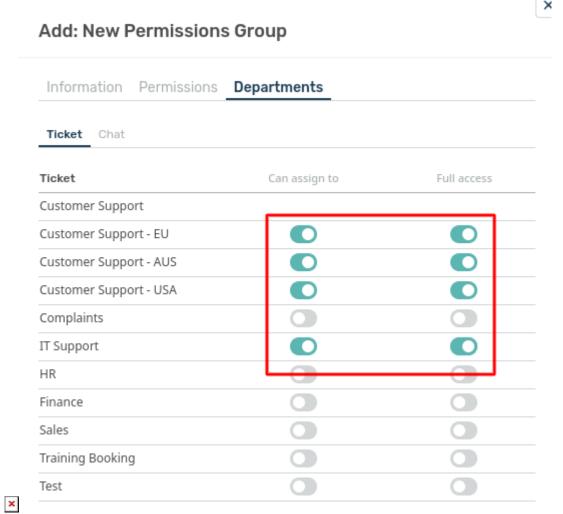
Now you need to grant back all the permissions you have just removed, except that you will grant full access to .each department selectively

:There are two ways to do this

Method 1: Multiple Permission Groups

You can create several different permission groups, each one granting access to a different department (as well as all the other permissions your agents need). If you have a lot of agents to manage relative to the number of .departments, this is the best option

. For example, you could create permission groups with Sales department access and Support department access



. You can then assign agents to the appropriate permission group to give them either Sales or Support access

×

Add: New Permissions Group

Info	rma	tion Permissions Departm	nents
Name			
Sale			
Agent	S (5 c	of 20 selected)	Select All
Q	Sear	ch	
	-	Admin	
		Hannah Scott	
		Sherlock Holmes	
	(John Watson	
	2	Letitia Hudson	
~		Shinwell Johnson	
$\overline{\mathbf{Z}}$		Athelney Jones	
☑		Greg Lestrade	
		Mycroft Holmes	
	9	James Moriarty	
		Irene Adler	
		Langdale Pike	
	8	Lara Proud	
	(AG)	Agent	
	(MW)	Matt Wray	
	0	Paul Davies	
		Alesia Burvin	
	3	Joell	
	(2)	Chris Padfield	
	(KW)	Kimberley Wilson	

Method 2: Single Permission Group

You can create a single permission group with no department permissions (but all the other permissions your agents need), and then grant department permissions from individual agent profiles. This may be quicker if you .have a low agen to department ratio, e.g. you only have one agent per department

In this case, you would assign all your agents to the same permission group, then set their department .permissions individually

Properties	Permission	Department	Notifications	2FA				
_		fined sets of perm groups to apply to	-	asily apply to mu	ıltiple			
Permissions G	Sele	ct All						
MITNOT	i-Destructive re	TITIISSIOTIS						
☐ All Peri	All Permissions							
Custon	Customer Support Trainees							
Custon	Customer Support							
Custon	Customer Support Managers							
✓ IT Supp	oort							
□ Notes	☐ Notes only agents							
This will unl	s you make will	below and remov not take effect, ui	e this agent from					
Ticket		Can ass	ign to	Full access				
Customer Sup	port							
Customer Support - EU)	•	1			
Customer Support - AUS		•						
Customer Support - USA		•						
Complaints		Q						
IT Support		•)	•				
HR		Q						
Finance		0						
Sales		Q						
Training Booking		0						
Test								

Notes

For departments where the agent doesn't have full access, you can choose to grant 'assign' access. This means .1 the agent is allowed to assign a ticket to that department, but nothing else: so after they assign the ticket, they .won't be able to see it

You can see which permission groups and individual agents have access to each department by going to .2 . Ticket Structure > Departments, and looking at the departments' Permission tabs