

How can I set up agent permissions, permission groups and department access?

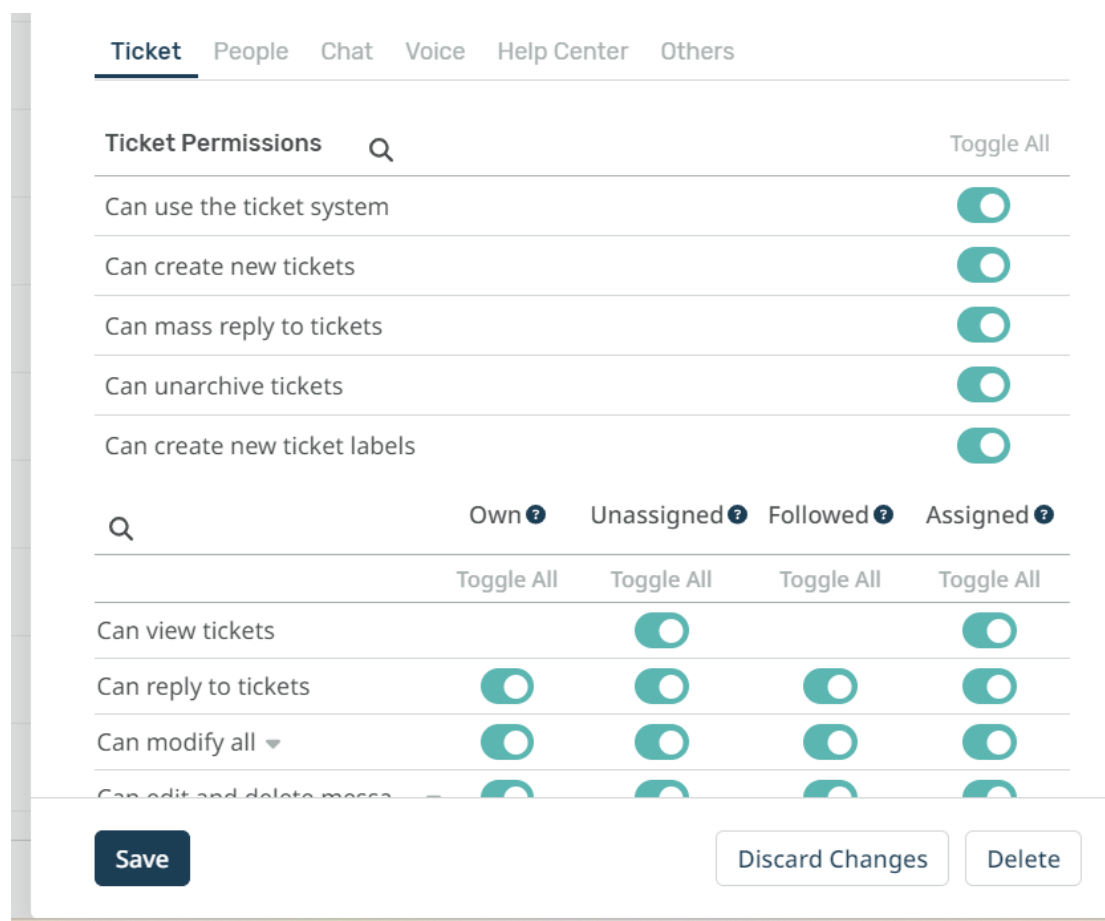
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The Deskpro agent permissions system is designed to give admins granular control over what agents can see and do in the helpdesk. In this article, we'll explain how you can set up permissions for various different situations.

Basic concepts

Each agent account has a set of permissions which grant access to different functions.

Under **Admin > Agents > Agent Profiles** you can grant permissions to each agent individually:



The screenshot shows the 'Agent Permissions' configuration page in Deskpro. At the top, there are tabs for 'Ticket', 'People', 'Chat', 'Voice', 'Help Center', and 'Others'. The 'Ticket' tab is selected. Below the tabs, there's a 'Ticket Permissions' section with a search icon and a 'Toggle All' button. This section contains five permissions, all of which are currently enabled (indicated by green toggle switches): 'Can use the ticket system', 'Can create new tickets', 'Can mass reply to tickets', 'Can unarchive tickets', and 'Can create new ticket labels'. Below this, there's a section for permissions categorized by ticket status: 'Own', 'Unassigned', 'Followed', and 'Assigned'. Each category has a 'Toggle All' button and a search icon. The 'Own' category has one permission, 'Can view tickets', which is enabled. The 'Unassigned', 'Followed', and 'Assigned' categories each have three permissions, all of which are enabled: 'Can reply to tickets', 'Can modify all', and 'Can edit and delete messages'. At the bottom of the form, there are three buttons: 'Save', 'Discard Changes', and 'Delete'.

| Permission | Own | Unassigned | Followed | Assigned |
|------------------------------|---------|------------|----------|----------|
| Can use the ticket system | Enabled | Enabled | Enabled | Enabled |
| Can create new tickets | Enabled | Enabled | Enabled | Enabled |
| Can mass reply to tickets | Enabled | Enabled | Enabled | Enabled |
| Can unarchive tickets | Enabled | Enabled | Enabled | Enabled |
| Can create new ticket labels | Enabled | Enabled | Enabled | Enabled |
| Can view tickets | Enabled | Enabled | Enabled | Enabled |
| Can reply to tickets | Enabled | Enabled | Enabled | Enabled |
| Can modify all | Enabled | Enabled | Enabled | Enabled |
| Can edit and delete messages | Enabled | Enabled | Enabled | Enabled |

Agents also have department permissions. There are two levels of department permission:

- **Full access** - means that agents has full visibility over tickets in a department
- **Can assign to** - means agents can assign tickets to the department, but not have visibility over the ticket once assigned to it.

| Ticket Chat | | |
|------------------------|-------------------------------------|-------------------------------------|
| Ticket | Can assign to | Full access |
| Customer Support | | |
| Customer Support - EU | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Customer Support - AUS | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Customer Support - USA | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Complaints | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| IT Support | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Permission Groups

To save time applying permissions to agents, you can create **permission groups** which will grant permissions to multiple agents at once. A permission group stores a set of permissions, and when you add an agent to the group, the agent is granted all those permissions. You can add an agent to more than one permission group.

There are two built-in permission groups:

- **All Permissions** - Agents in this group will have full access to the agent interface, including access to all ticket departments.
- **All Non-Destructive Permissions** - Agents that are in this group will have nearly full access to the agent interface, including access to all ticket departments. The only permissions that this group does not grant are those which allow certain destructive actions, such as irreversible delete operations.

Permissions are additive

The key concept to remember is that **permissions are always additive**, whether you grant them through the agent's individual account or by adding the agent to a permission group.

If you add an agent to 3 different permission groups, they will have *every* permission that is granted by *any* one of their groups.

You can't take away a permission on an agent's individual account that's been granted from a permission group. For example, here's the profile of an agent who's a member of the **All Non-Destructive Permissions** group.

Ticket
People
Chat
Voice
Help Center
Others

Ticket Permissions
Toggle All

| | | | | |
|------------------------------|-------------------------------------|--|--|--|
| Can use the ticket system | <input checked="" type="checkbox"/> | | | |
| Can create new tickets | <input checked="" type="checkbox"/> | | | |
| Can mass reply to tickets | <input checked="" type="checkbox"/> | | | |
| Can unarchive tickets | <input checked="" type="checkbox"/> | | | |
| Can create new ticket labels | <input checked="" type="checkbox"/> | | | |

Q
Own
Unassigned
Followed
Assigned

Toggle All
Toggle All
Toggle All
Toggle All

| | | | | |
|------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Can view tickets | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Can reply to tickets | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Can modify all | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Can edit and delete messa... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Can delete and spam tickets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Save
Discard Changes
Delete

The permissions granted through the group are shown as locked; you can't remove them individually (because permissions are additive) - so if you wanted this agent not to be able to create new tickets, you'd have to remove them from the permission group altogether.

However, you can *add* extra permissions to an individual agent's account. Because it's not granted through a permission group, it's considered a **permission override**.

Permissions Groups
Override Permissions

This will unlock the toggles below and remove this agent from all permission groups. Any changes you make will not take effect, until you click "Save"

Managing permissions with only a few agents

The point of permission groups is to make it quicker to edit large numbers of agents.

If you only have a few agents who need widely different permissions, there is no need to set up permission groups. It's quicker just to edit permissions on each agents' profile.

If you have a small number of agents who all need the same custom permissions, you could add them all to the same custom permission group. That way, if you decide to change your permissions policy, you can change all of them at once.

Separate permission levels and department access

Suppose your helpdesk is divided up like this:

- Different agents may need access to one or more of three departments: Sales, Support and Accounts
- Agents include:
 - Trainees who need limited permissions
 - Standard employees who need more permissions
 - Managers who need all permissions.

Clearly, it's impractical to make groups for Sales Trainee, Support Trainee, Accounts Trainee, Sales & Support Trainees etc.

A better way to implement this would be to set up a "Sales Dept Access" permission group that *only* grants Sales department access, and nothing else:



Then do the same for the Support and Accounts departments, etc.

Then set up a Trainee permission group, a Standard permission group and a Managers permission group.

This lets you apply permissions like this:

Permission groups are pre-defined sets of permissions you can easily apply to multiple agents. Select the permission groups to apply to this agent:

Permissions Groups (2 of 5 selected)

Select All

- ☐ All Non-Destructive Permissions
- ☐ All Permissions
- ☒ Sales
- ☐ Support
- ☒ Trainees